

Edit Company

Name: Phill Subby Cruz

Web Site:

Phone: 0397849442

Email: phillip@kynection.com

ACN:

Address:

Street: 110 Railway Parade

City: Seaford

State: VIC

Zipcode: 3198

Position:

Owner: Ky Admin

Companies:

More

Sub Contractor Portal

Subcontractors

All Clear Apply

sub

Region:

Note:



KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • SUBCONTRACTOR PORTAL • PART 2

Configure Subcontractor *Portal Access*

Setting a subcontractor up before they are invited anywhere: granting the portal role on their contact record, then configuring what their company is required to provide.

3 CHAPTERS

1 MIN 44 SEC

SUBCONTRACTOR PORTAL

WEB USERS • CONTRACT ADMIN

FEATURE GUIDE • 1 MIN 44 SEC

What this feature covers

Three stages, eight steps: assigning the portal role, opening the company, and setting its requirements.

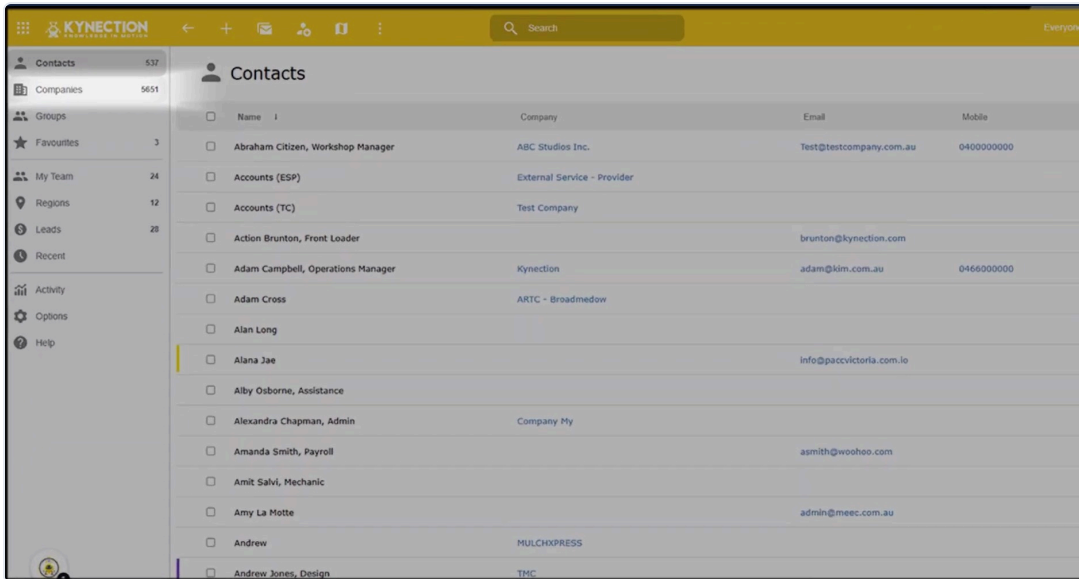
CH 01	Assign the portal role Start on the subcontractor's contact record.	00:00-00:46
CH 02	Open the company Companies are managed separately from the contacts inside them.	00:46-01:10
CH 03	Set the required forms What the subcontractor must complete before they are approved.	01:10-01:44

- **The role sits on the contact.** Portal access is granted to a person, not to a company, so each company needs a nominated portal user.
- **Requirements are per company.** Only ask for what applies, so a labour-only trade is not chasing plant registrations.
- **The invitation email is editable.** Its subject and body are configured here rather than being fixed.

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.

Assign the portal role

Start on the subcontractor's contact record.

