

IAFCertSearch.org

Accreditation Bodies: Guide to the IAF CertSearch

A decorative graphic consisting of multiple thin, light blue lines that flow and curve across the bottom half of the page, creating a sense of motion and depth.

Getting Started

This document will help you get started with IAF CertSearch. Once you have activated your account, we will show you how to upload and manage your data. We will provide you with a step-by-step guide and supporting videos to assist you.

Here is a **general demonstration video**:

<https://www.youtube.com/watch?v=8FIND6c-3M4&t=3s>

Here is a **general AB overview video**:

https://youtu.be/_J4ZmfDkxoc

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11. User Guide

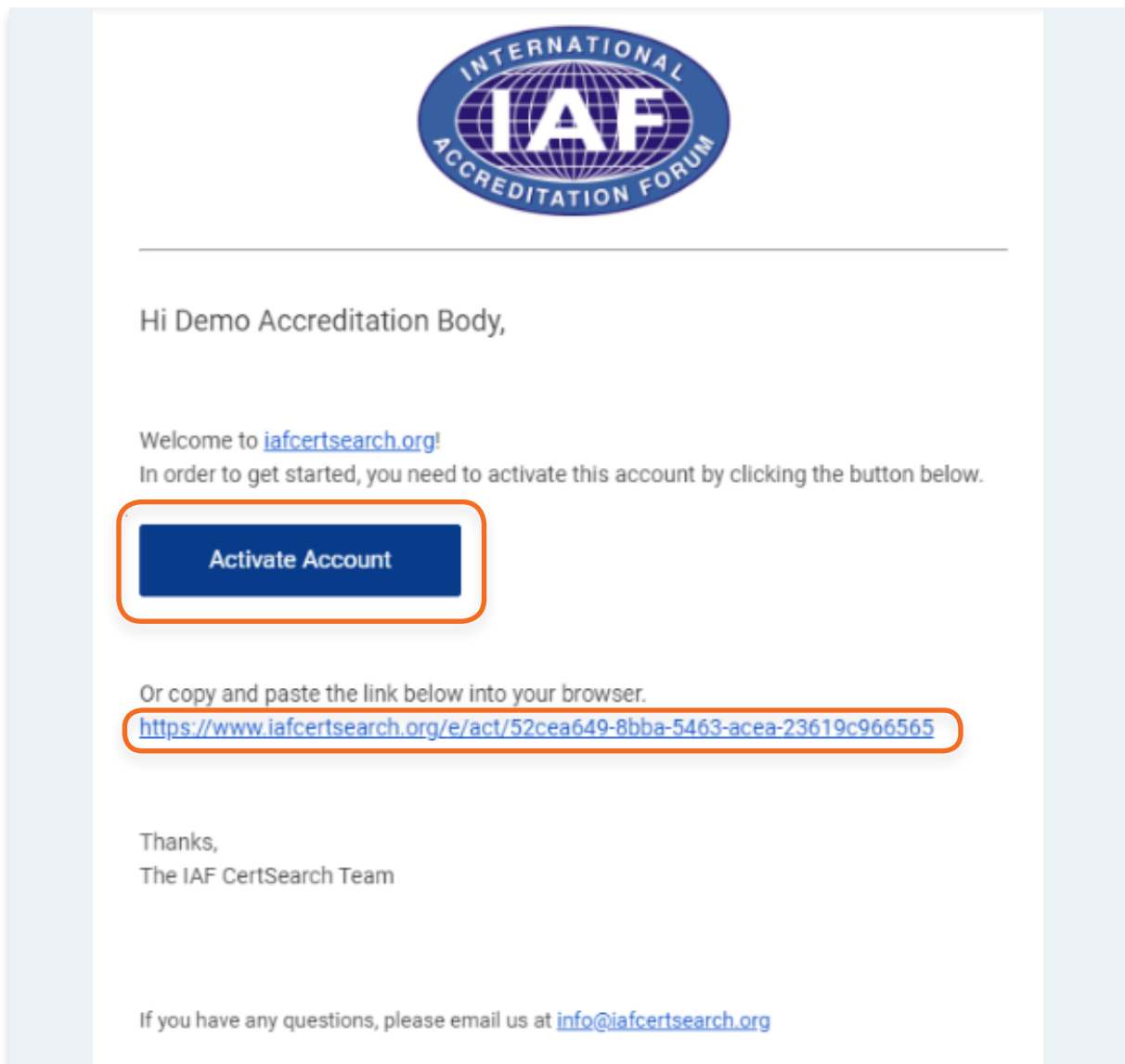
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1. Activation

1.1. How to Activate Your Account

1. Go to your inbox and open the email sent from info@iafcertsearch.org with subject "Activation - IAF" .
2. Click the Activate Account button or Copy and paste the link from your email to your web browser.

NOTE: If you did not receive an email, Click the "Email didn't arrive?" link and resend.





Hi Demo Accreditation Body,

Welcome to iafcertsearch.org!
In order to get started, you need to activate this account by clicking the button below.

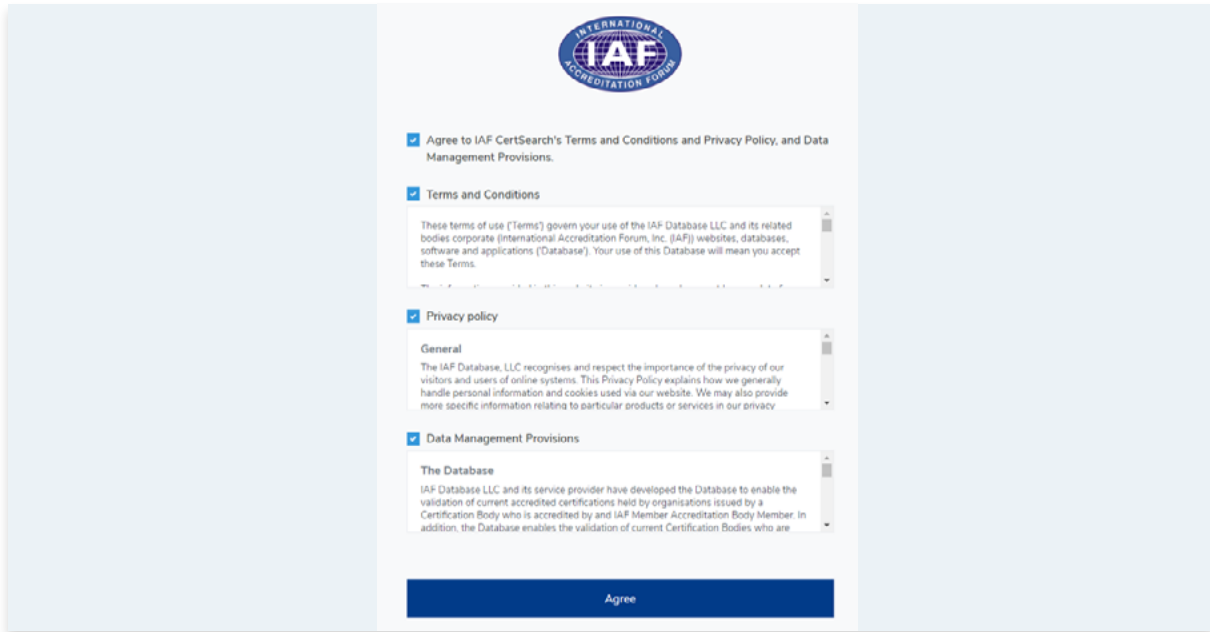
[Activate Account](#)

Or copy and paste the link below into your browser.
<https://www.iafcertsearch.org/e/act/52cea649-8bba-5463-acea-23619c966565>

Thanks,
The IAF CertSearch Team

If you have any questions, please email us at info@iafcertsearch.org

3. Read the Terms and Conditions, Privacy Policy, and Data Management Provisions. Check the tick boxes.

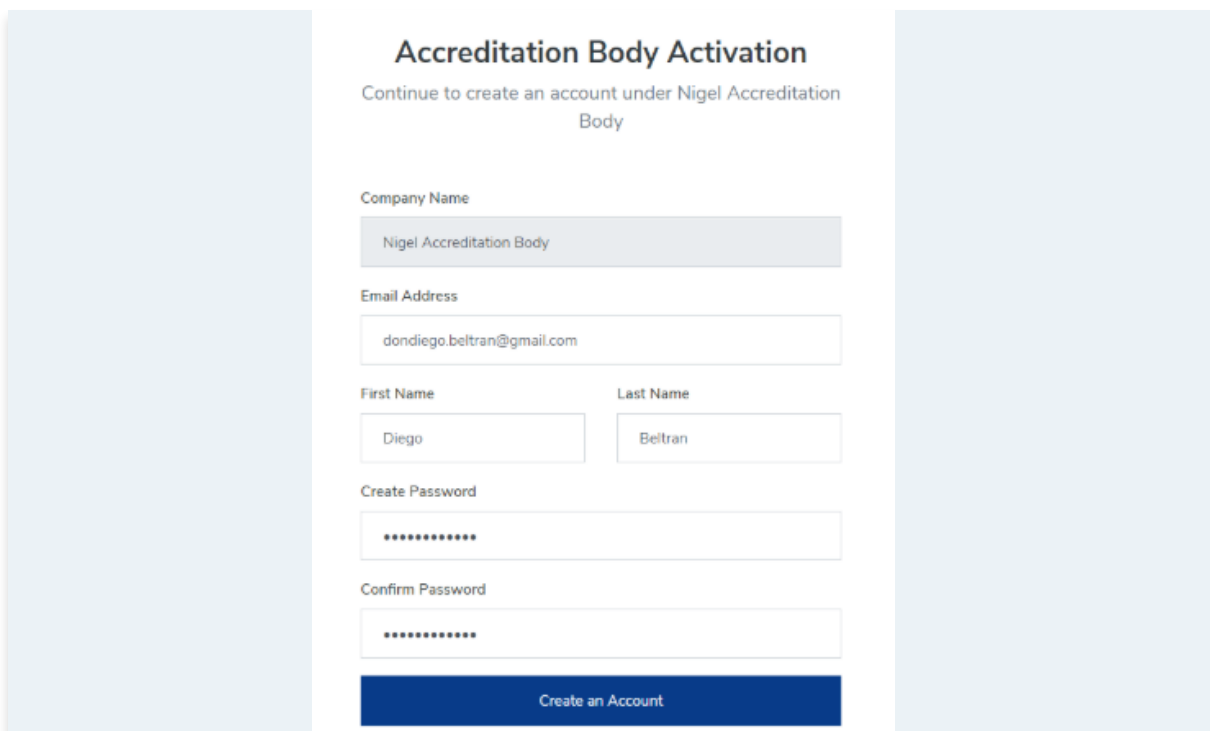


The screenshot shows the International Accreditation Forum (IAF) logo at the top. Below it, there are three sections, each with a checked checkbox and a text area:

- Agree to IAF CertSearch's Terms and Conditions and Privacy Policy, and Data Management Provisions.**
- Terms and Conditions**
These terms of use ("Terms") govern your use of the IAF Database LLC and its related bodies corporate (International Accreditation Forum, Inc. (IAFI)) websites, databases, software and applications ("Database"). Your use of this Database will mean you accept these Terms.
- Privacy policy**
General
The IAF Database, LLC recognises and respect the importance of the privacy of our visitors and users of online systems. This Privacy Policy explains how we generally handle personal information and cookies used via our website. We may also provide more specific information relating to particular products or services in our privacy.
- Data Management Provisions**
The Database
IAF Database LLC and its service provider have developed the Database to enable the validation of current accredited certifications held by organisations issued by a Certification Body who is accredited by and IAF Member Accreditation Body Member. In addition, the Database enables the validation of current Certification Bodies who are

At the bottom of the form is a blue button labeled "Agree".

4. Enter your: Email Address, First Name, Last Name, and Create a Password.



The screenshot shows the "Accreditation Body Activation" form. The title is "Accreditation Body Activation" and the subtitle is "Continue to create an account under Nigel Accreditation Body".

The form contains the following fields:

- Company Name:** Nigel Accreditation Body
- Email Address:** dondiego.beltran@gmail.com
- First Name:** Diego
- Last Name:** Beltran
- Create Password:** [Redacted]
- Confirm Password:** [Redacted]

At the bottom of the form is a blue button labeled "Create an Account".

5. Go back to your inbox and you should receive a confirmation email.
Note: if you did not receive an email, Click the "Email didn't arrive?" link and resend.
6. Open the email with Subject "Please confirm your email address -IAF"

7. A "Success" message will pop up. Click OK to proceed.
8. You will then be redirected to the IAF CertSearch Log in page. Enter your email address and password and click Log in.

Log in

Please log in to your account

Email Address

dondiego.beltran@gmail.com

Password

Remember me

Log in

[Forgot password?](#)

If you have any questions, please email us at info@iafcertsearch.org

2. Dashboard

2.1. Overview of the Dashboard

The dashboard will be your main page. The left hand navigation panel in the dashboard will provide a link to the key areas in your IAF Certsearch Account.

Here is a video guide overview of the features available in the IAF CertSearch accreditation body account:

https://youtu.be/_J4ZmfDkxoc

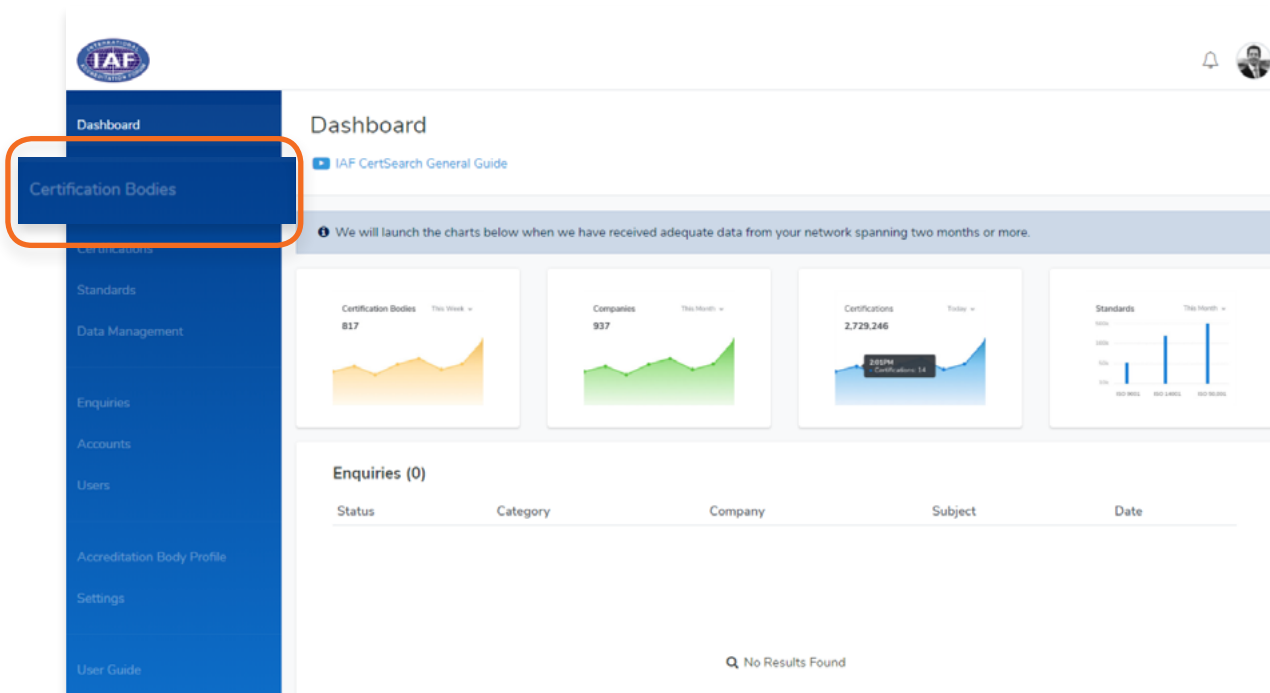
The screenshot shows the IAF CertSearch dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Accreditation Body Profile, Settings, and User Guide. The main content area is titled 'Dashboard' and includes a link to 'IAF CertSearch General Guide'. A message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' Below this are four charts: 'Certification Bodies This Week' (817), 'Companies This Month' (937), 'Certifications Today' (2,729,246), and 'Standards This Month' (a bar chart with three bars). Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date. At the bottom of the enquiries section, it says 'No Results Found'.

3. Certification Bodies

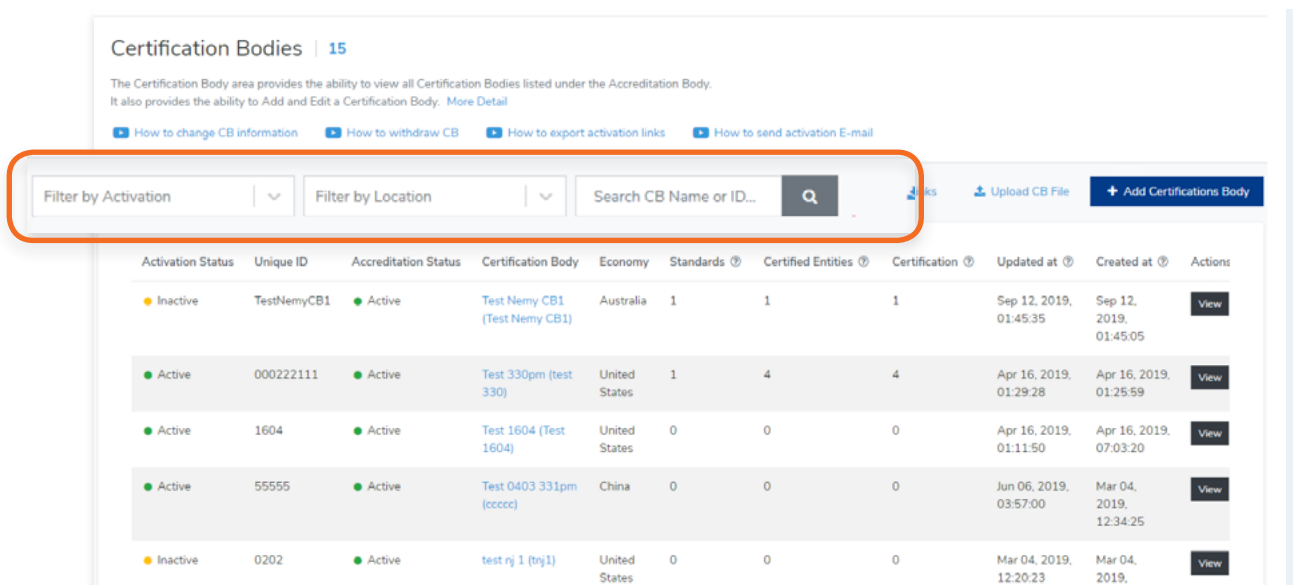
3.1. Where Can I find a List of all Certification Bodies

The certification bodies area displays all the certification bodies which have been uploaded.

From the Dashboard, click **Certification Bodies** in the left hand navigation.



You can filter the Certification bodies by activation status, location or search for the **Certification Body directly by name or Certification Body ID.**



3.1. Where can I find a List of all Certification Bodies

You can also export the **CB activation links**, **upload a CB file**, or **Add a Certification Body**.

The screenshot shows the 'Certification Bodies' page with 15 items. The toolbar at the top right contains three buttons: 'Export CB Activation Links', 'Upload CB File', and 'Add Certifications Body'. The table below lists certification bodies with columns for Activation Status, Unique ID, Accreditation Status, Certification Body, Economy, Standards, Certified Entities, Certification, Updated at, Created at, and Actions.

Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification	Updated at	Created at	Actions
Inactive	TestNemyCB1	Active	Test Nemy CB1 (Test Nemy CB1)	Australia	1	1	1	Sep 12, 2019, 01:45:35	Sep 12, 2019, 01:45:05	View
Active	000222111	Active	Test 330pm (test 330)	United States	1	4	4	Apr 16, 2019, 01:29:28	Apr 16, 2019, 01:25:59	View
Active	1604	Active	Test 1604 (Test 1604)	United States	0	0	0	Apr 16, 2019, 01:11:50	Apr 16, 2019, 07:03:20	View
Active	55555	Active	Test 0403 331pm (cccc)	China	0	0	0	Jun 06, 2019, 03:57:00	Mar 04, 2019, 12:34:25	View
Inactive	0202	Active	test rj 1 (trj1)	United States	0	0	0	Mar 04, 2019, 12:20:23	Mar 04, 2019,	View

If you would like to view any of the certification bodies in more detail, you can **click on the Certification Body Name** or the **View** button on the right side.

This screenshot shows the 'TEST Certification Body (TESTCB)' row highlighted. The 'View' button for this row is also highlighted. The table data is as follows:

Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification	Updated at	Created at	Actions
Active	TestNemyCB1	Active	Test Nemy CB1 (Test Nemy CB1)	Australia	1	1	1	Sep 16, 2019, 08:44:12	Sep 12, 2019, 01:45:05	View
Inactive	012345	Active	TEST Certification Body (TESTCB)	United States	2	4	4	Sep 16, 2019, 08:21:38	Apr 16, 2019, 01:25:59	View

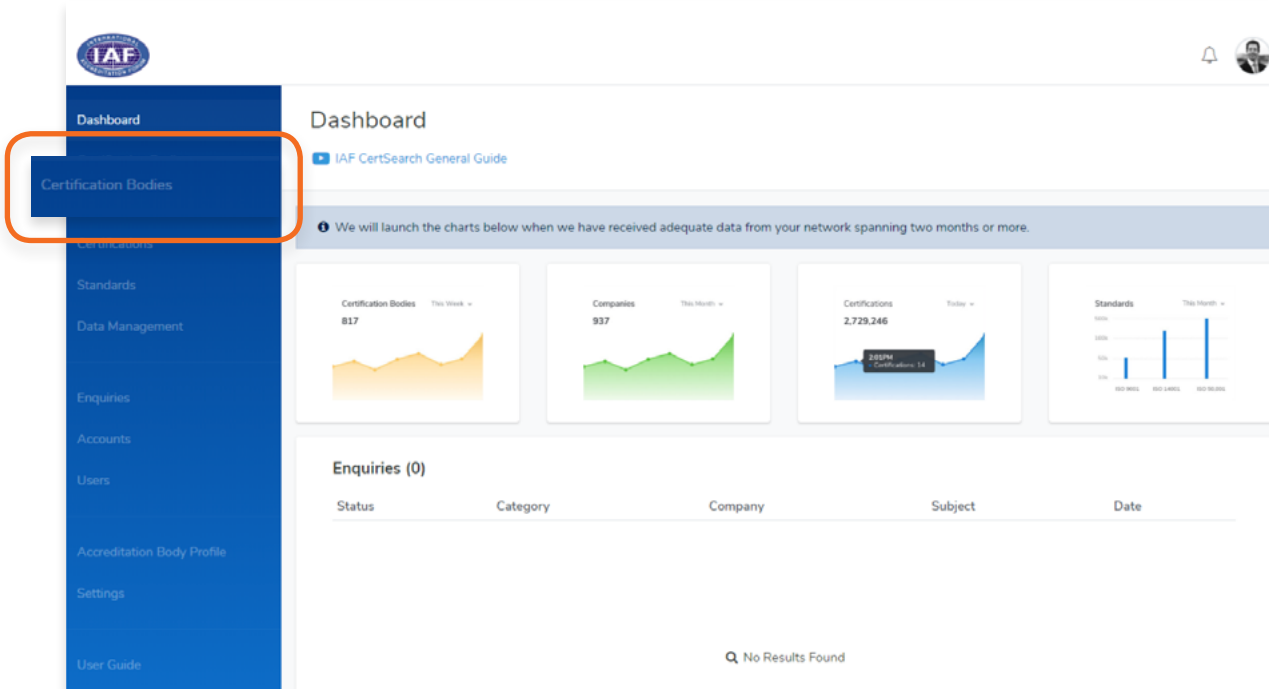
This page also shows you the number of standards, certified entities, and certifications for each certification body.

This screenshot highlights the 'Standards', 'Certified Entities', and 'Certification' columns for the 'TEST Certification Body (TESTCB)' row. The table data is as follows:

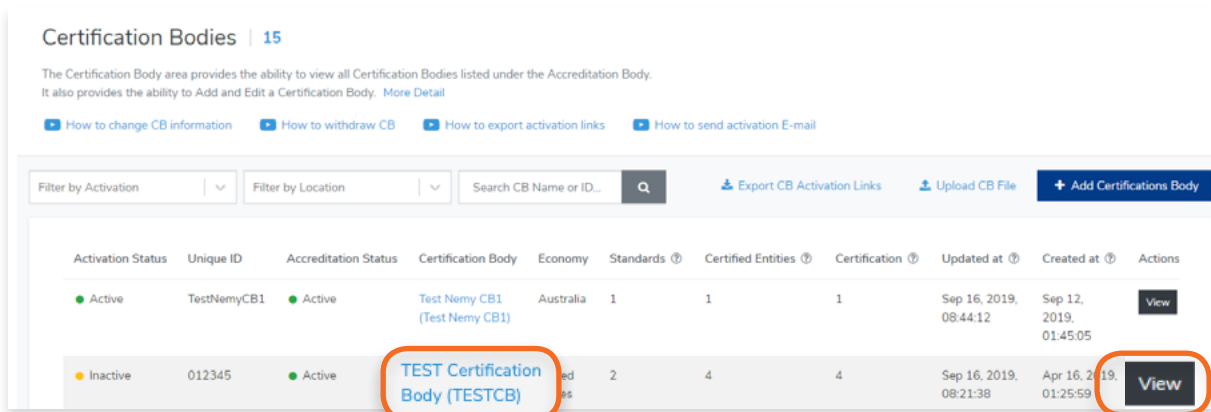
Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification	Updated at	Created at	Actions
Active	TestNemyCB1	Active	Test Nemy CB1 (Test Nemy CB1)	Australia	1	1	1	Sep 16, 2019, 08:44:12	Sep 12, 2019, 01:45:05	View
Inactive	012345	Active	TEST Certification Body (TESTCB)	United States	2	4	4	Sep 16, 2019, 08:21:38	Apr 16, 2019, 01:25:59	View

3.2. How to View Certification Body Information

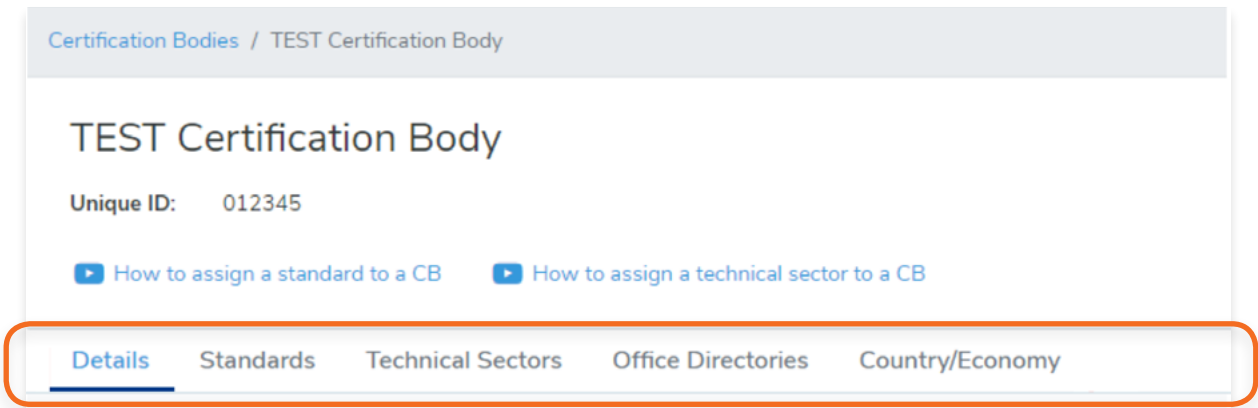
1. From the Dashboard, click Certification Bodies in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to view.
3. Click on the Certification Body Name or Click View.

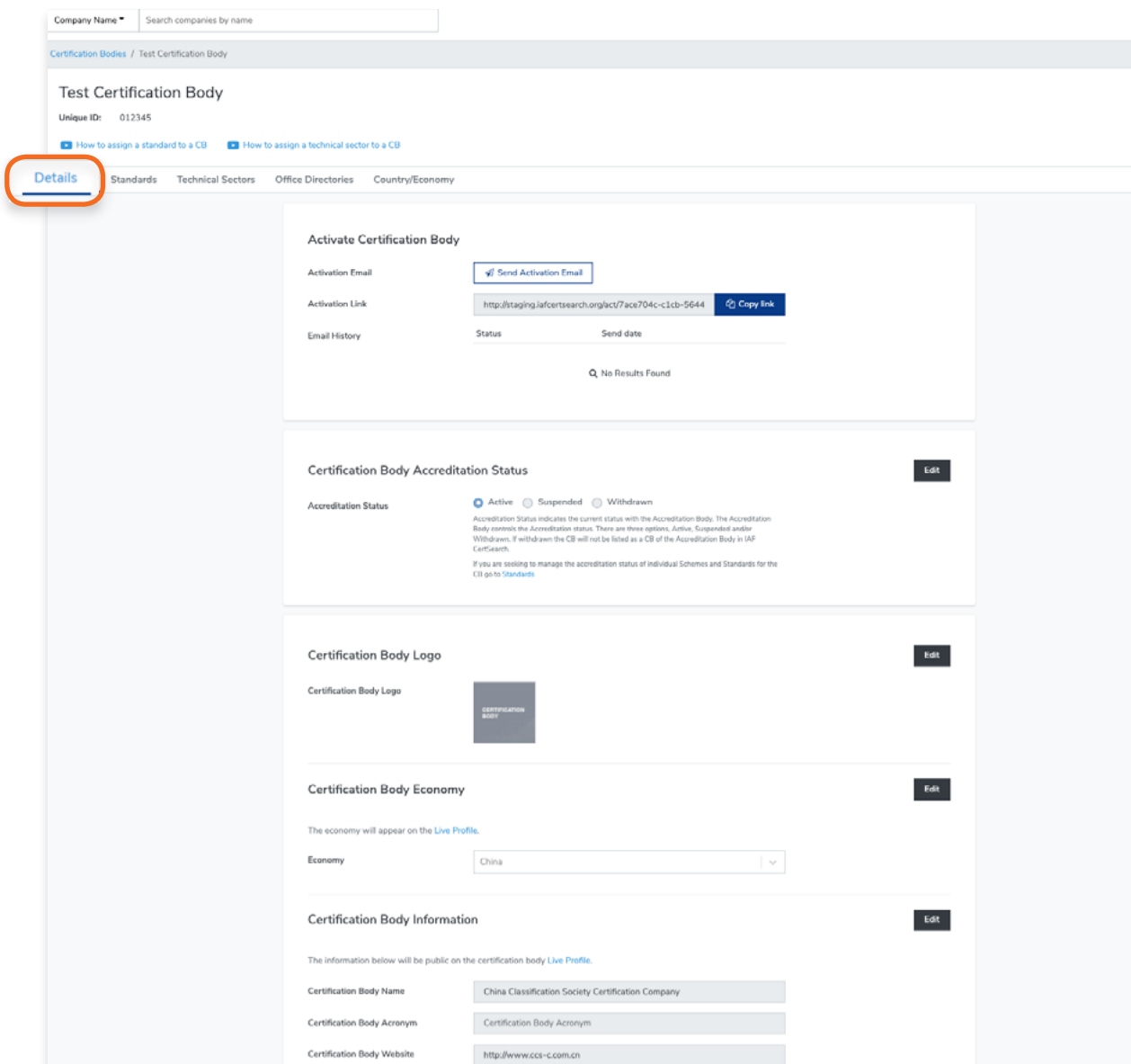


Here you will be able to view and edit Certification Body Details, Standards, Technical Sectors, Office Directories, Country/Economy .



Details

To view Details, click Details in the menu bar.



Standards

To view Standards, click Standards in the menu bar.

Certification Bodies / TEST Certification Body / Standards

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

Details **Standards** Technical Sectors Office Directories Country/Economy

Filter by Status Search Standard Name

[+ Assign Standard](#)

Status	Scope Type	Scheme	Standard	First Issued at	Issued at	Expiry at	Action
Active	Management System	Quality Management System	ISO 9001:2015	2019-04-13	2019-04-13	2022-04-13	View
Active	Management System	15224 - Qualitätsmanagementsysteme / Dienstleis...	ISO 45001:2015	2019-09-12	2019-09-12	2019-09-12	View

Technical Sectors

To view Technical Sectors, click Technical Sectors in the menu bar

Certification Bodies / TEST Certification Body / Technical Sectors

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

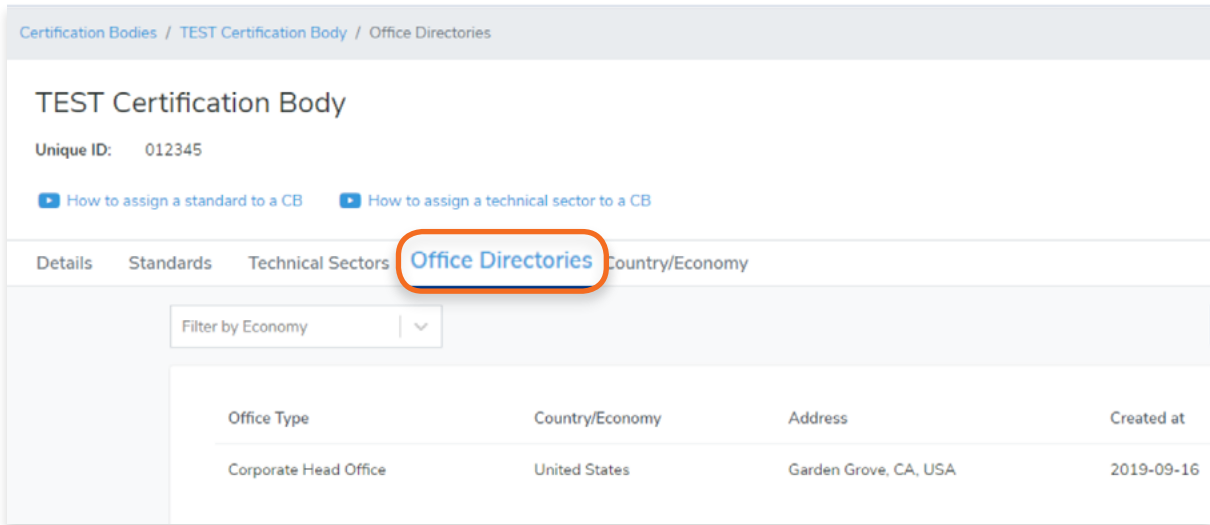
Details Standards **Technical Sectors** Directories Country/Economy

[+ Assign](#)

Scheme Name	Sector Name	All Sectors	Sector Code
Quality Management System	Textiles and textile products	Yes	
Quality Management System	Mining and Quarrying	No	02
Quality Management System	Manuf. of coke and refined petroleum products	No	10
Quality Management System	Leather and Leather products	No	05

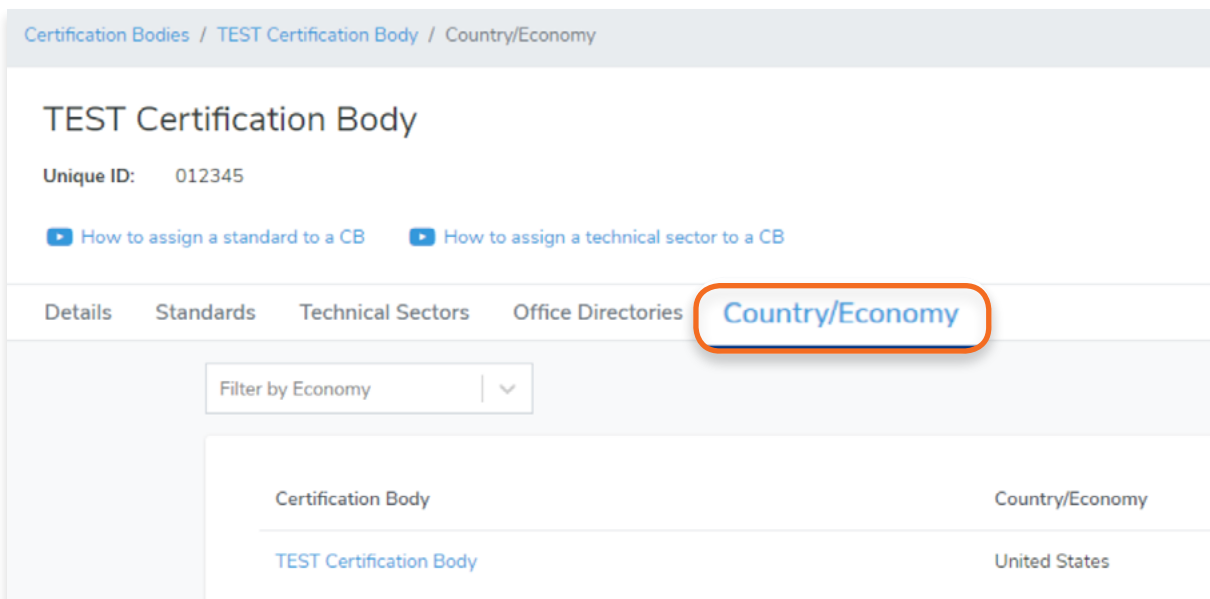
Office Directories

To view Office Directories, click Office Directories in the menu bar.



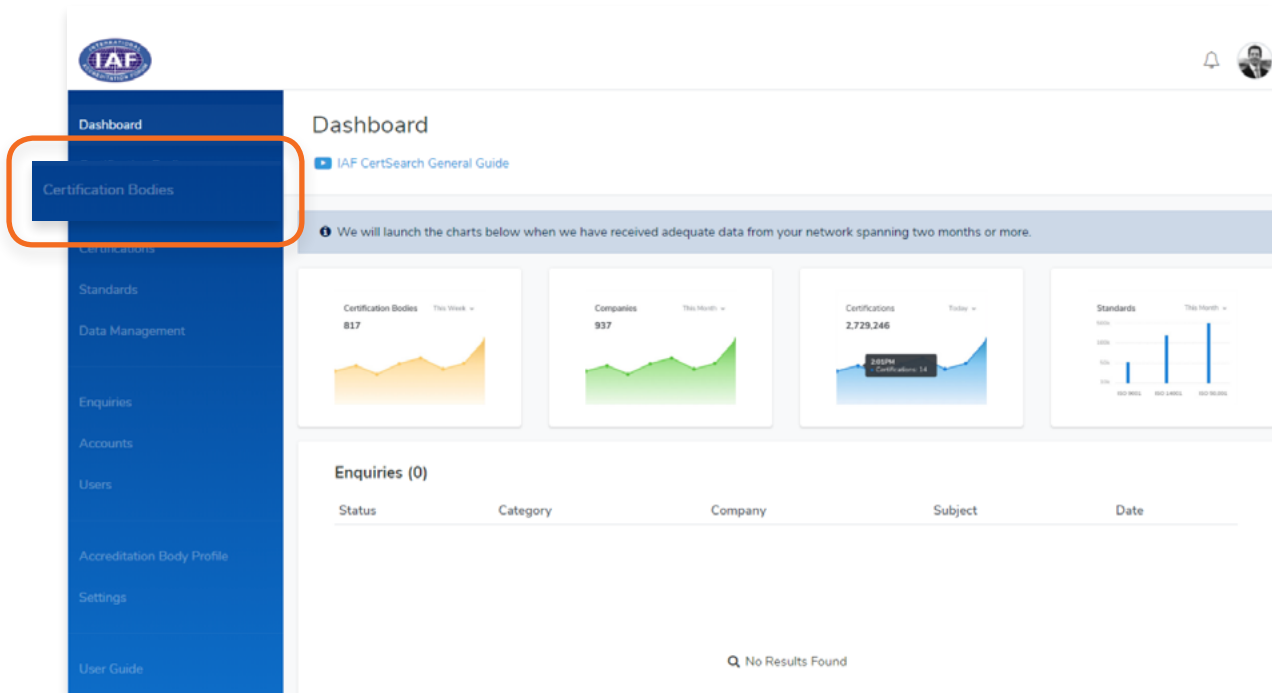
Country/Economy

To view Country/Economy, click Country/Economy in the menu bar.

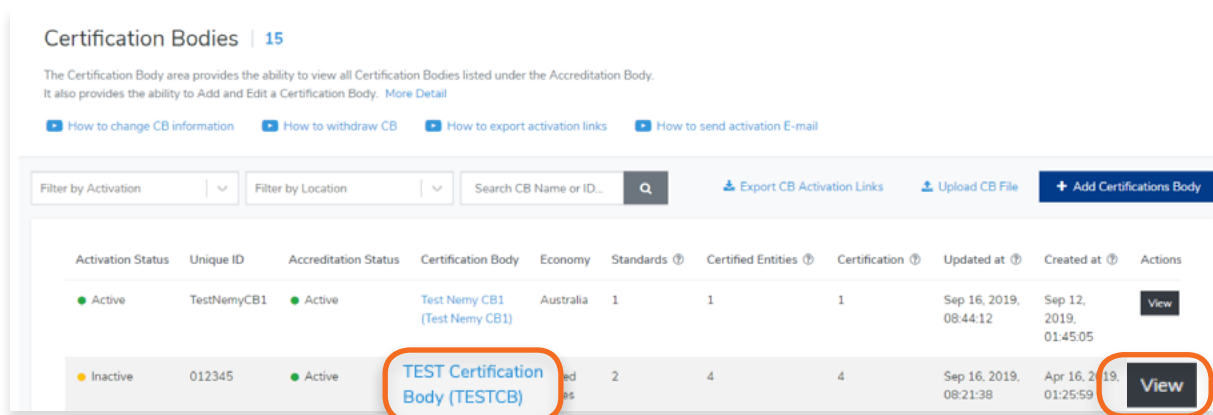


3.3. How to Change Certification Body Details

1. From the Dashboard, click Certification Bodies in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the **Certification Body Name** or Click **View**.



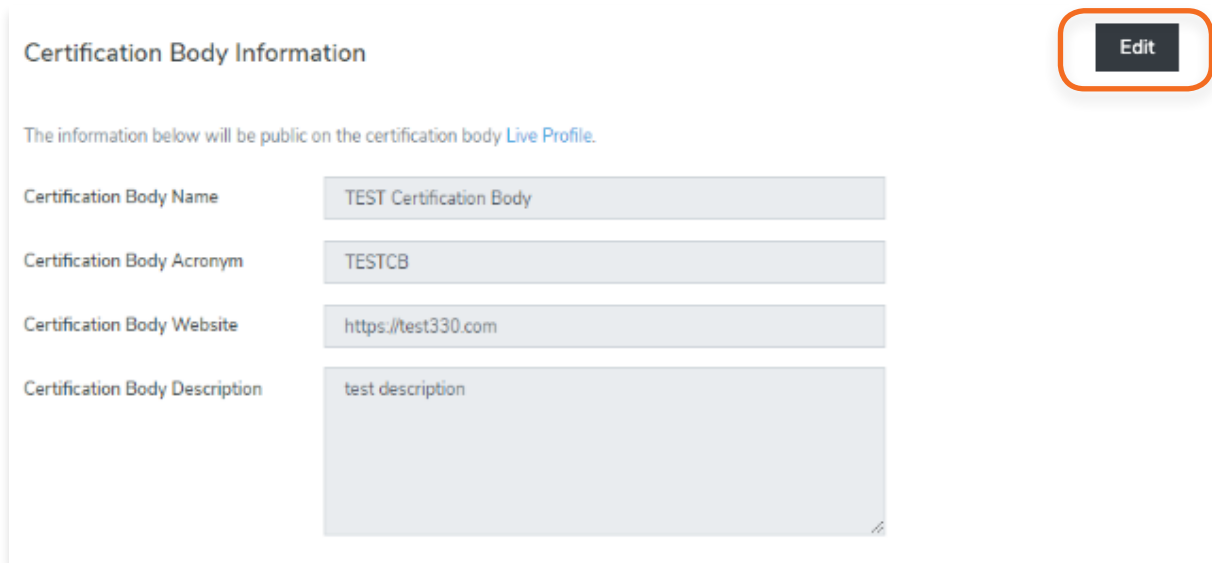
Here you can edit the details per section. Sections are divided into Certification Body Accreditation Status, Economy, Certification Body Information, and Private Information.

The screenshot displays the 'TEST Certification Body' management page. At the top, it shows the unique ID '012345' and two help links: 'How to assign a standard to a CB' and 'How to assign a technical sector to a CB'. Below this is a navigation menu with 'Details' selected, and other options like 'Standards', 'Technical Sectors', 'Office Directories', and 'Country/Economy'.

The main content area is divided into several sections, each with an 'Edit' button on the right:

- Activate Certification Body:** Includes a 'Send Activation Email' button, an 'Activation Link' (https://www.iapcertsearch.org/act/fe1960d4-1b47-5311-), and an 'Email History' table with columns for 'Status' and 'Send date'. The history shows one entry: 'Sent Activation Email' on '2019-04-16 13:28:49'.
- Certification Body Accreditation Status:** Shows 'Active' as the selected status (with 'Withdrawn' as an option). A detailed explanation of accreditation status is provided below the radio buttons.
- Certification Body Logo:** Displays a placeholder image for the certification body logo.
- Certification Body Economy:** A dropdown menu is set to 'United States'. A note states: 'The economy will appear on the Live Profile.'
- Certification Body Information:** A public profile section with fields for 'Certification Body Name' (TEST Certification Body), 'Certification Body Acronym' (TESTCB), 'Certification Body Website' (https://test330.com), and 'Certification Body Description' (test description).
- Private Information:** A section for contact details, including 'Certification Body Email Address' (nigel.johnston+13@qualitytrade.com), 'Key Contact Name' (Nigel), 'Certification Body Phone' (040404040), and 'Certification Body Fax' (040404040).

4. Click **Edit** on the section you want to change.



Certification Body Information **Edit**

The information below will be public on the certification body [Live Profile](#).

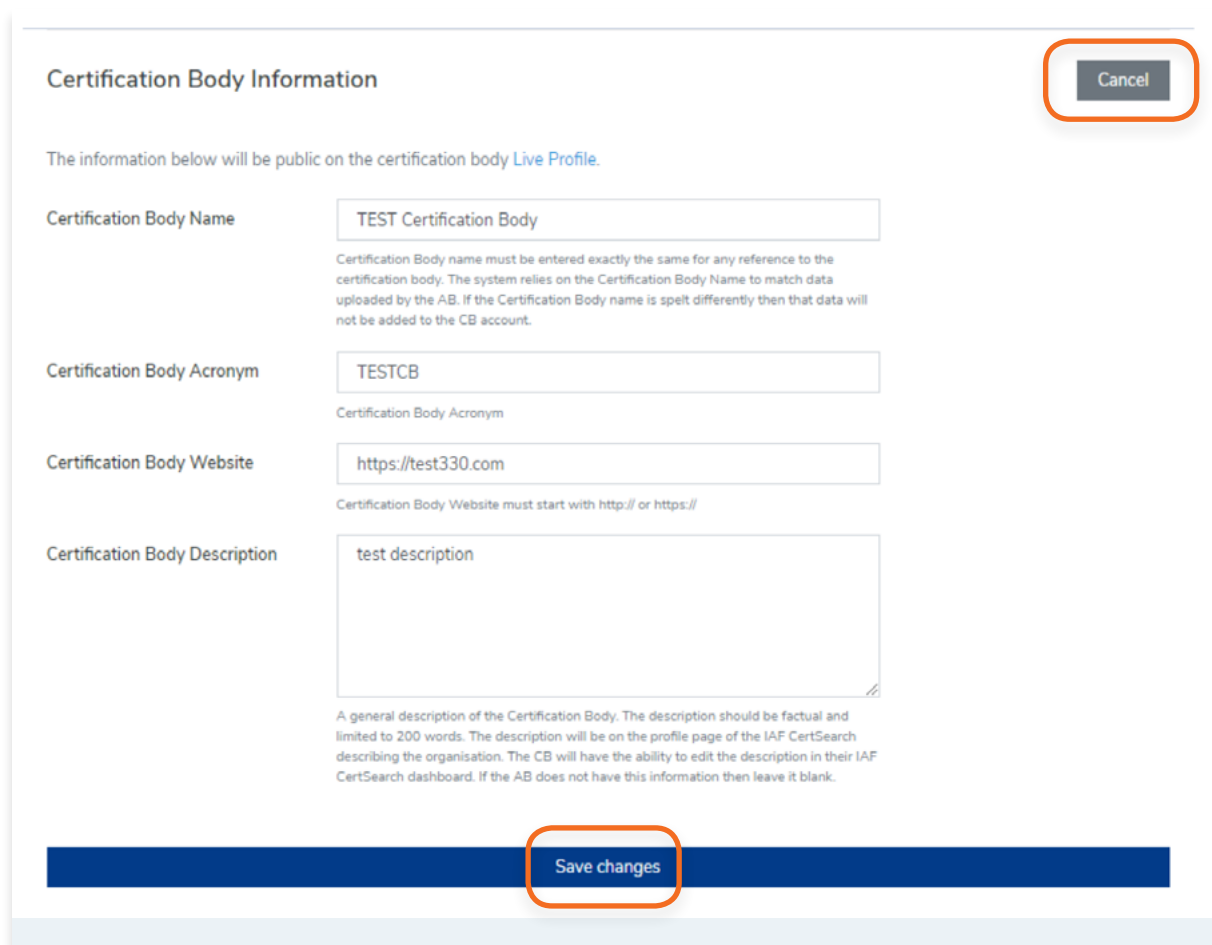
Certification Body Name: TEST Certification Body

Certification Body Acronym: TESTCB

Certification Body Website: https://test330.com

Certification Body Description: test description

5. Click **Save changes** or click **Cancel** to revert changes.



Certification Body Information **Cancel**

The information below will be public on the certification body [Live Profile](#).

Certification Body Name: TEST Certification Body
Certification Body name must be entered exactly the same for any reference to the certification body. The system relies on the Certification Body Name to match data uploaded by the AB. If the Certification Body name is spelt differently then that data will not be added to the CB account.

Certification Body Acronym: TESTCB
Certification Body Acronym

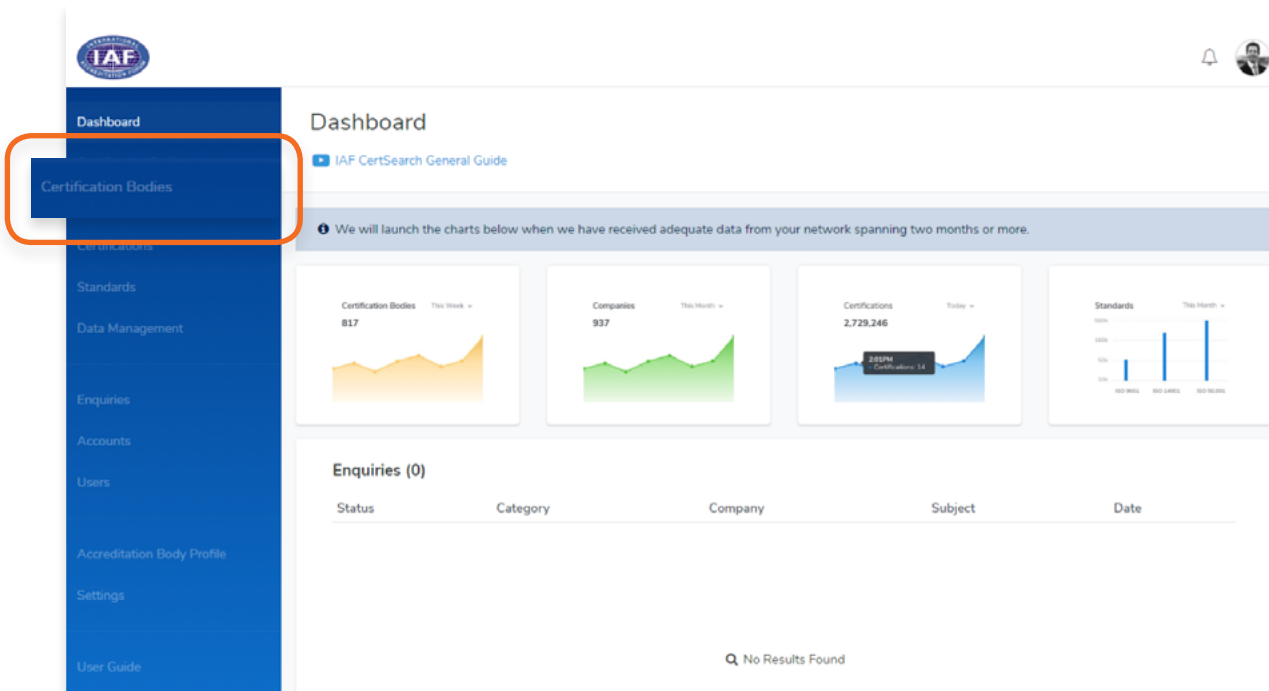
Certification Body Website: https://test330.com
Certification Body Website must start with http:// or https://

Certification Body Description: test description
A general description of the Certification Body. The description should be factual and limited to 200 words. The description will be on the profile page of the IAF CertSearch describing the organisation. The CB will have the ability to edit the description in their IAF CertSearch dashboard. If the AB does not have this information then leave it blank.

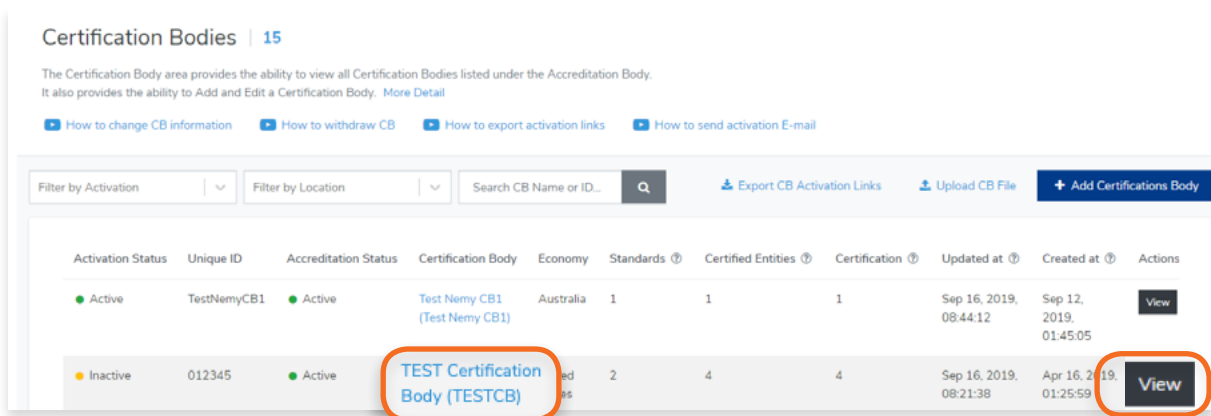
Save changes

3.3.1. How to Edit Certification Body Accreditation Status

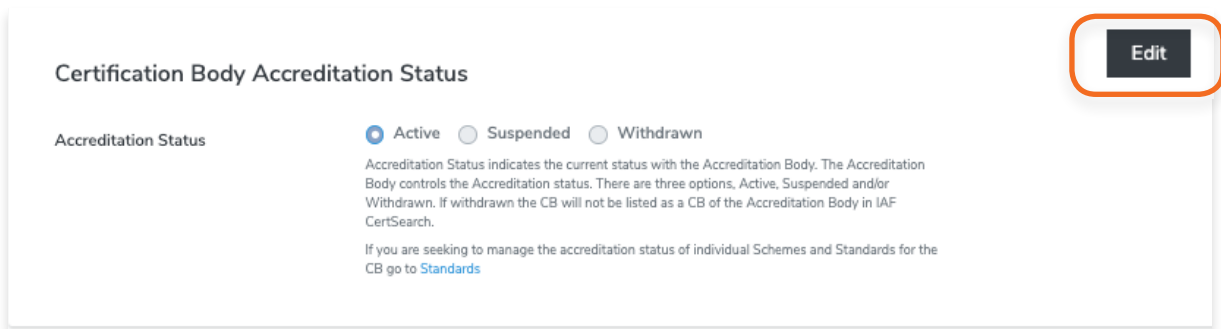
1. From the Dashboard, click Certification Bodies in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the Certification Body Name or Click View.



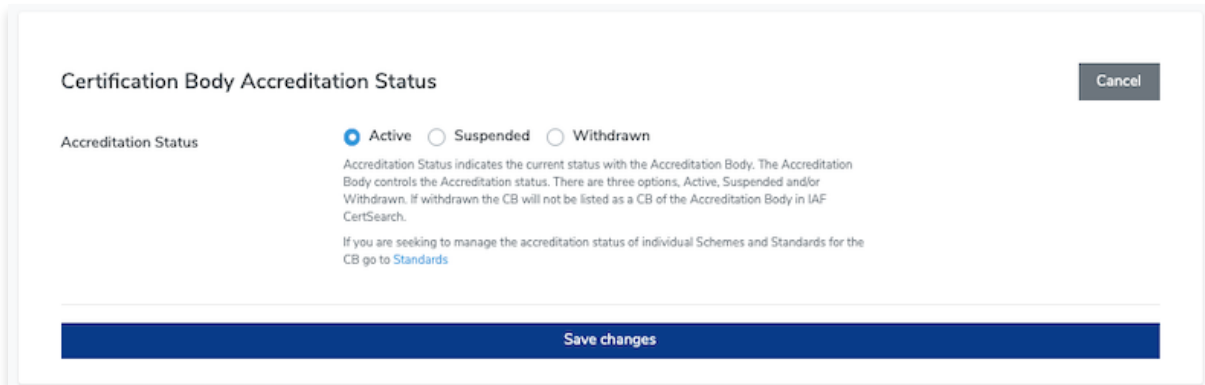
4. Scroll to the Certification Body Accreditation Status and click Edit.



The screenshot shows a form titled "Certification Body Accreditation Status". On the right side, there is a dark grey button labeled "Edit" which is highlighted with an orange rectangular border. Below the title, the "Accreditation Status" section contains three radio buttons: "Active" (which is selected), "Suspended", and "Withdrawn". Below the radio buttons, there is explanatory text: "Accreditation Status indicates the current status with the Accreditation Body. The Accreditation Body controls the Accreditation status. There are three options, Active, Suspended and/or Withdrawn. If withdrawn the CB will not be listed as a CB of the Accreditation Body in IAF CertSearch." At the bottom of this section, there is a link: "If you are seeking to manage the accreditation status of individual Schemes and Standards for the CB go to [Standards](#)".

5. Change the Status to Active or Withdrawn by clicking on the radio buttons. Click Save changes or click Cancel to revert changes.

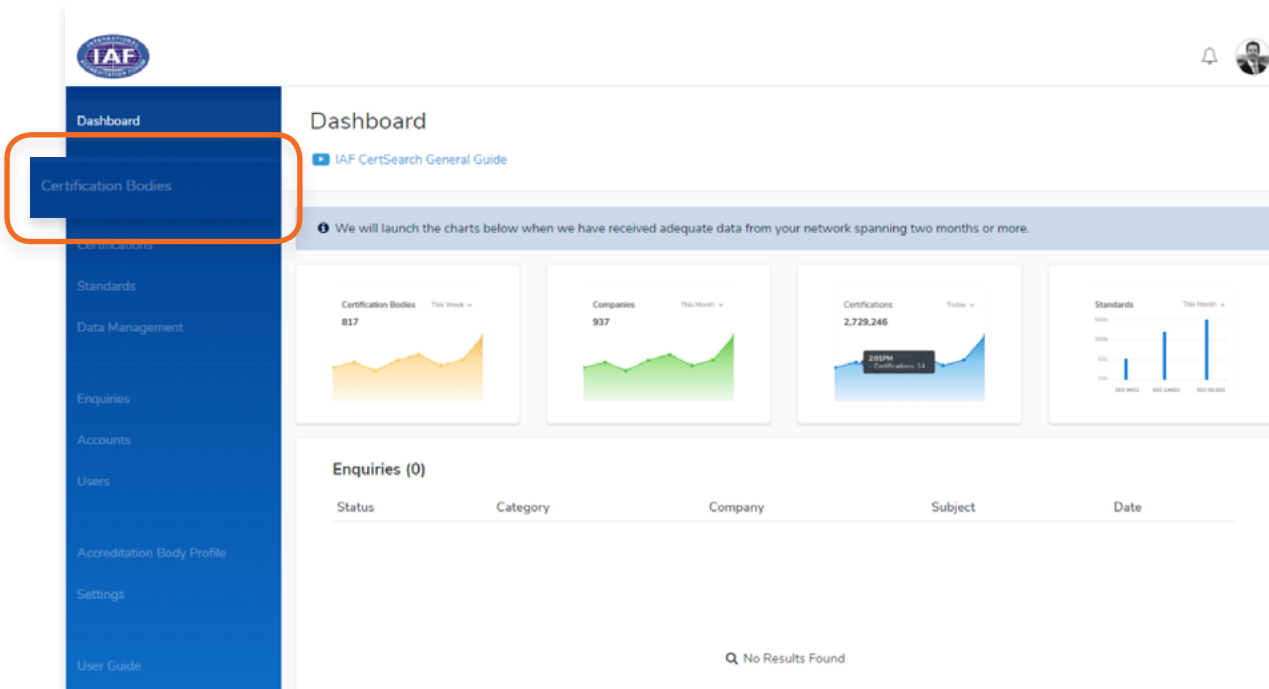
**Accreditation Status indicates the current status with the Accreditation Body. The Accreditation Body controls the Accreditation status. There are three options, Active, Suspended or Withdrawn. If withdrawn the CB will not be listed as a CB of the Accreditation Body in IAF CertSearch. If you need to delete a Certification Body, contact IAF CertSearch administrator.*



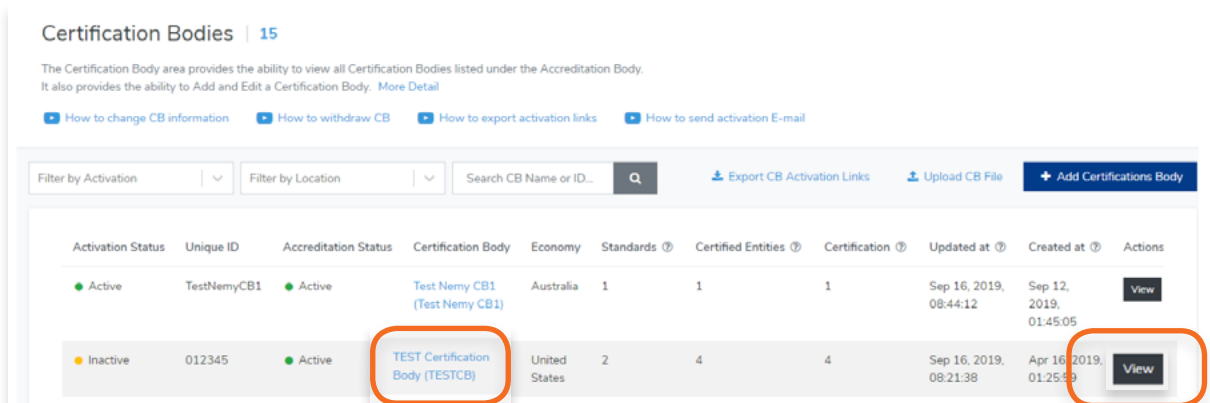
This screenshot shows the same "Certification Body Accreditation Status" form. In this view, the "Active" radio button is selected. A dark grey button labeled "Cancel" is visible in the top right corner. At the bottom of the form, there is a prominent blue button labeled "Save changes". The explanatory text and the "Standards" link are also present in this view.

3.3.2. How to Edit Certification Body Logo

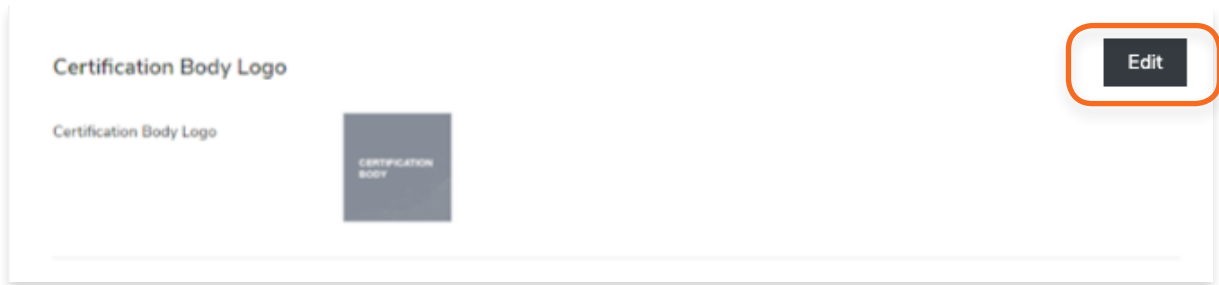
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



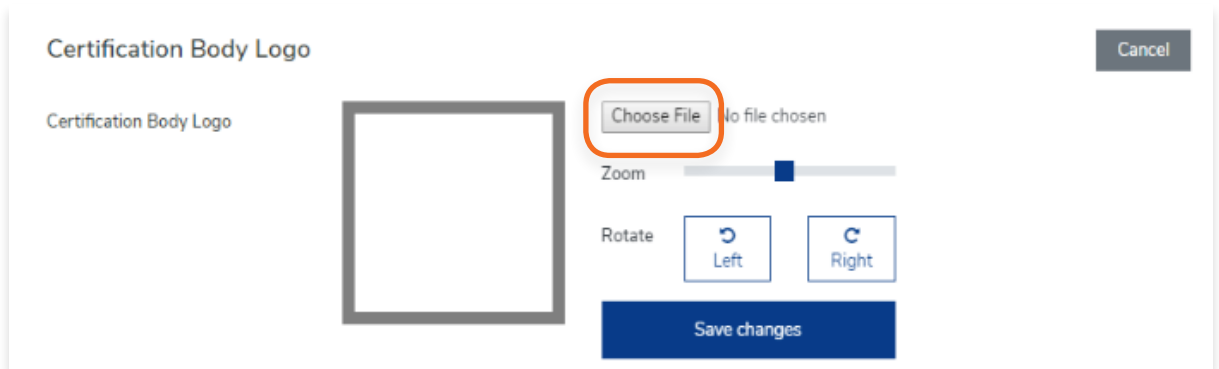
2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the **Certification Body Name** or Click **View**.



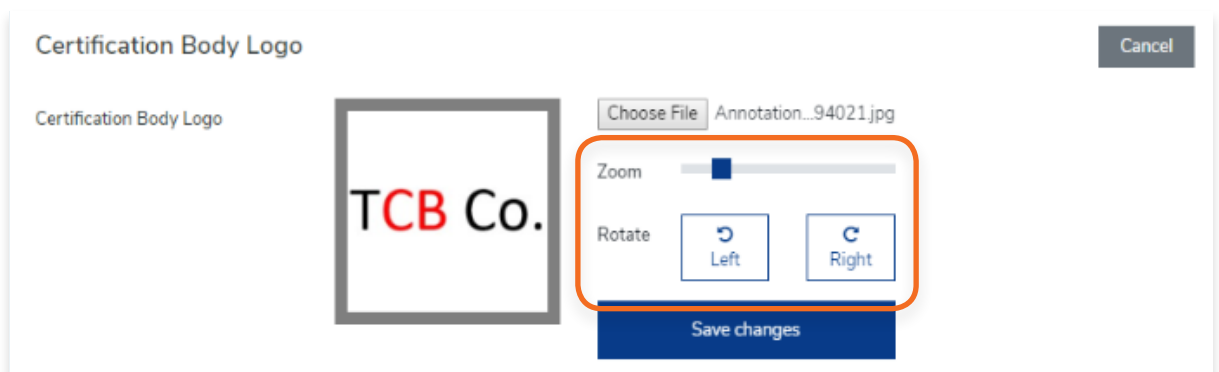
4. Scroll to the **Certification Body Logo** and click **Edit**.



5. Click **Choose File** to select an image that you wish to use. Zoom and Rotate functions are also available to properly adjust the logo image.

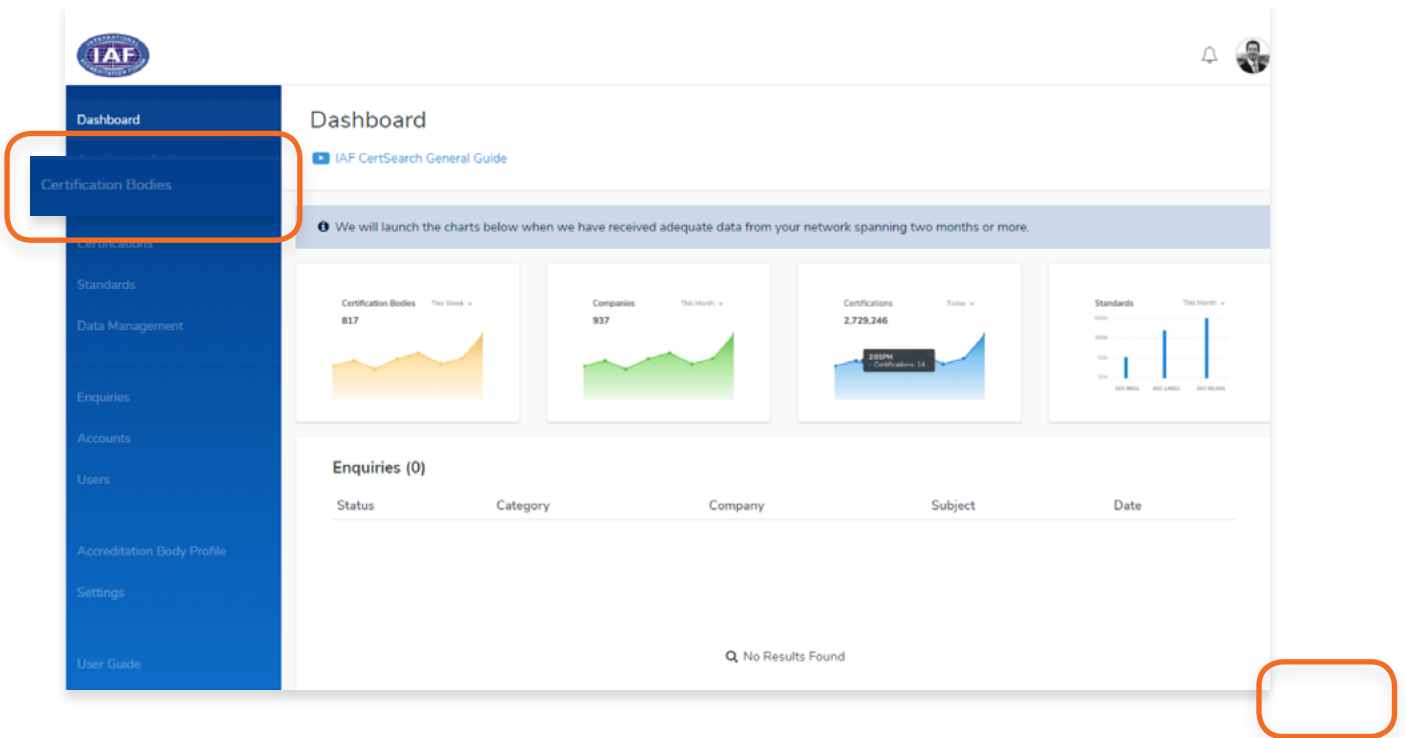


6. Click **Save Changes** once done or click **Cancel** to revert changes.

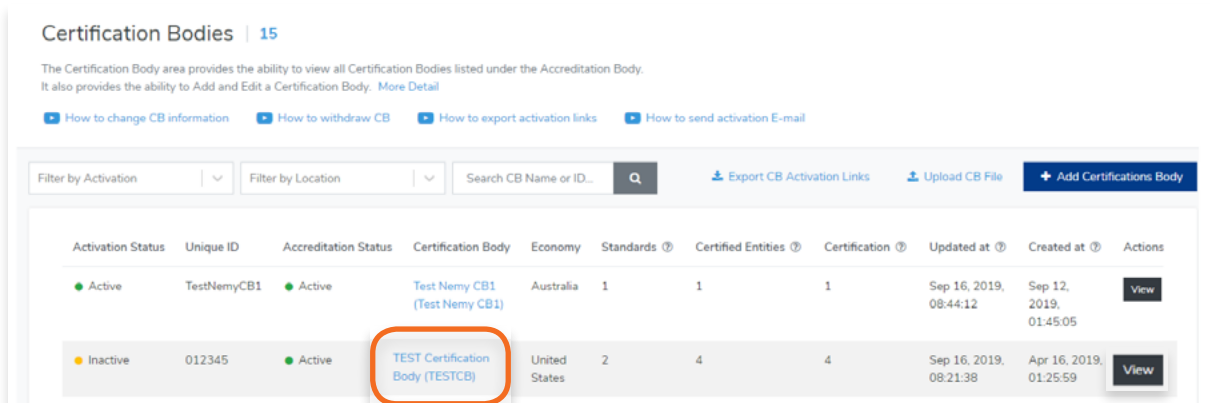


3.3.3. How to Edit Certification Body Economy

1. From the Dashboard, click Certification Bodies in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the Certification Body Name or Click View.



4. Scroll to the Certification Body Economy and click Edit.

5. Select the Country/Economy from the dropdown.

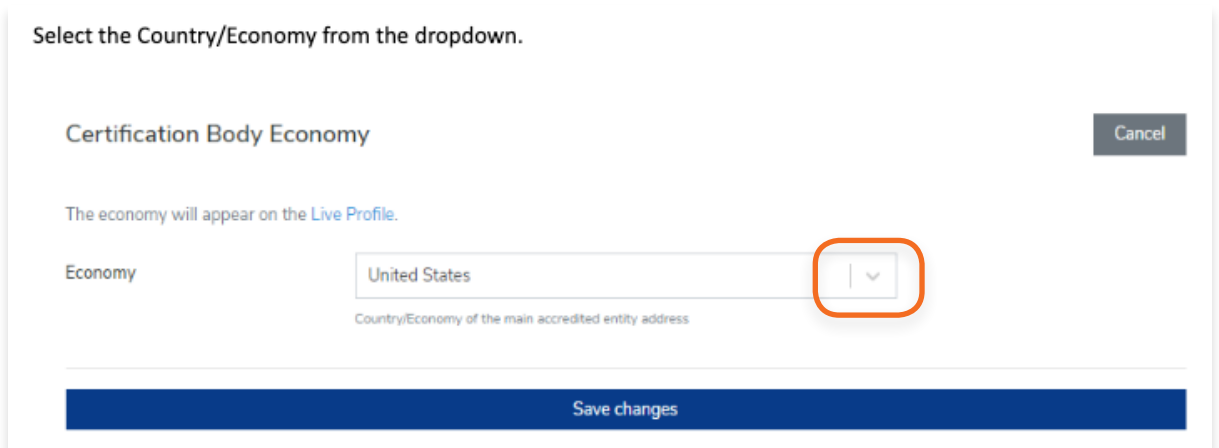


Certification Body Economy **Edit**

The economy will appear on the [Live Profile](#).

Economy

6. Click Save Changes once done or click Cancel to revert changes.



Select the Country/Economy from the dropdown.

Certification Body Economy **Cancel**

The economy will appear on the [Live Profile](#).

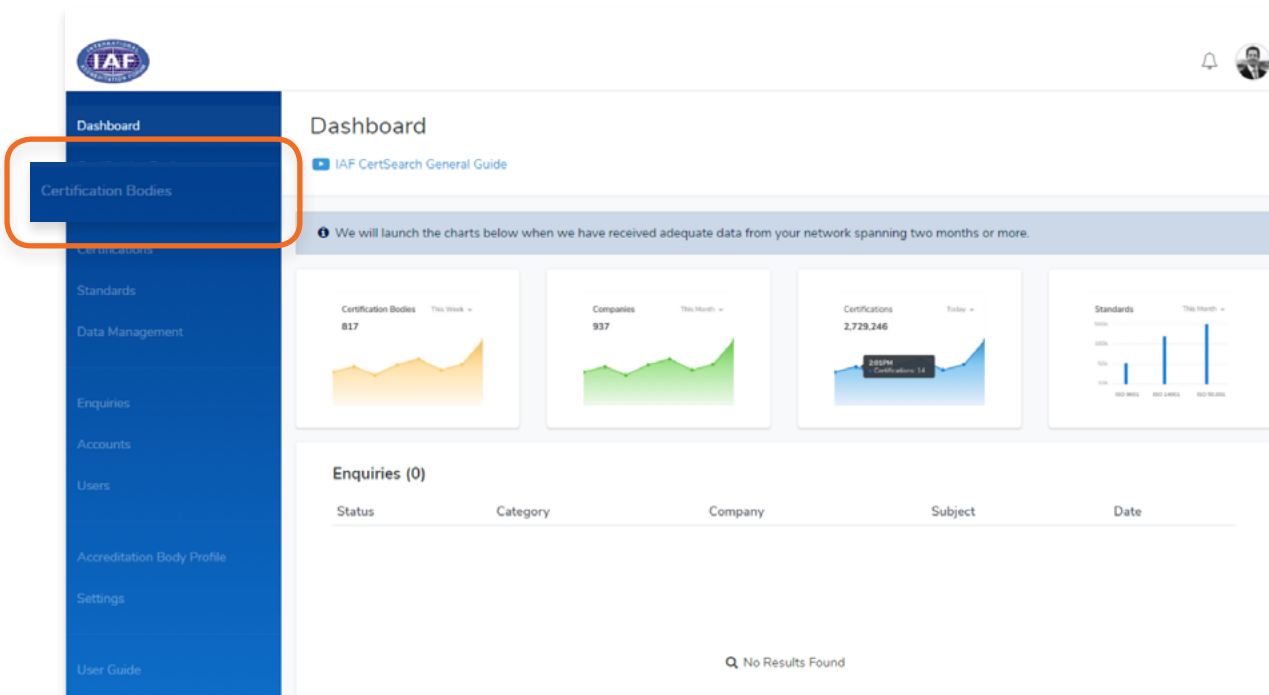
Economy | v

Country/Economy of the main accredited entity address

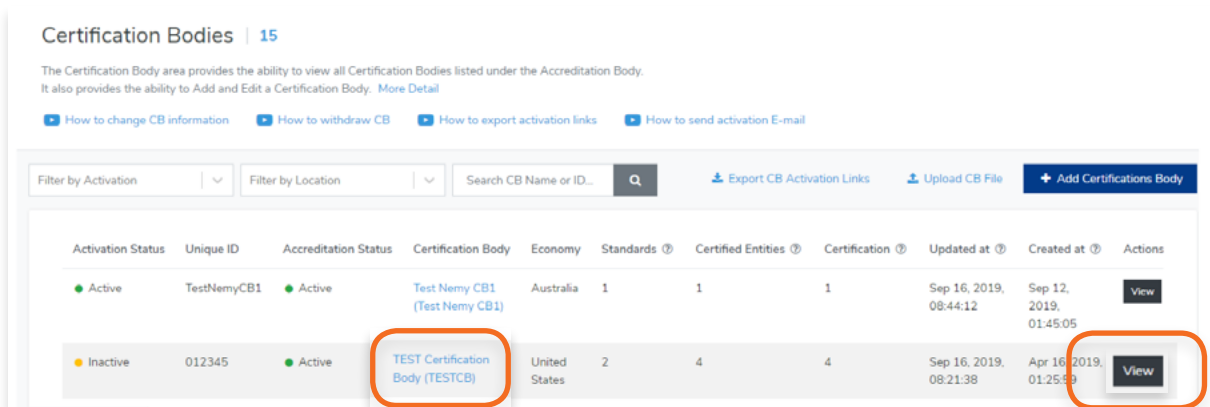
Save changes

3.3.4. How to Edit Certification Body Information

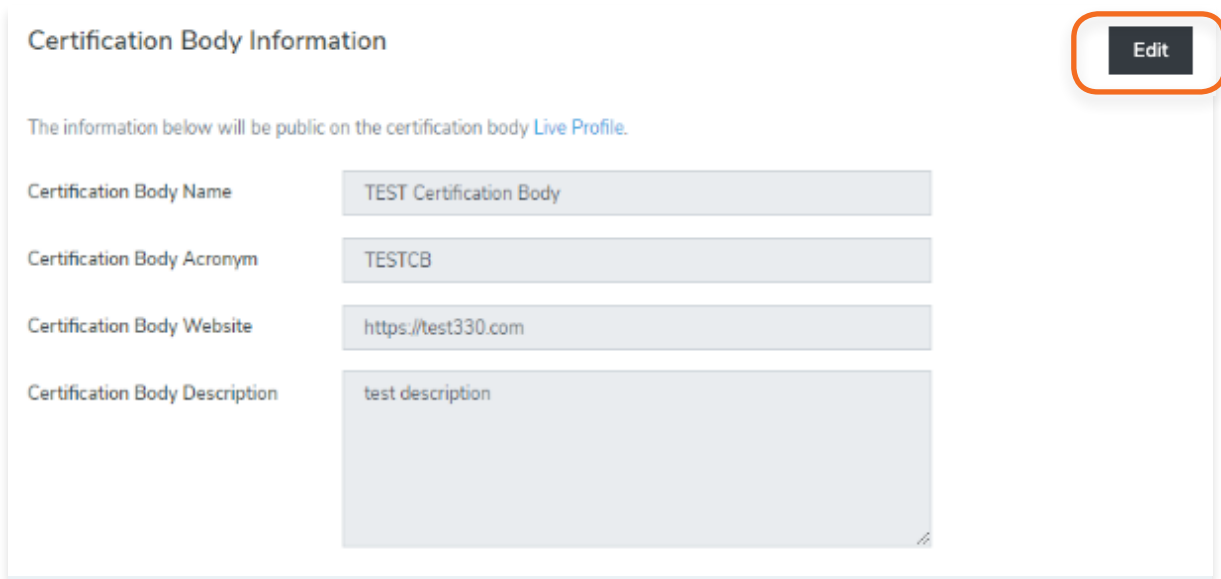
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the **Certification Body Name** or Click **View**.



