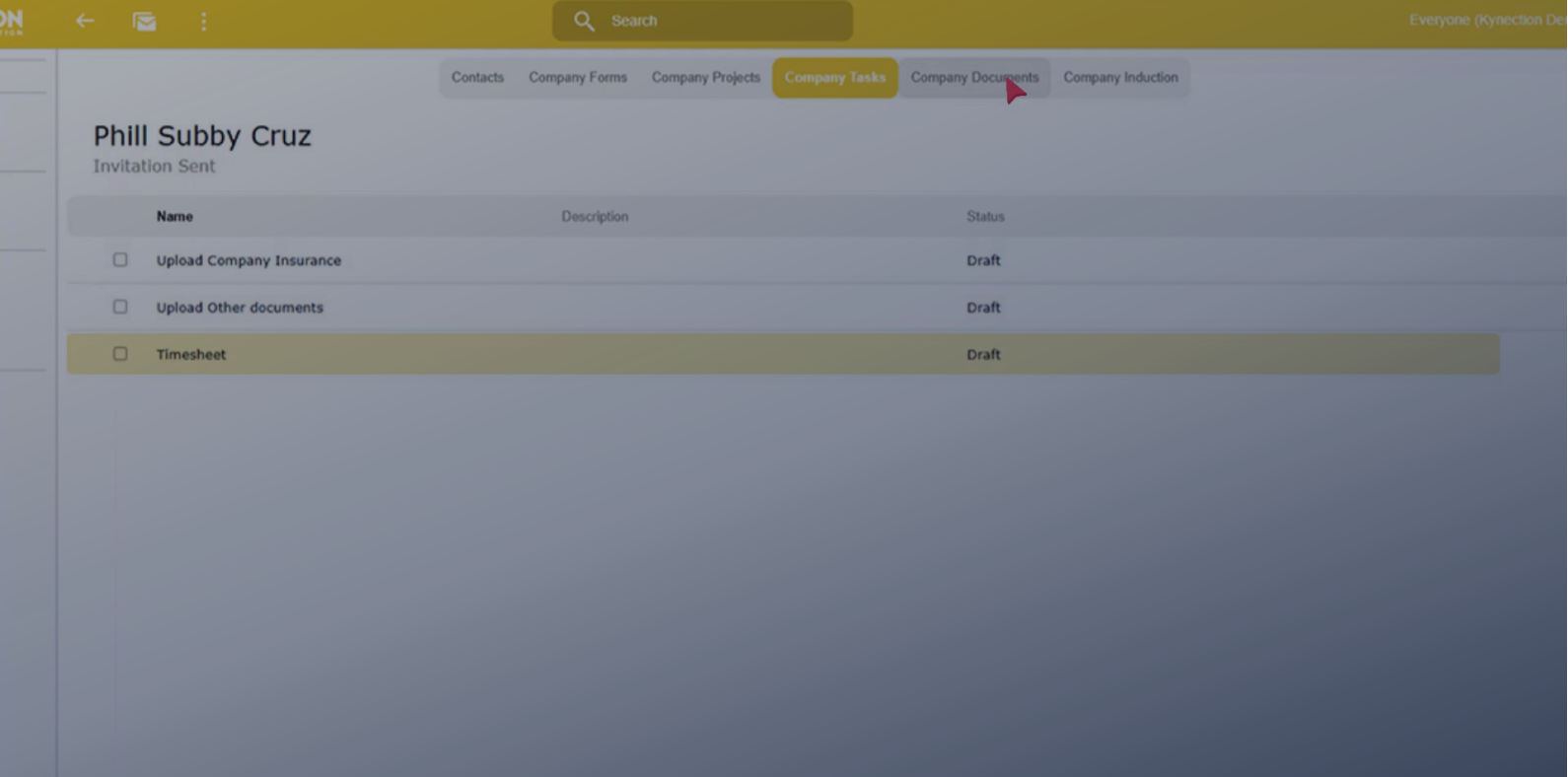




MODULE OVERVIEW

KYNECTION · SUBCONTRACTOR PORTAL

Use the Subcontractor Portal

The module overview, covering both sides of the portal. The head contractor grants access, sets the compliance requirements and invites a company to a project. The subcontractor signs in, completes their induction and lodges insurance, SWMS and plant records.

6 CHAPTERS

5 MIN 53 SEC

SUBCONTRACTOR PORTAL

WEB USERS · CONTRACT ADMIN

What this module overview covers

Seven stages run the full cycle. Chapters 1 to 3 are the head contractor setting up access and requirements. Chapter 4 is the invitation. Chapters 5 and 6 are the subcontractor completing their induction. Chapter 7 is reviewing what came back.

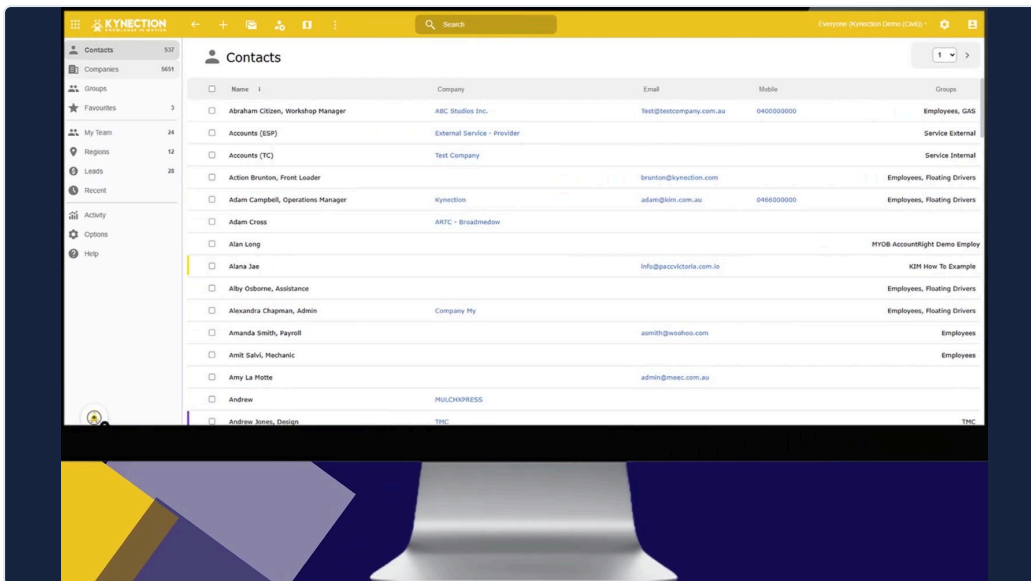
CH 01	Grant portal access Access starts on the subcontractor's contact record, not on their company.	00:00–00:53
CH 02	Set what the company must provide Requirements are configured per company, so a labour-only trade is not asked for plant registrations.	00:53–01:52
CH 03	Invite them to a project The invitation ties a company to a project and emails their nominated contact.	01:52–02:57
CH 04	The subcontractor signs in From the invitation email into their own portal account.	02:57–03:40
CH 05	Lodge the compliance records Insurance, SWMS, chain of responsibility, safety data sheets and any sub-contractors of their own.	03:40–04:49
CH 06	Review what came back The head contractor checks compliance, then sees the project view the subcontractor gets.	04:49–05:53

- **Two audiences, one workflow.** Chapters 1 to 4 and 7 are done by your team; chapters 5 and 6 are what the subcontractor sees. Worth reading both sides before you roll it out.
- **Requirements are set per company.** What a subcontractor must supply is configured against their company record, so a labour-only trade is not asked for plant registrations.
- **Compliance is colour coded.** The insurance matrix flags never expiring, expiring within 30 days, expired, not submitted and approval required, so gaps are visible without opening records.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Grant portal access

Access starts on the subcontractor's contact record, not on their company.

