IAFCertSearch.org

Certification Bodies: **Guide to the IAF CertSearch**

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=8FlND6c-3M4&t=3s

Here is a **general CB overview video:**
https://www.youtube.com/watch?v=o2zYFXhbuJ4

Table of Contents

1. Activation

▌   1.1   How to Activate Your Account

Step 1

Go to your inbox and open the email sent from info@iafcertsearch.org with subject **"Activation - IAF"** .
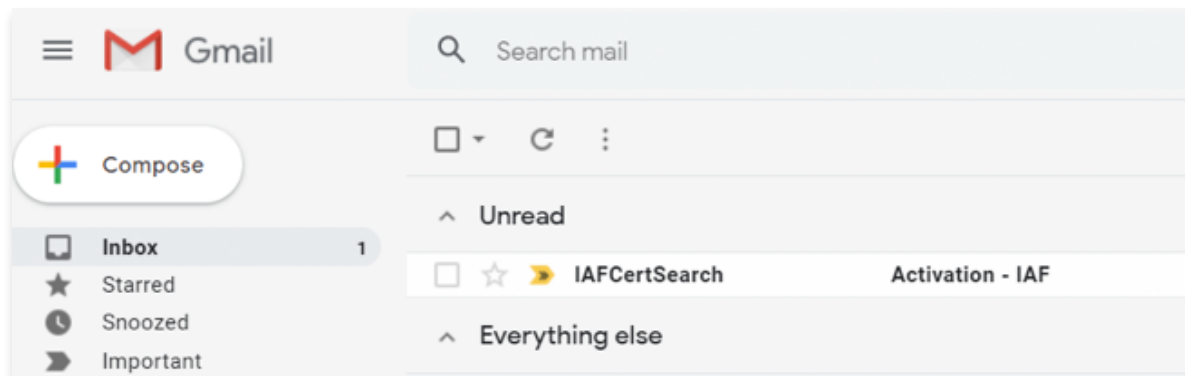
Step 2

Click the **Activate Account** button or **Copy and paste the link** from your email to your web browser.
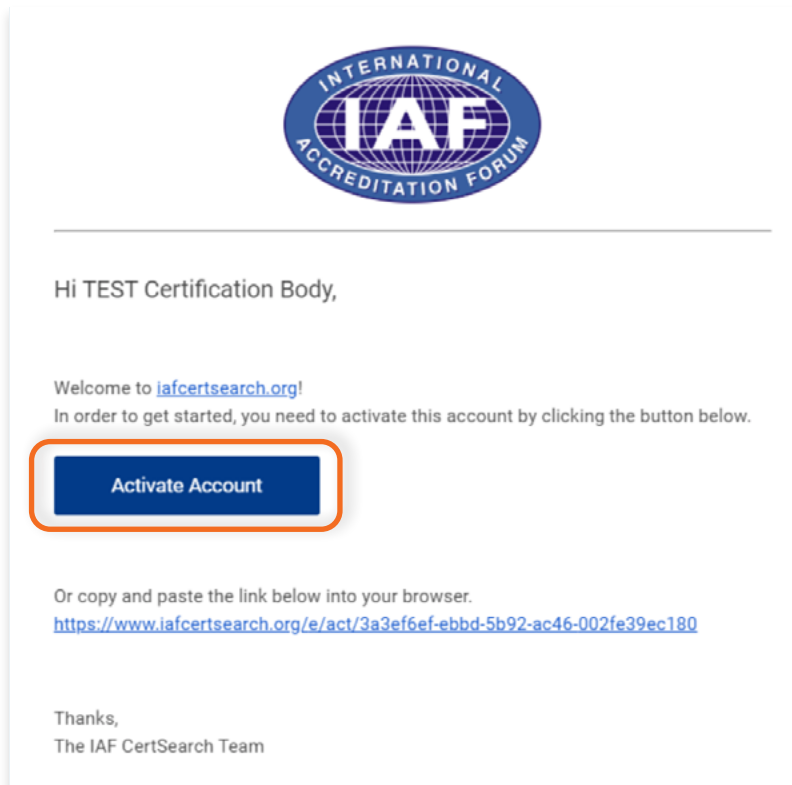
Step 3

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

Step 4

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

Note: Your Email Address and Password will be used as your credetentials to log in.

