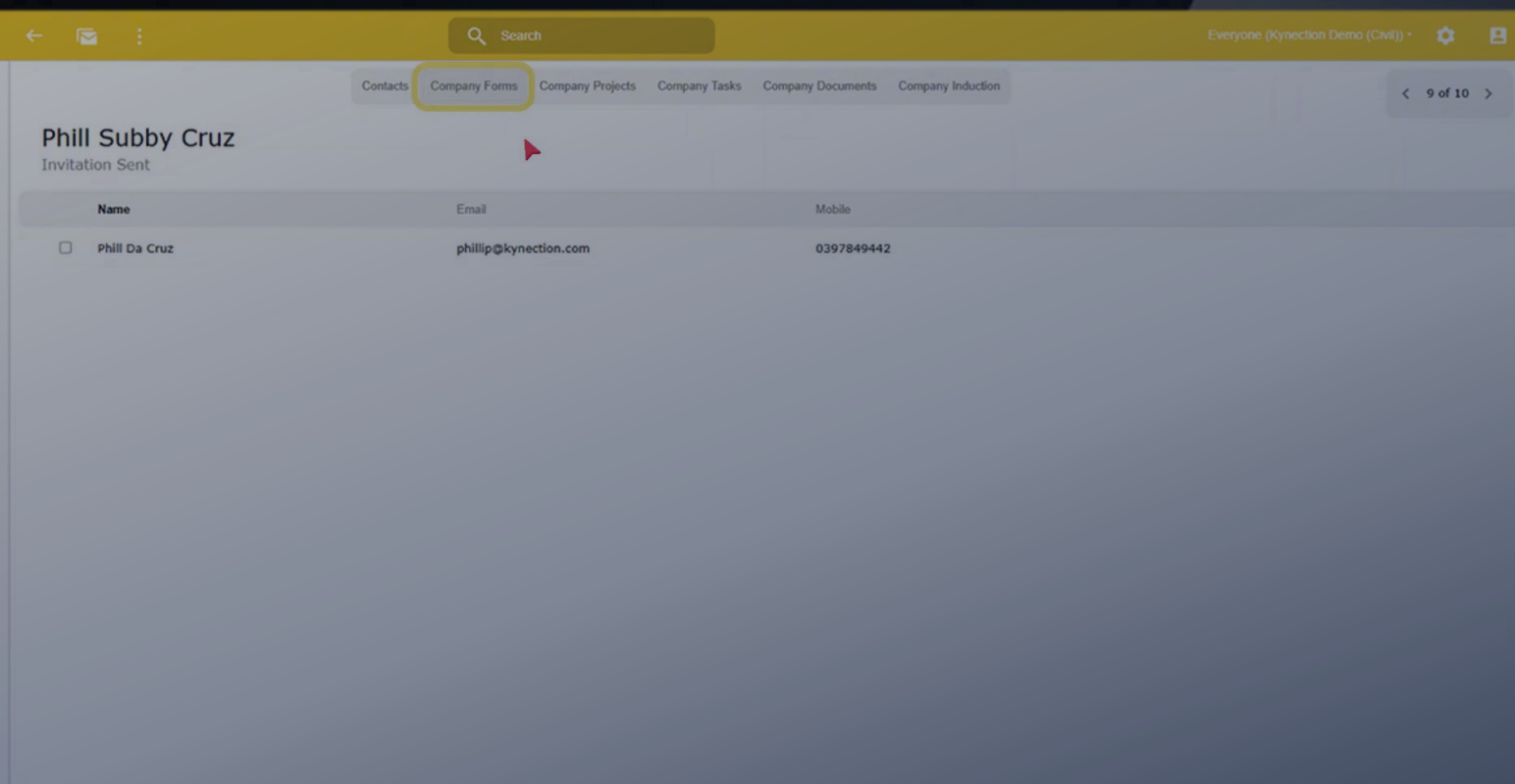




FEATURE GUIDE

KYNECTION • SUBCONTRACTOR PORTAL • PART 3

Invite a Subcontractor *to a Project*

Putting a configured subcontractor onto a live project: finding the company, reviewing what they have on file, searching for the right project, and sending the invitation.

3 CHAPTERS

1 MIN 14 SEC

SUBCONTRACTOR PORTAL

WEB USERS • CONTRACT ADMIN

What this feature covers

Three stages, eight steps: finding the company, starting the invitation, and reviewing what it asks for.

