

What this feature covers

Three stages, eight steps: the company record, the insurance status matrix, and the project view.

CH 01	Open the company record	00:00–00:14
	Everything the subcontractor has lodged, in one place.	

CH 02	Read the insurance status	00:14–00:37
	Status is colour coded across every policy and every company.	

CH 03	Check the project view	00:37–01:07
	What an approved subcontractor sees for the projects they are on.	

- **The matrix is the fastest check.** Colour tells you what is expiring, expired, unsubmitted or awaiting approval without opening a single record.
- **Approval required is not the same as expired.** A policy can be current but still waiting on someone at your end.
- **They see the project too.** An approved subcontractor gets schedule, finance, forms, issues and documents for the projects they are on.

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.
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Open the company record

Everything the subcontractor has lodged, in one place.

Cruz Test
Registered on Portal

Contacts

Name	Email	Mobile
☐ Phillip Da Cruz	phillip@kynecton.com	
☐ Phillip Da Cruz	phillip@kynecton.com	

Equipment

Name	Serial Number	Make	Model
☐ Excavator	12121	Cat	2w1212

Forms

ID	Name	Company	Status
☐ -	Training Log	Phill Da Cruz	Submitted
☐ Professional Indemnity	Company Insurance	Cruz Test	Submitted
☐ Cruz Test Bunbury v.	Bunbury vehicle Fire	Cruz Test	Submitted

Files

Name	Description
☐ KIM - Just KIM.png	
☐ Kynecton Mario.png	
☐ KIM - Just KIM.png	Code Compliance Letter File for Cruz
☐ Kynecton Mario.png	Code Assessment Letter File for Cruz
☐ ML Innovator-Badge-709x375px.png	
☐ ML Innovator-Badge-709x375px.png	Safe Work Method Statement file for
☐ Margarita Perez (1584 x 396px) (1)	Safety Datasheet file for Acid

STEP 1 • 00:03 IN THE VIDEO

Read the company record

The record shows contacts, forms, equipment and files against the company.

CHAPTER 01 • STEP 1 OF 2

Company Insurance

No Record: ☒ Never Expiring: 1 Jan 1970 Not Expired: 1 Jan 1970 Expiring Within 30 Days: 1 Jan 1970 Expired: 1 Jan 1970 Not Submitted: 1 Jan 1970 Approval Required: 1 Jan 1970

	Public Liability	Workers Compensation	Professional Indemnity
Cruz Test	☒	☒	☒
Cruz Test	☒	☒	23 Jul 2026
Grid Test Subby Portal	☒	☒	☒
Lot Management	14 Feb 2026	14 Mar 2026	☒
lot test 3	25 Dec 2025	18 Jan 2026	☒
lot test 4	5 Oct 2025	4 Oct 2025	☒
Mark Lot Test 2	23 Jan 2026	29 Jan 2026	☒
mark Test LOT	28 Jul 2026	29 Jan 2026	☒
Miepol	☒	☒	☒
Test Subcontractor	13 Mar 2025	☒	☒

STEP 2 • 00:10 IN THE VIDEO

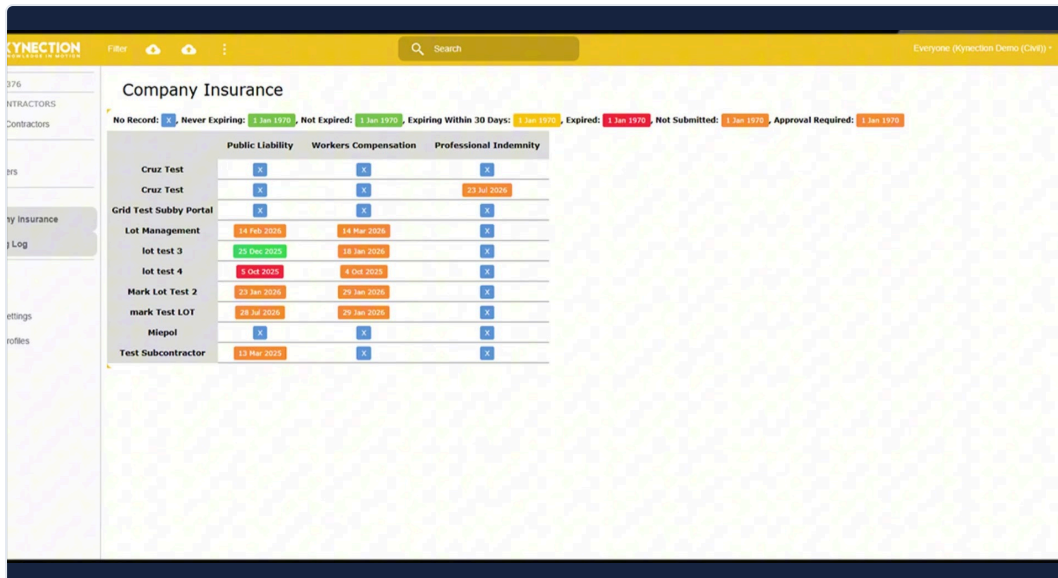
Open company insurance

Insurance opens as a matrix across the policy types held.

