Add/View/Delete Certificates

🛗 Wed, Jan 17, 2024 🛛 🖿 Agent Actions - Reactive, Quote, PPM, Audit

1. From the Agent Action button, choose "Add/View/Delete Certificates".

2. This screen will appear.

Modify Certificate for Work Order 5234545								
	Description	Created By	Created Date	Date				
	< III							
	Click here to add a new document, max size 30 MB							
				ОК	Cancel			
				UK	Cancer			

3. Click

Click here to add a new document, max size 30 MB... and this window will then open.

Select a file								
Description								
File Type	Certificate	-	File Sub Type	Fire Suppression	-			
File					Select			
Valid From	07 February 2013	•	Valid To	07 August 2013	•			
	Store image as thumbnail?							
						Jpload	Cancel	

4. Fill in all relevant details. Select a file by clicking on the "Select" button.

5. Once the correct file has been chosen, click on the "Upload" button. This will bring you back to the previous screen.

N	Modify Certificate for Work Order 5234545							
	y	Created Date	Date					
		22/03/2013	22/03/2013 - 22/03/2014	Remove	Edit			
	•		4					
				ОК	Cancel			

6. From here you are able to remove/edit the file. To remove this file click on the remove button. **Note:** If the Remove and Edit buttons are not visible just use the scroll bar at the bottom until they become visible.

7. To edit the file click on the edit button, this screen will open:

Edit document							
Description	Test certificate						
File Type	Certificate	-	File Sub Type	Fire Alarm Inspection	•		
File C:\Users\Donna.Sartain.OSTARASYSTEMS\AppData\Local\Apps\2.0\Data\J80H1JI Select							
Valid From	22 March 2013	-	Valid To	22 March 2014	•		
	Store image as thumbnail	2					
						Save	Cancel

8. From here you can amend the Description the File Sub Type and the Valid From and To Dates. Click Save to save any amendments.

9. Clicking on the "OK" button will record an Event on the Work Order.

Note: On Certificate Upload against a PPM Work Order, future PPM Visit Dates are updated on the Contract based on Certificate expiry to ensure compliance is maintained. This will change the visit start date to 30 days prior to the certificate expiry.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=280