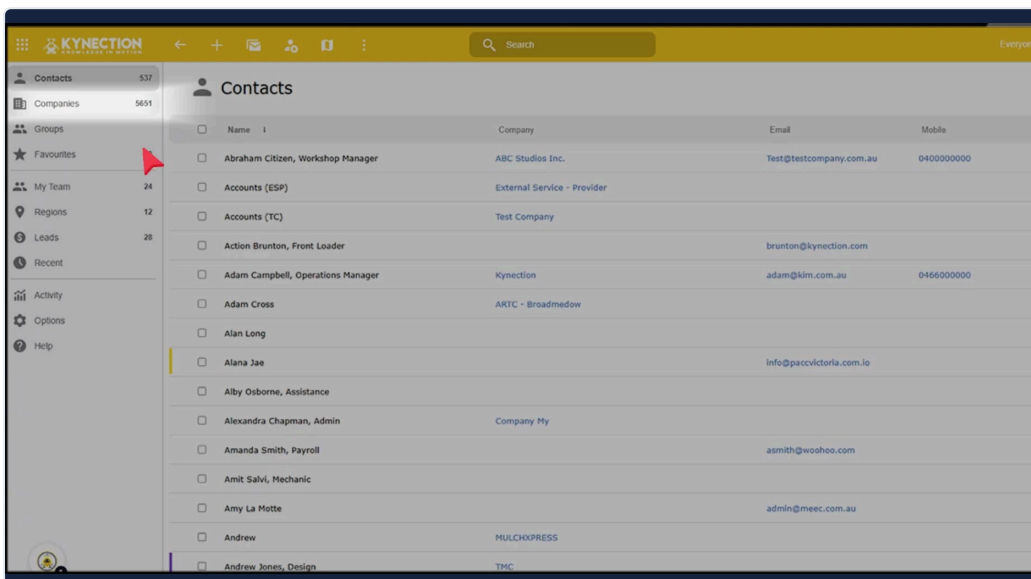


STEP 1 • 00:12 IN THE VIDEO

Open Contacts

Contacts lists everyone in the system with their company, role and email.

CHAPTER 01 • STEP 1 OF 3



STEP 2 • 00:15 IN THE VIDEO

Find the subcontractor

Select the person who will be the portal user for that company.

CHAPTER 01 • STEP 2 OF 3

Grant portal access

KYNECTION KNOWLEDGE IN MOTION

Edit Company

Name

Name: Phill Subby Cruz

Phone: 0397849442

ACN:

Address

Street: 110 Railway Parade

City: Seaford

State: VIC

Zipcode: 3198

Country: Australia

Web Site:

Email: phillip@kynnection.cc

Position:

STEP 3 • 00:32 IN THE VIDEO

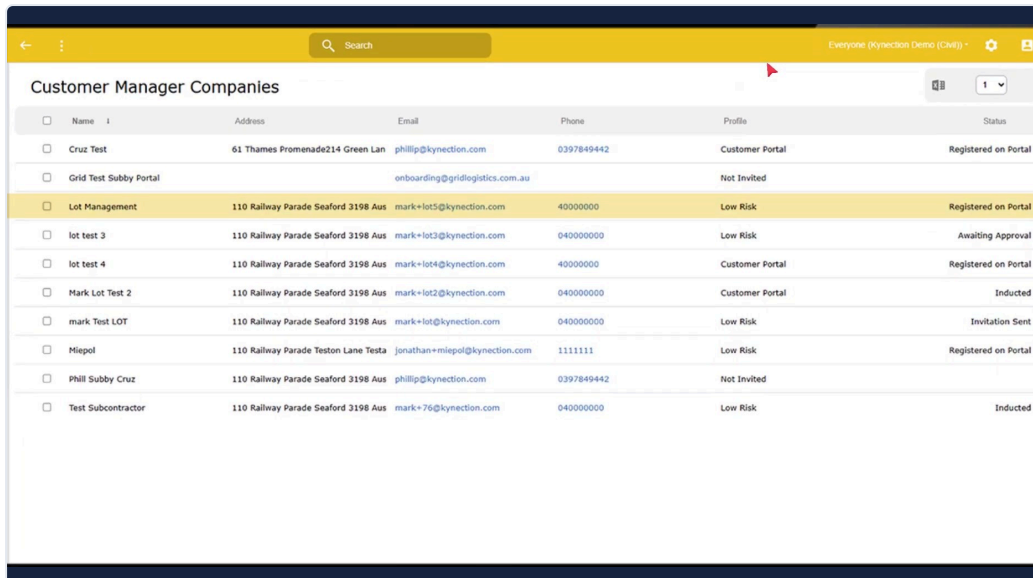
Complete their details

The contact record takes the name, phone, ACN and full address, including city, state, postcode and country, alongside their position.

CHAPTER 01 • STEP 3 OF 3

Set what the company must provide

Requirements are configured per company, so a labour-only trade is not asked for plant registrations.