CHAPTER 01 • STEP 2 OF 2

Read the insurance status

Status is colour coded across every policy and every company.



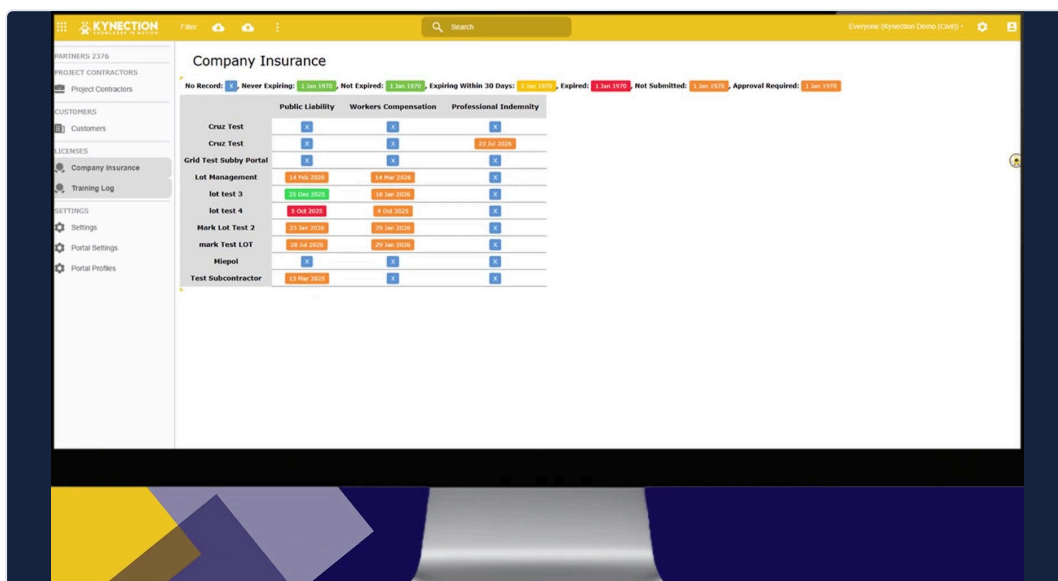
	Public Liability	Workers Compensation	Professional Indemnity
Cruz Test	No Record	No Record	No Record
Cruz Test	No Record	No Record	Expiring Within 30 Days
Grid Test Subby Portal	No Record	No Record	No Record
Lot Management	Not Expired	Not Expired	No Record
lot test 3	Never Expiring	Not Expired	No Record
lot test 4	Never Expiring	Not Expired	No Record
Mark Lot Test 2	Not Expired	Not Expired	No Record
mark Test LOT	Not Expired	Not Expired	No Record
Miepol	No Record	No Record	No Record
Test Subcontractor	Not Expired	No Record	No Record

STEP 1 • 00:20 IN THE VIDEO

Read the status colours

The matrix flags no records, never expiring, not expired, expiring within 30 days, expired, not submitted and approval required, across public liability, workers compensation and professional indemnity.

CHAPTER 02 • STEP 1 OF 2



	Public Liability	Workers Compensation	Professional Indemnity
Cruz Test	No Record	No Record	No Record
Cruz Test	No Record	No Record	Expiring Within 30 Days
Grid Test Subby Portal	No Record	No Record	No Record
Lot Management	Not Expired	Not Expired	No Record
lot test 3	Never Expiring	Not Expired	No Record
lot test 4	Never Expiring	Not Expired	No Record
Mark Lot Test 2	Not Expired	Not Expired	No Record
mark Test LOT	Not Expired	Not Expired	No Record
Miepol	No Record	No Record	No Record
Test Subcontractor	Not Expired	No Record	No Record

