

User Guide

Adding Certs to a Company

STEP ONE | Adding Certs to a Company

In a company's profile click the Compliance tab.

Onsite Track Easy Pty Limited (contractor company) ✓ 84 098 220 743 ✓

- general
- compliance**
- user access
- locations
- contractors
- tokens
- keys
- messages

relationships

Click Add Cert

CERTS

Include Realms: Pegasus, Pegasus Demo and Site: Pegasus

Options: Include: Non-verified

Verified	Cert Name	Id	Basic
	Government.ABN.Valid	62022	System
	Government.Business Name.Valid	62023	System

[add cert](#)

Search for the Cert you want to add and Click into it to add to the company's profile.

Add Cert to Onsite Track Easy Pty Limited

[search](#) Include Inactive Certs

Found 1 match

Verified	Cert Name
	Insurance.Incident/Accident.Insurance

Fill in the Period of Currency for the Cert and tick the Authorised Box. Fill out any other required information for the Cert. Click the 'save & file' button to upload a document against the cert.

Edit cert of Onsite Track Easy Pty Limited

Insurance.Incident/Accident.Insurance Authorised: **authorised**

Renewal Chain: ← ID#213986 →

Authorised: By: Felicity Stevenson On: 17 January 2018

Period of Currency:

Start Date:	17 ▾	January ▾	2018 ▾	For	1 ▾	Years ▾	
End Date:	17 ▾	January ▾	2019 ▾	exact			eom

Comment:

Cert Type: **Insurance**

Insurer:	<input style="width: 100%;" type="text"/>	
Policy Number:	<input style="width: 100%;" type="text"/>	
Item:	<input style="width: 100%;" type="text"/>	
Amount:	Name	Amount
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Total:		<input style="width: 100%;" type="text" value="0"/>
End Date:	<input checked="" type="checkbox"/> Unspecified	
Conditions:	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	

Assigned: By: Felicity Stevenson On: 17 January 2018

Checklist:

redo

Active?

cancel
save
save & add new
save & add file

Select the file you need to upload and click 'upload'

Add File to Company Certification

Associate With: Onsite Track Easy Pty Limited (id=251); Insurance.Incident/Accident.Insurance (id=1327)

New Upload

use existing upload

File Owner: **Site: Pegasus Demonstration**

File to Upload: Site User Permission (1).docx Browse to select file for upload

Name: Name to use for this file after upload

Keywords: Enter searchable words separated by spaces

Private: Private files can only be viewed by users with the 'Can Access Private' permission

Description:

Status: **upload**

back

Click ok on the pop up