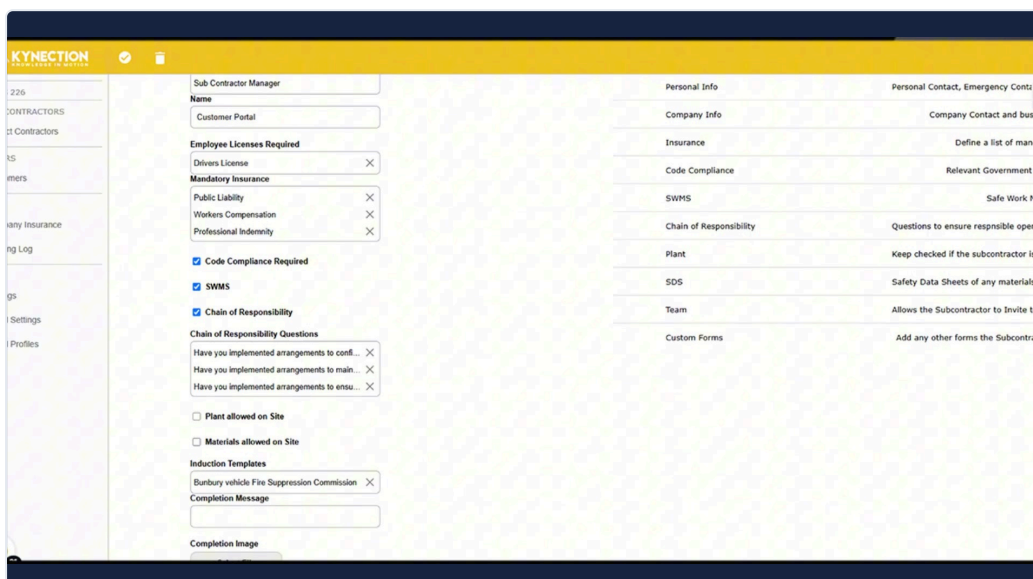
☐	Name	Address	Email	Phone	Profile	Status
☐	Cruz Test	61 Thames Promenade 214 Green Lan	phillip@kynecton.com	0397849442	Customer Portal	Registered on Portal
☐	Grid Test Subby Portal		onboarding@gridlogistics.com.au		Not Invited	
☐	Lot Management	110 Railway Parade Seaford 3198 Aus	mark+lot5@kynecton.com	40000000	Low Risk	Registered on Portal
☐	lot test 3	110 Railway Parade Seaford 3198 Aus	mark+lot3@kynecton.com	040000000	Low Risk	Awaiting Approval
☐	lot test 4	110 Railway Parade Seaford 3198 Aus	mark+lot4@kynecton.com	40000000	Customer Portal	Registered on Portal
☐	Mark Lot Test 2	110 Railway Parade Seaford 3198 Aus	mark+lot2@kynecton.com	040000000	Customer Portal	Inducted
☐	mark Test LOT	110 Railway Parade Seaford 3198 Aus	mark+lot@kynecton.com	040000000	Low Risk	Invitation Sent
☐	Miepol	110 Railway Parade Teston Lane Testa	jonathan+miepol@kynecton.com	11111111	Low Risk	Registered on Portal
☐	Phill Subby Cruz	110 Railway Parade Seaford 3198 Aus	phillip@kynecton.com	0397849442	Not Invited	
☐	Test Subcontractor	110 Railway Parade Seaford 3198 Aus	mark+76@kynecton.com	040000000	Low Risk	Inducted

STEP 1 • 00:53 IN THE VIDEO

Open the companies register

Companies list with their contact, email, portal type and status: not invited, awaiting approval, registered on portal, invitation sent or inducted, each with a risk rating.

CHAPTER 02 • STEP 1 OF 3



KYNECTION

Sub Contractor Manager

Name: Customer Portal

Employee Licenses Required:

- ☒ Drivers License
- ☒ Mandatory Insurance
- ☒ Public Liability
- ☒ Workers Compensation
- ☒ Professional Indemnity

☒ Code Compliance Required

☒ SWMS

☒ Chain of Responsibility

Chain of Responsibility Questions:

- ☒ Have you implemented arrangements to conf...
- ☒ Have you implemented arrangements to main...
- ☒ Have you implemented arrangements to ensu...

☐ Plant allowed on Site

☐ Materials allowed on Site

Induction Templates:

Barbury vehicle Fire Suppression Commission

Completion Message:

Completion Image:

Personal Info

Personal Contact, Emergency Cont...

Company Info

Company Contact and busine...

Insurance

Define a list of mandat...

Code Compliance

Relevant Government Co...

SWMS

Safe Work Met...

Chain of Responsibility

Questions to ensure responsible operati...

Plant

Keep checked if the subcontractor is al...

SDS

Safety Data Sheets of any materials/cf...

Team

Allows the Subcontractor to Invite team...

Custom Forms

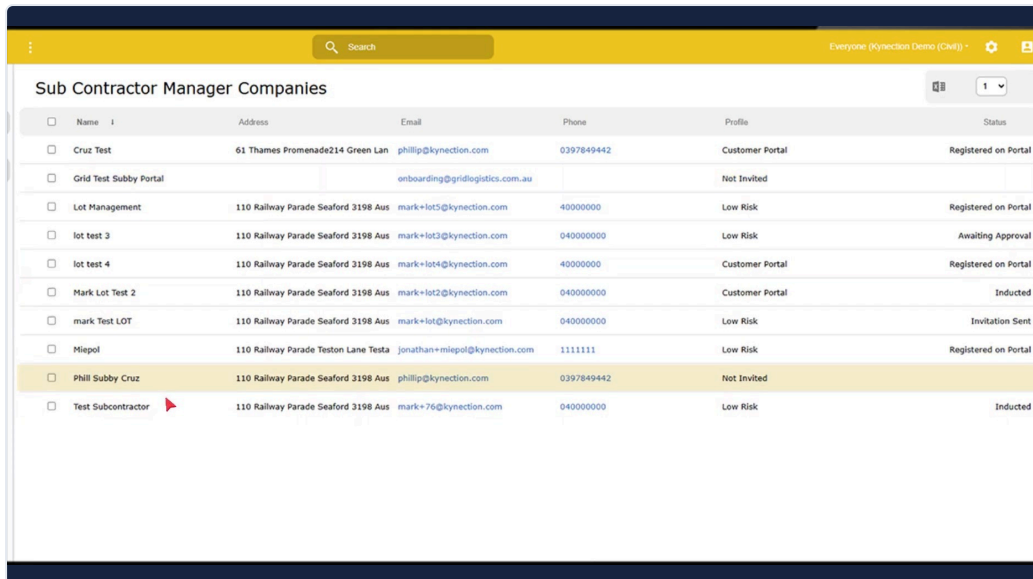
Add any other forms the Subcontract...

STEP 2 • 01:20 IN THE VIDEO

Configure the requirements

Against the company you set the employee licences required, the mandatory insurances, whether code compliance and SWMS are needed, the chain of responsibility questions, whether plant is allowed on site, and the induction template and completion message.

Set what the company must provide



☐	Name	Address	Email	Phone	Profile	Status
☐	Cruz Test	61 Thames Promenade 214 Green Lan	phillip@kynection.com	0397849442	Customer Portal	Registered on Portal
☐	Grid Test Subby Portal		onboarding@gridlogistics.com.au		Not Invited	
☐	Lot Management	110 Railway Parade Seaford 3198 Aus	mark+lot5@kynection.com	40000000	Low Risk	Registered on Portal
☐	lot test 3	110 Railway Parade Seaford 3198 Aus	mark+lot3@kynection.com	040000000	Low Risk	Awaiting Approval
☐	lot test 4	110 Railway Parade Seaford 3198 Aus	mark+lot4@kynection.com	40000000	Customer Portal	Registered on Portal
☐	Mark Lot Test 2	110 Railway Parade Seaford 3198 Aus	mark+lot2@kynection.com	040000000	Customer Portal	Inducted
☐	mark Test LOT	110 Railway Parade Seaford 3198 Aus	mark+lot@kynection.com	040000000	Low Risk	Invitation Sent
☐	Miepol	110 Railway Parade Teston Lane Testa	jonathan+miepol@kynection.com	11111111	Low Risk	Registered on Portal
☐	Phill Subby Cruz	110 Railway Parade Seaford 3198 Aus	phillip@kynection.com	0397849442	Not Invited	
☐	Test Subcontractor	110 Railway Parade Seaford 3198 Aus	mark+76@kynection.com	040000000	Low Risk	Inducted

