Contractor Guide: Invite other Users to your SpyderFlow

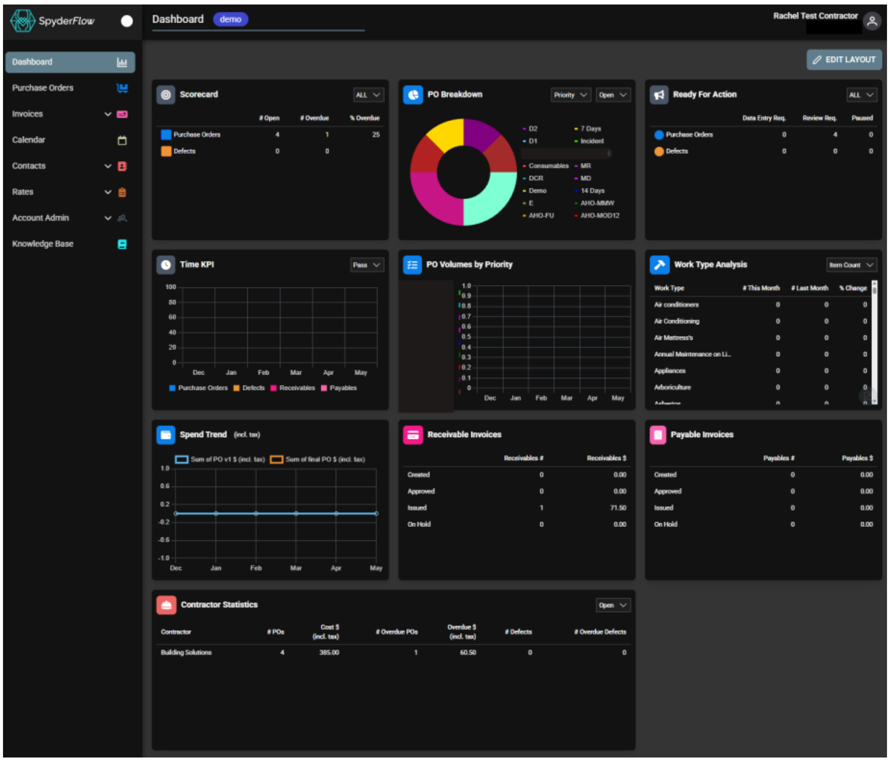
To invite other users in your company you first need to decide their level of access to your SpyderFlow.

There are two level types below:

1. **Contractor Administrator:** This gives full access to your company information in SpyderFlow.

   View of:

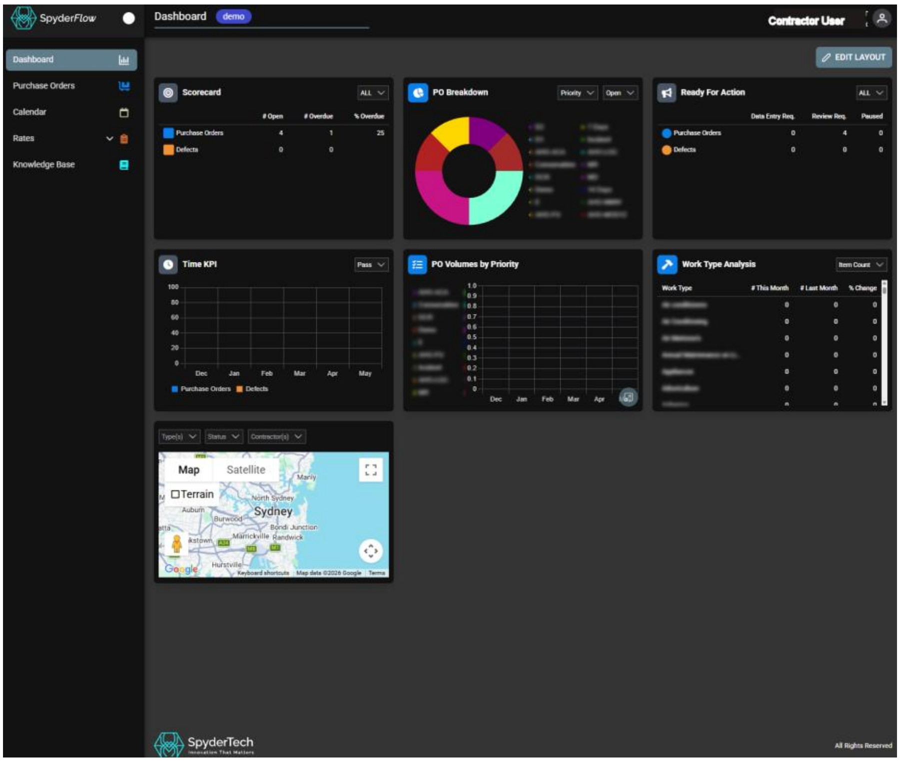
   - **Dashboard and widgets**
   - **Purchase Orders** – including prices, can add notes and attachments.
   - **Invoices** - Receivables and Payables
   - **Calendar –** Can add and filter to Events and Work Activities
   - **Contacts** – Contractor company information and contractor workers information/
   - **Rates** – including pricing.
   - **Account Admin** – including ability to invite your workers to be users.
   - **Knowledge Base**



2. **Contractor User:** Limited information of your company information. Cannot see pricing or add other users. Cannot access company invoices, company details or other workers information.