Once created, your account will be activated, go to step 5.
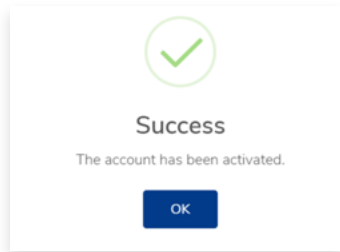
Step 5

The next step is to **confirm your email address.**
Go back to your inbox and you should receive a confirmation email.

Open the email with Subject **"Please confirm your email address -IAF"**
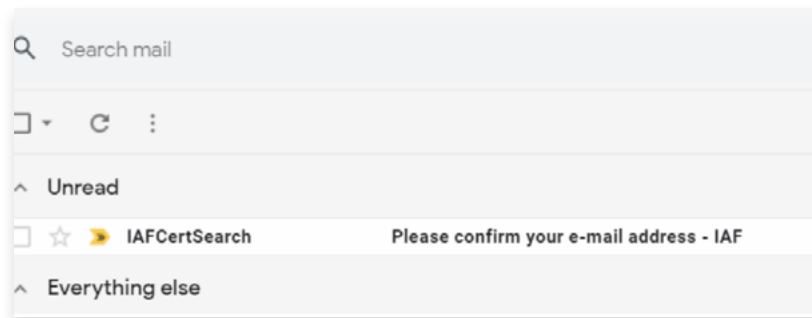
NOTE:
If you did not receive an email, Click the "**Email didn't arrive?**" link and resend.

Click the **"Confirm Email"** button.

Hi Diego Beltran,

Welcome to iafcertsearch.org!
In order to get started, you need to confirm your email address.

Confirm Email

Thanks,
The IAF Cert Search Team

If you have any questions, please email us at info@iafcertsearch.org
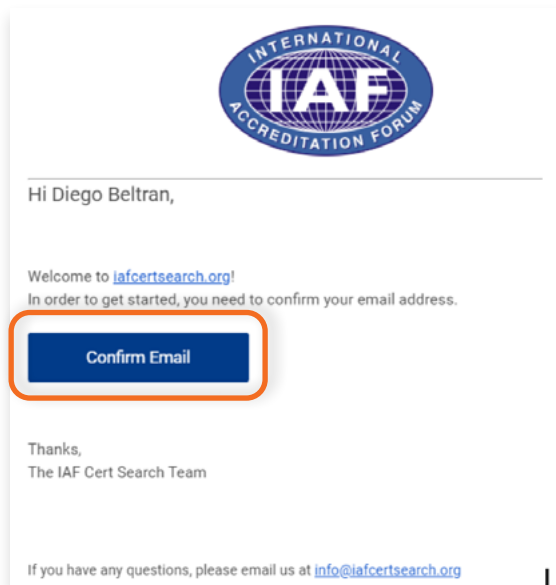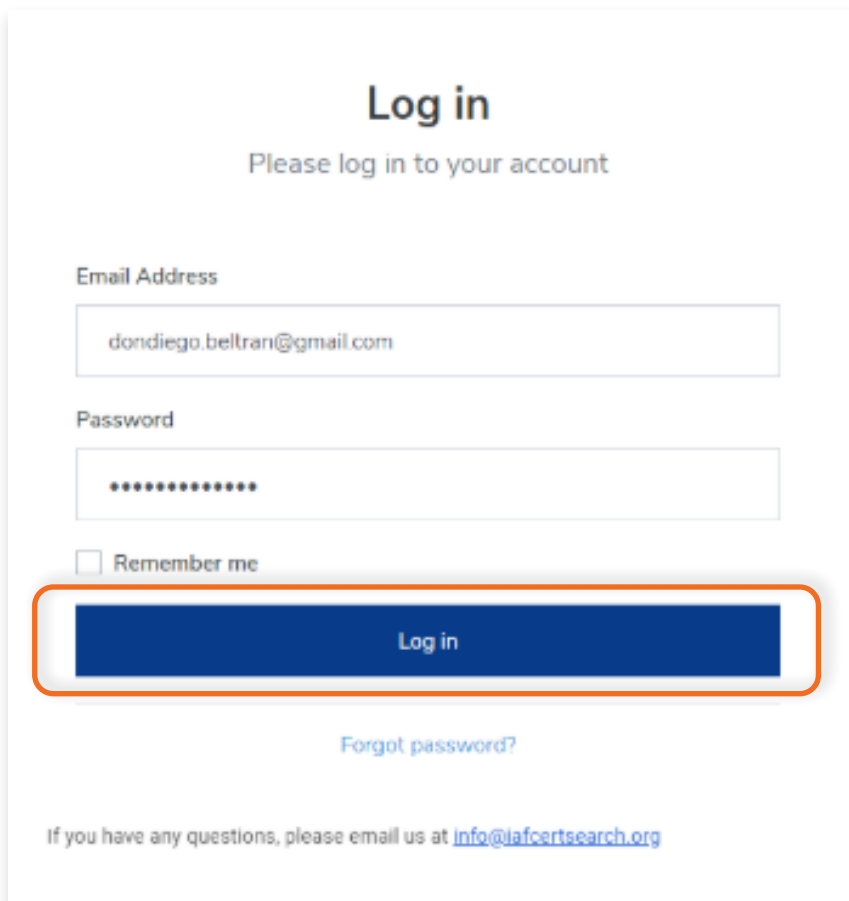
A "Success" message will pop up. Click **OK** to proceed.
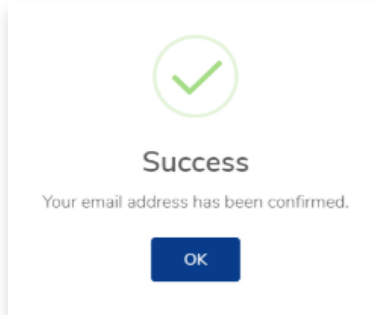
Step 6