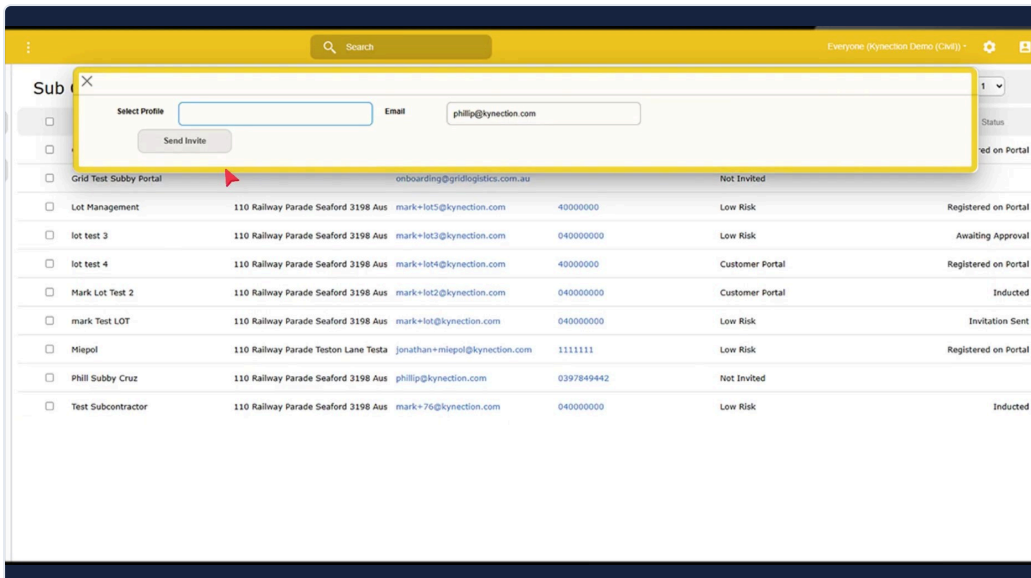
STEP 3 • 01:48 IN THE VIDEO

Review the register

Back on the register, each company now shows the portal type and status that configuration produced.

Invite them to a project

The invitation ties a company to a project and emails their nominated contact.

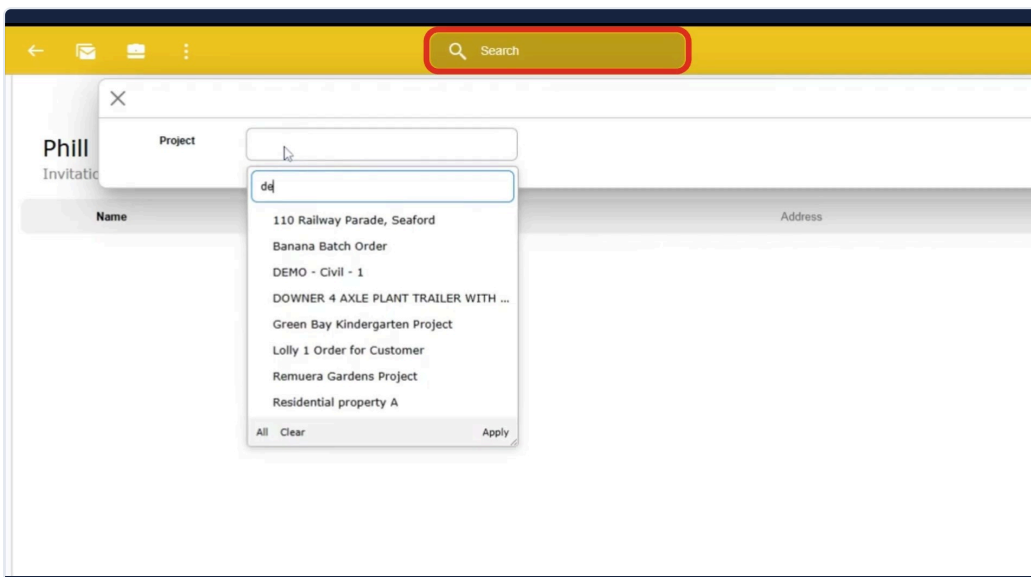


STEP 1 · 01:52 IN THE VIDEO

Send the invite

The invite dialog takes the profile to invite under and the contact's email address, then **Send Invite**.

CHAPTER 03 · STEP 1 OF 4



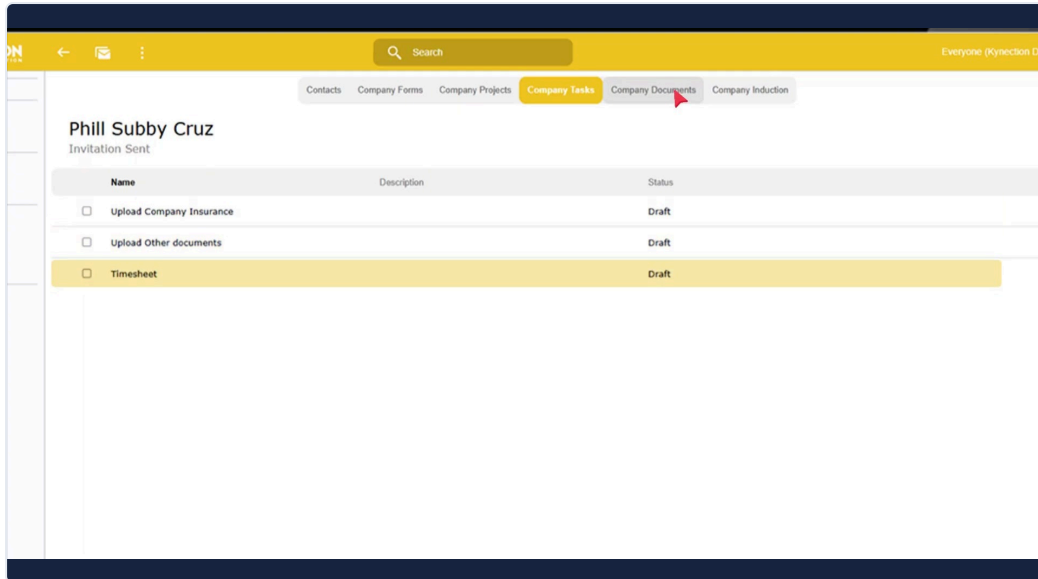
STEP 2 · 02:25 IN THE VIDEO

Pick the project

The project search narrows a long list to the job you are inviting them onto.

