

User Guide

Company | Adding Companies to a Cardholder


STEP ONE | Adding a Company to a Cardholder

In the Cardholders profile next to the Works For table click 'add'

Felicity Stevenson (cardholder)

general competencies roles tasks keys training site con
report

Works For

Default	Company	Id	Site Association	Roles	View
✓	Onsite Track Easy Pty Limited	251	Employee	Employee, Contractor	View 

Search for the company you are wanting to add. Click into the company.

Onsite Companies for Felicity Stevenson

Found 2 matches.

Company	Type	Assoc.	Id	ABN	Address	Phone No.
Pegasus Management Pty. Limited	Employer	✓	138	91 080 018 800	426 King St, Newcastle	1300441433
Pegasus Management Pty. Limited (TENNIS)	Contractor	✗	21254	91 080 018 800	426 King St, Newcastle	1300441433

An admin note will appear for you to complete.

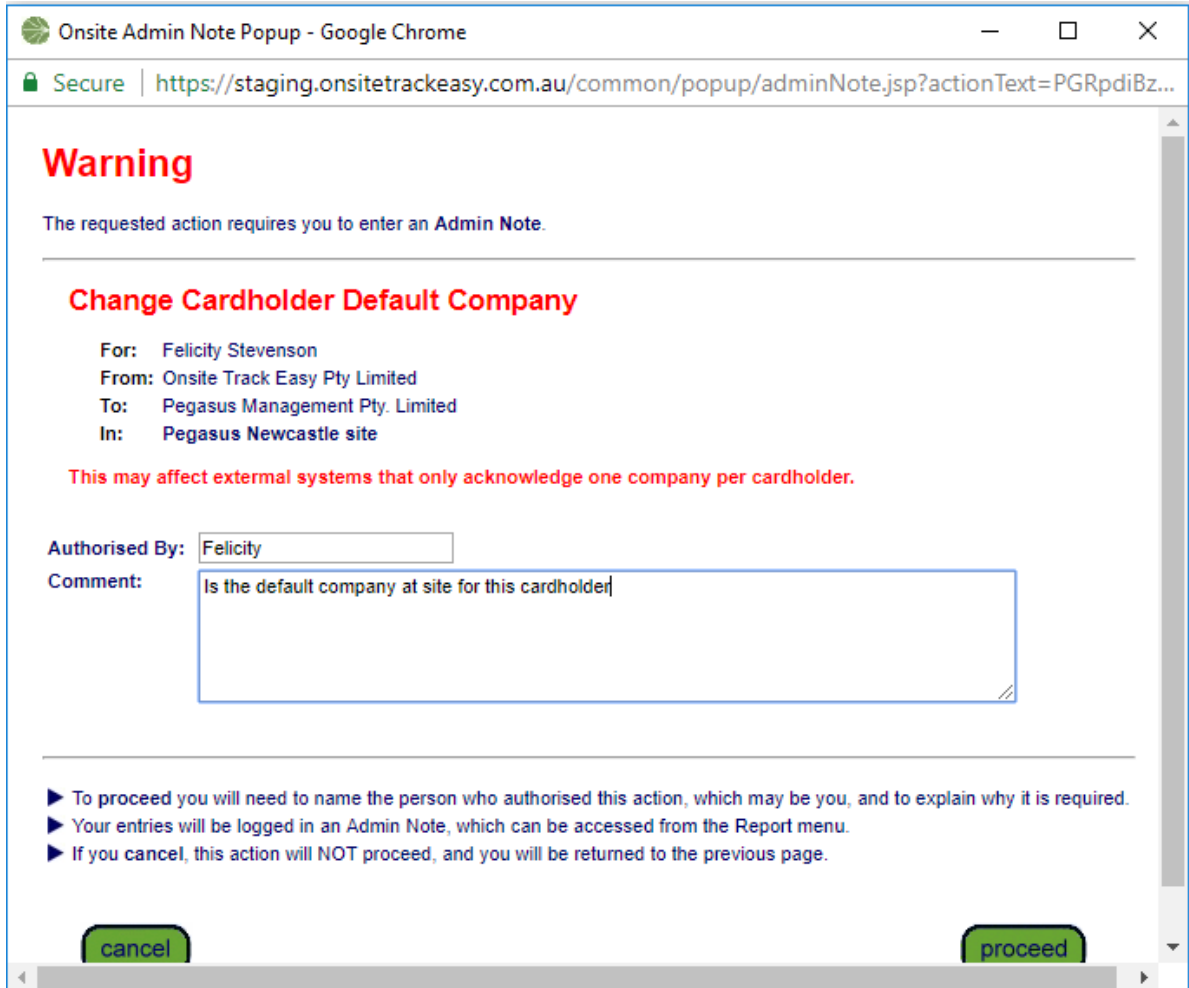
If you want to make this new company the default company for this cardholder at your site, click 'set' in the Works For table.

Works For

Default	Company	Id	Site Association	Roles	View
✓	Onsite Track Easy Pty Limited	251	Employee	Employee, Contractor	View
set	Pegasus Management Pty. Limited	138	Employee	Employee	View

add

An admin note will appear for you to complete



Onsite Admin Note Popup - Google Chrome

Secure | <https://staging.onsitetrackeasy.com.au/common/popup/adminNote.jsp?actionText=PGRpdiBz...>

Warning

The requested action requires you to enter an Admin Note.

Change Cardholder Default Company

For: Felicity Stevenson
From: Onsite Track Easy Pty Limited
To: Pegasus Management Pty. Limited
In: Pegasus Newcastle site

This may affect external systems that only acknowledge one company per cardholder.

Authorised By:

Comment:

- ▶ To proceed you will need to name the person who authorised this action, which may be you, and to explain why it is required.
- ▶ Your entries will be logged in an Admin Note, which can be accessed from the Report menu.
- ▶ If you cancel, this action will NOT proceed, and you will be returned to the previous page.