You will then be directed to the IAF CertSearch Log in page. Enter your email address and password and click Log in.

2. Dashboard

2.1 Dashboard Overview

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 certification body account: https://www.youtube.com/watch?v=o2zYFXhbuJ4

3. Certified Entities

3.1 Where Can I Find a List of All Certified Entities

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=1O3G1Lmm9fY&feature=youtu.be

From the Dashboard, click Certified Entities in the left hand navigation.
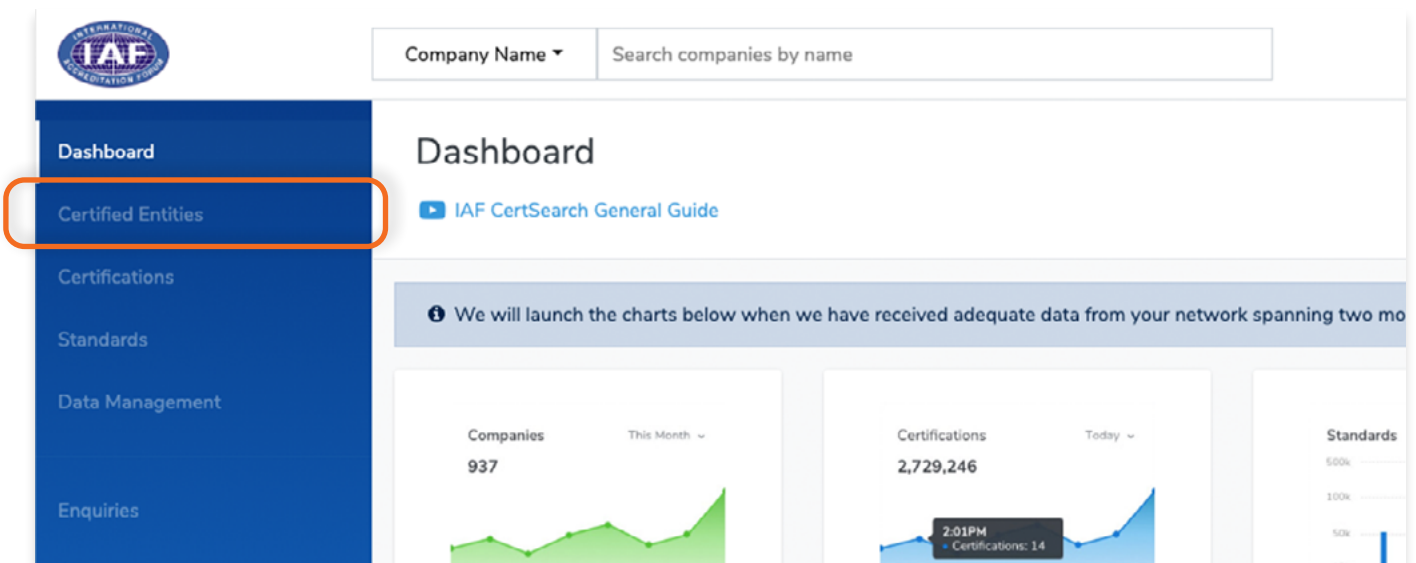
Here you can view, edit and add Certified Entities.
You can filter Certified Entities by Status (Active or Inactive), Location or Search by name.