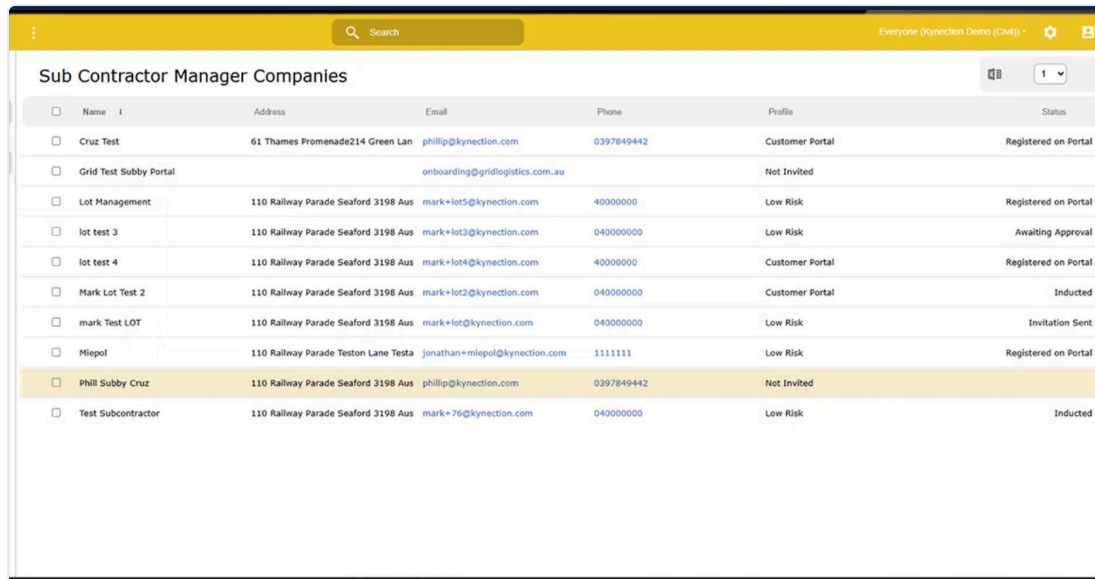
CH 01	Find the company Start from the subcontractor company register.	00:00–00:36
CH 02	Start the invitation The invitation is raised from the company's projects tab.	00:36–00:58
CH 03	Review and send Check what the invitation asks for before it goes out.	00:58–01:14

- **Check the file first.** The company's forms and documents show what is already lodged, so you are not inviting someone who cannot yet be approved.
- **Search rather than scroll.** The project filter matters on a long project list.
- **You can see what they will see.** Tasks, documents and inductions attached to the invitation are listed before it goes.

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.

Find the company

Start from the subcontractor company register.



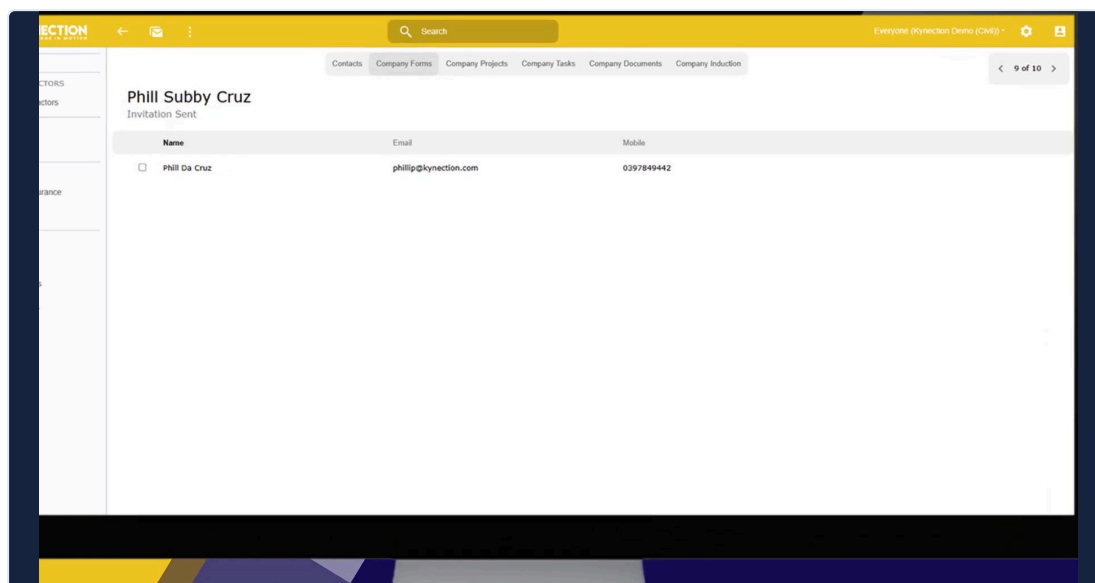
☐	Name	Address	Email	Phone	Profile	Status
☐	Cruz Test	61 Thames Promenade 214 Green Lan	phillip@kynection.com	0397849442	Customer Portal	Registered on Portal
☐	Grid Test Subby Portal		onboarding@gridlogistics.com.au		Not Invited	
☐	Lot Management	110 Railway Parade Seaford 3198 Aus	mark+lot5@kynection.com	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 1 • 00:04 IN THE VIDEO

