# Add/View/Delete Certificates

Certain jobs cannot be completed just by completing the work. Some jobs may require a certificate to be uploaded ad part of the job completion. Uploading certificates can be achieved using the "Add/View/Delete Certificates" action.

1. On the Job Detail screen, select the "Add/View/Delete Certificates" button to display the Add/View/Delete Certificates screen.
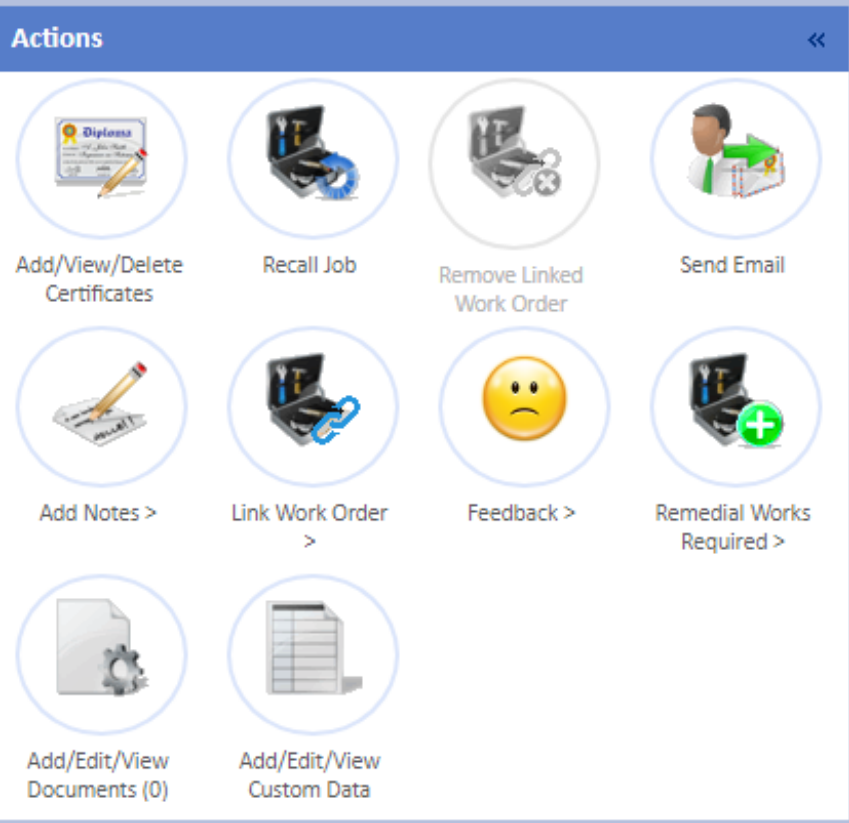
2. There are two screens that can appear depending on the settings of the Contract in the system: Per Asset screen or the Per Work Order screen.

The Per Asset screen will list the Assets on the job. Select an Asset to upload the certificate to. This will display the Document List screen. Click the link to upload the certificate.

The Per Work Order screen will display the Document List screen. Click the link to upload the certificate.

Document List

Job   7609690

Job Description   Air Conditioning PPM (Trimesterly)

ℹ️ If you are about to upload both a pass and a fail certificate please upload the fail certificate first

Click to upload a new PPM certificate

Done

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3. Next, choose the certificate that is going to be uploaded and give it a description. Depending on the type of work that took place, it is possible that an service or examination took place. If that is the case then it is possible for the job to "Pass" or to "Fail". Using the Sub Type field, the User can determine whether the certificate being uploaded is a "Pass" certificate or a "Fail" one as well the duration of the certificate (how long it is active for).

Select the date the certificate is active from in the "Valid From" field and, depending on the settings of the system, the "Valid To" date will automatically adjust to match the duration of the certificate.

Upload File   ✕

Name	
Type	Certificate ∨
Failed Certificate?	☐
Sub type	Air Conditioning Inspection/Refrigerant Leak Check (Annual) - Pass ∨
File	Choose File No file chosen
Valid From	4/14/2016 🗓️
Valid To	4/14/2017 🗓️

NOTE: The maximum file size for uploaded documents is 30 MB

Upload   Cancel

Once the details have been entered and the certificate is selected, click the "Upload" button to perform the upload.

Note: If the "Valid To" date falls in the past, the certificate will not be uploaded. The "Valid To" date must fall on or after todays date. Also, the "Valid To" date can only be changed if the user has the "Can Edit Work Order Certificate Valid To Date" Permissions against their

Profile.

4. Once uploaded, click the "Save" button to apply the upload to the job. This will then move the job onto a completed state.

If for some reason the certificate isn't required to be uploaded at this point then click the "Return to without saving" to cancel the changes.

Note: If the certificate uploaded is a "Fail" certificate then the work will not progress onto a completed state. Instead it will stay at an awaiting further information state until a "Pass" certificate is uploaded.