The list will include the following fields for each Certified Entity:

- **Status –** indicates if a certified entity is active or inactive in IAF CertSearch
- **Unique ID –** The Certified Entity Unique ID, issued by the CB to identify the organisation
- **Certified Entity –** this is the Certified Entity Name issued by the CB
- **Location –** country location of the Certified Entity issued by the CB
- **Certifications –** shows the number of certifications uploaded for the Certified Entity
- **Updated at –** shows when the Certified Entity data was last updated
- **Created at –** shows when the Certified Entity record was created
- **Actions –** the action button enables the CB to click and view Certified Entity Details, Edit or Add new Certifications and send Activation invitation links to a Certified Entity

3.2 How to View Certified Entity Information

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

In the Certified Entities page, Search for the Certified Entity you want to view.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Here you will be able to view and edit Certified Entity Details and Certifications. You will also be able to view how the Certified Entity's profile will appear in IAFCertSearch.org via the Live Profile.

Details

Certifications

Certified Entities / Test Media Company / Certifications

Test Media Company
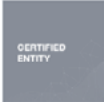
Details   Certifications   Live Profile

| Filter by Status | ⌄ | Filter by AB | ⌄ | Search Cert No. | 🔍 | | | | | | + Add Certification |

Status	Certification Number	Scheme Name	Standard Name	Expiry Date	Accreditation Body	Certified Entity	Updated at	Created at	Actions
● Draft	xx123456	Environmental Management Systems Scheme	ISO 180001:2014	N/A	Test Accreditation Body (TAB)	Test Media Company	2019-08-08	2019-08-08	View

Live Profile

Certified Entity

CERTIFIED
ENTITY

Test Media Company

Location   Santa Fe, NM, United States

Certifications (1)   **Management System**   Standard(s):   ISO 180001:2014
                                                  Certificate Number: xx123456
                                                  Accreditation Body: Test Accreditation Body (TAB)
                                                  Certification Body: CB Test Profile

                                                  Validate

3.3   How to Edit/Update Certified Entity Details

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.
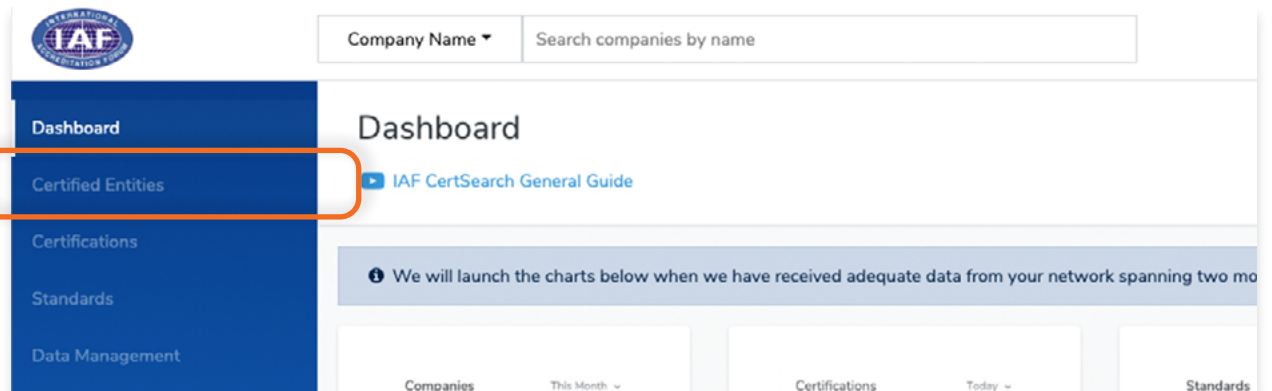
Step 2

