



Adding a company to a cardholder

ADDING A COMPANY TO A CARDHOLDER

Please follow this guide to add a company to a cardholder in Onsite.

Jason Smith (cardholder)

general competencies roles tasks keys training site

report

Works For

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

Step 1

Login to Onsite.

In the cardholder's profile, next to the *Works For* table click **add**.

Onsite Companies for Jason Smith

Pegasus Management  

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 (EMPLOYER)	Contractor	✗	24254	91 080 018 800	426 King St, Newcastle	1300441433

Step 2

Search for the company you want to add this cardholder to. Select the company.

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Warning

The requested action requires you to enter an Admin Note.

This will make: **Jason Smith**
an employee of **Pegasus Management Pty. Limited**
This may allow company users to view confidential information about this person.
Only proceed if you are certain this person does work for this company.

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.

Step 3

An administration note will appear for you to complete.

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

Step 4

To make this company the default for this cardholder at your site, click **set** in the *Works For* table.

Warning

The requested action requires you to enter an Admin Note.

Change Cardholder Default Company

For: Jason Smith
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.

Step 5

An administration note will again appear for you to complete.

Click *proceed* to finalise the process.



For questions or assistance please call 1300 131 194
or email support@onsitetrackeasy.net.au