STEP 2 • 00:26 IN THE VIDEO

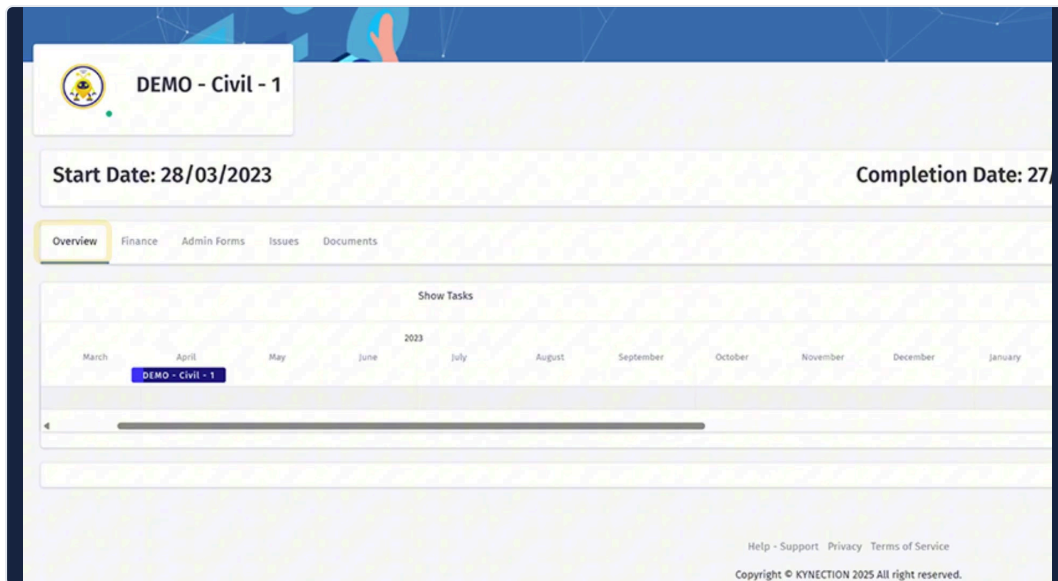
Scan across companies

Reading down a column shows every company's position on one policy type, which is how a fleet-wide gap gets spotted.

CHAPTER 02 • STEP 2 OF 2

Check the project view

What an approved subcontractor sees for the projects they are on.

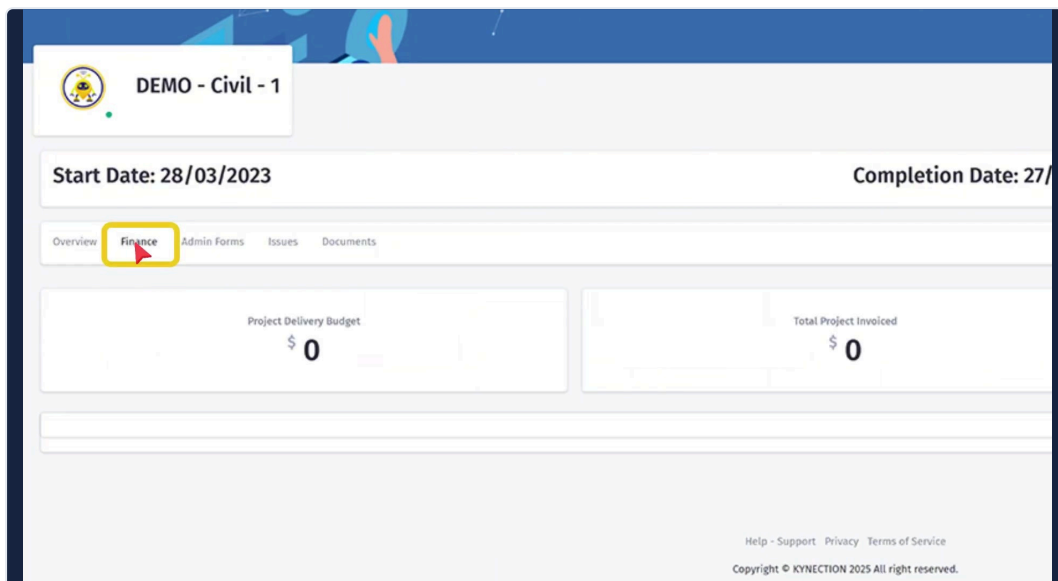


STEP 1 • 00:40 IN THE VIDEO

Open the assigned project

The project shows its start and completion dates with its tabs across the top.