In the Certified Entities page, Search for the Certified Entity you want to view.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Step 4

You can edit Status, Logo, Company Location, Company Information, and Private Information.
Click the **Edit Button** of the area you which to change and **Save** changes.

View the step by step guide below or watch the video guide here:
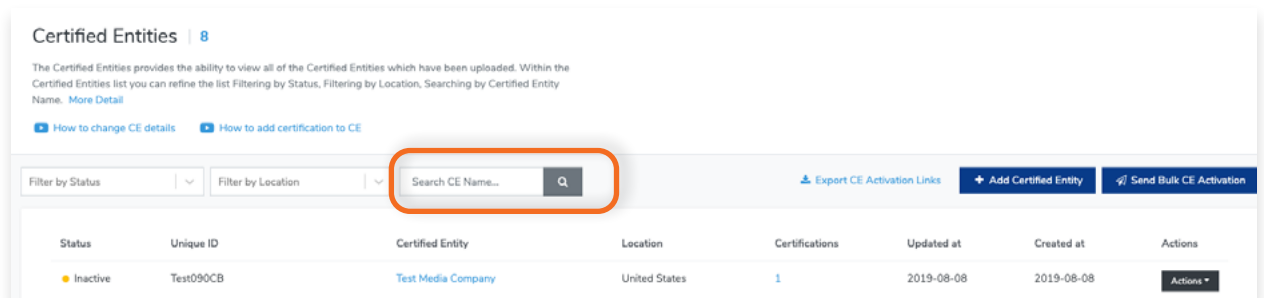
https://youtu.be/6bGPhfy4wuo

Step 1

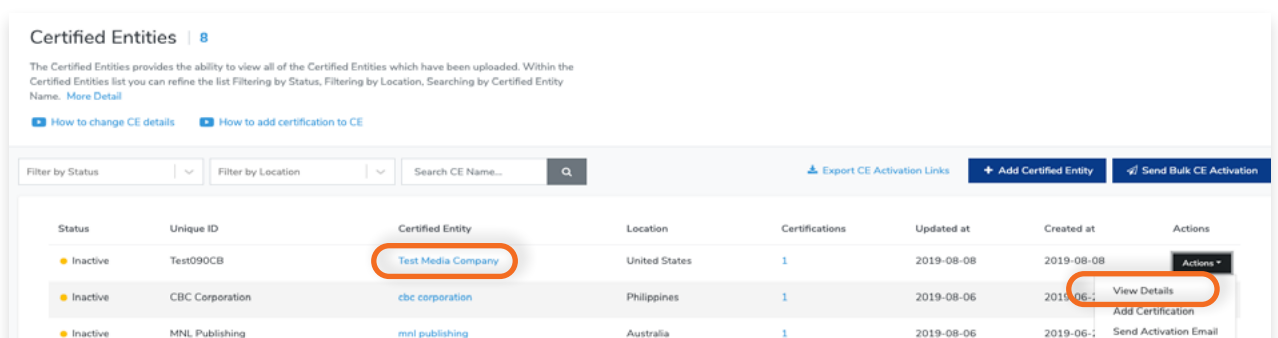From the Dashboard, click **Certified Entities** in the left hand navigation.
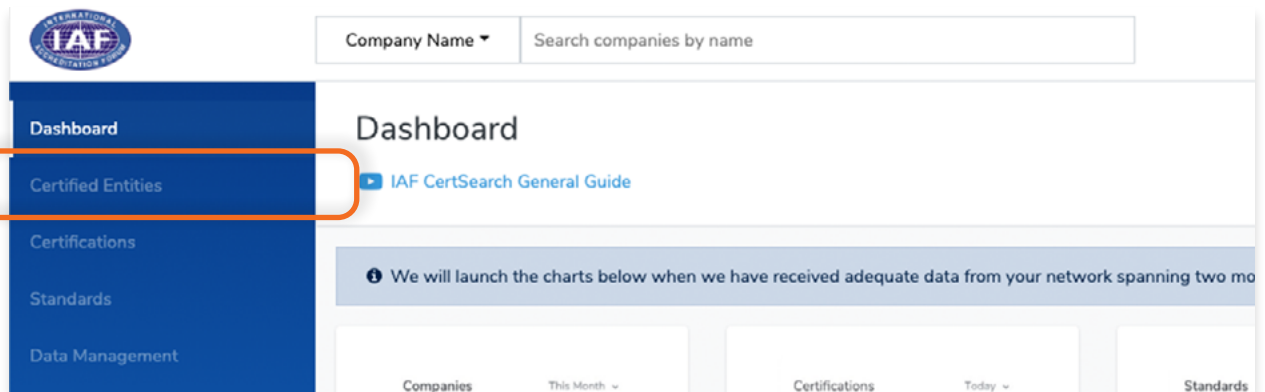
Step 2