CHAPTER 03 · STEP 2 OF 4

Invite them to a project

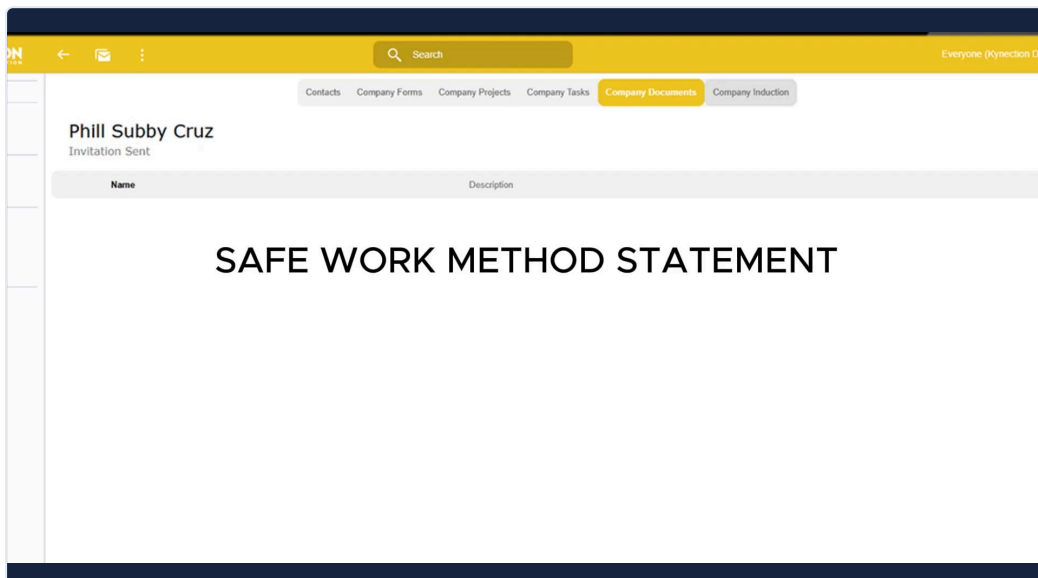


STEP 3 • 02:37 IN THE VIDEO

Check what is on file

Company documents show what has already been uploaded and what is still in draft, so you are not inviting a company that cannot yet be approved.

CHAPTER 03 • STEP 3 OF 4



STEP 4 • 02:48 IN THE VIDEO

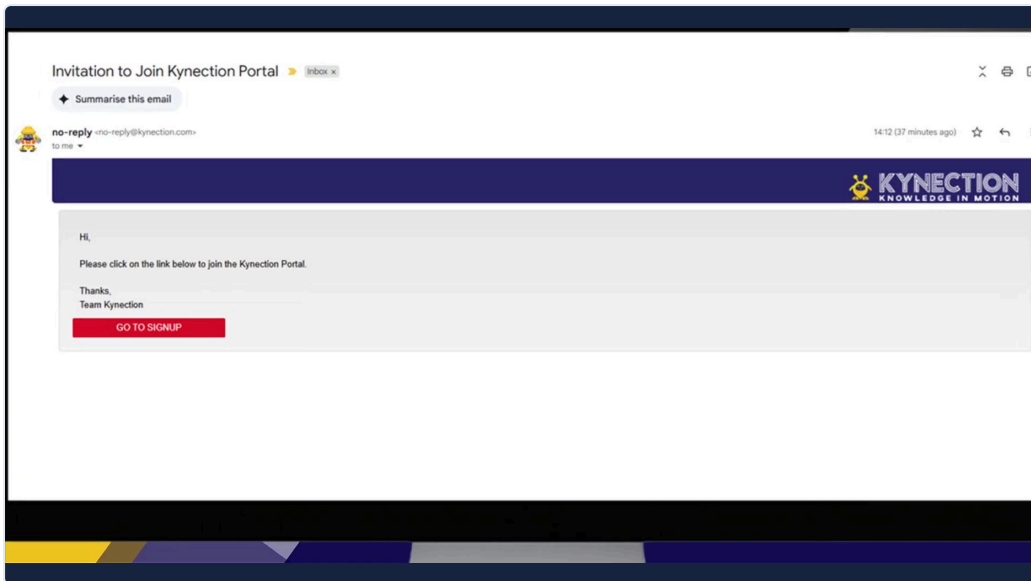
Review the attached documents

Documents such as safe work method statements attached against the company can be opened and checked.

CHAPTER 03 • STEP 4 OF 4

The subcontractor signs in

From the invitation email into their own portal account.

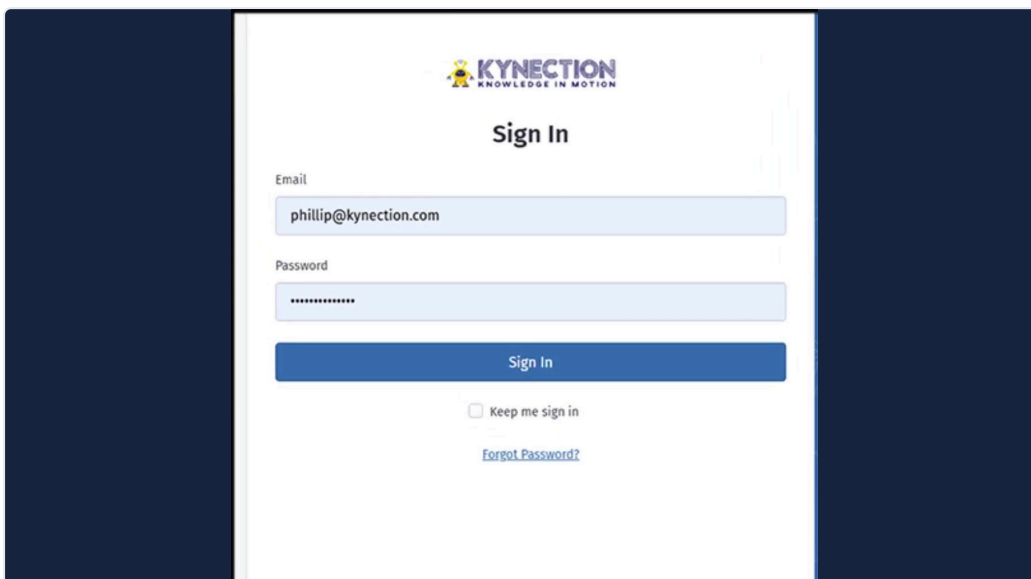


STEP 1 • 02:57 IN THE VIDEO

Open the invitation email

The subcontractor receives an **Invitation to Join Kynection Portal** email with a signup link.

CHAPTER 04 • STEP 1 OF 3



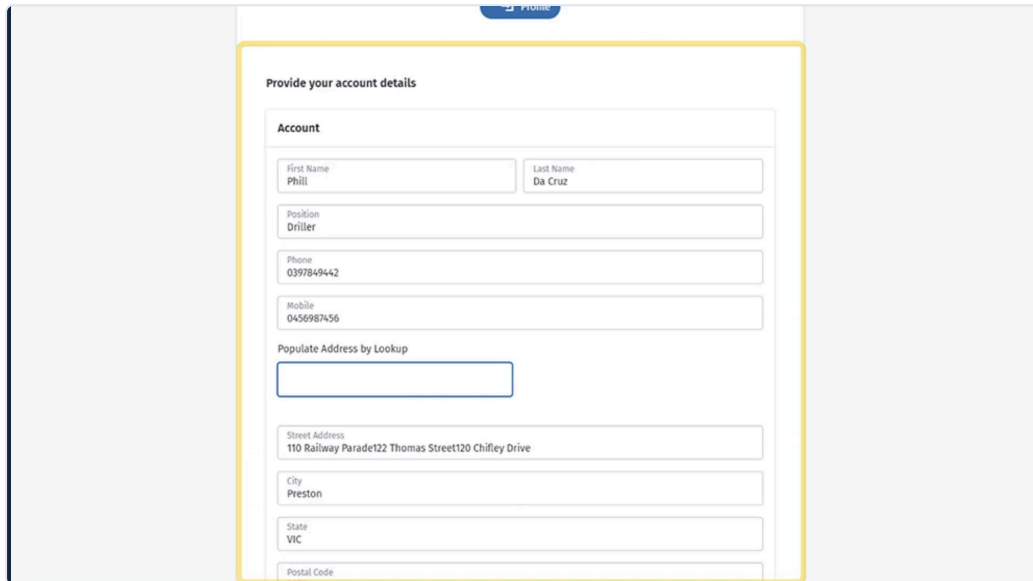
STEP 2 • 03:07 IN THE VIDEO

Sign in

The link opens the portal sign-in page.

