

How you onboard a new Contractor Company (no Procore integration)

Inviting a new Contracting Company (no Procore)

The instructions below are to manually invite a contracting company to onboard. When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

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

Next, to invite a **Contracting Company** you will need to fill in the following fields:

- Step 1: Add the Company name
- Step 2: Add the Company Admin user's Full Name
- Step 3: Add their admin user's email address
- Step 4: Add their admin user's mobile number
- Step 5: Select which active sites this Company can work on.

Now tap on the "Invite Company" to finalise the registration. The Admin user for this account will now be notified by email.



Companies List

Download Report Filter Results

Show entries
10

Test Company 1 Sam Marclano 2 sam@test@tik.com.au 3 +61 - 0421969482 4

1 of 3 locations selected

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

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	View Individuals 1 View Records ⏪ ⏩
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ⏪ ⏩
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ⏪ ⏩

Revision #5
Created 5 years ago
Updated 5 years ago by Robert Milagre