



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.

Adding an additional Company to Cardholder that works at your site/realm, will allow you to change the Default Company that Cardholder works for, so this be a requirement

NOTE: Adding a Company to a Cardholder has an **impact** on data privacy. Ensure that you are adding that Cardholder to the **correct** company that they are also working for. Duplicate companies with similar names appear in Onsite Track Easy.

Where you are in doubt, the recommended approach is to contact the Cardholder or main company contact directly prior to completing this action, to seek confirmation that they approve of this request.

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 add

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 (Pegasus)	Contractor	✗	2151	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