CHAPTER 04 • STEP 2 OF 3

The subcontractor signs in



The screenshot shows a web form titled "Provide your account details" with a yellow border. The form is divided into two main sections: "Account" and "Address". The "Account" section includes fields for First Name (Phill), Last Name (Da Cruz), Position (Driller), Phone (0397849442), and Mobile (0456987456). The "Address" section includes a "Populate Address by Lookup" button, a Street Address field (110 Railway Parade122 Thomas Street120 Chilley Drive), a City field (Preston), a State field (VIC), and a Postal Code field.

STEP 3 • 03:17 IN THE VIDEO

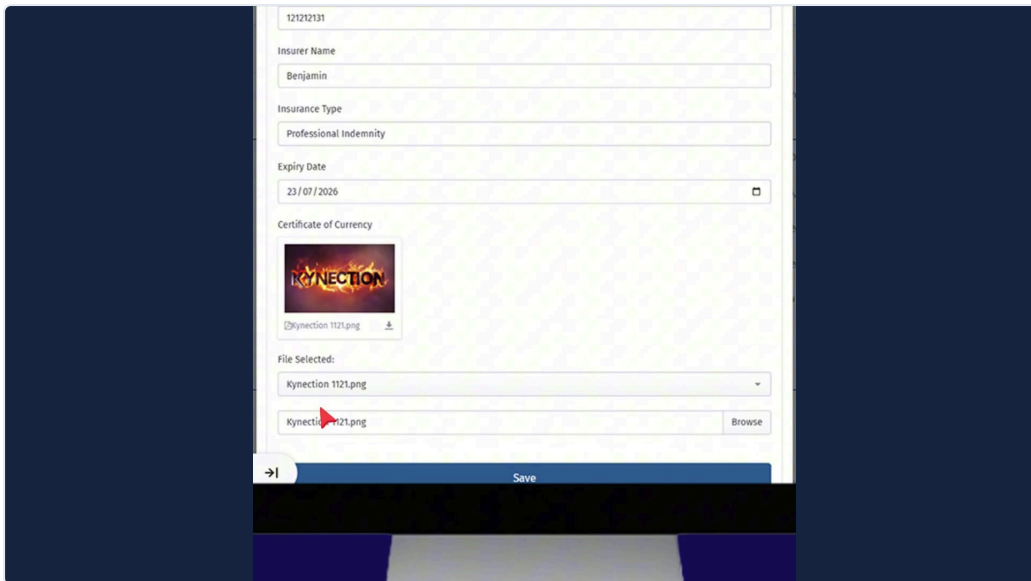
Provide the account details

Signup takes the account details for the person who will manage the portal on the company's behalf.

CHAPTER 04 • STEP 3 OF 3

Lodge the compliance records

Insurance, SWMS, chain of responsibility, safety data sheets and any sub-contractors of their own.

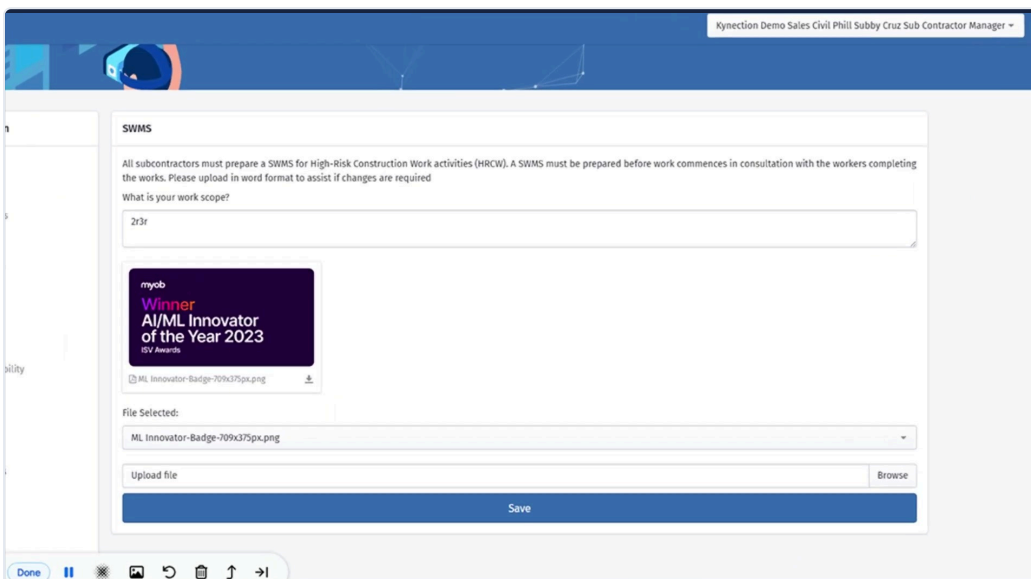


STEP 1 • 03:40 IN THE VIDEO

Add the insurance

Each policy takes the insurer name, insurance type and certificate of currency, with the evidence attached.

CHAPTER 05 • STEP 1 OF 6



STEP 2 • 03:52 IN THE VIDEO

Upload the documents

Safe work method statements and other supporting documents are uploaded against the company.

CHAPTER 05 • STEP 2 OF 6

Lodge the compliance records

61 Thames Promenade 214 Green Lane West 212 Riley Street 120 Chifley Drive Preston

Chain Of Responsibility

Does the scope of work require you to engage in Chain of Responsibility requirements?

Yes ☒ No ☐

All fields must be confirmed with Yes

Yes ☐ No ☒ Do you understand your obligations under National Heavy Vehicle chain of responsibility legislation?

Yes ☐ No ☒ Have you implemented arrangements to ensure all drivers are licensed?

Yes ☐ No ☒ Have you implemented arrangements to confirm driver fitness for work and maintain driver health and safety including managing driver fatigue?

Yes ☐ No ☒ Have you implemented arrangements to ensure driver do not consume drugs or alcohol which may affect their performance?

Yes ☐ No ☒ Have you implemented arrangements to maintain vehicle safety and ensure vehicles are fit for purpose?

Yes ☐ No ☒ Have you implemented arrangements to ensure safe driving practices are adopted by all drivers?