   View of:

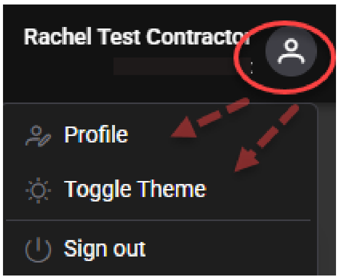
   - **Dashboard and widgets**
   - **Purchase Orders** – no prices, can add notes and attachments.
   - **Calendar -** Can add and filter to Events and Work Activities
   - **Rates** – no pricing
   - **Knowledge Base**



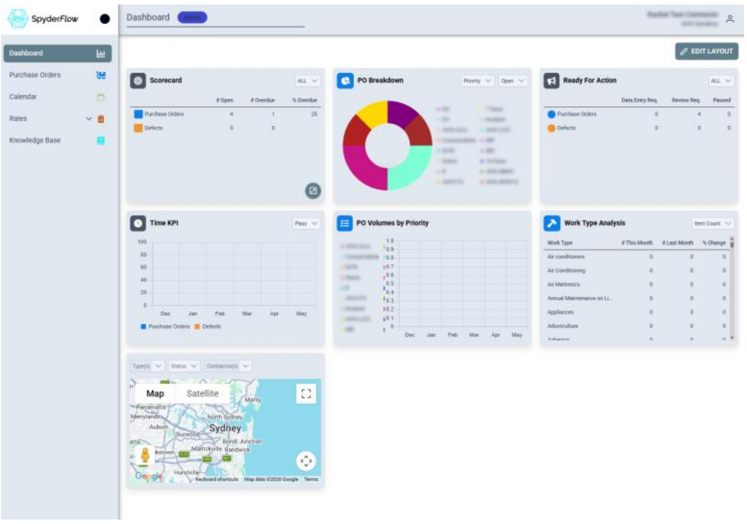
Notes:

- Both Contractor Administrators and Contractor Users will see all Purchase Orders for your company and cannot assign per worker at moment.
- Widgets are less if Administrator to User in company. Click Edit layout to move, remove or re add widgets to your SpyderFlow.
- Light and dark themes are now available for all SpyderFlow users in Web version. Change through profile icon and select “Toggle Theme”. See screenshots next page.

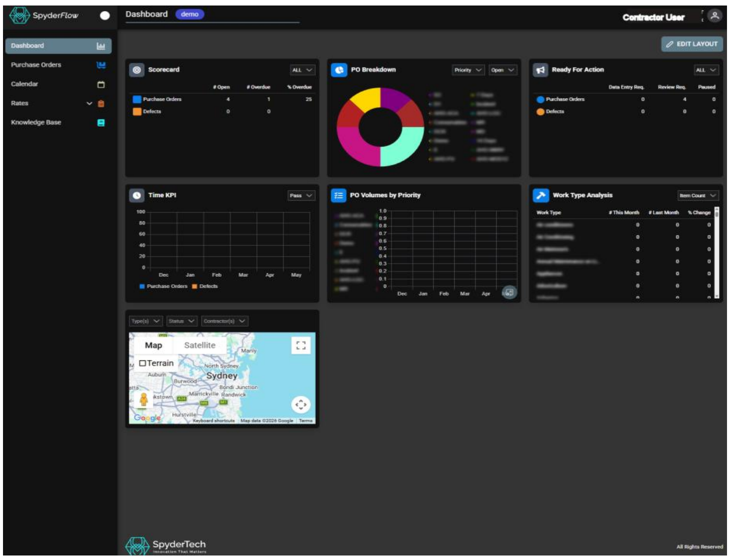
- Profile information can also be viewed and edited through Profile icon (top right). Reset log in button is also now available to all users. If originally set up to email you can reset to log in another way.



Light theme



Dark theme



Contractor Administrator – Invite other users to SpyderFlow.

1. Sign into SpyderFlow with your Administrator account. This is the full access user for your contractor company.
2. Main Menu → Go to Account Admin
3. Select External Users
4. Click **+INVITE.**
5. Fill in new user:
   a. **Email address**
   b. **Display Name**
   c. **Type:** Select **Contractor** from drop down.
   d. **User Role:** Select **Contractor Administrator** or **Contractor User** from drop down depending on the access you want the user to have to your company information.
   e. **Phone:** This is an optional field and is more a contact phone not a MFA phone number.
6. Click **Invite** (top right)
7. Invitation will be sent to your company member to sign up to SpyderFlow.

Note: Once invited please let your Response Co-ordinator know for SpyderFlow approval of the user.

Otherwise, they may not access information when log in. Their contractor record will be in draft until approved and status updated to active.

Handy Hint!

You may want to direct them to sign up by email, google, apple, Microsoft (depending on your company requirements.

Or they may just choose which way is handy for them to sign in with.

MFA code will by default be to the user email address when user's sign into SpyderFlow.

- If need to add MFA to go to the user mobile go to the Profile icon (when signed in) and add user mobile phone number to the MFA Phone Field. See process next page.

Add MFA to Mobile Phone Number

Once signed into SpyderFlow: Go to Profile Icon → Profile

My Profile → Details Page → Click **EDIT**

MFA Mobile # field: fill in using country code format with mobile number. For example: In Australia will be +61 then phone number format.