4. Scroll to the **Certification Body Information** and click **Edit**.

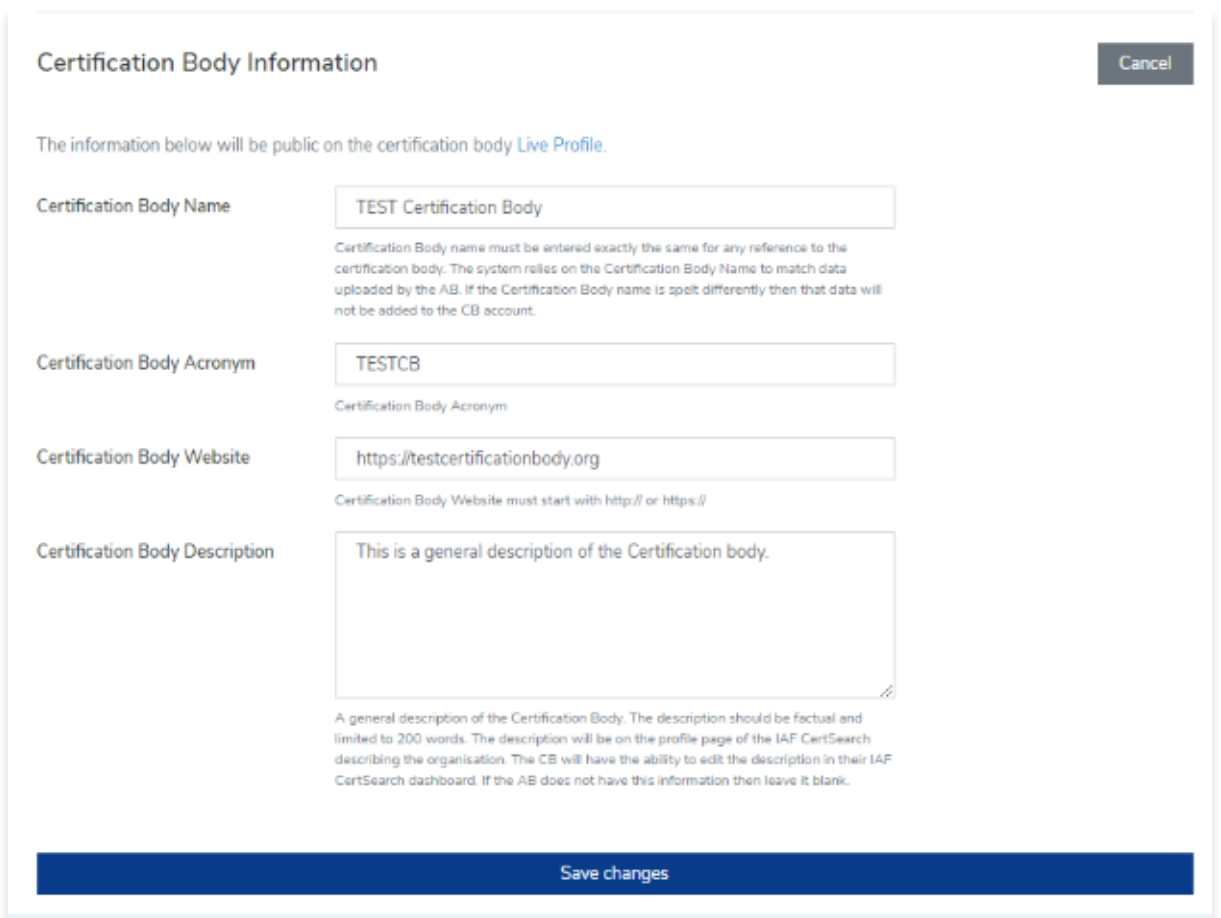


Certification Body Information Edit

The information below will be public on the certification body [Live Profile](#).

Certification Body Name	TEST Certification Body
Certification Body Acronym	TESTCB
Certification Body Website	https://test330.com
Certification Body Description	test description

5. Here you can change the **Certification Body Name, Acronym, Website, and Description**.
6. Click **Save Changes** once done or click **Cancel** to revert changes.



Certification Body Information Cancel

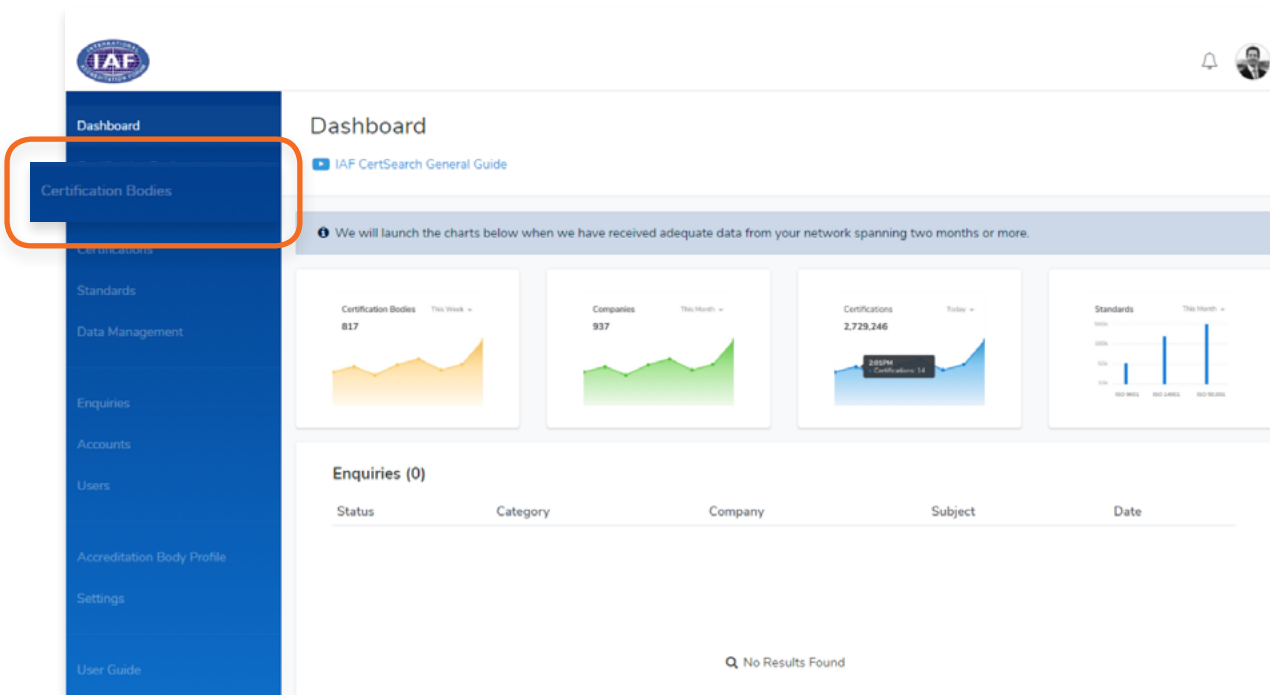
The information below will be public on the certification body [Live Profile](#).

Certification Body Name	TEST Certification Body	<small>Certification Body name must be entered exactly the same for any reference to the certification body. The system relies on the Certification Body Name to match data uploaded by the AB. If the Certification Body name is spelt differently then that data will not be added to the CB account.</small>
Certification Body Acronym	TESTCB	<small>Certification Body Acronym</small>
Certification Body Website	https://testcertificationbody.org	<small>Certification Body Website must start with http:// or https://</small>
Certification Body Description	This is a general description of the Certification body.	<small>A general description of the Certification Body. The description should be factual and limited to 200 words. The description will be on the profile page of the IAF CertSearch describing the organisation. The CB will have the ability to edit the description in their IAF CertSearch dashboard. If the AB does not have this information then leave it blank.</small>

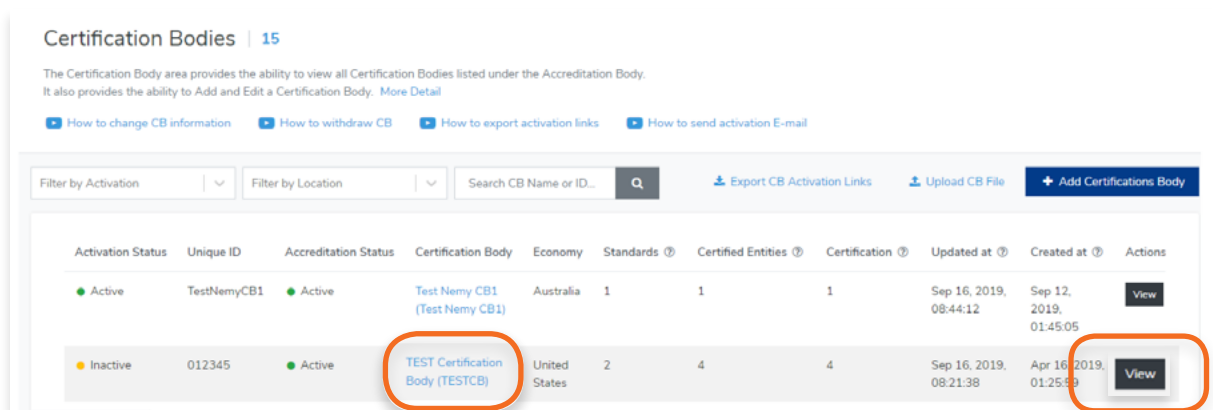
Save changes

3.3.5. How to Edit Private Information

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



2. In the Certification Bodies page, Search for the Certification Body you want to edit.
**If the Activation status is indicated as inactive you are able to change the Certification Body information.*
3. Click on the **Certification Body Name** or Click **View**.



4. Scroll to the **Private Information** section and click **Edit**.

Private Information

Enquiries made via the [Live Profile](#) will be sent to the certification body email address below.

Certification Body Email Address	nigel.johnston+13@qualitytrade.com
Key Contact Name	Nigel
Certification Body Phone	0404040404
Certification Body Fax	040404040

Edit

5. Here you can make changes to the Certification Body Email address, Key Contact Name, Certification Body Phone and Fax.

It is best that you include country and area codes in the phone and fax information.

Private Information

Enquiries made via the [Live Profile](#) will be sent to the certification body email address below.

Certification Body Email Address	diego.beltran@qualitytrade.com
Key Contact Name	Diego Beltran
Certification Body Phone	+61 2 1234 1234
Certification Body Fax	+61 2 1234 12345

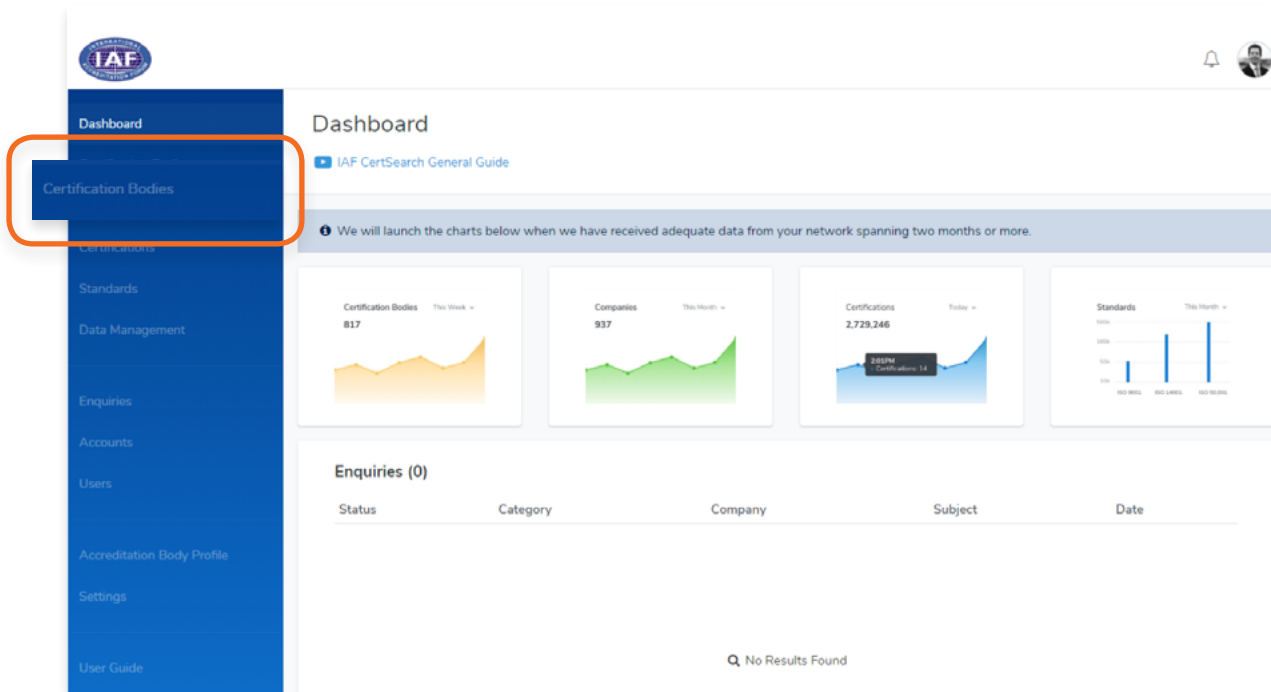
Cancel

Save changes

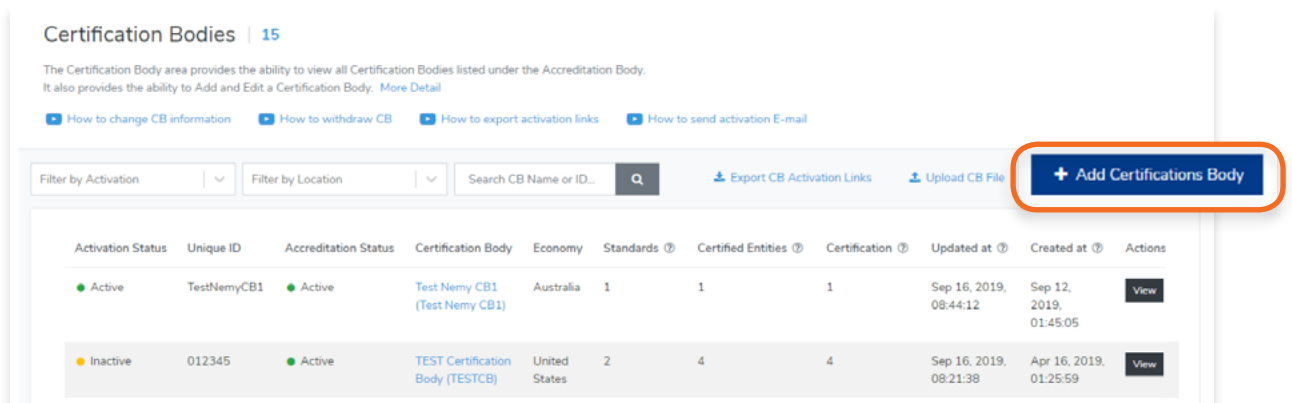
6. Click **Save Changes** once done or click Cancel to revert changes.

3.4. How to add a Certification Body Manually

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



2. Click **+ Add Certification Body**



3. Here you can enter the details of the Certification Body you wish to add. You can add the Certification Body Logo, Economy, Certification Body Information, and Private Information.

The screenshot shows a web form titled "Add Certification Body" with the following sections highlighted by orange boxes:

- Certification Body Logo:** Includes a file upload area with a "Certification Body Logo" label, a "Certification Body" placeholder image, an "Upload" button, and a note: "Maximum size allowed is 500kb of PNG and JPG".
- Certification Body Economy:** Includes a dropdown menu for "Economy" with "United States" selected. A note below reads: "Country/Economy of the main accredited entity address".
- Certification Body Information:** Includes several text input fields: "Certification Body Name", "Certification Body Acronym", "Certification Body Website", and "Certification Body Description". A note states: "The information below will be public on the certification body Live Profile." and "A general description of the Certification Body. The description should be factual and limited to 200 words. The description will be on the profile page of the IAF CertSearch describing the organisation. The CB will have the ability to edit the description in their IAF CertSearch dashboard. If the AB does this information then leave it blank."
- Private Information:** Includes a "Private Information" header with a lock icon, a note: "Enquiries made via the Live Profile will be sent to the certification body email address below.", and several text input fields: "Certification Body Identity Number", "Certification Body Email Address", "Key Contact Name", "Certification Body Phone", and "Certification Body Fax". A note explains: "Mandatory Field provided by the AIJ for internal use of IAF CertSearch. 'CB Identity Number' is a unique identification for the CB. The 'CB Identity Number' makes it possible to identify which CBs are in the AB network what data in the register belongs to the CB. When the AB uploads additional data in the future (i.e. accreditation data) the system will look up the 'CB Identity Number' to maintain integrity of data. The 'CB Identity Number' can be any alpha numeric number." and "Key Contact email. This is a mandatory field. Either a generic email or personal email can be uploaded. Whilst IAF Database LLC has a legitimate interest in obtaining certification, accreditation data and email contact for the purpose of the IAF Database, IAF Database LLC recommend obtaining consent prior to uploading any personal emails. The email is needed so the Certification Body can activate their profile in the IAF CertSearch. Alternatively the AB can send the activation link to the CB directly."

At the bottom of the form is a blue "Submit" button. A final note reads: "By clicking submit below, IAF CertSearch will send an activation link to the certification body email. The email holder is required to click on the link and sign up to activate the certification body."

4. Click **Submit**.

3.5. Activating Certification Bodies

How to export activation links for Certification Bodies:

<https://youtu.be/2-8OHWA0s68>

Each Certification Body receives their own account where they can upload and manage their certification data, receive enquiries, customise their profile, receive their IAF CertSearch Mark, extend invitations to their certified entities.

A Certification Body needs to receive their customised link to activate. They can receive their link via invitation email or directly from the Accreditation Body.

To check the email address and other information go to the Details page of the Certification Body. Follow the instructions below:

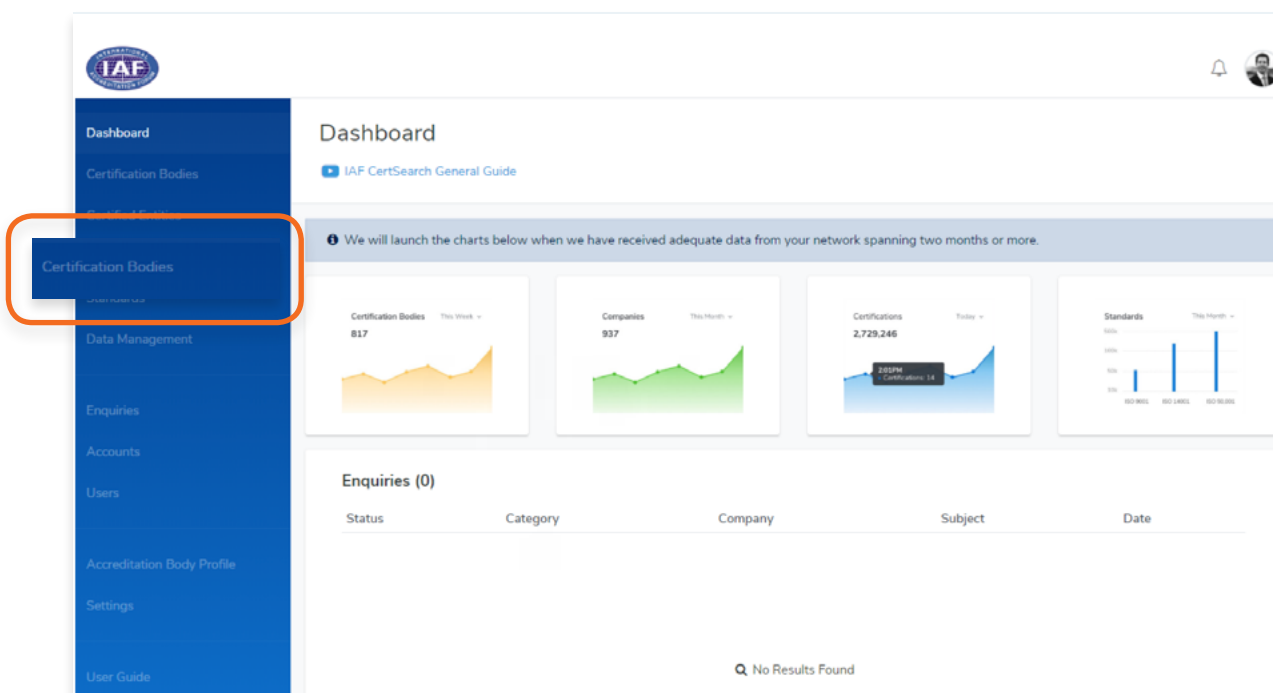
[3.3 How to change Certification Body Details](#)

To edit the email address go to the Details page of the Certification Body. Follow the instructions below:

[3.3.5 How to edit Private Information](#)

3.5.1. How to Send an Activation Email to a Certification Body

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



The screenshot displays the IAF CertSearch dashboard. On the left, a blue navigation sidebar contains several menu items. The 'Certification Bodies' item is highlighted with an orange rectangular box. The main content area of the dashboard shows a 'Dashboard' header with a link to the 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four data visualization charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. At the bottom, there is an 'Enquiries (0)' section with a table header including Status, Category, Company, Subject, and Date. A search icon and 'No Results Found' message are visible at the bottom right of the page.

3.5.1. How to Send an Activation Email to a Certification Body

2. Find the Certification Body you wish to activate.
3. Click on the Certification Body Name or Click **View**.

Certification Bodies | 15

The Certification Body area provides the ability to view all Certification Bodies listed under the Accreditation Body. It also provides the ability to Add and Edit a Certification Body. [More Detail](#)

[How to change CB information](#) [How to withdraw CB](#) [How to export activation links](#) [How to send activation E-mail](#)

Filter by Activation Filter by Location Search CB Name or ID... [Export CB Activation Links](#) [Upload CB File](#) [+ Add Certifications Body](#)

Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification	Updated at	Created at	Actions
Active	TestNemyCB1	Active	Test Nemy CB1 (Test Nemy CB1)	Australia	1	1	1	Sep 16, 2019, 08:44:12	Sep 12, 2019, 01:45:05	View
Inactive	012345	Active	TEST Certification Body (TESTCB)	United States	2	4	4	Sep 16, 2019, 08:21:38	Apr 16, 2019, 01:25:39	View

4. Click **Send Activation Email** button.

Activate Company


Activation Email [Send Activation Email](#)

Activation Link <https://www.iafcertsearch.org/act/db40a7a6-0093-5cc7-> [Copy link](#)

Email History

Status	Send date
--------	-----------

5. A confirmation will appear when the invitation has been sent.



Success

Activation email has been sent to the account email.

[OK](#)

6. The logs of the emails will be recorded.

Activate Company

Activation Email [Send Activation Email](#)

Activation Link <https://www.iafcertsearch.org/act/db40a7a6-0093-5cc7-> [Copy link](#)

Email History

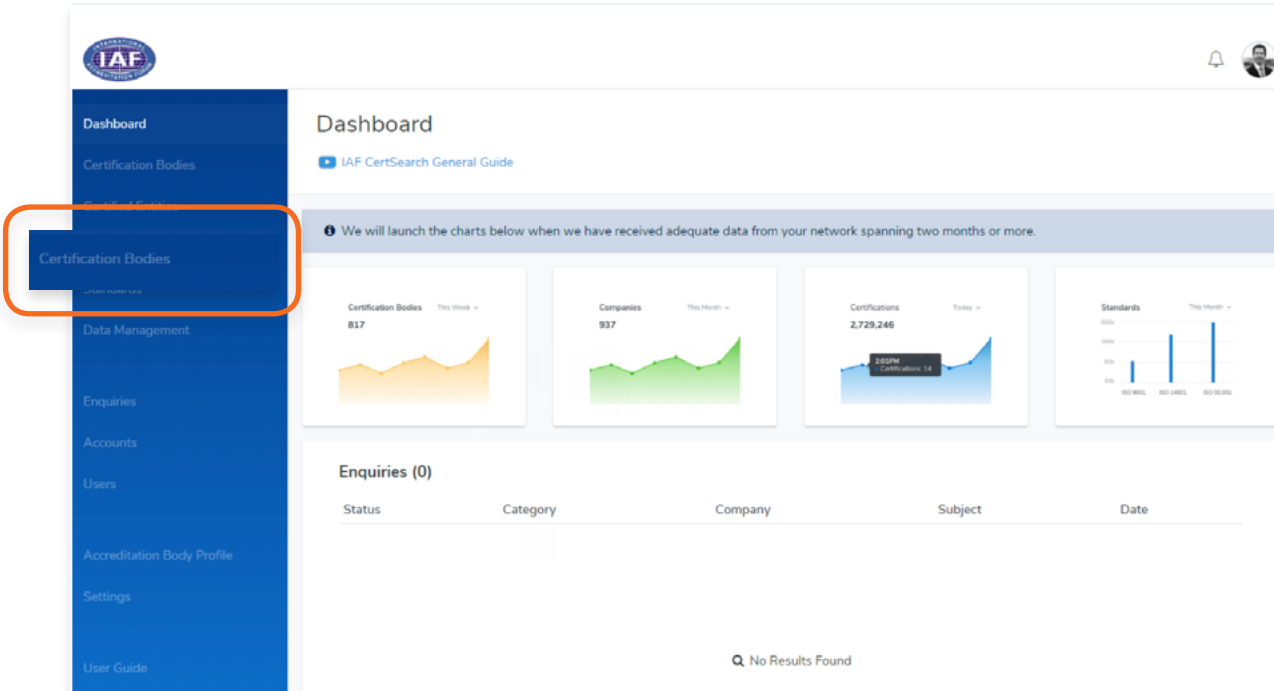
Status	Send date
Sent Activation Email	2019-09-12 10:52:02

3.5.2. How to Generate Activation of a Certification Body

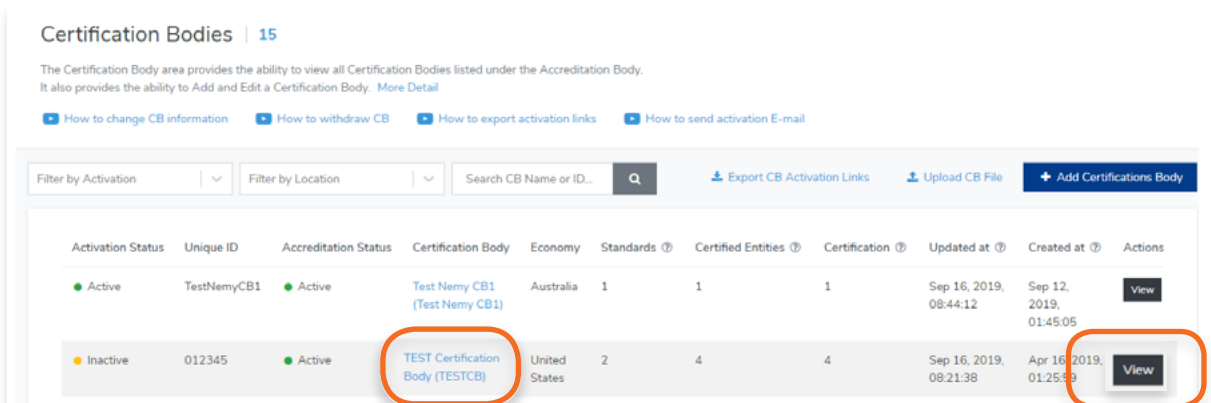
View the step by step guide below or watch the video guide here:

https://youtu.be/8DBor2dvR_Q

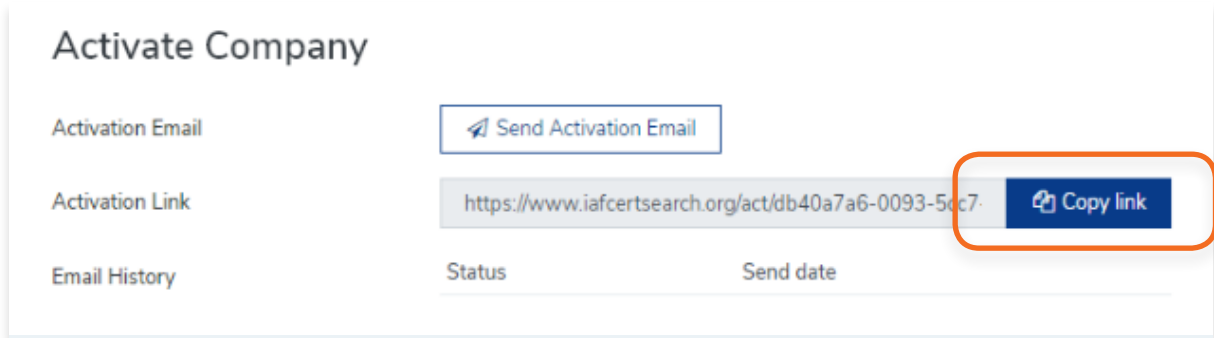
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



2. Find the Certification Body you wish to activate.
3. Click on the **Certification Body Name** or Click **View**.



4. Click **“Copy link”** and send the link to the Certification Body directly. Export links are valid for one month if emailed and then they expire and a new link will be generated.

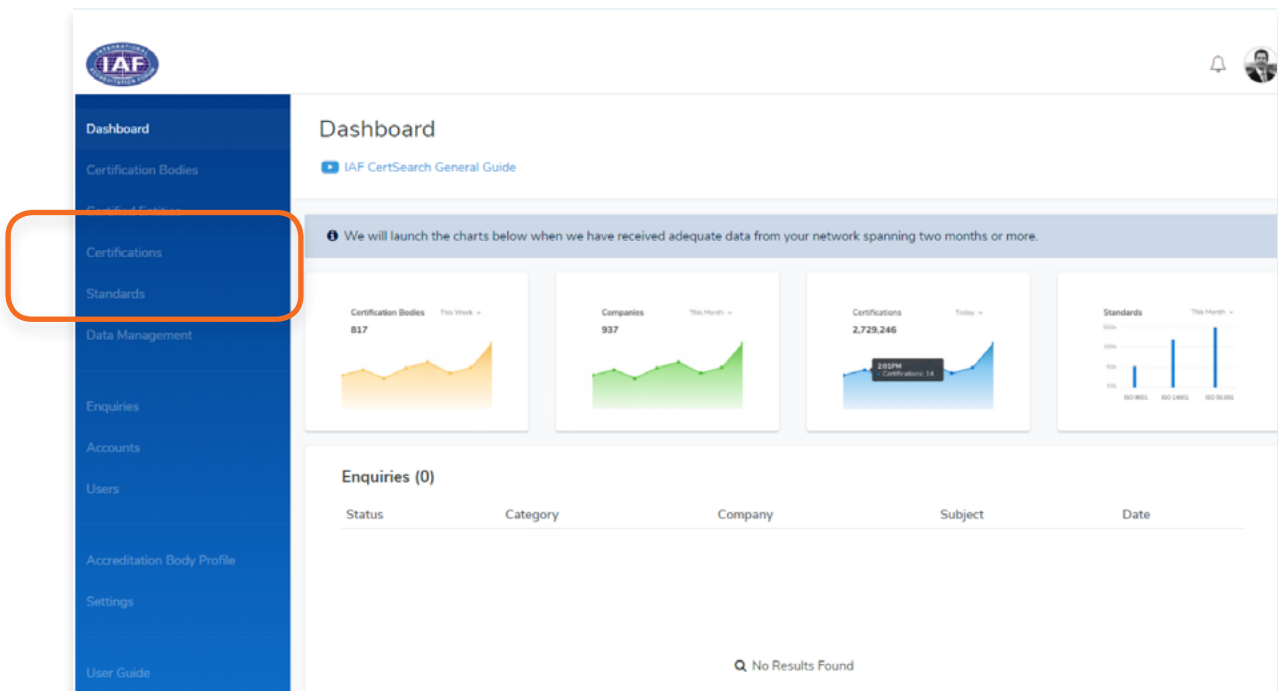


3.5.3. How to export Activation Links for all Certification Body

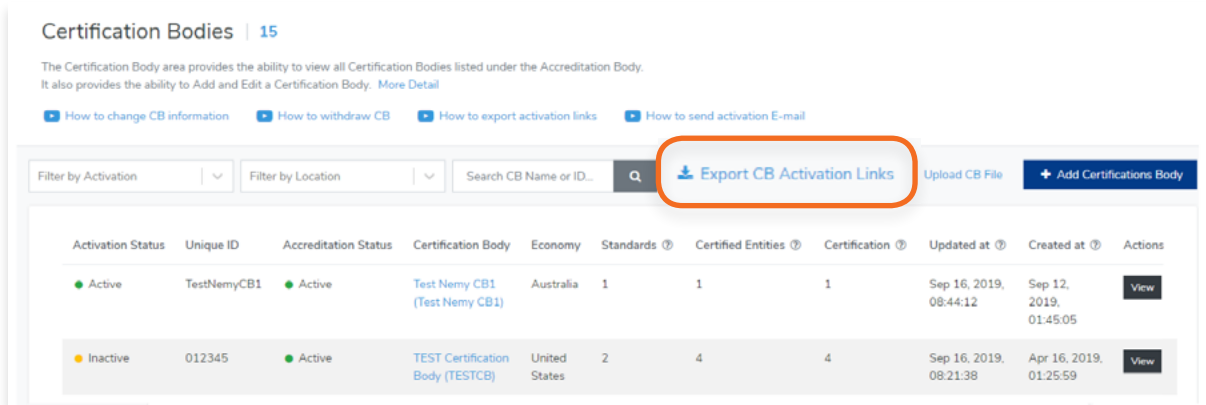
View the step by step guide below or watch the video guide here:

<https://youtu.be/2-8OHWA0s68>

1. From the Dashboard, click Certification Bodies in the left hand navigation.



2. Click **Export CB Activation Links**.



A CSV (Comma Separated Values) file will automatically download. You can open this file using Microsoft Excel or any similar application or program. Once the file is open, you will see the Inactive Certification Bodies in Column A and the corresponding Activation Link in Column B. Keep in mind that these Activation Links are unique to each Certification Body. Make sure you are sending the right Activation link to the right Certification Body.

	A	B
1	Certification Global Inc	https://www.iafcertsearch.org/act/1ec023c1-b39c-5e3f-8517-45b9d5d8bb98
2	Global Compliance Plus Pty Ltd	https://www.iafcertsearch.org/act/7c742fb9-c94c-52c1-941c-4eaf80ab822d
3	TEST Certification Body	https://www.iafcertsearch.org/act/fe19b0d4-f847-5311-ba4a-544ba0aa362f

Note : Export links are valid for one month and then they expire and a new link will be generated.

3. Instruct the Certification Body you wish to send the Activation Link to paste the link to a web browser

4. Once the Certification Body enters the link, they will be directed to the Activation page.

Certification Body Activation
Continue to create an account under TEST Certification Body

Company Name
TEST Certification Body

Email Address
dondiego.beltran@gmail.com

First Name
Diego

Last Name
Beltran

Create Password
.....

Confirm Password
.....

Create an Account

5. After creating an account, they will be able to log in the IAF CertSearch

Log in
Please log in to your account

Email Address
dondiego.beltran@gmail.com

Password
.....

Remember me

Log in

[Forgot password?](#)

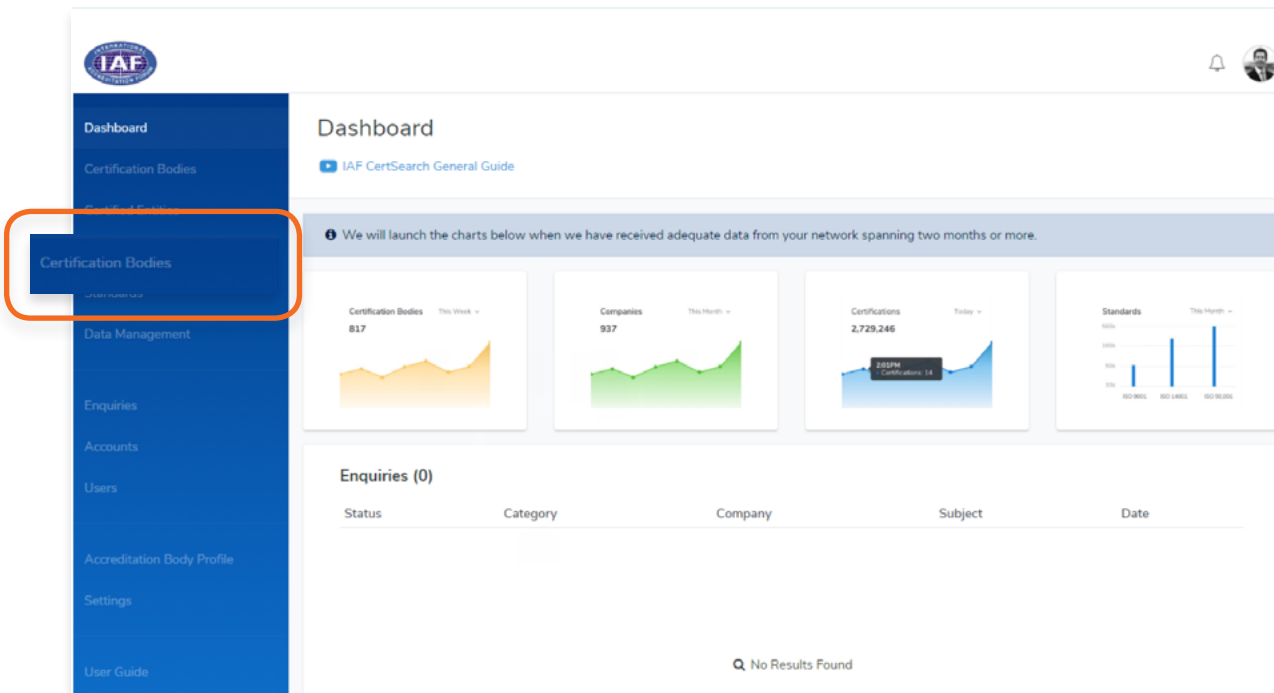
If you have any questions, please email us at info@iafcertsearch.org

3.6. How to Withdraw a Certification Body

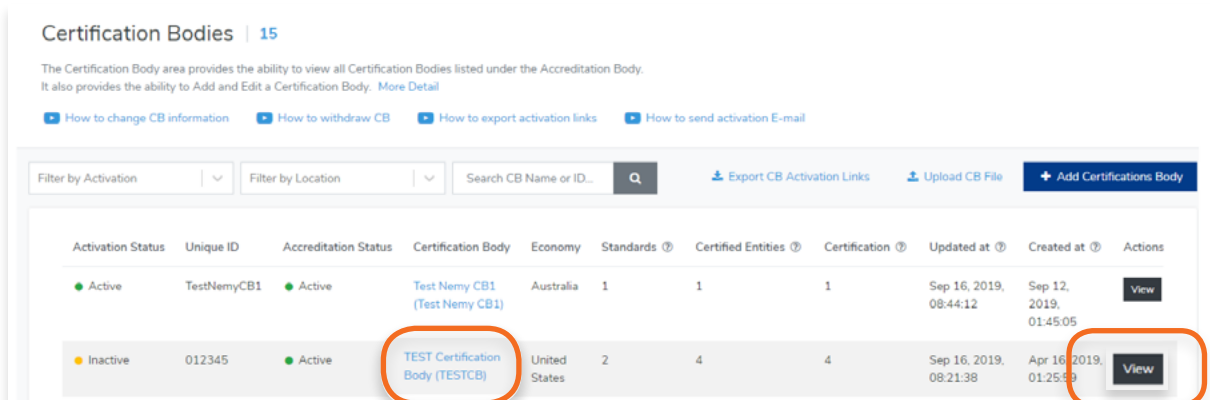
View the step by step guide below or watch the video guide here:

https://youtu.be/8DBor2dvR_Q

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



2. Find the Certification Body you wish to withdraw.
3. Click on the **Certification Body Name** or Click **View**.



4. Scroll to the **Certification Body Accreditation Status** and click **Edit**.

Certification Body Accreditation Status

Accreditation Status Active Suspended Withdrawn

Accreditation Status indicates the current status with the Accreditation Body. The Accreditation Body controls the Accreditation status. There are three options, Active, Suspended and/or Withdrawn. If withdrawn the CB will not be listed as a CB of the Accreditation Body in IAF CertSearch.

If you are seeking to manage the accreditation status of individual Schemes and Standards for the CB go to [Standards](#)

Change the Status from Active to Withdrawn by clicking on the radio buttons. Click **Save changes** or click **Cancel** to revert changes.

**Accreditation Status indicates the current status with the Accreditation Body. The Accreditation Body controls the Accreditation status. There are three options, Active, Suspended or Withdrawn. If withdrawn the CB will not be listed as a CB of the Accreditation Body in IAF CertSearch. If you need to delete a Certification Body, contact IAF CertSearch administrator.*

Certification Body Accreditation Status Cancel

Accreditation Status Active Suspended Withdrawn

Accreditation Status indicates the current status with the Accreditation Body. The Accreditation Body controls the Accreditation status. There are three options, Active, Suspended and/or Withdrawn. If withdrawn the CB will not be listed as a CB of the Accreditation Body in IAF CertSearch.

If you are seeking to manage the accreditation status of individual Schemes and Standards for the CB go to [Standards](#)

Save changes

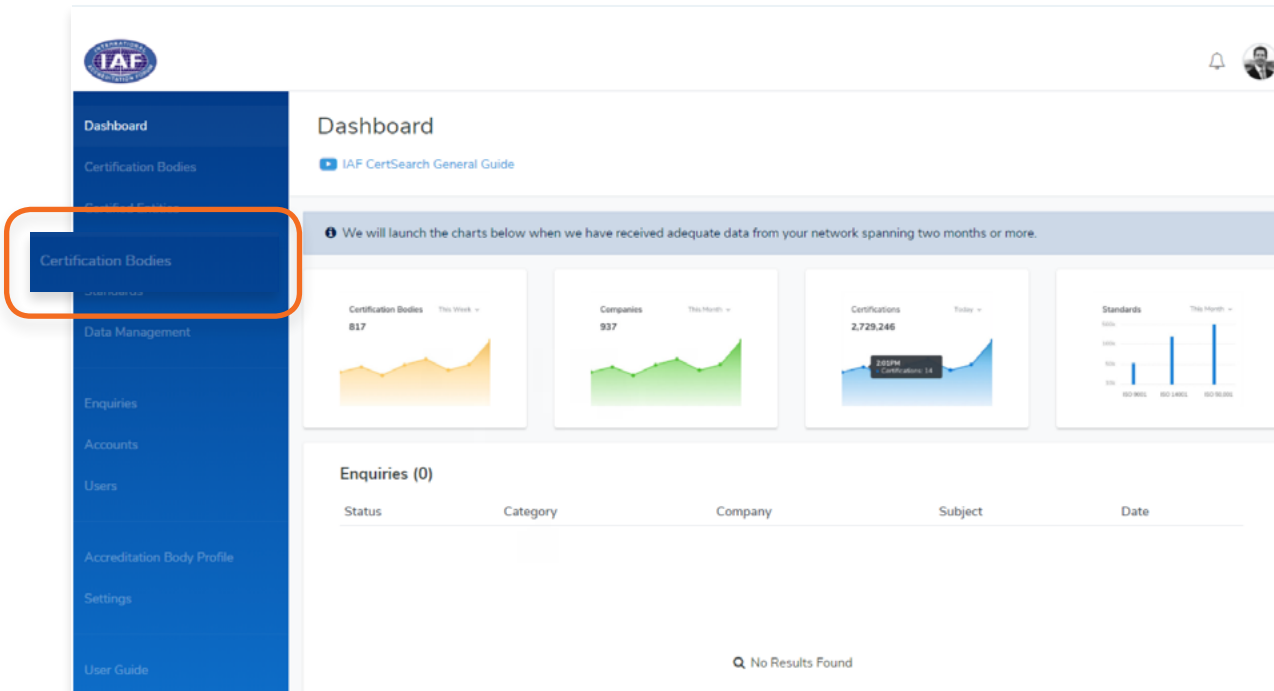
5. Click **Save changes** or click **Cancel** to revert changes.

3.7. How to Assign a Standard to a Certification Body

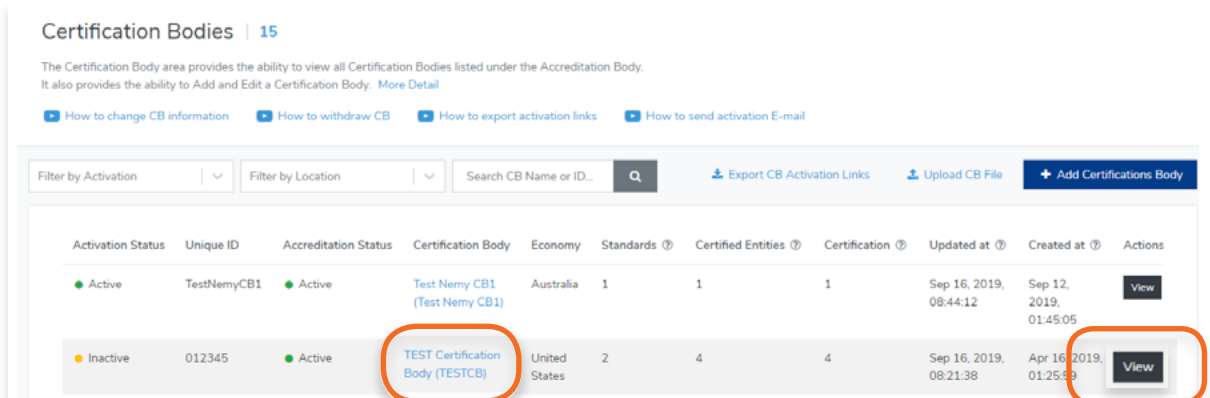
View the step by step guide below or watch the video guide here:

https://youtu.be/8DBor2dvR_Q

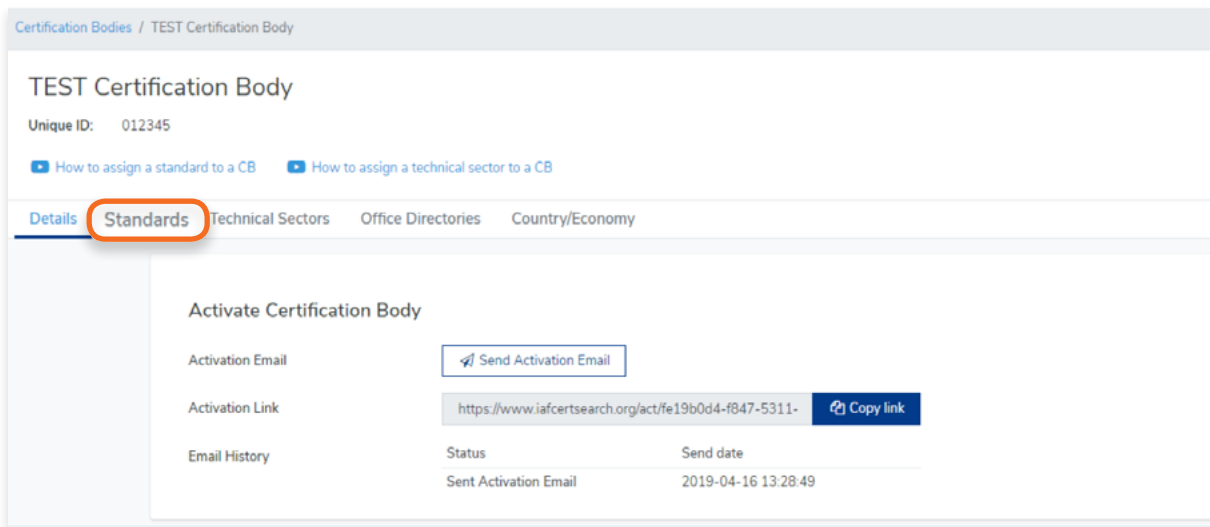
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



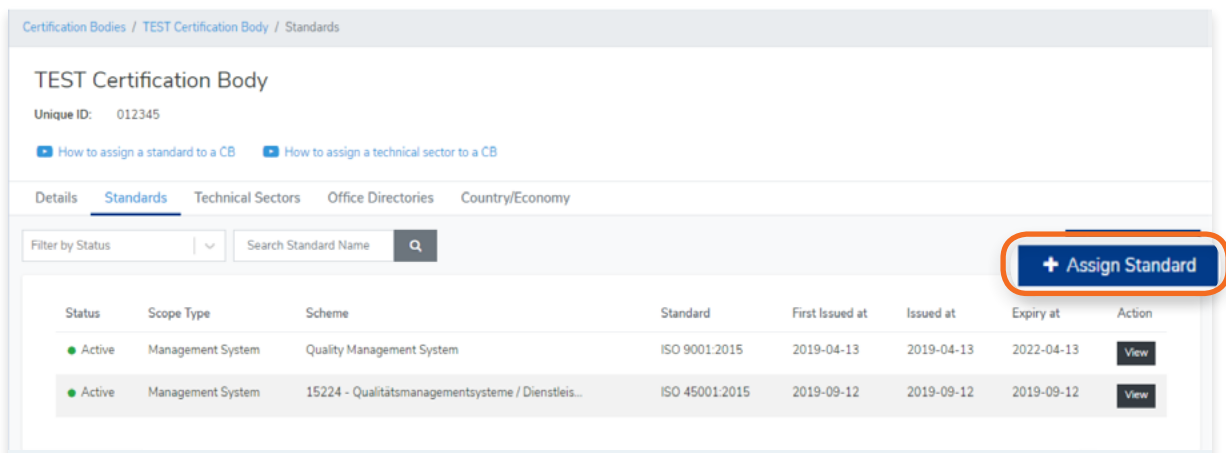
2. Find the Certification Body you wish to edit.
3. Click on the **Certification Body Name** or Click **View**.



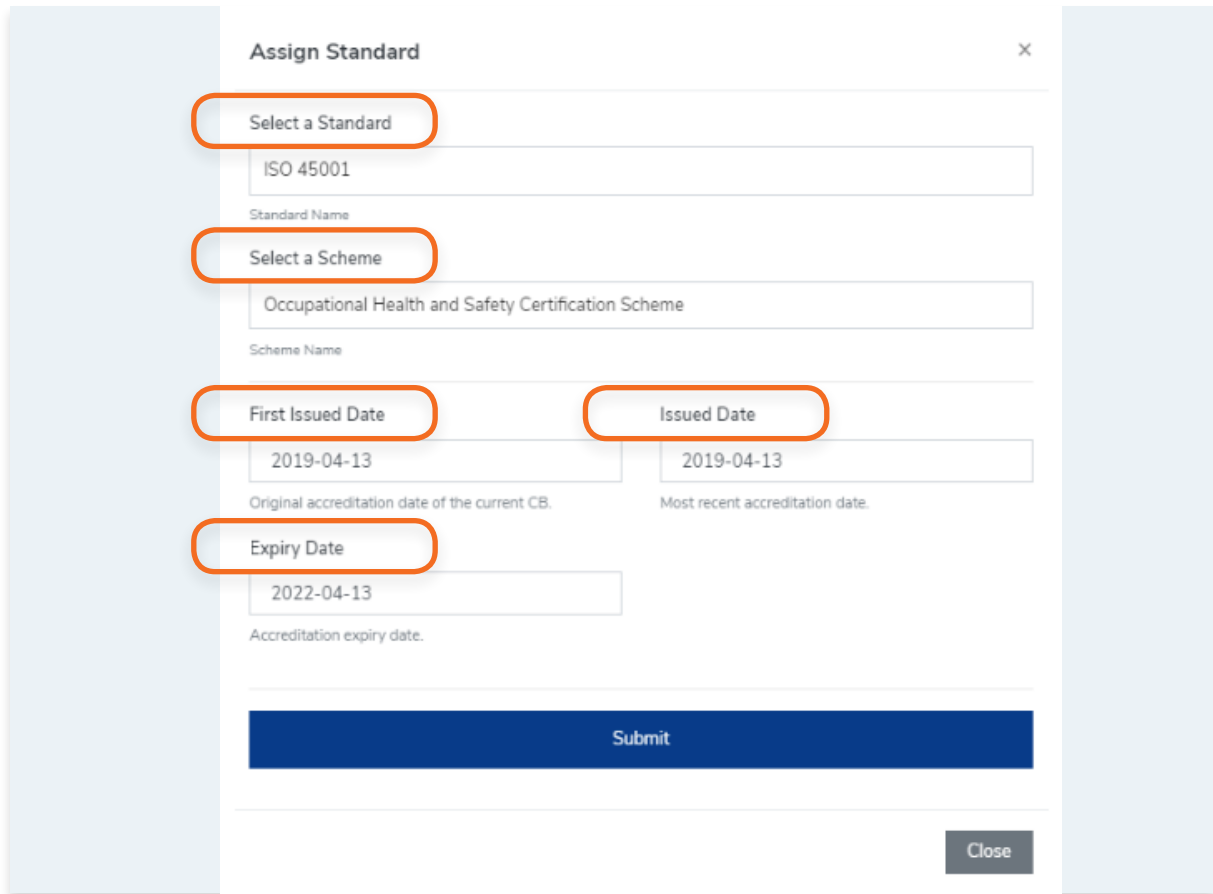
4. Click **Standards** on the menu bar



5. Click **+ Assign Standard**



6. Select the **Standard** followed by the **Scheme**.
7. Enter the First Issued Date, Issued Date and Expiry Date.

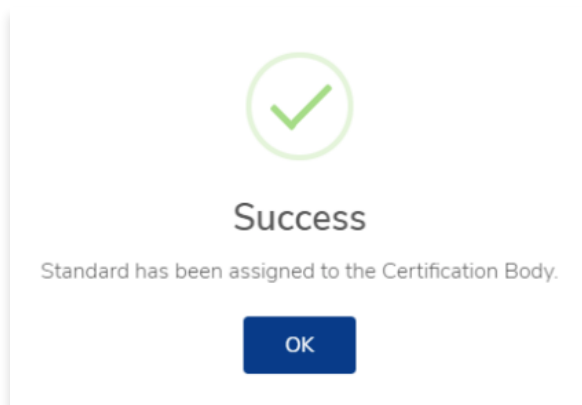


The screenshot shows a modal window titled "Assign Standard" with a close button (X) in the top right corner. The form contains the following fields, each highlighted with an orange oval:

- Select a Standard:** A dropdown menu with "ISO 45001" selected. Below it, the text "Standard Name" is visible.
- Select a Scheme:** A dropdown menu with "Occupational Health and Safety Certification Scheme" selected. Below it, the text "Scheme Name" is visible.
- First Issued Date:** A date input field containing "2019-04-13". Below it, the text "Original accreditation date of the current CB." is visible.
- Issued Date:** A date input field containing "2019-04-13". Below it, the text "Most recent accreditation date." is visible.
- Expiry Date:** A date input field containing "2022-04-13". Below it, the text "Accreditation expiry date." is visible.

At the bottom of the form, there is a large blue "Submit" button and a smaller grey "Close" button in the bottom right corner.

8. Click **Submit**.
9. A pop up will appear confirming that the Standard has been assigned to a Certification Body



10. You will see that the newly assigned standard has been added to the Certification Body's list of standards.

Certification Bodies / TEST Certification Body / Standards

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

Details **Standards** Technical Sectors Office Directories Country/Economy

Filter by Status Search Standard Name

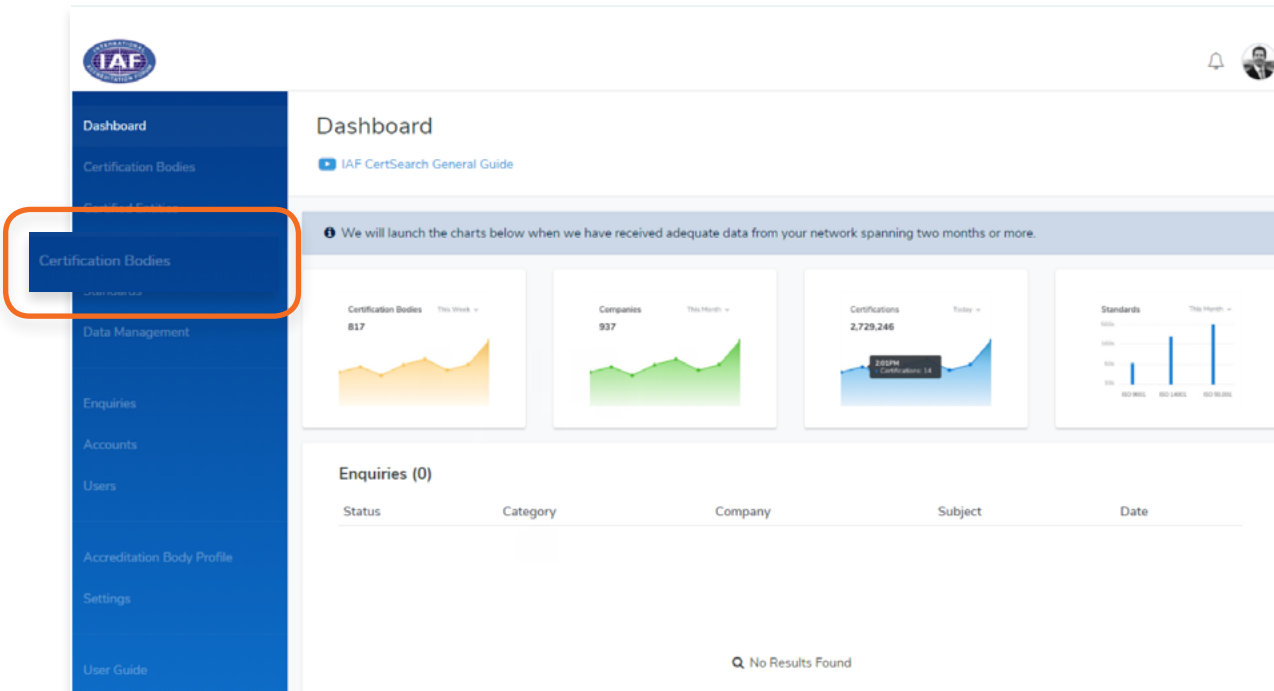
Status	Scope Type	Scheme	Standard	First Issued at	Issued at	Expiry at	Action
Active	Management System	Occupational Health and Safety Certification Sc...	ISO 45001	2019-04-13	2019-04-13	2022-04-13	<input type="button" value="View"/>
Active	Management System	Quality Management System	ISO 9001:2015	2019-04-13	2019-04-13	2022-04-13	<input type="button" value="View"/>
Active	Management System	15224 - Qualitätsmanagementsysteme / Dienstleis...	ISO 45001:2015	2019-09-12	2019-09-12	2019-09-12	<input type="button" value="View"/>

3.8. How to Assign a Technical Sector to a Certification Body

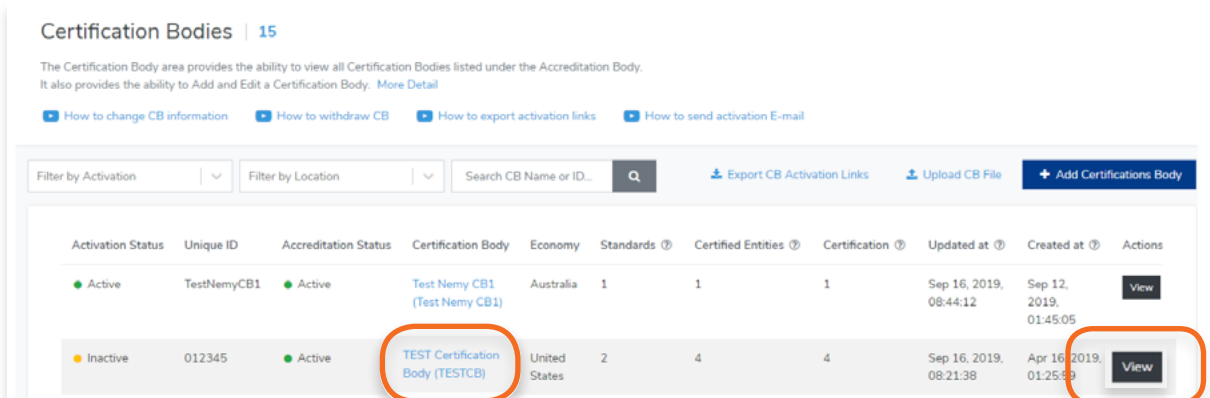
View the step by step guide below or watch the video guide here:

<https://youtu.be/xM1-b0H2ep0>

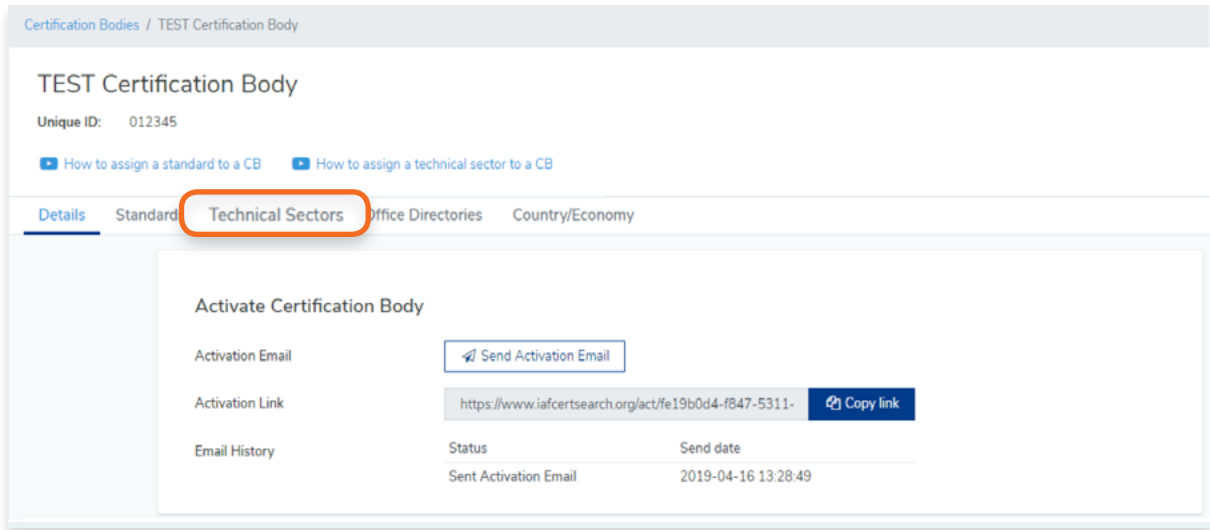
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



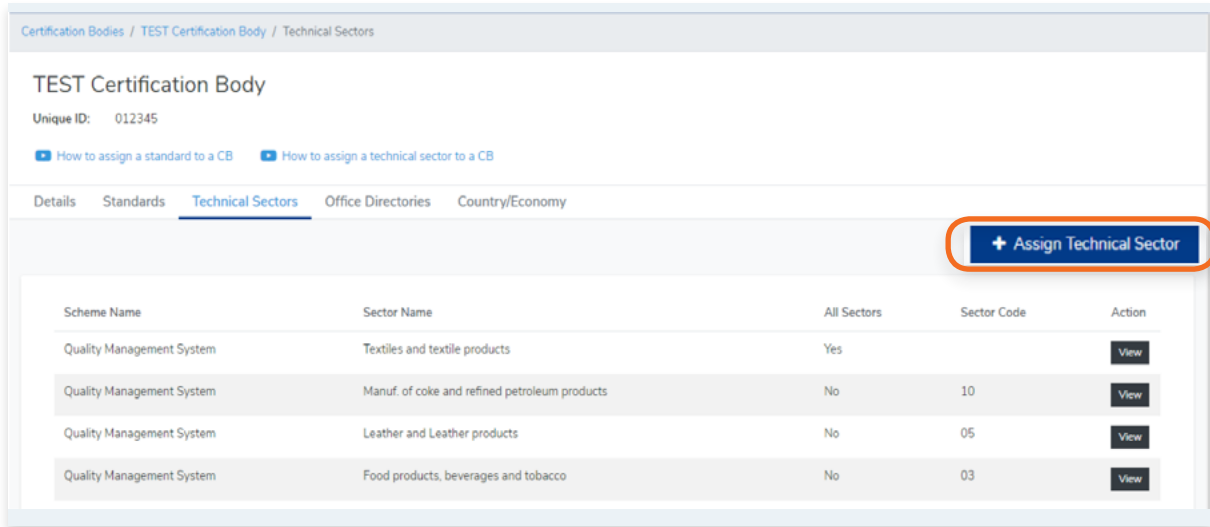
2. Find the Certification Body you wish to **edit**.
3. Click on the **Certification Body Name** or Click **View**.



4. Click **Technical Sectors** in the menu bar.



5. Here you will find a list of technical sectors assigned to a Certification Body. Click **+ Assign Technical Sector**



6. Select the Scheme Name

Note: If you can't find the Scheme Name from the list, you must create the standards tab.

Follow the video guide here:

https://youtu.be/0keAGAzX_rE

Or go to:

4.1 How to create a scheme in the Library

3.8. How to Assign a Technical Sector to a Certification Body

The screenshot shows the 'Add Technical Sector' form. The 'Select a Scheme' field is highlighted with an orange circle. The form contains the following fields: 'Select a Scheme' (with 'Quality Management System' selected), 'Select a Sector' (with 'Select or Search by Name' text), 'All Sectors' (with 'No' selected), and 'Sectors Code' (empty). At the bottom right, there are 'Close' and 'Save changes' buttons.

Select or Search a sector by name

Note: If you can't find the sector from the list, you must create the sector first.

Follow the video guide here:

<https://youtu.be/XxY0qKDrLaA>

Or go to:

4.10 How to add Technical Sectors

The screenshot shows the 'Add Technical Sector' form. The 'Select a Sector' field is highlighted with an orange circle. The form contains the following fields: 'Select a Scheme' (with 'Quality Management System' selected), 'Select a Sector' (with 'Select or Search by Name' text), 'All Sectors' (with 'No' selected), and 'Sectors Code' (empty). At the bottom right, there are 'Close' and 'Save changes' buttons.

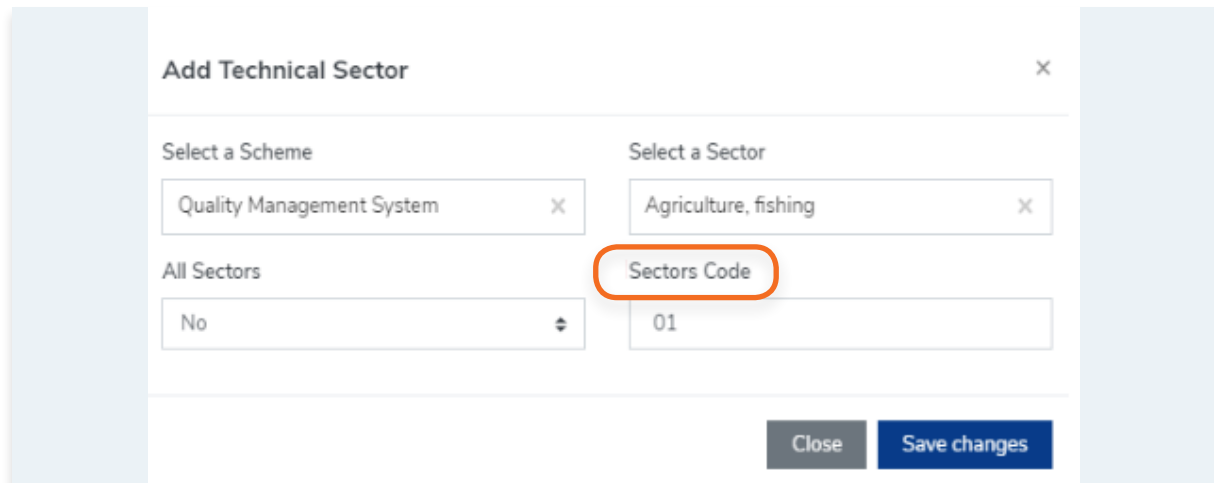
7. Indicate if it is for All Sectors

The screenshot shows the 'Add Technical Sector' form. The 'All Sectors' field is highlighted with an orange circle. The form contains the following fields: 'Select a Scheme' (with 'Quality Management System' selected), 'Select a Sector' (with 'Select or Search by Name' text), 'All Sectors' (with 'No' selected), and 'Sectors Code' (empty). At the bottom right, there are 'Close' and 'Save changes' buttons.

If Yes, proceed to clicking Save Changes. **If No**, enter the Sector Code and click Save changes.

Click **Close** to cancel.

8. The technical sector is now assigned to the Certification Body.



Add Technical Sector ×

Select a Scheme: Quality Management System ×

Select a Sector: Agriculture, fishing ×

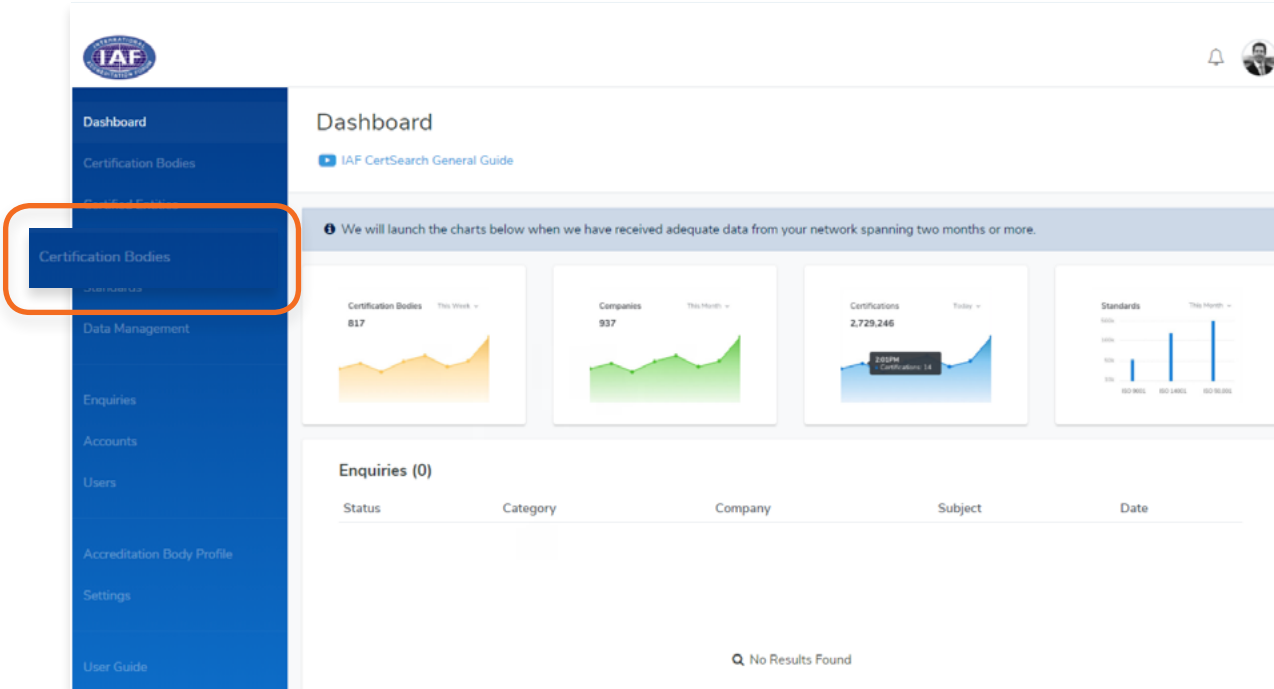
All Sectors: No ⇅

Sectors Code: 01

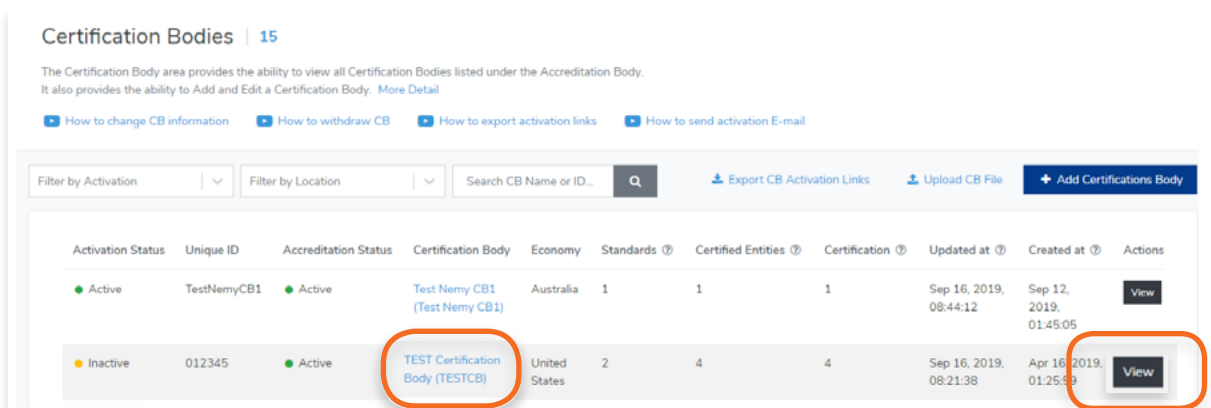
Close Save changes

3.9. How to Manage Country/Economy for a Certification Body

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.

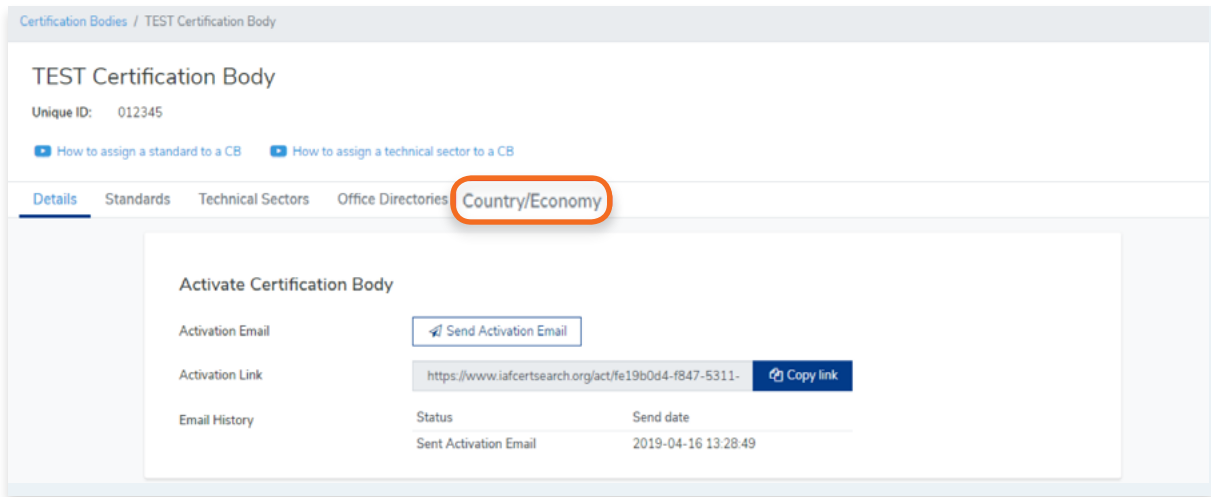


2. In the Certification Bodies page, Search for the Certification Body you want to manage the Country/Economy.
3. Click on the **Certification Body Name** or Click **View**.

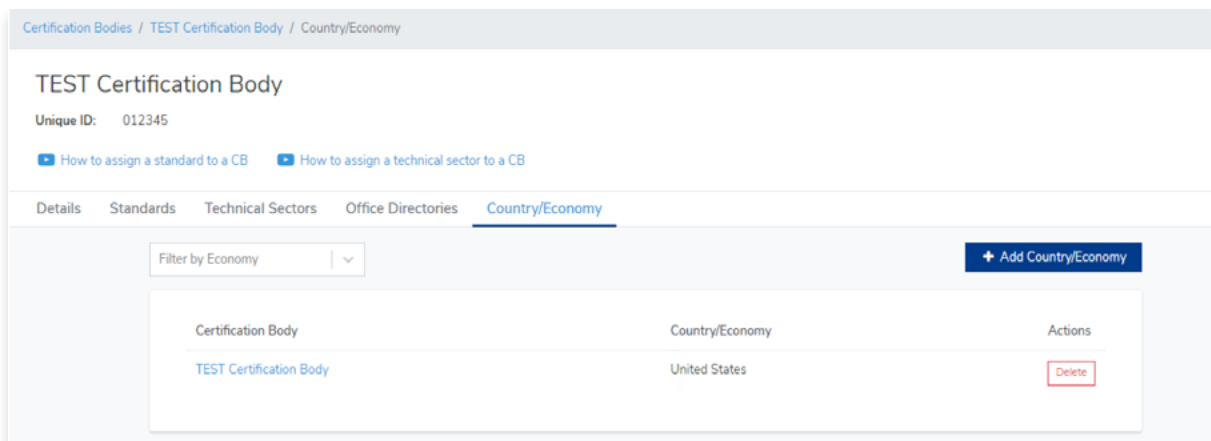


3.9. How to view Country/Economy to a Certification Body

4. Click **Country/Economy** in the menu bar



5. Here you will see the Country/Economy of the Certification Body



3.10. How to Edit Country/Economy to a Certification Body

You cannot edit the Country/Economy of a Certification Body. If you wish to make changes to a Country/Economy, you have to delete record and add it again.

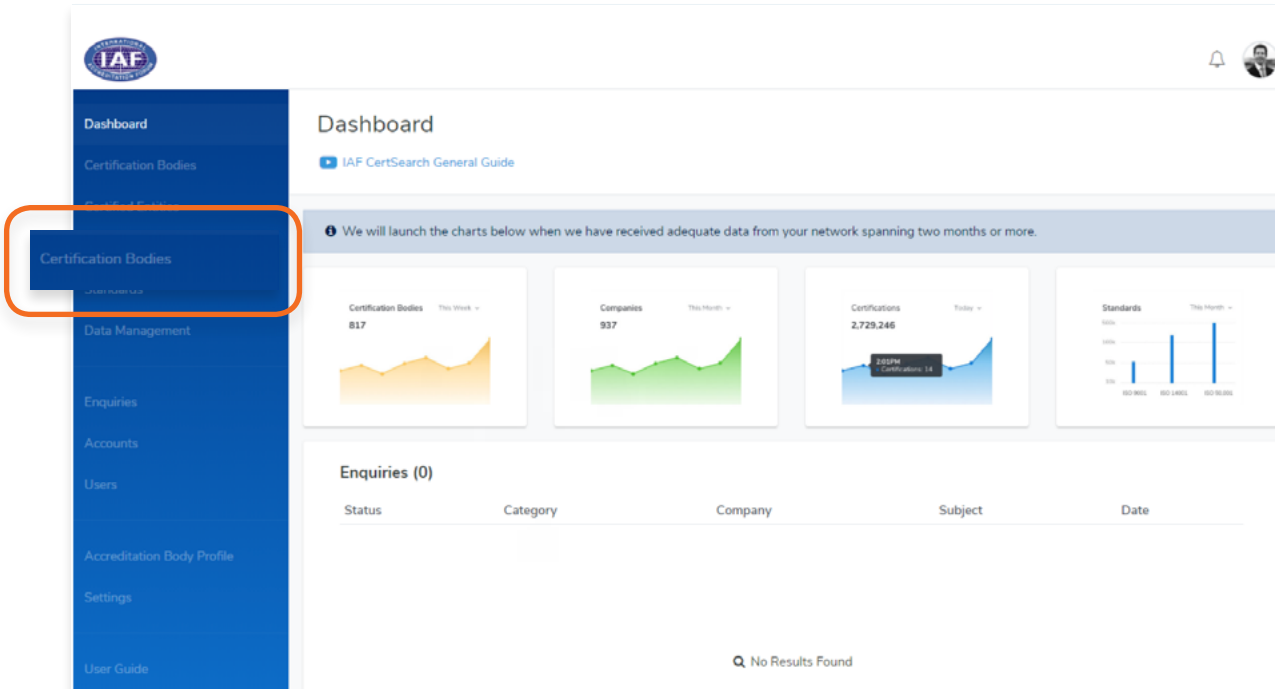
For more information, go to:

[3.11 How to delete Country/Economy to a Certification Body](#)

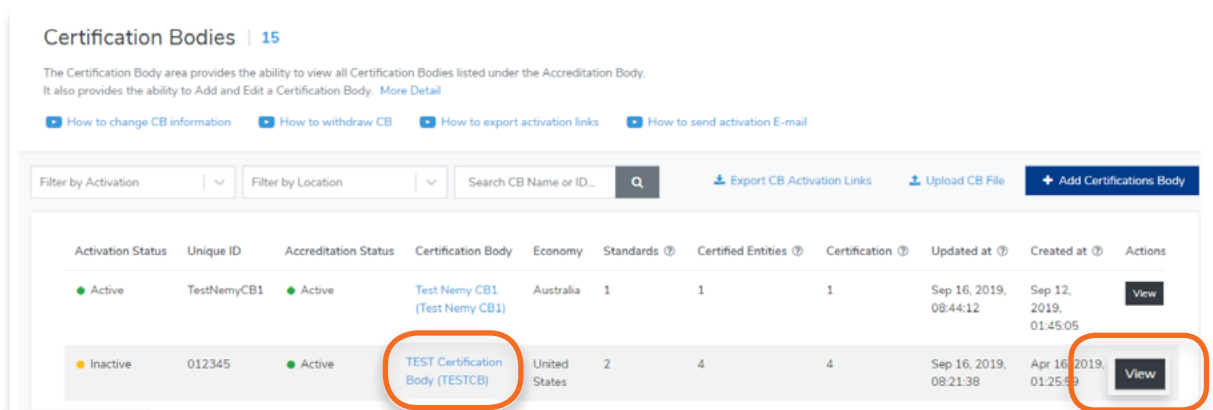
[3.12 How to add Country/Economy to a Certification Body](#)

3.11. How to Delete Country/Economy for a Certification Body

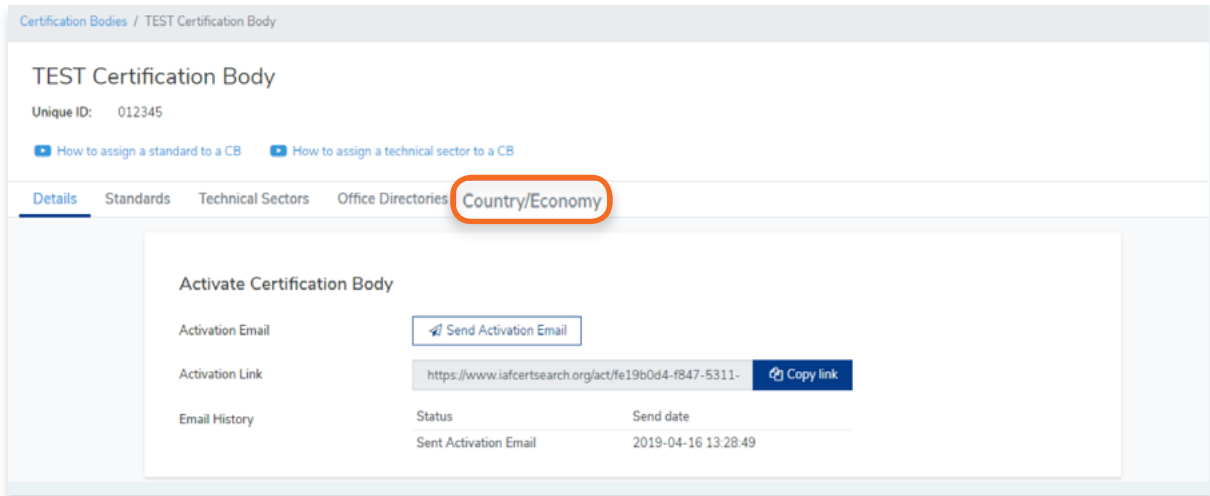
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



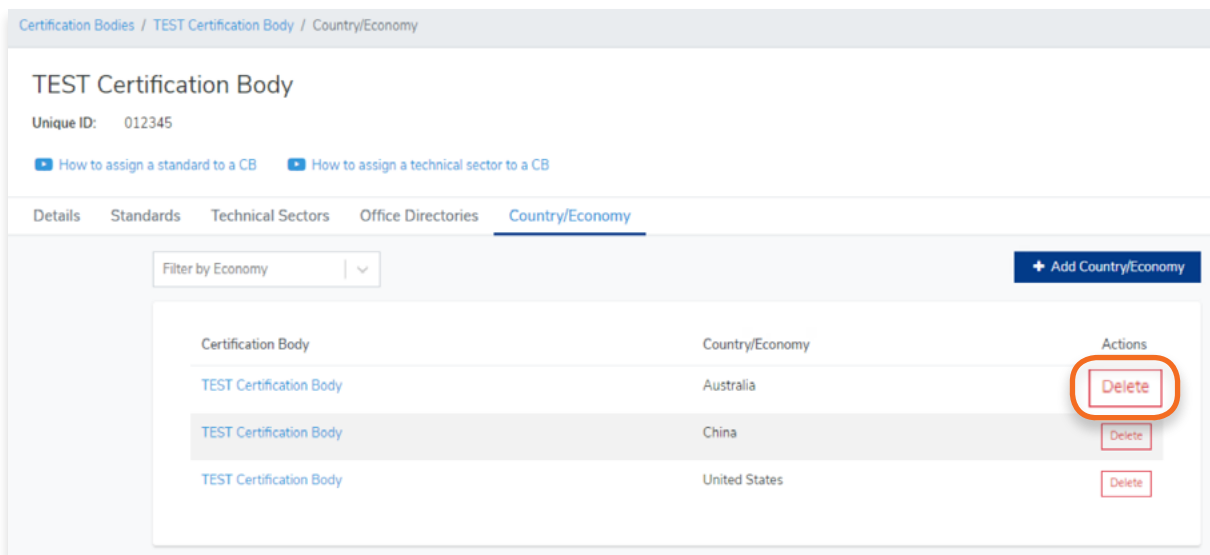
2. In the Certification Bodies page, Search for the Certification Body you want to view the Country/Economy.
3. Click on the **Certification Body Name** or Click **View**.