In the Certified Entities page, Search for the Certified Entity you want to edit.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Step 4

In the Certified Entity Details Tab, Scroll down to the Company Logo Section and click Edit.

Step 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.

Step 6

Click Save Changes once done or click Cancel to revert changes.
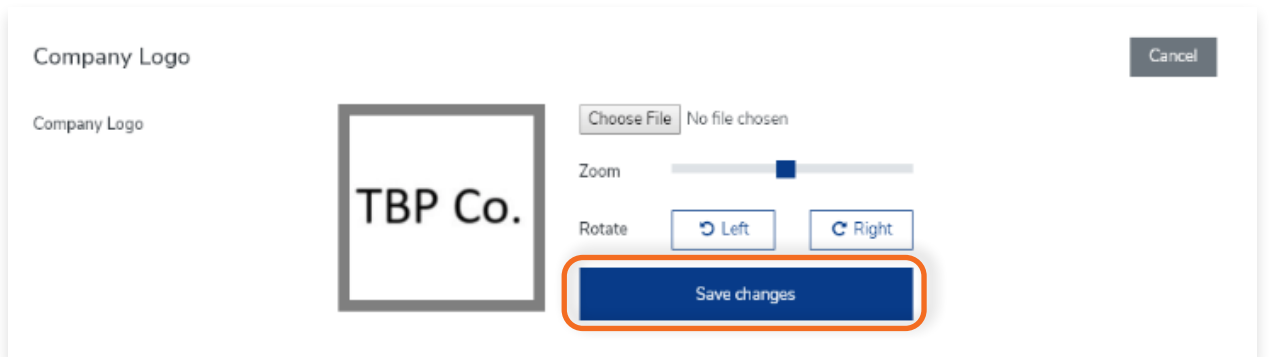
View the step by step guide below or watch the video guide here:
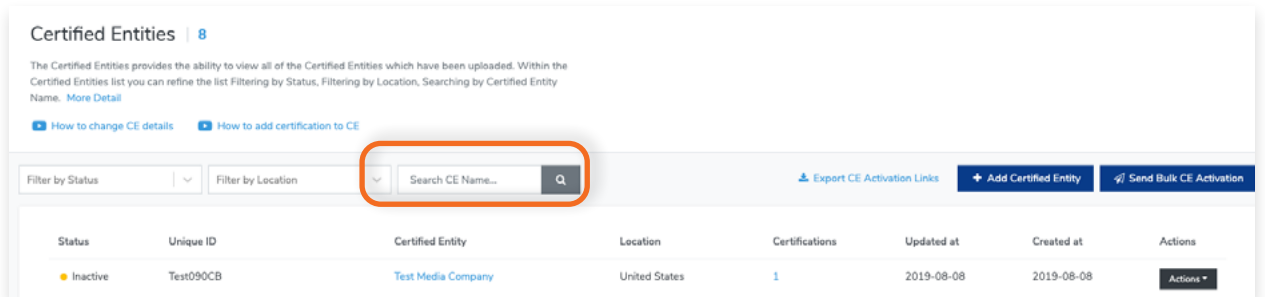
https://youtu.be/6bGPhfy4wuo