Open the companies list

Sub Contractor Manager Companies lists each company with its status and risk rating.

CHAPTER 01 • STEP 1 OF 3



Kynection					
Search			Everyone (Kynection Demo (Civ))		
Contacts Company Forms Company Projects Company Tasks Company Documents Company Induction					
9 of 10					
Phill Subby Cruz					
Invitation Sent					
Name	Email	Mobile			
☐ PHIL Da Cruz	phillip@kynection.com	0397849442			

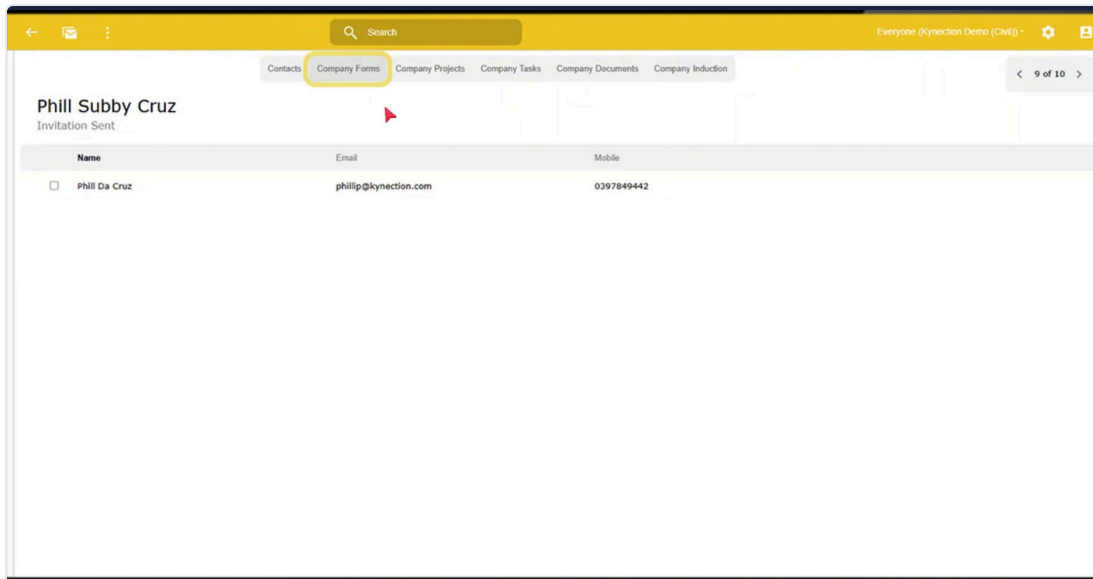
STEP 2 • 00:13 IN THE VIDEO

Open the company record

The record opens with tabs for company forms, details, documents, insurance and selection.