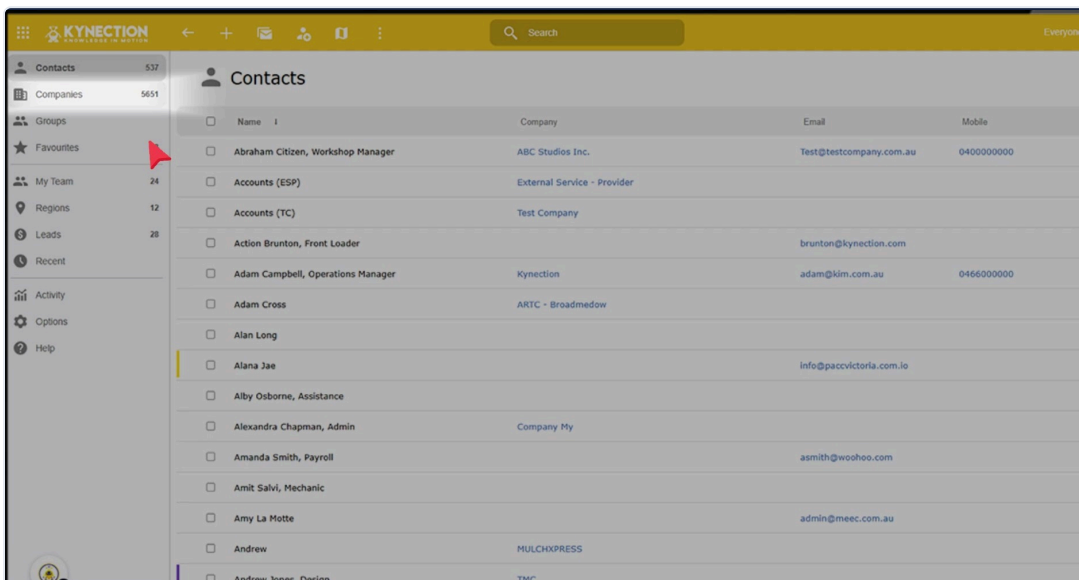


STEP 1 • 00:13 IN THE VIDEO

Open Contacts

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

CHAPTER 01 • STEP 1 OF 4



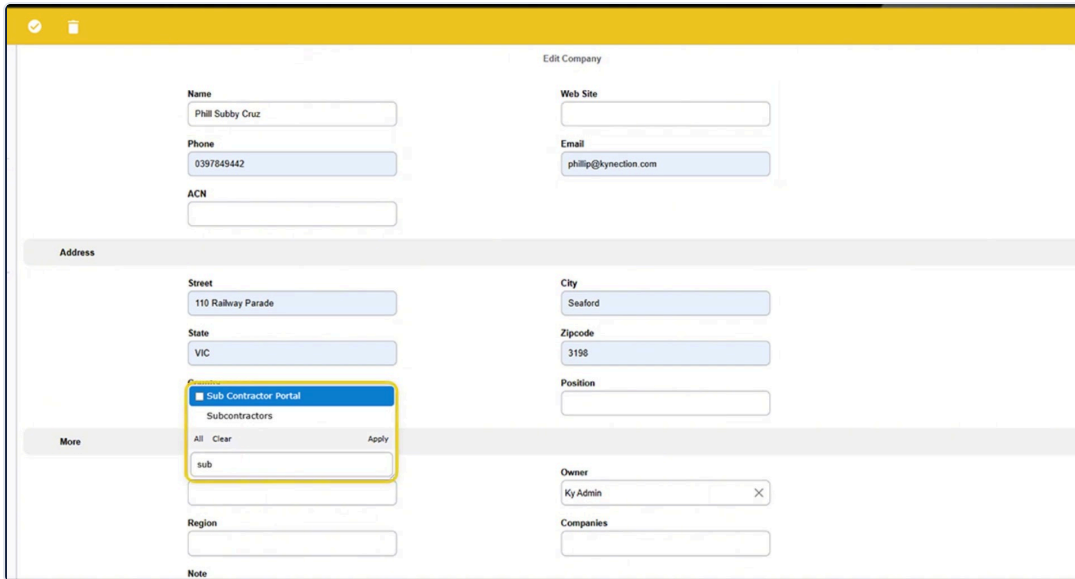
STEP 2 • 00:15 IN THE VIDEO

Find the subcontractor

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

CHAPTER 01 • STEP 2 OF 4

Assign the portal role



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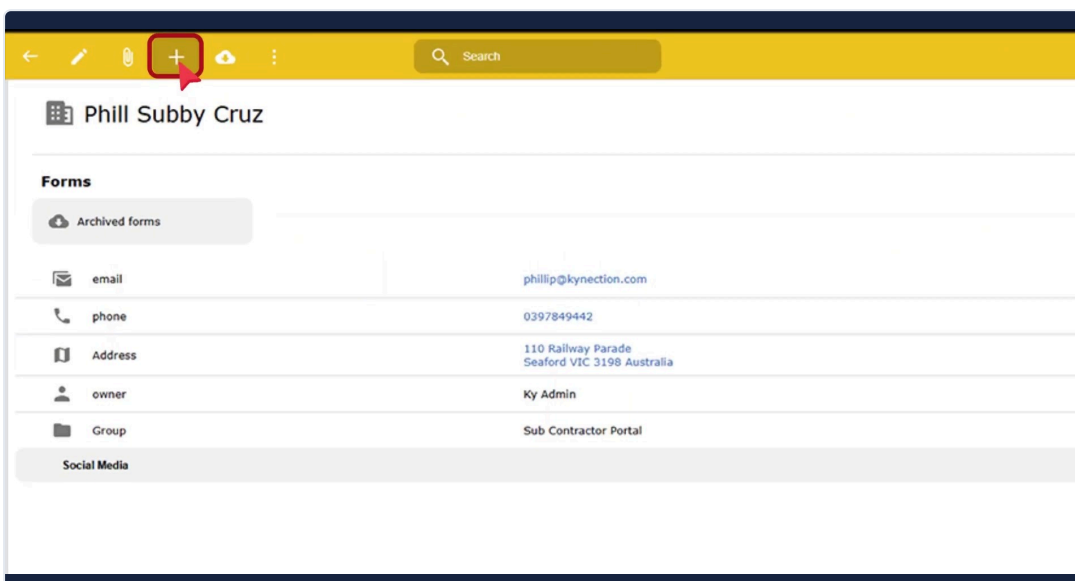
Note:

STEP 3 • 00:24 IN THE VIDEO

Set the access

Set the contact's access to **Sub Contractor Portal**, alongside their name, job title, ACN, email, address and region.

