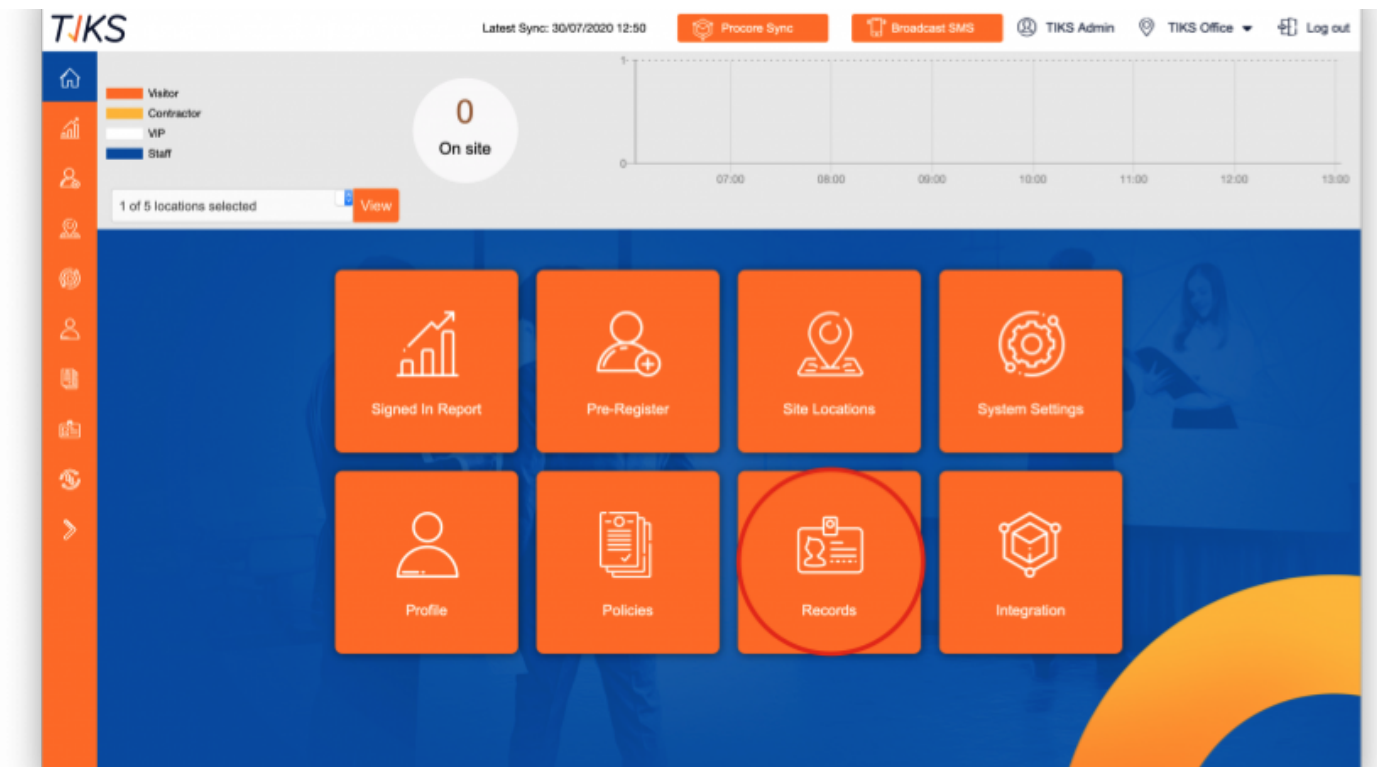


How to Set Up Records for Contractor Companies

How to Set Up Records for your Contracting Companies

1. Log into the admin portal
2. Tap on the "Records" button



Step 1: Tap on the "Records Type Settings"

Home
Companies List
Download Report
Filter Results
Search

Show entries:

Test Company

Sam Marciano

sam+test@tik.com.au

+61 - 0421969482

1 of 3 locations selected

- [Select all]
- Milagre Site
- TIKS Office
- TIKS Test Site

Record Type Settings
Invide Company

Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals View Records Refresh Delete
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Refresh Delete
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Refresh Delete

Step 2: Tap on the "Add Records Type"

