# User Guide

Employee, Contractor View

add

## 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)

**Onsite Track Easy Pty Limited** 

general	competencies	roles	t	asks	keys	training	site con
rep	port						
Works For Default Compa	nv		Id	Site Association	Roles	View	

251

Employee

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

#### Onsite Companies for Felicity Stevenson

Pegasus Management search		)				
Company	Туре	Assoc.	ld	ABN	Address	Phone No.
Pegasus Management Pty. Limited	Employer	$\checkmark$	138	91 080 018 800	426 King St, Newcastle	1300441433



An admin note will appear for you to complete.

🋞 Onsite Admin I	Note Popup - Google Chrome	_		$\times$
🗎 Secure   http	os://staging.onsitetrackeasy.com.au/common/popup/adminNote.jsp?a	ictionTex	t=VGhp	cyB
Warning				Î
The requested ac	tion requires you to enter an Admin Note.			
This will make: <b>F</b> e	elicity Stevenson			
an employee of: F	Pegasus Management Pty. Limited			
This may allow c	company users to view confidential information about this person.			- 1
Only proceed if y	you are certain this person does work for this company.			- 1
Authorised By:	Felicity			
Comment:	Now working for Pegasus as well.			
		//		- 1
				- 1
	ou will need to name the person who authorised this action, which may be you, and to exp	plain why i	t is require	ed.
	ill be logged in an Admin Note, which can be accessed from the Report menu. this action will NOT proceed, and you will be returned to the previous page.			- 1
				- 1
cancel		proc	eed	
				•

......................

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	ld	Site Association	Roles	View	
$\checkmark$	Onsite Track Easy Pty Limited	251	Employee	Employee, Contractor	View	_
set	Pegasus Management Pty. Limited	138	Employee	Employee	View	ad



An admin note will appear for you to complete

🋞 Onsite Admin I	Note Popup - Google Chrome	_		×
■ Secure   http	os:// <b>staging.onsitetrackeasy.com.au</b> /common/popup/adminNote.jsp?ad	ctionText	t=PGRpc	liBz
Warning The requested ac	tion requires you to enter an Admin Note.			^
Change (	Cardholder Default Company			
From: Ons To: Peg In: Peg	city Stevenson site Track Easy Pty Limited jasus Management Pty. Limited jasus Newcastle site ct extermal systems that only acknowledge one company per cardholder.			
Authorised By:	Felicity			
Comment:	Is the default company at site for this cardholder	1		
Your entries w	ou will need to name the person who authorised this action, which may be you, and to exp ill be logged in an Admin Note, which can be accessed from the Report menu. this action will NOT proceed, and you will be returned to the previous page.	lain why it	is required	- L
4				

