

HOW TO

ADD A PRIMARY CONTACT AND SEND WELCOME EMAIL

- 1 Within the Employer (Subcontractor Company) Record, in the Primary Contact section, select the **blue plus +** icon.

The screenshot shows the HAMMERTech interface for an Employer record. The left sidebar contains navigation links: Dashboard, Personnel, Employers (Active, Deactivated), Meetings, Pre-Task Plans, SWMS, Permits, Equipment, SDS, Bookings, Safety Plan, and Inspections. The main content area is titled 'Employers / [Company Name]'. It has tabs for 'Employer - Project Details', 'Nominated Representative', and 'Employer Profile'. The 'Primary Contact' section is highlighted with a blue box and a blue circle with the number 1, indicating where to click the plus icon to add a new contact.

- 2 Select **New**, enter an **Email address** and **Validate** and complete form.

- 3 Select the **Contact Type** (Project or Company).

- 4 Select whether to **Send Welcome Email Immediately**.

- 5 Select **Submit**.

Subcontractor onboarding email has been sent.

The screenshot shows the 'Add Primary Contact' form. It has a 'New Primary Contact Details' section with fields for 'New/Existing' (set to 'New'), 'Email' (with a 'Validate' button), 'Contact Type' (set to 'Project level contact'), 'First Name', 'Last Name', and 'Mobile'. There are checkboxes for 'Receive Site Notifications' and 'Has Access To Confidential Information'. Below this is a 'Welcome Email' section with a checkbox for 'Send Welcome Email Immediately' and a text area for 'Any specific instructions to send?'. The 'SUBMIT' button is highlighted with a blue box and a blue circle with the number 5.