

Overview

SOP allows producers and contractors to connect to other companies' accounts, including other contractors, inspection firms, and project owners (e.g. DOTs).

After a company is connected, they can be assigned to individual jobs, allowing the company's users to access E-Tickets, reports, and other features. *Note: Please see SOP's Job Access Guide for more information.*

Navigation

To access linked accounts, administrator and project manager users can click on 'Accounts' on their dashboard to access different types of accounts.



After the Users page appears, use the top buttons to select Customers, Inspection Firms, or Project Owners to manage linked accounts. *Note: Users are unable to add or manage users from other linked accounts.*



Customers

On the Customers tab, users can manage their connected customer accounts to access E-Tickets, scheduling, and unloading features. Use the Add Customer or Remove Customer buttons to submit a request to SOP to manage connected customers.



Customers

ADD CUSTOMER

| Name | Customer Code |
|-----------------------------|---------------|
| Ajax Paving of Florida, LLC | 55000 |
| Gator Grading & Paving | 20043 |

REMOVE CUSTOMER

Inspection Firms

On the Inspection Firms tab, users can manage their connected inspection firms to access E-Tickets, reports, and unloading features.

Use the Add Inspection Firm button to find existing companies in SOP and add them to your account.

Use the Remove Account to hide the company from the Job Access List. *Note: Removing a connected account won't remove the account from previously connected jobs.*



Inspection Firms

ADD INSPECTION FIRM

| Name | Location | |
|-----------|----------|----------------|
| HighSpans | | REMOVE ACCOUNT |

Project Owners

On the Project Owners tab, users can manage their connected project owners to access E-Tickets, reports, and unloading features.

Use the Add Project Owner button to find existing companies in SOP and add them to your account.

Use the Remove Account to hide the company from the Job Access List. *Note: Removing a connected account won't remove the account from previously connected jobs.*



Project Owners

ADD PROJECT OWNER

| Name | Location | |
|-------------|----------|----------------|
| Florida DOT | | REMOVE ACCOUNT |

Add Account

Use the Add Account page to search for existing companies in SOP. Enter a keyword from the company name and click search. The Search Results will display a list of matching names. If the company is listed, click 'Add Account' to link to your account.

Add a Company

INVITE A NEW COMPANY

Search for a Company

| | |
|---|---|
| Company Name Enter a company name or keyword to find a company's account. | Account Type Select the account type. |
| <input type="text" value="High"/> | Inspection Firm ▼ |
| <input type="button" value="SEARCH"/> | |

Search Results

| Company | Location | |
|-----------|----------|--|
| HighSpans | , FL | <input type="button" value="ADD ACCOUNT"/> |

Inviting New Accounts

If an account isn't found, use the 'Invite New Company' button on the Add Company page to create and invite a new company account.

On the invite page, complete the company name, location, and phone details. Then enter a name and email address for the primary contact for the company, typically an owner or manager.

After the account is added, the contact will receive an activation email to finish setting up their account. The new account will be listed in your Connected Accounts list and can be assigned to Jobs.

Invite New Company

Company Details

| | | |
|--|--|----------------------------------|
| Company Short Name (e.g. APC) | Full Name (e.g. Alphabet Paving Company, LLC) | |
| <input type="text" value="Name"/> | <input type="text" value="Full Name"/> | |
| City | State | Zip |
| <input type="text" value="City"/> | <input type="text" value="Select"/> | <input type="text" value="Zip"/> |
| Phone | | |
| <input type="text" value="Phone"/> | | |
| Account Type | | |
| <input type="text" value="Inspection Firm"/> | | |

Primary Contact Details

| | |
|--|--|
| Full Name | Email Address |
| <input type="text" value="Enter Full Name"/> | <input type="text" value="Enter Email Address"/> |