Step 1

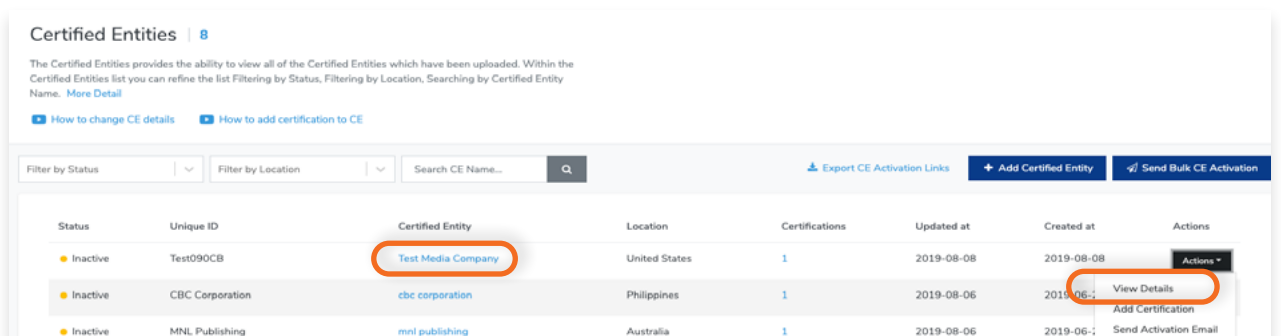From the Dashboard, click **Certified Entities** in the left hand navigation.
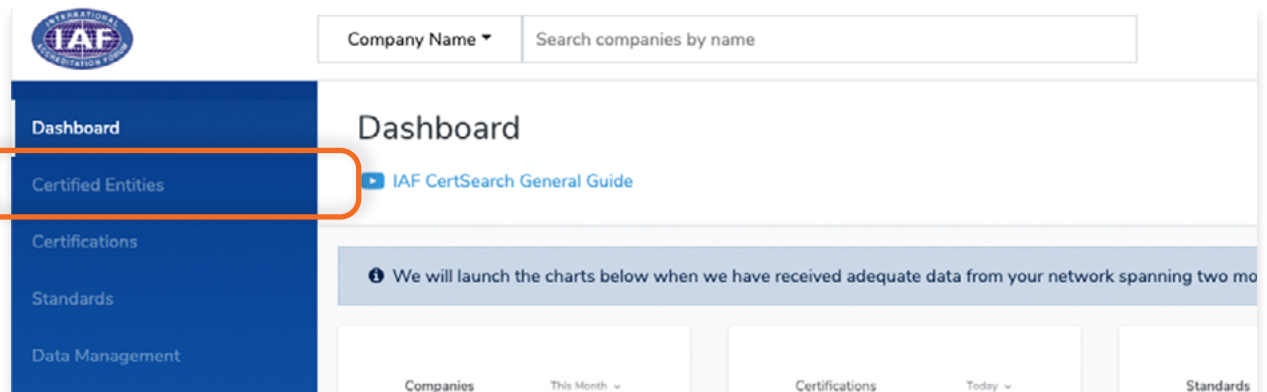
Step 2