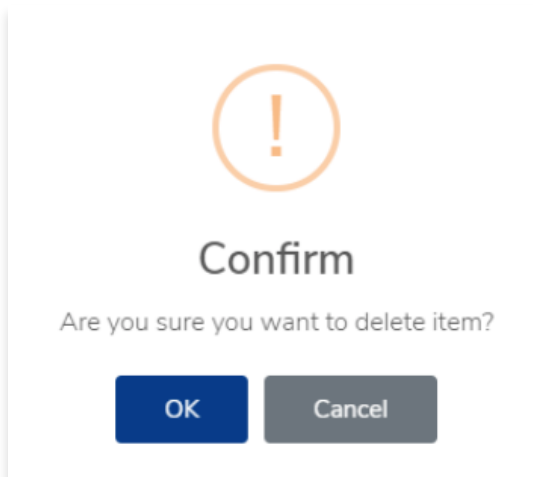
4. Click **Country/Economy** in the menu bar



5. Find the **Country/Economy** you wish to delete. Click Delete



6. A pop up will appear to confirm the deletion. Click OK or click Cancel to revert.



7. The Country/Economy record will now be deleted from the list.

Certification Bodies / TEST Certification Body / Country/Economy

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

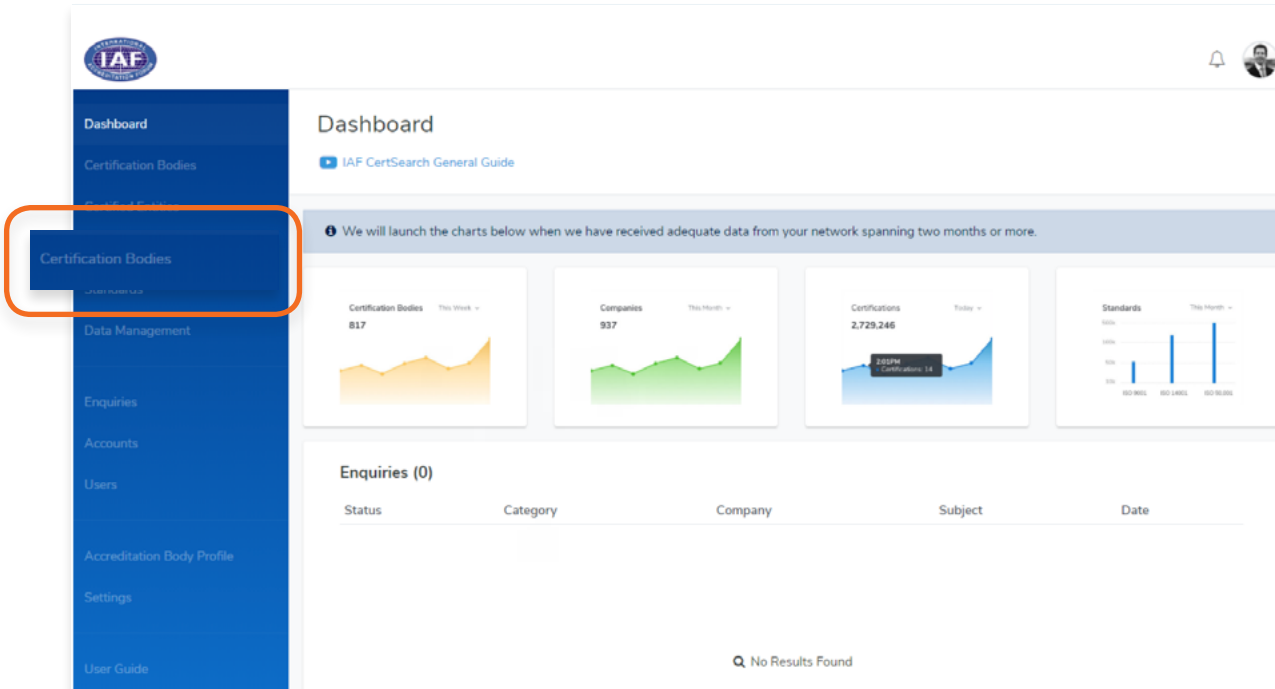
Details Standards Technical Sectors Office Directories Country/Economy

Filter by Economy + Add Country/Economy

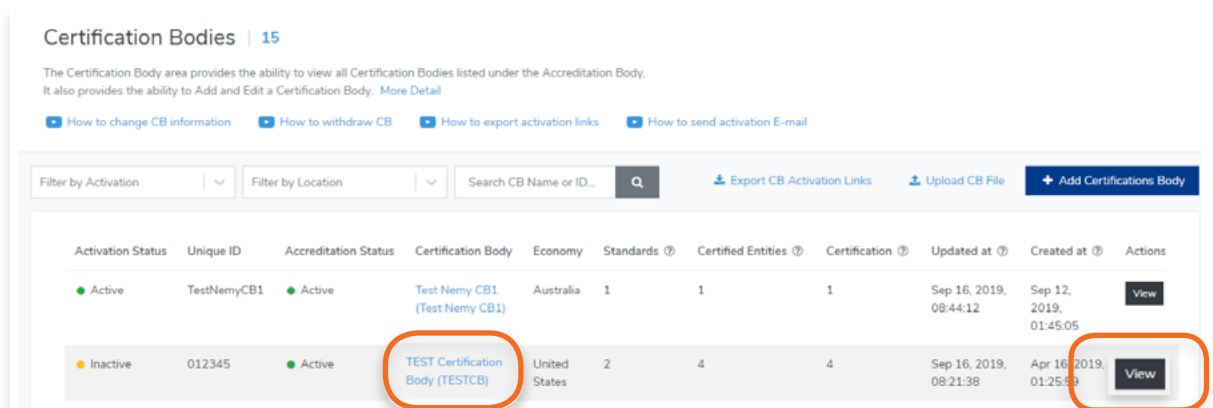
Certification Body	Country/Economy	Actions
TEST Certification Body	China	Delete
TEST Certification Body	United States	Delete

3.12. How to Add Country/Economy to a Certification Body

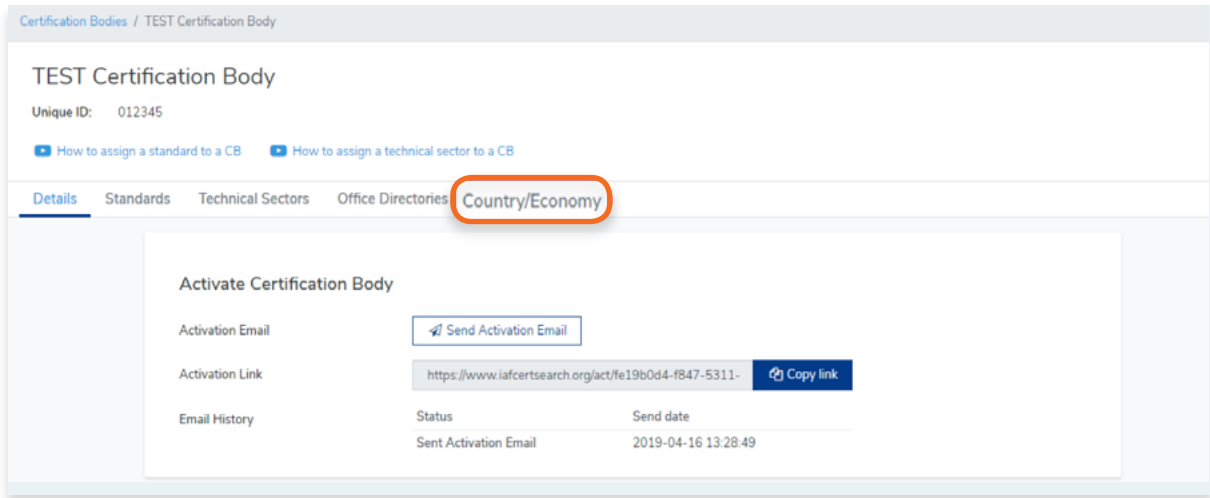
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



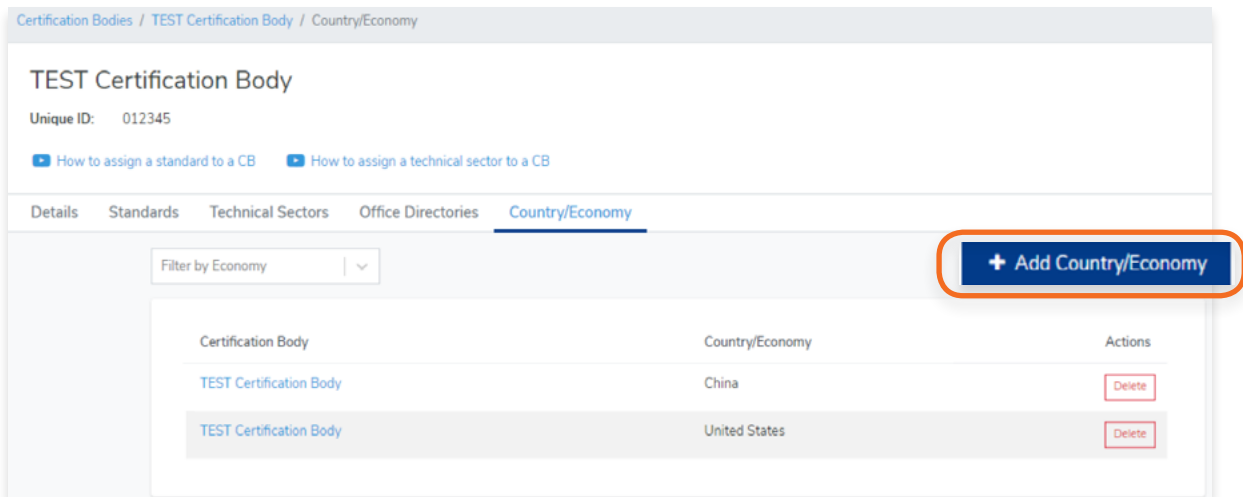
2. In the Certification Bodies page, Search for the Certification Body you want to view the Country/Economy.
3. Click on the **Certification Body Name** or Click **View**.



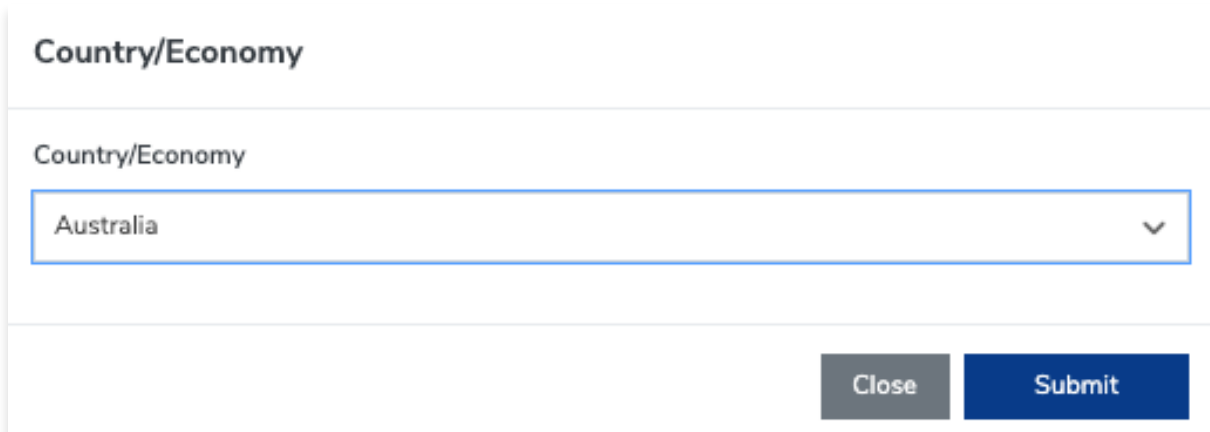
4. Click **Country/Economy** in the menu bar



5. Click + **Add Country/Economy**



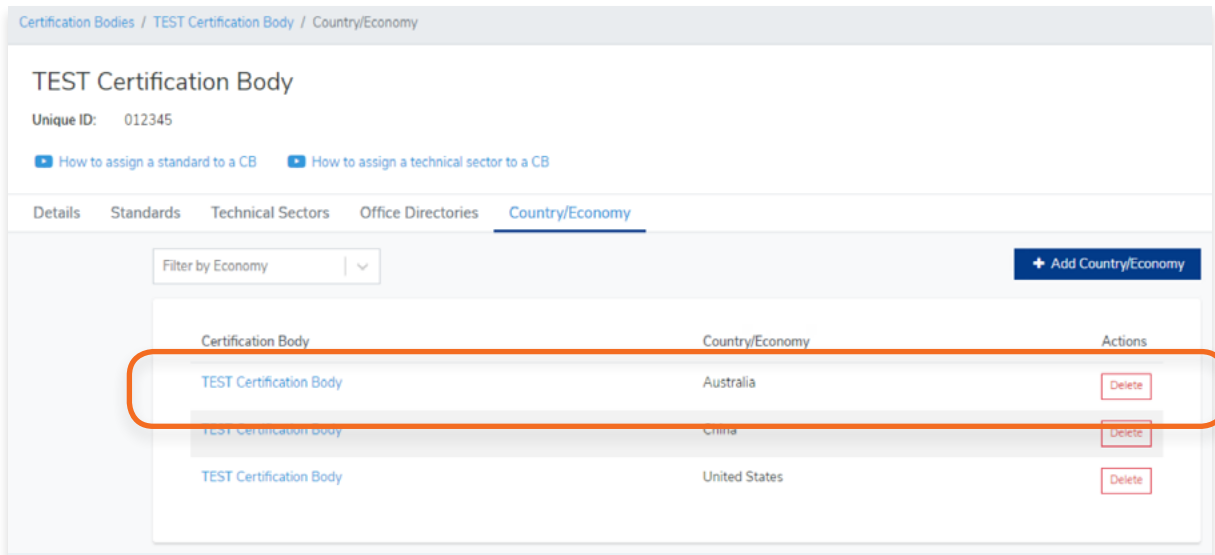
6. Select the **Country/Economy** from the drop down and click **Submit**



7. A pop up will appear to confirm that you have successfully added a Country/Economy



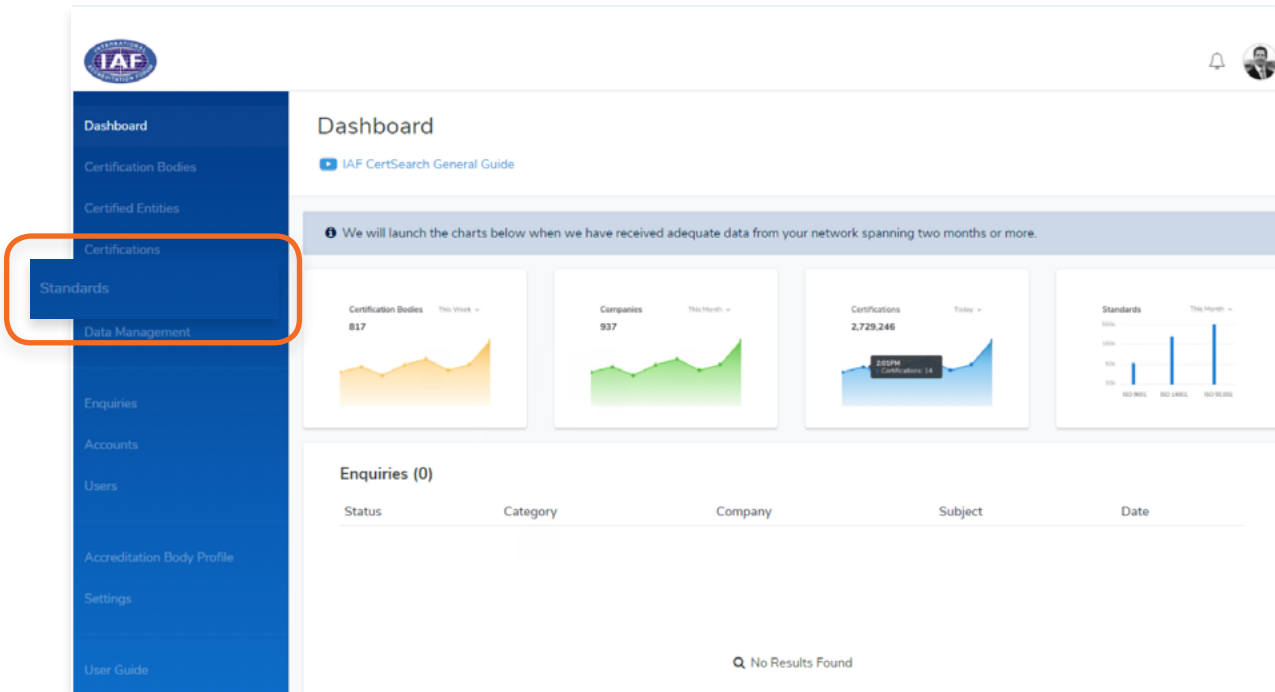
8. The Country/Economy is now added to your Certification Body's list.



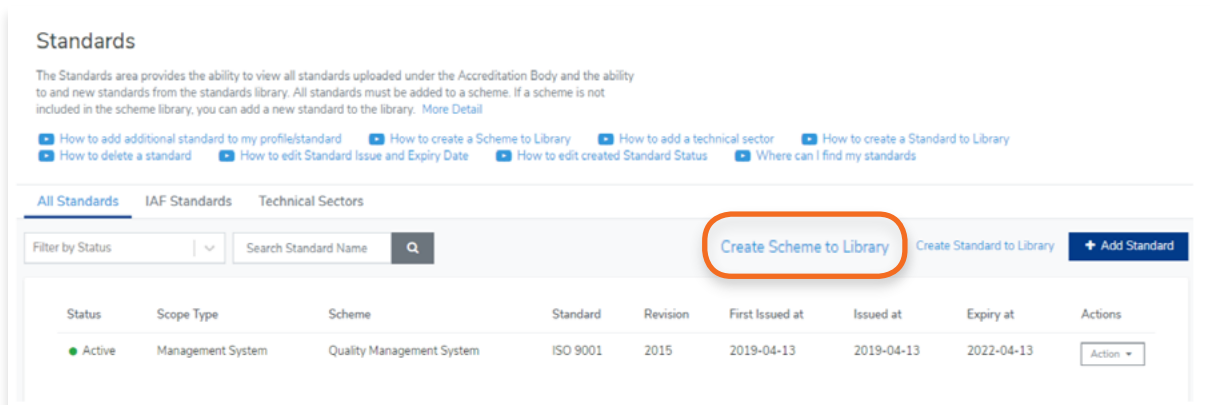
4. Standards

4.1. How to Create a Scheme in the Library

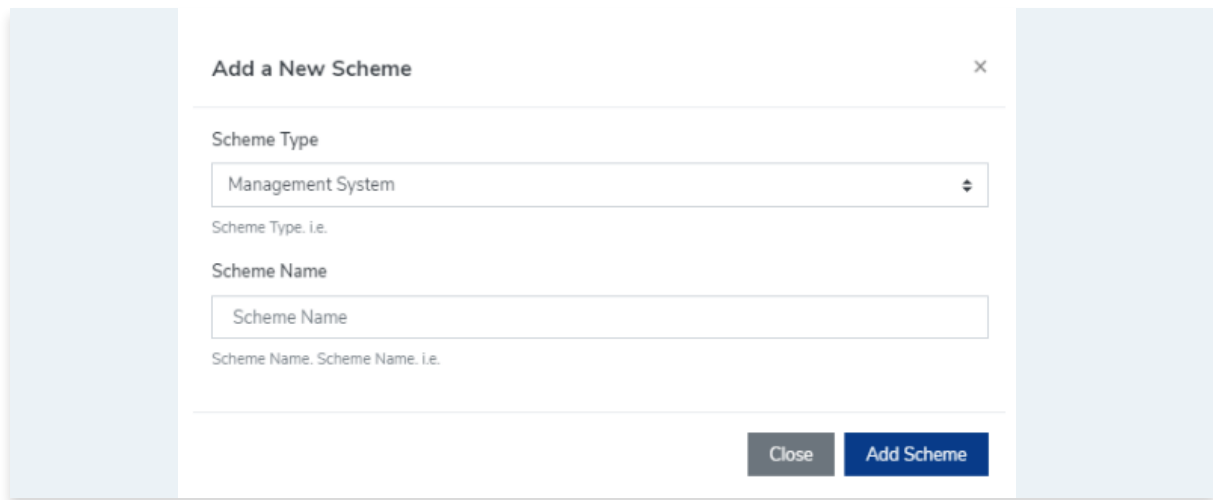
1. From the Dashboard, click **Standards** in the left hand navigation.



2. Click **Create Scheme to Library**.



3. A pop up will appear where you can select the Scheme Type and enter the Scheme Name



Add a New Scheme ×

Scheme Type

Management System ▾

Scheme Type. i.e.

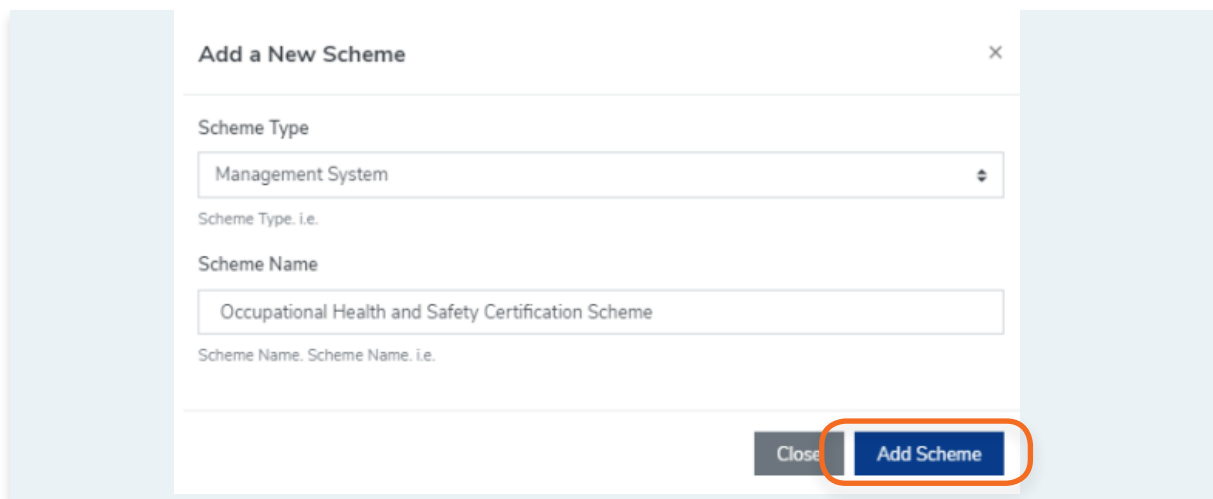
Scheme Name

Scheme Name

Scheme Name. Scheme Name. i.e.

Close Add Scheme

4. Click **Add Scheme** or click **Close** to cancel.



Add a New Scheme ×

Scheme Type

Management System ▾

Scheme Type. i.e.

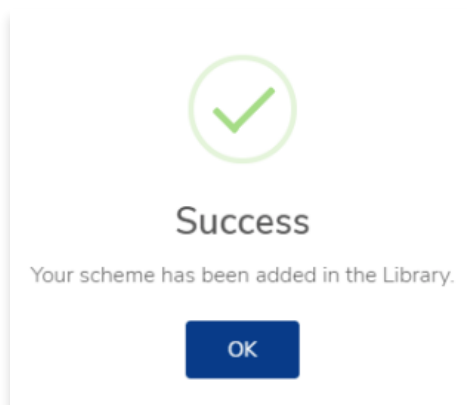
Scheme Name

Occupational Health and Safety Certification Scheme

Scheme Name. Scheme Name. i.e.

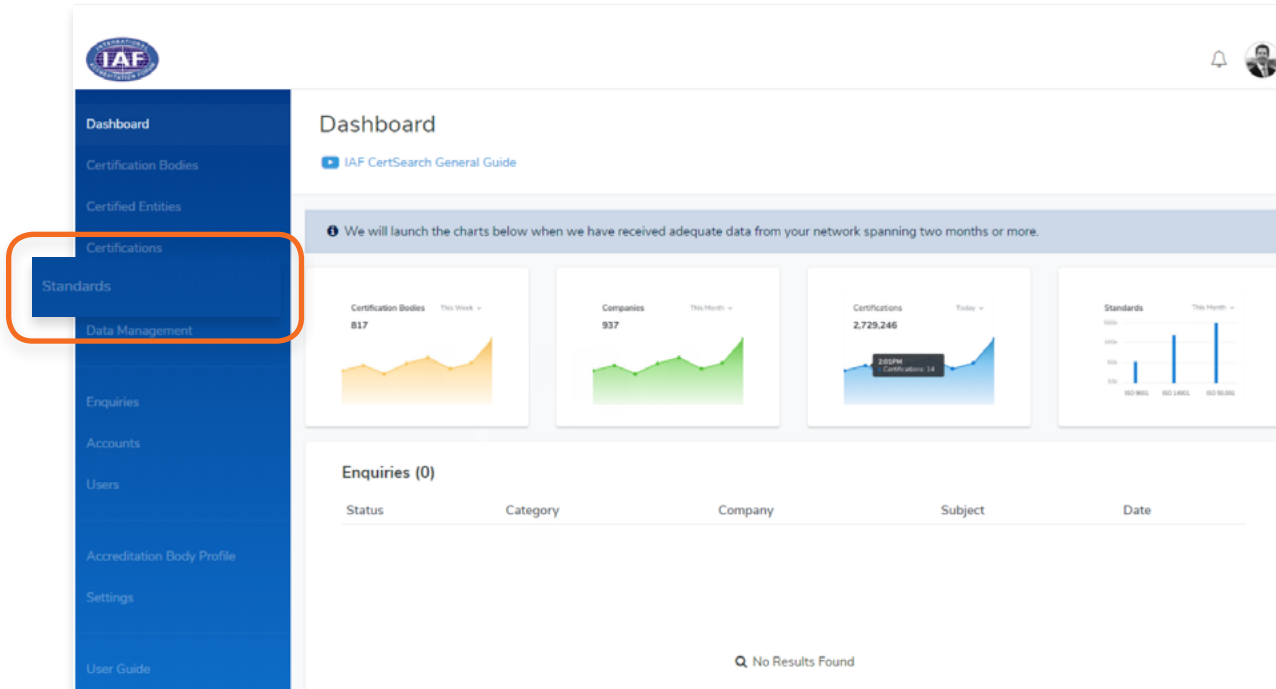
Close Add Scheme

5. A pop up will appear indicating that you have added a scheme successfully.



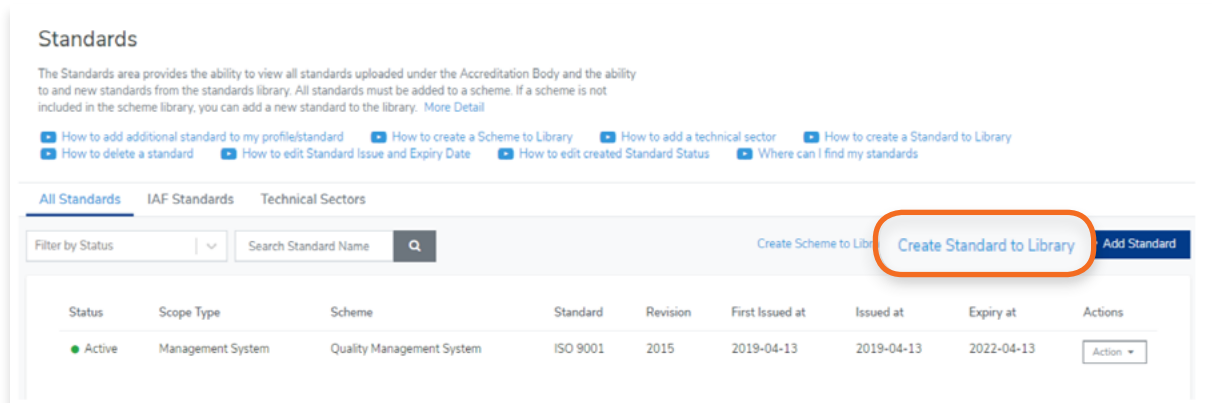
4.2. How to Create a standard in the Library

1. From the Dashboard, click **Standards** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left, a blue navigation sidebar contains several menu items. The 'Standards' item is highlighted with an orange rectangular box. The main dashboard area displays a 'Dashboard' header with a link to 'IAF CertSearch General Guide'. Below this, there is a notification bar and four data visualization charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. At the bottom, there is an 'Enquiries (0)' section with a table header and a 'No Results Found' message.

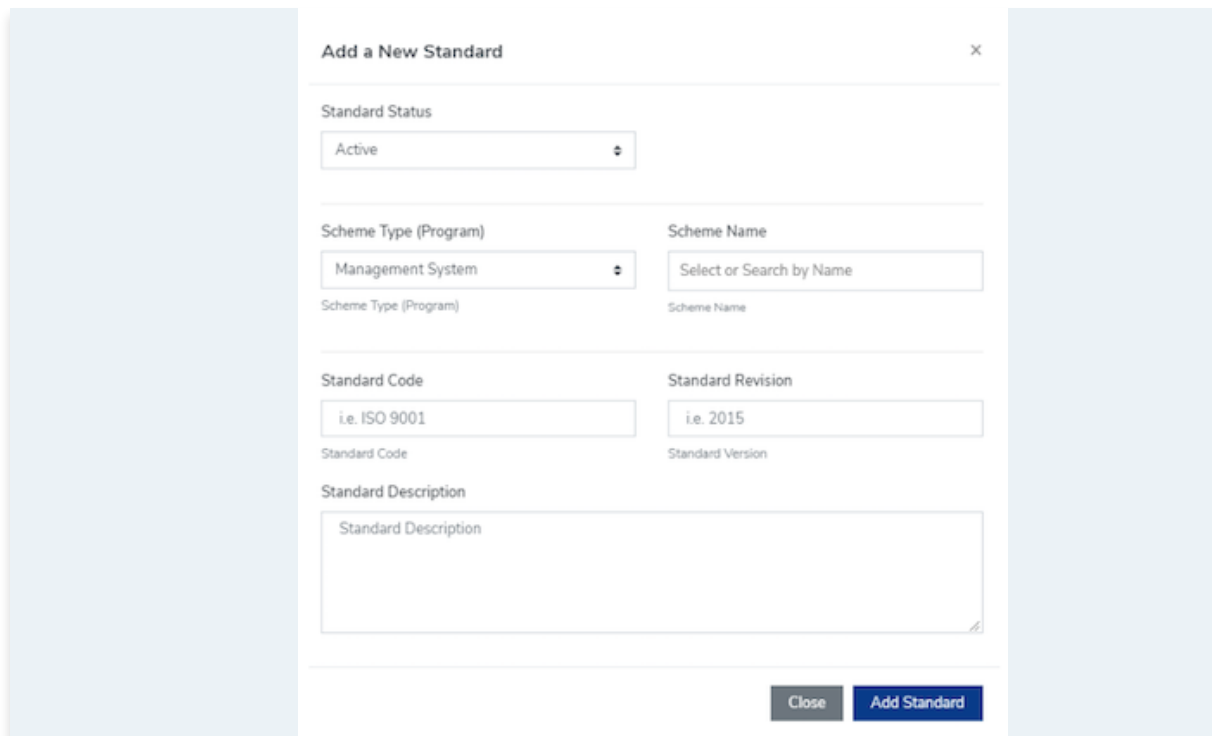
2. Click **Create Standard to Library**.



The screenshot shows the 'Standards' page. It includes a title 'Standards', a descriptive paragraph, and a row of six help links. Below this, there are tabs for 'All Standards', 'IAF Standards', and 'Technical Sectors'. A search bar is present with the text 'Search Standard Name'. To the right of the search bar, there are three buttons: 'Create Scheme to Lib...', 'Create Standard to Library' (highlighted with an orange box), and 'Add Standard'. Below the buttons is a table with the following data:

Status	Scope Type	Scheme	Standard	Revision	First Issued at	Issued at	Expiry at	Actions
Active	Management System	Quality Management System	ISO 9001	2015	2019-04-13	2019-04-13	2022-04-13	Action

3. A pop up will appear where you can select the **Standard Status**, **Scheme Type**, **Scheme Name**, **Standard Code**, **Standard Revision**, and **Standard Description**.

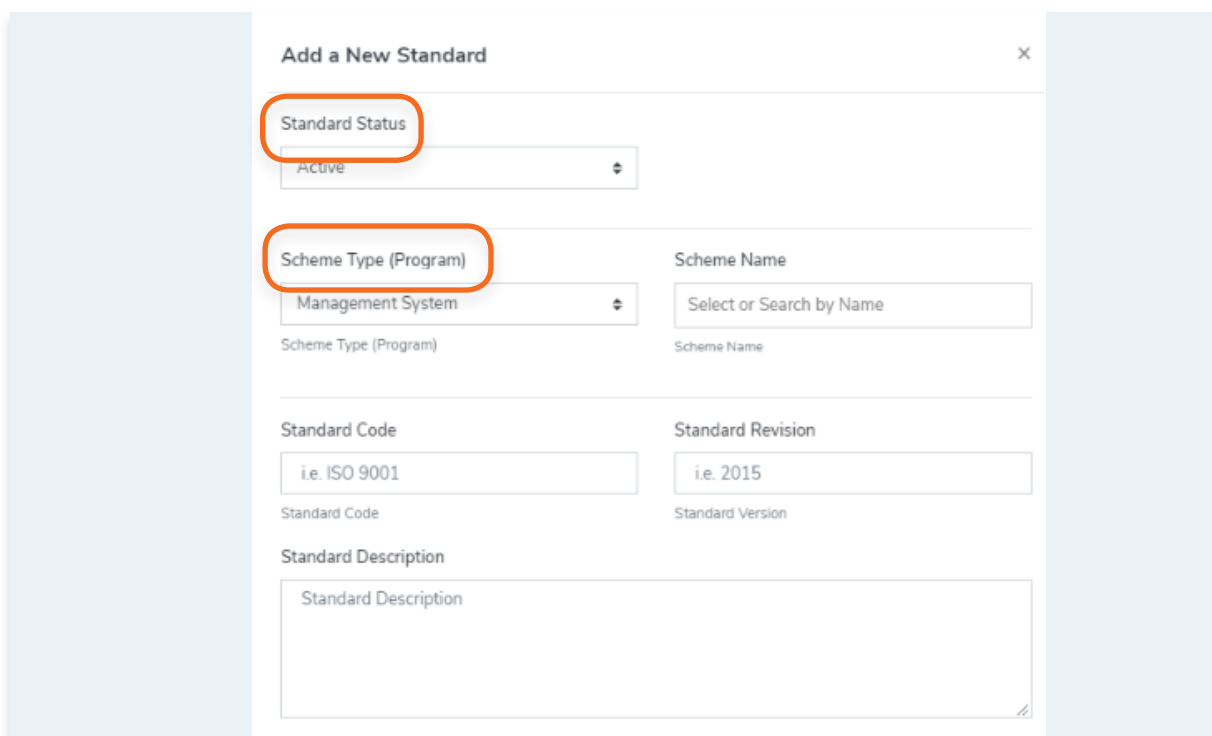


The screenshot shows a modal window titled "Add a New Standard" with a close button (X) in the top right corner. The form contains the following fields:

- Standard Status:** A dropdown menu with "Active" selected.
- Scheme Type (Program):** A dropdown menu with "Management System" selected.
- Scheme Name:** A text input field with the placeholder "Select or Search by Name".
- Standard Code:** A text input field with "i.e. ISO 9001" entered.
- Standard Revision:** A text input field with "i.e. 2015" entered.
- Standard Description:** A large text area with the placeholder "Standard Description".

At the bottom right of the form, there are two buttons: "Close" and "Add Standard".

4. Select the **Standard Status** and the **Scheme Type (Program)**



This screenshot is identical to the one above, but with two orange circles highlighting the "Standard Status" dropdown and the "Scheme Type (Program)" dropdown, indicating the selection step mentioned in the text.

5. Select or Search by the Scheme Name of the Standard.

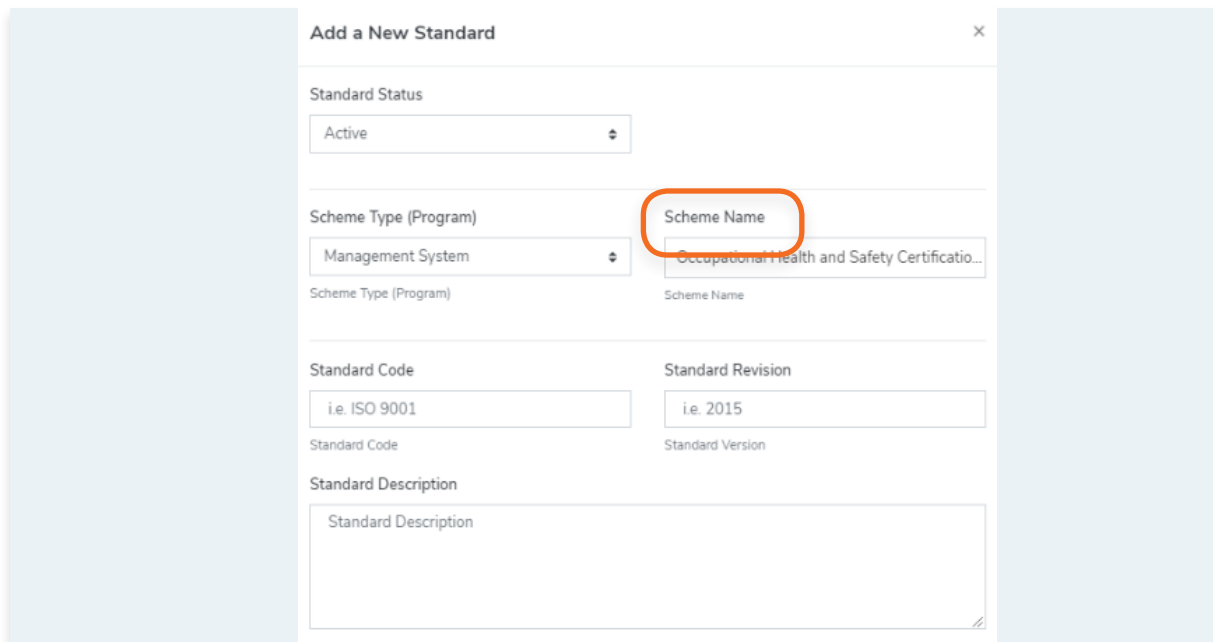
Note: If you can't find the Scheme Name from the list, you must create the scheme in the library.

Follow the video guide here:

https://youtu.be/0keAGazX_rE

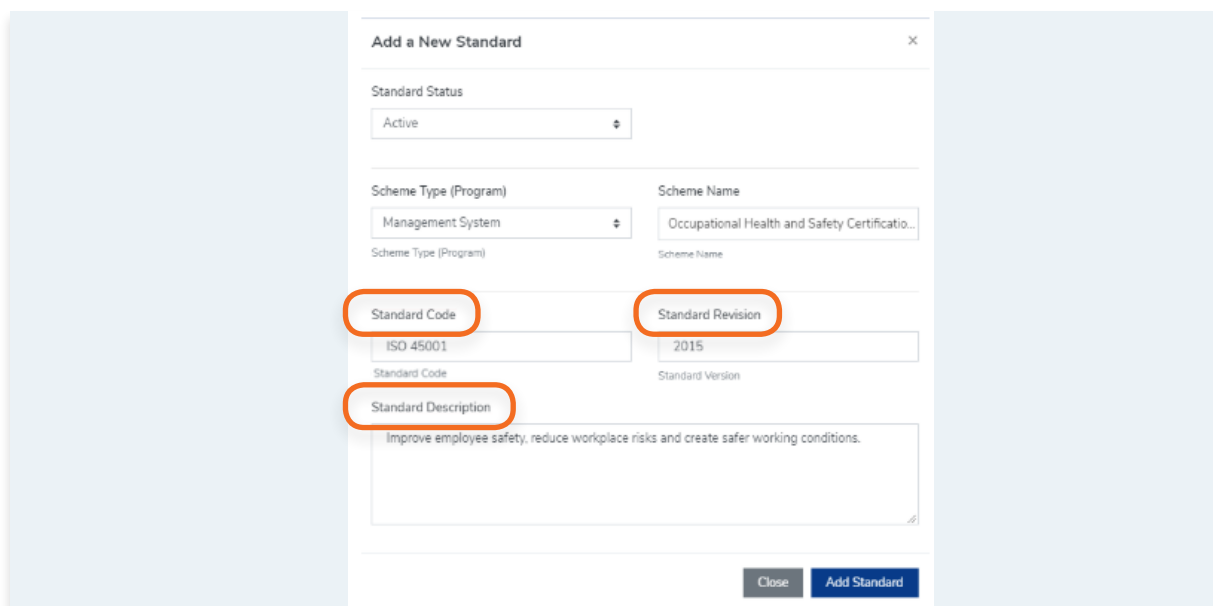
Or go to:

[4.1 How to create a scheme in the Library](#)



The screenshot shows a modal window titled "Add a New Standard" with a close button (X) in the top right corner. The form contains several fields: "Standard Status" (Active), "Scheme Type (Program)" (Management System), "Scheme Name" (Occupational Health and Safety Certificatio...), "Standard Code" (i.e. ISO 9001), "Standard Revision" (i.e. 2015), and "Standard Description" (Standard Description). The "Scheme Name" field is highlighted with an orange circle.

6. Enter the **Standard Code**, **Standard Revision**, and **Standard Description**



The screenshot shows the same "Add a New Standard" modal window. The "Standard Code" field (ISO 45001), "Standard Revision" field (2015), and "Standard Description" field (Improve employee safety, reduce workplace risks and create safer working conditions.) are highlighted with orange circles. The "Add Standard" button is visible at the bottom right.

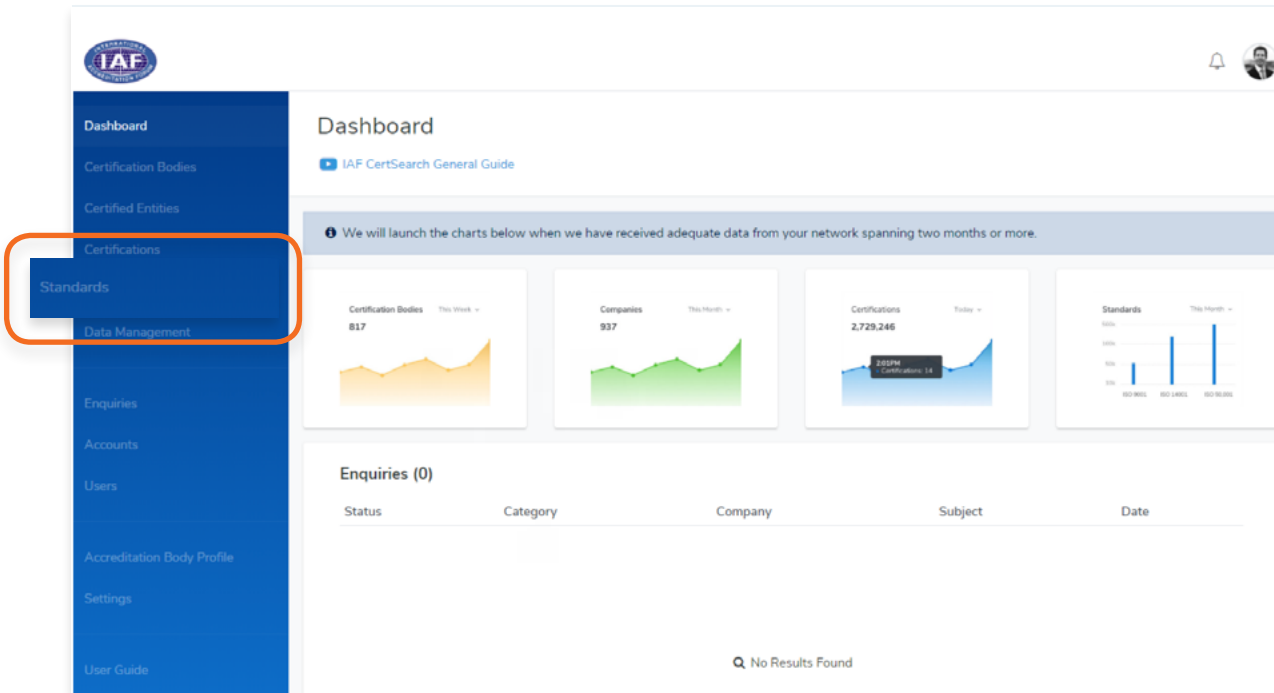
7. Click **Add Standard** or click **Close** to cancel.

4.3. How to View Standards

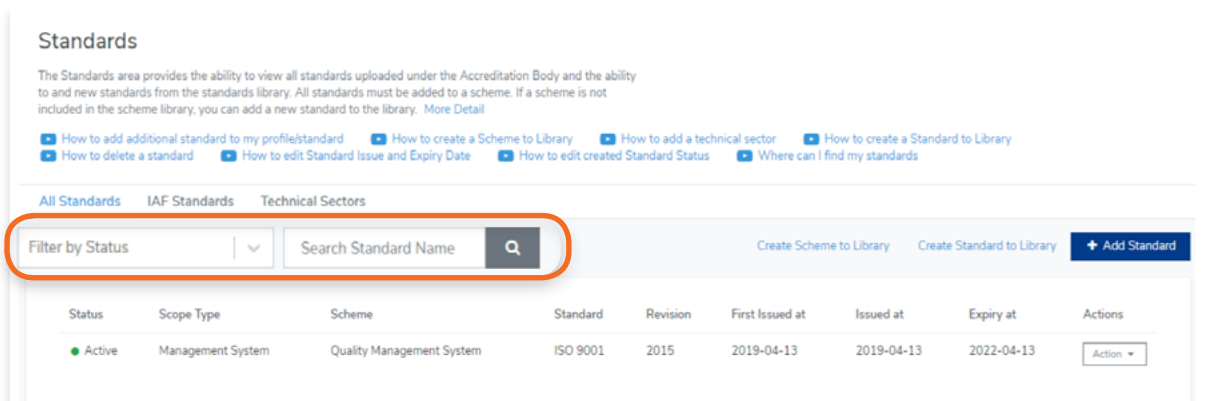
View the step by step guide below or watch the video guide here:

<https://youtu.be/mKvN9P22fE8>

1. From the Dashboard, click **Standards** in the left hand navigation.



2. Here you can see a list of Standards uploaded.
You can filter the standards by status or search by standard name.



4.4. How to Edit Standards

View the step by step guide below or watch the video guide here:

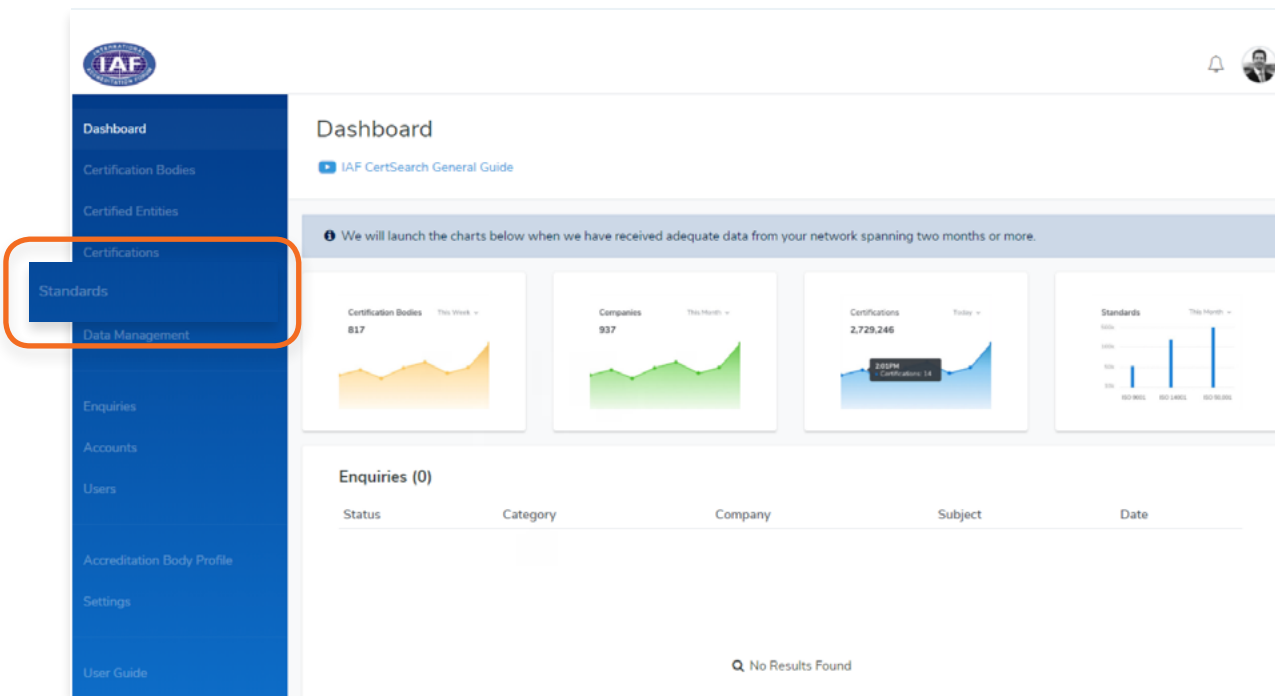
How to edit Standard Status:

<https://youtu.be/WpRxntVkkAA>

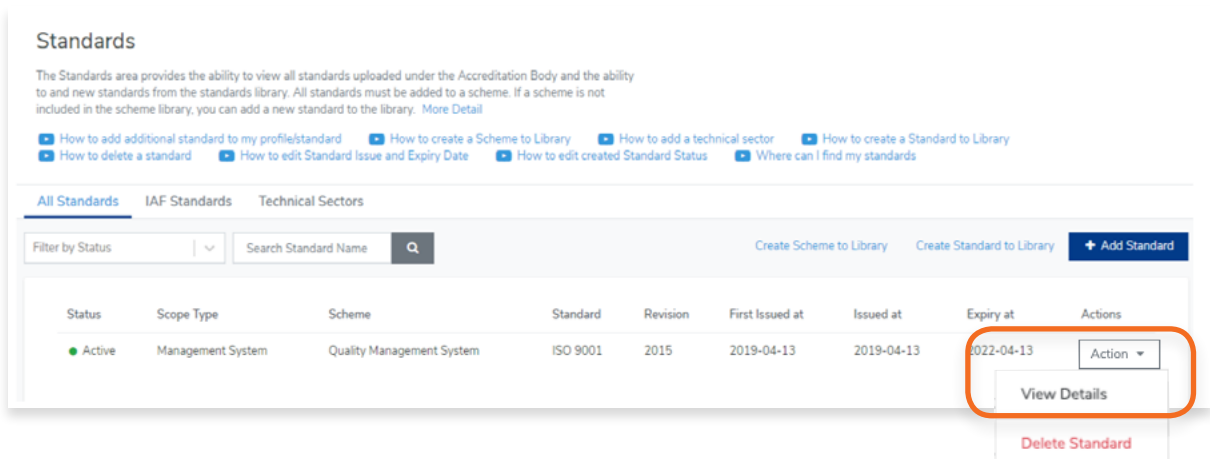
How to edit Standard Issue and Expiry Date:

<https://youtu.be/mhn436F7r7k>

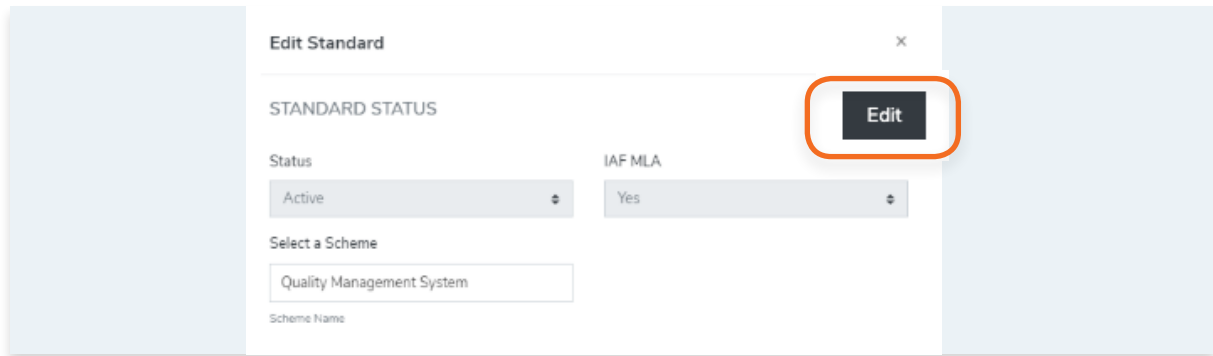
1. From the Dashboard, click **Standards** in the left hand navigation.



2. Find the standard you wish to edit. Click **Action** and Select **View Details**



3. Click **Edit** in the Standard Status section to change the Status, IAF MLA and Scheme information

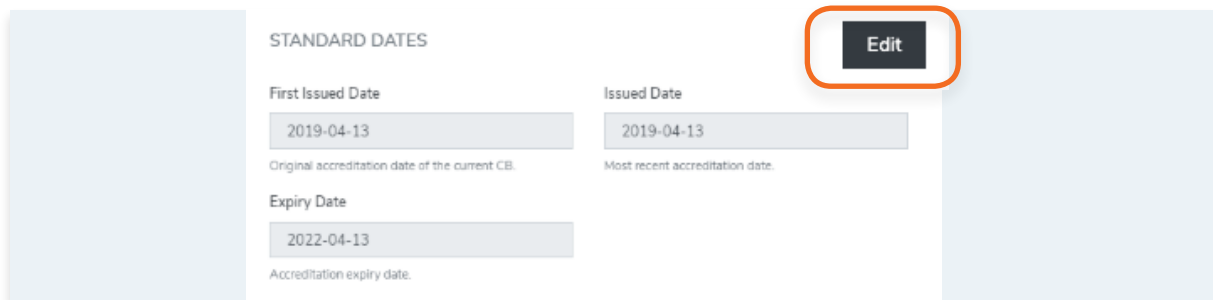


The screenshot shows a modal window titled "Edit Standard" with a close button (X) in the top right corner. The "STANDARD STATUS" section contains the following fields:

- Status:** A dropdown menu currently set to "Active".
- IAF MLA:** A dropdown menu currently set to "Yes".
- Select a Scheme:** A text input field containing "Quality Management System".
- Scheme Name:** A label below the scheme selection field.

An orange circle highlights the "Edit" button in the top right corner of the form area.

4. Or click **Edit** in the Standard Dates section to change the standard issue, expiry and first issue dates.



The screenshot shows the "STANDARD DATES" section of the "Edit Standard" dialog box. It contains the following date fields:

- First Issued Date:** A date input field showing "2019-04-13". Below it is the text "Original accreditation date of the current CB".
- Issued Date:** A date input field showing "2019-04-13". Below it is the text "Most recent accreditation date".
- Expiry Date:** A date input field showing "2022-04-13". Below it is the text "Accreditation expiry date".

An orange circle highlights the "Edit" button in the top right corner of the form area.

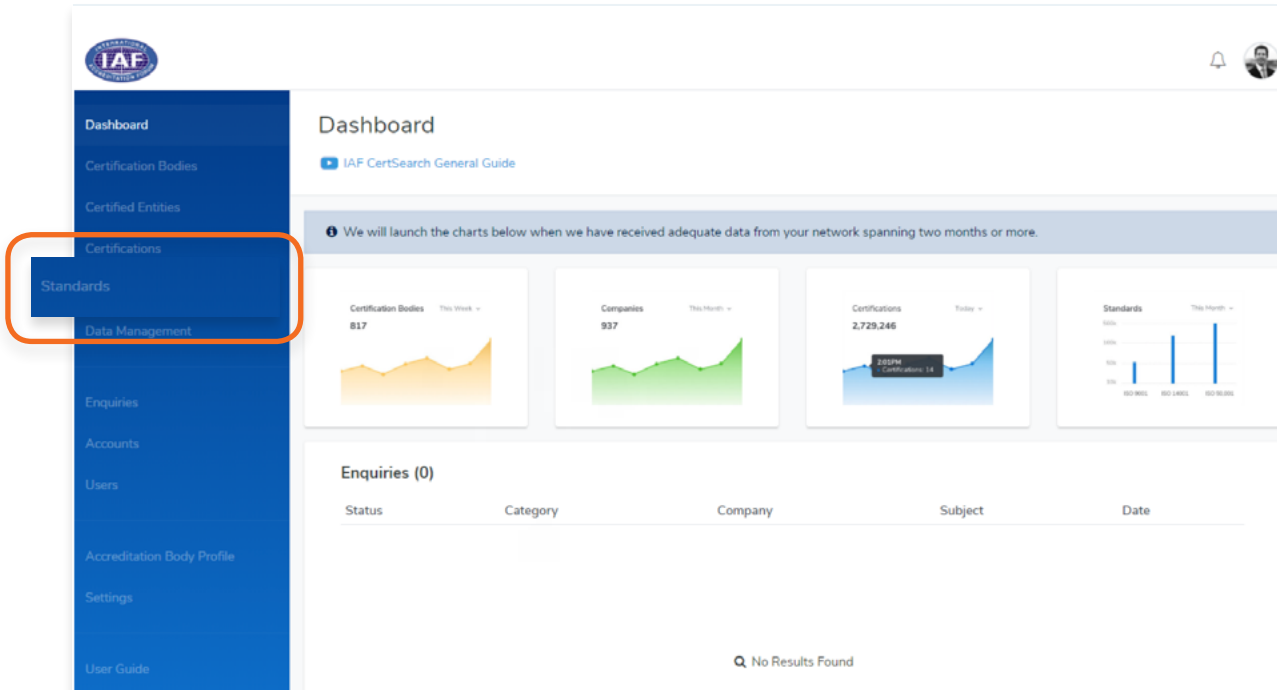
5. Click **Save changes** or click **Cancel** to revert.

4.4.1. How to Edit Standard Status

View the step by step guide below or watch the video guide here:

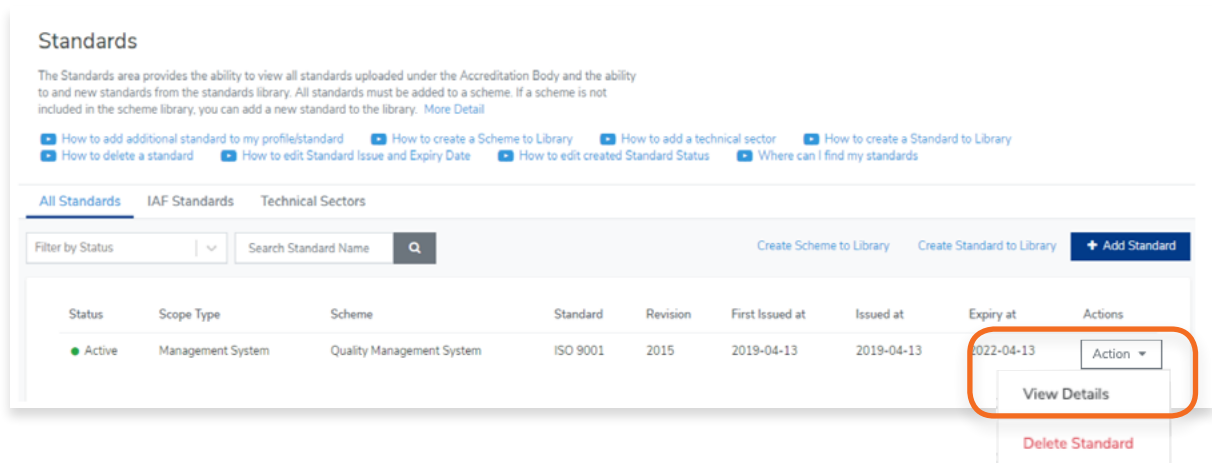
<https://youtu.be/WpRxntVkkAA>

1. From the Dashboard, click **Standards** in the left hand navigation.



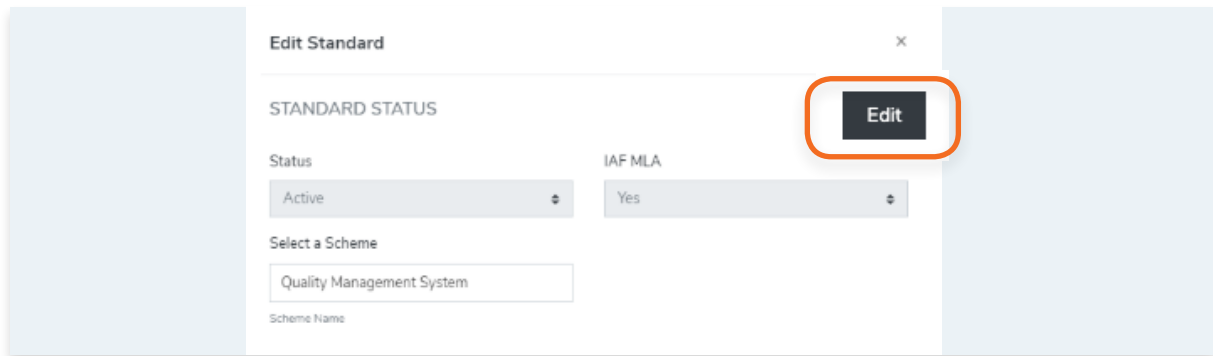
The screenshot shows the IAF dashboard interface. On the left, a blue navigation sidebar contains several menu items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards (highlighted with an orange box), Data Management, Enquiries, Accounts, Users, Accreditation Body Profile, Settings, and User Guide. The main content area is titled 'Dashboard' and features a video link for 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards' (This Month). Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date. At the bottom, it says 'No Results Found'.

2. Find the standard you wish to edit. Click **Action** and Select **View Details**



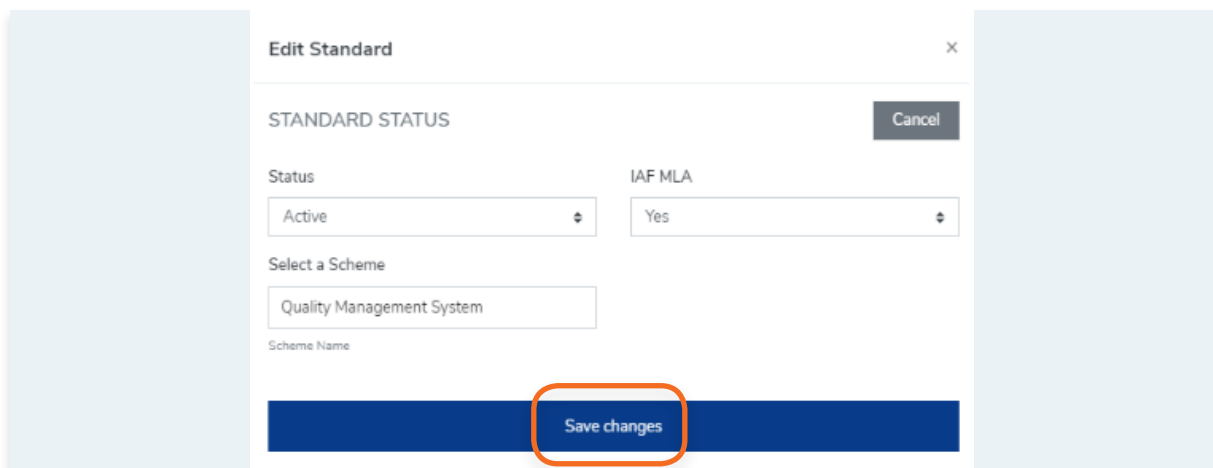
The screenshot shows the 'Standards' page. It includes a description: 'The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. More Detail'. Below this are several links: 'How to add additional standard to my profile/standard', 'How to create a Scheme to Library', 'How to add a technical sector', 'How to create a Standard to Library', 'How to delete a standard', 'How to edit Standard Issue and Expiry Date', 'How to edit created Standard Status', and 'Where can I find my standards'. The page has tabs for 'All Standards', 'IAF Standards', and 'Technical Sectors'. There is a search bar for 'Search Standard Name' and buttons for 'Filter by Status', 'Create Scheme to Library', 'Create Standard to Library', and '+ Add Standard'. A table lists standards with columns: Status, Scope Type, Scheme, Standard, Revision, First Issued at, Issued at, Expiry at, and Actions. The first row shows: Active, Management System, Quality Management System, ISO 9001, 2015, 2019-04-13, 2019-04-13, 2022-04-13. The 'Actions' column for this row has a dropdown menu with 'View Details' (highlighted with an orange box) and 'Delete Standard'.

3. Click **Edit** in the Standard Status section to change the Status, IAF MLA and Scheme information



The screenshot shows a modal dialog titled "Edit Standard" with a close button (X) in the top right corner. Below the title is the section "STANDARD STATUS". It contains two dropdown menus: "Status" with "Active" selected and "IAF MLA" with "Yes" selected. Below these is a text input field labeled "Select a Scheme" containing "Quality Management System" and a label "Scheme Name" below it. A dark grey button labeled "Edit" is located in the top right corner of the dialog, highlighted with an orange circle.

4. Click **Save changes** or click **Cancel** to revert.



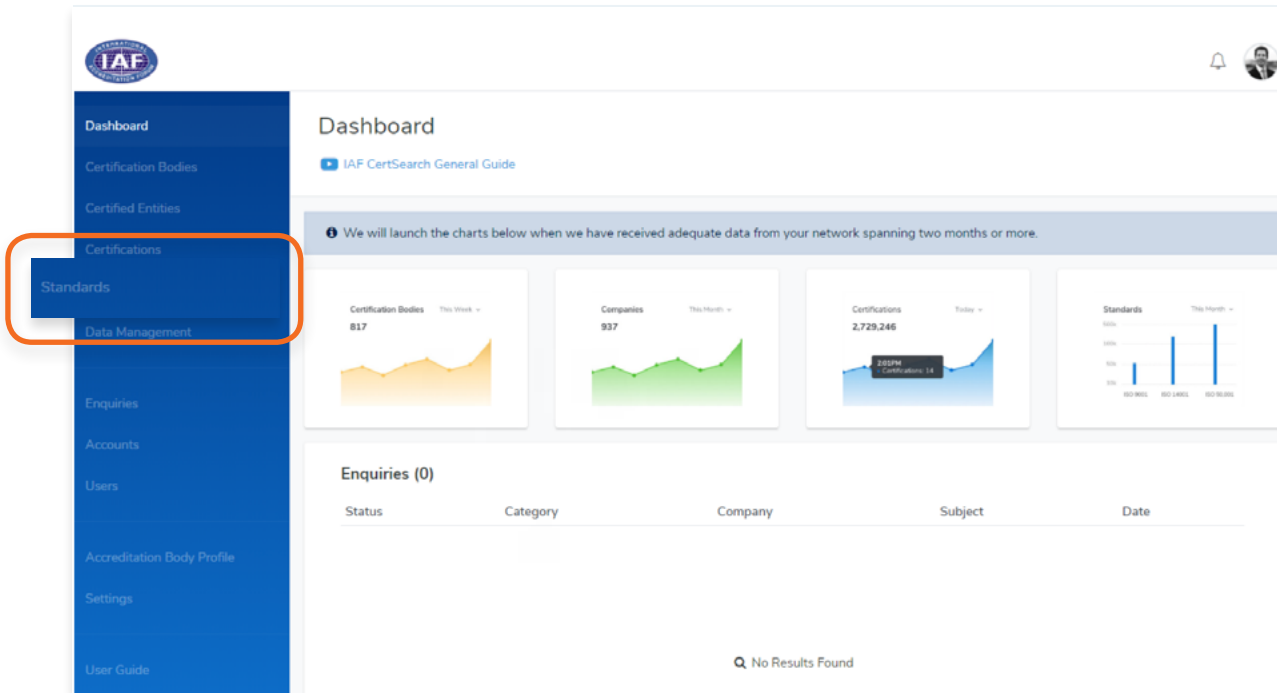
The screenshot shows the same "Edit Standard" dialog box. The "Status" dropdown is now "Active" and the "IAF MLA" dropdown is "Yes". A dark grey button labeled "Cancel" is now visible in the top right corner. A dark blue button labeled "Save changes" is located at the bottom center of the dialog, highlighted with an orange circle.

4.4.2. How to Edit Standard Issue and Expiry Date

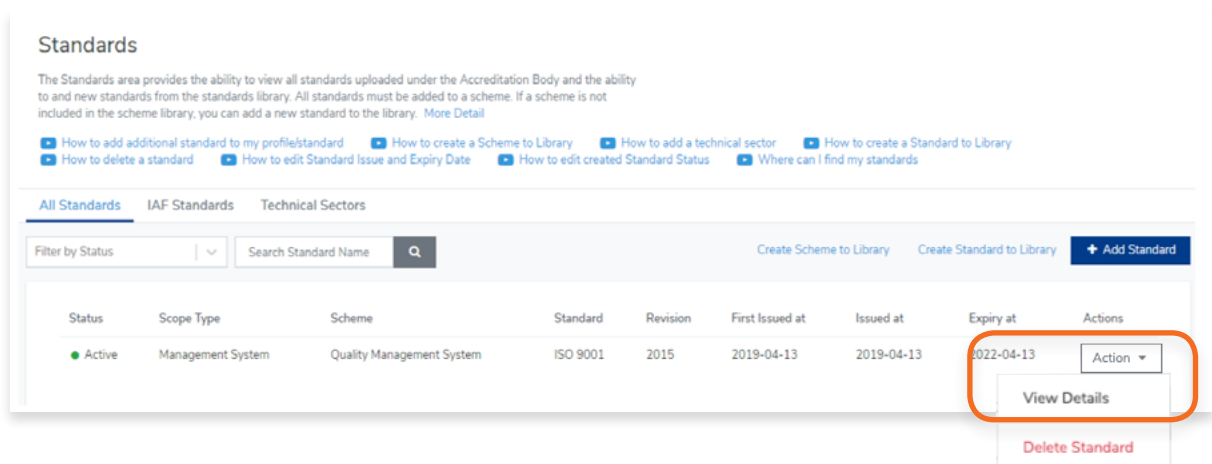
View the step by step guide below or watch the video guide here:

<https://youtu.be/mhn436F7r7k>

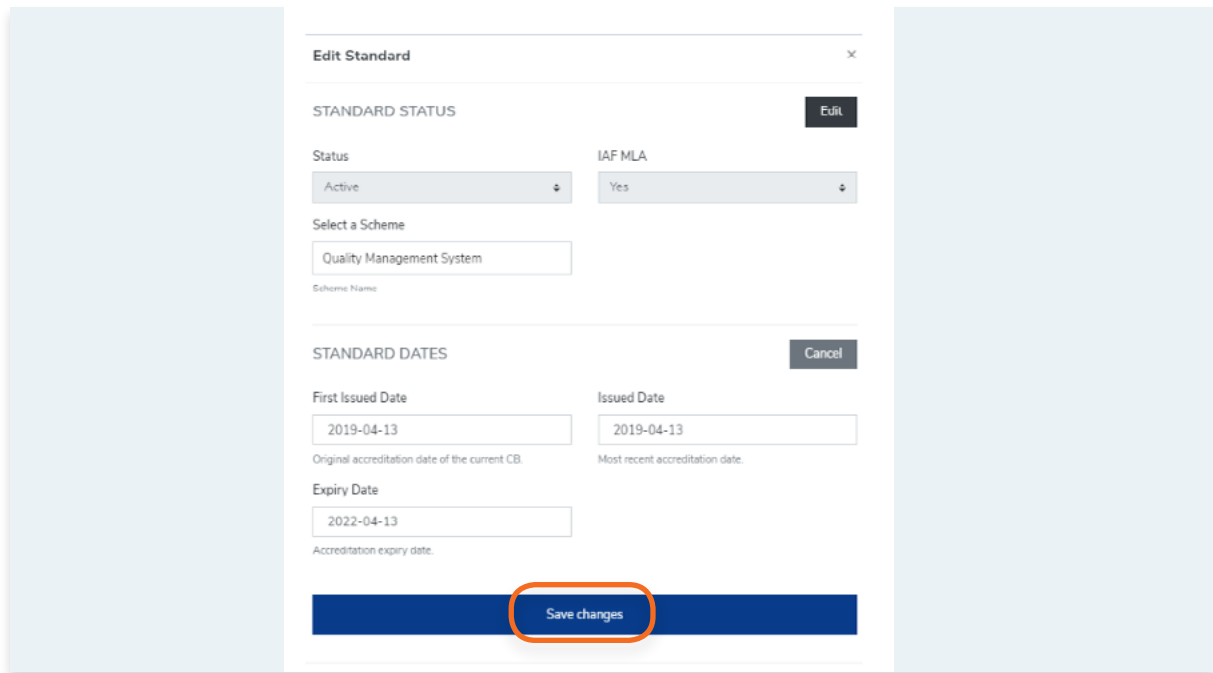
1. From the Dashboard, click **Standards** in the left hand navigation.



2. Find the standard you wish to edit. Click **Action** and Select **View Details**



3. Click Edit in the Standard Dates section to change the standard issue, expiry and first issue dates.



The screenshot displays the 'Edit Standard' form. The 'STANDARD STATUS' section includes a dropdown for 'Status' (set to 'Active'), a dropdown for 'IAF MLA' (set to 'Yes'), and a text input for 'Select a Scheme' (set to 'Quality Management System'). Below this is a 'STANDARD DATES' section with three date inputs: 'First Issued Date' (2019-04-13), 'Issued Date' (2019-04-13), and 'Expiry Date' (2022-04-13). A blue 'Save changes' button at the bottom is circled in orange.

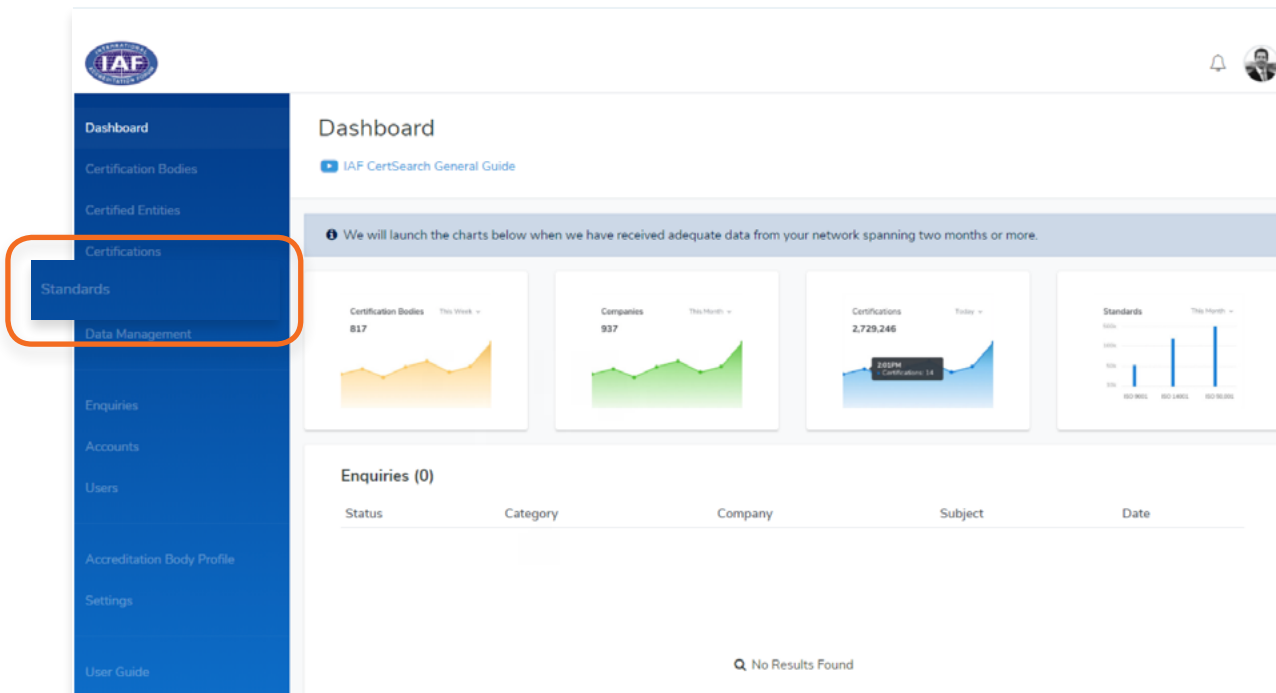
4. Click **Save changes** or click **Cancel** to revert.

4.5. How to Add a Standard to your listing

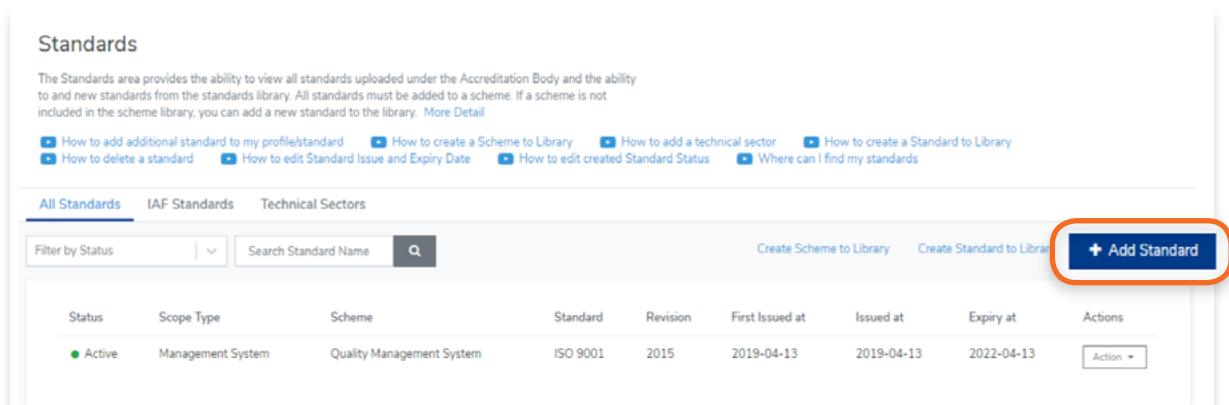
View the step by step guide below or watch the video guide here:

<https://youtu.be/nmXohFvfun5>

1. From the Dashboard, click **Standards** in the left hand navigation.



2. Click **+ Add Standard**



3. Select the Standard Status and the IAF MLA status.

The screenshot shows the 'Add Standard' form with the following fields and values:

- Standard Status:** Active (highlighted with an orange circle)
- IAF MLA:** Yes (highlighted with an orange circle)
- Select a Scheme:** Select or Search by Name (Placeholder text)
- Select a Standard:** Select or Search by Name (Placeholder text)
- First Issued Date:** YYYY-MM-DD (Placeholder text)
- Issued Date:** YYYY-MM-DD (Placeholder text)
- Expiry Date:** YYYY-MM-DD (Placeholder text)

Buttons at the bottom: Close, Assign Standard

4. Select or search the Scheme by Name

Note: If you can't find the Scheme Name from the list, you must create the scheme in the library.

The screenshot shows the 'Add Standard' form with the following fields and values:

- Standard Status:** Active
- IAF MLA:** Yes
- Select a Scheme:** Occupational Health and Safety Certificatio... (highlighted with an orange circle)
- Select a Standard:** ISO 45001:2015
- First Issued Date:** YYYY-MM-DD (Placeholder text)
- Issued Date:** YYYY-MM-DD (Placeholder text)
- Expiry Date:** YYYY-MM-DD (Placeholder text)

Buttons at the bottom: Close, Assign Standard

Follow the video guide here:

https://youtu.be/0keAGAzX_rE

Or go to:

[4.1 How to create a scheme in the Library](#)

5. Select or search a standard by name

Note: If you can't find the Standard Name from the list, you must create the standard in the library.

Follow the video guide here:

https://youtu.be/_JlXqccUDSc

Or go to:

[4.2 How to create a standard in the Library](#)

Add Standard ×

Standard Status: Active

IAF MLA: Yes

Select a Scheme: Occupational Health and Safety Certificatio...
Scheme Name

Select a Standard: ISO 45001:2015
Standard Name

First Issued Date: YYYY-MM-DD
Original accreditation date of the current CB.

Issued Date: YYYY-MM-DD
Most recent accreditation date.

Expiry Date: YYYY-MM-DD
Accreditation expiry date.

Close Assign Standard

6. Enter the First Issued Date, Issued Date, and Expiry Date.

Add Standard

Standard Status: Active | IAF MLA: Yes

Select a Scheme: Occupational Health and Safety Certificatio... | Select a Standard: ISO 45001:2015

First Issued Date: 2019-04-13 | Issued Date: 2019-04-13

Expiry Date: 2022-04-13

Buttons: Close, Assign Standard

7. Click Assign Standard or click Close to cancel

8. A pop up will appear confirming that you have successfully assigned a standard

9. Your newly added standard will now appear on your Standards list. Once a Standard has been added, you can now assign the standard to your Certification Bodies.

