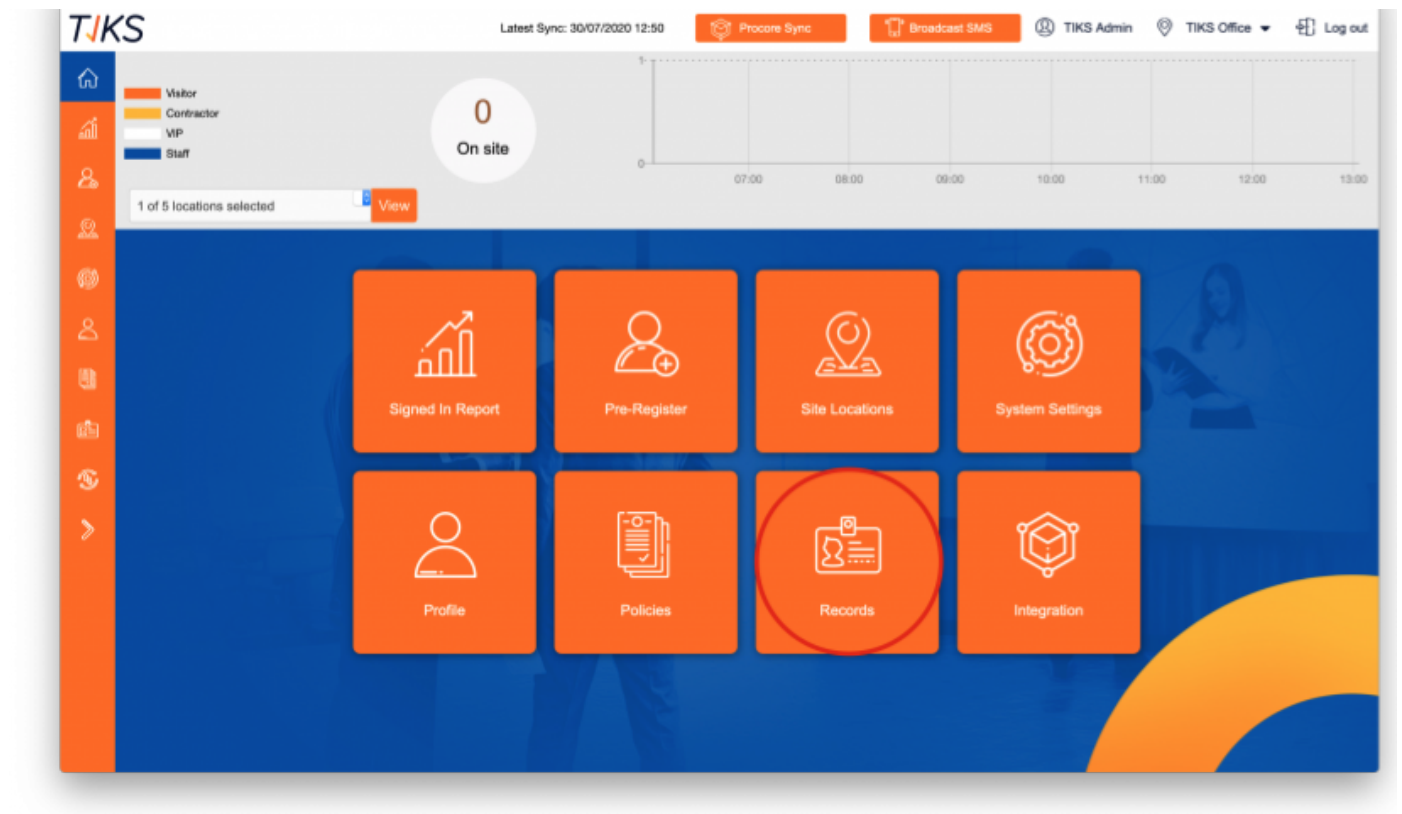


# How to Set Up Records for Contractor Companies

## 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"

TIKS

Latest Sync: 30/07/2020 12:50

Procore Sync

Broadcast SMS

TIKS Admin

TIKS Office

Log out

Companies List

Show entries

10

Test Company

Sam Marciano

sam+test@tiks.com.au

+61 0421969482

1 of 3 locations selected

☐ [Select all]