CHAPTER 03 • STEP 1 OF 4



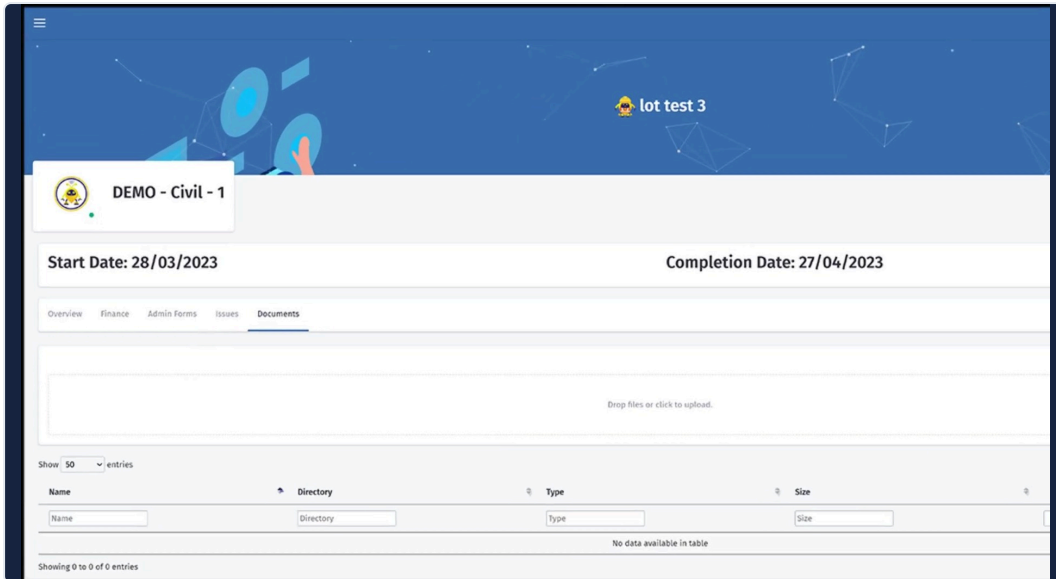
STEP 2 • 00:44 IN THE VIDEO

Read the finance summary

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

CHAPTER 03 • STEP 2 OF 4

Check the project view

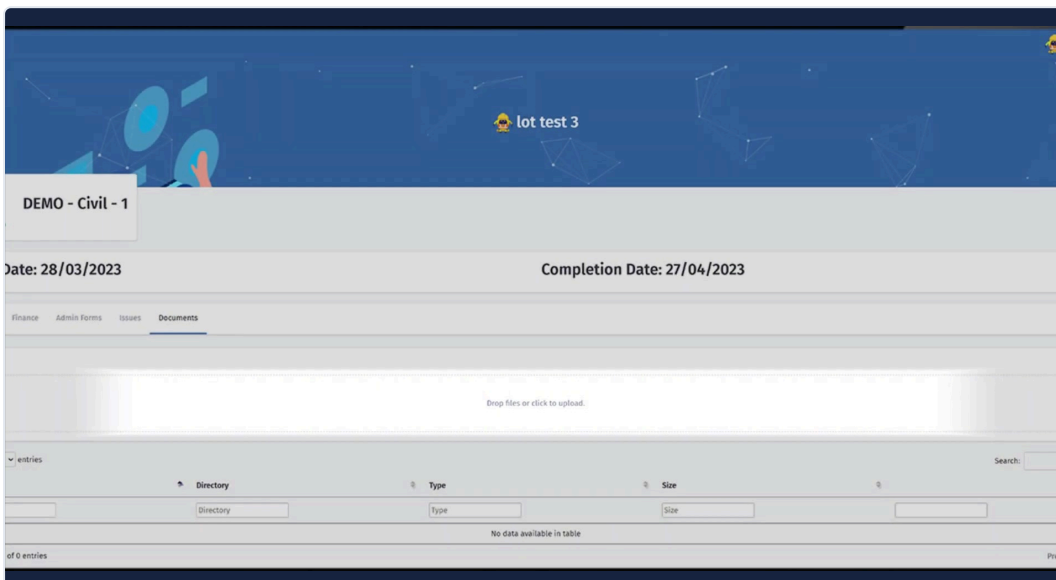


STEP 3 • 00:54 IN THE VIDEO

Open the documents

Project documents are listed for the subcontractor to work from.

CHAPTER 03 • STEP 3 OF 4



STEP 4 • 01:01 IN THE VIDEO

Check forms and issues

Admin forms and issues are reachable from the same project view.

CHAPTER 03 • STEP 4 OF 4

NEXT

Where to go next

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

BACK TO Subcontractor 04

Complete induction and compliance

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 03 **Invite a subcontractor to a project**

Subcontractor 04 **Complete induction and compliance**