Standards

The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. [More Detail](#)

[How to add additional standard to my profile/standard](#) | [How to create a Scheme to Library](#) | [How to add a technical sector](#) | [How to create a Standard to Library](#)
[How to delete a standard](#) | [How to edit Standard Issue and Expiry Date](#) | [How to edit created Standard Status](#) | [Where can I find my standards](#)

Filter by Status: [v] | Search Standard Name: [Q] | Create Scheme to Library | Create Standard to Library | **+ Add Standard**

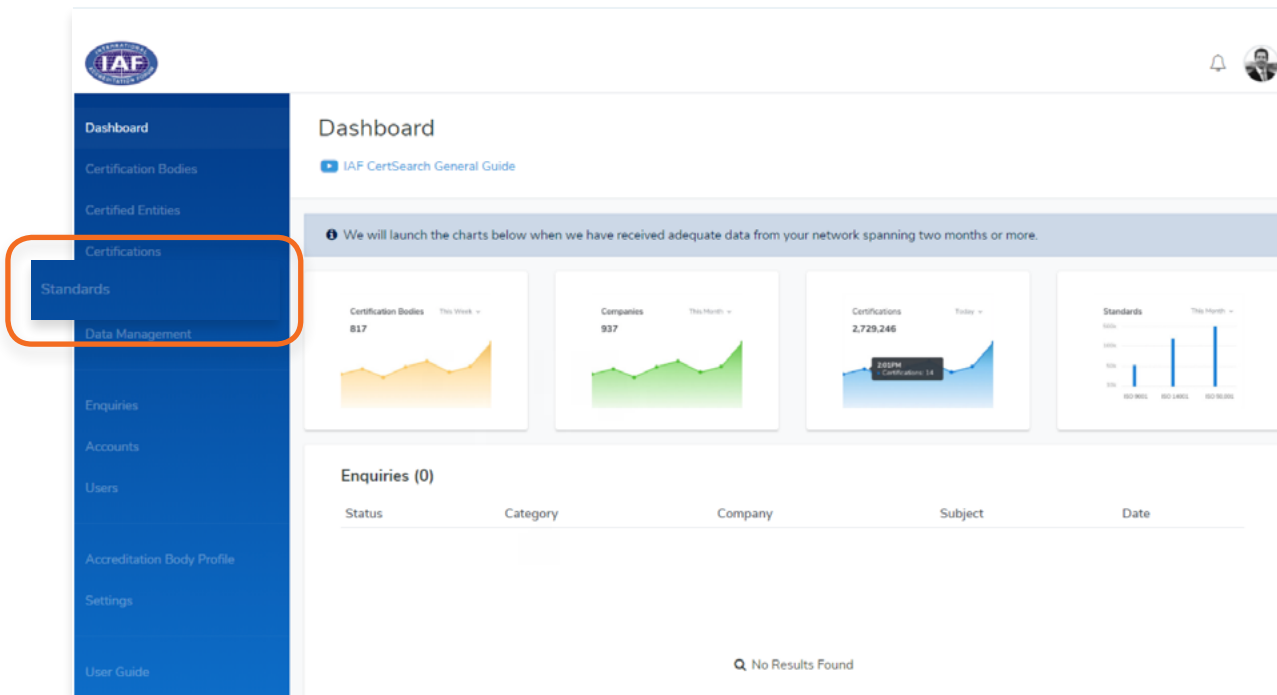
Status	Scope Type	Scheme	Standard	Revision	First Issued at	Issued at	Expiry at	Actions
Active	Management System	Occupational Health and Safety Certification Sc...	ISO 45001	N/A	2019-04-13	2019-04-13	2022-04-13	Action
Active	Management System	Quality Management System	ISO 9001	2015	2019-04-13	2019-04-13	2022-04-13	Action

4.6. How to Delete a Standard

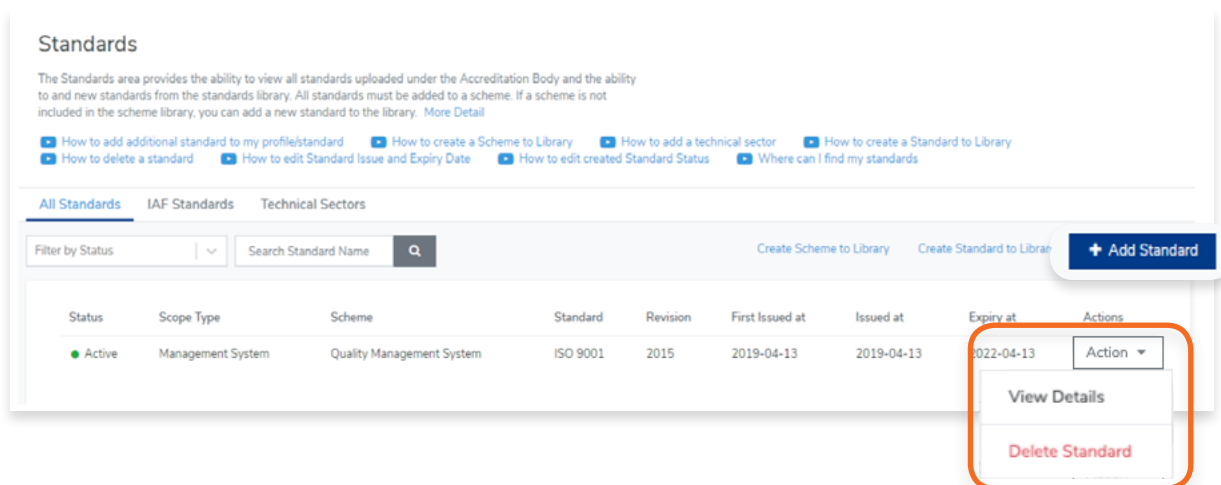
View the step by step guide below or watch the video guide here:

<https://youtu.be/OVs6deDP79k>

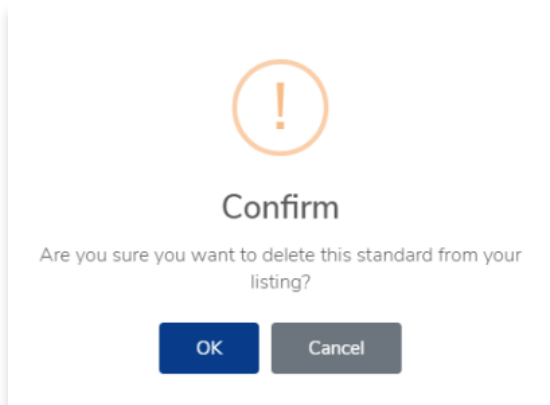
1. From the Dashboard, click **Standards** in the left hand navigation.



2. Find the standard you wish to delete. Click **Action** and Select **Delete Standard**



3. You will then have to confirm to delete the standard from your listing. Click **OK** to confirm deletion or click **Cancel**

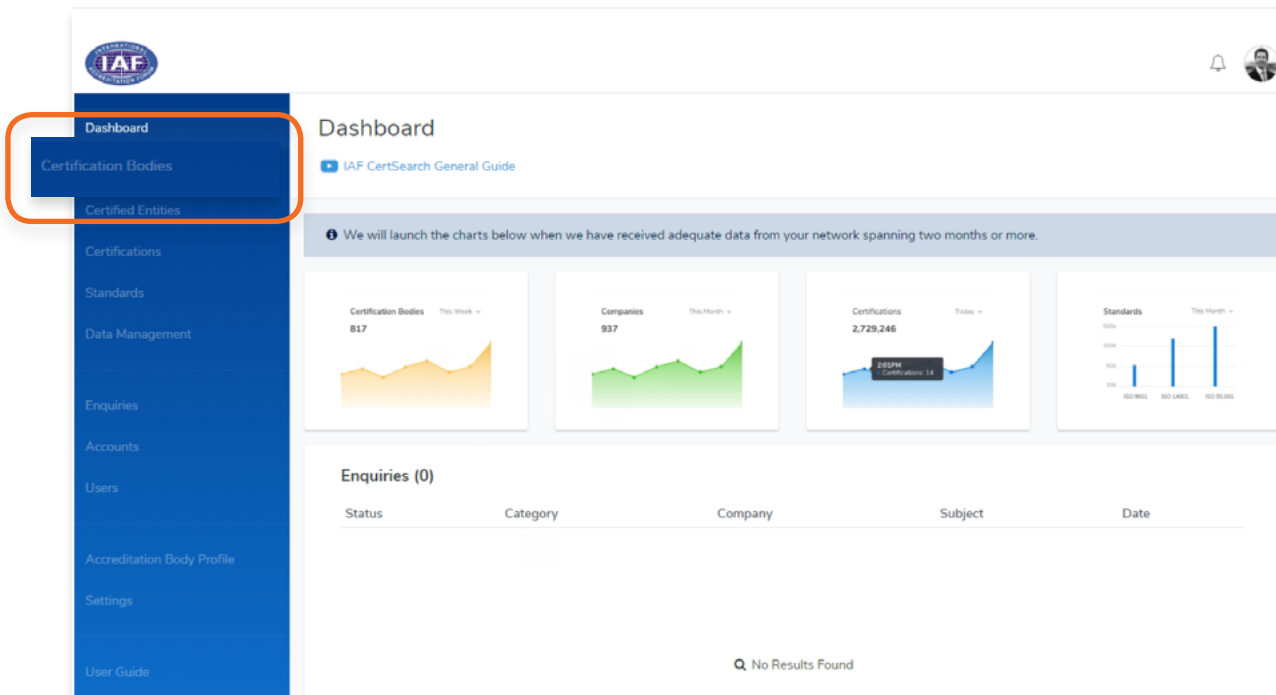


4.7. How to Assign a Standard to a Certification Body

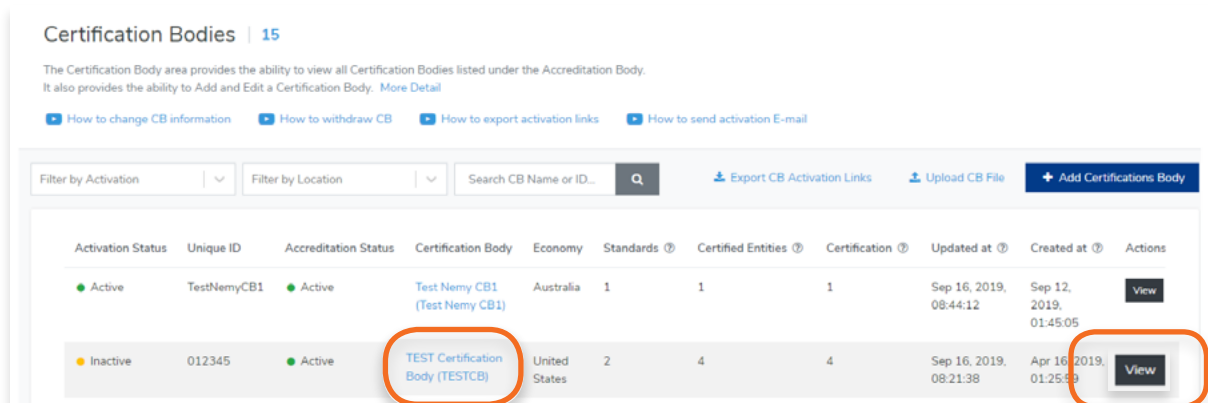
View the step by step guide below or watch the video guide here:

<https://youtu.be/zZd02Q9lym4>

1. From the Dashboard, click **Certification Bodies** in the left hand navigation.

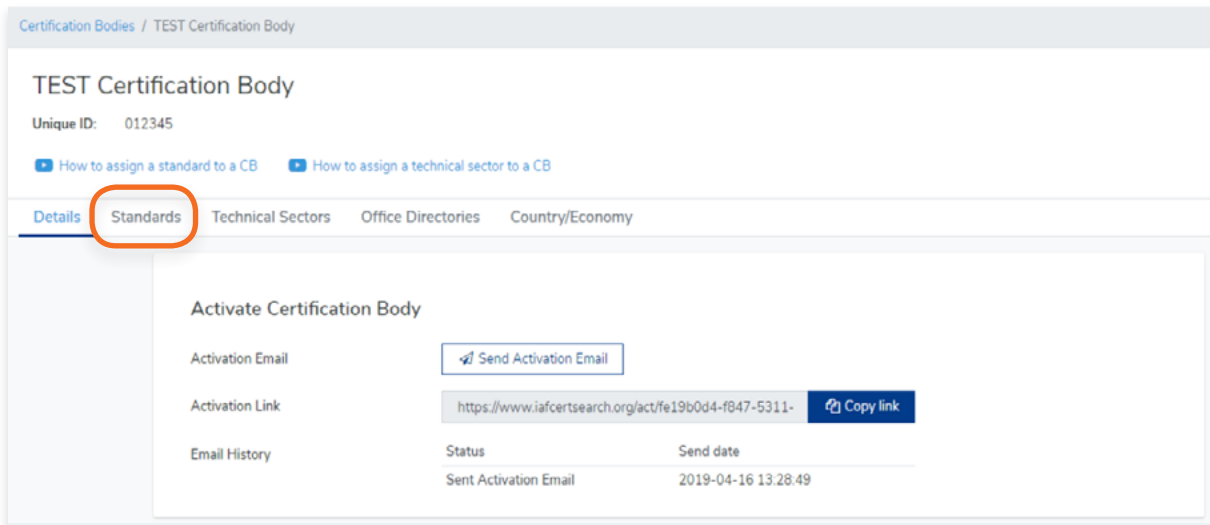


2. In the Certification Bodies page, Search for the Certification Body you want to assign to.
3. Click on the **Certification Body Name** or Click **View**



4.7. How to assign a standard to a Certification Body

4. Click **Standards** on the menu bar



Certification Bodies / TEST Certification Body

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

Standards | Details | Technical Sectors | Office Directories | Country/Economy

Activate Certification Body

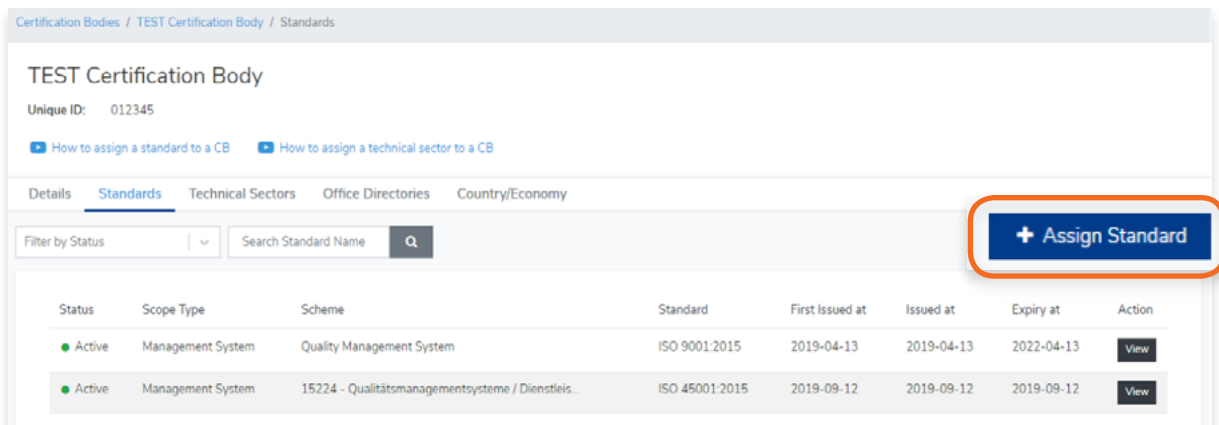
Activation Email: [Send Activation Email](#)

Activation Link: <https://www.iafcertsearch.org/act/fe19b0d4-f847-5311-> [Copy link](#)

Email History

Status	Send date
Sent Activation Email	2019-04-16 13:28:49

5. Click **+ Assign Standard**



Certification Bodies / TEST Certification Body / Standards

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

Details | **Standards** | Technical Sectors | Office Directories | Country/Economy

Filter by Status: Search Standard Name:

+ Assign Standard

Status	Scope Type	Scheme	Standard	First Issued at	Issued at	Expiry at	Action
Active	Management System	Quality Management System	ISO 9001:2015	2019-04-13	2019-04-13	2022-04-13	View
Active	Management System	15224 - Qualitätsmanagementsysteme / Dienstleis...	ISO 45001:2015	2019-09-12	2019-09-12	2019-09-12	View

6. Select the Standard followed by the Scheme.
Enter the First Issued Date, Issued Date and Expiry Date.

Assign Standard x

Select a Standard
ISO 45001
Standard Name

Select a Scheme
Occupational Health and Safety Certification Scheme
Scheme Name

First Issued Date
2019-04-13
Original accreditation date of the current CB.

Issued Date
2019-04-13
Most recent accreditation date.

Expiry Date
2022-04-13
Accreditation expiry date.

Submit

Close

7. Click **Submit**
8. A pop up will appear confirming that the Standard has been assigned to a Certification Body
9. You will see that the newly assigned standard has been added to the Certification Body's list of standards.

Certification Bodies / TEST Certification Body / Standards

TEST Certification Body

Unique ID: 012345

[How to assign a standard to a CB](#) [How to assign a technical sector to a CB](#)

Details **Standards** Technical Sectors Office Directories Country/Economy

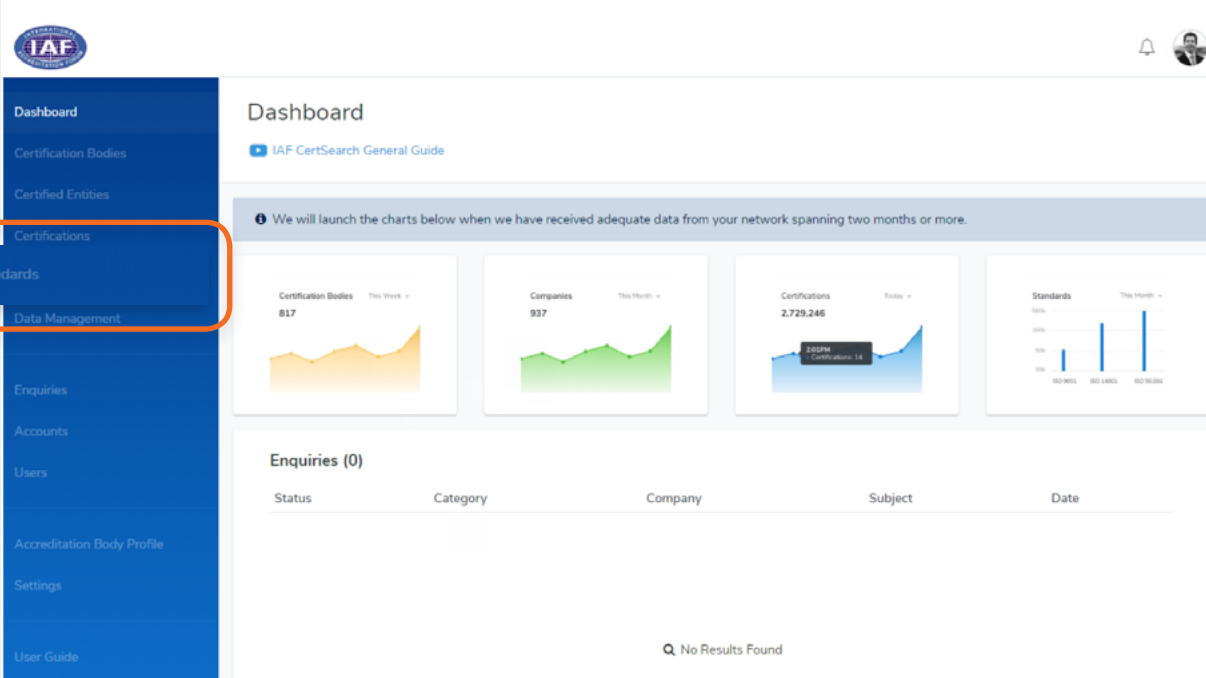
Filter by Status Search Standard Name

[+ Assign Standard](#)

Status	Scope Type	Scheme	Standard	First Issued at	Issued at	Expiry at	Action
Active	Management System	Occupational Health and Safety Certification Sc...	ISO 45001	2019-04-13	2019-04-13	2022-04-13	View
Active	Management System	Quality Management System	ISO 9001:2015	2019-04-13	2019-04-13	2022-04-13	View
Active	Management System	15224 - Qualitätsmanagementsysteme / Dienstleis...	ISO 45001:2015	2019-09-12	2019-09-12	2019-09-12	View

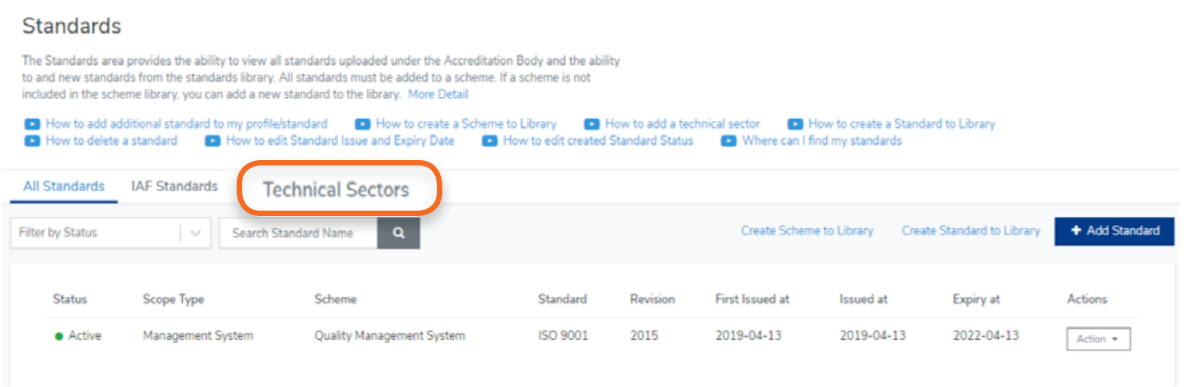
4.8. How to View Technical Sectors

1. From the Dashboard, click **Standards** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left, a blue navigation menu is visible with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards (highlighted with an orange box), Data Management, Enquiries, Accounts, Users, Accreditation Body Profile, Settings, and User Guide. The main content area is titled 'Dashboard' and includes a link to 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date. The table is currently empty, and a search icon indicates 'No Results Found'.

2. Click **Technical Sectors** in the menu bar



The screenshot shows the 'Standards' page. At the top, it says 'Standards' and provides a brief description: 'The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. More Detail'. Below this are several links: 'How to add additional standard to my profile/standard', 'How to create a Scheme to Library', 'How to add a technical sector', 'How to create a Standard to Library', 'How to delete a standard', 'How to edit Standard Issue and Expiry Date', 'How to edit created Standard Status', and 'Where can I find my standards'. The 'Technical Sectors' tab in the menu bar is highlighted with an orange box. Below the menu bar, there are filters for 'Filter by Status' and a search box for 'Search Standard Name'. There are also buttons for 'Create Scheme to Library', 'Create Standard to Library', and '+ Add Standard'. A table is displayed with the following columns: Status, Scope Type, Scheme, Standard, Revision, First Issued at, Issued at, Expiry at, and Actions. The table contains one row: Active, Management System, Quality Management System, ISO 9001, 2015, 2019-04-13, 2019-04-13, 2022-04-13, and an Action button.

Status	Scope Type	Scheme	Standard	Revision	First Issued at	Issued at	Expiry at	Actions
Active	Management System	Quality Management System	ISO 9001	2015	2019-04-13	2019-04-13	2022-04-13	Action

3. Here you will find a list of all your Technical Sectors

The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. [More Detail](#)

[How to add additional standard to my profile/standard](#)
[How to create a Scheme to Library](#)
[How to add a technical sector](#)
[How to create a Standard to Library](#)
[How to delete a standard](#)
[How to edit Standard Issue and Expiry Date](#)
[How to edit created Standard Status](#)
[Where can I find my standards](#)

All Standards IAF Standards **Technical Sectors**

[+ Add Technical Sector](#)

Sector Name	Updated at	Created at	Actions
Manuf. of coke and refined petroleum products	2018-10-08	2019-03-14	Delete
Printing companies	2018-09-18	2019-09-12	Delete
Publishing companies	2018-09-18	2019-09-12	Delete
Pulp, Paper and paper products	2019-08-30	2019-08-30	Delete
Wood and wood products	2018-09-18	2019-09-12	Delete
Leather and Leather products	2019-07-02	2019-08-22	Delete
Textiles and textile products	2018-09-18	2019-09-12	Delete
Food products, beverages and tobacco	2018-09-18	2019-09-12	Delete
Mining and Quarrying	2018-10-08	2019-08-22	Delete
Agriculture, fishing	2018-09-18	2019-08-22	Delete

4.9. How to Edit Technical Sectors

You cannot edit your Technical Sectors. If you wish to make changes to a technical sector, you have to delete the Technical Sector and add it again.

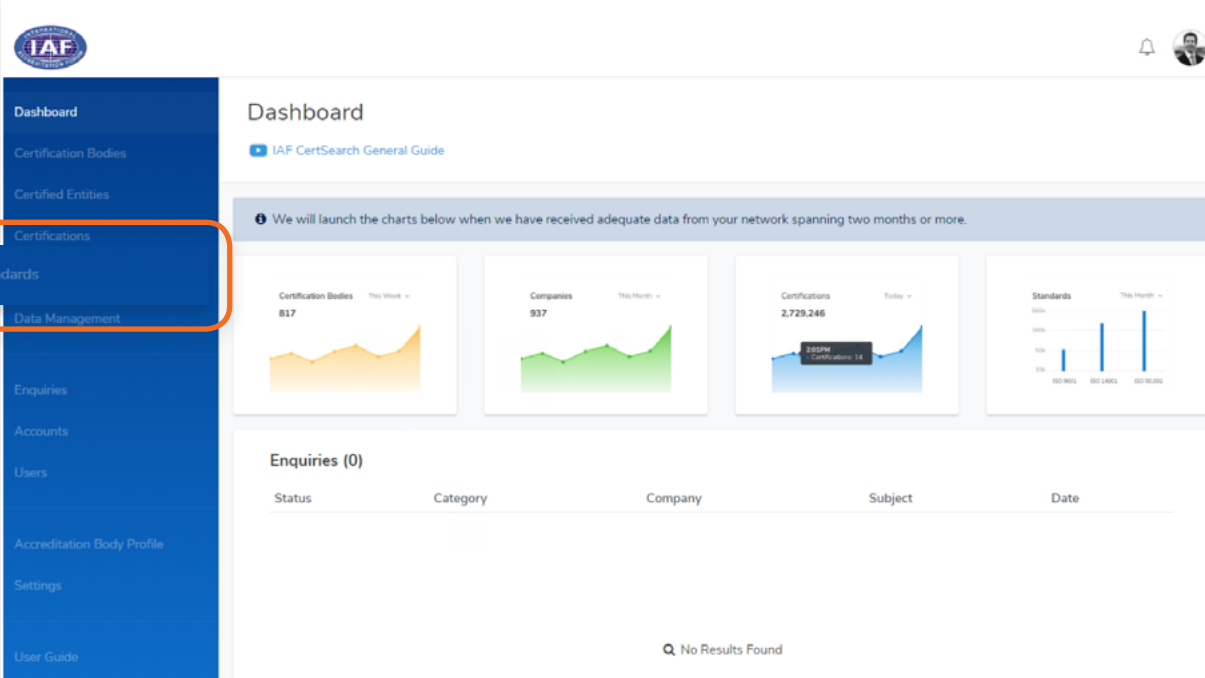
For more information, go to:

[4.10 How to delete Technical Sectors](#)

[4.11 How to add Technical Sectors](#)

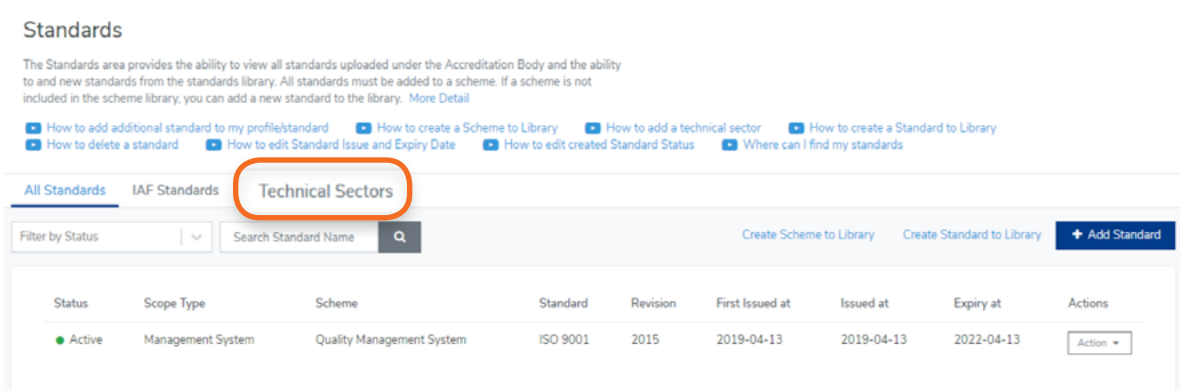
4.10. How to Delete Technical Sectors

1. From the Dashboard, click **Standards** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left, a vertical navigation menu is displayed with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards (highlighted with an orange box), Data Management, Enquiries, Accounts, Users, Accreditation Body Profile, Settings, and User Guide. The main content area is titled 'Dashboard' and includes a link to 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date. The table is currently empty, and a search icon with the text 'No Results Found' is visible at the bottom right of the table area.

2. Click **Technical Sectors** in the menu bar



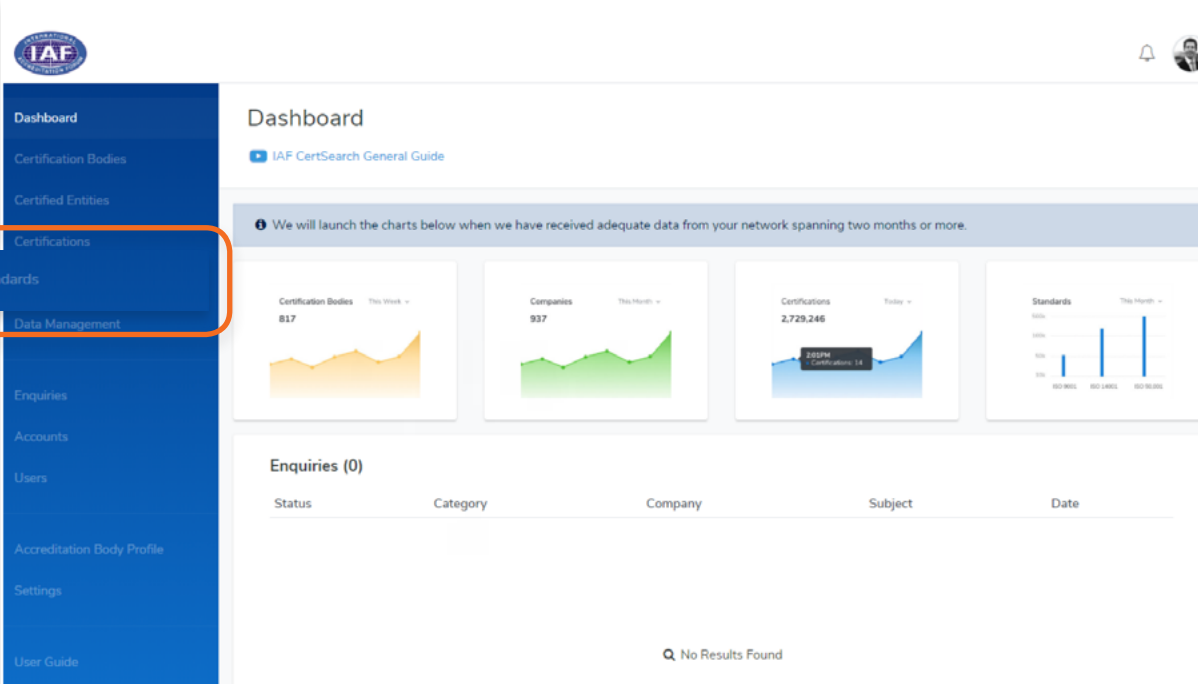
The screenshot shows the 'Standards' page in the IAF system. The page title is 'Standards'. Below the title, there is a descriptive paragraph: 'The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. [More Detail](#)'. Below this text are several links: 'How to add additional standard to my profile/standard', 'How to create a Scheme to Library', 'How to add a technical sector', 'How to create a Standard to Library', 'How to delete a standard', 'How to edit Standard Issue and Expiry Date', 'How to edit created Standard Status', and 'Where can I find my standards'. Below the links is a navigation bar with three tabs: 'All Standards', 'IAF Standards', and 'Technical Sectors' (highlighted with an orange box). Below the navigation bar is a search bar with the text 'Filter by Status' and a dropdown arrow, and a search box with the text 'Search Standard Name' and a search icon. To the right of the search bar are three buttons: 'Create Scheme to Library', 'Create Standard to Library', and '+ Add Standard'. Below the search bar is a table with the following columns: Status, Scope Type, Scheme, Standard, Revision, First Issued at, Issued at, Expiry at, and Actions. The table contains one row of data: Status: Active (indicated by a green dot), Scope Type: Management System, Scheme: Quality Management System, Standard: ISO 9001, Revision: 2015, First Issued at: 2019-04-13, Issued at: 2019-04-13, Expiry at: 2022-04-13, and Actions: Action (with a dropdown arrow).

4.11. How to Add Technical Sectors

View the step by step guide below or watch the video guide here:

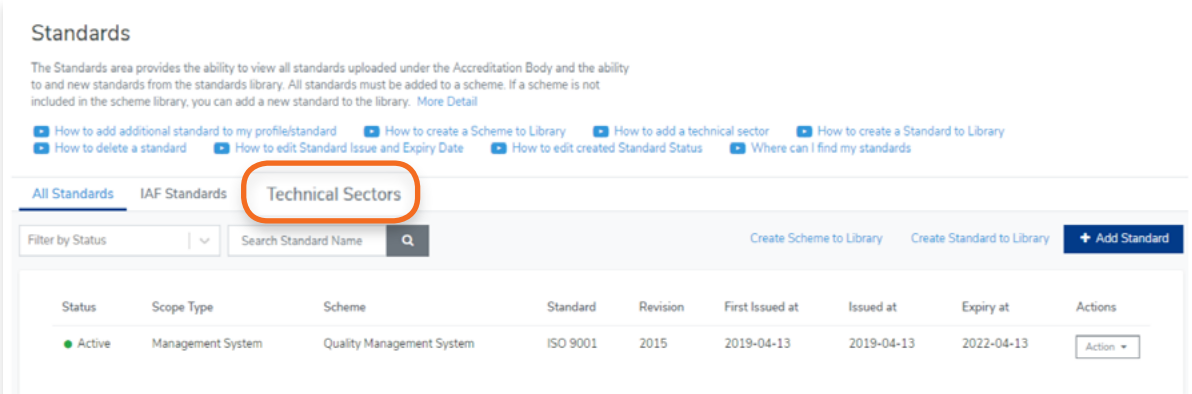
<https://youtu.be/XxY0qKDrLaA>

1. From the Dashboard, click **Standards** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists various options: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards (highlighted with an orange box), Data Management, Enquiries, Accounts, Users, Accreditation Body Profile, Settings, and User Guide. The main dashboard area features a header with the IAF logo and a notification bell. Below the header, there's a section for 'Enquiries (0)' with a table that has columns for Status, Category, Company, Subject, and Date. The table is currently empty, and a search icon indicates 'No Results Found'. Above the table, there are four charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. A message above the charts states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.'

2. Click **Technical Sectors** in the menu bar



The screenshot shows the 'Standards' management page. At the top, there's a description: 'The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add and new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. [More Detail](#)'. Below this, there are several links: 'How to add additional standard to my profile/standard', 'How to create a Scheme to Library', 'How to add a technical sector', 'How to create a Standard to Library', 'How to delete a standard', 'How to edit Standard Issue and Expiry Date', 'How to edit created Standard Status', and 'Where can I find my standards'. The main content area has three tabs: 'All Standards', 'IAF Standards', and 'Technical Sectors' (highlighted with an orange box). Below the tabs, there's a search bar with 'Filter by Status' and 'Search Standard Name'. To the right, there are buttons for 'Create Scheme to Library', 'Create Standard to Library', and '+ Add Standard'. Below the search bar is a table with columns: Status, Scope Type, Scheme, Standard, Revision, First Issued at, Issued at, Expiry at, and Actions. The table contains one row: Status: Active, Scope Type: Management System, Scheme: Quality Management System, Standard: ISO 9001, Revision: 2015, First Issued at: 2019-04-13, Issued at: 2019-04-13, Expiry at: 2022-04-13, Actions: Action.

3. Click + Add Technical Sector

The Standards area provides the ability to view all standards uploaded under the Accreditation Body and the ability to add and new standards from the standards library. All standards must be added to a scheme. If a scheme is not included in the scheme library, you can add a new standard to the library. [More Detail](#)

- [How to add additional standard to my profile/standard](#)
- [How to create a Scheme to Library](#)
- [How to add a technical sector](#)
- [How to create a Standard to Library](#)
- [How to delete a standard](#)
- [How to edit Standard issue and Expiry Date](#)
- [How to edit created Standard Status](#)
- [Where can I find my standards](#)

All Standards IAF Standards **Technical Sectors**

+ Add Technical Sector

Sector Name	Updated at	Created at	Actions
Manuf. of coke and refined petroleum products	2018-10-08	2019-03-14	Delete
Printing companies	2018-09-18	2019-09-12	Delete
Publishing companies	2018-09-18	2019-09-12	Delete
Pulp, Paper and paper products	2019-08-30	2019-08-30	Delete
Wood and wood products	2018-09-18	2019-09-12	Delete
Leather and Leather products	2019-07-02	2019-08-22	Delete
Textiles and textile products	2018-09-18	2019-09-12	Delete
Food products, beverages and tobacco	2018-09-18	2019-09-12	Delete
Mining and Quarrying	2018-10-08	2019-08-22	Delete
Agriculture, fishing	2018-09-18	2019-08-22	Delete

4. A pop up will appear.

Add Technical Sector
×

Sector Name

Close
Save changes

5. Enter the Sector Name and click Save changes or click Close to cancel.

Add Technical Sector
×

Sector Name

Close
Save changes

6. Your new technical sector will now be added to the list.



The screenshot shows a web application interface with three tabs: 'All Standards', 'IAF Standards', and 'Technical Sectors'. The 'Technical Sectors' tab is active. Below the tabs is a table with three columns: 'Sector Name', 'Updated at', and 'Created at'. The first row, 'Agriculture, fishing', is highlighted with an orange border. The other rows are 'Manuf. of coke and refined petroleum products', 'Printing companies', and 'Publishing companies'.

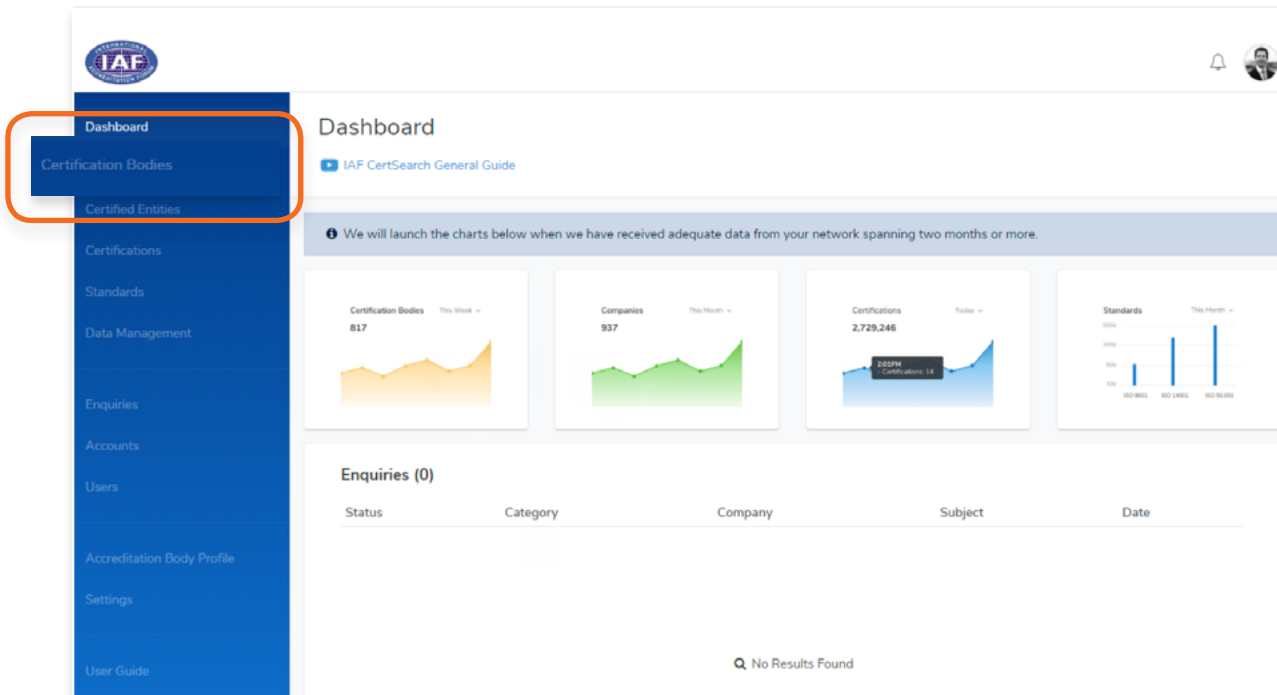
Sector Name	Updated at	Created at
Agriculture, fishing	2018-09-18	2019-08-22
Manuf. of coke and refined petroleum products	2018-10-08	2019-03-14
Printing companies	2018-09-18	2019-09-12
Publishing companies	2018-09-18	2019-09-12

4.12. How to Assign a Technical Sector to a Certification Body

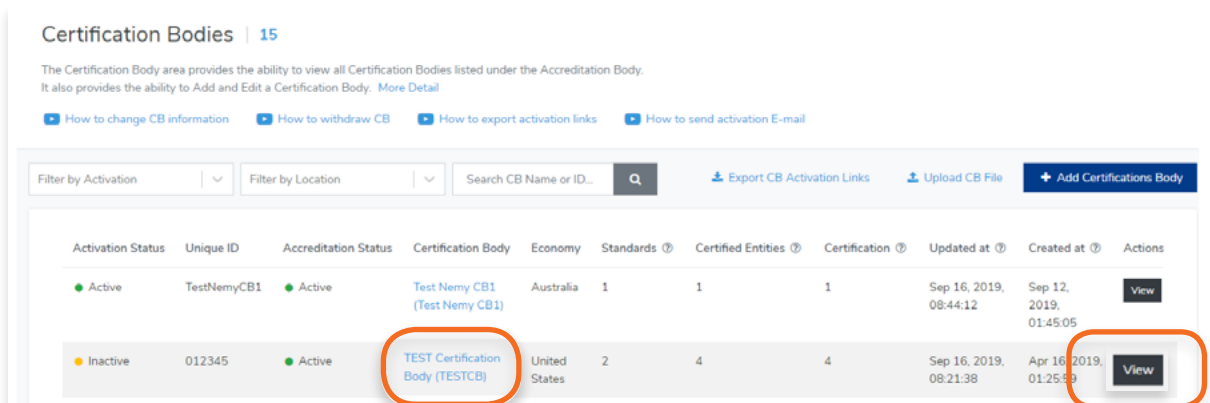
View the step by step guide below or watch the video guide here:

<https://youtu.be/zZd02Q9lym4>

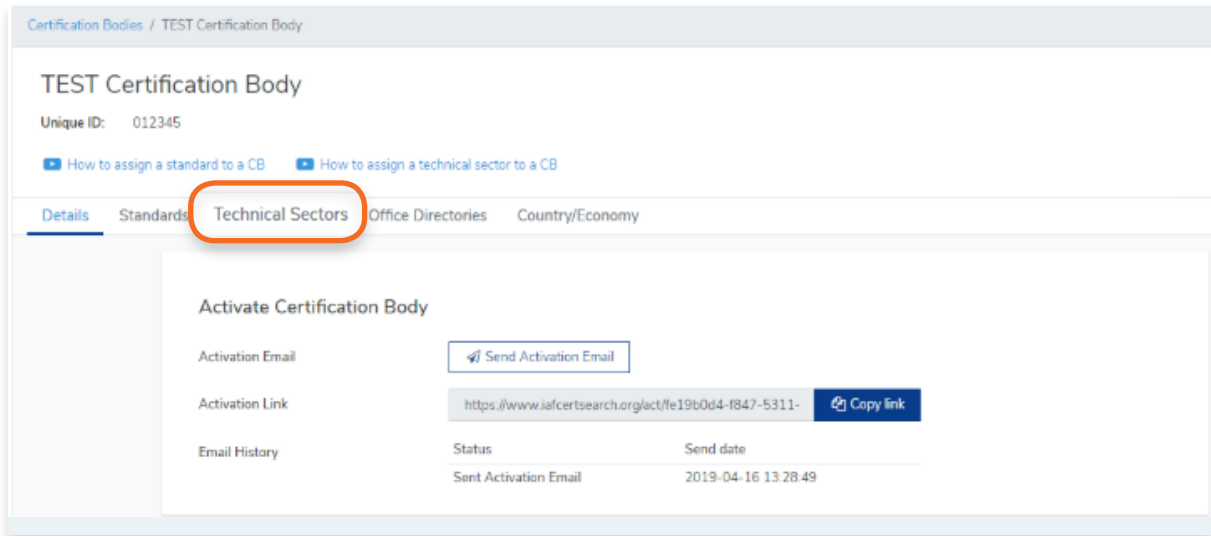
1. From the Dashboard, click **Certification Bodies** in the left hand navigation.



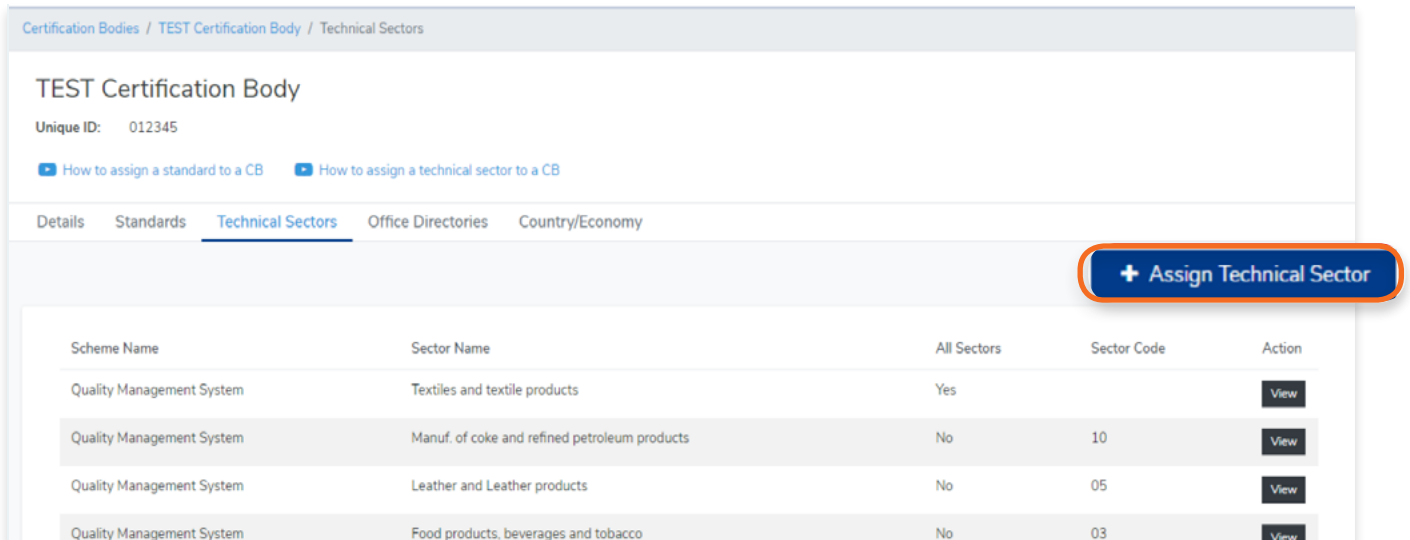
2. In the Certification Bodies page, Search for the Certification Body you want to assign to.
3. Click on the **Certification Body Name** or Click **View**



4. Click **Technical Sectors** in the menu bar



5. Here you will find a list of technical sectors assigned to a Certification Body.
Click **+ Assign Technical Sector**



6. Select the Scheme Name

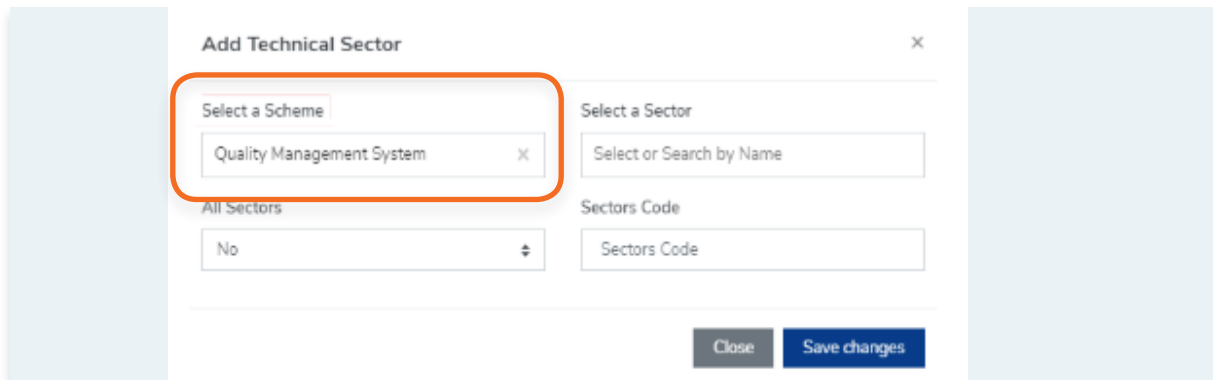
Note: If you can't find the Scheme Name from the list, you must create the scheme in the library.

Follow the video guide here:

https://youtu.be/0keAGAzX_rE

Or go to:

[4.1 How to create a scheme in the Library](#)



The screenshot shows a dialog box titled "Add Technical Sector" with a close button (X) in the top right corner. The dialog contains several input fields: "Select a Scheme" (highlighted with an orange box and containing "Quality Management System"), "Select a Sector" (containing "Select or Search by Name"), "All Sectors" (a dropdown menu set to "No"), and "Sectors Code" (containing "Sectors Code"). At the bottom right, there are two buttons: "Close" and "Save changes".

7. Select or Search a sector by name

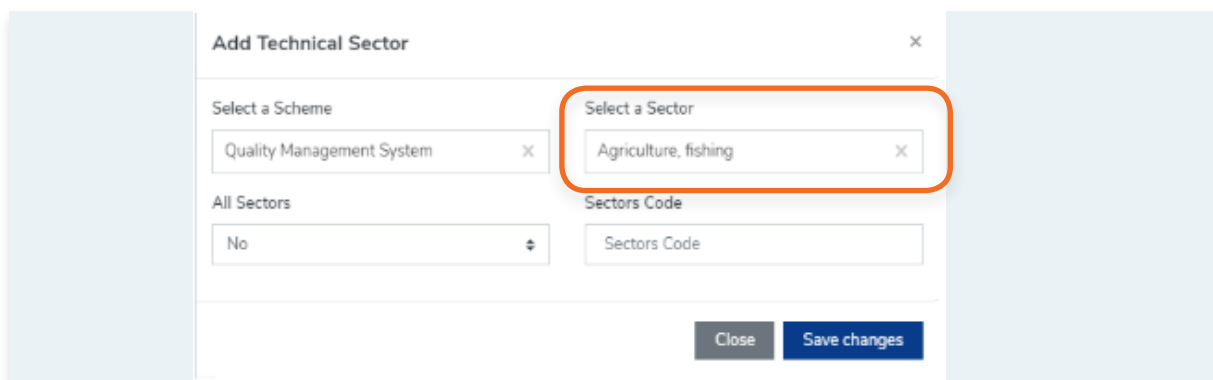
Note: If you can't find the sector from the list, you must create the sector first.

Follow the video guide here:

<https://youtu.be/XxY0qKDrLaA>

Or go to:

[4.10 How to add Technical Sectors](#)



The screenshot shows the same "Add Technical Sector" dialog box. In this view, the "Select a Sector" field (highlighted with an orange box) contains the text "Agriculture, fishing". The "Select a Scheme" field still contains "Quality Management System". The "All Sectors" dropdown is set to "No", and the "Sectors Code" field contains "Sectors Code". The "Close" and "Save changes" buttons are visible at the bottom right.

8. Indicate if it is for All Sectors

If Yes, proceed to clicking Save Changes. In No, enter the Sector Code and click Save changes.

The screenshot shows a modal window titled "Add Technical Sector". It contains several input fields: "Select a Scheme" with "Quality Management System", "Select a Sector" with "Agriculture, fishing", and "All Sectors" with "No" (highlighted by an orange box). There are also "Sectors Code" fields and "Close" and "Save changes" buttons at the bottom.

9. Click Close to cancel.

10. The technical sector is now assigned to the Certification Body.

The screenshot shows the "TEST Certification Body" page with the "Technical Sectors" tab selected. A table lists the assigned technical sectors. The "All Sectors" column is highlighted in grey for the "Textiles and textile products" row.

Scheme Name	Sector Name	All Sectors	Sector Code	Action
Quality Management System	Agriculture, fishing	No	01	View
Quality Management System	Textiles and textile products	Yes		View
Quality Management System	Manuf. of coke and refined petroleum products	No	10	View
Quality Management System	Leather and Leather products	No	05	View
Quality Management System	Food products, beverages and tobacco	No	03	View

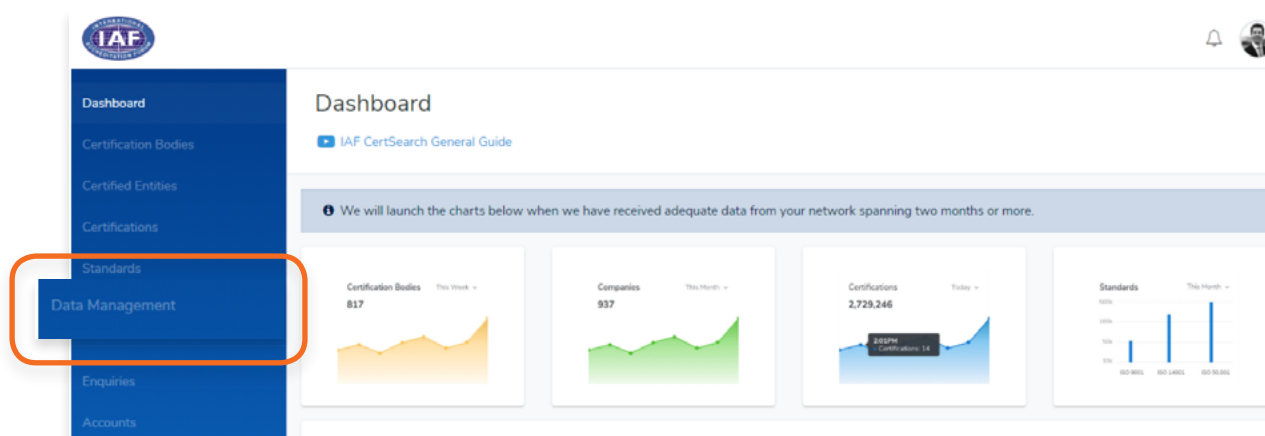
5. Data Management

5.1. Overview of Data Management

View the step by step guide below or watch the video guide here:

<https://youtu.be/TjZYCHWSJss>

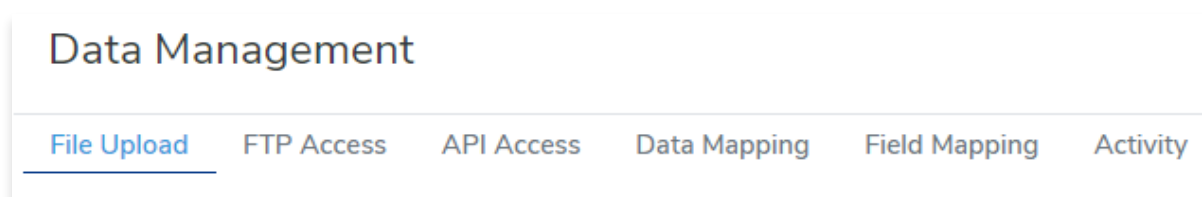
From the **Dashboard**, click **Data Management** in the left hand navigation.



The Data Management feature is where you upload data. It provides access to the manual and automated upload processes.

The menu bar is separated into the following sections:

- **File Upload** - manually uploading - excel and xml files
- **FTP Access** - schedule automated file (excel and xml) upload using FTP
- **API Access** - automated upload using API
- **Data Mapping** - Mapping data values in CB data to IAF Data values
- **Field Mapping** - Mapping fields in CB data to IAF fields
- **Activity** -



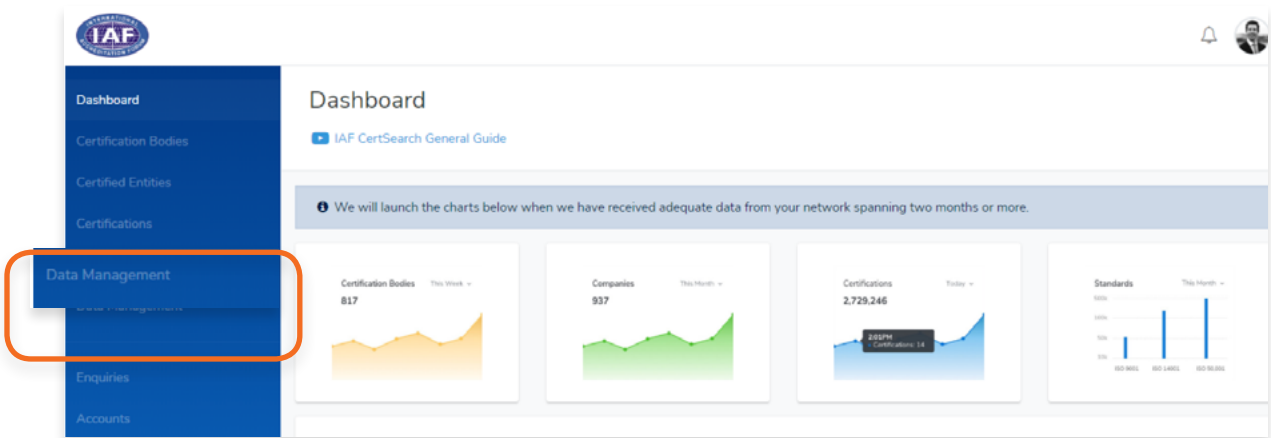
5.2. How to Prepare Certification Body Data Using Excel

View the step by step guide below or watch the video guide here:

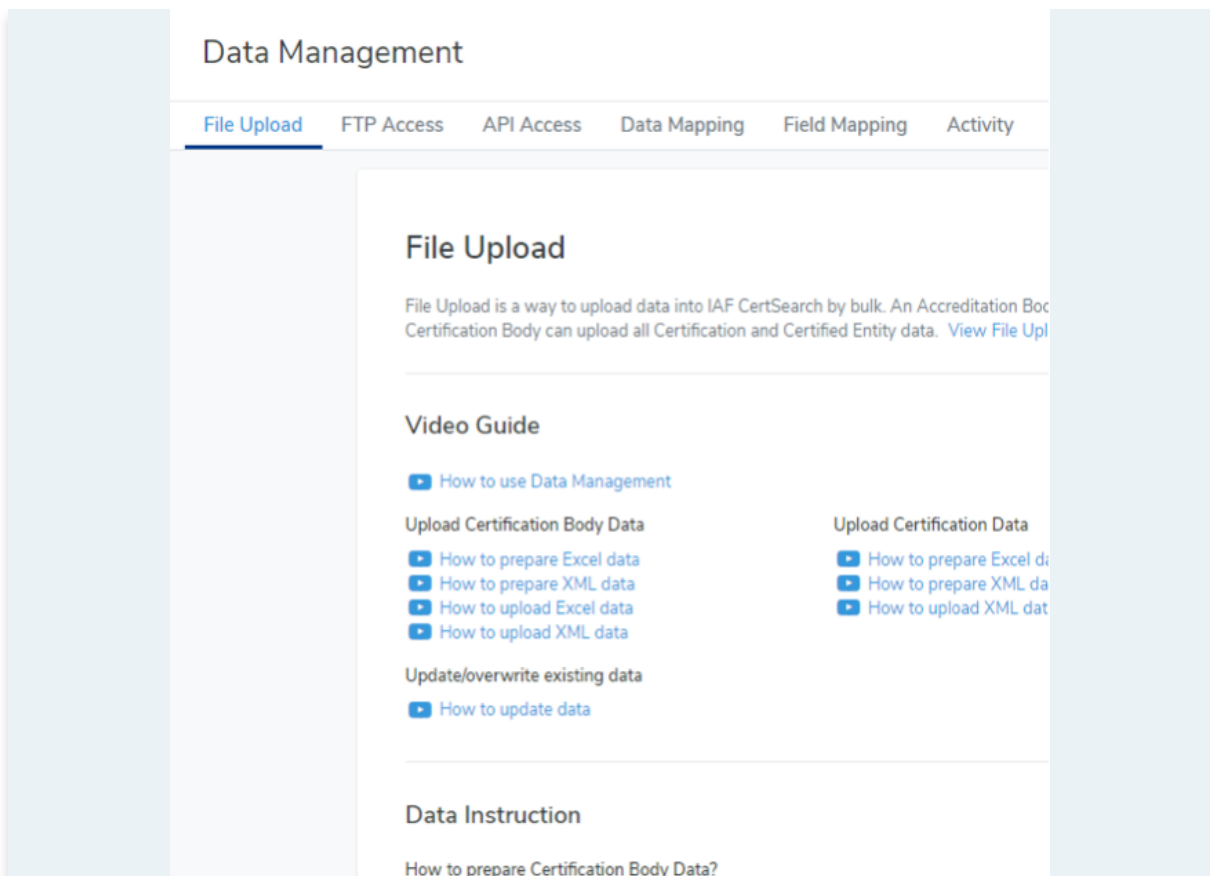
<https://youtu.be/5rOwT5AFWnI>

This section will show you where to find the Instructions on how to prepare your data in Excel.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **Excel Data Instruction** under Data Instruction



- Once clicked, it will automatically download the instructions on how to prepare your data. It can be opened using Microsoft Excel or any other similar program or application. The fields are the same format as the excel upload template. The instructions will include a glossary, correct examples, what to do, what not to do, incorrect examples, and suggestions on how to resolve errors for every field.

Glossary	Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website
	Mandatory Field provided in the API for external use of IAF/CERTSEARCH. "CB Identity Number" is a unique identification for the CB. The "CB Identity Number" makes it possible to identify which CBs are in the AD network what data in the register belongs to the CB. When the API updates additional data in the future (i.e. accreditation data) the system will look up the "CB Identity Number" to maintain integrity of data. The "CB Identity Number" can be any alpha-numeric number.	Certification Body Name is the full name of the CB	Certification Body Acronym	Certification Body website
Mandatory Status	Mandatory	Mandatory	Mandatory	
Correct example	AB01CB00001 AB01CB00002 AB01CB00003	Global Compliance Plus Pty Ltd Many Certification Pty Ltd Canadian Certification Body	GCP MCP CanCert	http://www.GlobalCompliance.net https://www.ManyCP.com http://www.CanCert.com.ca
Do's	Ensure that the Certification Body Identity Number is Unique Ensure that the Certification Body Identity Number is the same in each tab for each Certification Body. If it's not the same the data in the other tabs will not be matched. Ensure that every unique Certification Body Identity Number in other tabs is in its exact format (a mismatch in spaces, capitalization, and others will cause an error and data will not be matched). This cell must be in TEXT format. All cells must be in text format.	Ensure that the Certification Body Name is unique. An Accreditation Body can't have two Certification Bodies with the same name. Ensure the Certification Body name matches the specified Certification Body Identity Number across all tabs. If it's not the same the data in the other tabs will not be matched. It is recommended that Certification Body Name should be in written in English. This cell must be in TEXT format. All cells must be in TEXT format.	It is recommended that Certification Body Acronym should be in written in english. This cell must be in TEXT format. All cells must be in TEXT format.	Use the correct format of the URL at all times. This cell must be in TEXT format. All cells must be in TEXT format. Include http:// or https://
Don'ts	Don't use the sample example "UNIQUE-CB01" create your own ID. Don't leave the Certification Body Identity Number cell blank. Don't merge multiple Certification Body Identity Numbers in one cell. Please make sure that each cell is containing only 1 Certification Body Identity Number to correspond to 1 Certification Body. Don't use 1 Certification Body Identity Number for multiple Certification Body Names.	Do not use 1 Certification Body Name for multiple Certification Body Identity Numbers. Don't leave the Certification Body Name cell blank. Do not merge multiple CB Names in 1 cell.	Do not merge multiple Certification Body Acronyms in 1 cell.	
Incorrect example	UNIQUE-CB01 (these two cells have been merged, it won't be accepted) UNIQUE-CB01 (Don't use the sample example "UNIQUE-CB01" create your own) (Don't leave the cell blank) UNIQUE-CB01, UNIQUE-CB04 (Don't enter two Certification Body Identity Numbers in one cell)	Global Compliance Plus Pty Ltd. (these two cells have been merged, it won't be accepted) (Don't leave the cell blank) Global Compliance Plus Pty Ltd, Many Certification Pty Ltd. (Don't enter two Certification Body Names in one cell)	GCP (these two cells have been merged, it won't be accepted) (Don't leave the cell blank) GCP, MCP, CanCert (Don't enter two Certification Body Acronyms in one cell)	http://www.global-compliance.net (these two cells have been merged, it won't be accepted) http://www.GlobalCompliance.net , https://www.ManyCP.com (Don't enter two Websites in one cell)

Sample file.

To help you further in populating your data, an Excel Sample File can also be downloaded. Only use this sample as a guide and do not use this to upload your data. Use the Excel Template to populate your data.

Data Instruction

How to prepare Certification Body Data?

[Excel Data Instruction](#) [XML Data Instruction](#)

Download Data Templates

Upload Certification Body

Excel Template

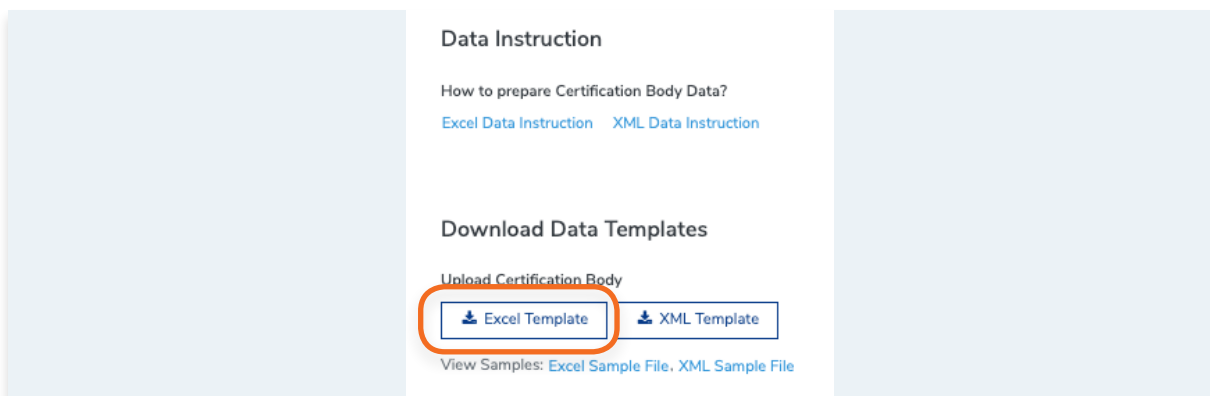
XML Template

View Samples: [Excel Sample File](#), [XML Sample File](#)

5.3. How to Download and Populate Certification Body Data Template in Excel

This will show you where to download the Certification Body data template which you will use to upload certification body data into IAF CertSearch.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.
2. Click **Excel Template** under Download Data Templates



3. Once clicked, it will automatically download the Excel template. It can be opened using Microsoft Excel or any other similar program.
4. Open the Excel Template and populate the data. Make sure that all fields have been filled up correctly and all the tabs below have been populated.

The screenshot shows an Excel spreadsheet with the following data:

1	A	B	C	D	E	F
	Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address
2	UNIQUEID-CB01	Global Compliance Plus Pty Ltd	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test
3	UNIQUEID-CB02	Certification Global Inc	CGInc	www.Certificationglobal.test	Mrs Grace Example	grace@certificationglobal.test
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
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28						
29						
30						
31						

The bottom navigation bar shows several tabs: 'Certification Bodies', 'Office Directories', 'Standards & Schemes', 'Technical Sectors', and 'Certification Body Countries'. The 'Certification Bodies' tab is highlighted with a red circle.

5. Save the file.

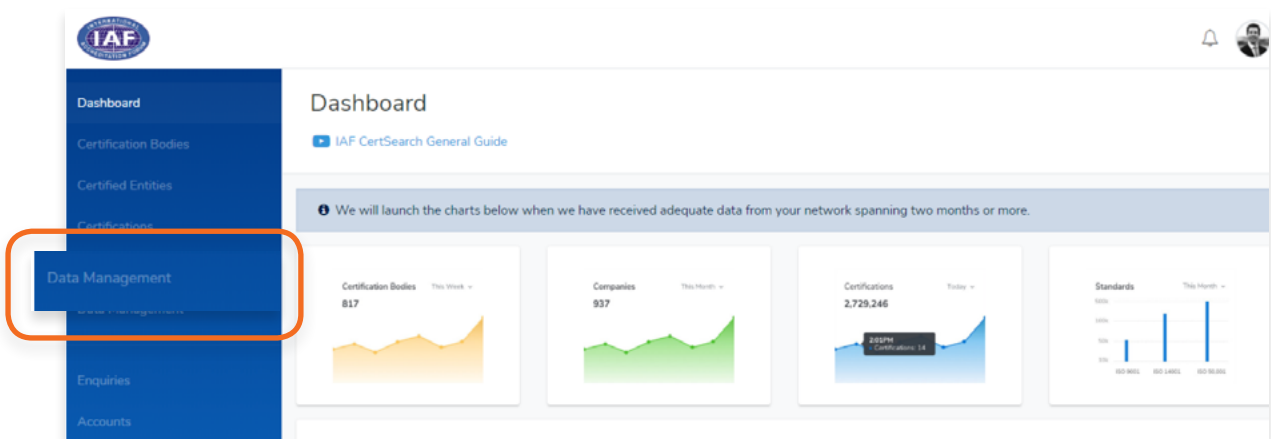
5.4. How to Prepare Certification Body Data Using XML

View the step by step guide below or watch the video guide here:

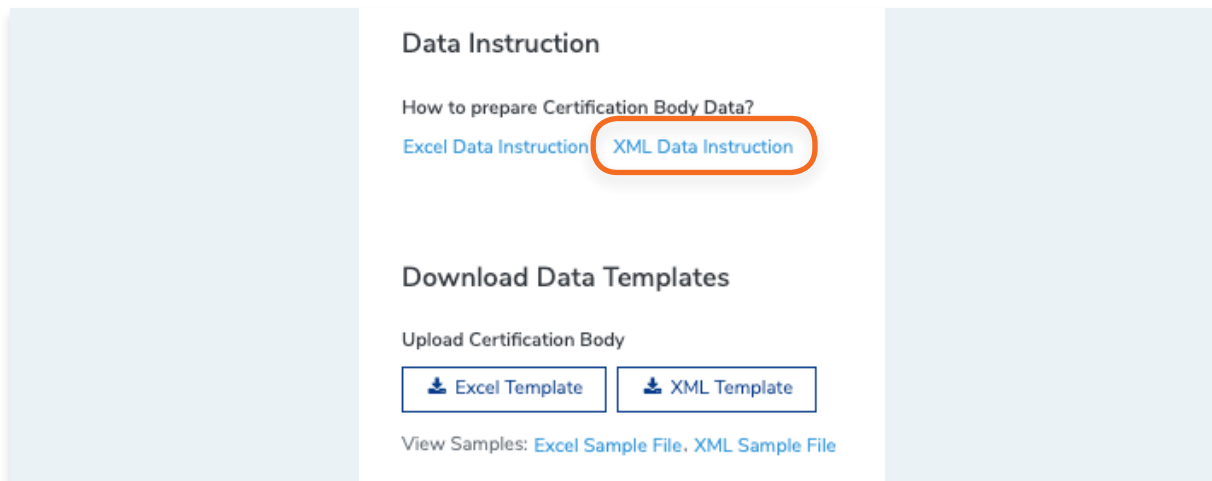
<https://youtu.be/MibX9VKQDPQ>

This section will show you where to find the Instructions on how to prepare your data in Excel.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **XML Data Instructions** under Data Instruction



- Once clicked, it will automatically download the instructions on how to prepare your data. It can be opened using Microsoft Excel or any other similar program or application. The elements are the same format as the xml upload template. The instructions will include a glossary, correct examples, what to do, what not to do, incorrect examples, and suggestions on how to resolve errors for XML element.

Glossary	Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website
	Mandatory field provided to the ABI for internal use of JANCERTSEARCH. "CB Identity Number" is a unique identification for the CB. The "CB Identity Number" makes it possible to identify which CBs are in the ABI network what data in the register belongs to the CB. When the ABI uploads additional data in the future (i.e. accreditation data) the system will look up the "CB Identity Number" to maintain integrity of data. The "CB Identity Number" can be any alpha numeric number.	Certification Body Name is the Full name of the CB.	Certification Body Acronym	Certification Body website
Mandatory Status	Mandatory	Mandatory	Mandatory	
Correct example	AB01CB00001 AB01CB00002 AB01CB00003	Global Compliance Plus Pty Ltd Many Certification Pty Ltd Canadian Certification Body	GCP MCLP CanCert	http://www.GlobalCompliance.net https://www.ManyCP.com http://www.cancert.com.ca
Do's	Ensure that the Certification Body Identity Number is Unique Ensure that the Certification Body Identity Number is the same in each tab for each Certification Body, if it's not the same the data in the other tabs will not be matched. Ensure that every unique Certification Body Identity Number in other tabs is in its exact format (a mismatch in spaces, capitalization, and others will cause an error and data will not be matched). This cell must be in TEXT format. All cells must be in text format.	Ensure that the Certification Body Name is unique. An Accreditation Body can't have two Certification Bodies with the same name. Ensure the Certification Body name matches the specified Certification Body Identity Number across all tabs, if it's not the same the data in the other tabs will not be matched. It is recommended that Certification Body Name should be in written in English. This cell must be in TEXT format. All cells must be in TEXT format.	It is recommended that Certification Body Acronym should be in written in english. This cell must be in TEXT format. All cells must be in TEXT format.	Use the correct format of the URL at all times. This cell must be in TEXT format. All cells must be in TEXT format. Include http:// or https://
Don't's	Don't use the sample example "UNIQUEID-CB01" create your own ID. Don't leave the Certification Body Identity Number cell blank. Don't merge multiple Certification Body Identity Numbers in one cell. Please make sure that each cell is containing only 1 Certification Body Identity Number to correspond to 1 Certification Body. Don't use 1 Certification Body Identity Number for multiple Certification Body Names.	Do not use 1 Certification Body Name for multiple Certification Body Identity Numbers. Don't leave the Certification Body Name cell blank. Do not merge multiple CB Names in 1 cell.	Do not merge multiple Certification Body Acronyms in 1 cell.	
Incorrect example	UNIQUEID-CB01 [these two cells have been merged, it won't be accepted] UNIQUEID-CB01 [Don't use the sample "UNIQUEID-CB01" create your own] [Don't leave the cell blank] UNIQUEID-CB01, UNIQUEID-CB04 [Don't enter two Certification Body Identity Numbers in one cell]	Global Compliance Plus Pty Ltd [these two cells have been merged, it won't be accepted] [Don't leave the cell blank] Global Compliance Plus Pty Ltd, Many Certification Pty Ltd [Don't enter two Certification Body Names in one cell]	GCP [these two cells have been merged, it won't be accepted] [Don't leave the cell blank] GCP, MCLP, CanCert [Don't enter two Certification Body Acronyms in one cell]	http://www.GlobalCompliance.net [these two cells have been merged, it won't be accepted] http://www.GlobalCompliance.net , https://www.ManyCP.com [Don't enter two Websites in one cell]

The instructions will include a glossary, correct examples, what to do, what not to do, incorrect examples, and suggestions on how to resolve errors for every XML element.

Sample XML

To help you further in populating your data, an XML Sample File can also be downloaded. Only use this sample as a guide and do not use this to upload your data. Use the XML Template to populate your data.

Data Instruction

How to prepare Certification Body Data?

[Excel Data Instruction](#) [XML Data Instruction](#)

Download Data Templates

Upload Certification Body

Excel Template

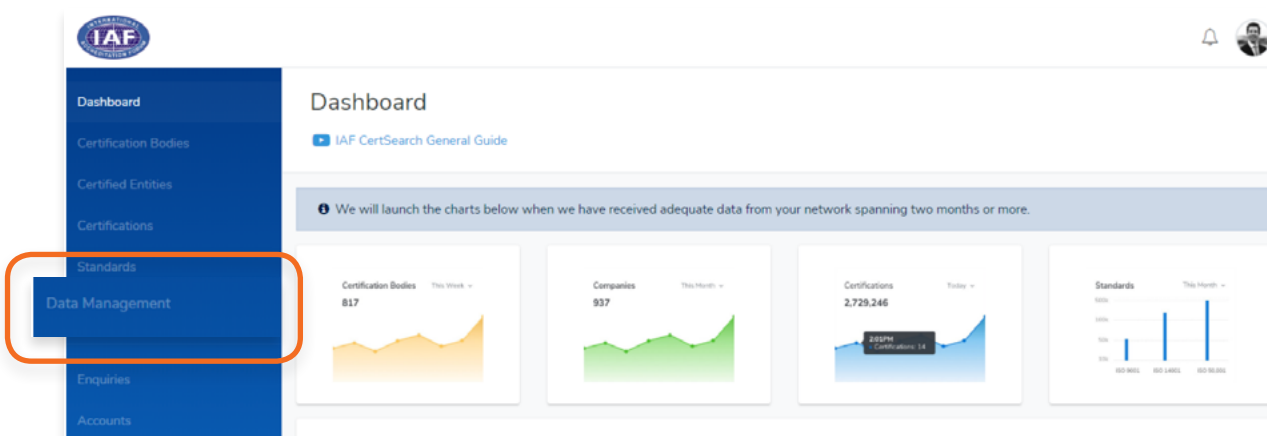
 XML Template

View Samples: [Excel Sample File](#), [XML Sample File](#)

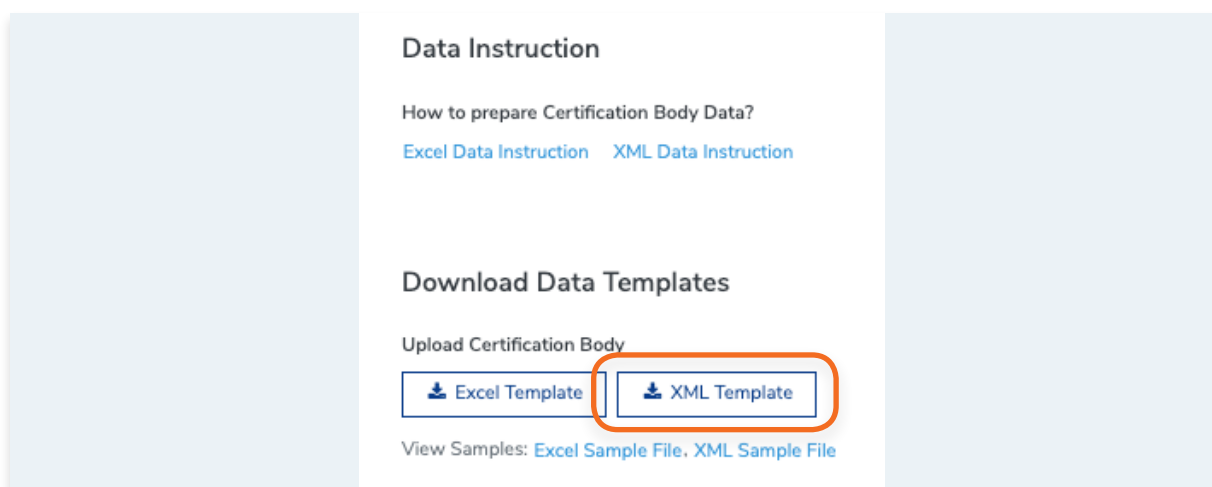
5.5. How to Download Certification Body Data Template in XML

This will show you where to download the Certification Body data template which you will use to populate your data.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **XML Template** under Download Data Templates



3. Once clicked, it will automatically download the XML template.

4. Open the XML Template and populate the data. Make sure that all elements have been

```

▼<ab_cbs>
  ▼<certification_body>
    <certification_body_identity_number>UNIQUEID-CB01</certification_body_identity_number>
    <certification_body_name>Global Compliance Plus Pty Ltd </certification_body_name>
    <certification_body_acronym>GCP</certification_body_acronym>
    <website>www.globalcompliance.test</website>
    <key_contact>Mr Peter Test</key_contact>
    <email_address>info@globalcompliance.test</email_address>
    <phone>+61 2 8453 1100</phone>
    <fax>+61 2 8453 1101</fax>
    <country>Australia</country>
    <description>Description describing the certification body.....</description>
  ▼<office_directories>
    ▼<office_directory>
      <office_type>Head Office</office_type>
      <street>S108/39 E Esplanade</street>
      <city>Manly</city>
      <state>New South Wales</state>
      <country>Australia</country>
      <zip_code>2095</zip_code>
    </office_directory>
    ▼<office_directory>
      <office_type>Branch</office_type>
      <street>54 Test Street</street>
      <city>Avalon</city>
      <state>Northern Territory</state>
      <country>Australia</country>
      <zip_code>2579</zip_code>
    </office_directory>
  </office_directories>
  ▼<standard_and_schemes>
    ▼<standard_and_scheme>
      <scope_type>Management System</scope_type>
      <scheme_name>Quality Management Systems Scheme</scheme_name>
      <standard_code>ISO 9001:2018</standard_code>
      <first_issue_date>20170203</first_issue_date>
      <issue_date>20170203</issue_date>
      <expiry_date>20170203</expiry_date>
    </standard_and_scheme>
    ▼<standard_and_scheme>
      <scope_type>Management System</scope_type>
      <scheme_name>Environmental Management Systems Scheme</scheme_name>
      <standard_code>ISO 14001:2015</standard_code>
      <first_issue_date>20170203</first_issue_date>
      <issue_date>20170203</issue_date>
      <expiry_date>20170203</expiry_date>
  </standard_and_schemes>

```

populated correctly.

5. Save the file

5.6. How to Use the File Upload Section

In this section we have provided video guides, data instructions, sample data, and data templates which you can use when uploading your data by bulk. To prepare, watch the video guides, review the data instructions and view sample files before your create your data templates and upload.

The screenshot shows a web interface for 'Data Management'. At the top, there is a navigation bar with tabs: 'File Upload' (selected), 'FTP Access', 'API Access', 'Data Mapping', 'Field Mapping', and 'Activity'. Below the navigation bar, the main content area is titled 'File Upload'. It contains a brief introduction, a 'Video Guide' section with three columns of video links, a 'Data Instruction' section with links for Excel and XML, and a 'Download Data Templates' section with buttons for 'Excel Template' and 'XML Template'. At the bottom, there are links for 'View Samples: Excel Sample File, XML Sample File'.

Data Management

[File Upload](#) [FTP Access](#) [API Access](#) [Data Mapping](#) [Field Mapping](#) [Activity](#)

File Upload

File Upload is a way to upload data into IAF CertSearch by bulk. An Accreditation Body can upload all data required on its certification bodies or even certifications. A Certification Body can upload all Certification and Certified Entity data. [View File Upload Instruction](#)

Video Guide

- [How to use Data Management](#)

Upload Certification Body Data <ul style="list-style-type: none">How to prepare Excel dataHow to prepare XML dataHow to upload Excel dataHow to upload XML data	Upload Certification Data <ul style="list-style-type: none">How to prepare Excel dataHow to prepare XML dataHow to upload XML data	Solve errors in Data Management <ul style="list-style-type: none">How to use Data MappingHow to use Field MappingHow to resolve errors
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Update/overwrite existing data

- [How to update data](#)

Data Instruction

How to prepare Certification Body Data?