CHAPTER 01 • STEP 3 OF 4



Phill Subby Cruz

Forms

Archived forms

email	philip@kynection.com
phone	0397849442
Address	110 Railway Parade Seaford VIC 3198 Australia
owner	Ky Admin
Group	Sub Contractor Portal

Social Media

STEP 4 • 00:38 IN THE VIDEO

Confirm the details

The saved record shows the email, phone, address and the **Sub Contractor Portal** group.

CHAPTER 01 • STEP 4 OF 4

Open the company

Companies are managed separately from the contacts inside them.

☐	Name	Address	Email	Phone	Profile	Status
☐	Cruz Test	61 Thames Promenade 214 Green Lan	philip@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	philip@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 list

Sub Contractor Manager Companies lists each company with its contact, portal type, status and risk rating.

CHAPTER 02 • STEP 1 OF 2

Sub Contractor Manager

Name
Customer Portal

Employee Licenses Required

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

Chain of Responsibility Required

- ☒ 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

Insurance

Code Compliance

SWMS

Chain of Responsibility

Hant

SDS

Team

Custom Forms

STEP 2 • 01:03 IN THE VIDEO

Configure access and responsibilities

Against the company you set what access it has and what it is responsible for providing.

CHAPTER 02 • STEP 2 OF 2

Set the required forms

What the subcontractor must complete before they are approved.

The screenshot shows the 'Configuration For Progress Claim' form in the KYNECTION system. The form is divided into several sections:

- Project Progress Claim Subform Template:** Includes fields for 'Add Claim', 'Product Field', 'Claim(F7)', 'This Claim Total \$ Field', and 'Claim Total(F4)'.
- Progress Claim Button Field("):** Includes a field for 'Add New Claim(F30)'.
- Quantity Field:** Includes a field for 'Claim No (F5)'.
- Total Field:** Includes a field for 'Claim Total (F6)'.
- Email List:** A text input field.
- Email Subject:** A text input field with the value 'Invitation to Join Kynecton Portal'.
- Email Body:** A rich text editor containing the text: 'Hi, Please click on the link below to join the Kynecton Portal. Thanks, Team Kynecton'.
- Disable Outgoing Emails For Testing:** A checkbox.
- Install:** A button.
- Select Server to Send Invites to:** A dropdown menu.

STEP 1 • 01:23 IN THE VIDEO

Configure the claim template

Progress claim settings cover the subform template, progress claim, quantity field and class total field, along with the invitation email subject and body.

CHAPTER 03 • STEP 1 OF 2

The screenshot shows the 'Public Liability/Workers Compensation/Professional Indemnity' form in the KYNECTION system. The form is divided into several sections:

- Update Insurance Type:** Includes fields for 'License Date Of Assessment Field', 'License Photo Field', 'Company Group', 'Cross Check Against', 'License Date Of Expiry Field', 'Raised Against', and 'Expiry Warning (Days)'.
- Approval Required:** A checkbox with the value 'Approved Req'.
- Missing Photo Warning Needed:** A checkbox with the value '1 Jan 1979'.
- Training Log:** A dropdown menu with the value 'Config'.
- License Form:** A text input field with the value 'Training Log'.
- License Type Field:** A text input field with the value '(F1)Certificate/License/Ticket Class or Type:'.
- Certificate/License/Ticket Class Or Type:** A text input field with the value '(F1)Certificate/License/Ticket Class or Type:'.
- Update Certificate/License/Ticket Class Or Type:** A button.

STEP 2 • 01:40 IN THE VIDEO

Select the compliance items

Training logs, licence competency and approval requirements are selected here, then the configuration is saved.

CHAPTER 03 • STEP 2 OF 2

Where to go next

This guide covers one part of the module. The rest of the series covers it end to end.

NEXT UP - Subcontractor 03

Invite a subcontractor to a project

BACK TO Subcontractor 01

Use the Subcontractor Portal (module overview)

THE REST OF THE SUBCONTRACTOR PORTAL

Ask your Kynecton account manager for the other guides in this series

MORE IN THIS MODULE

Subcontractor 01 Use the Subcontractor Portal (module overview)

Subcontractor 03 Invite a subcontractor to a project

Subcontractor 04 Complete induction and compliance

Subcontractor 05 Review compliance and project access