☐ Milagre Site

☒ TIKS Office

☐ TIKS Test Site

1

Record Type Settings

Invite Company

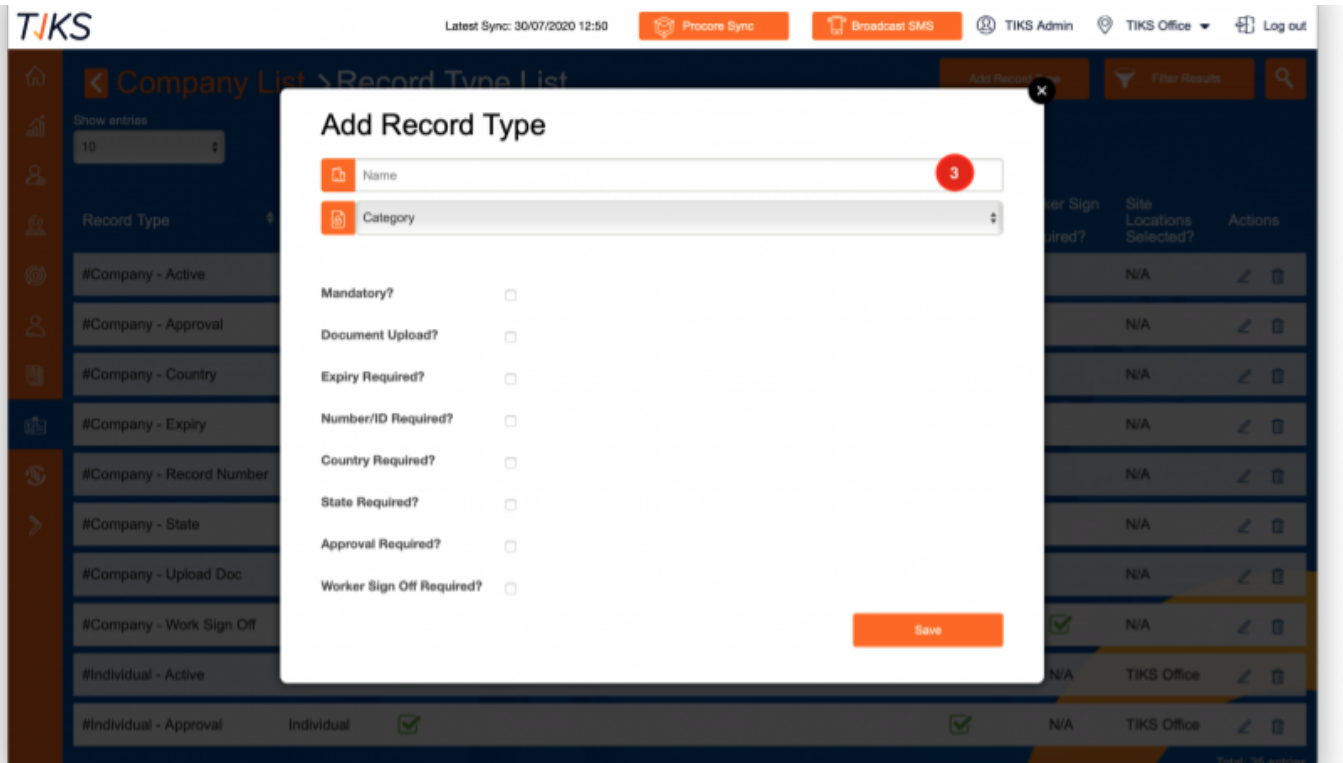
Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div>
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office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