[Excel Data Instruction](#) [XML Data Instruction](#)

Download Data Templates

Upload Certification Body

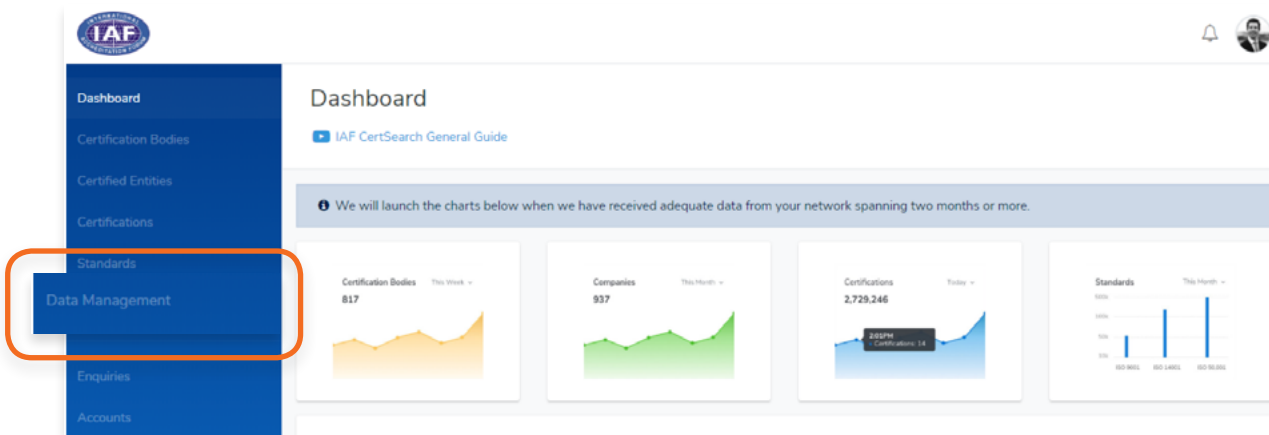
[Excel Template](#) [XML Template](#)

View Samples: [Excel Sample File](#), [XML Sample File](#)

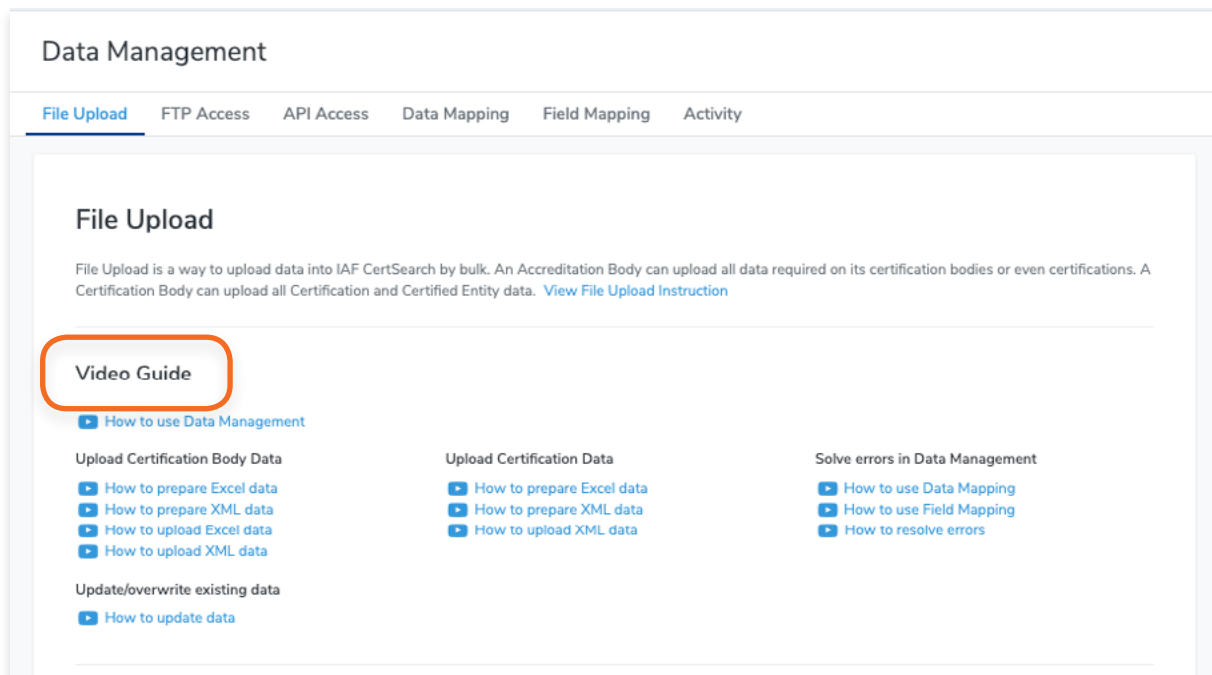
5.6.1. File Upload Video Guides

This will show you where to download the Certification Body data template which you will use to populate your data.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Scroll to the Video Guide section.



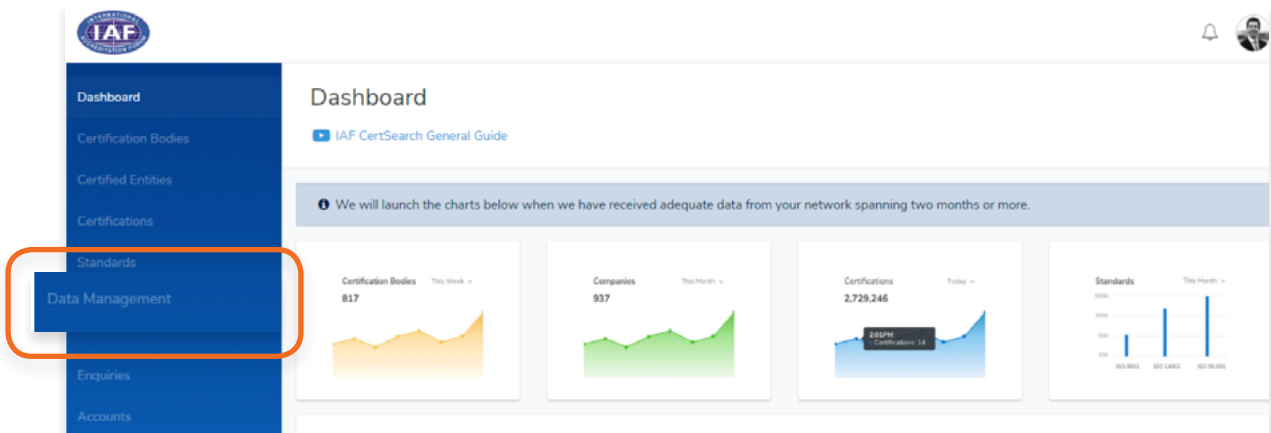
There will be a different video guides in this section that will discuss the overview of data management, preparing and uploading Excel and XML data, solving errors, and updating/overwriting existing data.

5.6.2. How to Upload Certification Body Data in File Upload

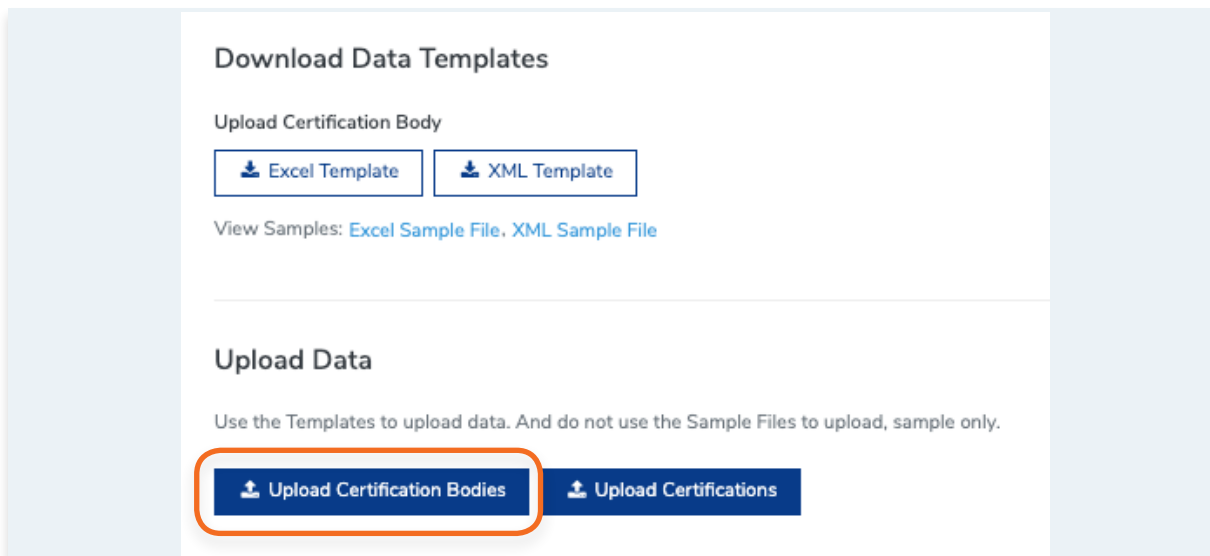
View the step by step guide below or watch the video guide here:

Excel file upload: <https://youtu.be/LT1A4RObqFo>

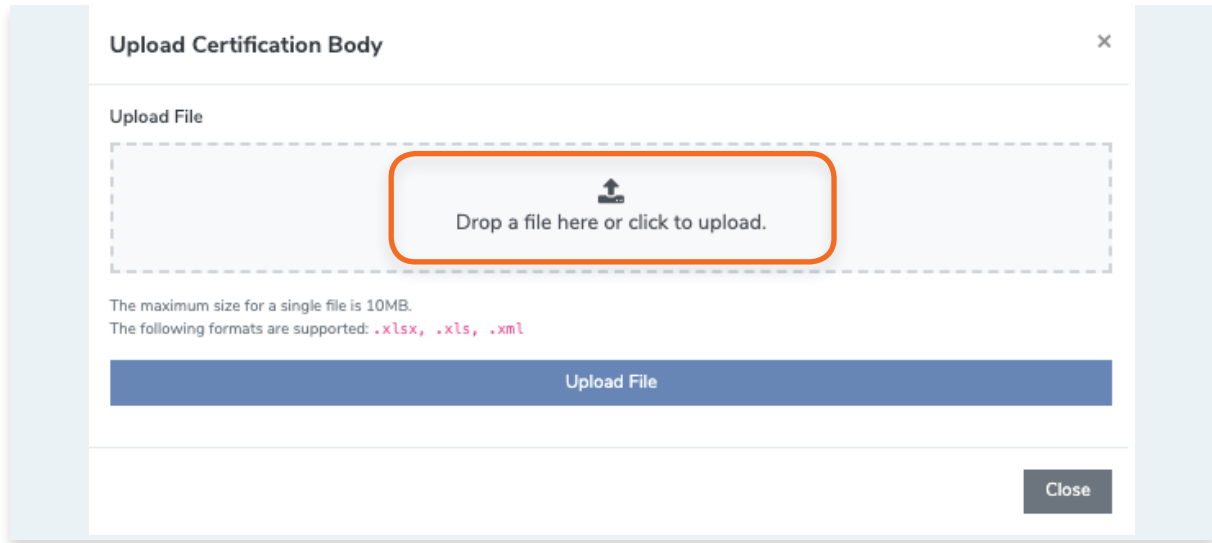
XML file upload: <https://youtu.be/VsHCIQtmfA>



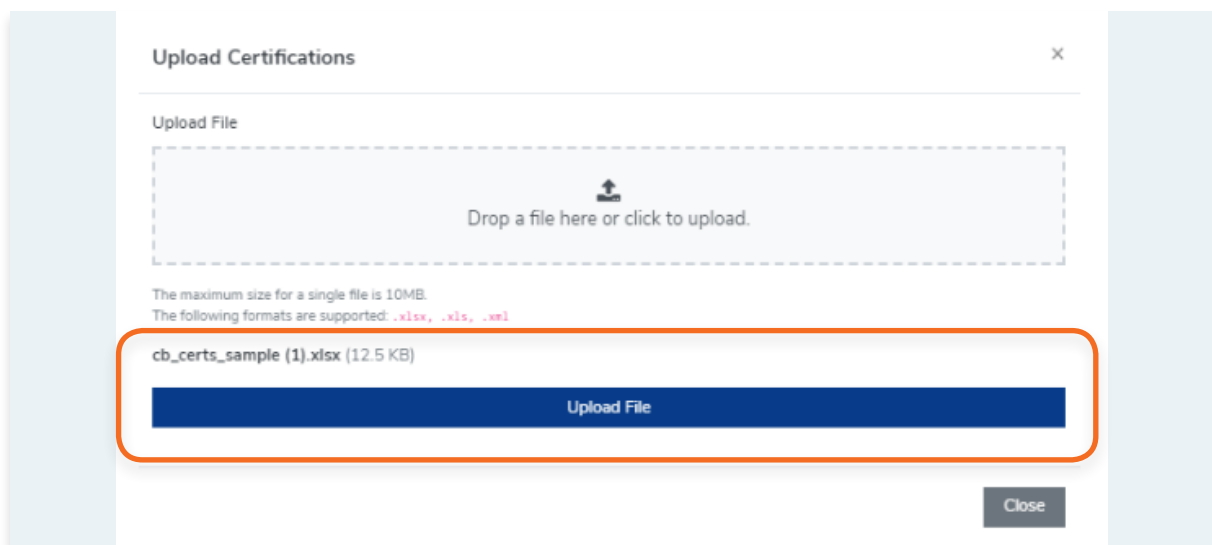
1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Scroll to the bottom of the page and click **Upload Certification Bodies**



3. Drag and drop excel or xml file you wish to upload in the box indicated below or click the box and select the file from your computer.



4. Once file is selected, click Upload File and your data will be uploaded. The maximum size for a single file is 10MB. If you have a file that is larger than 10MB, it is best that you segment your file into smaller file sizes.

5. A pop up will appear to indicate the file was successfully uploaded or not. It is important that you wait for the pop up message. **Do not refresh or leave the page until the pop up confirmation message appears.**

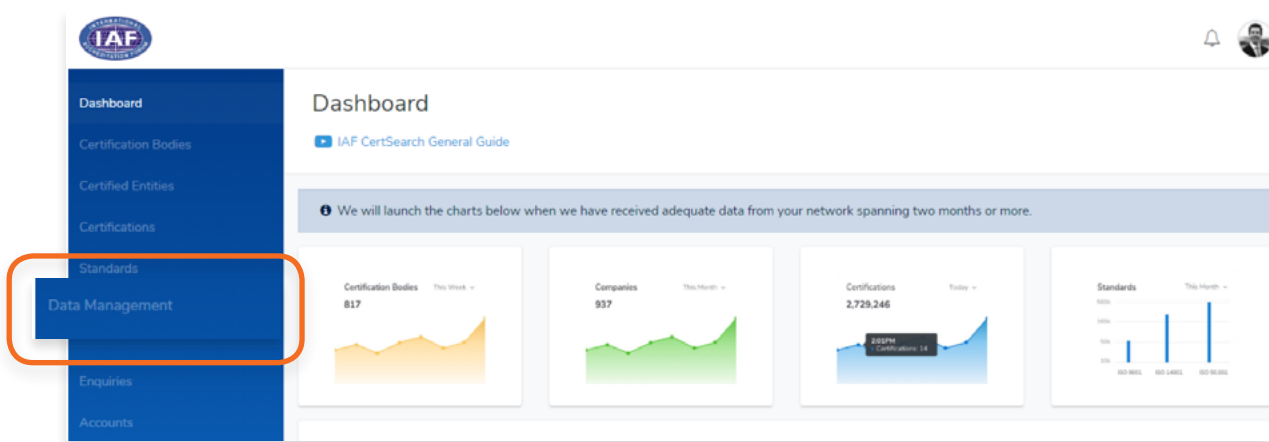
5.6.3. How to Update Certification Body Data with file upload

This is an example of how you can use a file upload to make edits. When you do a file upload it will make any edits that exist in the file. If data in the template is the same as what is already in IAF CertSearch no change will be made.

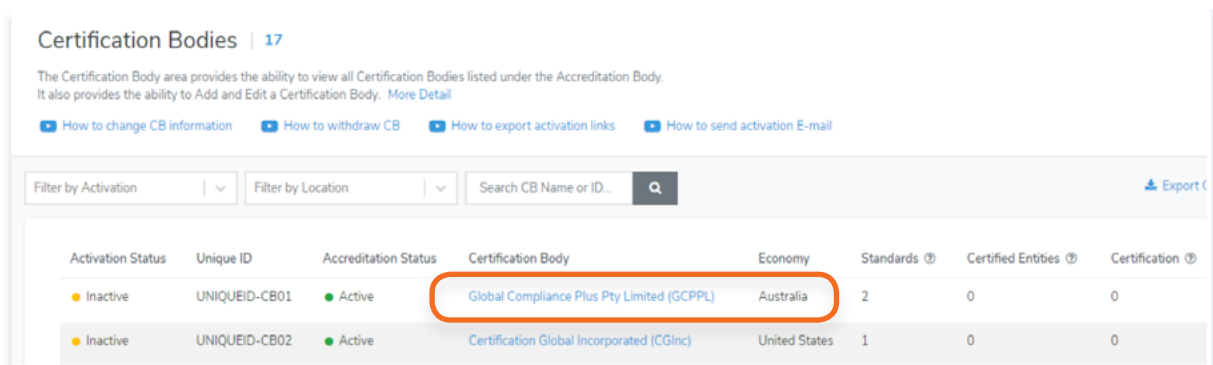
View the example below or watch the video guide here:

https://youtu.be/zIAEur2_U_g

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. For this example, we will update the location of “Global Compliance Plus Pty Limited” from Australia to United States.



Certification Bodies | 17

The Certification Body area provides the ability to view all Certification Bodies listed under the Accreditation Body. It also provides the ability to Add and Edit a Certification Body. [More Detail](#)

[How to change CB information](#) [How to withdraw CB](#) [How to export activation links](#) [How to send activation E-mail](#)

Filter by Activation: [v] Filter by Location: [v] Search CB Name or ID... [Q] [Export](#)

Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification
Inactive	UNIQUEID-CB01	Active	Global Compliance Plus Pty Limited (GCPPL)	Australia	2	0	0
Inactive	UNIQUEID-CB02	Active	Certification Global Incorporated (CGInc)	United States	1	0	0

3. Open the template you used to upload this data.

4. Find the data you wish to update.

In the sample below, we will change the Country/Economy from Australia to United States.

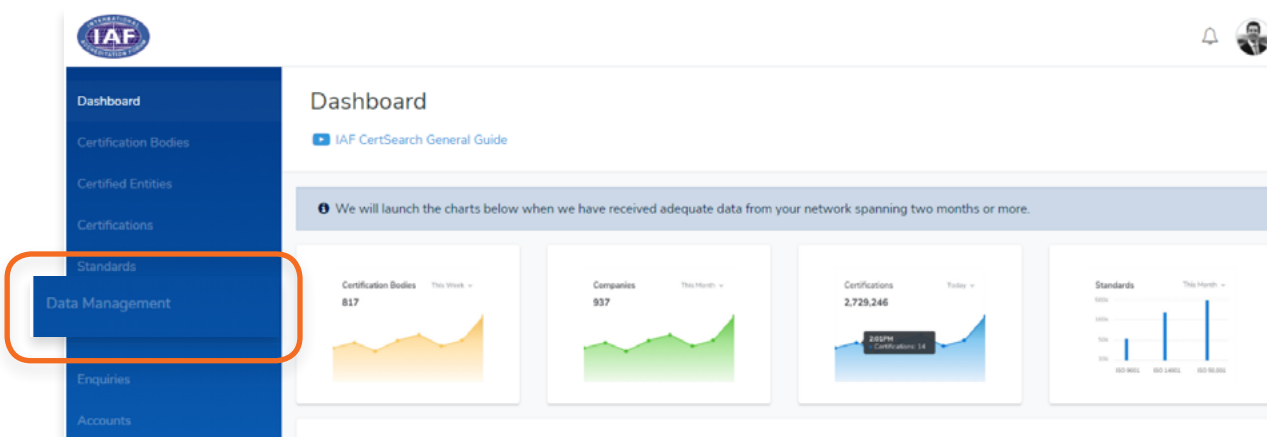
Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address	Phone	Fax	Country/Economy
UNIQUEID-CB01	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test	+61 2 8453 1100	+61 2 8453 1101	Australia
UNIQUEID-CB02	Certification Global Incorporated	CGInc	www.Certificationglobal.test	Mrs Grace Example	grace@certifiedcationglobal.test	+1 4521 6808	+1 4521 6809	United States

Make the changes

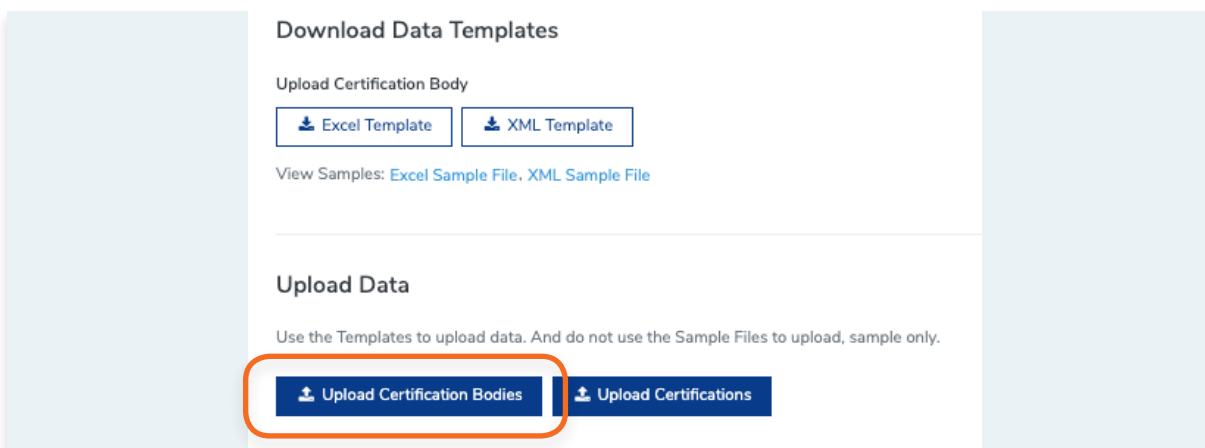
Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address	Phone	Fax	Country/Economy
UNIQUEID-CB01	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test	+61 2 8453 1100	+61 2 8453 1101	United States
UNIQUEID-CB02	Certification Global Incorporated	CGInc	www.Certificationglobal.test	Mrs Grace Example	grace@certifiedcationglobal.test	+1 4521 6808	+1 4521 6809	United States

5. Save the file.

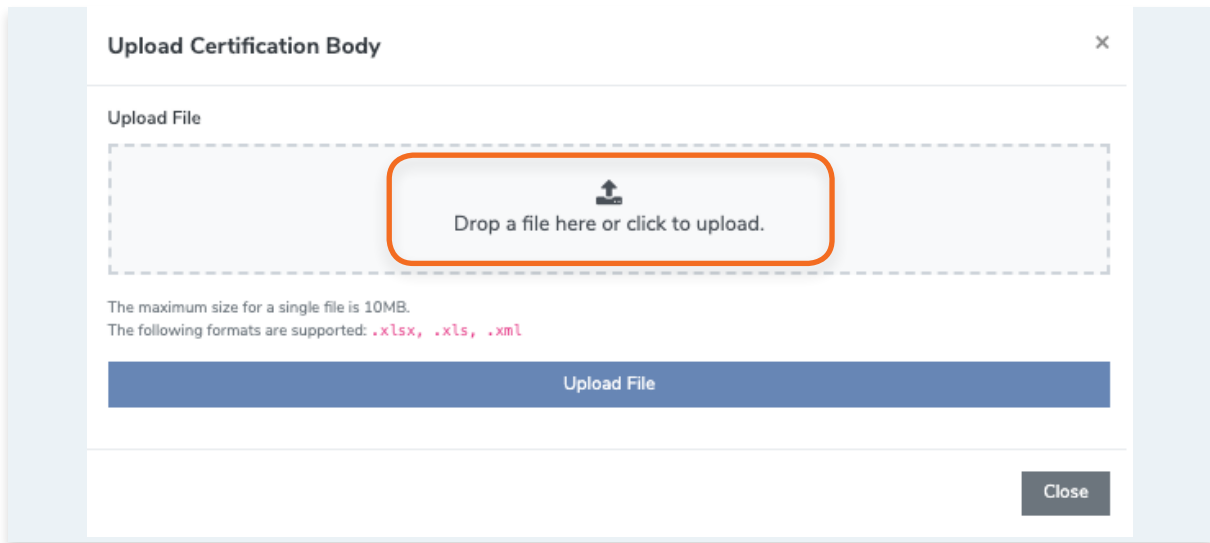
6. From the **Dashboard**, click **Data Management** in the left hand navigation.



7. Scroll to the bottom of the page and click **Upload Certification Bodies**



8. Drag and drop excel or xml file you wish to upload for the update in the box indicated below or click the box to select the file in your computer.



9. Once file is selected, click **Upload File**
10. A pop up will appear to indicate the file was successfully uploaded or not. It is important that you wait for the pop up message. **Do not refresh or leave the page until the pop up confirmation message appears.**
11. Go back to Certification Bodies. You can now see that the Country/Economy has been updated successfully.

The screenshot shows a table titled "Certification Bodies" with 17 items. The table has columns for Activation Status, Unique ID, Accreditation Status, Certification Body, Economy, Standards, Certified Entities, and Certification. The "United States" entry in the Economy column is circled in orange.

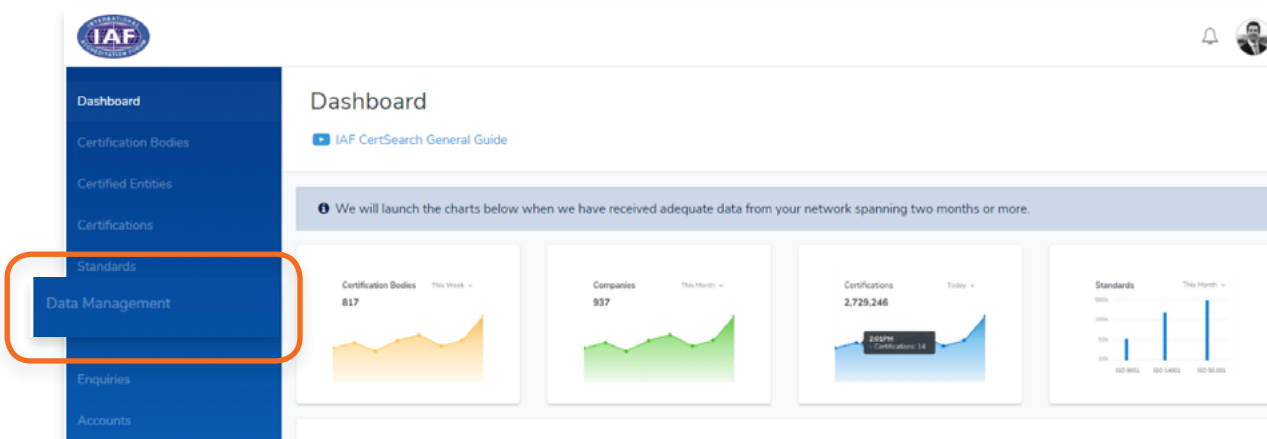
Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified Entities	Certification
Inactive	UNIQUEID-CB01	Active	Global Compliance Plus Pty Limited (GCPL)	United States	2	0	0
Inactive	UNIQUEID-CB02	Active	Certification Global Incorporated (CGInc)	United States	1	0	0

5.7. How to Use the FTP Access Section

In this section we have provided video guides, sample data, and data templates which you can use when uploading your data by bulk via FTP.

FTP provides the ability for IAF CertSearch to upload a new file from the AB nominated server every 24 hours. Any changes to the file will automatically be reflected in IAF CertSearch. ABs should automate a download of the file to their server every 24 hours so no manual handling is required.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **FTP Access** in the menu bar.

The screenshot shows the 'Data Management' section of the application. The title 'Data Management' is at the top. Below it is a horizontal menu bar with several options: File Upload, FTP Access (highlighted with an orange box), API Access, Data Mapping, Field Mapping, and Activity. The main content area below the menu bar is titled 'FTP Access' and contains the following text: 'If you have setup the FTP in IAF CertSearch, then it will be automatically downloaded/fetched by IAF CertSearch FTP Crawler and looking for the nominated file according to account type. [View FTP Access Instructions](#)'

5.7.1. How to upload file using FTP

View the step by step guide below or watch the video guide here:

How to upload an Excel File using FTP:

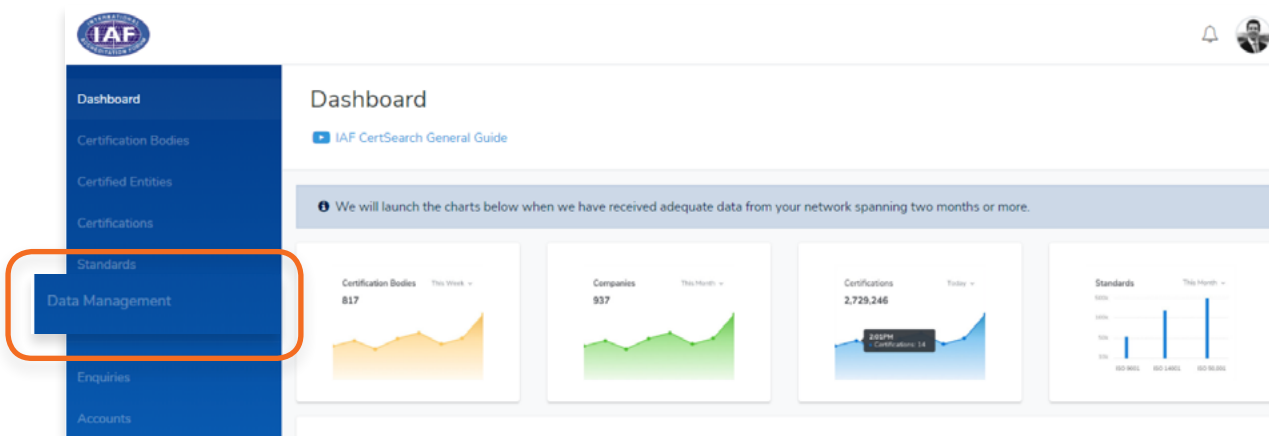
<https://youtu.be/YROPwzkMxzc>

How to upload a XML File using FTP:

<https://youtu.be/VxvOMbyAEkI>

This allows you to upload data in bulk from your server every 24 hours. This works for both Excel and XML formats.

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click FTP Access in the menu bar.

The screenshot shows the 'Data Management' page. At the top, the title 'Data Management' is displayed. Below it is a horizontal menu bar with several options: File Upload, FTP Access (highlighted with an orange box), API Access, Data Mapping, Field Mapping, and Activity. The main content area below the menu bar is titled 'FTP Access' and contains the following text: 'If you have setup the FTP in IAF CertSearch, then it will be automatically downloaded/fetched by IAF CertSearch FTP Crawler and looking for the nominated file according to account type. [View FTP Access Instructions](#)'

3. Download the Excel Template

You will need to ensure that your file on your FTP server matches the format of this template including sheet sequence, column sequence and row sequence. You can use Field Mapping if required.



4. Scroll to the File Names Section. Make sure that your file names matches the file names indicated in this section.

You can only use the file names and file extensions indicated below:

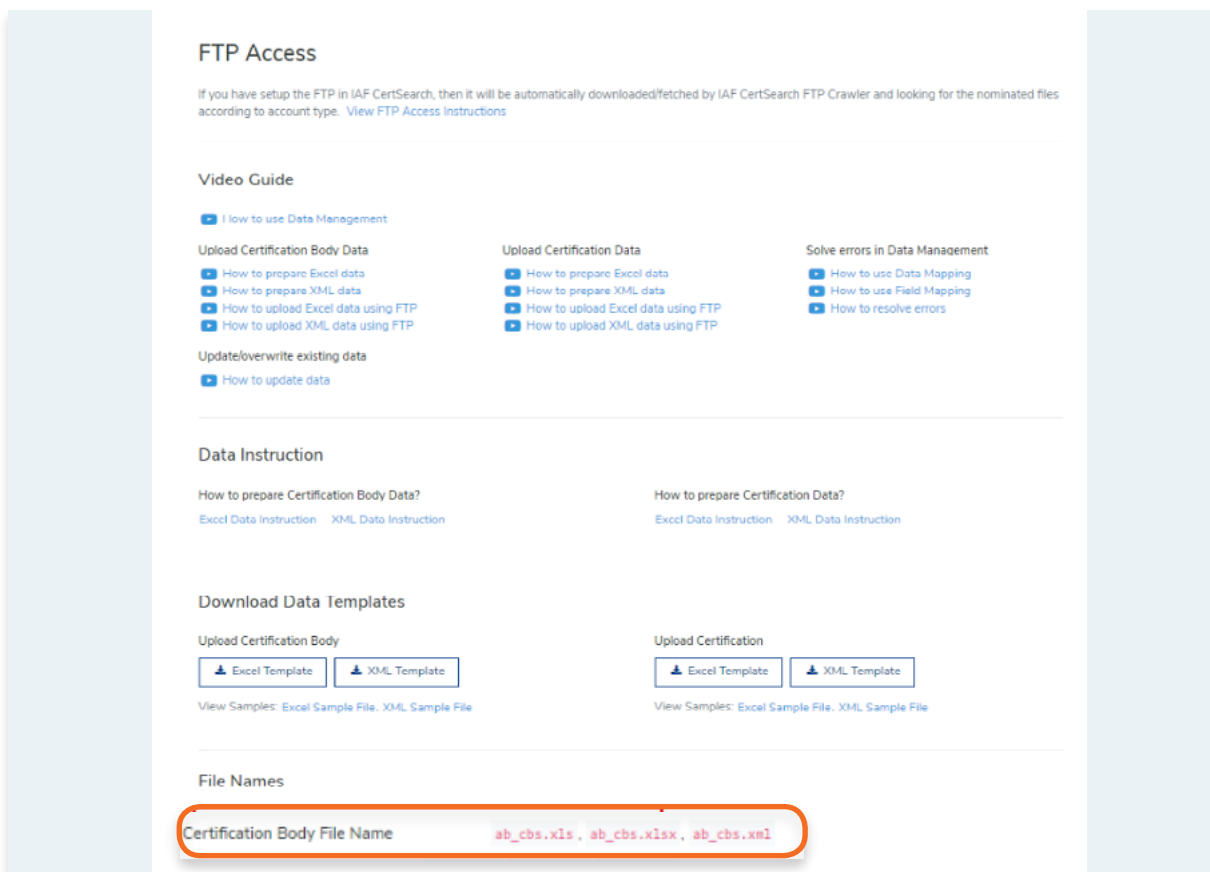
ab_cbs.xls (Excel format)

ab_cbs.xlsx (Excel format)

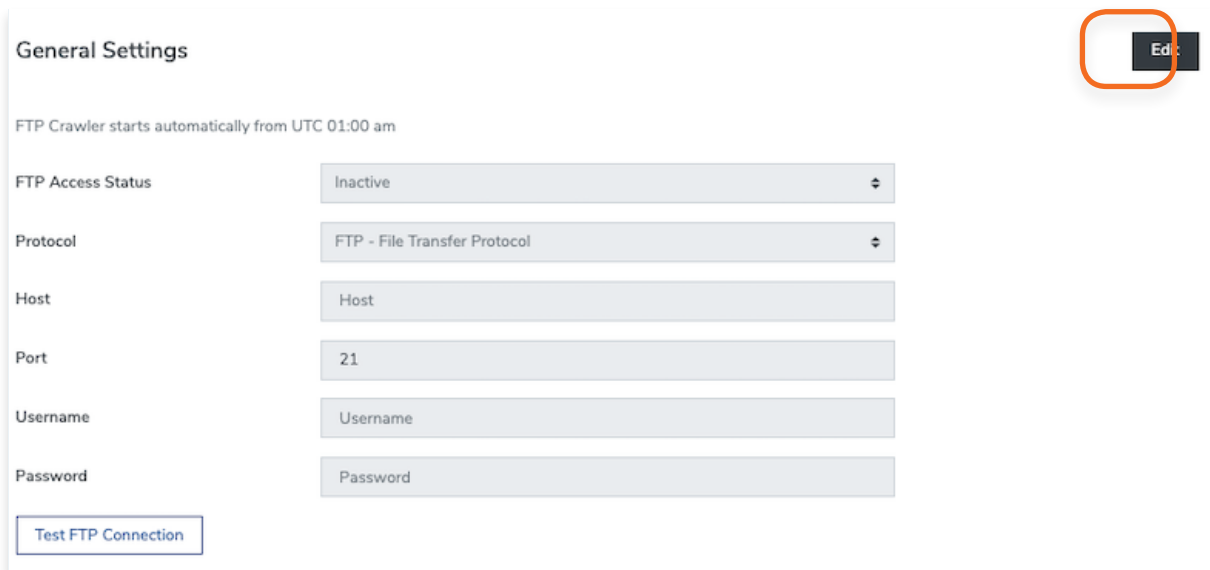
ab_cbs.xml (XML format)

If the file names do not match, the system will not upload the file.

5. Please note : in the FTP process the file size can't be greater than 40MB. If the file size is greater than 40MB in xml, additional files can be created by numbering. i.e cb_certs_1.xml, cb_certs_2.xml etc cb_certs_1 ~ 10.xml . If you use excel and your file is greater than 40 MB you will need to change to xml and create multiple files as above.

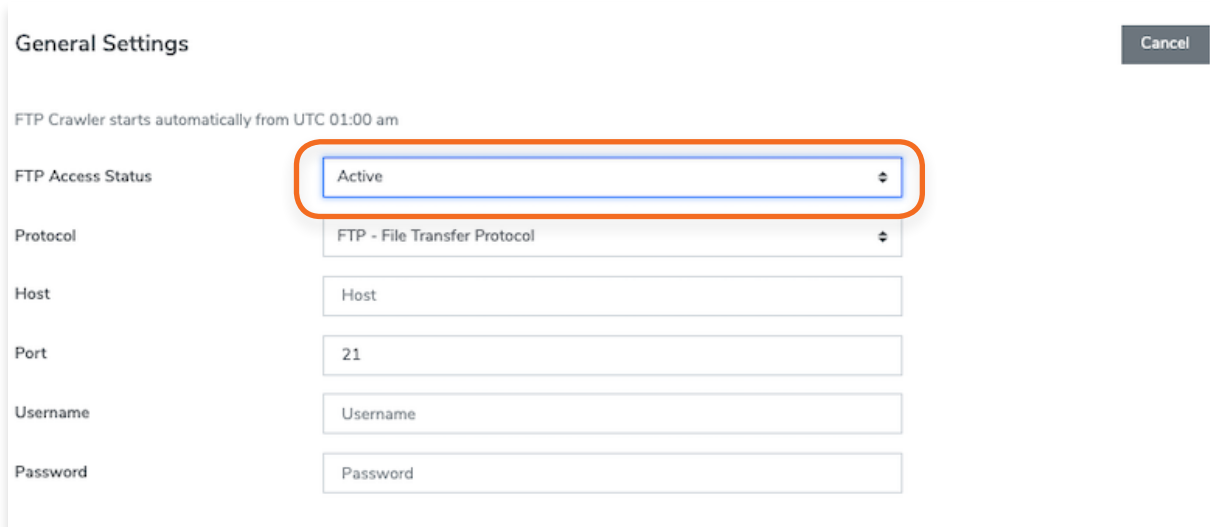


6. Scroll to General Settings and click **Edit**.



The screenshot shows a 'General Settings' form. At the top right, there is a dark grey button labeled 'Edit' which is circled in orange. Below the title, a note states 'FTP Crawler starts automatically from UTC 01:00 am'. The form contains several fields: 'FTP Access Status' (dropdown menu showing 'Inactive'), 'Protocol' (dropdown menu showing 'FTP - File Transfer Protocol'), 'Host' (text input field with 'Host'), 'Port' (text input field with '21'), 'Username' (text input field with 'Username'), and 'Password' (text input field with 'Password'). At the bottom left, there is a button labeled 'Test FTP Connection'.

7. Change the FTP Access Status to Active.



The screenshot shows the same 'General Settings' form as in step 6. In this step, the 'FTP Access Status' dropdown menu is highlighted with an orange border and shows 'Active' selected. At the top right, there is a dark grey button labeled 'Cancel'. The other fields remain the same as in the previous screenshot.

8. Select the Protocol and enter your Host, Port detail, Username and Password. Click **Save changes**

The screenshot shows a 'General Settings' form with a 'Cancel' button in the top right. Below the title, it states 'FTP Crawler starts automatically from UTC 01:00 am'. The form contains several fields: 'FTP Access Status' (Active), 'Protocol' (FTP - File Transfer Protocol), 'Host' (54.153.170.117), 'Port' (21), 'Username' (sftpuser), and 'Password' (masked with dots). A blue 'Save changes' button is at the bottom. An orange box highlights the Protocol, Host, Port, Username, and Password fields.

9. Test your FTP connection. Click **Test FTP Connection**

This screenshot shows the same 'General Settings' form, but the 'FTP Access Status' is now 'Inactive'. The 'Host', 'Port', 'Username', and 'Password' fields are empty. An 'Edit' button is in the top right. A blue 'Test FTP Connection' button is at the bottom left, highlighted with an orange box.

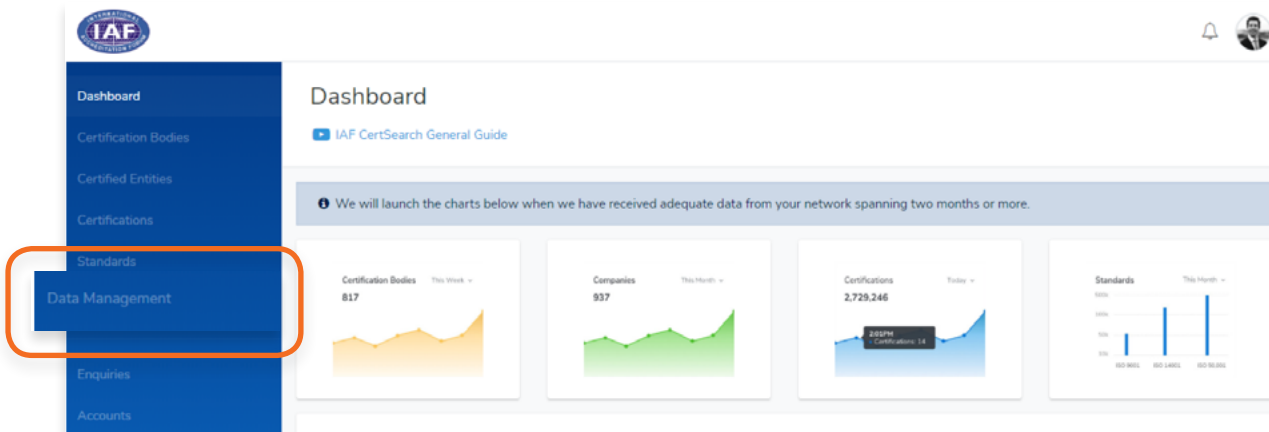
10. A pop up will appear indicating that the connection was successful.
11. Go to your FTP server and download the file to your server and it will be uploaded.
Any changes made to your file will be updated every 24 hours.

5.8. How to Use the API Access Section

View the step by step guide below or watch the video guide here:

<https://youtu.be/xBHnXGuYzZw>

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **API Access** in the menu bar.

Data Management

File Upload FTP Access **API Access** Data Mapping Field Mapping Activity

API Access

These instructions describe how to upload IAF CertSearch data using curl calls. [View API Access Instructions](#)

Video Guide

- [How to use Data Management](#)

Upload Data using API Access

- [How to use API Access](#)

Solve errors in Data Management

- [How to use Data Mapping](#)
- [How to use Field Mapping](#)
- [How to resolve errors](#)

Update/overwrite existing data

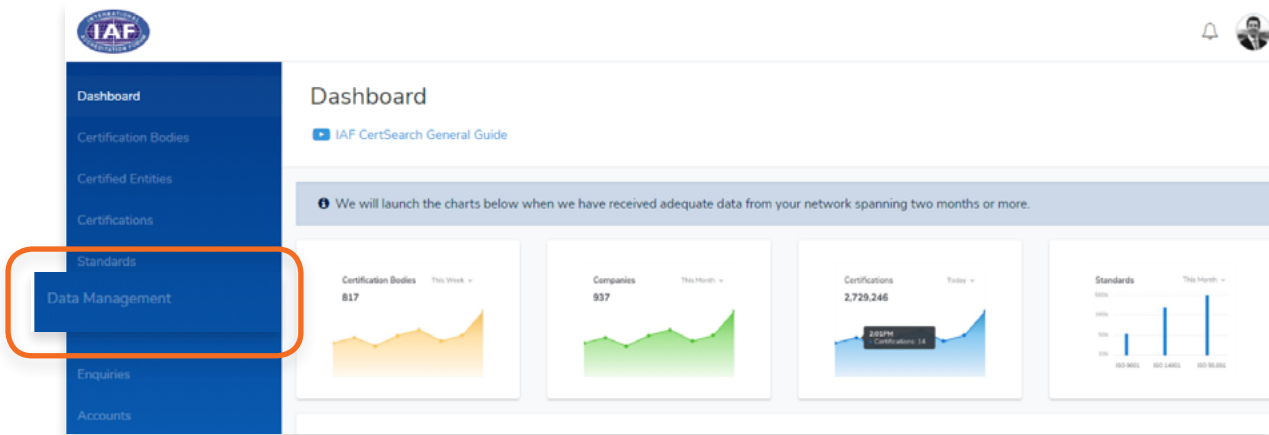
- [How to update data](#)

[+ New API Key](#)

API Key Permissions

5.8.1. How to View API Access Instructions

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Click **API Access** in the menu bar.

The screenshot shows the 'Data Management' page. The title is 'Data Management'. Below the title is a horizontal menu with the following items: File Upload, FTP Access, API Access (highlighted with an orange box), Data Mapping, Field Mapping, and Activity. The main content area is titled 'API Access' and contains the text: 'These instructions describe how to upload IAF CertSearch data using curl calls. [View API Access Instructions](#)'. Below this is a 'Video Guide' section with a play button icon and the text 'How to use Data Management'. At the bottom of the page are three buttons: 'Upload Data using API Access', 'Solve errors in Data Management', and 'Update/overwrite existing data'.

3. Click **View API Access Instructions**

The screenshot shows the 'Data Management' page, similar to the previous one. The title is 'Data Management'. Below the title is a horizontal menu with the following items: File Upload, FTP Access, API Access (underlined), Data Mapping, Field Mapping, and Activity. The main content area is titled 'API Access' and contains the text: 'These instructions describe how to upload IAF CertSearch data using curl calls. [View API Access Instructions](#)' (highlighted with an orange box). Below this is a 'Video Guide' section with a play button icon and the text 'How to use Data Management'. At the bottom of the page are three buttons: 'Upload Data using API Access', 'Solve errors in Data Management', and 'Update/overwrite existing data'.

4. Read the API Access Instructions documentation.

The documentation provides clear instructions on how to establish the API.

[Back to Home](#)

Getting Started with API Access

There are several ways you can get started with the IAFCertSearch API.

Prerequisites

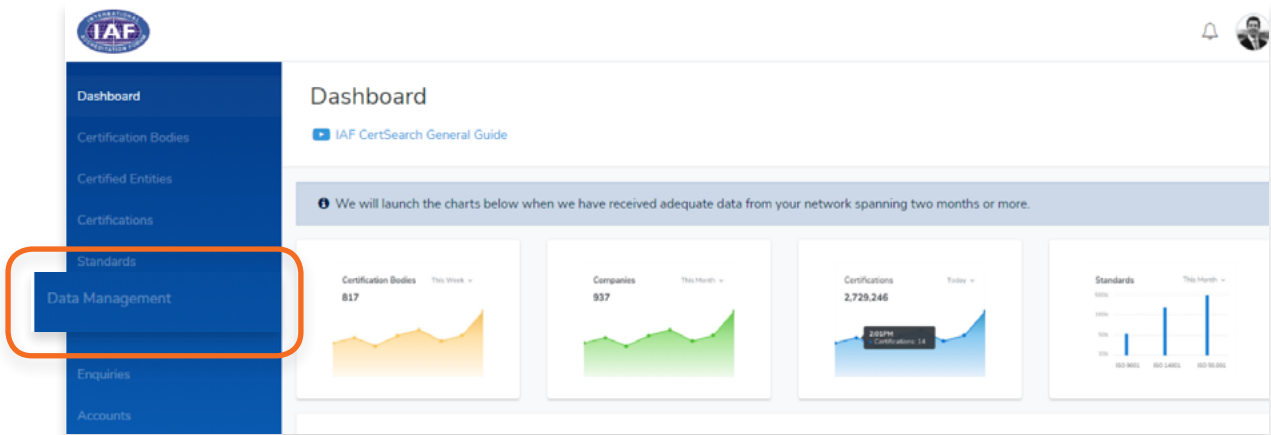
These instructions describe how to send your first email using curl calls. This is one of many ways to send an email with the IAF CertSearch API - we also have PHP, Python, Node.js, Java, C#, Go, and Ruby libraries.

Before you can start using the API, you need to do the following:

- Create/Activate an IAF CertSearch account.
- Create an API Key.
- Make sure you have curl installed on your machine.

5.8.2. How to Generate a new API key

1. From the **Dashboard**, click **Data Management** in the left hand navigation.

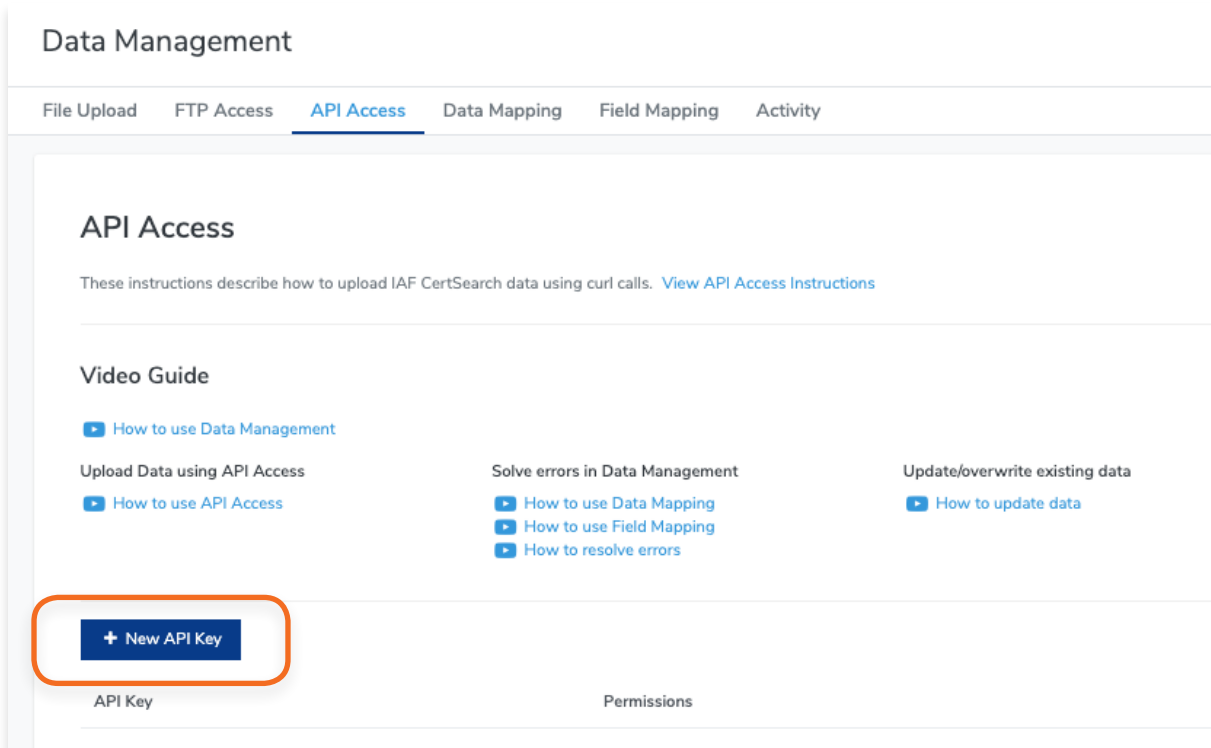


2. Click **API Access** in the menu bar.

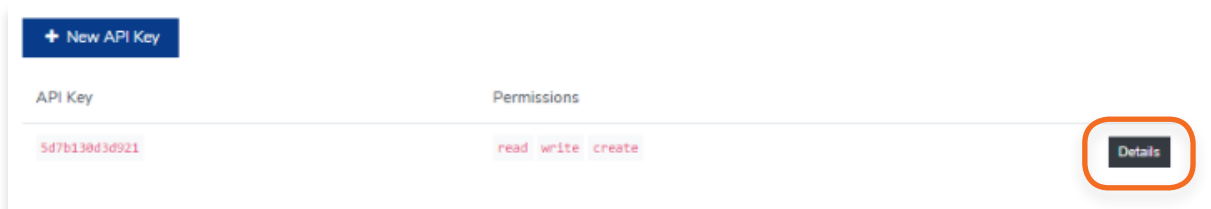
The screenshot shows the "Data Management" page. The navigation bar includes: File Upload, FTP Access, **API Access** (highlighted with an orange box), Data Mapping, Field Mapping, and Activity. The main content area is titled "API Access" and contains the following sections:

- Instructions: "These instructions describe how to upload IAF CertSearch data using curl calls. [View API Access Instructions](#)"
- Video Guide:
 - [How to use Data Management](#)
 - Upload Data using API Access:
 - [How to use API Access](#)
 - Solve errors in Data Management:
 - [How to use Data Mapping](#)
 - [How to use Field Mapping](#)
 - [How to resolve errors](#)
 - Update/overwrite existing data:
 - [How to update data](#)
- [+ New API Key](#) button
- Table headers: API Key, Permissions

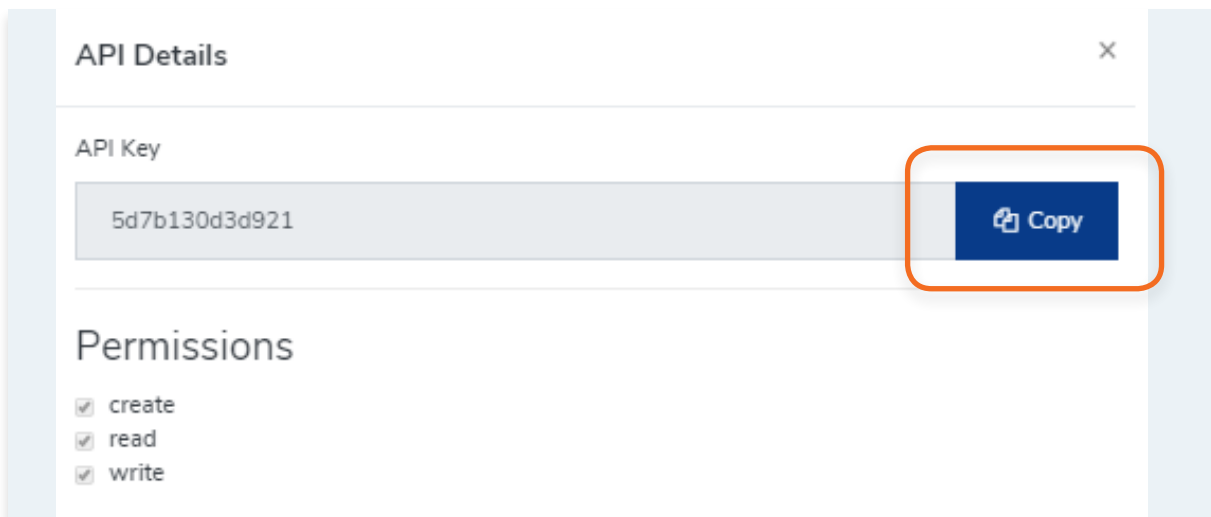
3. Click **View API Access Instructions**



4. The API key will be generated. Click **Details**



5. Copy the API Key.



5.9. How to Use Data Mapping

View the step by step guide below or watch the video guide here:

<https://youtu.be/cAG6Lc4LjtU>

Data mapping is needed when the values in your data are different from the values in the IAF CertSearch. Mapping allows the values in your database to match the values in IAF CertSearch without editing your data values.

1. Open your file.

We will be using a sample data for this demonstration.

You will see that the Country value in this CB's data is "USA"

Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address	Phone	Fax	Country/Economy
UNIQUEID-CB01	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test	+61 2 8453 1100	+61 2 8453 1101	USA
UNIQUEID-CB02	Certification Global Incorporated	CGInc	www.Certificationglobal.test	Mrs Grace Example	grace@certificationglobal.test	+1 4521 6808	+1 4521 6809	USA


2. Go to **Data Management** to upload the file.

Upload Data

Use the Templates to upload data. And do not use the Sample Files to upload, sample only.

[Upload Certification Bodies](#) [Upload Certifications](#)

3. A message will appear saying **"Resolve Errors"**.



Resolve Errors

Resolve errors detailed in "File Upload Activities" and re-upload your file.

[Close](#)

- Go to File Upload Activities under the Upload Certification Body button. You will see 2 errors found in the Activity log.

Upload Data
Use the Templates to upload data. And do not use the Sample Files to upload, sample only.

[Upload Certification Bodies](#)

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
● Error	File Upload	Excel	Certification Body	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-17 11:57:09	View

- Click **View**
- Study the errors.**

For the sample, the error is the country value "USA". **It suggests that Data Mapping is required to resolve the requests.**

Activity Details

Activity: File Upload
File Type: Excel
Uploaded at: 2019-09-17 11:57:09

Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification Bodies	Country/Economy	2	USA	Country mapping required	Go to Data Mapping and resolve requests.
Certification Bodies	Country/Economy	3	USA	Country mapping required	Go to Data Mapping and resolve requests.

- In the suggestion column, click Data Mapping

Activity Details

Activity: File Upload
File Type: Excel
Uploaded at: 2019-09-17 11:57:09

Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification Bodies	Country/Economy	2	USA	Country mapping required	Go to Data Mapping and resolve requests.
Certification Bodies	Country/Economy	3	USA	Country mapping required	Go to Data Mapping and resolve requests.

8. In Data Mapping, you will see that there is no match for “usa”.

Data Mapping

Data mapping provides the ability for your organisation to map the data values from your system to the data values in IAF CertSearch so that they can be uploaded. [View Data Mapping Instructions](#)

Video Guide

[How to use Data Mapping](#)

All Mappings Country Document Standard

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created at	Actions
<input type="checkbox"/>	Country	Inactive	usa		2019-09-13	Actions

9. Click the **Actions** button and select **View Details**

Data Mapping

Data mapping provides the ability for your organisation to map the data values from your system to the data values in IAF CertSearch so that they can be uploaded. [View Data Mapping Instructions](#)

Video Guide

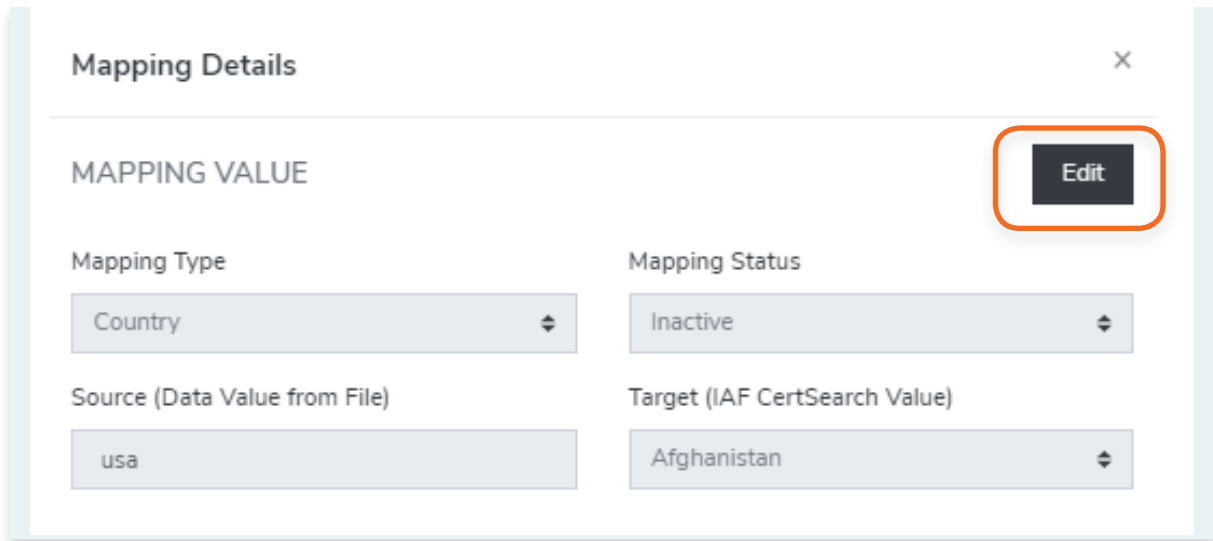
[How to use Data Mapping](#)

All Mappings Country Document Standard

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created at	Actions
<input type="checkbox"/>	Country	Inactive	usa		2019-09-13	Actions

- View Details
- Delete Mapping

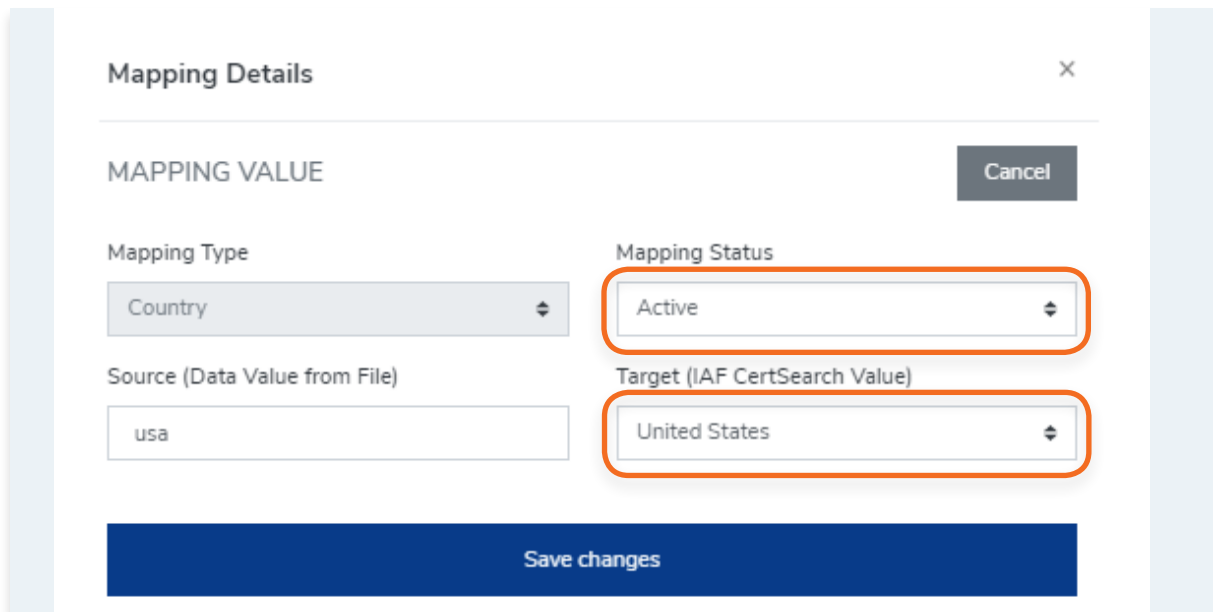
10. Click Edit



The screenshot shows a 'Mapping Details' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'MAPPING VALUE' section. To the right of this section is a dark button labeled 'Edit', which is highlighted with an orange border. Below this, there are four dropdown menus arranged in a 2x2 grid:

- Mapping Type: Country
- Mapping Status: Inactive
- Source (Data Value from File): usa
- Target (IAF CertSearch Value): Afghanistan

11. Change the Mapping Status to Active and Make sure that the correct target is selected. In our sample, it should be "United States".



The screenshot shows the 'Mapping Details' dialog box after modifications. A 'Cancel' button is now visible in the top right. The 'Mapping Status' dropdown is set to 'Active' and the 'Target (IAF CertSearch Value)' dropdown is set to 'United States'. Both of these dropdowns are highlighted with orange borders. At the bottom of the dialog is a large blue button labeled 'Save changes'.

12. Click **Save changes**

13. Reupload the file again.

Reuploading our sample file will now map the value "USA" to "United States".

Once Data Mapping is setup, it will work for all future uploads. They only need to be created once.

14. Go back to File Upload Activities.

For this sample you will see that the upload was successful with no errors.

Status	Activity	File Format	File	Details	Uploaded at	Actions
Success	File Upload	Excel	Certification Body	Excel file has been uploaded.	2019-09-17 12:05:23	
Error	File Upload	Excel	Certification Body	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-17 11:57:09	View

Go to Certification Bodies. the values for “USA” will appear as “United States” indicating that the data mapping for this sample is also successful.

Activation Status	Unique ID	Accreditation Status	Certification Body	Economy	Standards	Certified E
Inactive	UNIQUEID-CB01	Active	Global Compliance Plus Pty Limited (GCPPL)	United States	2	0
Inactive	UNIQUEID-CB02	Active	Certification Global Incorporated (CGInc)	United States	1	0

5.10. How to Use Field Mapping

View the step by step guide below or watch the video guide here:

<https://youtu.be/VuHkQQ5njBQ>

Field Mapping is needed when the field in the CB file are different from the fields in the IAF CertSearch. You can choose to change the field in your database or map the fields via field mapping to those in IAF CertSearch.

1. Open the template.

The field values in IAF CertSearch are "Certification Body Name" and "Certification Body Acronym".

In CB sample file, the values in the file are "CB Name" and "CB Acronym"

Certification Body Identity Number	CB Name	CB Acronym	Website	Key Contact	Email Address
UNIQUEID-CB01	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test
UNIQUEID-CB02	Certification Global Incorporated	CGInc	www.Certificationglobal.test	Mrs Grace Example	grace@certifiedcationglobal.test

2. Go to **Data Management** to upload the file.

The screenshot shows a web interface with two main sections: "Download Data Templates" and "Upload Data".

Download Data Templates

Upload Certification Body

[Excel Template](#) [XML Template](#)

View Samples: [Excel Sample File](#), [XML Sample File](#)

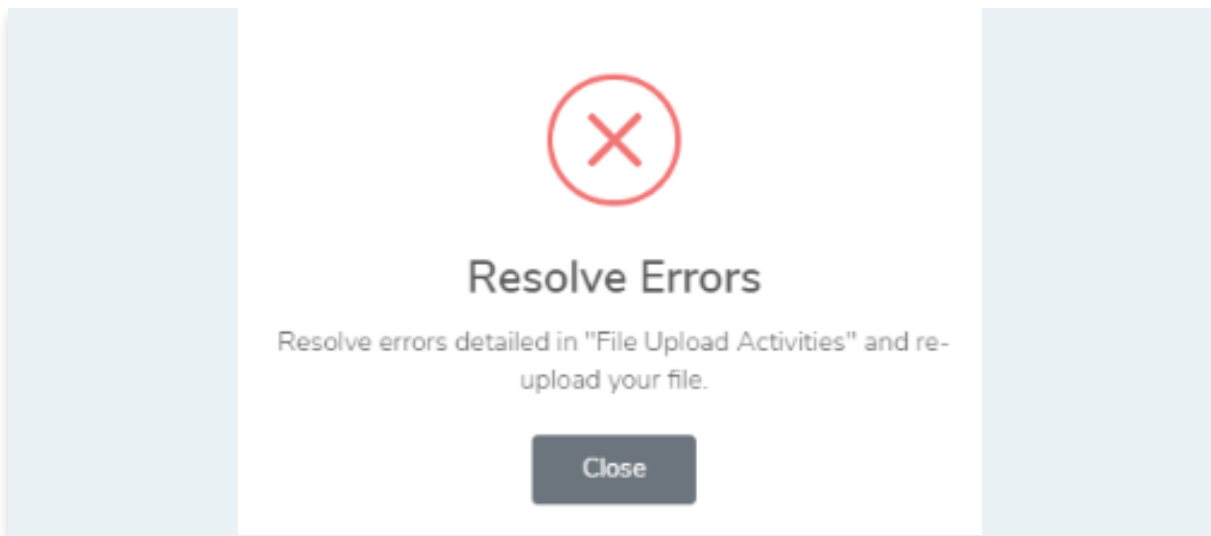
Upload Data

Use the Templates to upload data. And do not use the Sample Files to upload, sample only.

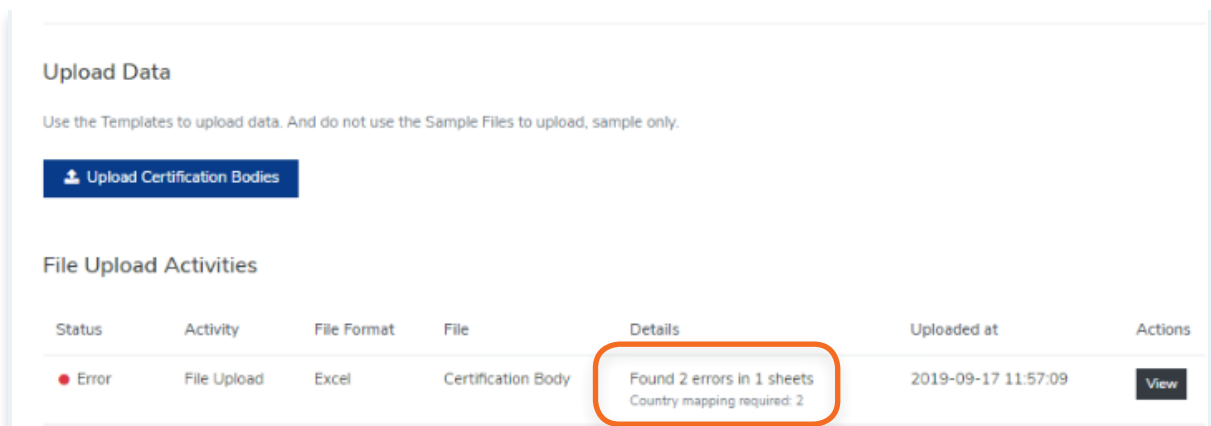
[Upload Certification Bodies](#) [Upload Certifications](#)

The "Upload Certification Bodies" button is highlighted with an orange circle.

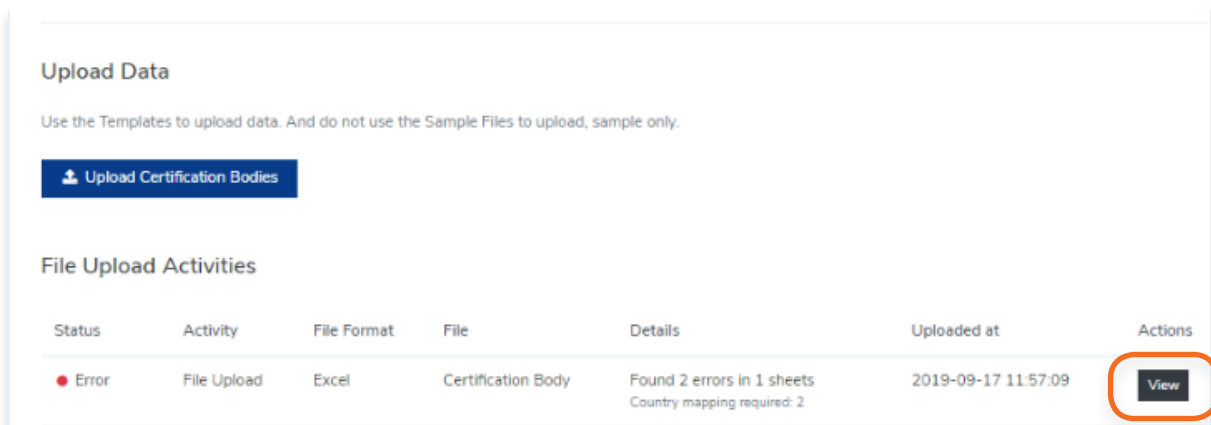
3. A message will appear saying "Resolve Errors".



4. Go to **File Upload Activities** under the Upload Certification Body button. You will see 2 errors found in the Activity log.



5. Click **View**



6. Study the errors.

For the sample, the error is the field value "Cb Name" and "Cb Acronym". It suggests that Field Mapping is required to resolve the requests.

Activity Details x

Activity: File Upload
 File Type: Excel
 Uploaded at: 2019-09-17 12:14:11

Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification Bodies	Cb Name	0		Field mapping required	Go to Field Mapping and resolve requests.
Certification Bodies	Cb Acronym	0		Field mapping required	Go to Field Mapping and resolve requests.

7. In the Suggestion column, click **Field Mapping**

Activity Details x

Activity: File Upload
 File Type: Excel
 Uploaded at: 2019-09-17 12:14:11

Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification Bodies	Cb Name	0		Field mapping required	Go to Field Mapping and resolve requests.
Certification Bodies	Cb Acronym	0		Field mapping required	Go to Field Mapping and resolve requests.

8. In Field Mapping, you will see that there is no match for "cb name" and "cb acronym".

Field Mapping

Video Guide
[How to use Field Mapping](#)

[Delete](#)

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created At	Actions
<input type="checkbox"/>	Field Name	Inactive	cb acronym		2019-09-17	Actions
<input type="checkbox"/>	Field Name	Inactive	cb name		2019-09-17	Actions

9. Click **Actions** on one of the errors and select **View Details**

The screenshot shows a table titled "Field Mapping" with a "Video Guide" section above it. The table has columns for "Select", "Mapping Type", "Status", "Source (Data Value from File)", "Target (IAF CertSearch Value)", "Created At", and "Actions". There are two rows of data. The first row has "Field Name" as the mapping type, "Inactive" status, and "cb acronym" as the source. The "Actions" column for this row is open, showing "View Details" and "Delete Mapping" options. A "Delete" button is also visible in the top right corner of the table area.

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created At	Actions
<input type="checkbox"/>	Field Name	Inactive	cb acronym		2019-09-17	Actions ▾ View Details Delete Mapping
<input type="checkbox"/>	Field Name	Inactive	cb name		20	

10. Click **Edit**.

The screenshot shows the "Mapping Details" dialog box. It has a title bar with a close button (X). Below the title is a "MAPPING VALUE" section with an "Edit" button highlighted in an orange box. The dialog contains several fields: "Mapping Type" (Field Name), "Mapping Status" (Inactive), "Source (Data Value from File)" (cb acronym), and "Target (IAF CertSearch Value)" (Select or Search by Name).

11. Change the Mapping Status to Active and Make sure that the correct target is selected. In our sample, it should be "Certification Body Acronym".

The screenshot shows the "Mapping Details" dialog box after updates. The "Mapping Status" is now "Active" and the "Target (IAF CertSearch Value)" is "Certification Body Acronym", both highlighted in orange boxes. A "Cancel" button is visible in the top right, and a "Save changes" button is at the bottom.

12. Click **Save changes**

13. Repeat steps 9 - 12 for all other remaining inactive Field Mappings.

Field Mapping

Video Guide

[How to use Field Mapping](#)

[Delete](#)

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created At	Actions
<input type="checkbox"/>	Field Name	Active	cb acronym	Certification Body Acronym	2019-09-17	Actions
<input type="checkbox"/>	Field Name	Inactive	cb name		2019-09-17	Actions

14. Reupload the file again.

15. Go back to File Upload Activities and you will see that the upload is now successful and Field Mapping is now mapped correctly.

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
Success	File Upload	Excel	Certification Body	Excel file has been uploaded.	2019-09-17 12:26:35	
Error	File Upload	Excel	Certification Body	Found 2 errors in 1 sheets Field mapping required: 2	2019-09-17 12:14:11	View

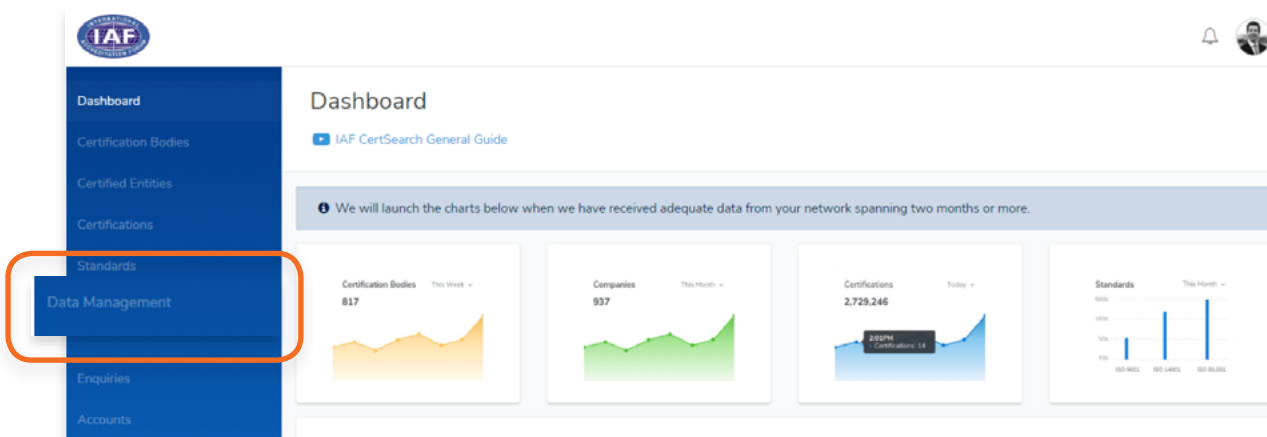
5.11. How to Resolve Errors

Do not be alarmed if you receive an error. It does not mean that IAF CertSearch is not working, it just means there are data errors which need to be resolved so the data can be accepted. IAF Certsearch will pinpoint where the errors are so you can easily resolve.

View the step by step guide below or watch the video guide here:

<https://youtu.be/LT1A4RObqFo>

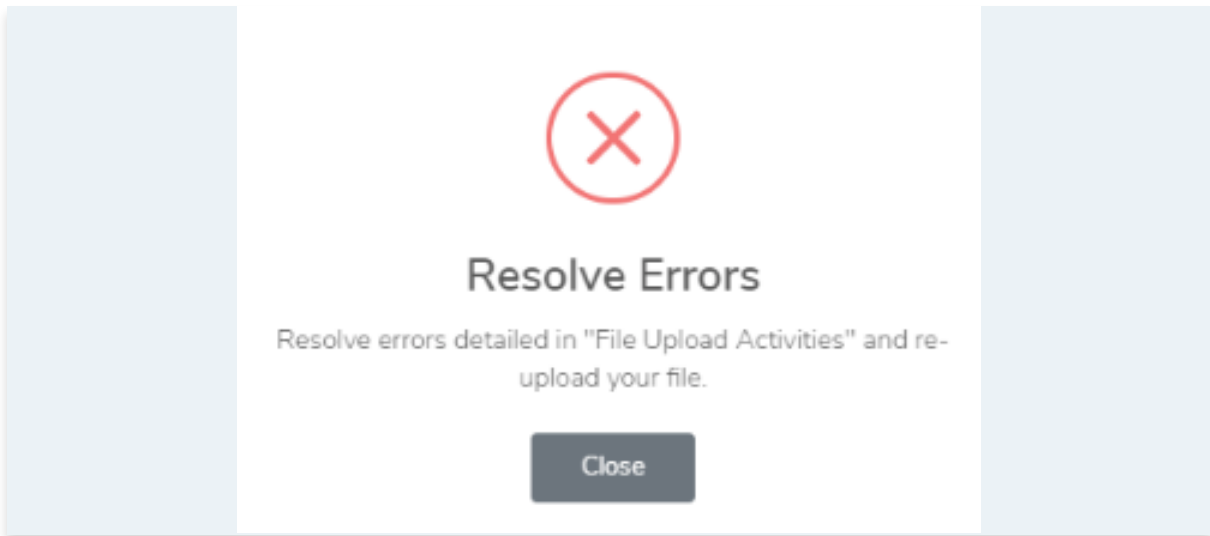
1. From the **Dashboard**, click **Data Management** in the left hand navigation.



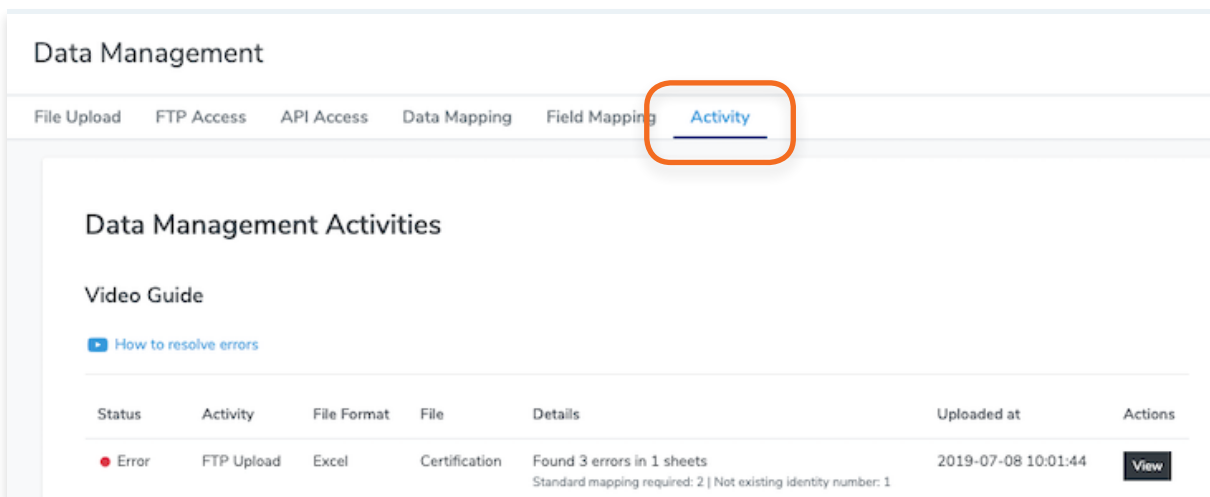
2. Upload a file. Click **Upload Certification Bodies**.

The screenshot shows the 'Upload Data' section of the IAF CertSearch interface. It is titled 'Download Data Templates' and 'Upload Certification Body'. There are two buttons: 'Excel Template' and 'XML Template'. Below these is a link: 'View Samples: [Excel Sample File](#), [XML Sample File](#)'. Under the 'Upload Data' heading, there is a note: 'Use the Templates to upload data. And do not use the Sample Files to upload, sample only.' At the bottom, there are two buttons: 'Upload Certification Bodies' (highlighted with an orange box) and 'Upload Certifications'.

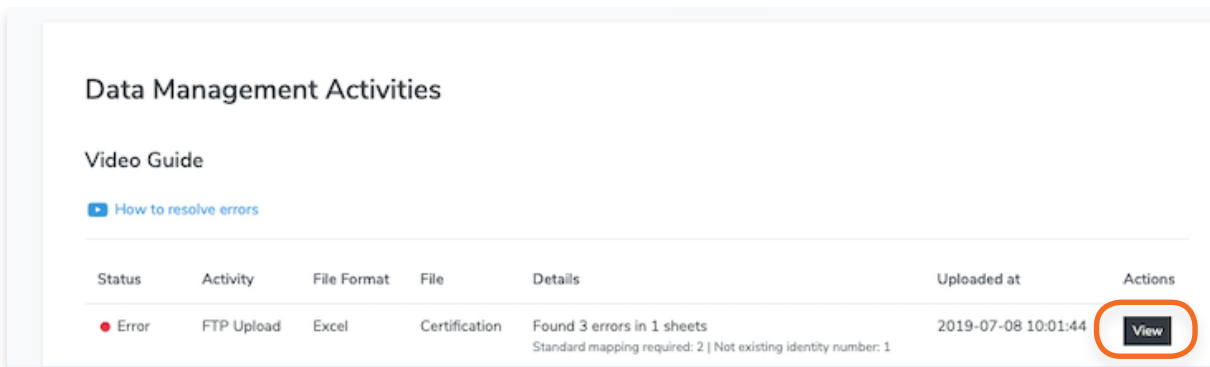
3. If you upload a file with an error, it will be detected.