Yes ☐ No ☒ Have you implemented arrangements to ensure your drivers are trained in correct load restraint methods?

Yes ☐ No ☒ Have you implemented arrangements to ensure proper load restraint is undertaken for each load including covering loads during transport?

Yes ☐ No ☒ Have you implemented arrangements to ensure mass management to prevent overloading?

Yes ☐ No ☒ Have you implemented arrangements to ensure safe loading and unloading practices at client sites including preventing work at height when covering loads?

Yes ☐ No ☒ Have you implemented arrangements to prevent making demands of other parties in the Chain of Responsibility which would result in a breach of road transport laws?

STEP 3 • 03:59 IN THE VIDEO

Answer chain of responsibility

The questionnaire covers obligations under national heavy vehicle law, including driver licensing, fatigue, speed compliance, mass management and load restraint, answered yes or no.

CHAPTER 05 • STEP 3 OF 6

Kynecton Demo Sales Civil Phil Subby Cruz Sub Contractor Manager

Introduction

Does the scope of work require you to use potentially hazardous material on site?

Yes ☒ No ☐

Save

SDS Register

Show 50 entries

Search:

Employer	Product Name	Manufacturer	Hazard Classification	Expiry date
No data available in table				

Showing 0 to 0 of 0 entries

Previous Next

New Product Safety DataSheet

complete Induction

STEP 4 • 04:14 IN THE VIDEO

Register the safety data sheets

The SDS register records hazardous substances held, with their product and manufacturer detail.

CHAPTER 05 • STEP 4 OF 6

Lodge the compliance records

Kynection Demo Sales Civil Phill Subby Cruz Sub Contractor Manager

Phill Da Cruz
email: philip@kynection.com Phone number: 0397843642

Deactivate

Sub Companies

Does the scope of work require you to engage sub-companies?
☒ Yes ☐ No

Save

All Sub-Contractors must be certified

Show 50 entries

Sub-Contractor Name	ABN	Contact Name	Phone Number	Certificates Received
w121	121	121	1212	No

Showing 1 to 1 of 1 entries

Previous 1 Next

Add New Subcontractor

93 Steps Done

Help - Support - Privacy - Terms of Service

STEP 5 • 04:25 IN THE VIDEO

Declare your own sub-contractors

If the company engages sub-contractors itself, they are declared here with their contact and verification details.

CHAPTER 05 • STEP 5 OF 6

Kynection Demo Sales Civil Phill Subby Cruz Sub Contractor Manager

Phill Da Cruz

Company Induction

Company Profile
Insurance Policies
Code Compliance
SWMS
Chain of Responsibility
Plant
Safety Data Sheets
Team Members
Additional Information

Additional Forms

Bunbury vehicle Fire Suppression Commission

PEFS System Commissioning Report & Completion Certificate

Name of Client (span class="badge badge-danger">Required

Equipment being protected (make/model)

Equipment identification/serial number

Fire Hazard locations being protected

PEFS cylinder serial numbers

Discharge time

Equipment shutdown delay period

Additional remarks

System commissioned by

95 Steps Done

STEP 6 • 04:38 IN THE VIDEO

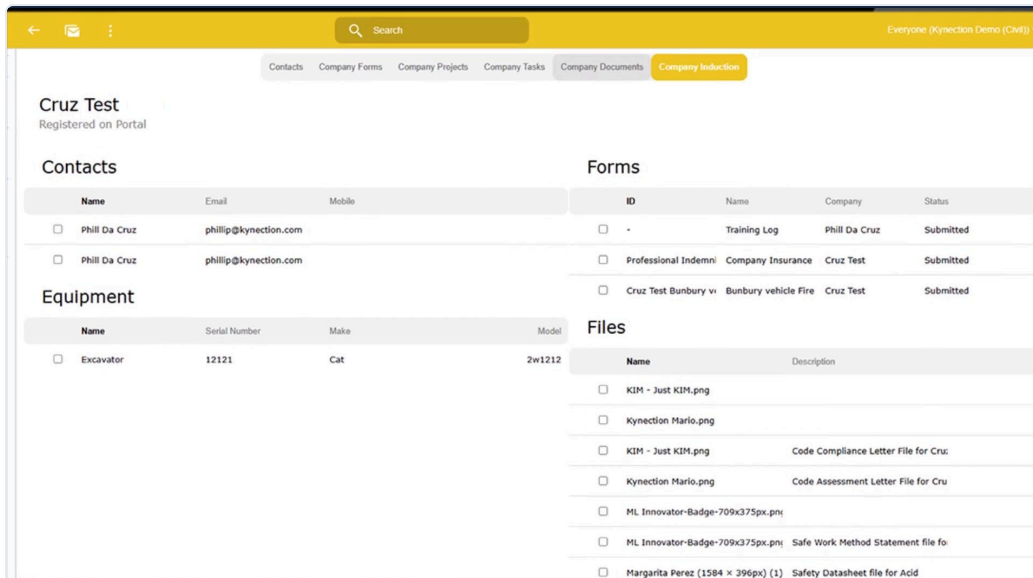
Complete the induction forms

The remaining induction forms are completed and the whole submission goes for approval.

CHAPTER 05 • STEP 6 OF 6

Review what came back

The head contractor checks compliance, then sees the project view the subcontractor gets.

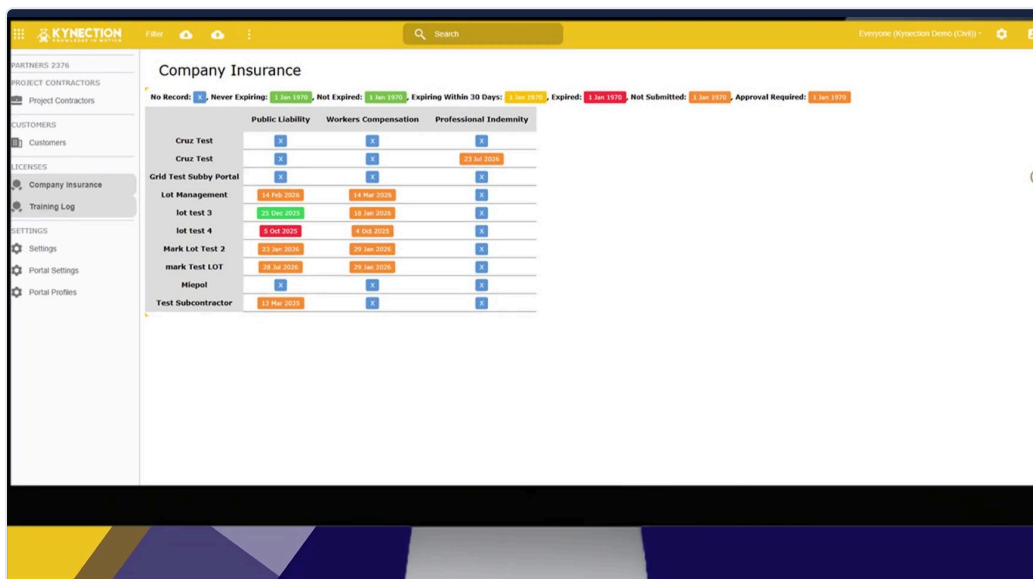


STEP 1 • 04:49 IN THE VIDEO

Open the company record

The record shows the company's contacts, forms, equipment and files in one place.