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	<a href="#">✎</a> <a href="#">✖</a>
#Company - Approval	Company	✓						✓		N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - Country	Company	✓				✓				N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - Expiry	Company	✓		✓						N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - Record Number	Company	✓			✓					N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - State	Company	✓					✓			N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - Upload Doc	Company	✓	✓							N/A	<a href="#">✎</a> <a href="#">✖</a>
#Company - Work Sign Off	Company	✓							✓	N/A	<a href="#">✎</a> <a href="#">✖</a>
#Individual - Active	Individual	✓							N/A	TIKS Office	<a href="#">✎</a> <a href="#">✖</a>
#Individual - Approval	Individual	✓						✓	N/A	TIKS Office	<a href="#">✎</a> <a href="#">✖</a>

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

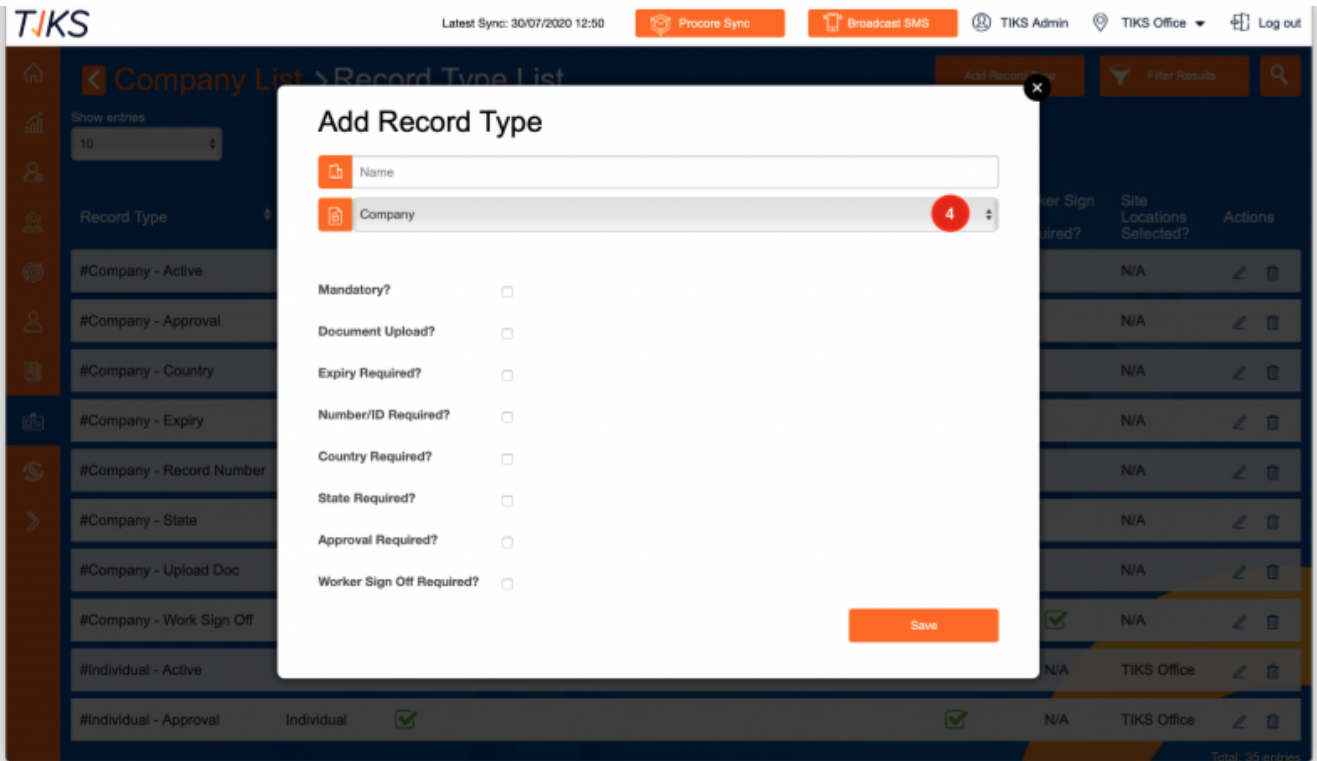
**Number/ID Required:** Select this if you require to capture the record number, an example may be the Policy Number or Licence number

**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



Revision #6

Created 4 years ago

Updated 4 years ago by [Robert Milagre](#)