4. In **Data Management**, click **Activity** in the menu bar.



5. Find the file upload record that includes and error and click **View**.



6. The pop up will show you a list of errors which needs to be resolved.

It will tell you the exact location of the error by Spread Sheet, Field Name, Row, and will include the Field value. It will also include an error message.

In the sample below, this error tells us that a Certification Body Identity Number of a Certification Body is missing.

Activity Details					
Activity	File Upload				
File Type	Excel				
Uploaded at	2019-09-17 12:34:34				
Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification Bodies	Certification Body Identity Number	2		Required data missing	Ensure Certification Body Identity Number is not blank. Please see Data Instruction .

7. Resolve the issue in your file.

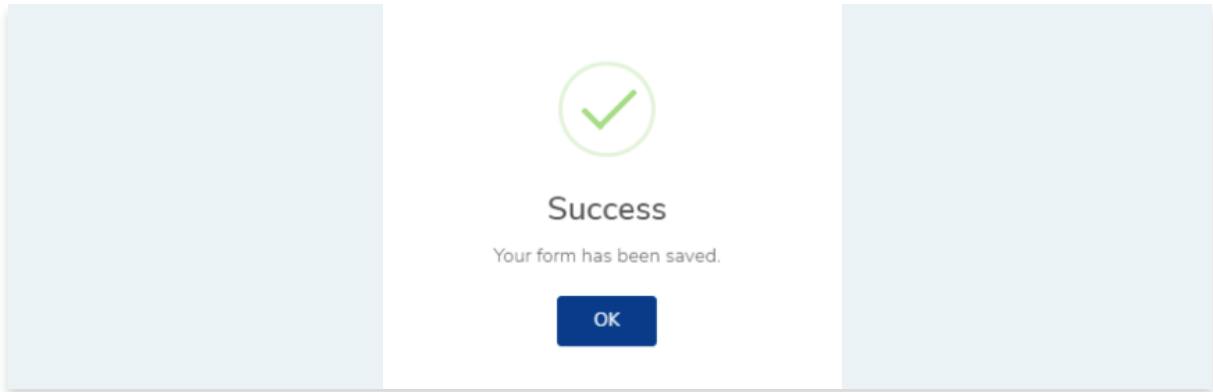
Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address
	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test
UNIQUEID-CB02	Certification Global Incorporated	CGIc	www.Certificationglobal.test	Mrs Grace Example	grace@certifiedcationglobal.test

In this sample, we have to add the Certification body Identity Number.

Certification Body Identity Number	Certification Body Name	Certification Body Acronym	Website	Key Contact	Email Address
	Global Compliance Plus Pty Limited	GCPPL	www.GlobalCompliance.test	Mr Peter Test	info@globalcompliance.test
UNIQUEID-CB02	Certification Global Incorporated	CGIc	www.Certificationglobal.test	Mrs Grace Example	grace@certifiedcationglobal.test

8. Re-upload the file.

9. File Activities will indicate a "Success" if error was resolved.



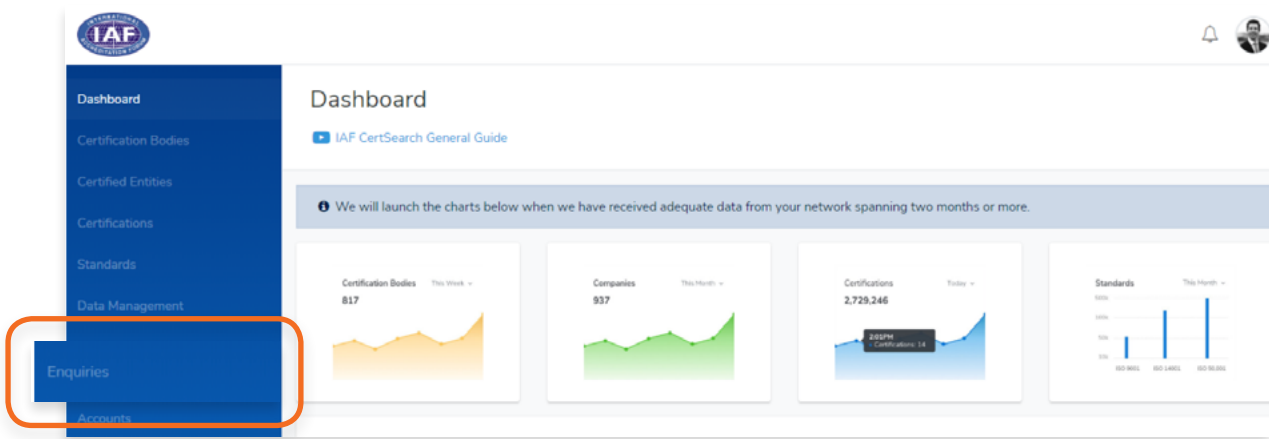
Status	Activity	File Format	File	Details	Uploaded at	Actions
● Success	File Upload	Excel	Certification Body	Excel file has been uploaded.	2019-09-17 12:26:35	

6. Enquiries

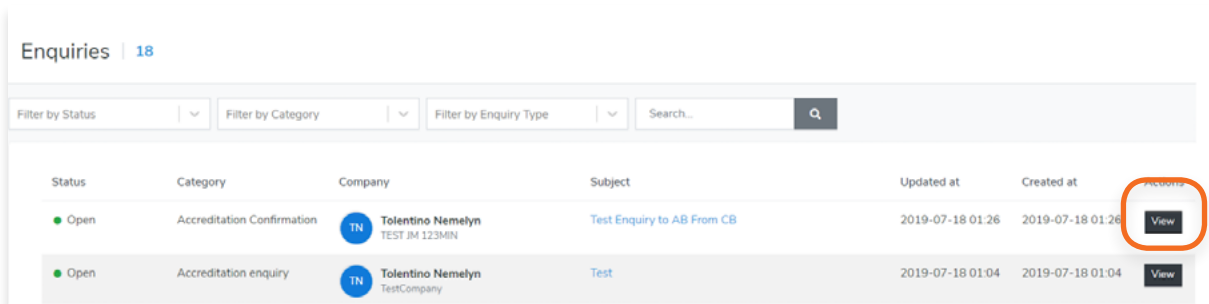
6.1. How to View your Enquiries

On the live profile, there is a form where organisations/users can make enquiries. Enquiries may be accreditation, certification body or general. You can view, respond and resolve all these Enquiries in this page. IAF CertSearch will also send notifications and enquiries to this inbox.

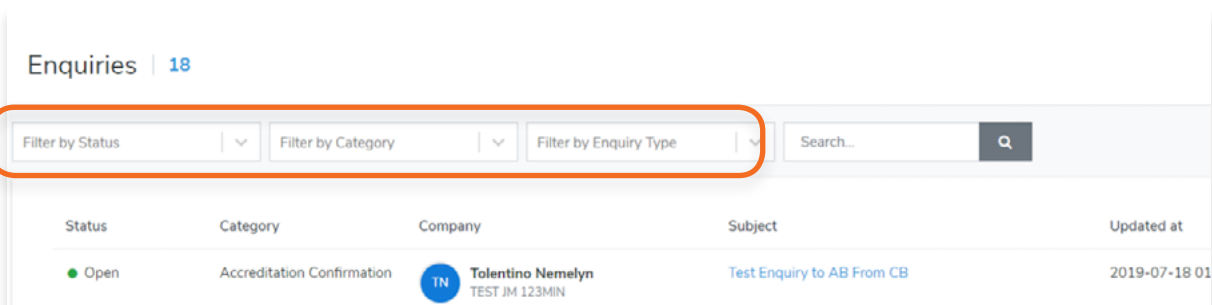
1. From the **Dashboard**, click **Data Management** in the left hand navigation.



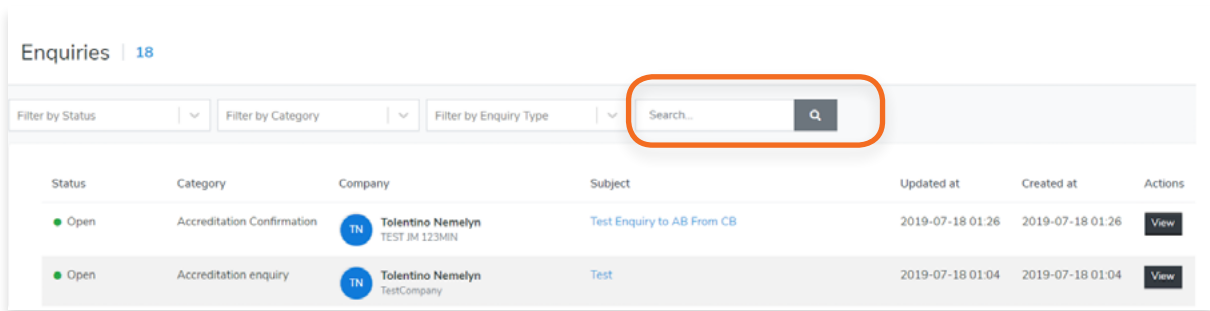
2. Find the specific Enquiry you want to view.



3. You can filter your enquiries by **Status, Category and Enquiry Type**



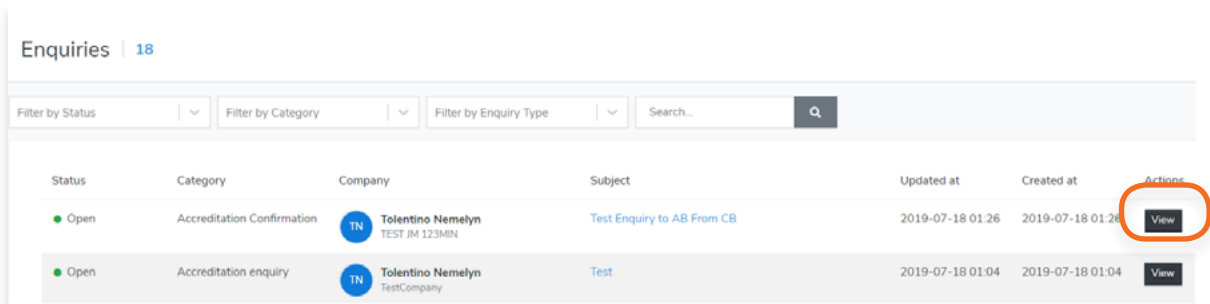
A Search box is also provided to help you search a specific enquiry.



The screenshot shows a table of enquiries. At the top, there are filter buttons for 'Filter by Status', 'Filter by Category', and 'Filter by Enquiry Type'. To the right of these filters is a search box with a magnifying glass icon, which is highlighted with an orange circle. Below the filters is a table with the following columns: Status, Category, Company, Subject, Updated at, Created at, and Actions. The first row shows an 'Open' status, 'Accreditation Confirmation' category, 'Tolentino Nemelyn' company, and subject 'Test Enquiry to AB From CB'. The second row shows an 'Open' status, 'Accreditation enquiry' category, 'Tolentino Nemelyn' company, and subject 'Test'.

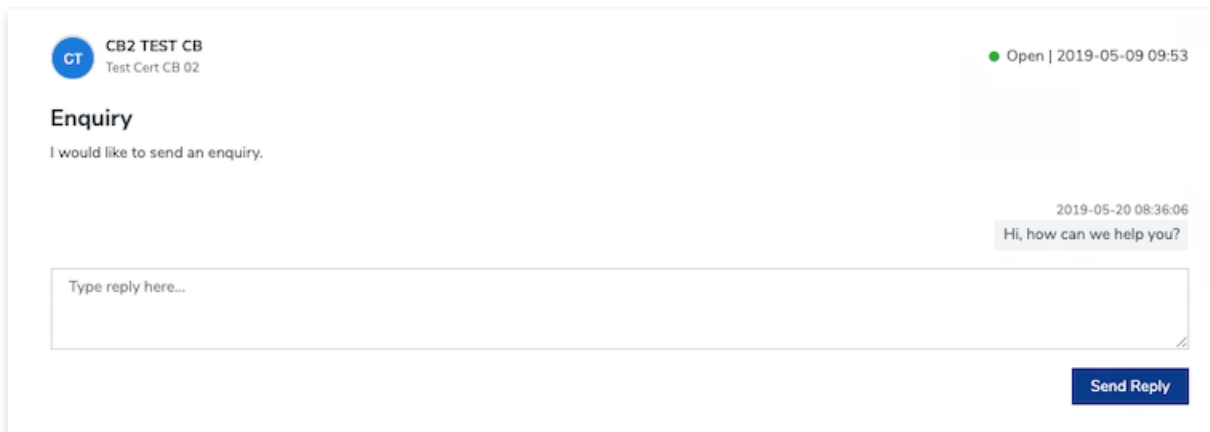
Status	Category	Company	Subject	Updated at	Created at	Actions
Open	Accreditation Confirmation	Tolentino Nemelyn TEST JM 123MIN	Test Enquiry to AB From CB	2019-07-18 01:26	2019-07-18 01:26	View
Open	Accreditation enquiry	Tolentino Nemelyn TestCompany	Test	2019-07-18 01:04	2019-07-18 01:04	View

4. Click **View**



This screenshot is identical to the previous one, but the 'View' button in the 'Actions' column of the first row is highlighted with an orange circle.

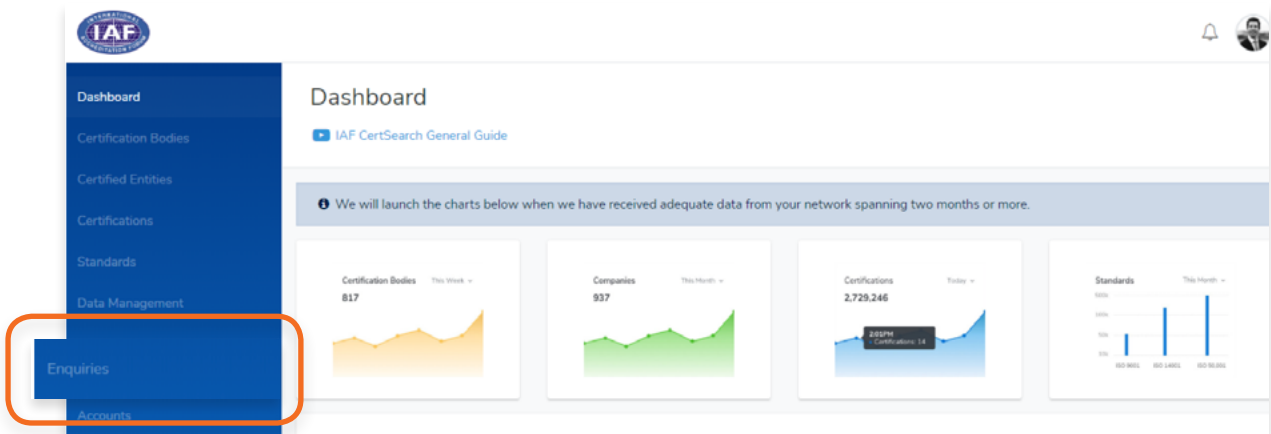
5. Now you can view the Enquiry.



The screenshot shows the detailed view of an enquiry. At the top left, there is a profile icon for 'GT' and the name 'CB2 TEST CB' with the subtitle 'Test Cert CB 02'. To the right, the status is 'Open' and the date is '2019-05-09 09:53'. Below this, the word 'Enquiry' is displayed in a larger font, followed by the text 'I would like to send an enquiry.' On the right side, there is a message bubble with the text 'Hi, how can we help you?' and a timestamp of '2019-05-20 08:36:06'. At the bottom, there is a text input field with the placeholder 'Type reply here...' and a blue 'Send Reply' button.

6.2. How to reply to Enquiries

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Find the specific Enquiry you want to respond to
3. Click **View**.

The screenshot shows the 'Enquiries | 18' page. It includes filter options for Status, Category, and Enquiry Type, along with a search bar. Below is a table of enquiries:

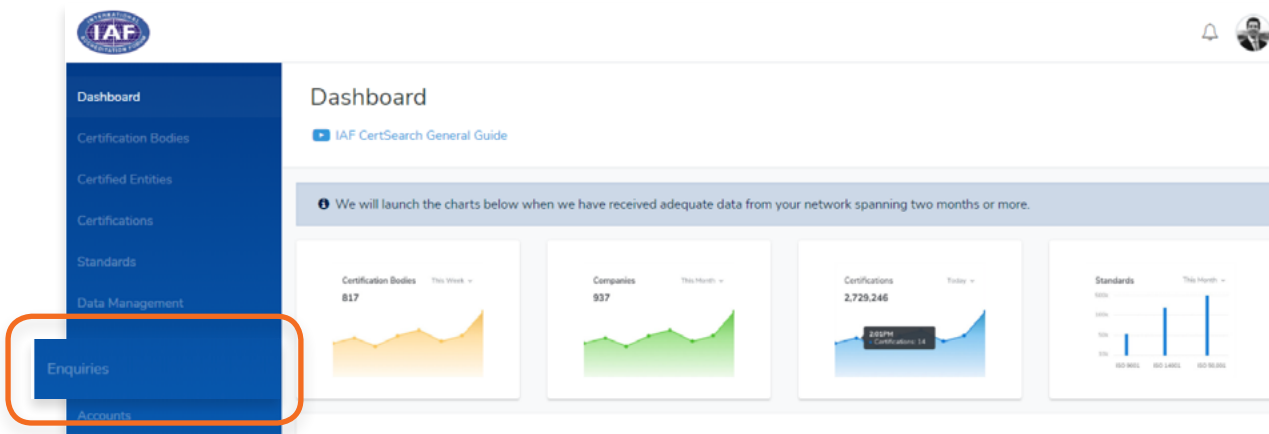
Status	Category	Company	Subject	Updated at	Created at	Actions
Open	Accreditation Confirmation	TN Tolentino Nemelyn TEST JM 123MIN	Test Enquiry to AB From CB	2019-07-18 01:26	2019-07-18 01:26	View
Open	Accreditation enquiry	TN Tolentino Nemelyn TestCompany	Test	2019-07-18 01:04	2019-07-18 01:04	View

4. You can respond to an Enquiry by typing in your response in the text box. Click Send Reply to respond.

The screenshot shows the details of an enquiry from 'CB2 TEST CB' (Test Cert CB 02). The enquiry status is 'Open' and it was received on 2019-05-09 09:53. The enquiry text is 'I would like to send an enquiry.' A response from the user is visible, dated 2019-05-20 08:36:06, with the text 'Hi, how can we help you?'. Below the response is a text input field with the placeholder 'Type reply here...'. At the bottom right, the 'Send Reply' button is highlighted with an orange box.

6.3. How to resolve Enquiries

1. From the **Dashboard**, click **Data Management** in the left hand navigation.



2. Find the specific Enquiry you want to respond to
3. Click **View**.

Status	Category	Company	Subject	Updated at	Created at	Actions
Open	Accreditation Confirmation	Tolentino Nemelyn TEST IM 123MIN	Test Enquiry to AB From CB	2019-07-18 01:26	2019-07-18 01:26	View
Open	Accreditation enquiry	Tolentino Nemelyn TestCompany	Test	2019-07-18 01:04	2019-07-18 01:04	View

4. You can respond to an Enquiry by typing in your response in the text box. Click Send Reply to respond.

Resolve Enquiry

TO ABC Company
ABC Company

Enquiry
I would like to send an enquiry.

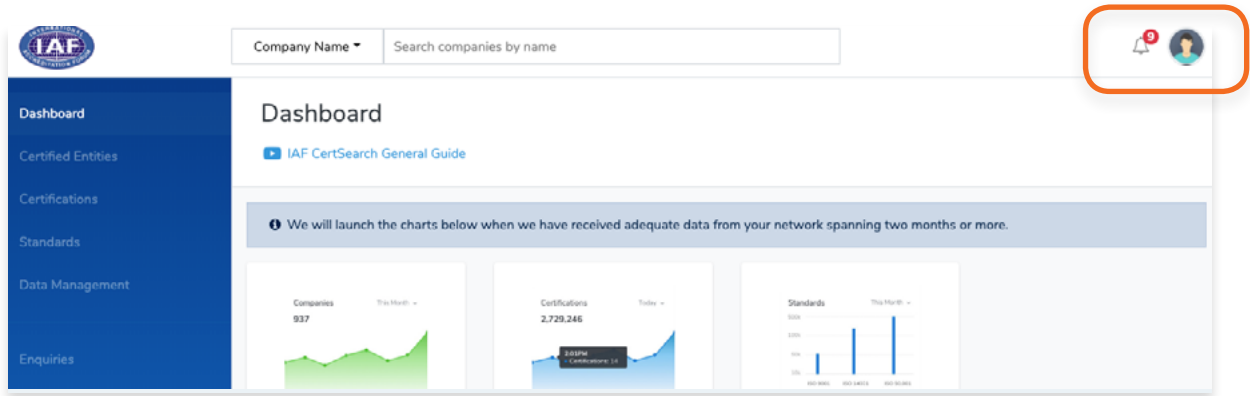
2019-05-20 09:33:25
Hi, how can we help you?

Type reply here...

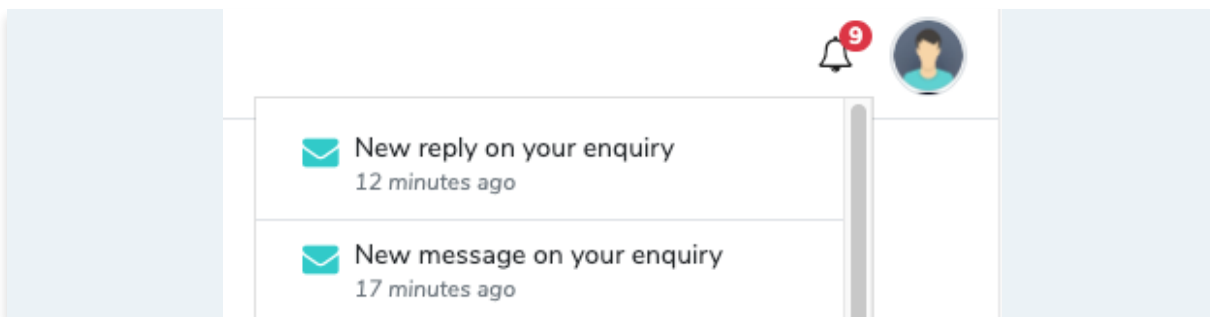
Send Reply

6.4. How to View pending notifications

Once logged in, in the top right corner there is a notification icon. The number of pending notifications will be denoted here. Notifications include Enquiries and Data Management actions.



1. This icon will show you the number pending notifications.



2. Click the Icon and the notifications will be shown.

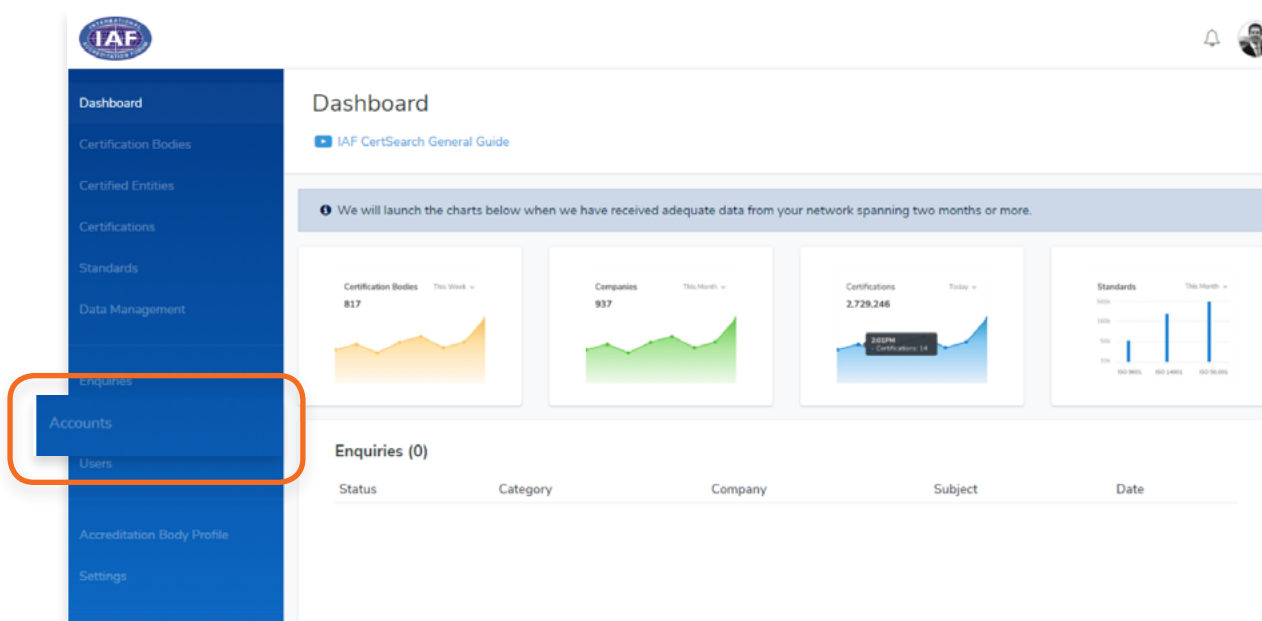
3. Click on a specific notification to resolve or respond.

7. Accounts

7.1. How to View Account

You can create multiple accounts under the registered Accreditation Body entity. The Accreditation Body is the legal entity which is accredited, the accounts sit below the legal entity. The account user will be able to manage data (View, Upload, Edit and Delete) and receive enquiries from IAF CertSearch for their Account. It may be useful if you have different offices, states, provinces, or countries or locations who manage their own accreditation data within the Accreditation Body account (Registered company).

1. From the **Dashboard**, click **Accounts** in the left hand navigation.



2. Here you can view the list of your current accounts.

3. Find the account you want to view

4. Click **View**

You will be able to view the Account Details containing the Status, Location, and Account

Information.


Accounts | 3

You can create multiple accounts under this Certification Body Account. The account user will be able to manage data (View, Upload, Edit and Delete) and receive enquiries from the IAF CertSearch for their location. [More Detail](#)

[How to manage account details](#)

Filter by Status Filter by Location Search...

Status	Account	Location	Updated at	Created at	Actions
Inactive	Best Practice - Branch 1	Canada	2019-08-06	2019-07-22	<input type="button" value="View"/>
Active	Best Practice - Branch 2	Australia	2019-07-01	2019-07-01	<input type="button" value="View"/>
Active	Best Practice Certification (HQ)	Australia	2019-07-17	2019-06-25	<input type="button" value="View"/>

 **Best Practice Certification**

[Details](#) [Users](#)

Account Details

Status

Account Status:

Location

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

Economy/Country:

Address:

Account Information

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name:

Account Email:

Key Contact Name:

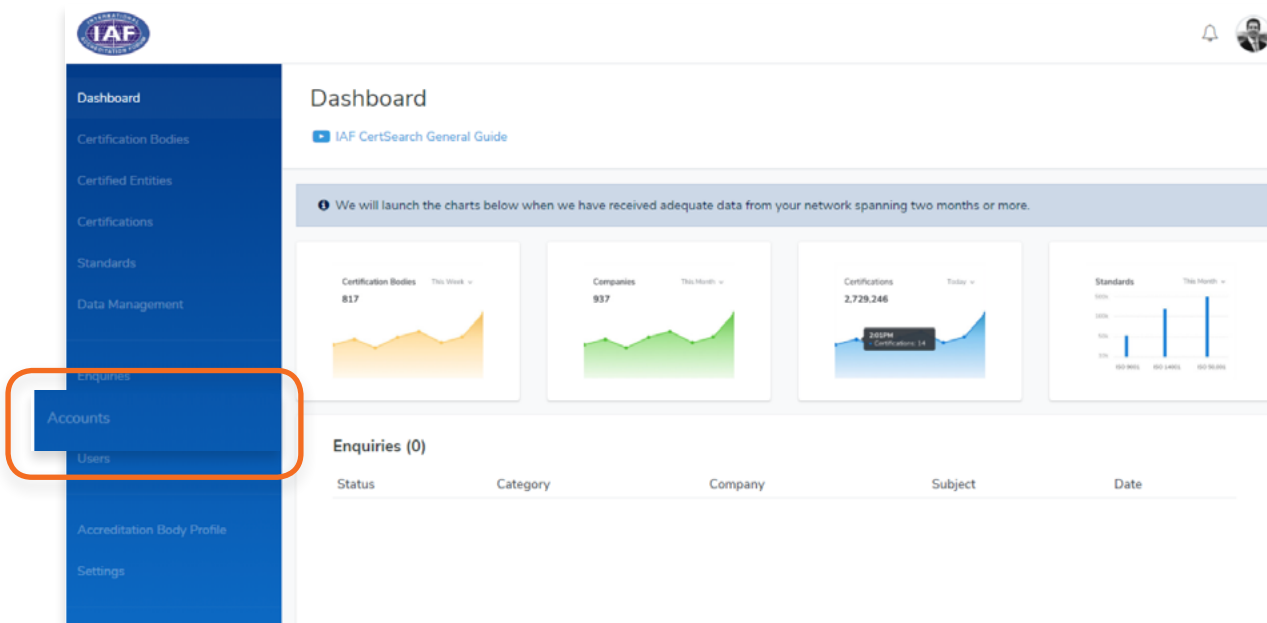
Account Website:

7.2. How to Change Account details

View the step by step guide below or watch the video guide here:

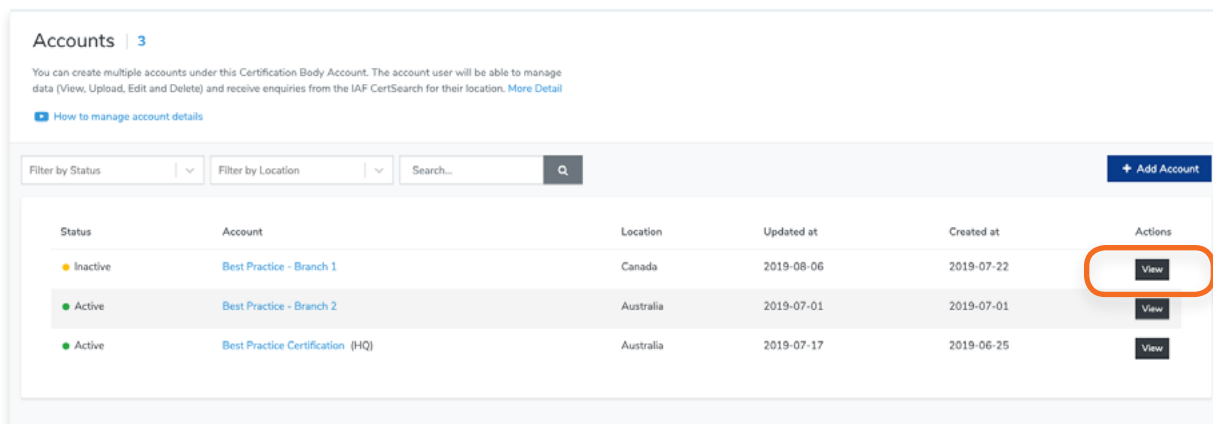
<https://youtu.be/fVteF8xbqn8>

1. From the **Dashboard**, click **Accounts** in the left hand navigation.

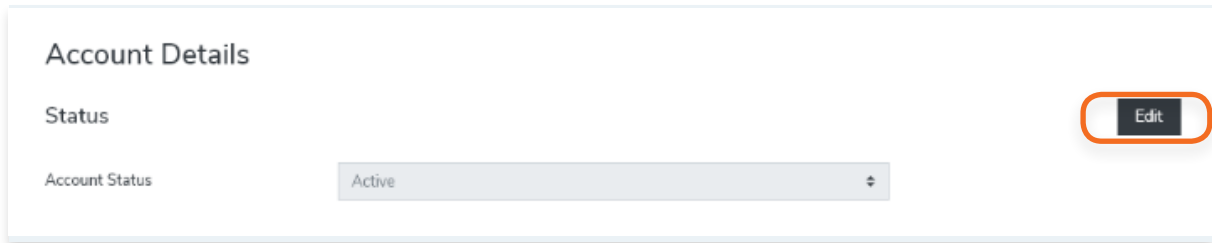


Here you can view the list of your current accounts.

2. Find the account you want to edit
3. Click View



4. Go to the **Status** section and click **Edit**.



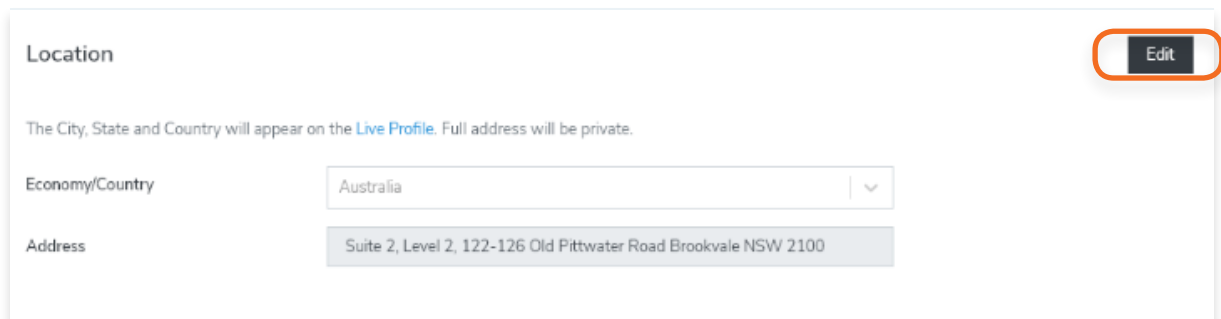
Account Details

Status **Edit**

Account Status Active

5. Click **Edit**, and select the status : **Active, Withdrawn, Suspended or Pending**. Click **Save changes**.

6. Go to the Location section and click **Edit**.



Location **Edit**

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

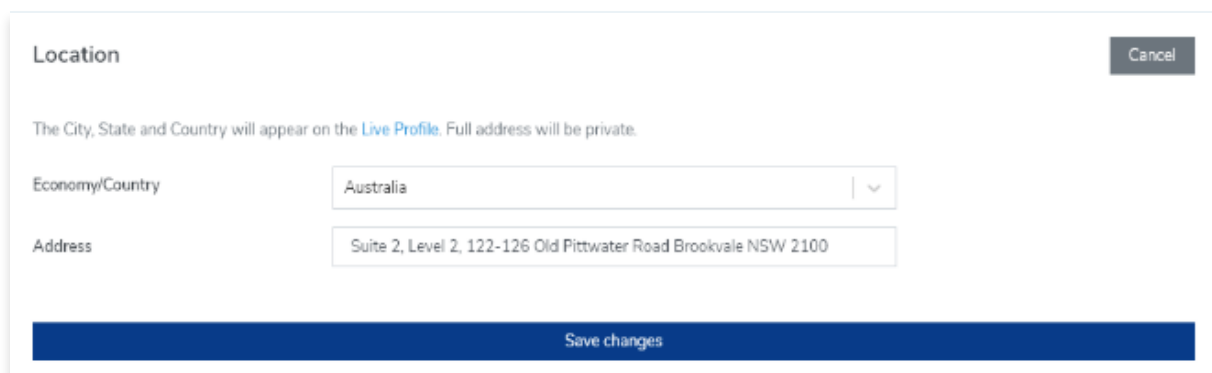
Economy/Country Australia

Address Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100

7. Here you can edit the **Economy/Country** and the Address of the account.

Note: the City, State and Country will appear on the Live Profile.

8. Click **Save changes**.



Location Cancel

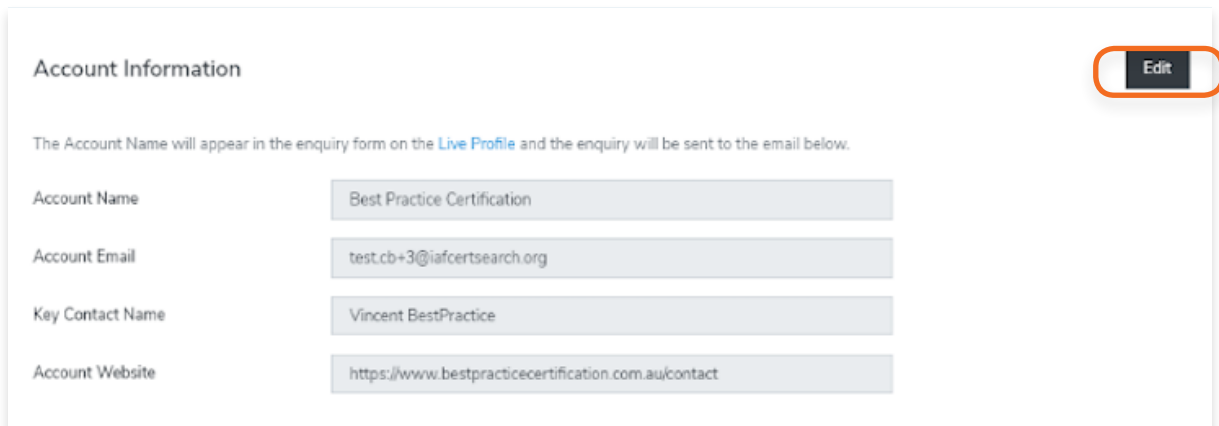
The City, State and Country will appear on the [Live Profile](#). Full address will be private.

Economy/Country Australia

Address Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100

Save changes

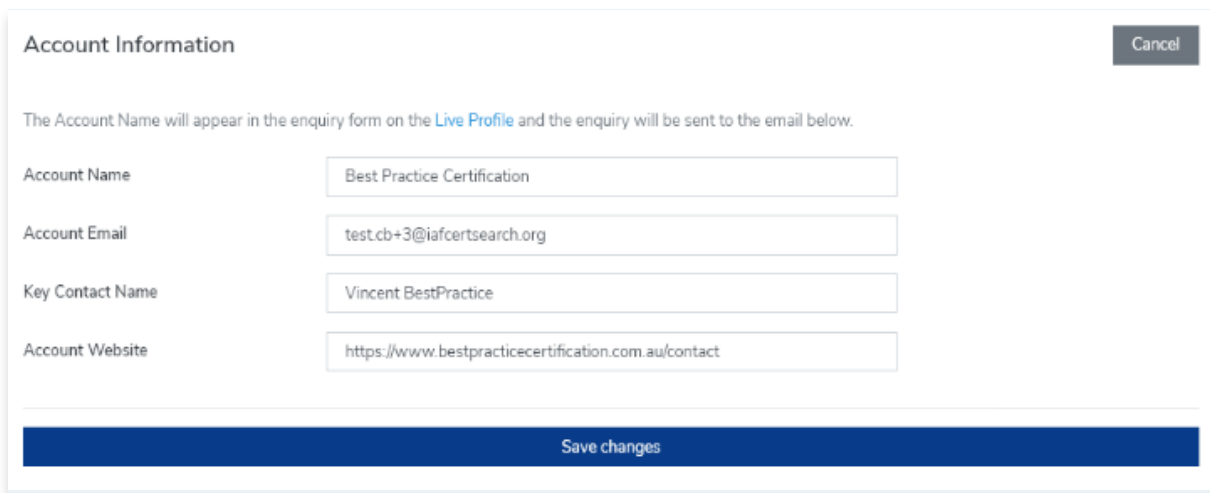
9. Go to the Account Information section and click **Edit**.



The screenshot shows a form titled "Account Information". In the top right corner, there is a dark grey button labeled "Edit" which is highlighted with a red rectangular border. Below the title, there is a line of text: "The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below." The form contains four input fields, each with a label on the left and a text box on the right:

Account Name	Best Practice Certification
Account Email	test.cb+3@iafcertsearch.org
Key Contact Name	Vincent BestPractice
Account Website	https://www.bestpracticecertification.com.au/contact

10. You can edit the Account Name, Account Email, Key Contact Name, and Account Website information. The Account name will appear in the enquiry form on the Live Profile and the enquiry will be sent to the email indicated in the Account Email box.



The screenshot shows the same "Account Information" form as in the previous image. In this version, the "Edit" button is no longer present. Instead, there is a dark grey button labeled "Cancel" in the top right corner. At the bottom of the form, there is a prominent blue button labeled "Save changes". The input fields and their values remain the same as in the previous screenshot:

Account Name	Best Practice Certification
Account Email	test.cb+3@iafcertsearch.org
Key Contact Name	Vincent BestPractice
Account Website	https://www.bestpracticecertification.com.au/contact

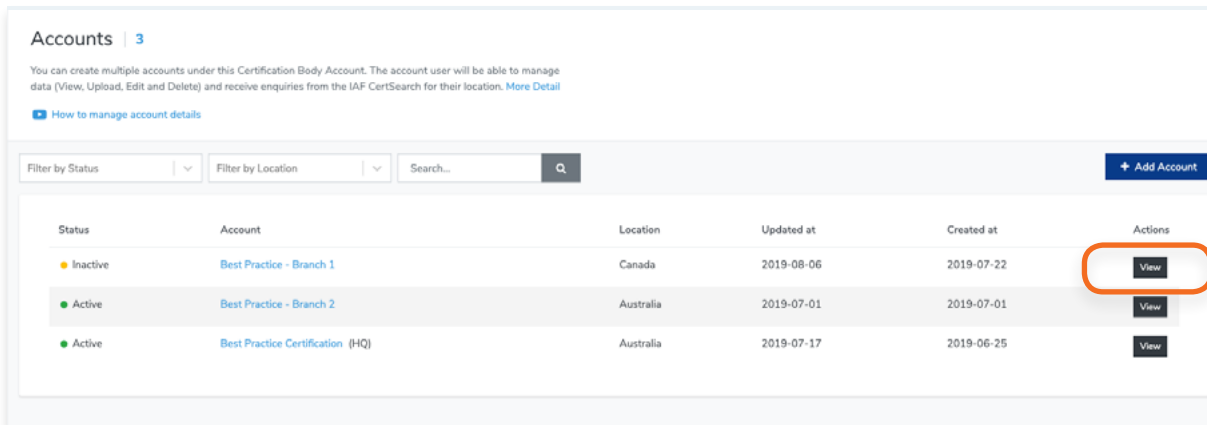
11. Click **Save changes**.

7.2.1. How to Change the Account Email

View the step by step guide below or watch the video guide here:

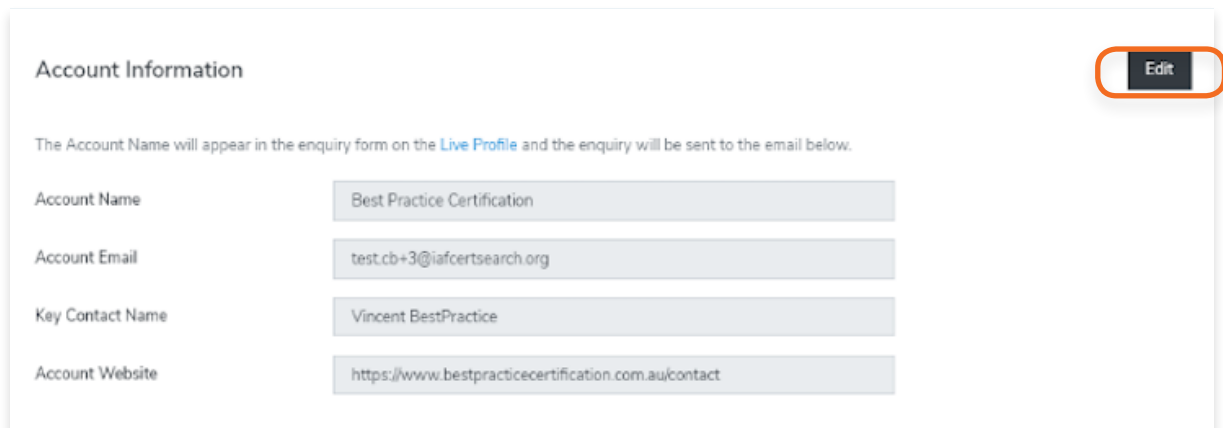
<https://youtu.be/P9LppjCEoqE>

1. From the **Dashboard**, click **Accounts** in the left hand navigation.
2. Find the account you want to edit
3. Click **View**



Status	Account	Location	Updated at	Created at	Actions
Inactive	Best Practice - Branch 1	Canada	2019-08-06	2019-07-22	View
Active	Best Practice - Branch 2	Australia	2019-07-01	2019-07-01	View
Active	Best Practice Certification (HQ)	Australia	2019-07-17	2019-06-25	View

4. Go to the **Account Information** section and click **Edit**.



Account Information Edit

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name: Best Practice Certification

Account Email: test.cb+3@iafcertsearch.org

Key Contact Name: Vincent BestPractice

Account Website: https://www.bestpracticecertification.com.au/contact

5. Change the email address. Enquiries will be sent to the email indicated in the Account Email box.

Account Information Cancel

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name	<input type="text" value="Best Practice Certification"/>
Account Email	<input type="text" value="test.cb+3@iafcertsearch.org"/>
Key Contact Name	<input type="text" value="Vincent BestPractice"/>
Account Website	<input type="text" value="https://www.bestpracticecertification.com.au/contact"/>

[Save changes](#)

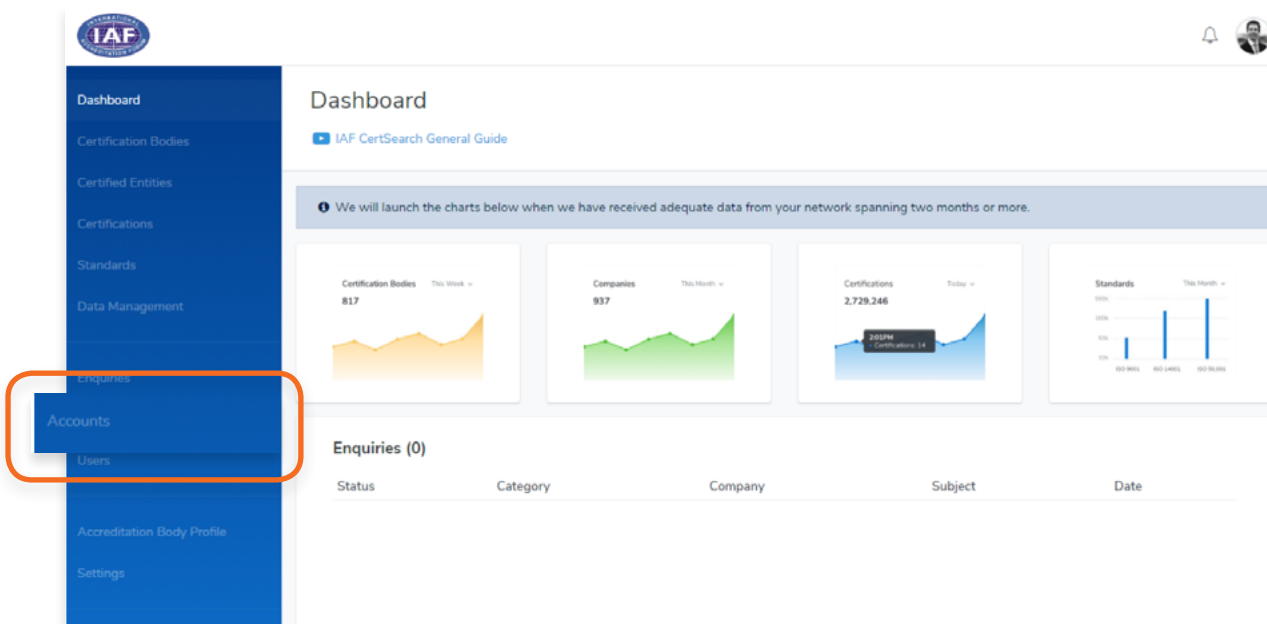
6. Click **Save changes**.

7.3. How to Add an Account

View the step by step guide below or watch the video guide here:

https://youtu.be/C6_PCHHnkvU

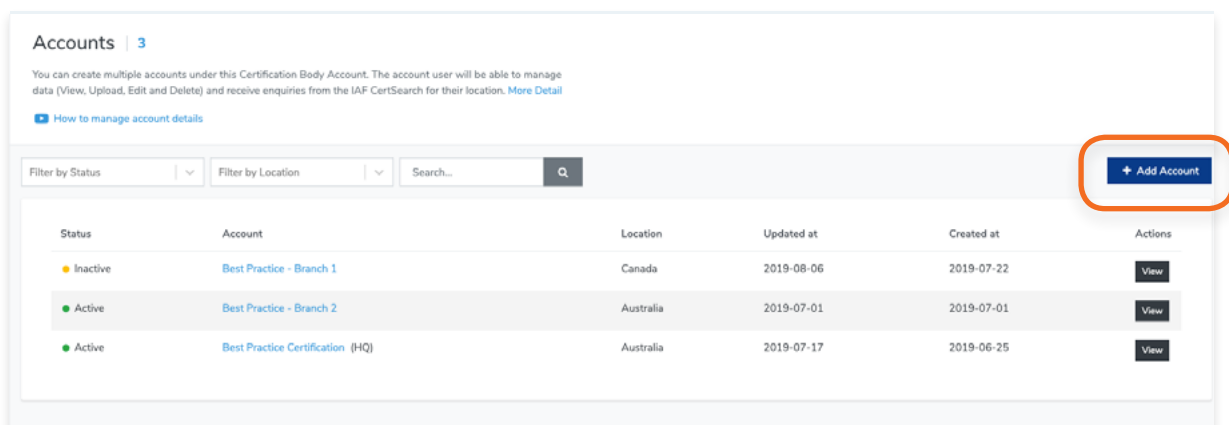
1. From the **Dashboard**, click Accounts in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with 'Accounts' highlighted by an orange box. The main dashboard area shows several charts for Certification Bodies (817), Companies (937), Certifications (2,729,246), and Standards. Below the charts is an 'Enquiries (0)' section with a table header.

Status	Category	Company	Subject	Date
--------	----------	---------	---------	------

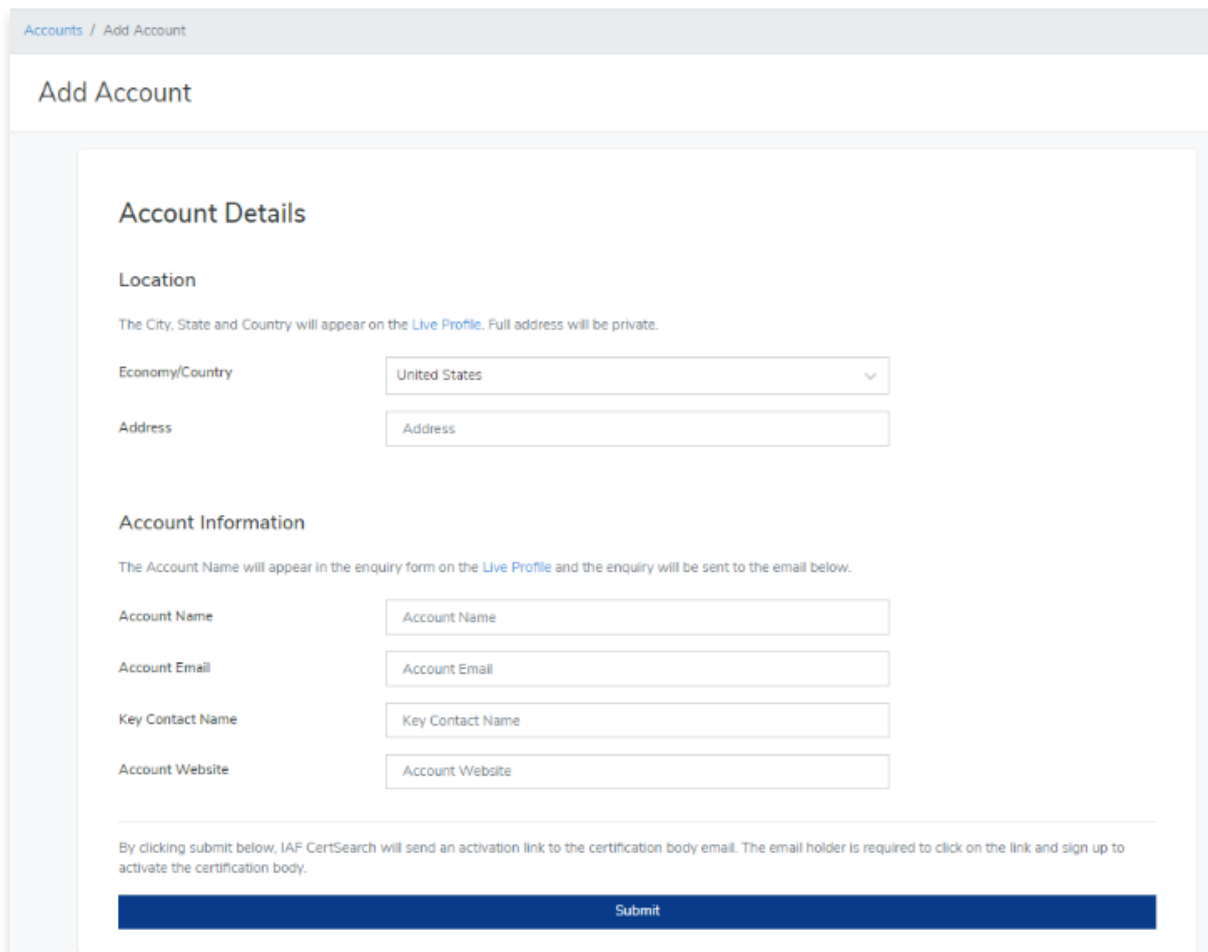
2. In the Accounts page, click **+ Add Account**.



The screenshot shows the Accounts page. The page title is 'Accounts | 3'. Below the title is a description and a link to 'How to manage account details'. There are filters for 'Filter by Status' and 'Filter by Location', and a search bar. A table lists three accounts with columns for Status, Account, Location, Updated at, Created at, and Actions. The '+ Add Account' button is highlighted with an orange box.

Status	Account	Location	Updated at	Created at	Actions
Inactive	Best Practice - Branch 1	Canada	2019-08-06	2019-07-22	View
Active	Best Practice - Branch 2	Australia	2019-07-01	2019-07-01	View
Active	Best Practice Certification (HQ)	Australia	2019-07-17	2019-06-25	View

3. Enter **Location and Account Information.**



Accounts / Add Account

Add Account

Account Details

Location

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

Economy/Country

Address

Account Information

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name

Account Email

Key Contact Name

Account Website

By clicking submit below, IAF CertSearch will send an activation link to the certification body email. The email holder is required to click on the link and sign up to activate the certification body.

[Submit](#)

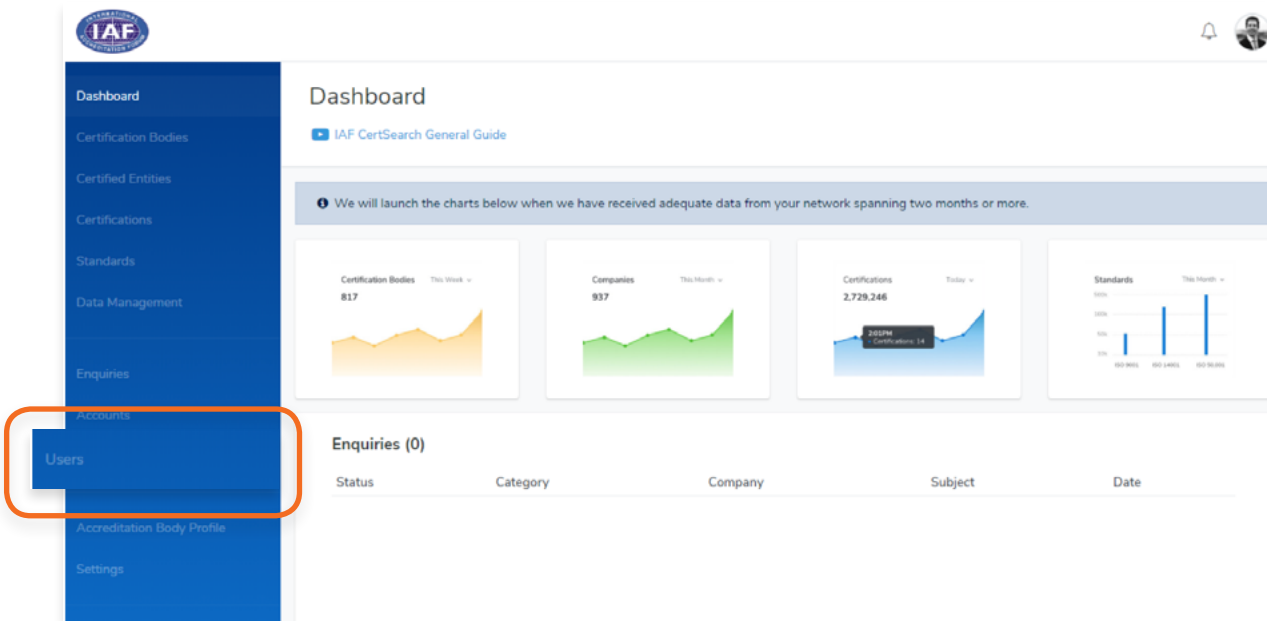
4. Click **Submit**

By clicking the Submit button, IAF CertSearch will send an activation link to the account email. The email holder is required to click on the link and sign up to activate the account.

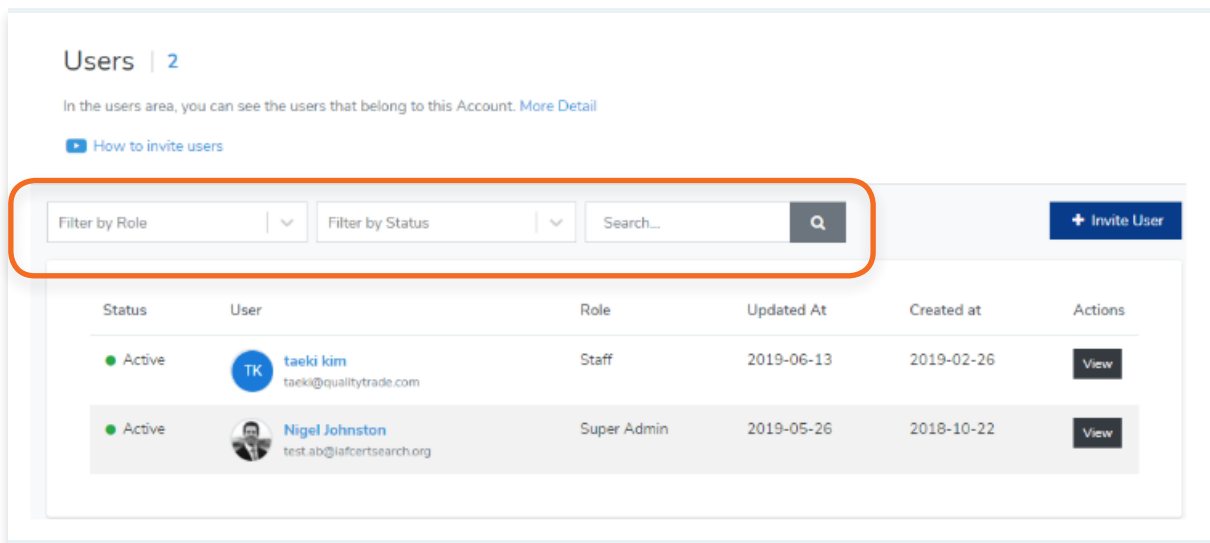
8. Users

8.1. How to View a User

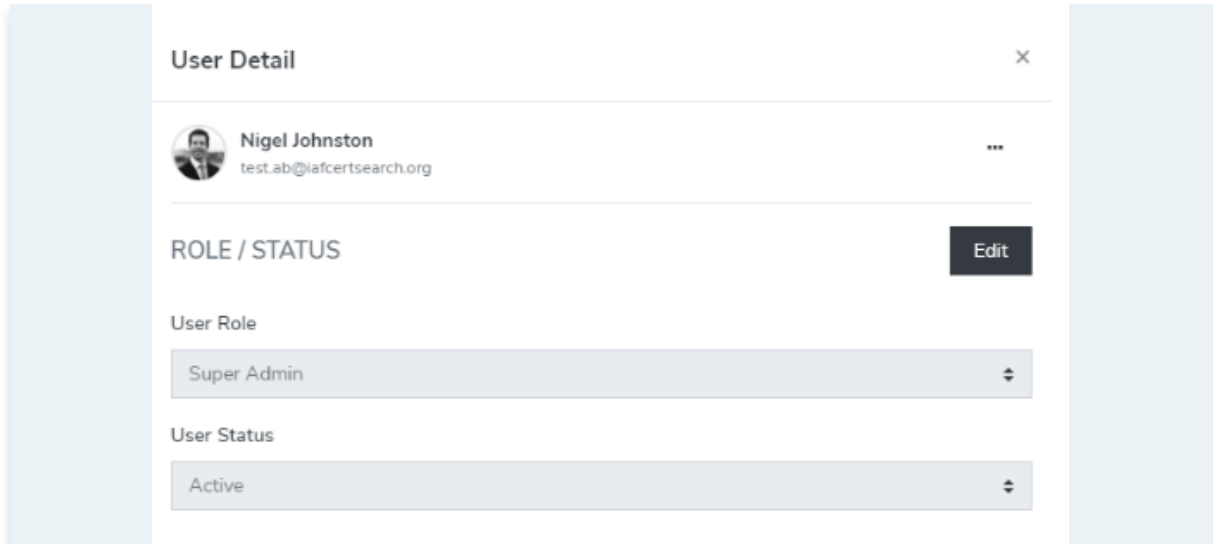
1. From the **Dashboard**, click **Users** in the left hand navigation.



2. You can **filter your users by Role and Status**. You can also use the **Search box** to search users by their name.

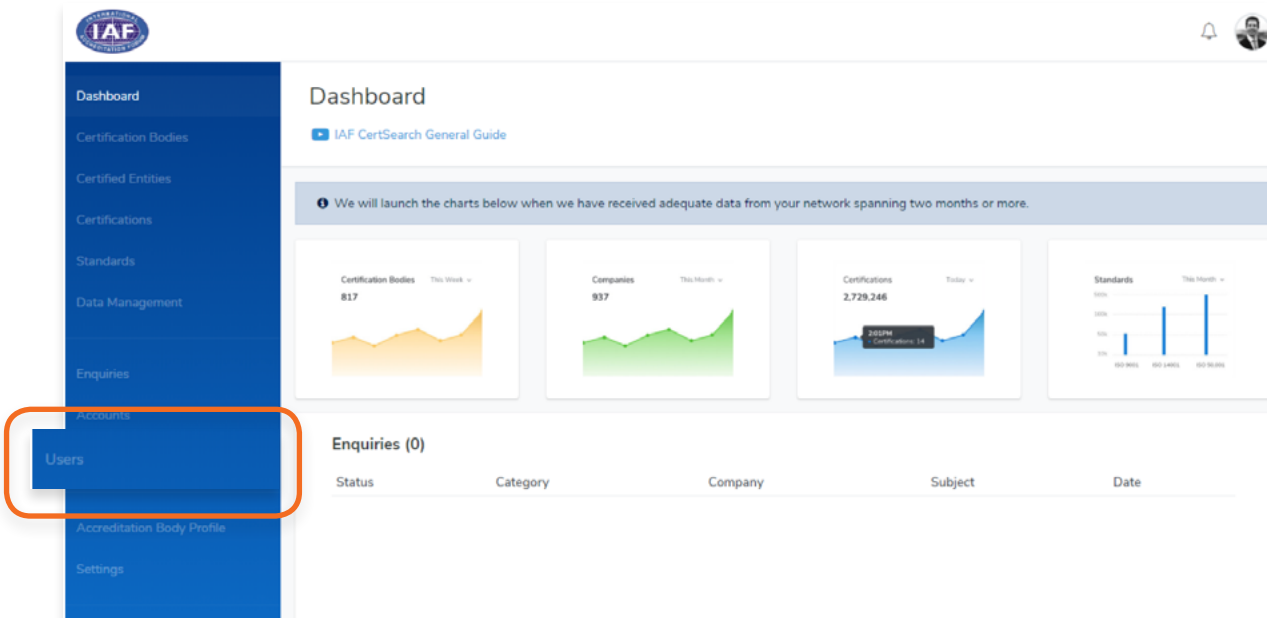


3. Find the User you want to view and click View
4. You will be directed to the user information page where you can view the User Role and User Status.



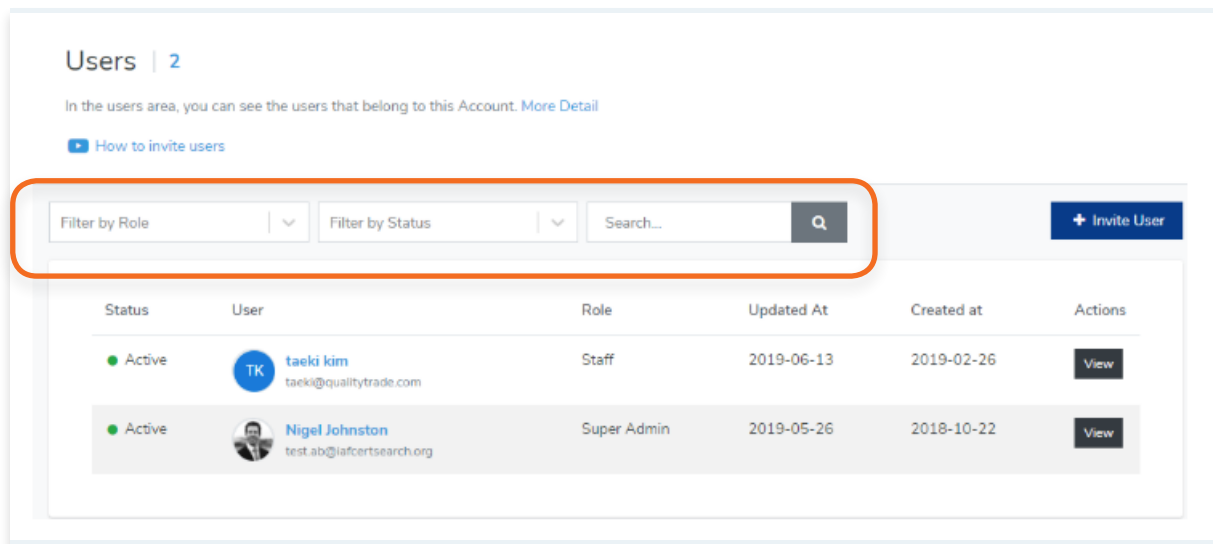
8.2. How to Edit a User

1. From the **Dashboard**, click **Users** in the left hand navigation.





The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with 'Users' highlighted by an orange box. The main dashboard area shows various charts and a table for 'Enquiries (0)'. The charts include 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. The table has columns for Status, Category, Company, Subject, and Date.

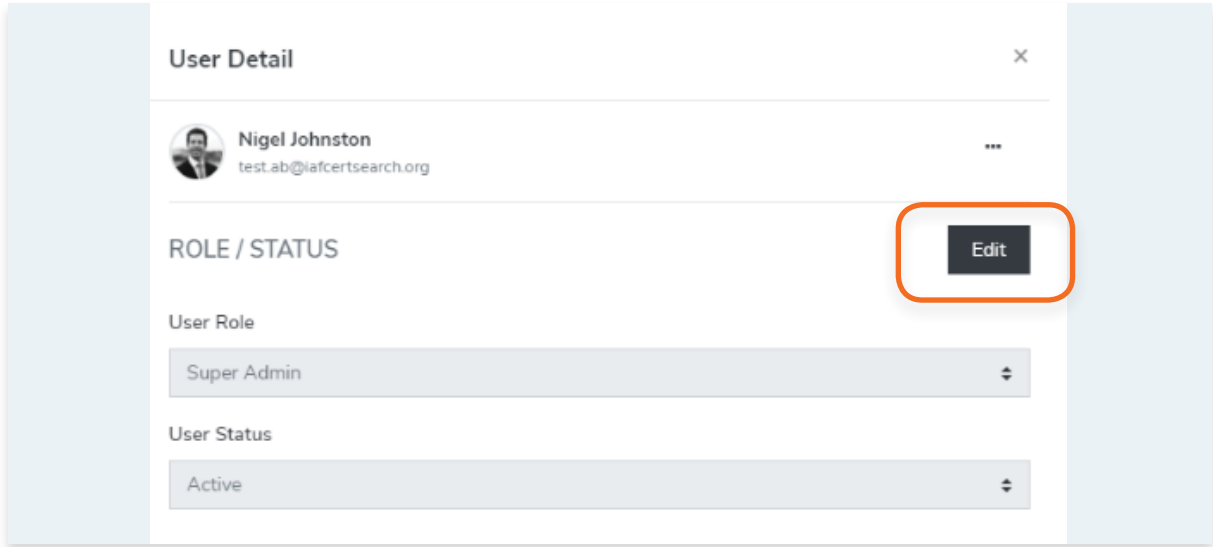
2. You can **filter your users by Role and Status**. You can also use the **Search box** to search users by their name.



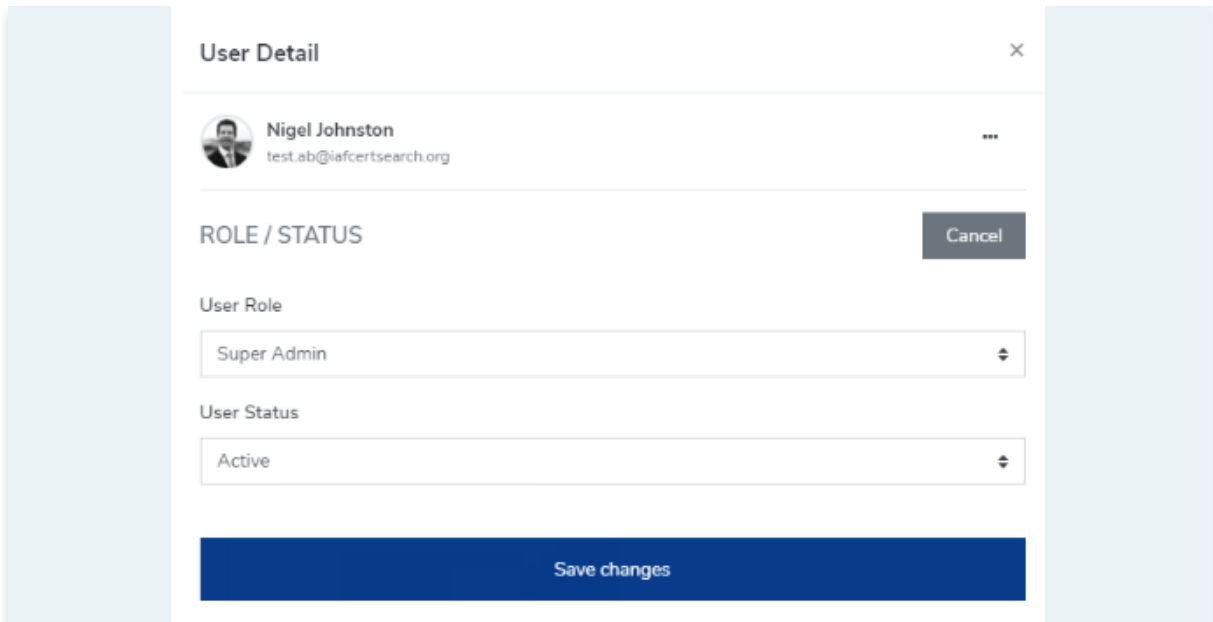
The screenshot shows the IAF CertSearch Users page. The page title is 'Users | 2'. Below the title, there is a description: 'In the users area, you can see the users that belong to this Account. [More Detail](#)'. There is a link 'How to invite users' and a '+ Invite User' button. The filter and search controls are highlighted with an orange box. The table below shows the list of users.

Status	User	Role	Updated At	Created at	Actions
Active	 taeki kim taeki@qualitytrade.com	Staff	2019-06-13	2019-02-26	View
Active	 Nigel Johnston test.ab@iafcertsearch.org	Super Admin	2019-05-26	2018-10-22	View

3. You will be directed to the user information page where you can edit the User Role and User Status.
4. Click **Edit**



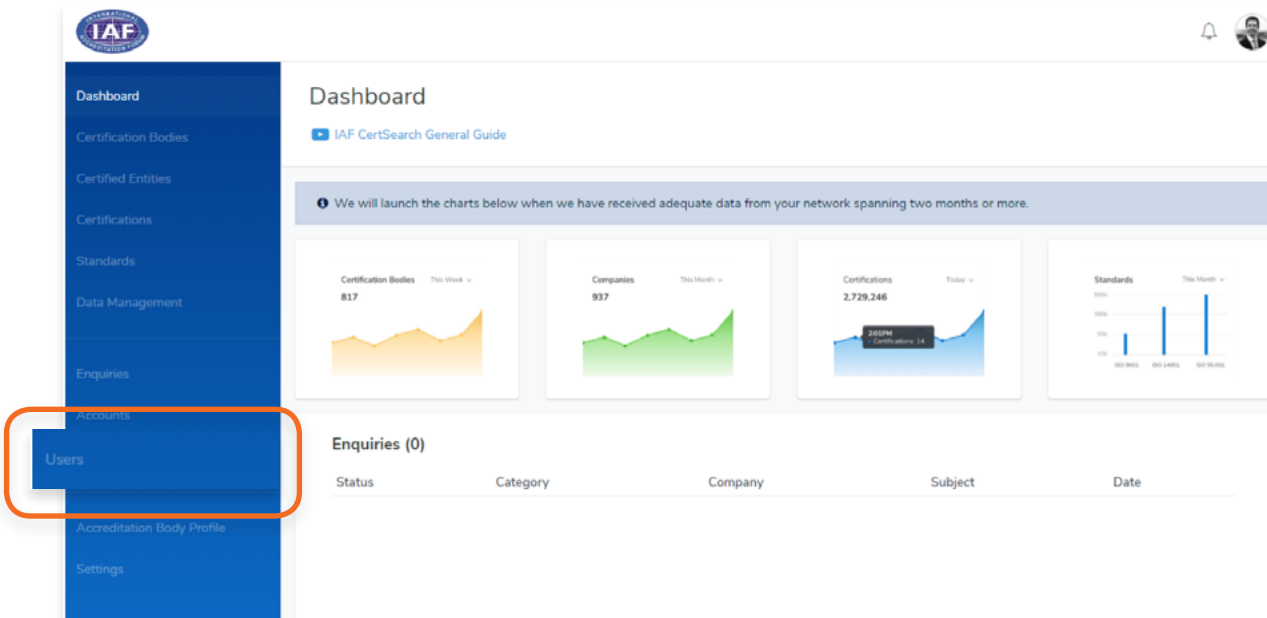
5. Select the User Role (Super Admin, Admin or Staff). You can also change the status from Active, Inactive, Suspending or Pending.



6. Click **Save changes** once done or click Cancel to revert any changes.

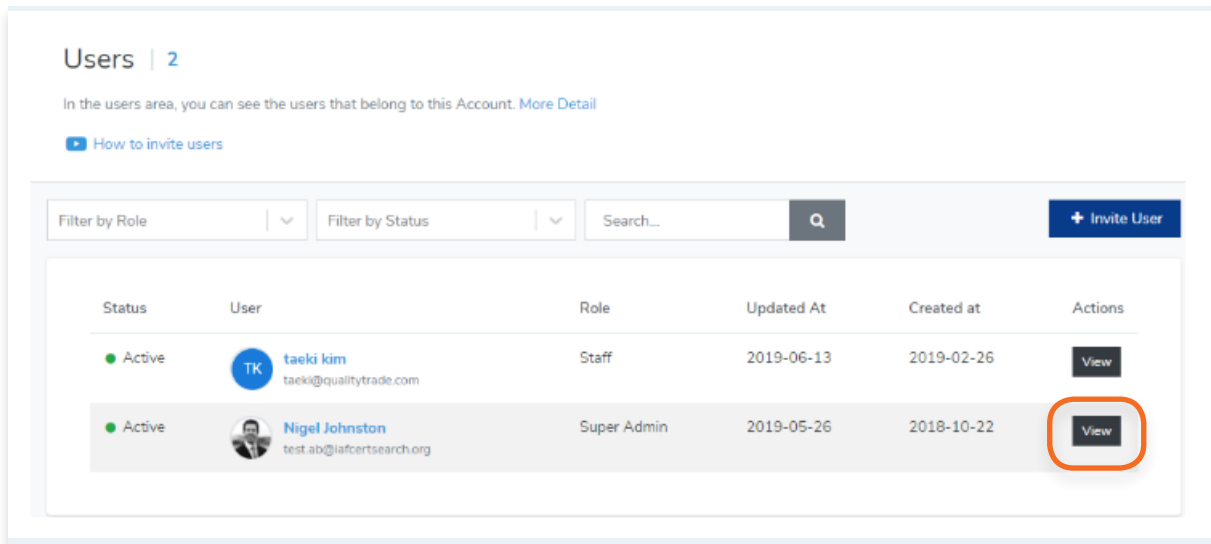
8.3. How to Delete a User

1. From the **Dashboard**, click **Users** in the left hand navigation.





The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with the 'Users' option highlighted by an orange rectangular box. The main dashboard area displays several charts and a table. The 'Enquiries (0)' table has columns for Status, Category, Company, Subject, and Date.

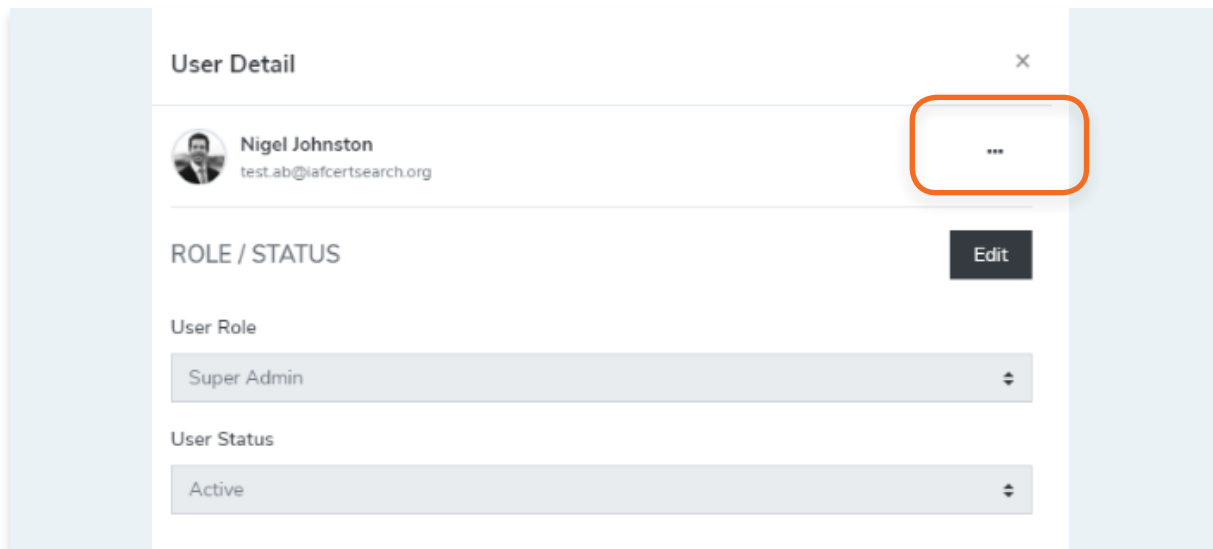
2. You can **filter your users by Role and Status**. You can also use the **Search box** to search users by their name.



The screenshot shows the 'Users | 2' page. It includes a search bar and filter options for 'Filter by Role' and 'Filter by Status'. Below the filters is a table of users. The 'View' button for the user 'Nigel Johnston' is highlighted with an orange rectangular box.

Status	User	Role	Updated At	Created at	Actions
Active	 taeki kim taeki@qualitytrade.com	Staff	2019-06-13	2019-02-26	View
Active	 Nigel Johnston test.ab@iafcertsearch.org	Super Admin	2019-05-26	2018-10-22	View

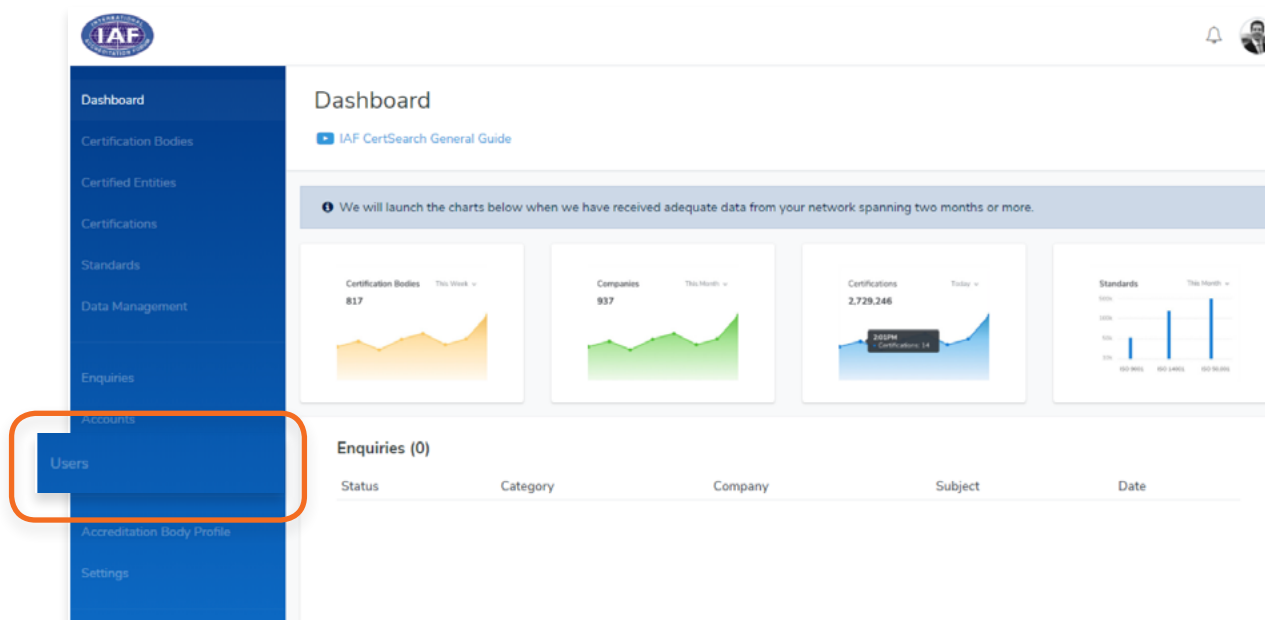
3. Click on the **options icon “...”** and follow the prompts.



4.