CHAPTER 01 • STEP 2 OF 3

Find the company



STEP 3 • 00:21 IN THE VIDEO

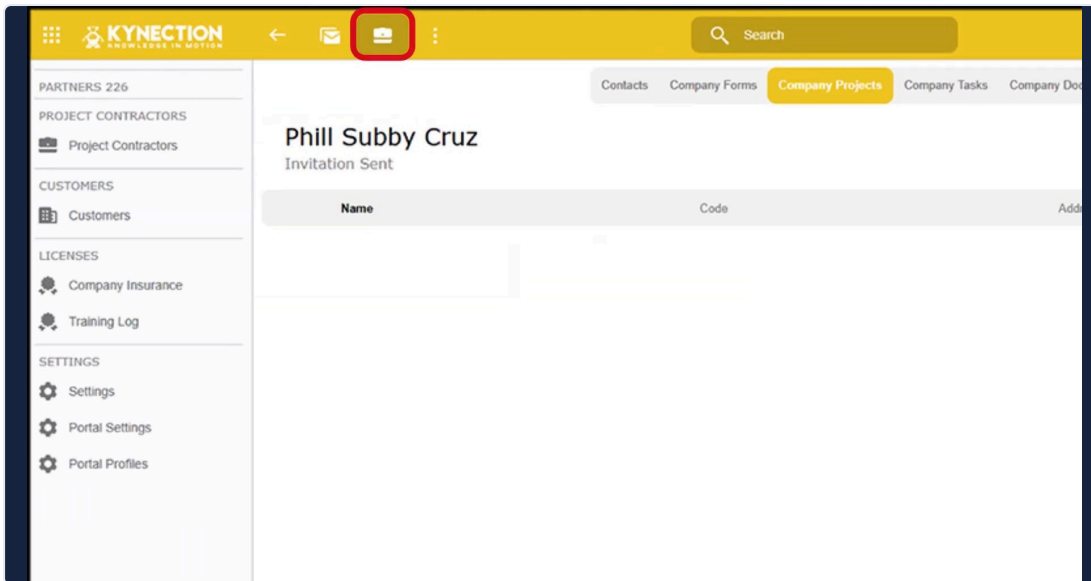
Review the contacts

Contacts registered against the company list with their email and role.

CHAPTER 01 • STEP 3 OF 3

Start the invitation

The invitation is raised from the company's projects tab.

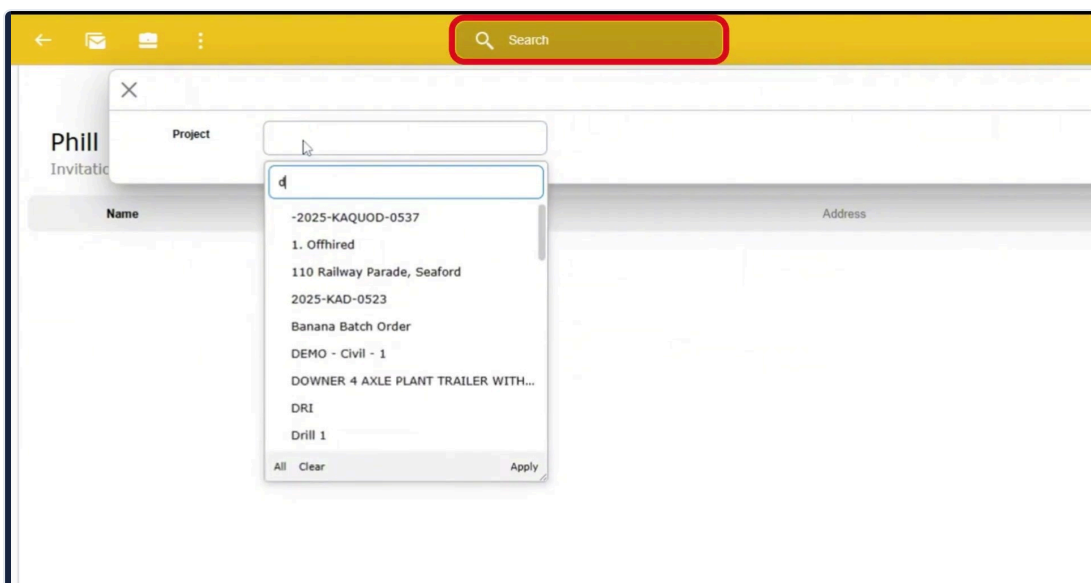


STEP 1 • 00:34 IN THE VIDEO

Open the projects tab

The projects tab shows every project the subcontractor has been invited to.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 00:41 IN THE VIDEO