CHAPTER 06 • STEP 1 OF 5



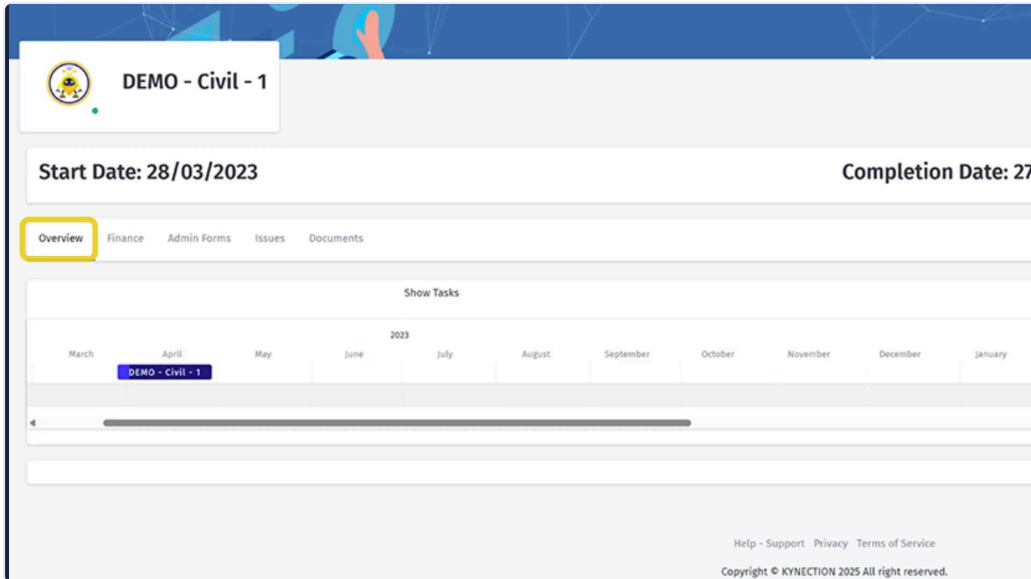
STEP 2 • 05:02 IN THE VIDEO

Check the insurance matrix

Insurance status is a colour-coded matrix across public liability, workers compensation and professional indemnity, flagging no records, never expiring, not expired, expiring within 30 days, expired, not submitted and approval required.

CHAPTER 06 • STEP 2 OF 5

Review what came back

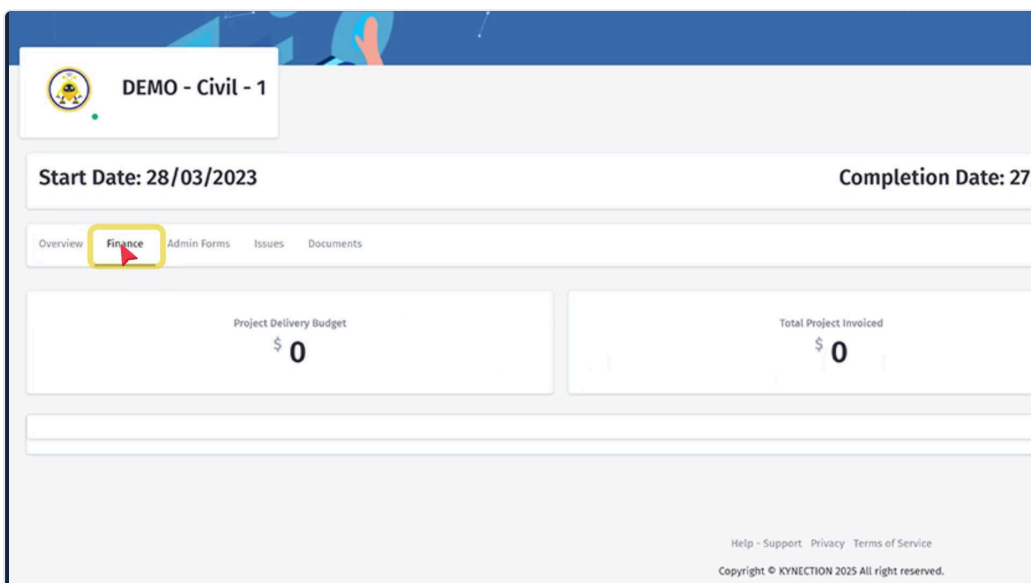


STEP 3 • 05:25 IN THE VIDEO

Open the assigned project

Projects the subcontractor has been invited to open with their start and completion dates.

CHAPTER 06 • STEP 3 OF 5



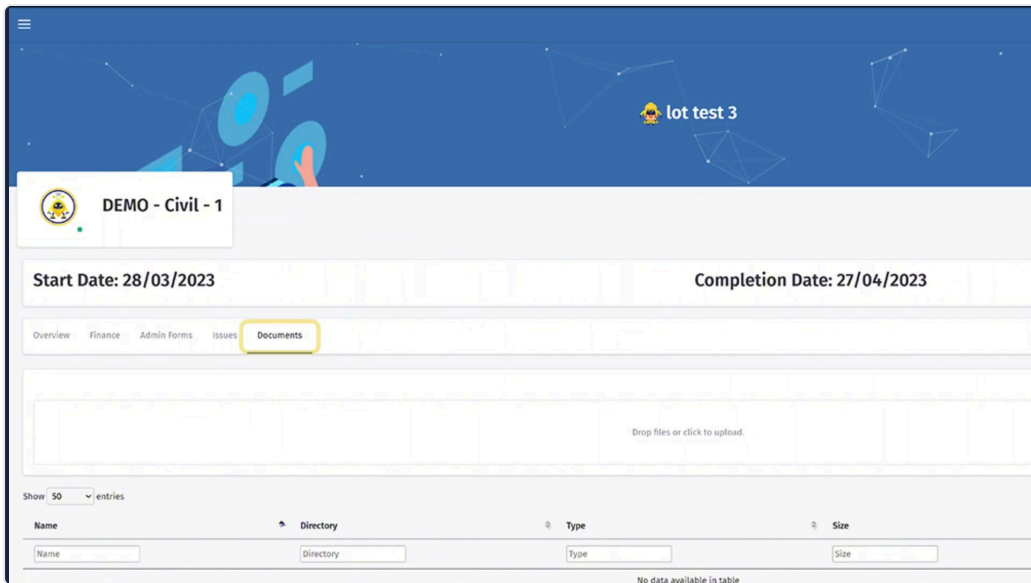
STEP 4 • 05:29 IN THE VIDEO

Read the finance summary

The project view carries the revenue budget and total invoiced against it.

CHAPTER 06 • STEP 4 OF 5

Review what came back



STEP 5 • 05:41 IN THE VIDEO

Reach forms, issues and documents

Admin forms, issues and project documents are all reachable from the subcontractor's project view.

CHAPTER 06 • STEP 5 OF 5