8.4. How to Invite a New User

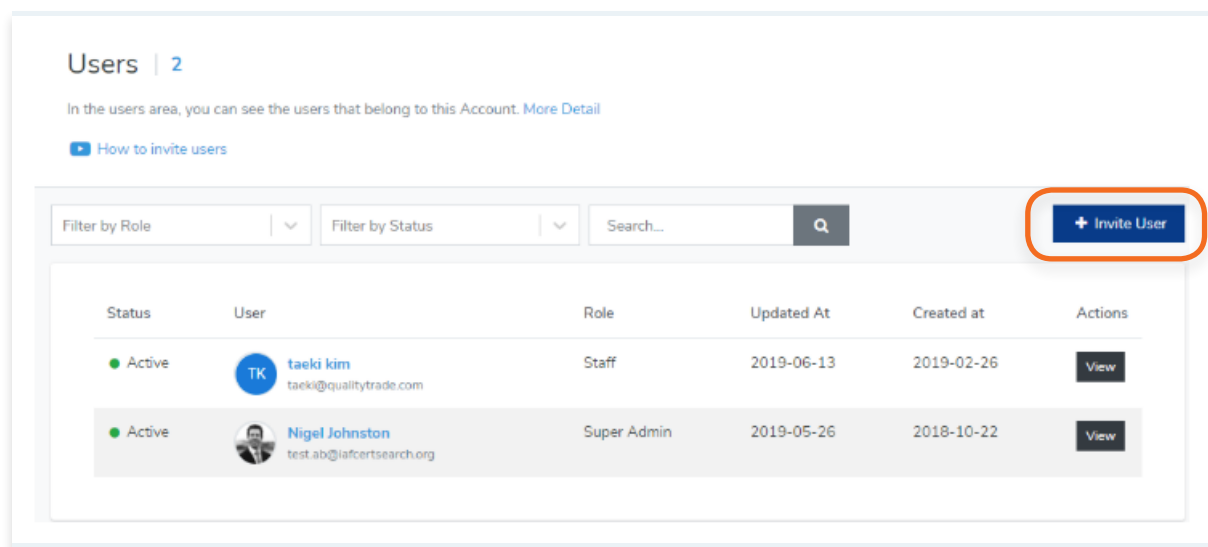
1. From the **Dashboard**, click **Users** in the left hand navigation.





The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with the 'Users' option highlighted by an orange rectangle. The main dashboard area displays several charts and a table. The 'Enquiries (0)' table is currently empty.

Status	Category	Company	Subject	Date
Enquiries (0)				

2. Click **+ Invite User**



The screenshot shows the 'Users' page. At the top, it says 'Users | 2'. Below this, there is a filter section with 'Filter by Role', 'Filter by Status', and a search box. The '+ Invite User' button is highlighted with an orange rectangle. Below the filter section is a table listing users.

Status	User	Role	Updated At	Created at	Actions
Active	 taeki kim taeki@qualitytrade.com	Staff	2019-06-13	2019-02-26	View
Active	 Nigel Johnston test.ab@iafcertsearch.org	Super Admin	2019-05-26	2018-10-22	View

3. Enter an **Email Address** and click on **Send Invitation**



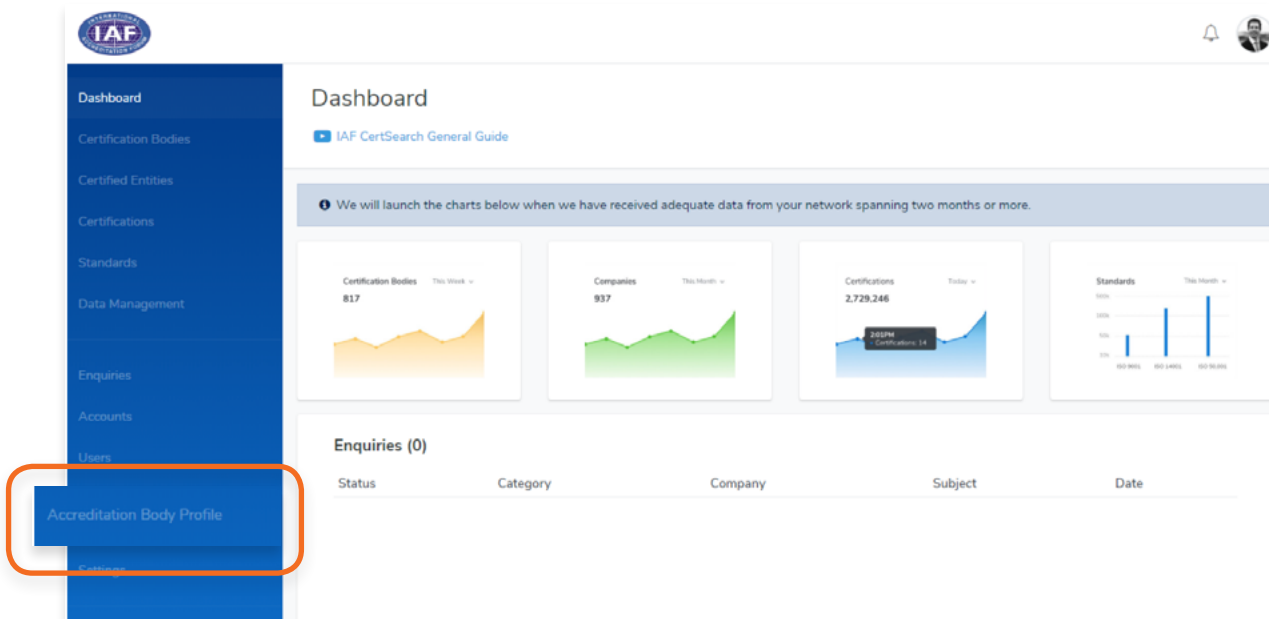
The image shows a modal dialog box titled "Invite User" with a close button (x) in the top right corner. Below the title bar, there is a label "Email Address" and a text input field containing the email address "testemail@domain.com". To the right of the input field is a blue button labeled "Send Invitation", which is highlighted with an orange rounded rectangle.

4. An invitation email will be sent to the user. Once the user activates, he/she will be able to access the account.

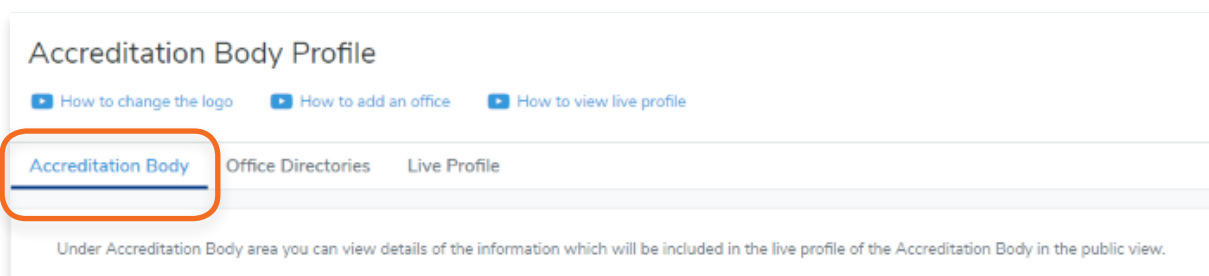
9. Accreditation Body Profile

9.1. How to View Accreditation Body Information

From your **dashboard**, click **Accreditation Body Profile** on the left navigation bar

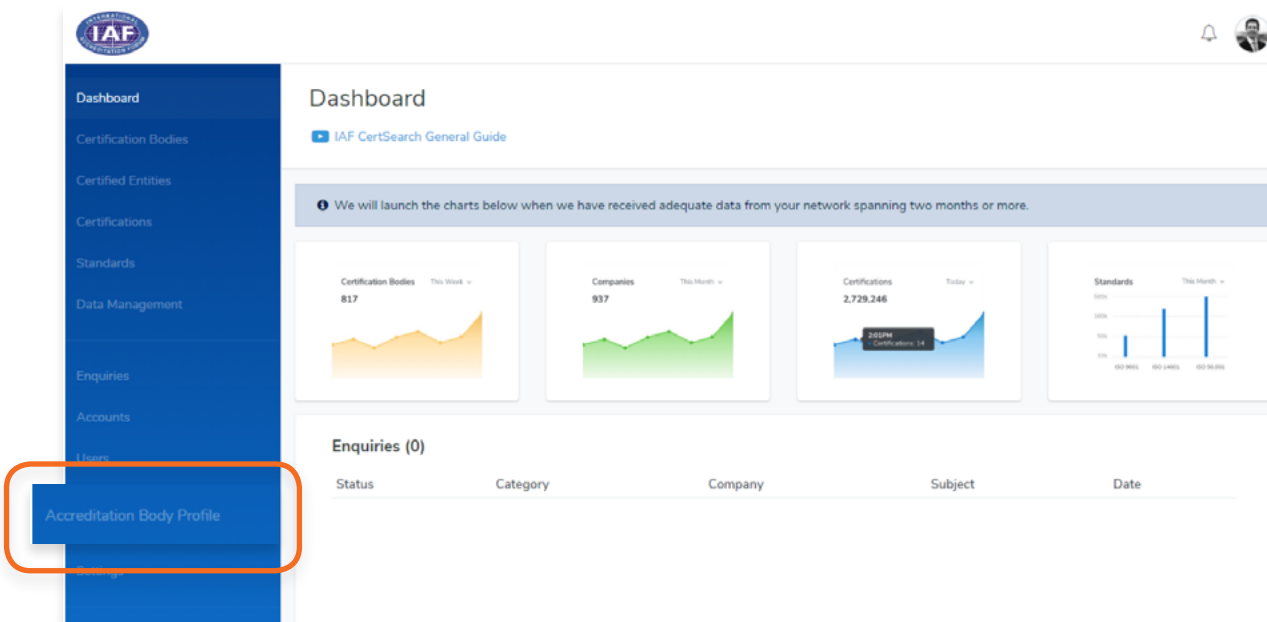


View the following : **Certification Body Information, Office Directory and Live Profile.**

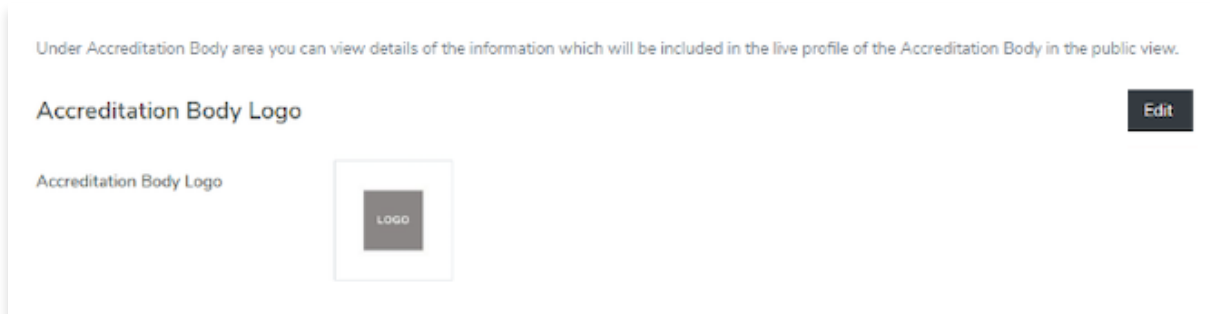


9.2. How to Edit Accreditation Body Logo

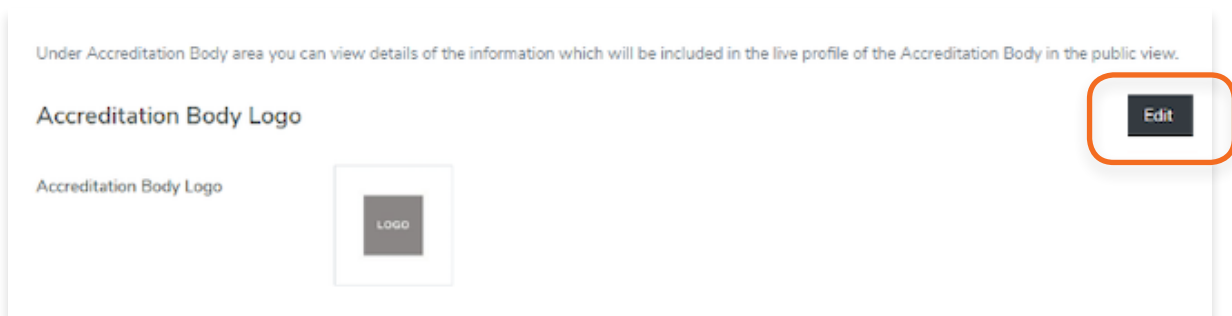
1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



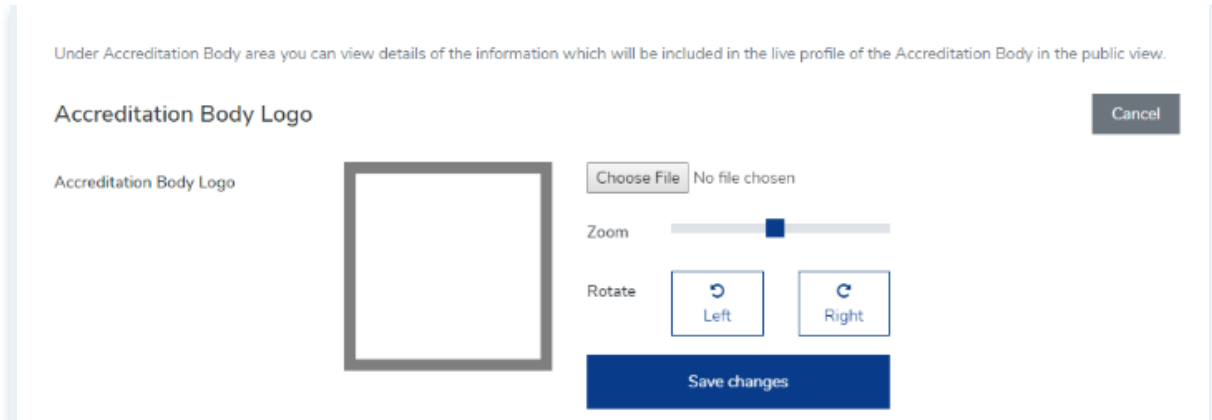
2. Select **Accreditation Body** in the top menu bar and scroll to the **Accreditation Body Logo** section.



3. Click **Edit**



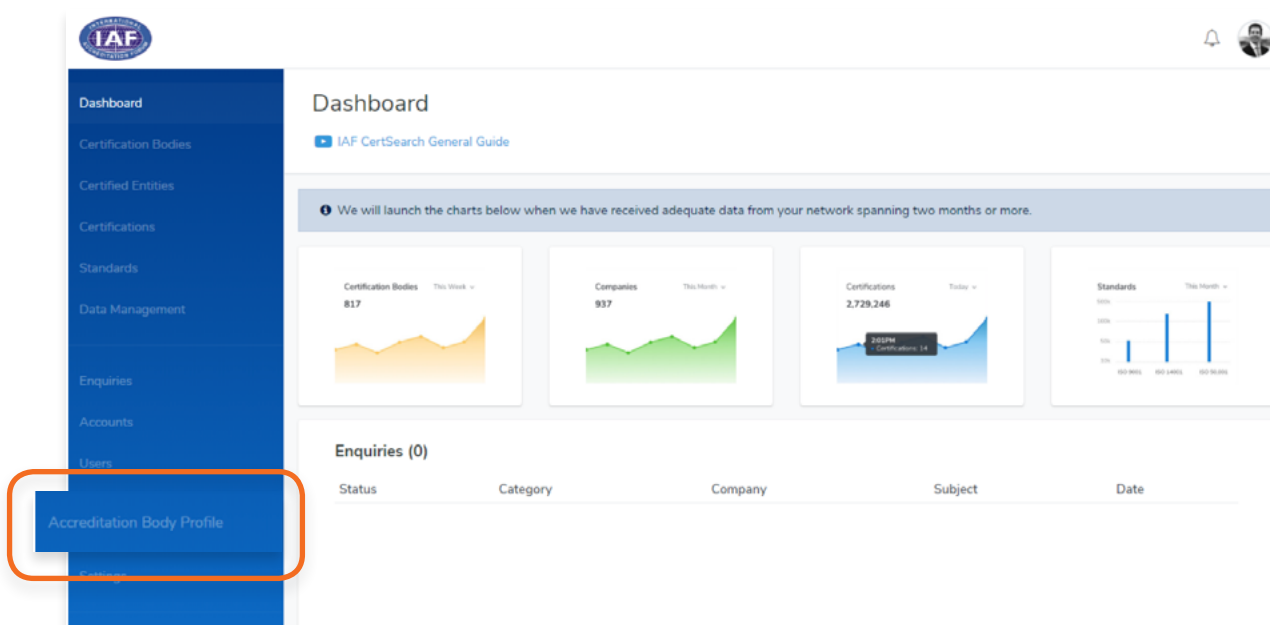
4. Click **Choose File** to select an image that you wish to use.
Zoom and **Rotate** functions are also available to adjust the logo image to fit.



5. Click **Save Changes** once done or click **Cancel** to revert changes.

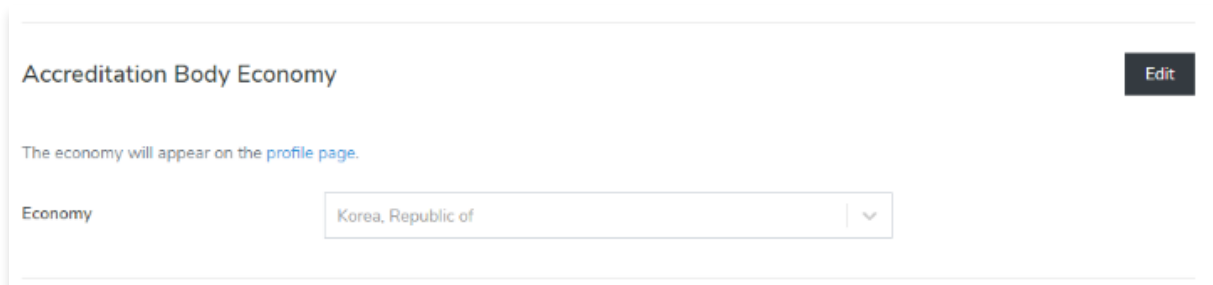
9.3. How to Edit Accreditation Body Economy/Country

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left, a blue navigation menu lists various options: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Accreditation Body Profile (highlighted with an orange box), and Certificates. The main content area is titled 'Dashboard' and includes a link to 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four charts: 'Certification Bodies' (This Week = 817), 'Companies' (This Month = 937), 'Certifications' (Today = 2,729,246), and 'Standards' (This Month = 100,000). At the bottom, there is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date.

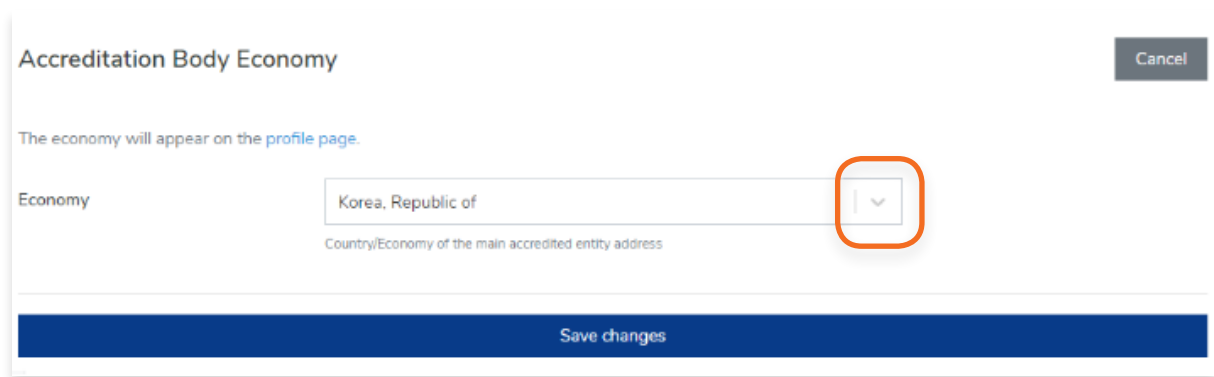
2. Select **Accreditation Body** in the top menu bar and scroll to the **Accreditation Body Economy** section.



The screenshot shows the 'Accreditation Body Economy' edit form. The title 'Accreditation Body Economy' is at the top left, and an 'Edit' button is at the top right. Below the title, a message reads: 'The economy will appear on the profile page.' The form contains a label 'Economy' and a dropdown menu with 'Korea, Republic of' selected.

3. Click **Edit**

4. Select the **Economy** from the drop down.

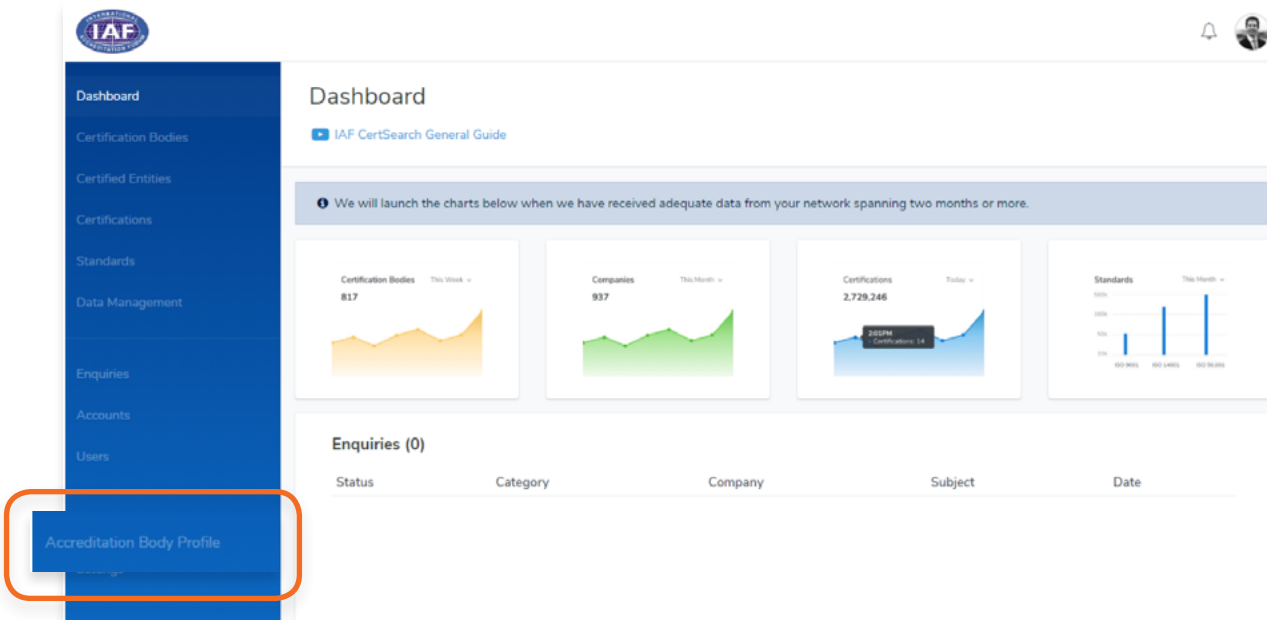


The screenshot shows a form titled "Accreditation Body Economy" with a "Cancel" button in the top right corner. Below the title, there is a note: "The economy will appear on the [profile page](#)." The form contains a label "Economy" and a dropdown menu. The dropdown menu is currently displaying "Korea, Republic of" and has a small downward arrow icon on the right side, which is circled in orange. Below the dropdown menu, there is a small text label: "Country/Economy of the main accredited entity address". At the bottom of the form, there is a blue button labeled "Save changes".

5. Click **Save changes** to save.

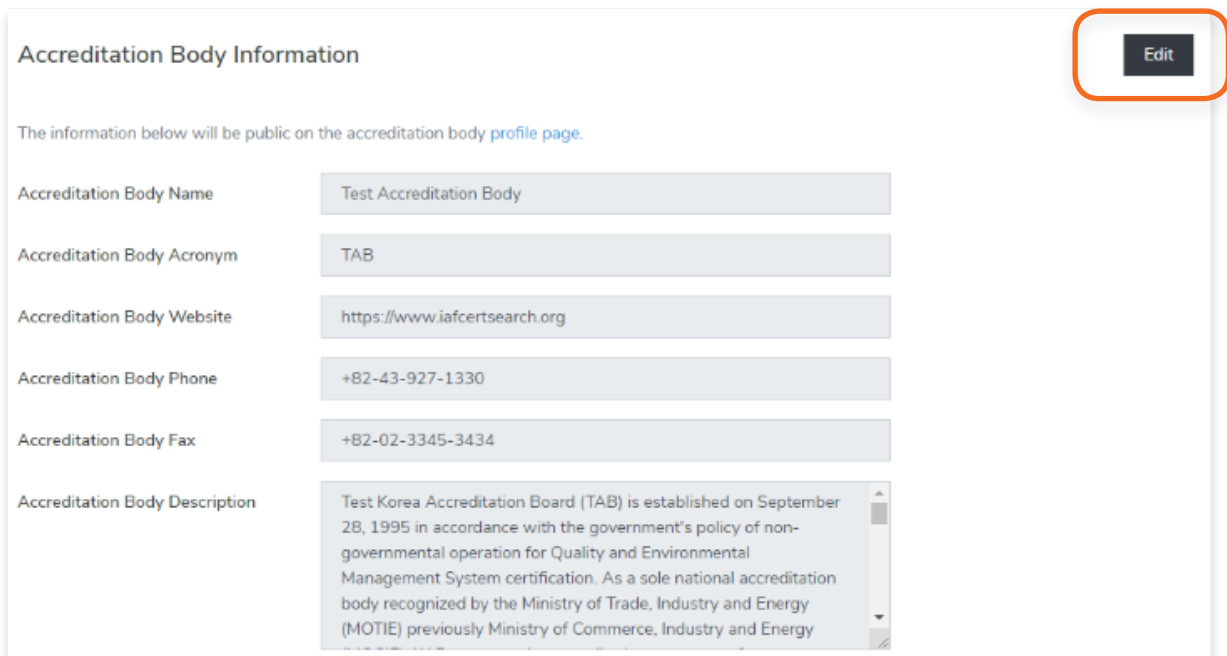
9.4. How to Edit Accreditation Body Information

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left, there is a vertical navigation menu with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, and Users. The 'Accreditation Body Profile' item is highlighted with an orange rectangular box. The main dashboard area displays several charts and a table. The charts include 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is a section for 'Enquiries (0)' with columns for Status, Category, Company, Subject, and Date.

2. Select **Accreditation Body** in the top menu bar and scroll to the **Accreditation Body Economy** section.



The screenshot shows the 'Accreditation Body Information' form. The form contains the following fields:

- Accreditation Body Name: Test Accreditation Body
- Accreditation Body Acronym: TAB
- Accreditation Body Website: https://www.iafcertsearch.org
- Accreditation Body Phone: +82-43-927-1330
- Accreditation Body Fax: +82-02-3345-3434
- Accreditation Body Description: Test Korea Accreditation Board (TAB) is established on September 28, 1995 in accordance with the government's policy of non-governmental operation for Quality and Environmental Management System certification. As a sole national accreditation body recognized by the Ministry of Trade, Industry and Energy (MOTIE) previously Ministry of Commerce, Industry and Energy

An orange rectangular box highlights the 'Edit' button in the top right corner of the form.

3. You can change your Accreditation Body Name, Accreditation Body Acronym, website information, phone, fax and Accreditation Body Description.

Include any country and area codes when editing your Phone and Fax details.

The description should be factual and limited to 200 words. The description will be on the profile page of the IAF CertSearch describing the organization.

Accreditation Body Information Cancel

The information below will be public on the accreditation body [profile page](#).

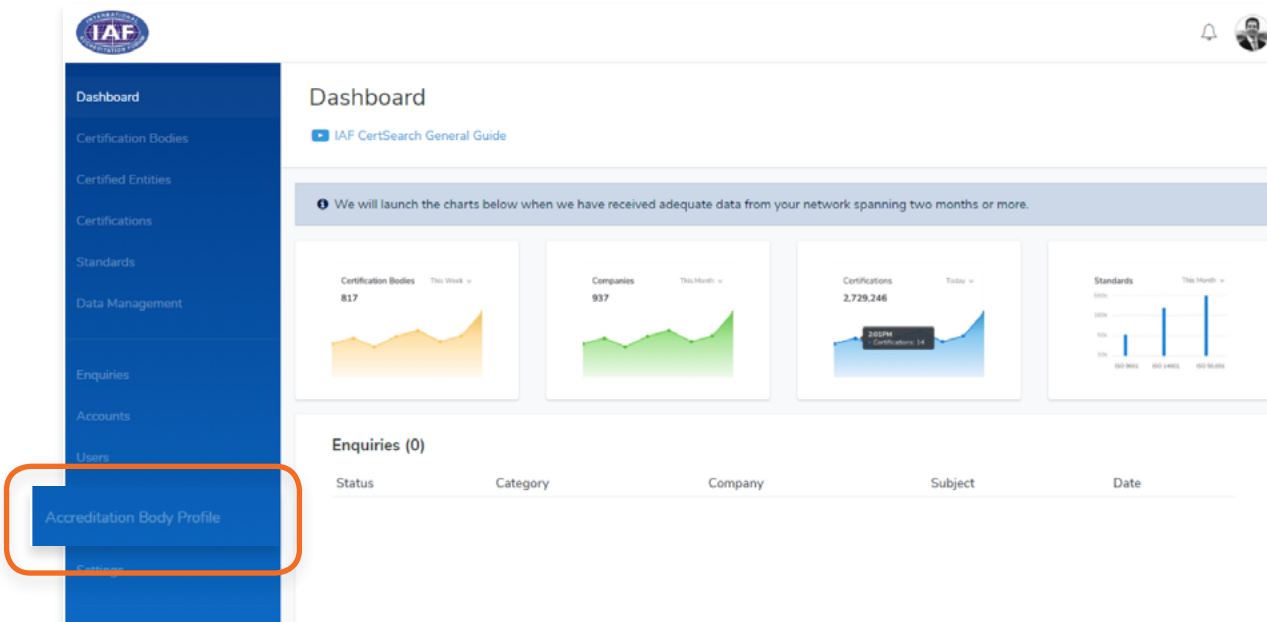
Accreditation Body Name	<input type="text" value="Test Accreditation Body"/>
Accreditation Body Acronym	<input type="text" value="TAB"/> <small>Accreditation Body Acronym</small>
Accreditation Body Website	<input type="text" value="https://www.iafcertsearch.org"/> <small>Accreditation Body Website must start with http:// or https://</small>
Accreditation Body Phone	<input type="text" value="+82-43-927-1330"/>
Accreditation Body Fax	<input type="text" value="+82-02-3345-3434"/>
Accreditation Body Description	<input type="text" value="Test Korea Accreditation Board (TAB) is established on September 28, 1995 in accordance with the government's policy of non-governmental operation for Quality and Environmental Management System certification. As a sole national accreditation body recognized by the Ministry of Trade, Industry and Energy (MOTIE) previously Ministry of Commerce, Industry and Energy"/> <small>A general description of the Accreditation Body. The description should be factual and limited to 200 words. The description will be on the profile page of the IAF CertSearch describing the organisation.</small>

Save changes

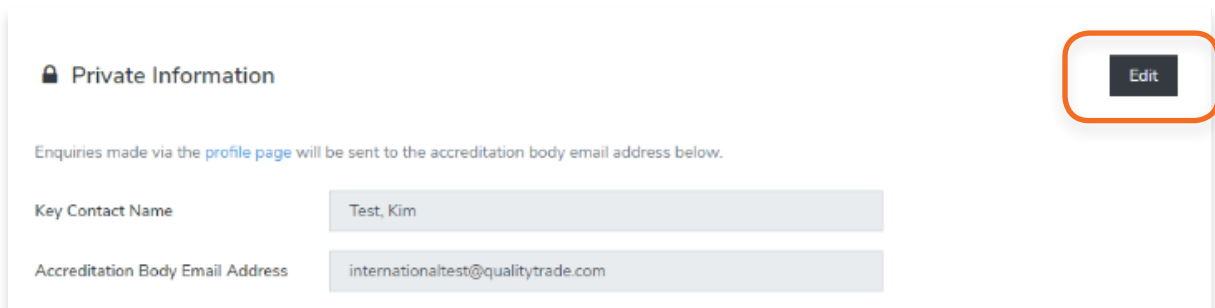
4. Click **Save changes** to save the information.

9.5. How to Edit Accreditation Body Private Information

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



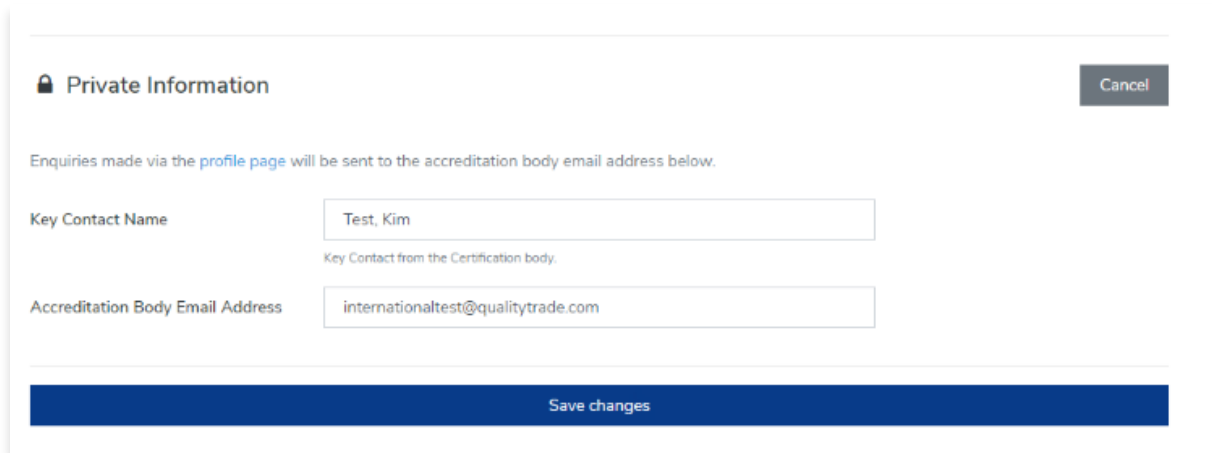
2. Select **Accreditation Body** in the top menu bar and scroll to the **Accreditation Body Information** section.



The screenshot shows the 'Private Information' section of the Accreditation Body profile. It features a lock icon and the title 'Private Information'. An 'Edit' button is highlighted with an orange box. Below the title, a message reads: 'Enquiries made via the profile page will be sent to the accreditation body email address below.' There are two input fields: 'Key Contact Name' with the value 'Test, Kim' and 'Accreditation Body Email Address' with the value 'internationaltest@qualitytrade.com'.

The private information section will have Key Contact Name and Accreditation Body Email Address. Enquiries made via the Live Profile will be sent to the accreditation body email address indicated in this section. Note that this is not public information.

Change the Key Contact Name and/or the Accreditation Body Email Address.

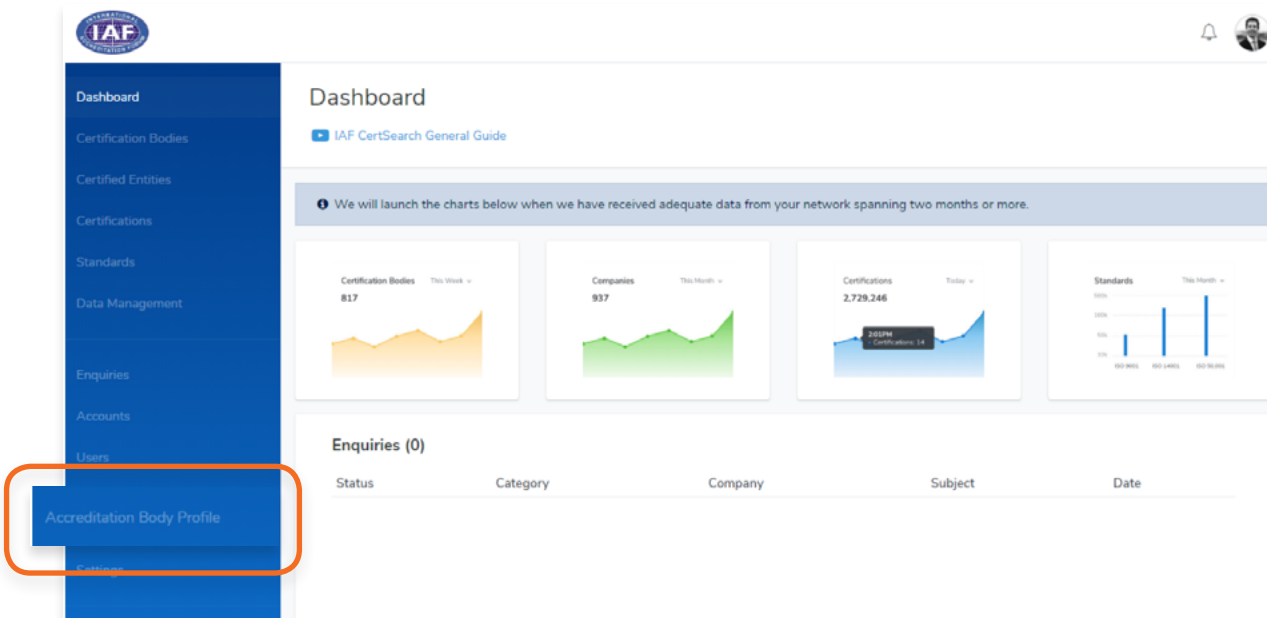


The screenshot shows a web form titled "Private Information" with a lock icon. In the top right corner, there is a "Cancel" button. Below the title, a note states: "Enquiries made via the [profile page](#) will be sent to the accreditation body email address below." There are two input fields: "Key Contact Name" with the value "Test, Kim" and "Accreditation Body Email Address" with the value "internationaltest@qualitytrade.com". Below the "Key Contact Name" field, there is a small text label: "Key Contact from the Certification body." At the bottom of the form, there is a prominent blue button labeled "Save changes".

3. Click **Save changes** to save the information.

9.6. How to View Office Directories

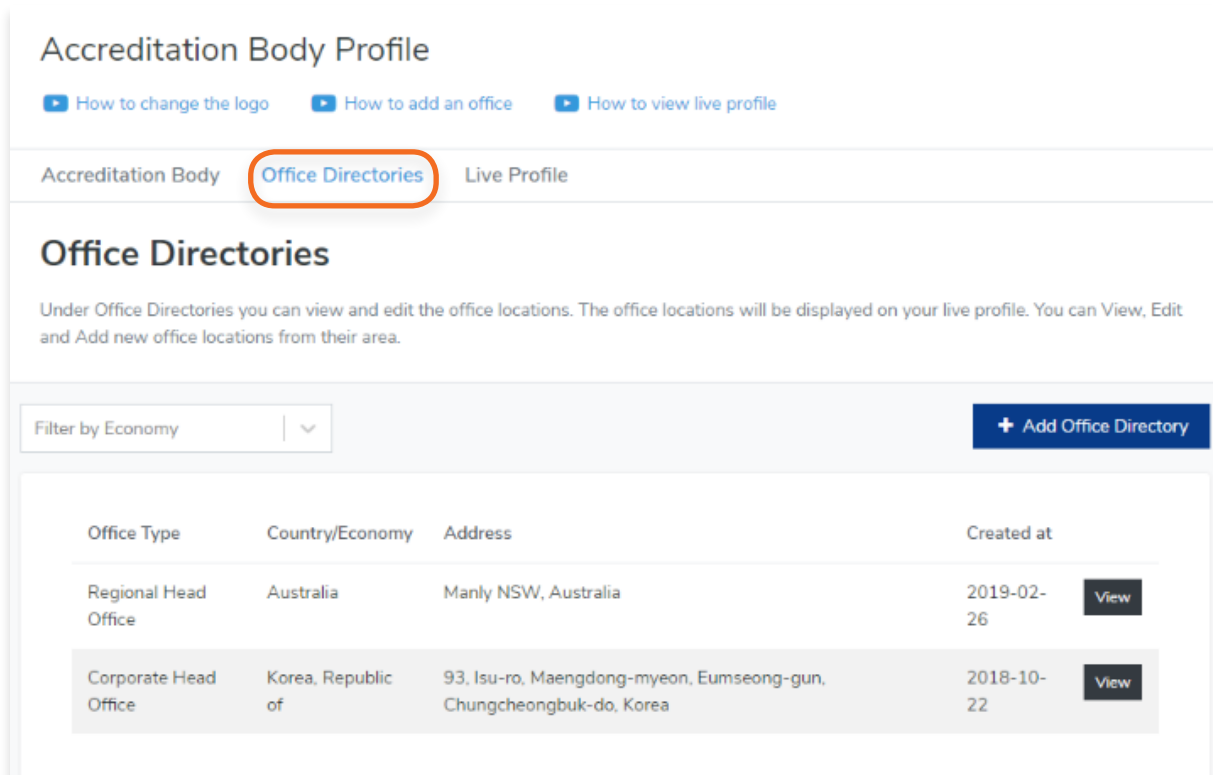
1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left, a blue navigation menu lists various options: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, and Accreditation Body Profile. The 'Accreditation Body Profile' option is highlighted with an orange rectangle. The main dashboard area displays several charts and a table for Enquiries (0).

2. Select **Office Directories** in the top menu bar.

Here you will see all the office locations. Office locations will be displayed on your live profile.

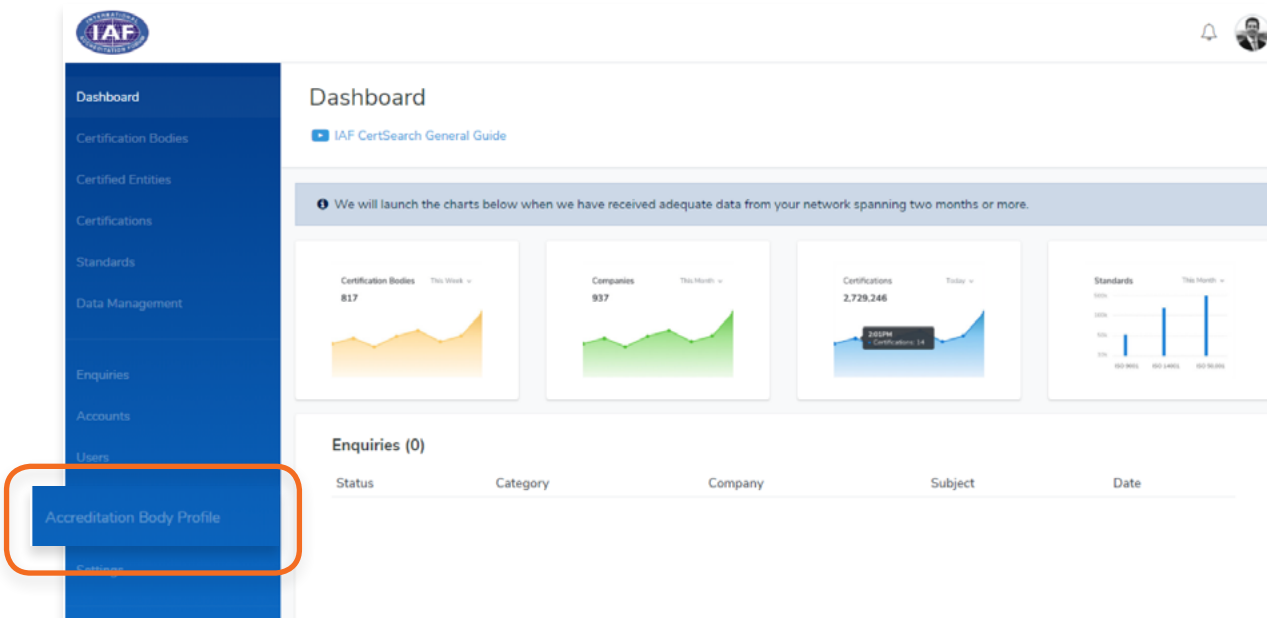


The screenshot shows the 'Accreditation Body Profile' page. At the top, there are three links: 'How to change the logo', 'How to add an office', and 'How to view live profile'. Below these, there are three tabs: 'Accreditation Body', 'Office Directories', and 'Live Profile'. The 'Office Directories' tab is selected and highlighted with an orange circle. The main content area is titled 'Office Directories' and contains a paragraph explaining the functionality. Below this, there is a filter dropdown for 'Filter by Economy' and a '+ Add Office Directory' button. A table displays the office locations with columns for Office Type, Country/Economy, Address, and Created at. Each row has a 'View' button.

Office Type	Country/Economy	Address	Created at
Regional Head Office	Australia	Manly NSW, Australia	2019-02-26 View
Corporate Head Office	Korea, Republic of	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungcheongbuk-do, Korea	2018-10-22 View

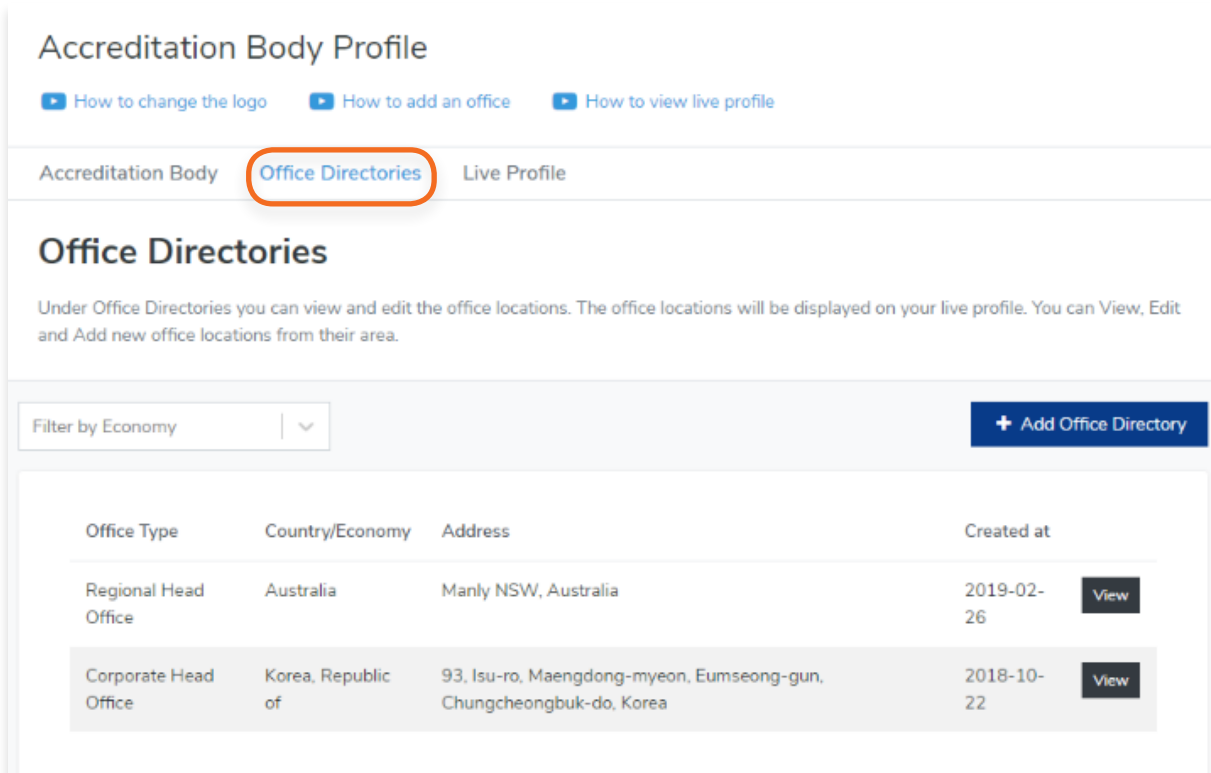
9.7. How to Edit Office Directories

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left, a blue navigation menu lists various options: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Accreditation Body Profile (highlighted with an orange box), and Certificates. The main content area displays a 'Dashboard' header with a link to 'IAF CertSearch General Guide'. Below this, a message states: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' Four charts are visible: 'Certification Bodies' (817, This Week), 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (This Month). At the bottom, there is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date.

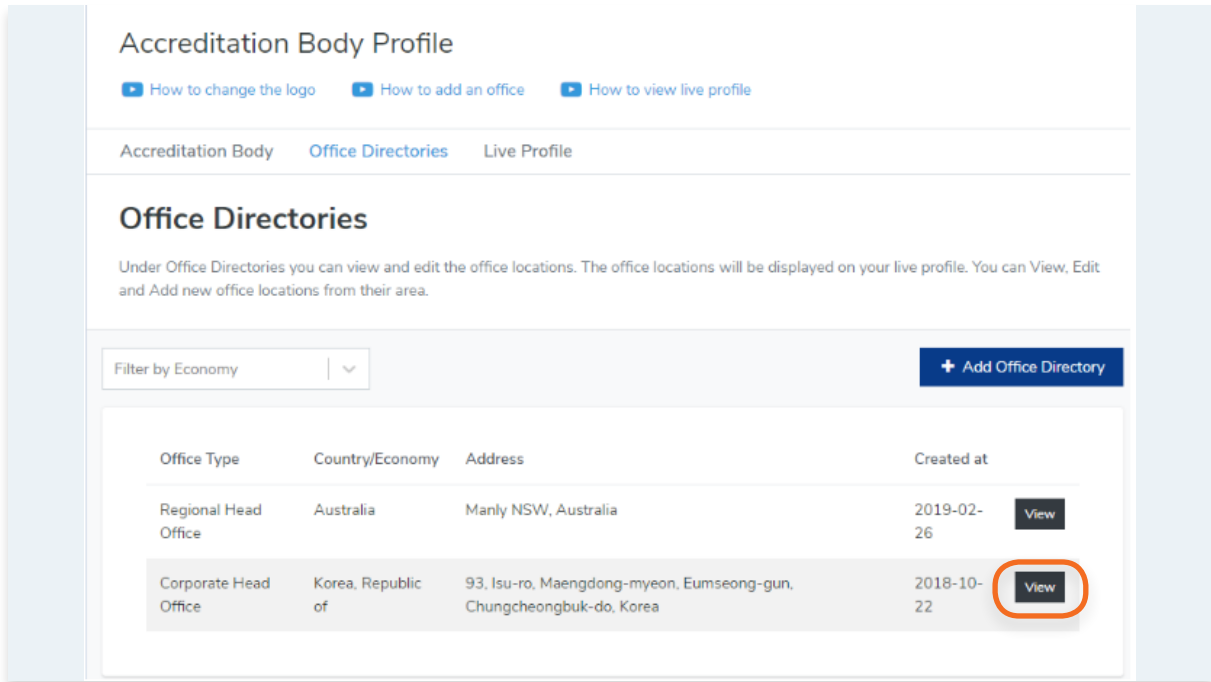
2. Select **Office Directories** in the top menu bar.



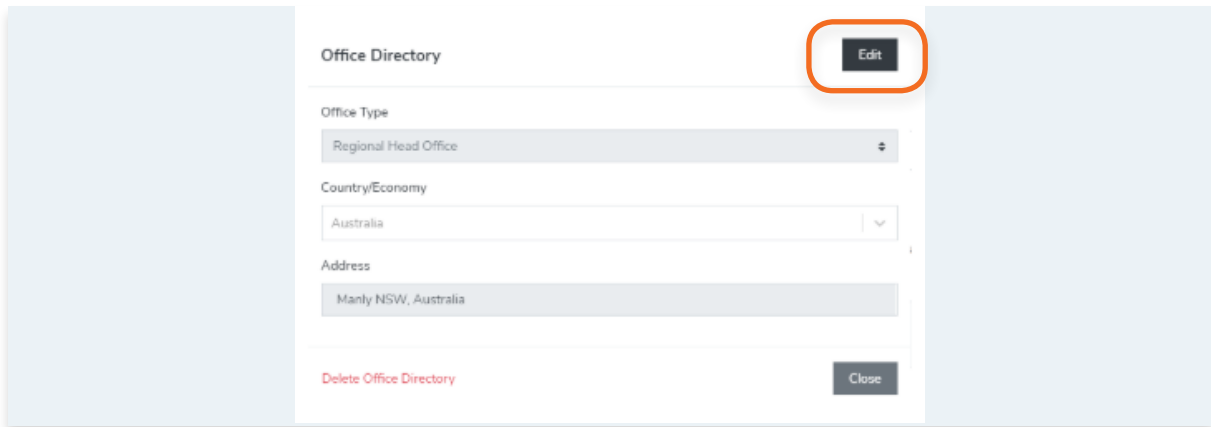
The screenshot shows the 'Accreditation Body Profile' page. At the top, there are three links: 'How to change the logo', 'How to add an office', and 'How to view live profile'. Below these, there are three tabs: 'Accreditation Body', 'Office Directories' (highlighted with an orange box), and 'Live Profile'. The main heading is 'Office Directories'. Below the heading, a paragraph explains: 'Under Office Directories you can view and edit the office locations. The office locations will be displayed on your live profile. You can View, Edit and Add new office locations from their area.' There is a 'Filter by Economy' dropdown menu and a '+ Add Office Directory' button. A table displays the following data:

Office Type	Country/Economy	Address	Created at	
Regional Head Office	Australia	Manly NSW, Australia	2019-02-26	View
Corporate Head Office	Korea, Republic of	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungcheongbuk-do, Korea	2018-10-22	View

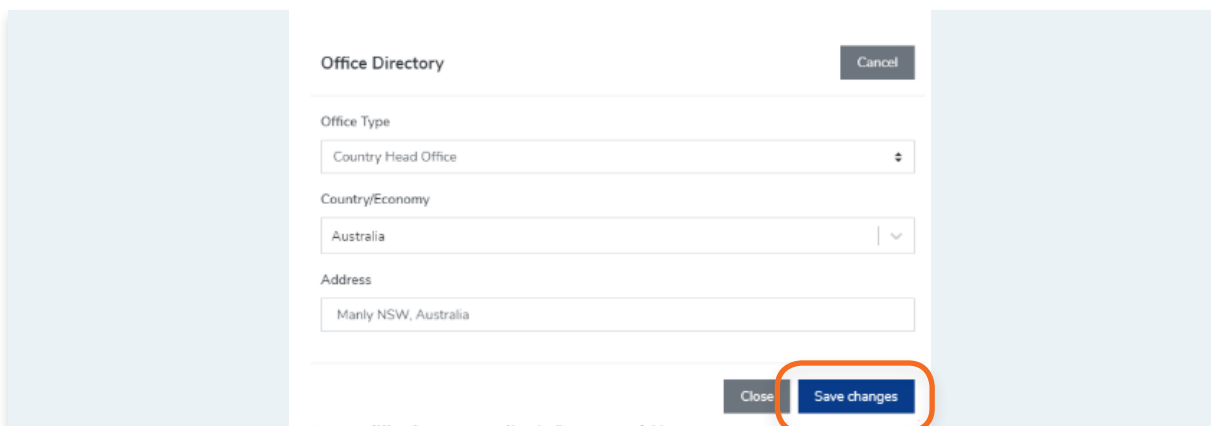
3. Find the **office location** you want to edit. Click **View**.



4. Click **Edit**

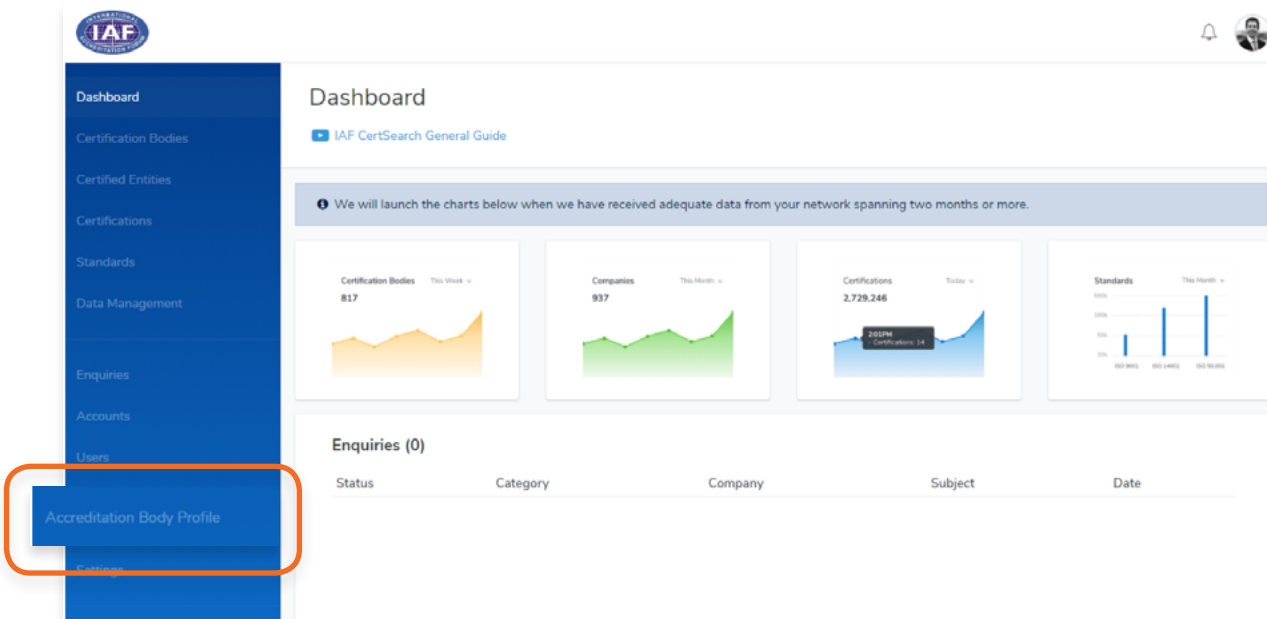


5. You can change the Office Type, Country/Economy, and Address. Click **Save changes**

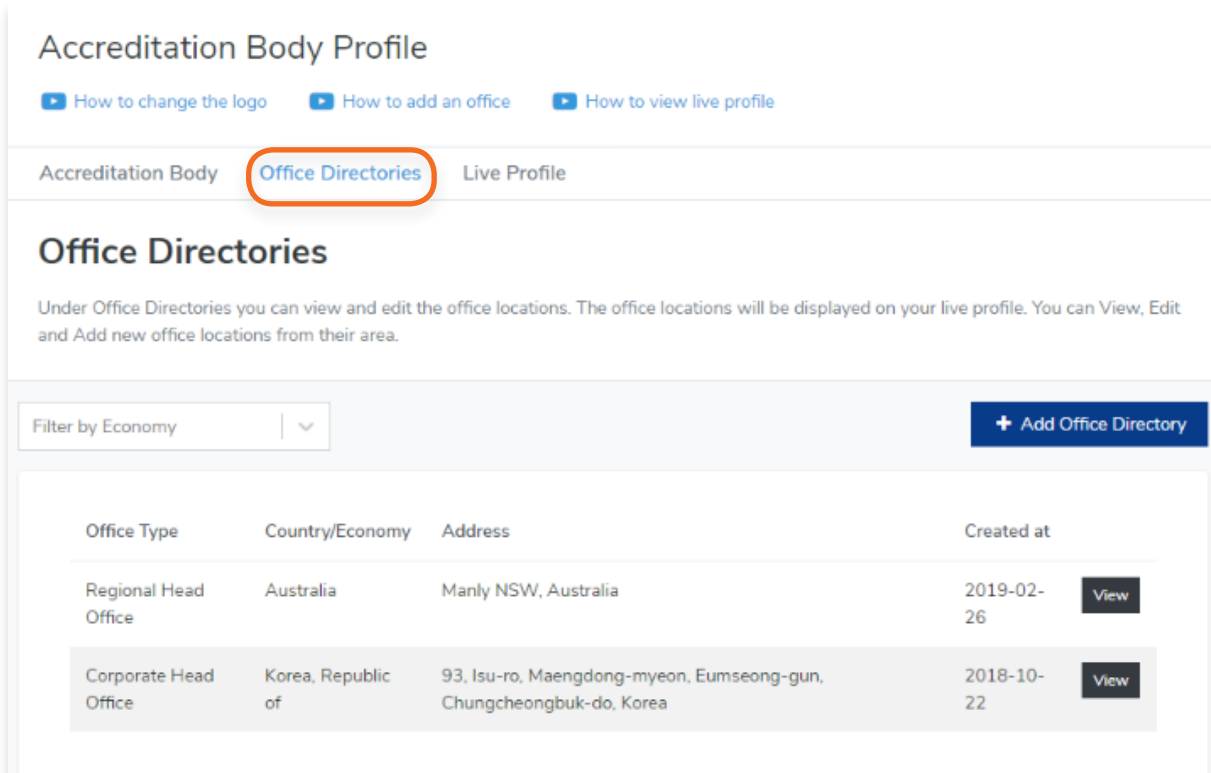


9.8. How to Delete Office Directories

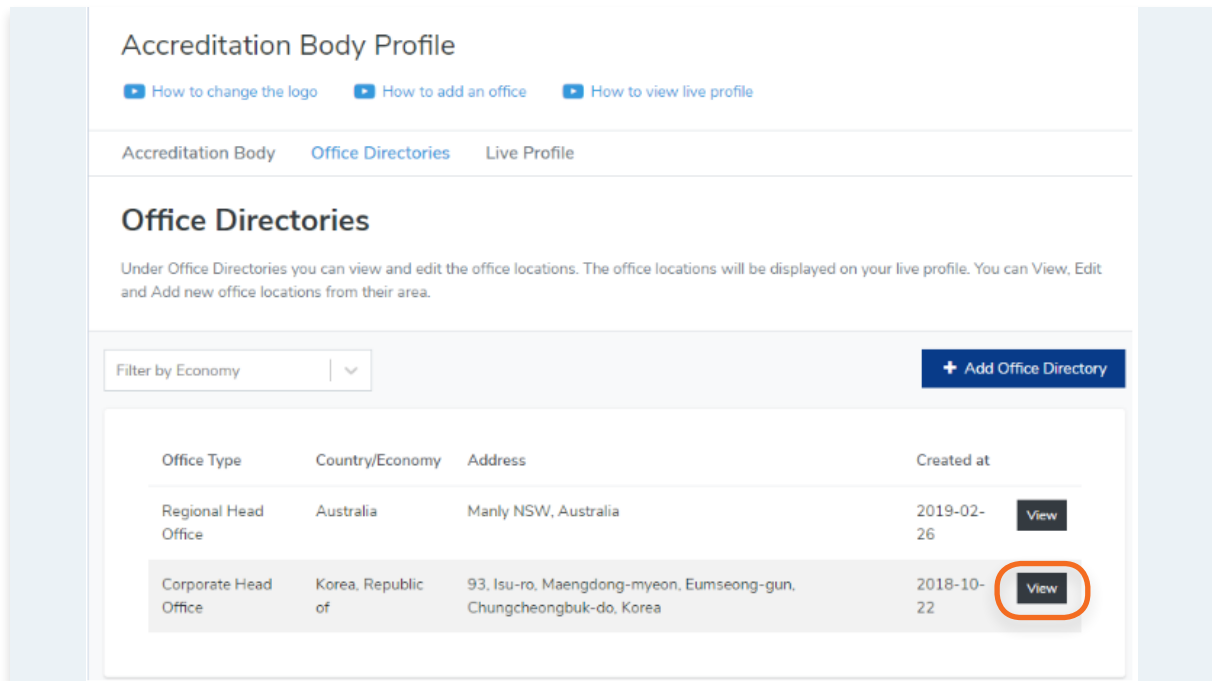
1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



2. Select **Office Directories** in the top menu bar.



3. Find the **office location** you want to delete. Click **View**



Accreditation Body Profile

[How to change the logo](#) [How to add an office](#) [How to view live profile](#)

Accreditation Body **Office Directories** Live Profile

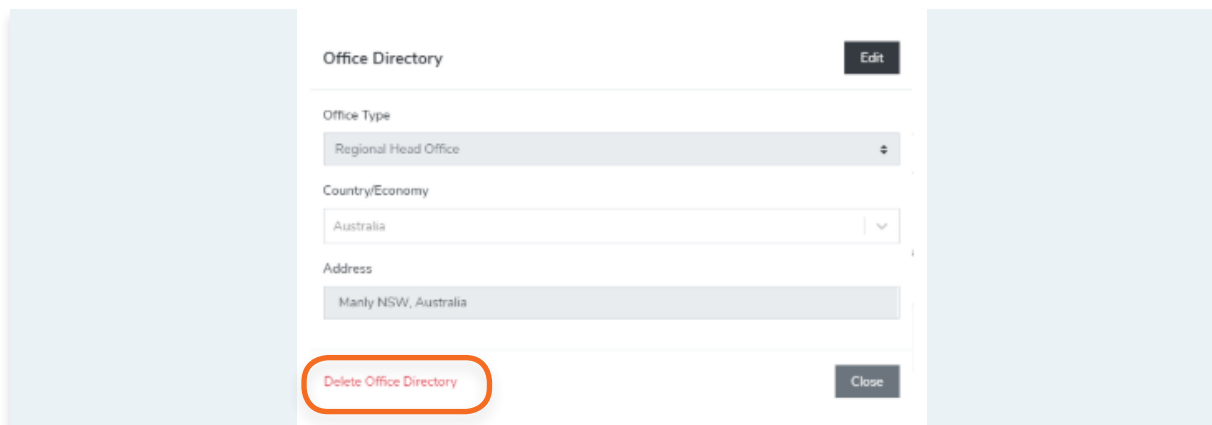
Office Directories

Under Office Directories you can view and edit the office locations. The office locations will be displayed on your live profile. You can View, Edit and Add new office locations from their area.

Filter by Economy [+ Add Office Directory](#)

Office Type	Country/Economy	Address	Created at	
Regional Head Office	Australia	Manly NSW, Australia	2019-02-26	View
Corporate Head Office	Korea, Republic of	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungcheongbuk-do, Korea	2018-10-22	View

4. Click **Delete Office Directory**



Office Directory [Edit](#)

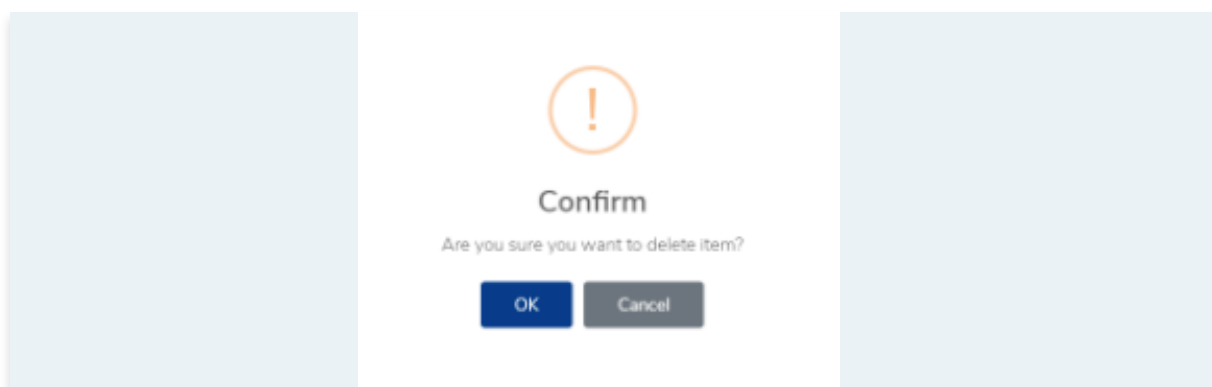
Office Type
Regional Head Office

Country/Economy
Australia

Address
Manly NSW, Australia

[Delete Office Directory](#) [Close](#)

5. A confirmation pop up will appear. Click **OK** to proceed.



!

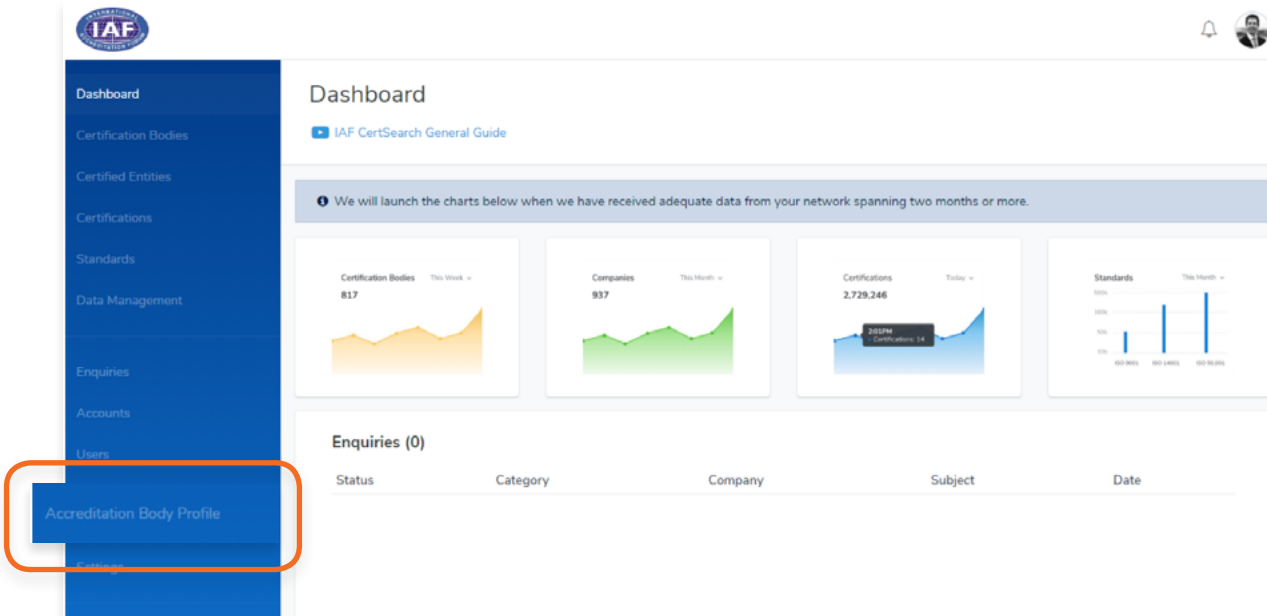
Confirm

Are you sure you want to delete item?

[OK](#) [Cancel](#)

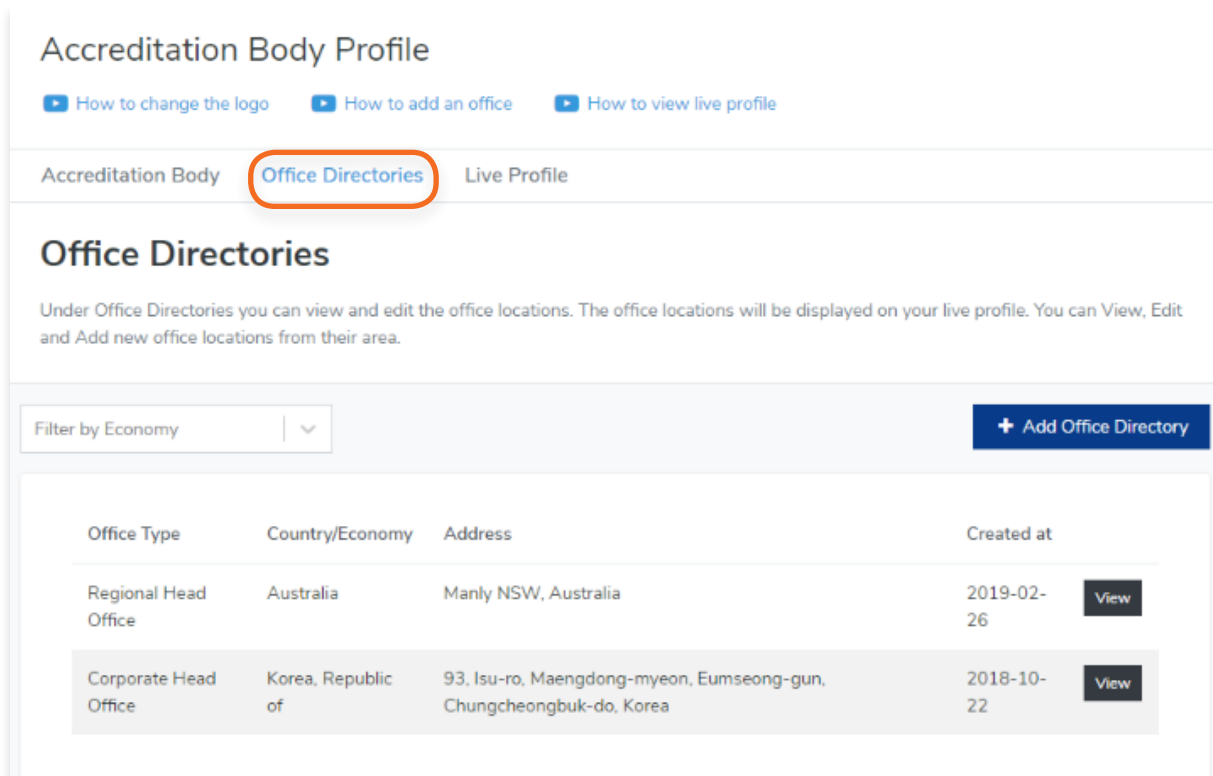
9.9. How to Add an Office Location

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left is a blue navigation menu with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Accreditation Body Profile (highlighted with an orange box), and another partially visible item. The main content area is titled 'Dashboard' and includes a link to 'IAF CertSearch General Guide'. Below this is a notification bar stating: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' There are four charts: 'Certification Bodies' (817), 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' table with columns for Status, Category, Company, Subject, and Date.

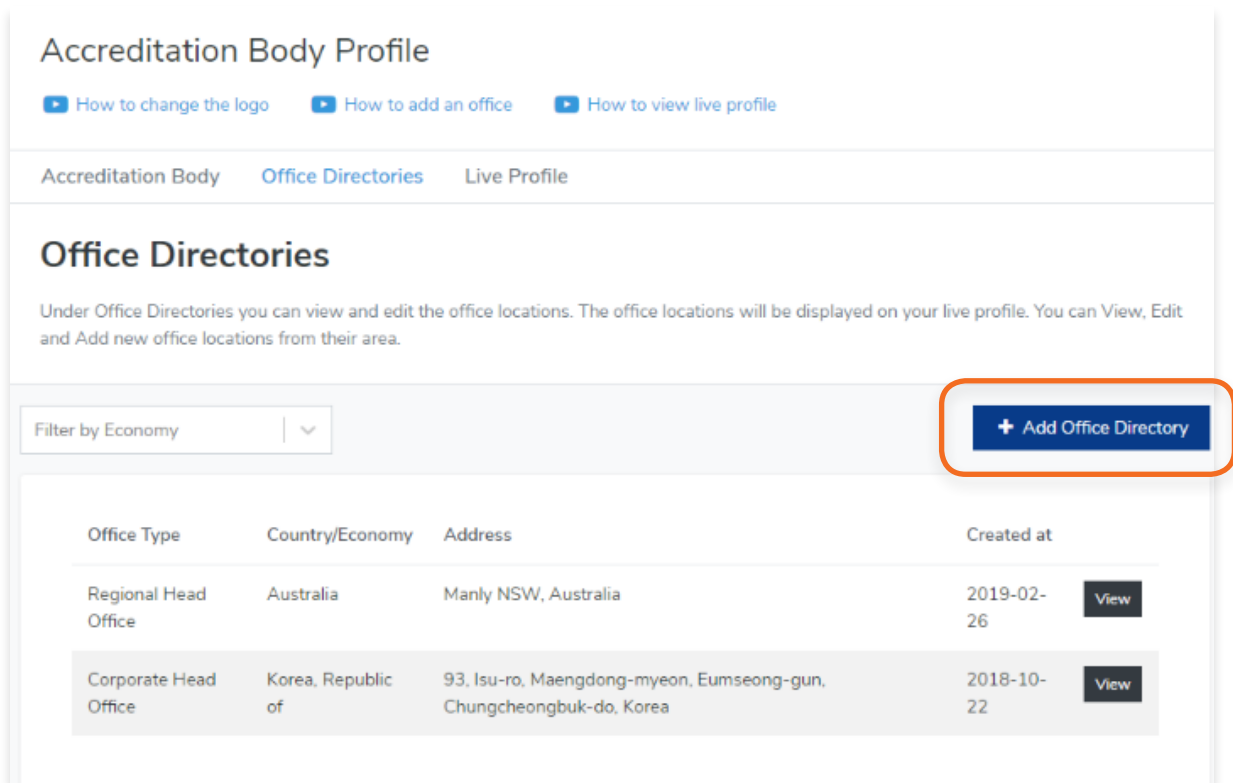
2. Select **Office Directories** in the top menu bar.



The screenshot shows the 'Accreditation Body Profile' page. At the top, there are three links: 'How to change the logo', 'How to add an office', and 'How to view live profile'. Below these are three tabs: 'Accreditation Body', 'Office Directories' (highlighted with an orange box), and 'Live Profile'. The main heading is 'Office Directories'. Below the heading is a paragraph: 'Under Office Directories you can view and edit the office locations. The office locations will be displayed on your live profile. You can View, Edit and Add new office locations from their area.' There is a 'Filter by Economy' dropdown menu and a '+ Add Office Directory' button. Below this is a table with the following data:

Office Type	Country/Economy	Address	Created at	
Regional Head Office	Australia	Manly NSW, Australia	2019-02-26	View
Corporate Head Office	Korea, Republic of	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungcheongbuk-do, Korea	2018-10-22	View

3. Click + Add Office Directory



Accreditation Body Profile

[How to change the logo](#) [How to add an office](#) [How to view live profile](#)

Accreditation Body **Office Directories** Live Profile

Office Directories

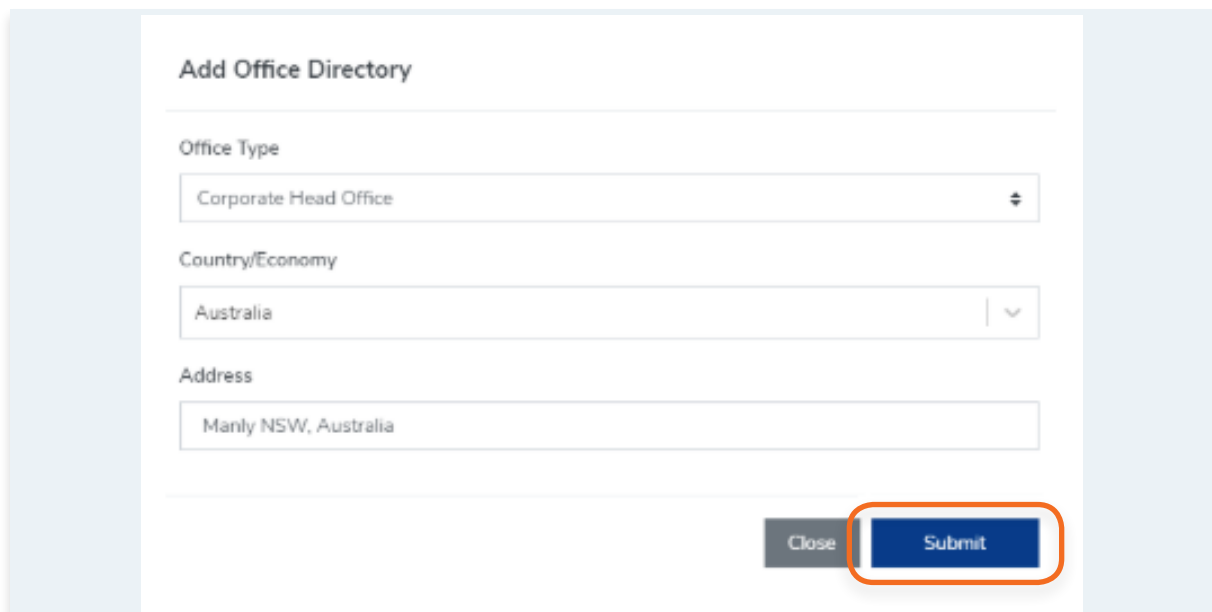
Under Office Directories you can view and edit the office locations. The office locations will be displayed on your live profile. You can View, Edit and Add new office locations from their area.