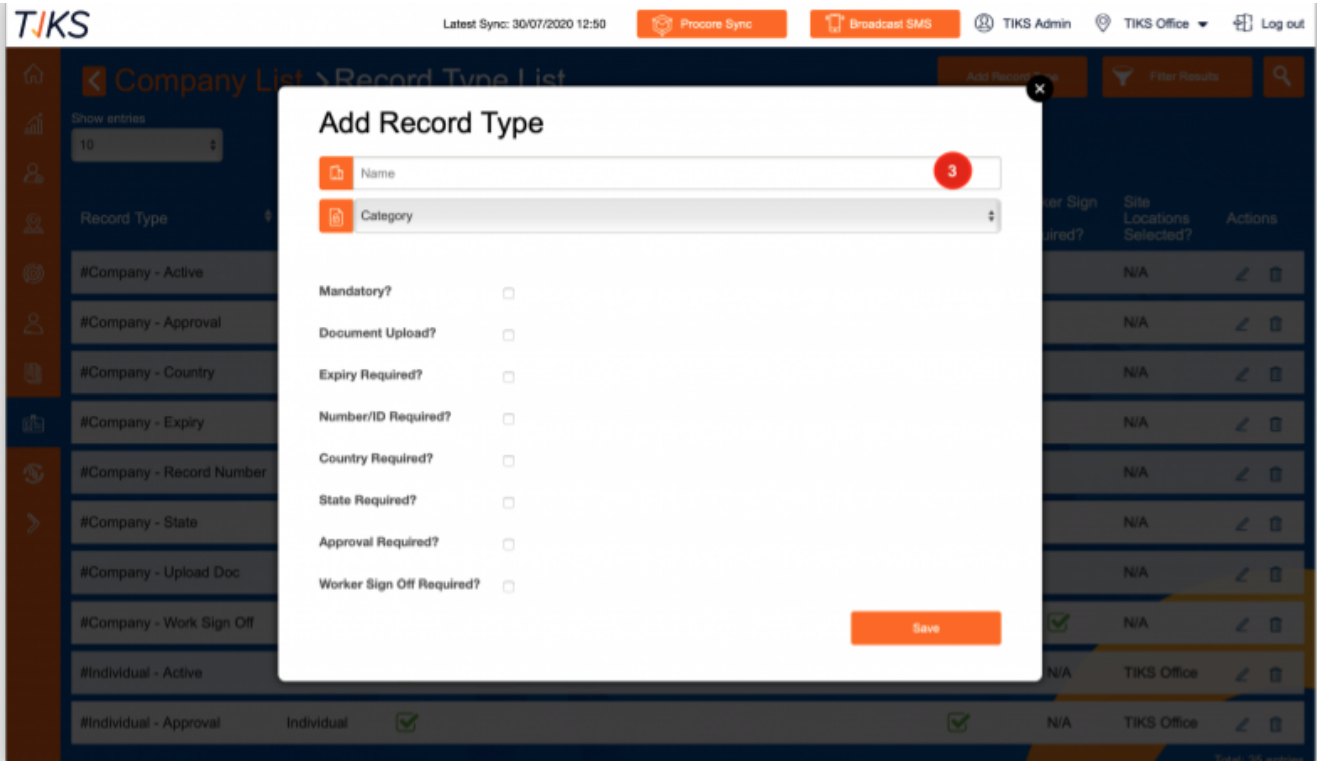
Company List > Record Type List

Show entries: 10

Record Type	Category	Mandatory?	Document Upload?	Expiry Required?	Number/ID Required?	Country Required?	State Required?	Approval Required?	Worker Sign Off Required?	Site Locations Selected?	Actions
#Company - Active	Company	✓								N/A	✎ 🗑
#Company - Approval	Company	✓						✓		N/A	✎ 🗑
#Company - Country	Company	✓				✓				N/A	✎ 🗑
#Company - Expiry	Company	✓		✓						N/A	✎ 🗑
#Company - Record Number	Company	✓			✓					N/A	✎ 🗑
#Company - State	Company	✓					✓			N/A	✎ 🗑
#Company - Upload Doc	Company	✓	✓							N/A	✎ 🗑
#Company - Work Sign Off	Company	✓							✓	N/A	✎ 🗑
#Individual - Active	Individual	✓								N/A	TIKS Office ✎ 🗑
#Individual - Approval	Individual	✓						✓		N/A	TIKS Office ✎ 🗑

Total: 35 entries

Step 3: Give this record a Name/title ie: "Safe Work Method Statements"



Step 4: To make this record available to the Contractor Company, please select "Company" in the **Category dropdown list** and select the options which are relevant for this record. **Once done, please tap on the "Save" button.**

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expiry Required: Select this if you want to capture the expiry date of this record

Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked

Worker Sign Off Required: Select this option if you would like the Contractor Worker to acknowledge that they have viewed the information the Company has submitted against this record

Add Record Type

Name

Company

Mandatory?

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

Worker Sign Off Required?

Save

Revision #6

Created 5 years ago

Updated 5 years ago by [Robert Milagre](#)