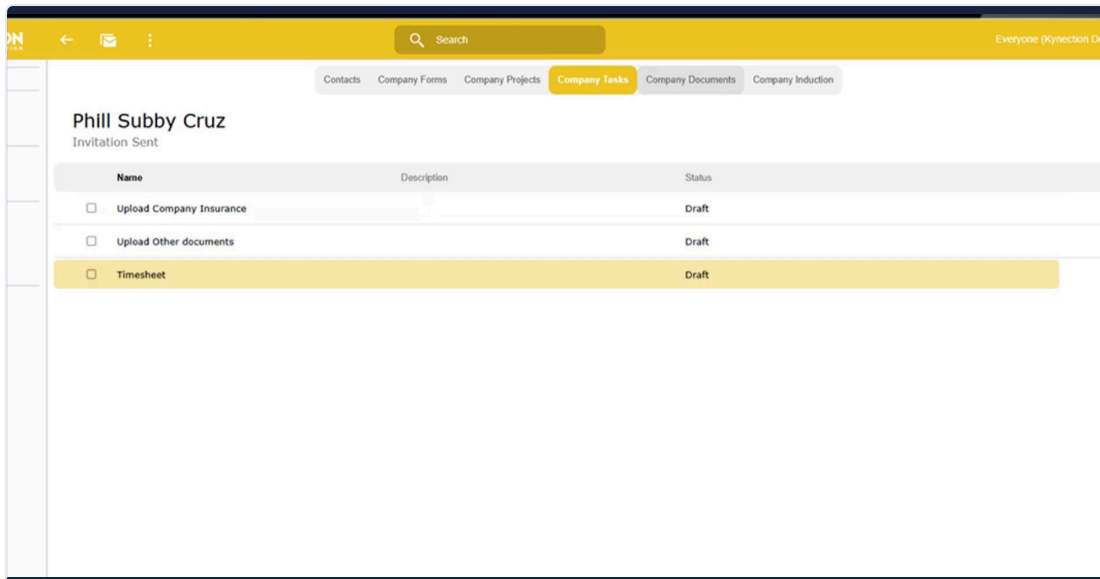
Search for the project

The search filter narrows a long project list to the one you want.

CHAPTER 02 • STEP 2 OF 2

Review and send

Check what the invitation asks for before it goes out.

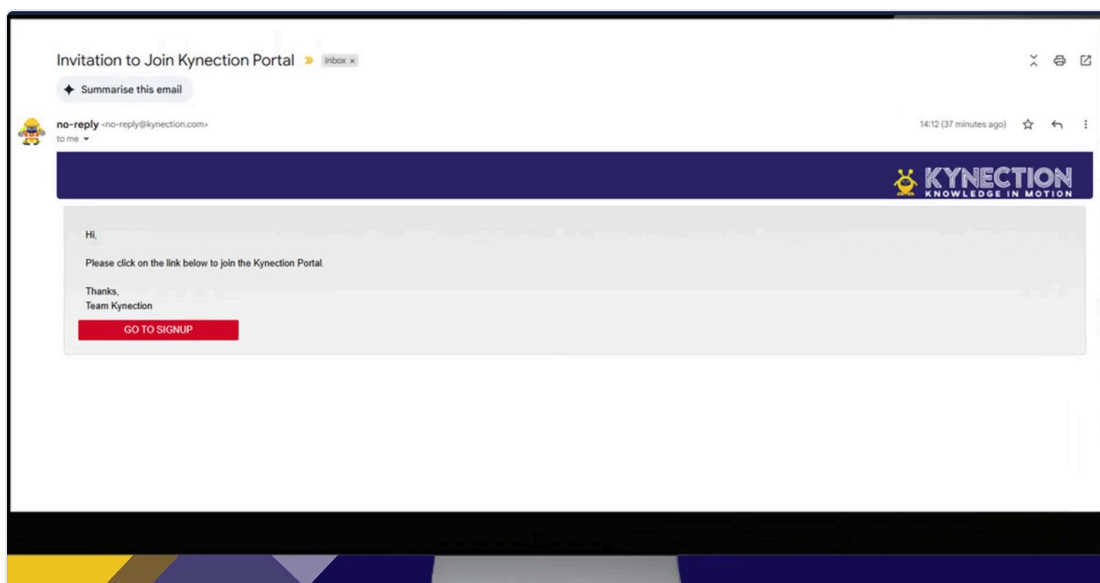


STEP 1 • 00:52 IN THE VIDEO

Check the documents

Company documents list what has been uploaded and what is still in draft.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 01:12 IN THE VIDEO

Send the invitation

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

CHAPTER 03 • STEP 2 OF 2

NEXT

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 04

Complete induction and compliance

BACK TO Subcontractor 02

Configure subcontractor portal access

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 02 **Configure subcontractor portal access**

Subcontractor 04 **Complete induction and compliance**

Subcontractor 05 **Review compliance and project access**