Filter by Economy | v

+ Add Office Directory

Office Type	Country/Economy	Address	Created at	
Regional Head Office	Australia	Manly NSW, Australia	2019-02-26	View
Corporate Head Office	Korea, Republic of	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungcheongbuk-do, Korea	2018-10-22	View

4. Select the **Office Type** and **Country/Economy** then enter the Address.



Add Office Directory

Office Type

Corporate Head Office

Country/Economy

Australia

Address

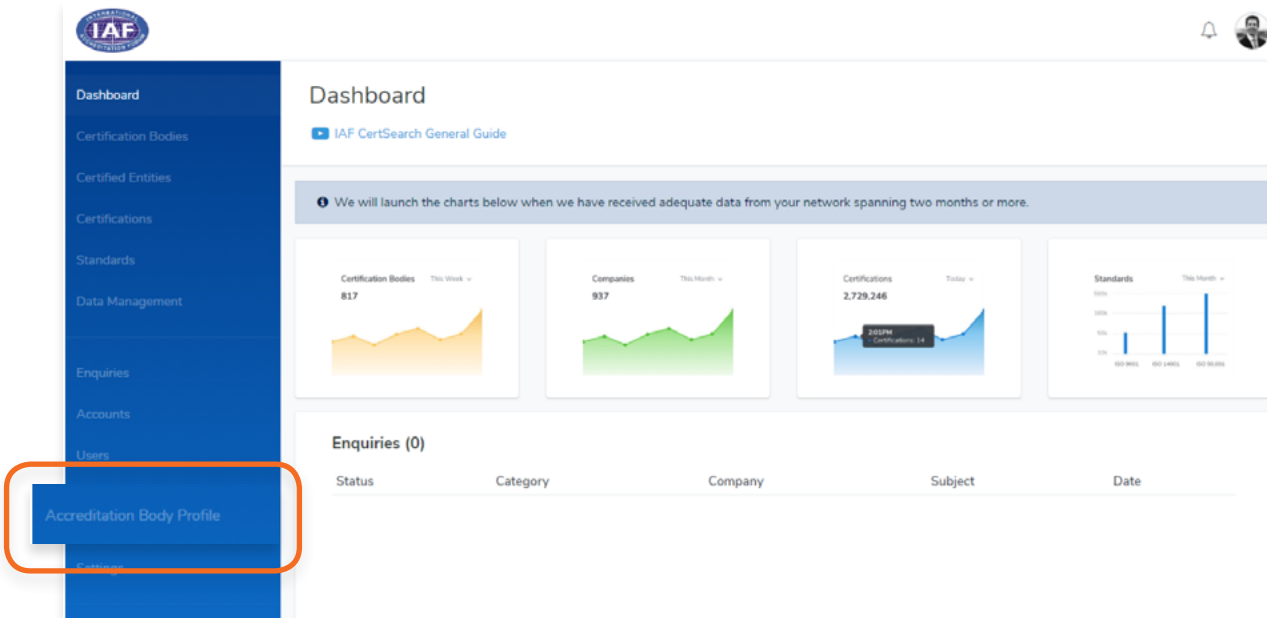
Manly NSW, Australia

[Close](#) **Submit**

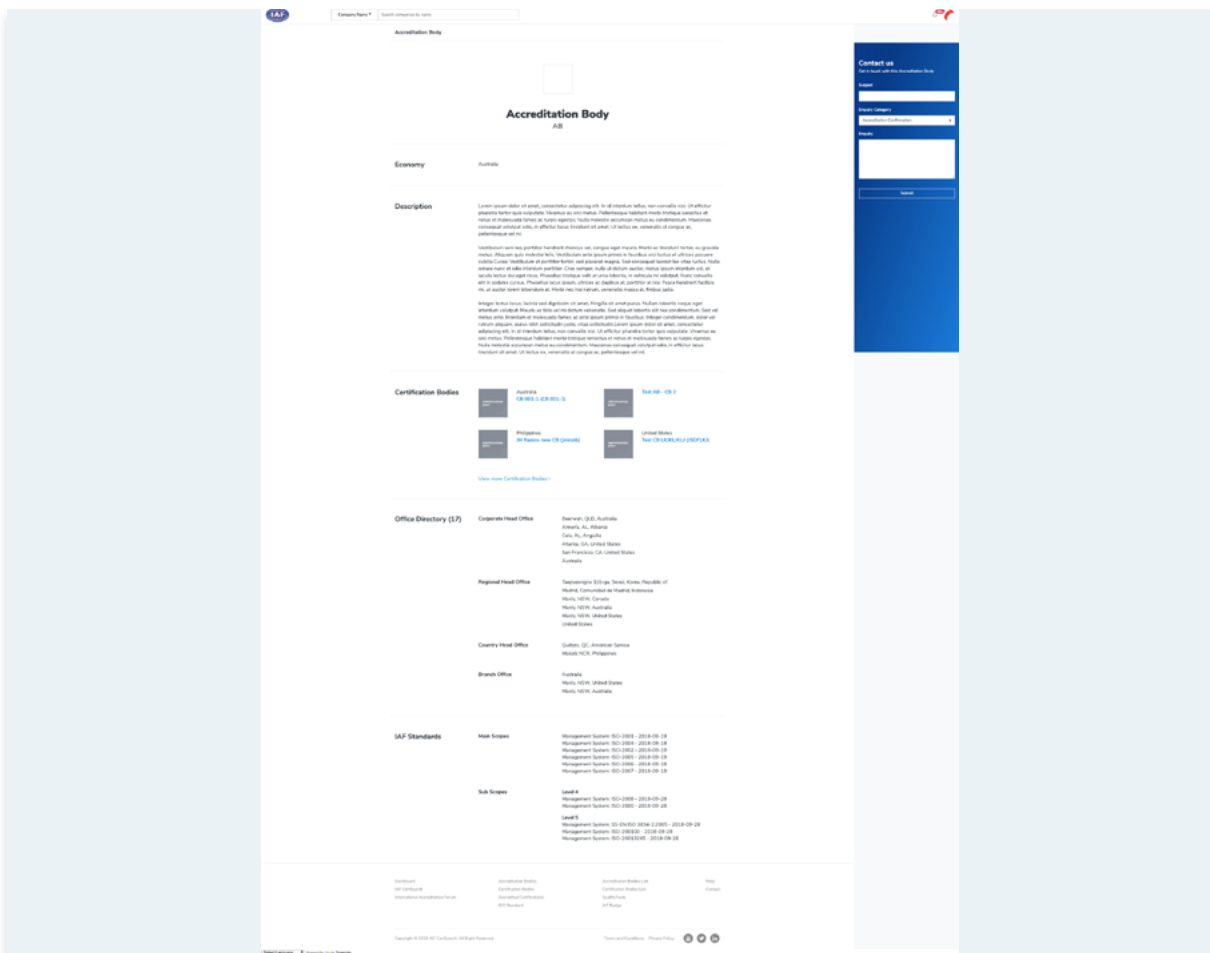
5. Click **Submit**

9.10. How to View the Live Profile of the Accreditation Body

1. From the **Dashboard**, click **Accreditation Body Profile** in the left hand navigation.



2. Select **Live Profile** in the top menu bar. This is how your profile will appear on the public site.



9.11. How to Change the Information Shown in the Live Profile

View the step by step guide below or watch the video guide here:

<https://youtu.be/gGjnoTpigPA>

To change the information shown in the Live Profile, go to:

[9.2 How to edit Accreditation Body Logo](#)

[9.3 How to edit Accreditation Body Economy/Country](#)

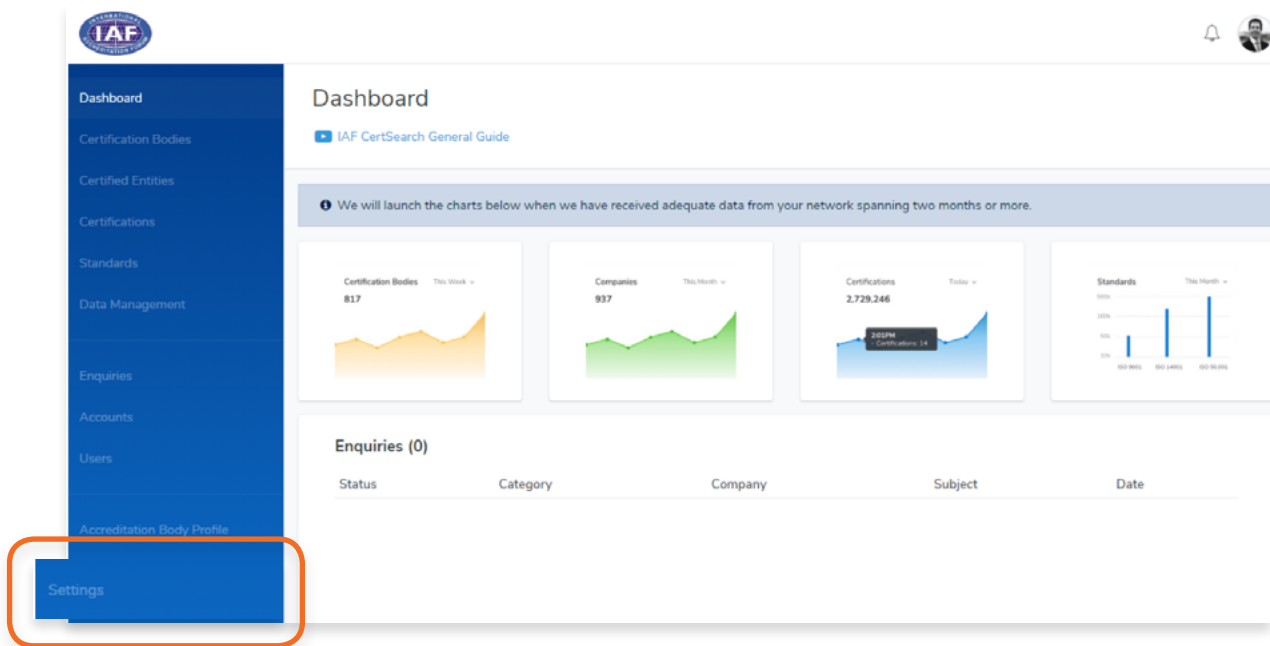
[9.4 How to edit Accreditation Body Information](#)

Changes made in these sections will reflect in your Live Profile.

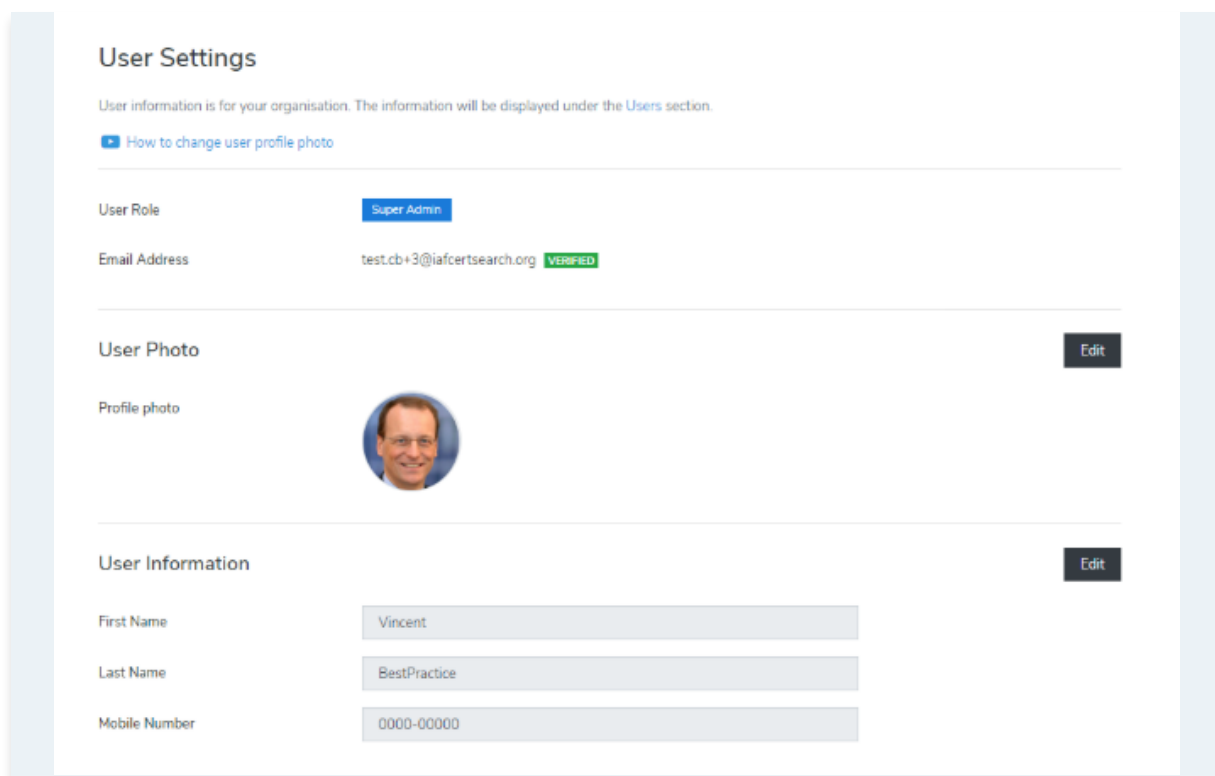
10. Settings

10.1. How to View User Settings

1. From your **dashboard**, click **Settings** on the left navigation bar



2. View the **User Role, Email Address, User Photo, and User Information** of the user account.



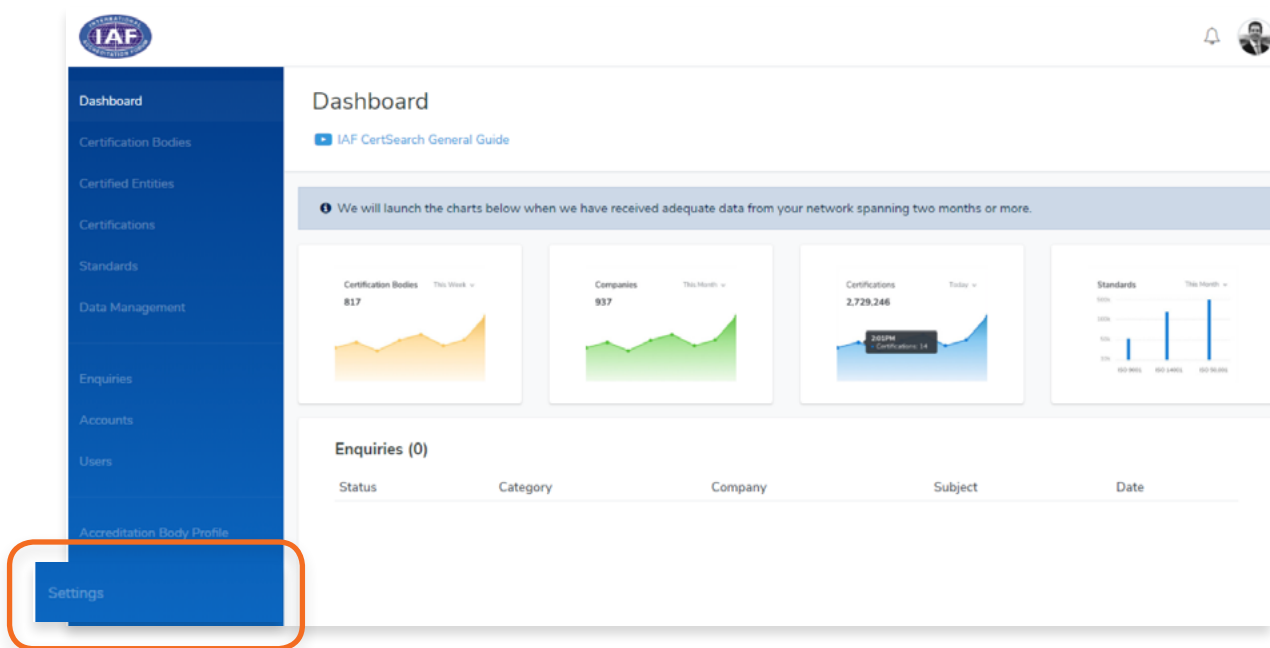
10.2. How to Edit User Photo

View the step by step guide below or watch the video guide here:

<https://youtu.be/yNxSzwltEml>

You can add or change your user photo.

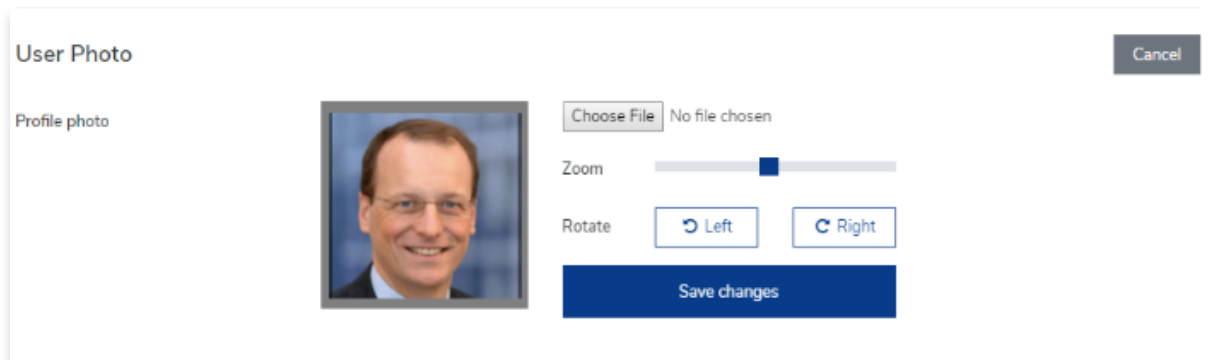
1. From your **dashboard**, click **Settings** on the left navigation bar



2. Click **Edit** in the User Photo section



3. Click **Choose File** to select an image that you wish to use.
Zoom and Rotate functions are also available to properly adjust the user image.

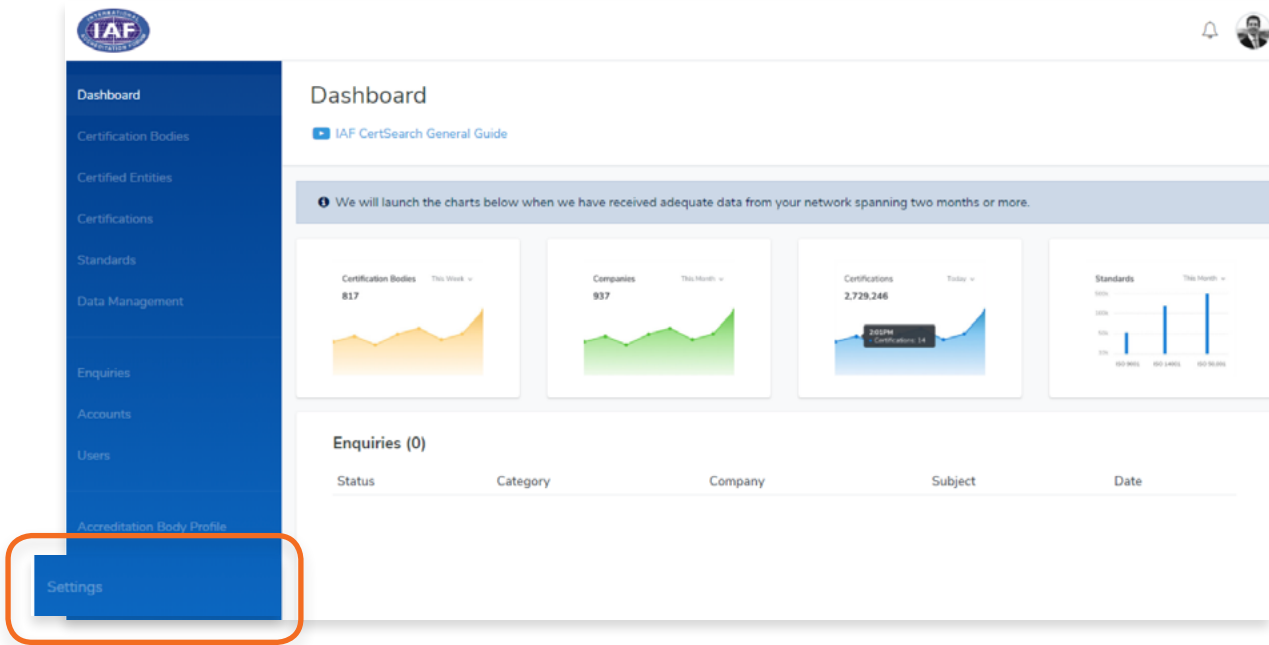


4. Click **Save Changes**.

10.3. How to Edit User Information

You can add or change your First Name, Last Name, and Phone number.

1. From your **dashboard**, click **Settings** on the left navigation bar



2. Click **Edit** in the User Information section

The screenshot shows the 'User Information' form. It contains three input fields: 'First Name' with the value 'Vincent', 'Last Name' with the value 'BestPractice', and 'Mobile Number' with the value '0000-00000'. In the top right corner of the form, there is a dark grey button labeled 'Edit', which is highlighted with an orange rectangular box.

3. Change the First Name, Last Name, and Mobile Number.

The screenshot shows the 'User Information' form in an edit mode. It contains three input fields: 'First Name' with the value 'Vincent', 'Last Name' with the value 'BestPractice', and 'Mobile Number' with the value '0000-00000'. In the top right corner, there is a dark grey button labeled 'Cancel'. At the bottom of the form, there is a dark blue button labeled 'Save changes', which is highlighted with an orange rectangular box.

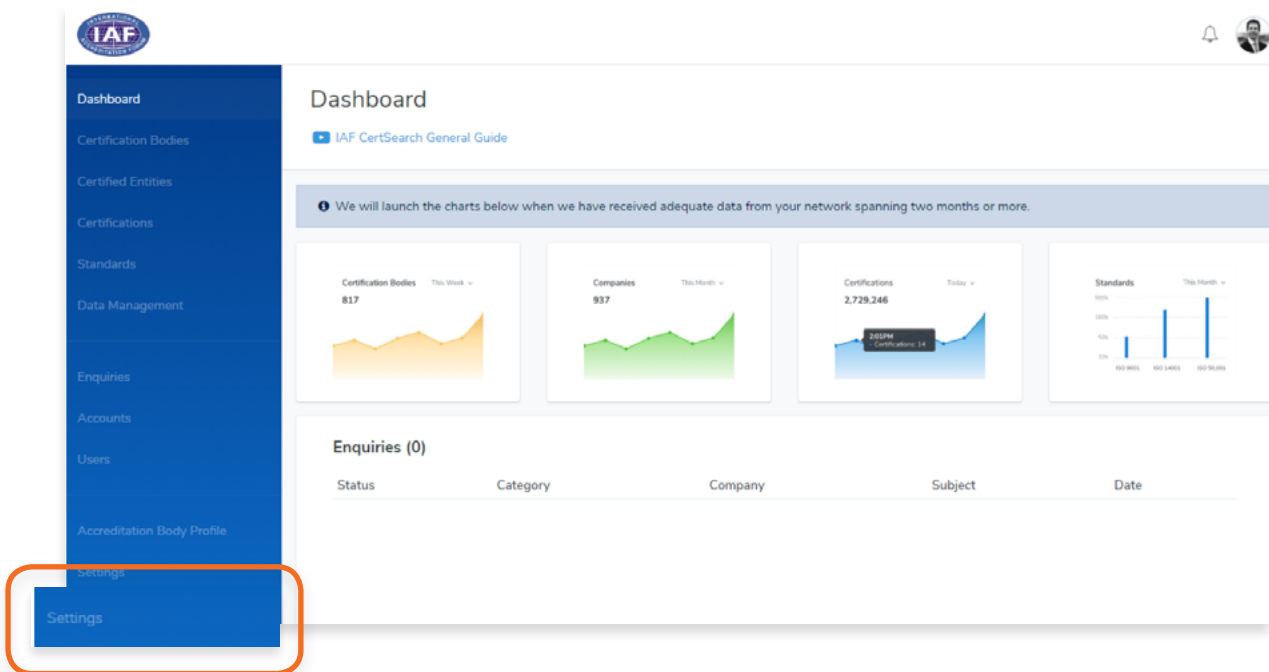
4. Click **Save Changes**

10.4. How to Change Security Settings

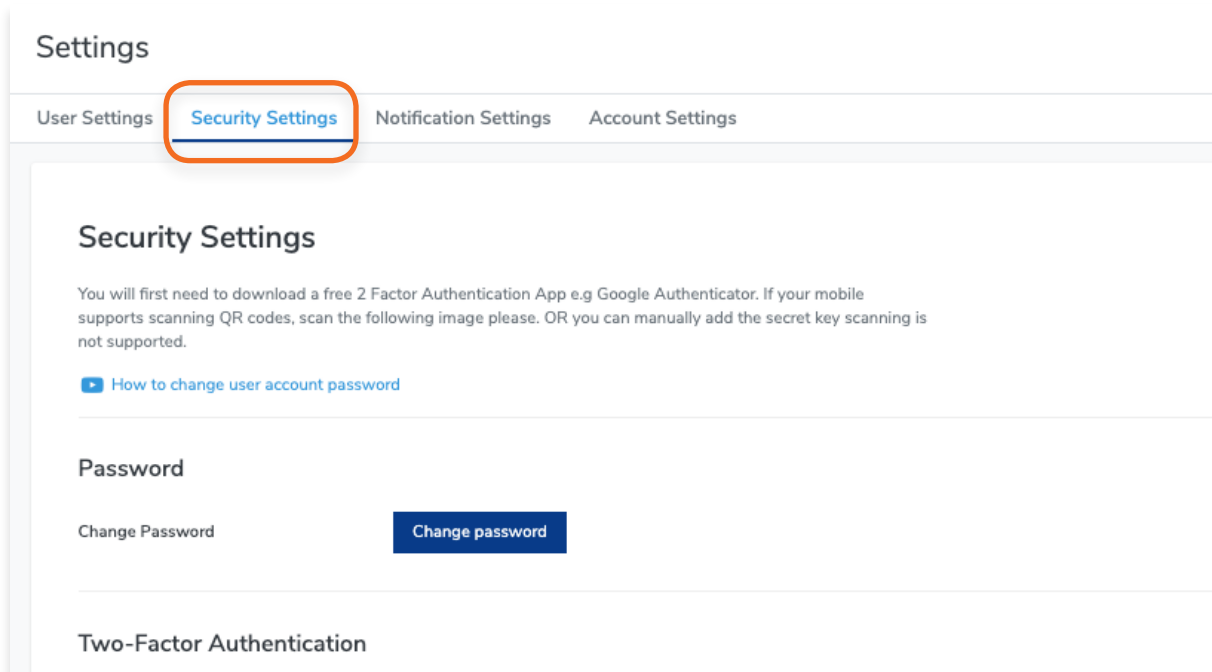
10.4.1. How to change the password

You can add or change your First Name, Last Name, and Phone number.

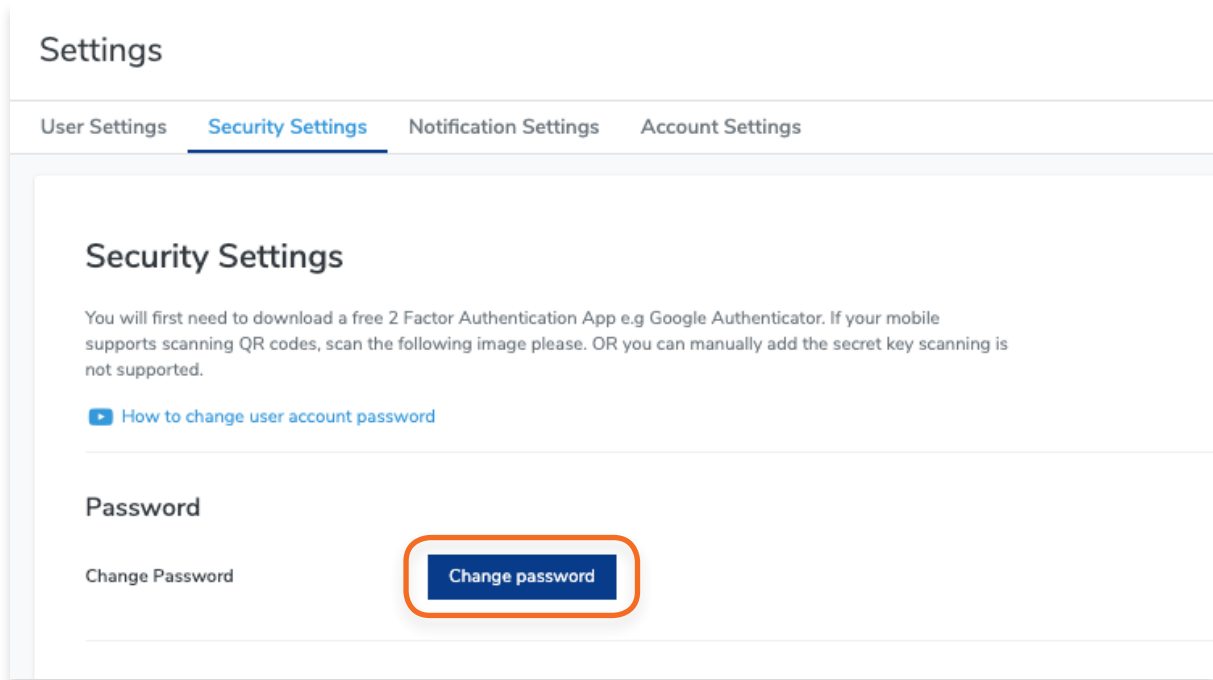
1. From your **dashboard**, click **Settings** on the left navigation bar



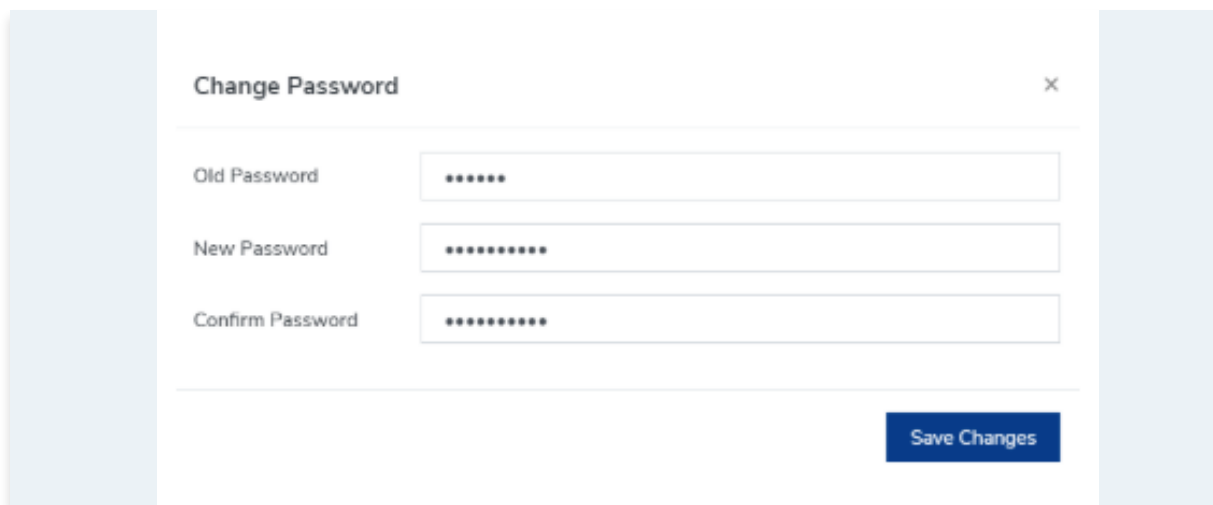
2. Click **Security Settings** in the menu bar.



3. Click **Change password**



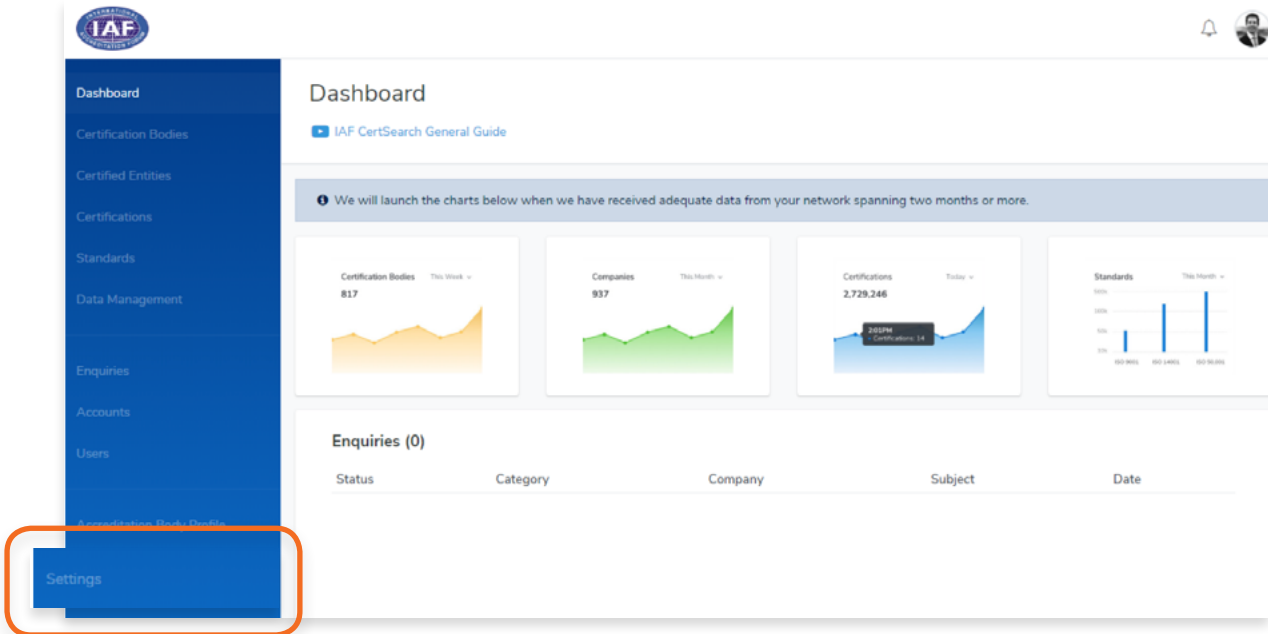
4. Type in the old password, the new password, and confirm password. Click **Save Changes**.



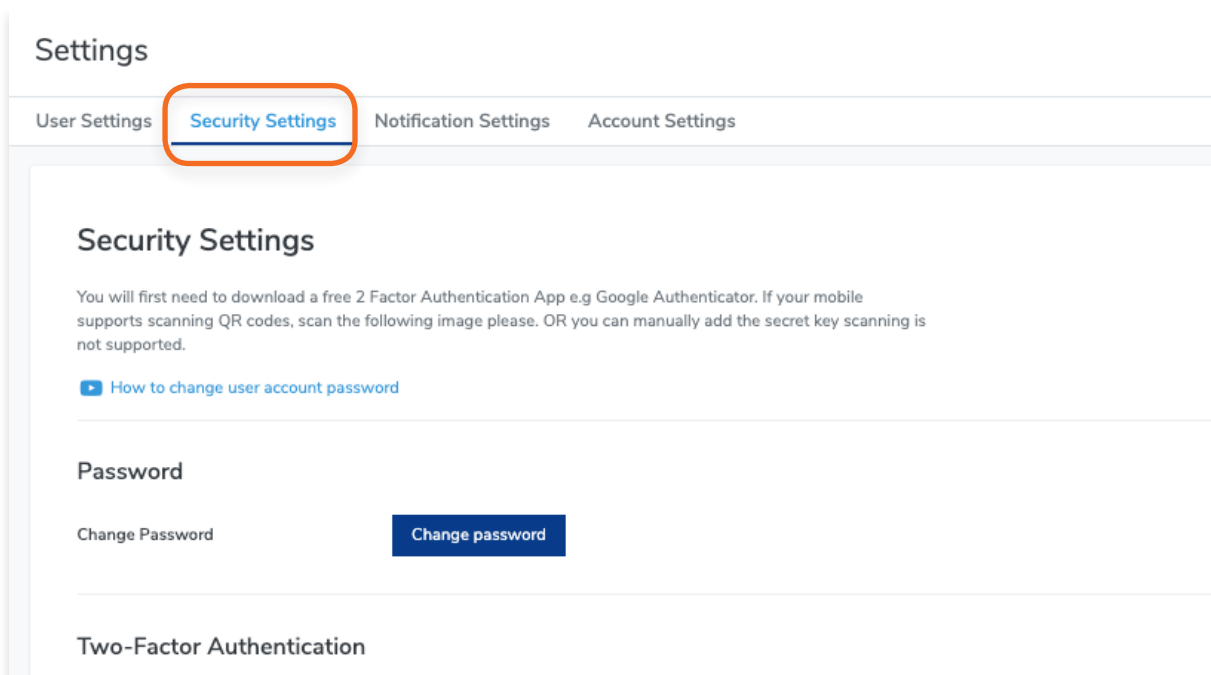
10.4.2. How to Apply the 2-Factor Authentication

You will first need to download a 2-Factor Authentication App e.g Google Authenticator on your mobile to use this feature.

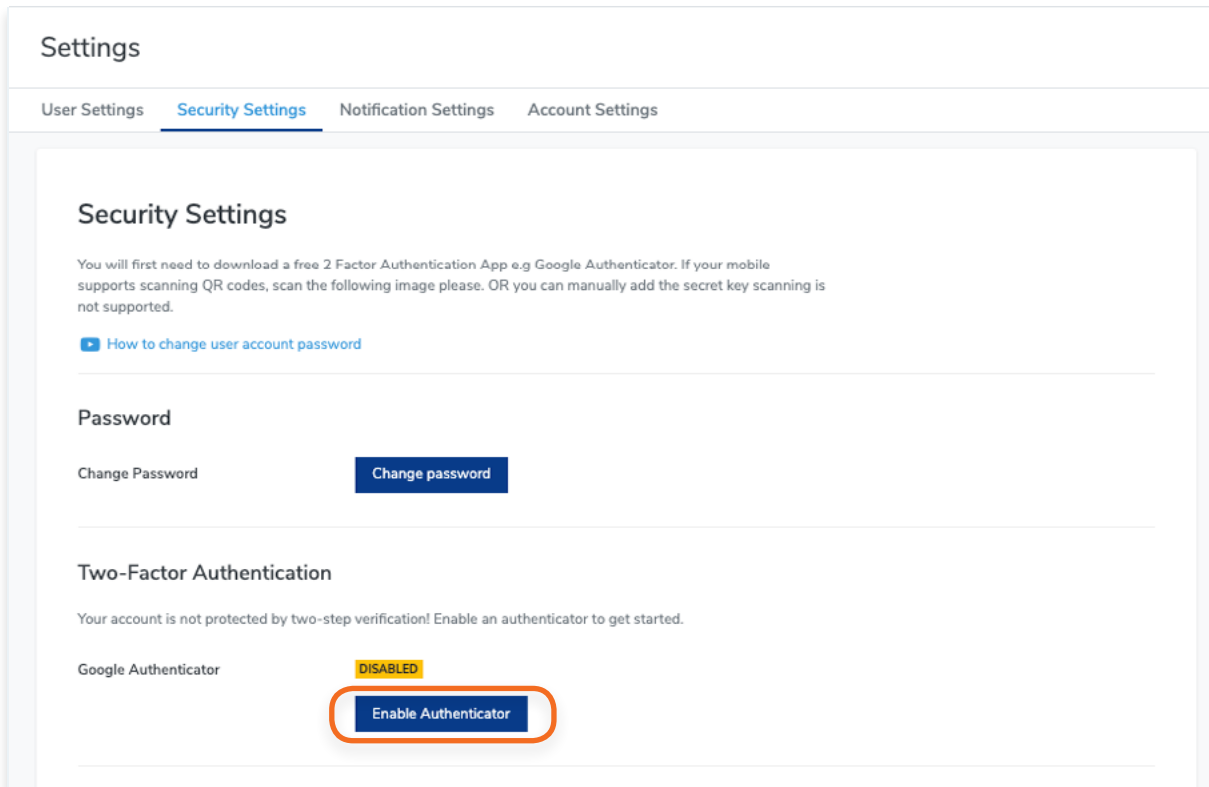
1. From your **dashboard**, click **Settings** on the left navigation ba



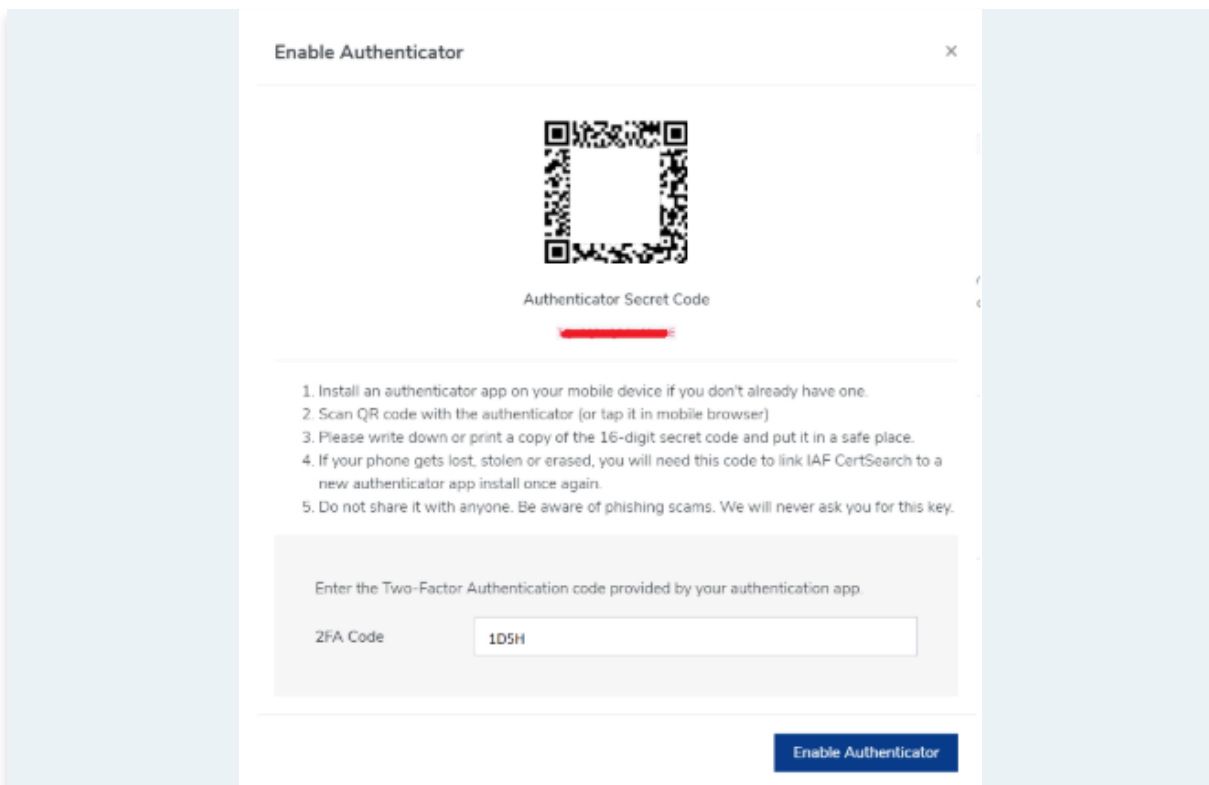
2. Click **Security Settings** in the menu bar.



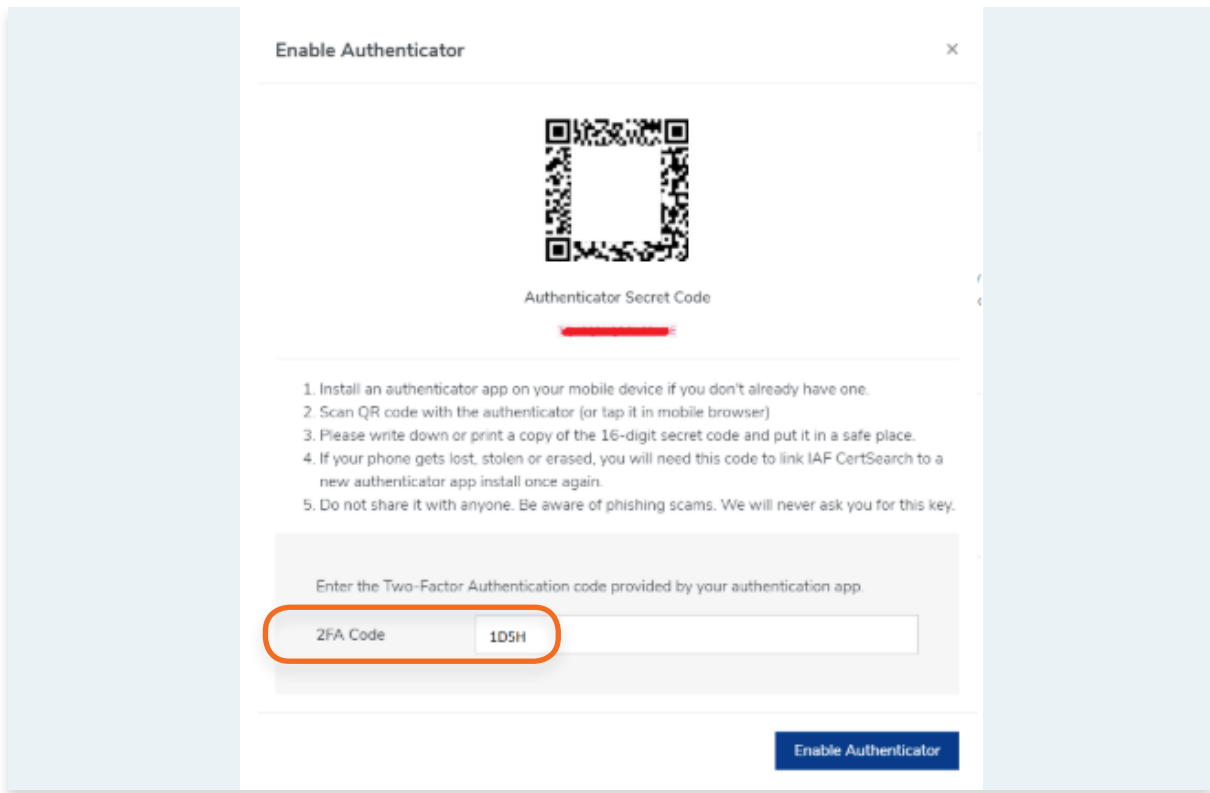
3. Click **Enable Authenticator**



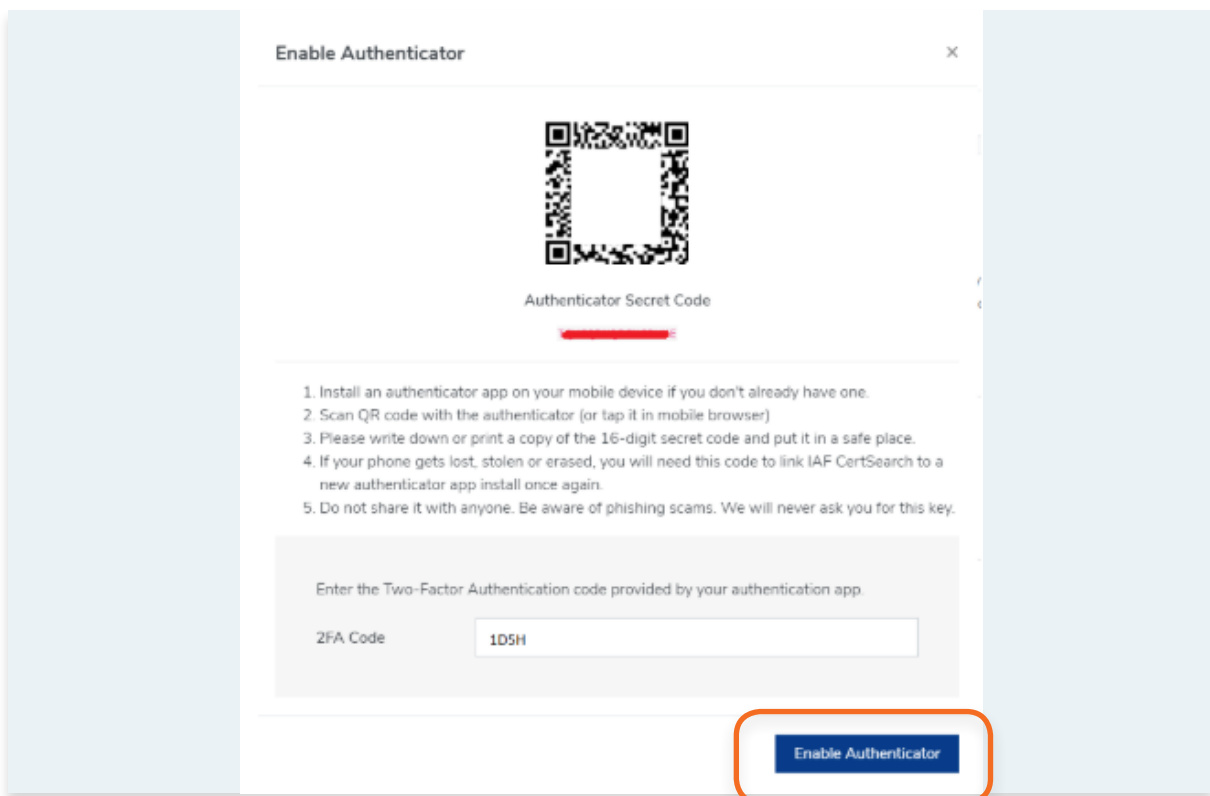
4. Scan the QR code or enter the Authenticator Secret Code below it in your mobile authenticator app.



5. The authenticator on your mobile will then generate a 2FA Code. Copy the code and enter it in the 2FA code section.



6. Click **Enable Authenticator**



10.5. How to Change Notification Settings

View the step by step guide below or watch the video guide here:

<https://youtu.be/gf3TcCfvjby>

This feature allows you to customize the Notifications you will receive and how often you receive notifications. Take note that if you turn off all notifications you will still receive important administrative emails such as password resets.

View Alert and Email notifications :

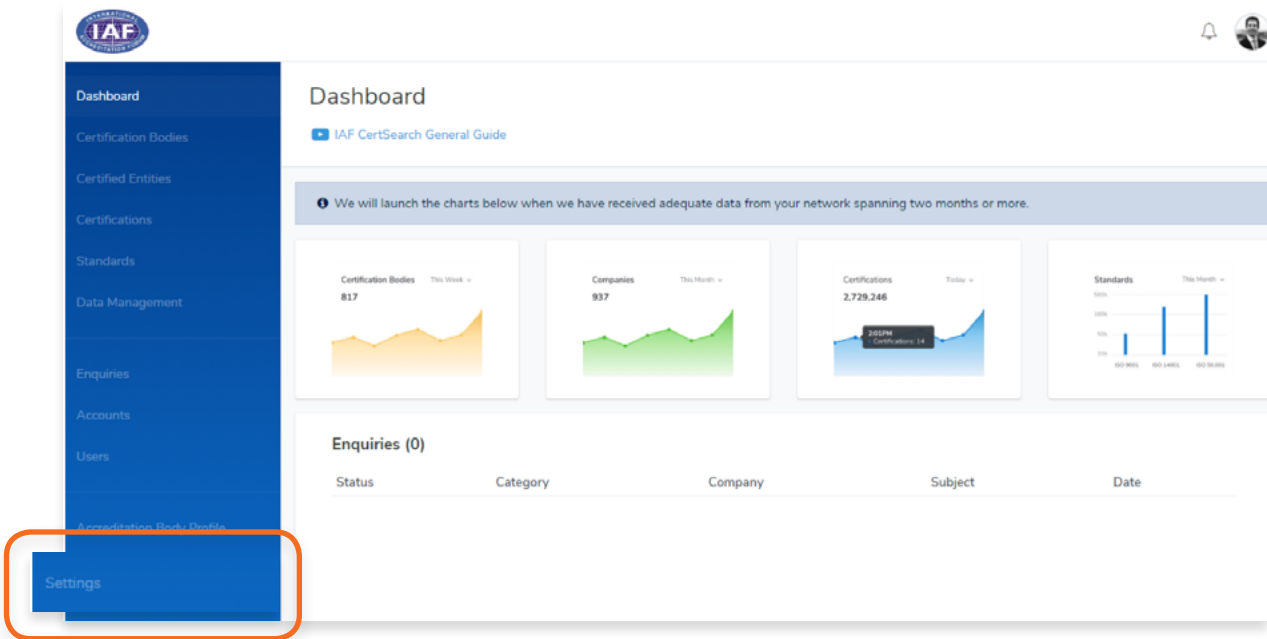
Alert Notifications

- **General Alerts**
 - **Enquiry Updates** - Alerts you on New Enquiries, Updates, and Activities
 - **Certification Updates** - Alerts you on Certification Updates and Activities
- **Data Management**
 - **File Upload** - Alerts you on File Uploads, Upload Status, and Error Logs

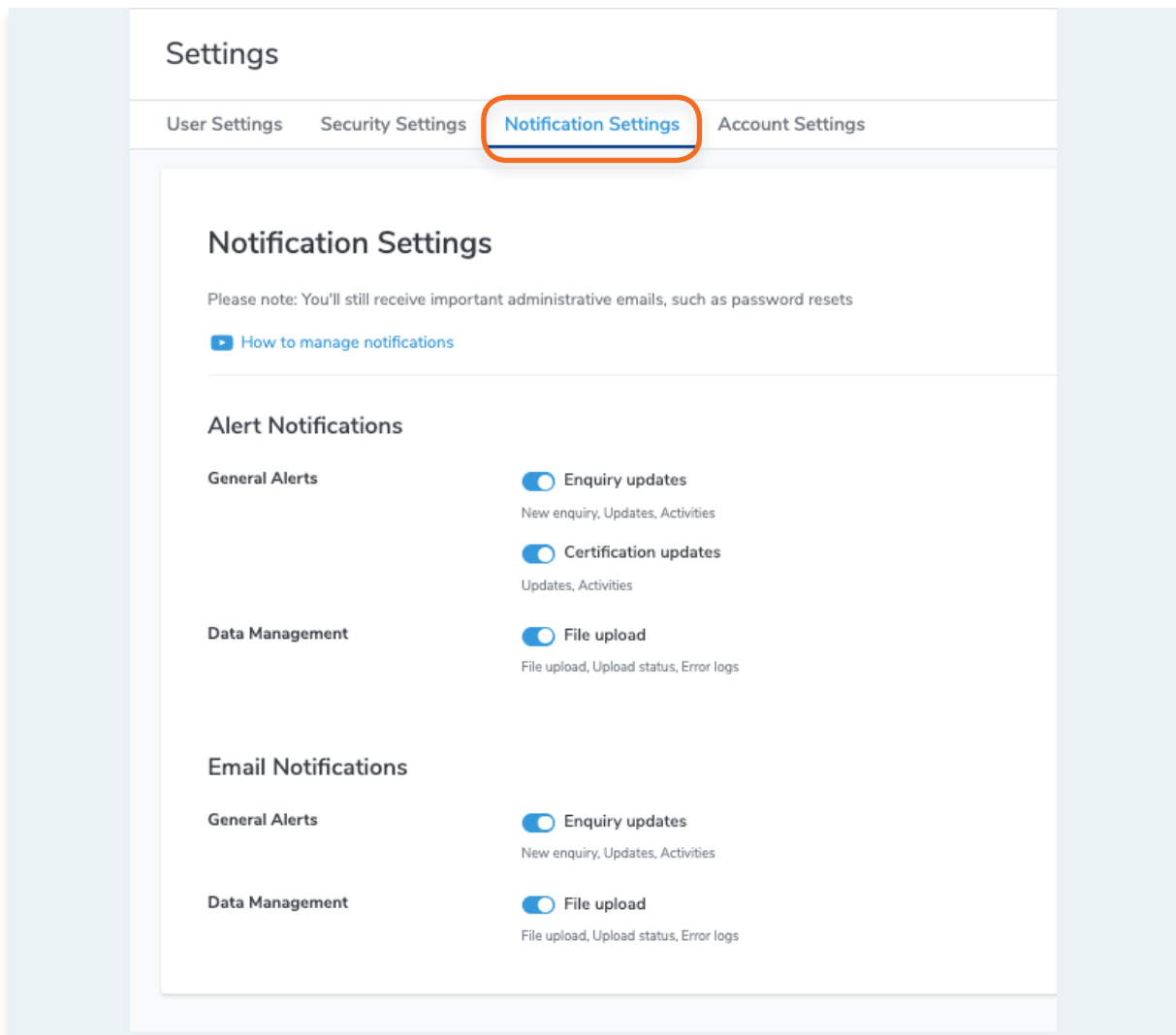
Email Notifications

- **General Alerts**
 - **Enquiry Updates** - Enquiry Updates -Sends you a Notification Email on New Enquiries, Updates, and Activities
- **Data Management**
 - **File Upload** - Sends you a Notification Email on File Uploads, Upload Status, and Error Logs

1. From your **dashboard**, click **Settings** on the left navigation bar



2. Click **Notification Settings** in the menu bar.



10.6. How to Change Account Settings

View the step by step guide below or watch the video guide here:

How to Change the Account Name

<https://youtu.be/EDwulHIXtRQ>

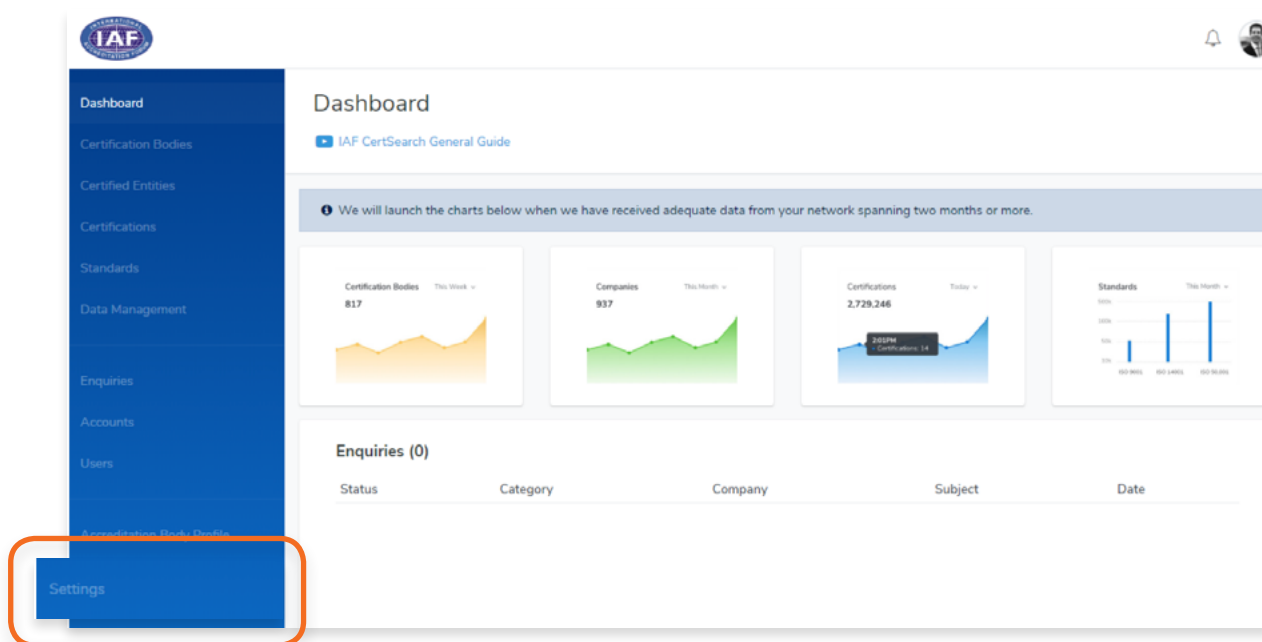
How to Change the Account Email

<https://youtu.be/UoW2QCrAOJM>

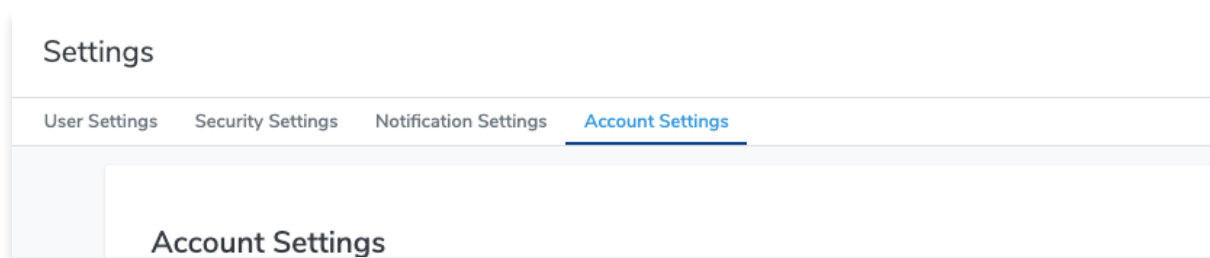
How to Change the Account Website

<https://youtu.be/CvkTe5IRkf8>

1. From your **dashboard**, click **Settings** on the left navigation bar



2. Click **Account Settings** in the menu bar.



3. Click **Edit**
4. You can now edit the Account Name, Account Email, Key Contact Name, Account Website, Economy/Country and Address.
5. Click **Save Changes** or click **Cancel** to revert any changes made.

Account Settings

[How to change the account name](#) [How to change the account email](#) [How to change the account website](#)

Account Information

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name	<input type="text" value="Test Accreditation Body"/>
Account Email	<input type="text" value="test.ab@iafcertsearch.org"/>
Key Contact Name	<input type="text" value="Seon - Bin Kim"/>
Account Website	<input type="text" value="https://www.iafcertsearch.org"/>

Location

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

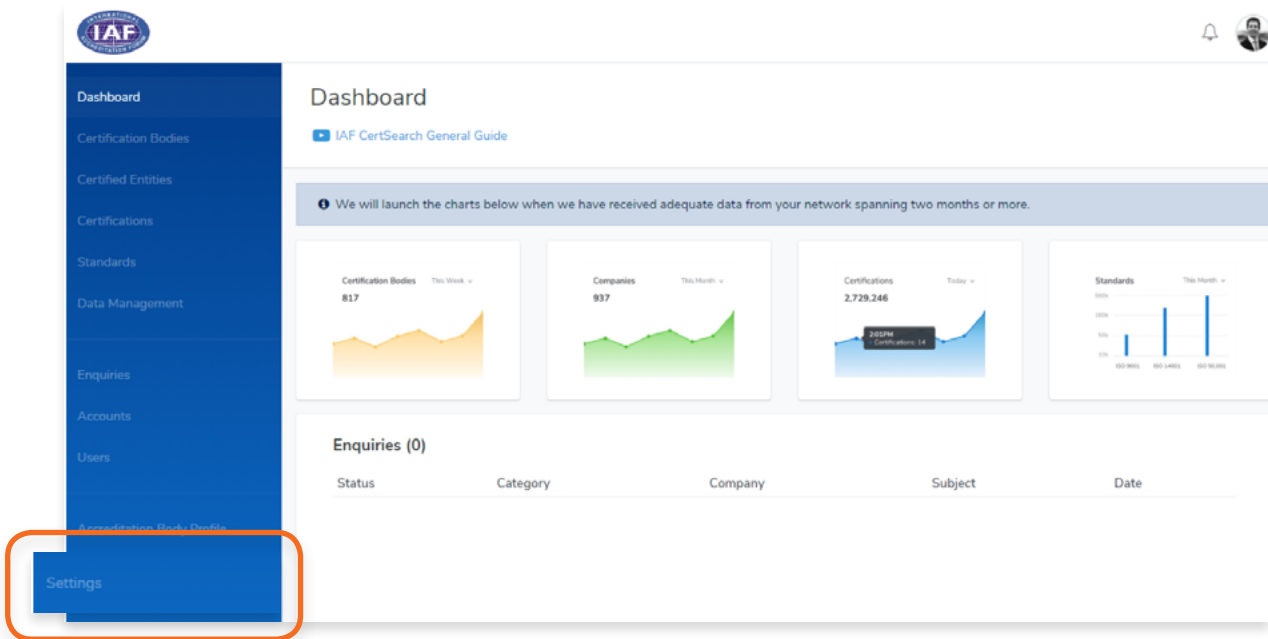
Economy/Country	<input style="width: 100%;" type="text" value="Korea, Republic of"/>
Address	<input type="text" value="93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungchi"/>

[Save changes](#)

10.6.1. How to Change the Account Name

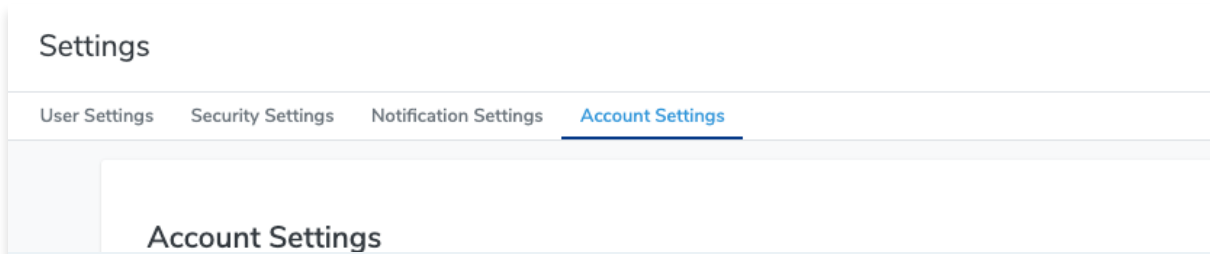
View the step by step guide below or watch the video guide here:
<https://youtu.be/EDwulHIXtRQ>

1. From your **dashboard**, click **Settings** on the left navigation bar



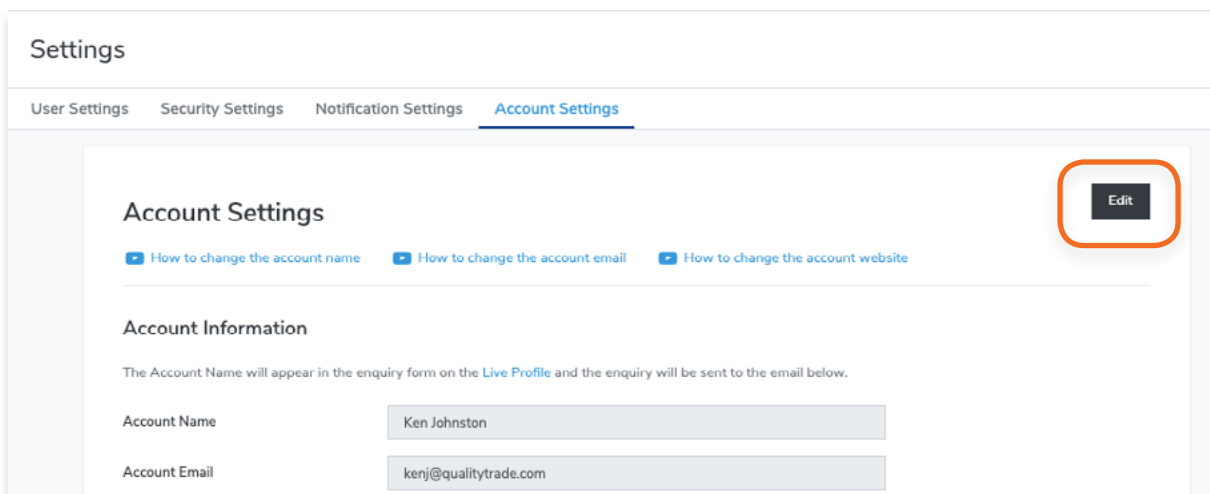
The screenshot shows the IAF dashboard interface. On the left, there is a vertical navigation menu with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, and Settings. The 'Settings' item is highlighted with a red rectangular box. The main dashboard area displays several charts: 'Certification Bodies' (817, This Week), 'Companies' (937, This Month), 'Certifications' (2,728,246, Today), and 'Standards' (This Month). Below the charts is a table titled 'Enquiries (0)' with columns for Status, Category, Company, Subject, and Date.

2. Click **Account Settings** in the menu bar.



The screenshot shows the 'Settings' page. At the top, there are four tabs: 'User Settings', 'Security Settings', 'Notification Settings', and 'Account Settings'. The 'Account Settings' tab is selected and underlined. Below the tabs, the page title 'Account Settings' is displayed.

3. Click **Edit**



The screenshot shows the 'Account Settings' page. At the top, there are four tabs: 'User Settings', 'Security Settings', 'Notification Settings', and 'Account Settings'. The 'Account Settings' tab is selected and underlined. Below the tabs, the page title 'Account Settings' is displayed. There are three links: 'How to change the account name', 'How to change the account email', and 'How to change the account website'. Below these links is the 'Account Information' section. It contains two input fields: 'Account Name' with the value 'Ken Johnston' and 'Account Email' with the value 'kenj@qualitytrade.com'. An 'Edit' button is located in the top right corner of the page and is highlighted with a red rectangular box.

4. **Edit** the Account Name.

Account Settings Cancel

[▶ How to change the account name](#) [▶ How to change the account email](#) [▶ How to change the account website](#)

Account Information

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name	<input type="text" value="Test Accreditation Body"/>
Account Email	<input type="text" value="test.ab@iafcertsearch.org"/>
Key Contact Name	<input type="text" value="Seon - Bin Kim"/>
Account Website	<input type="text" value="https://www.iafcertsearch.org"/>

Location

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

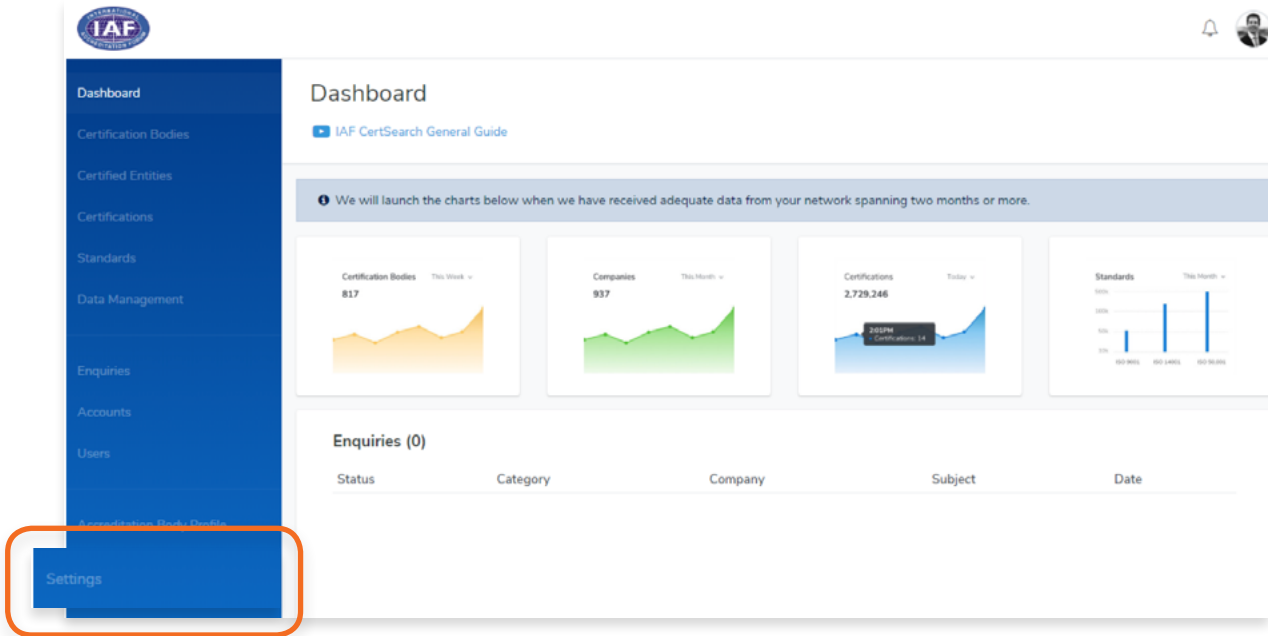
Economy/Country	<input type="text" value="Korea, Republic of"/> ▼
Address	<input type="text" value="93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungch"/>

5. Click **Save changes** or click **Cancel** to revert changes.

10.6.2. How to Change the Account Email

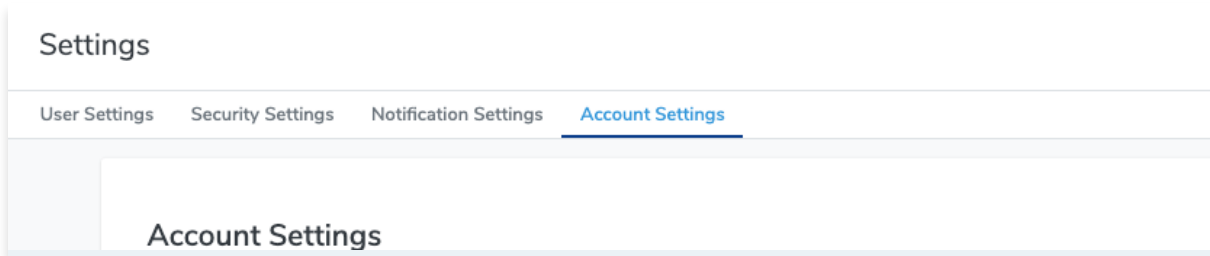
View the step by step guide below or watch the video guide here:
<https://youtu.be/UoW2QCrAOJM>

1. From your **dashboard**, click **Settings** on the left navigation bar



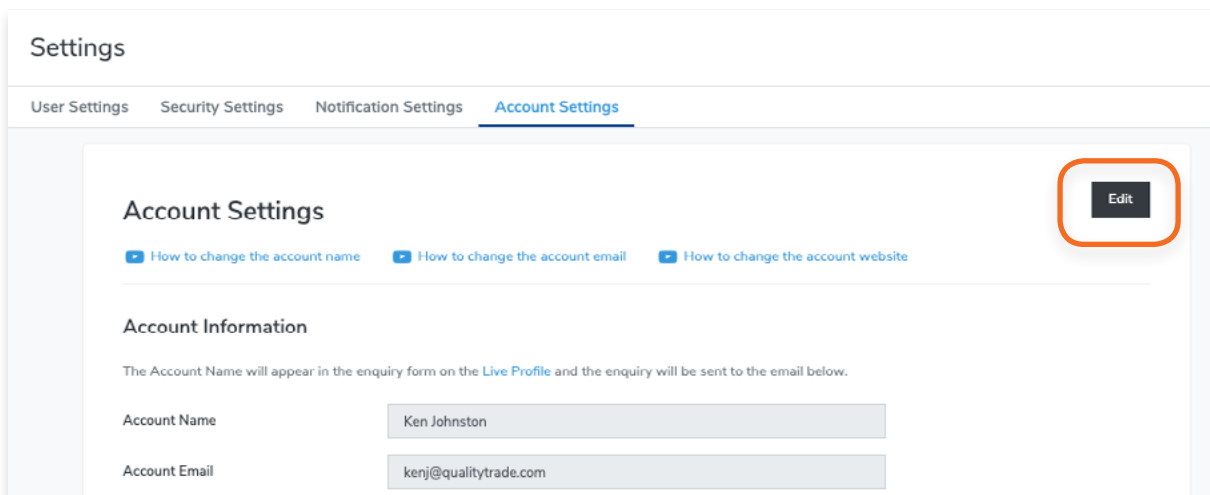
The screenshot shows the IAF dashboard interface. On the left is a dark blue navigation menu with the following items: Dashboard, Certification Bodies, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, and Settings. The 'Settings' item is highlighted with a red rectangular box. The main dashboard area displays several charts: 'Certification Bodies' (817 This Week), 'Companies' (937 This Month), 'Certifications' (2,729,246 Today), and 'Standards' (This Month). Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company, Subject, Date.

2. Click **Account Settings** in the menu bar.



The screenshot shows the 'Settings' page. At the top, there are four tabs: 'User Settings', 'Security Settings', 'Notification Settings', and 'Account Settings'. The 'Account Settings' tab is selected and underlined. Below the tabs, the page title 'Account Settings' is displayed.

3. Click **Edit**



The screenshot shows the 'Account Settings' page. At the top, there are four tabs: 'User Settings', 'Security Settings', 'Notification Settings', and 'Account Settings'. The 'Account Settings' tab is selected and underlined. Below the tabs, the page title 'Account Settings' is displayed. There are three links: 'How to change the account name', 'How to change the account email', and 'How to change the account website'. Below these links is the 'Account Information' section. It contains two input fields: 'Account Name' with the value 'Ken Johnston' and 'Account Email' with the value 'kenj@qualitytrade.com'. An 'Edit' button is located in the top right corner of the form area and is highlighted with a red rectangular box.

4. You can now edit the **Account Email**.

The screenshot shows the 'Account Settings' page. At the top right is a 'Cancel' button. Below the title are three links: 'How to change the account name', 'How to change the account email', and 'How to change the account website'. The 'Account Information' section includes a note: 'The Account Name will appear in the enquiry form on the Live Profile and the enquiry will be sent to the email below.' The form fields are: 'Account Name' (Test Accreditation Body), 'Account Email' (test.ab@iafcertsearch.org, highlighted with an orange border), 'Key Contact Name' (Seon - Bin Kim), and 'Account Website' (https://www.iafcertsearch.org). The 'Location' section includes a note: 'The City, State and Country will appear on the Live Profile. Full address will be private.' The form fields are: 'Economy/Country' (Korea, Republic of) and 'Address' (93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungchi). At the bottom is a blue 'Save changes' button.

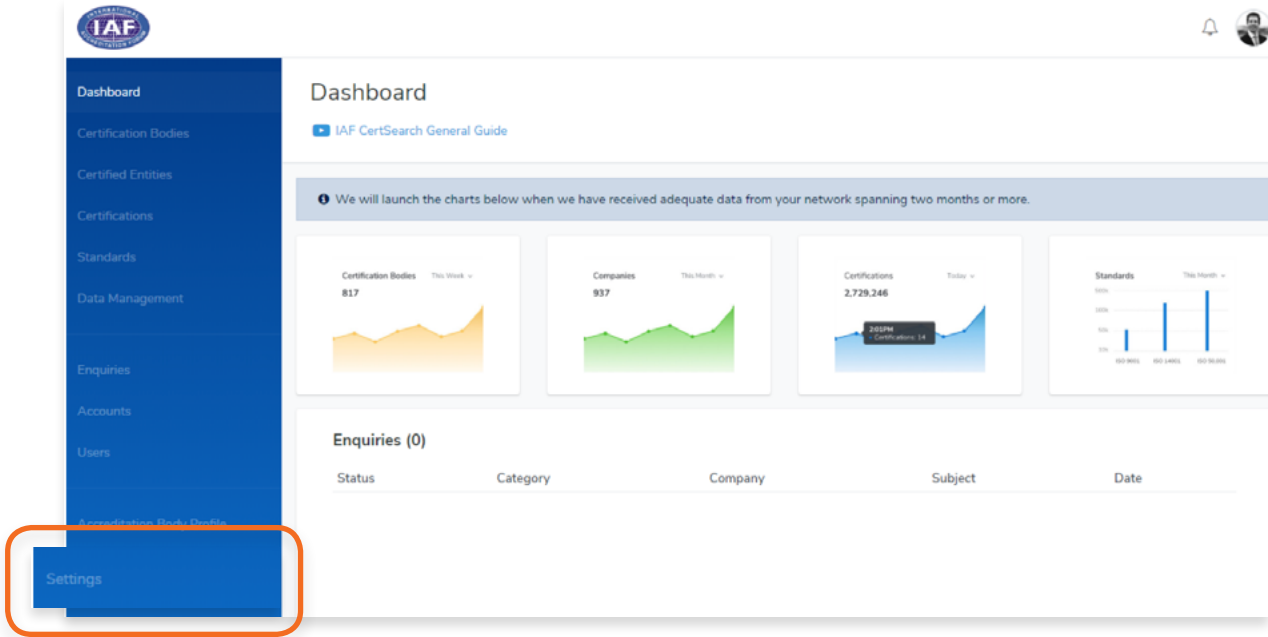
Field	Value
Account Name	Test Accreditation Body
Account Email	test.ab@iafcertsearch.org
Key Contact Name	Seon - Bin Kim
Account Website	https://www.iafcertsearch.org
Economy/Country	Korea, Republic of
Address	93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungchi

5. Click **Save changes** or click **Cancel** to revert changes.

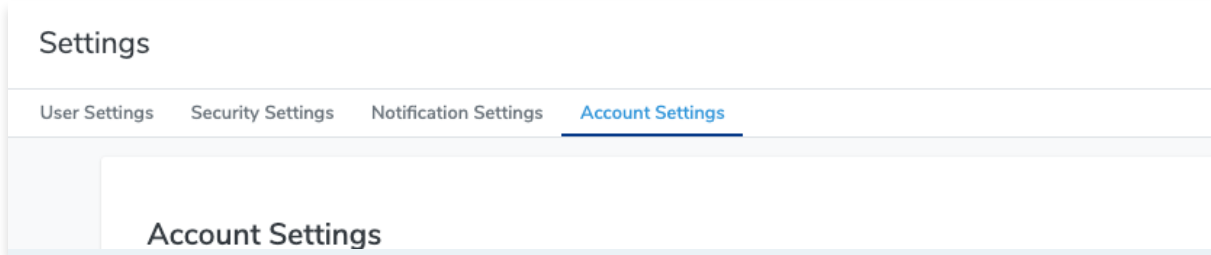
10.6.3. How to Change the Account Website

View the step by step guide below or watch the video guide here:
<https://youtu.be/UoW2QCrAOJM>

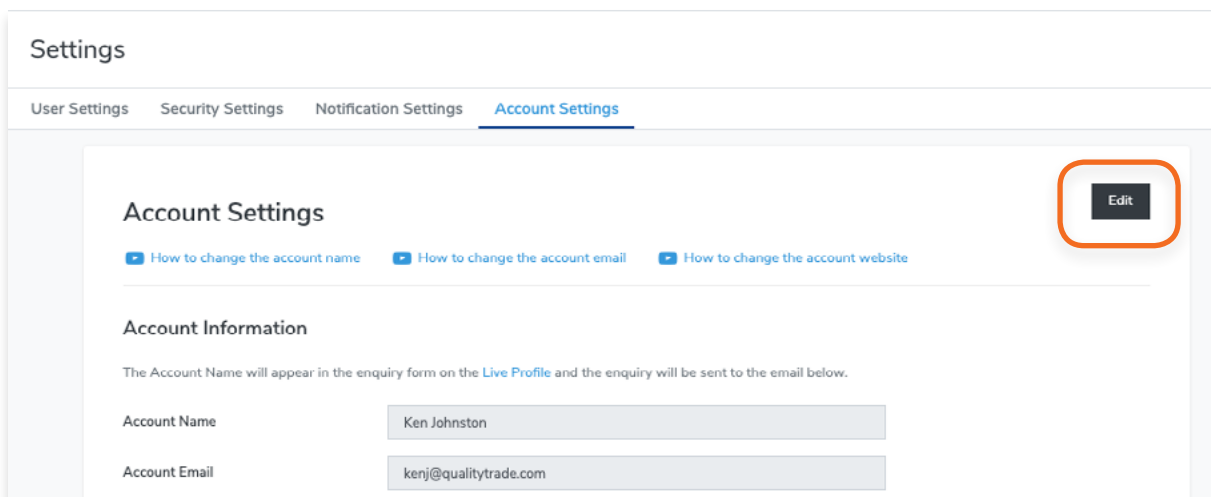
1. From your **dashboard**, click **Settings** on the left navigation bar



2. Click **Account Settings** in the menu bar.



3. Click **Edit**



4. Edit the **Account Website**.

Account Settings

Cancel

[▶ How to change the account name](#) [▶ How to change the account email](#) [▶ How to change the account website](#)

Account Information

The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below.

Account Name	<input type="text" value="Test Accreditation Body"/>
Account Email	<input type="text" value="test.ab@iafcertsearch.org"/>
Key Contact Name	<input type="text" value="Seon - Bin Kim"/>
Account Website	<input type="text" value="https://www.iafcertsearch.org"/>

Location

The City, State and Country will appear on the [Live Profile](#). Full address will be private.

Economy/Country	<input type="text" value="Korea, Republic of"/>
Address	<input type="text" value="93, Isu-ro, Maengdong-myeon, Eumseong-gun, Chungchi"/>

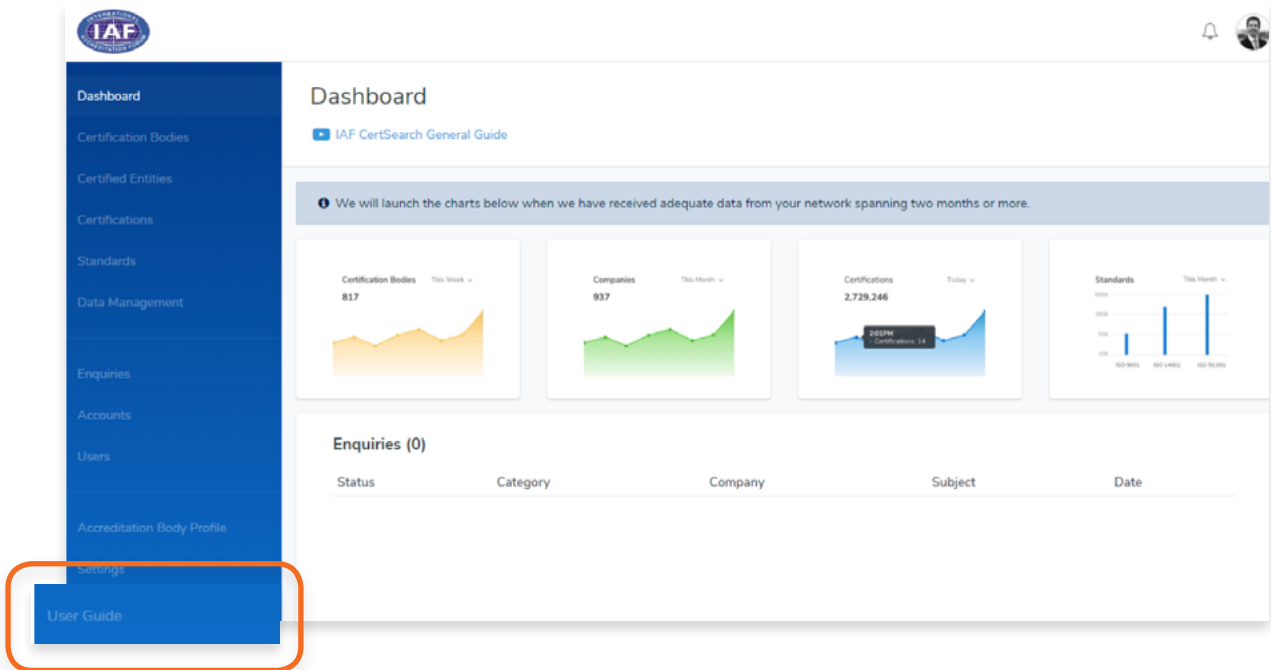
[Save changes](#)

5. Click **Save changes**.

11. User Guide

11.1. How to Ciew the User Guide

1. From your **dashboard**, click **User Guide** on the left navigation bar



2. You will be directed to the User Guide page, view sections on Technical Instructions, General Instructions, Video Guides, and Marketing & Communications.

