

Creating a subcontractor user account

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If you'd like your subcontractors to be able to log into your account to view bookings allocated to them, or if you'd like them to be able to accept, uplift and offload bookings a user account must be created for them. Creating subcontractor user accounts is the same as creating an internal user, except the subcontractor's company will be selected in the **company name** drop down.

1. Open the **Super User** menu
2. Click the **Create User** option to open the **New User** screen
3. Enter the **user name** they will be logging in with
4. Enter their **full name**
5. Enter their **password**, which must be 6 characters or more
6. Confirm their **password**
7. Optionally enter their **position** at their company
8. Optionally enter their **email address**
9. Select the subcontractor they belong to from the **Company Name** drop down list
10. Optionally supply their **phone** and **mobile** number
11. Click **Save** to continue to the **User Details** screen where you can assign roles and tasks

Assigning subcontractor user roles and tasks

Assigning subcontractor user roles and tasks is the same as assigning them to an internal user, except their roles and tasks are different and depots do not need to be assigned.

1. Select the roles you wish to assign
2. click the role's **update** button to save your role changes
3. Select a role from the **role drop down** in the tasks panel
4. Check / Uncheck the **tasks** you wish to assign/ deassign

5. Click the Task's **update** button to save your task changes
6. Repeat steps 3 to 5 until you are done

iCOSLIVE User Details

User Name: Full Name: e-mail: Position:

Company: Phone: Mobile: Depots:

Roles

- ☐ Financials
- ☒ Transport Contractor
- ☐ Reporting

Update

Tasks

Transport Contr

- ☐ Dispatch Screen
- ☐ Job Accept
- ☐ Job PUP DEL
- ☐ Show Filter By Vehicle
- ☐ Utilisation Screen

Update

☐ --- ALL ---

- ☐ auckland DEPOT
- ☐ Hamilton DEPOT
- ☐ TAURANGA DEPOT

Update

New User

Modify User

i Information on each subcontractor role and task can be found in the following articles

Preview