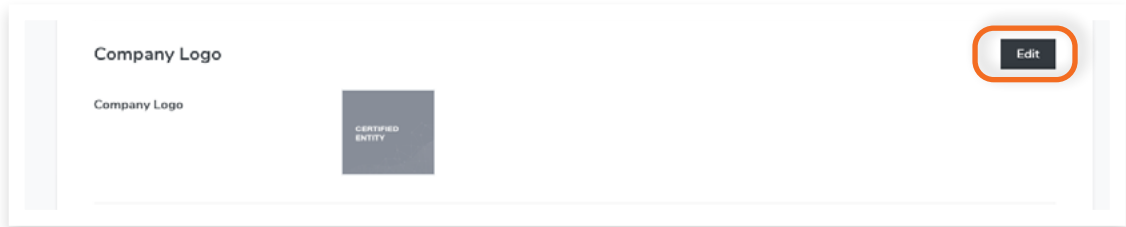In the Certified Entities page, Search for the Certified Entity you want to edit.
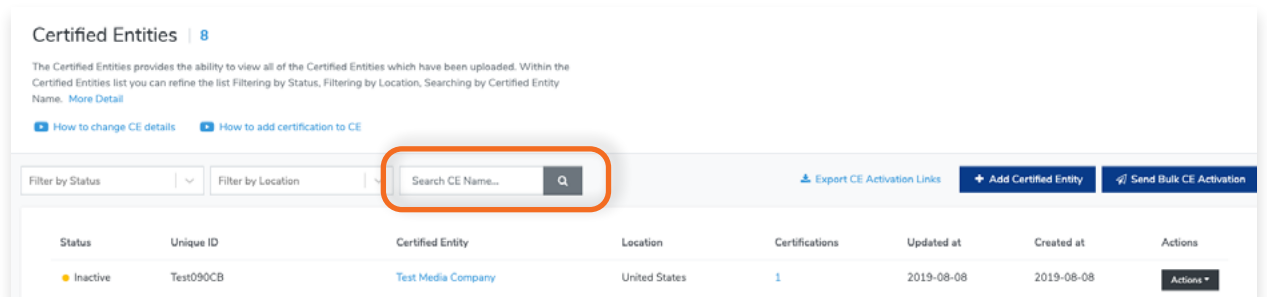
Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**
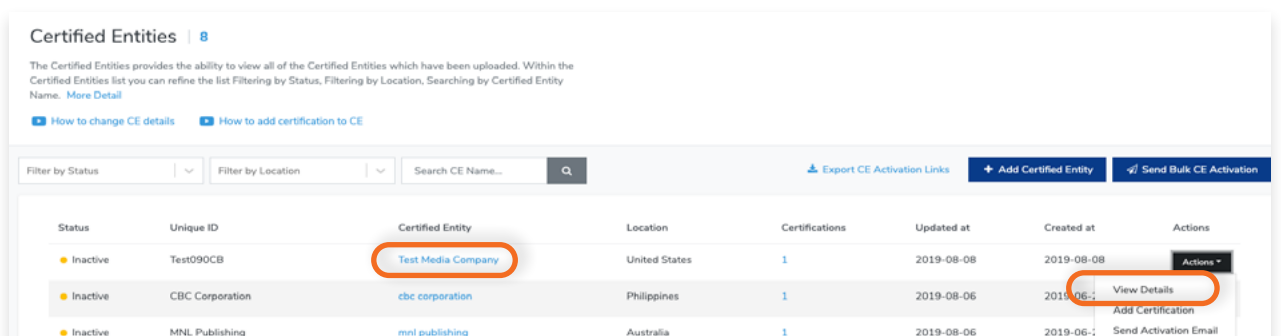
Step 4

Scroll down to the Company Location section and Click **Edit.**

Step 5

Change the Economy/Country and Address of a Certified Entity.

Step 6

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

■ **3.3.4   How to Edit Company Information**

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

https://youtu.be/6bGPhfy4wuo

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.


Step 2

In the Certified Entities page, Search for the Certified Entity you want to edit.
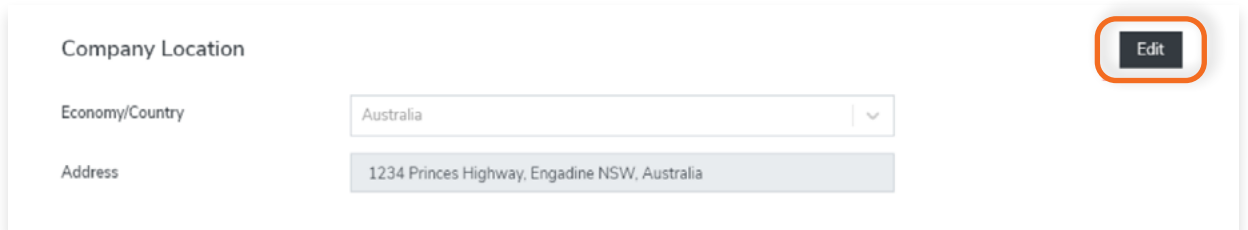

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Step 4

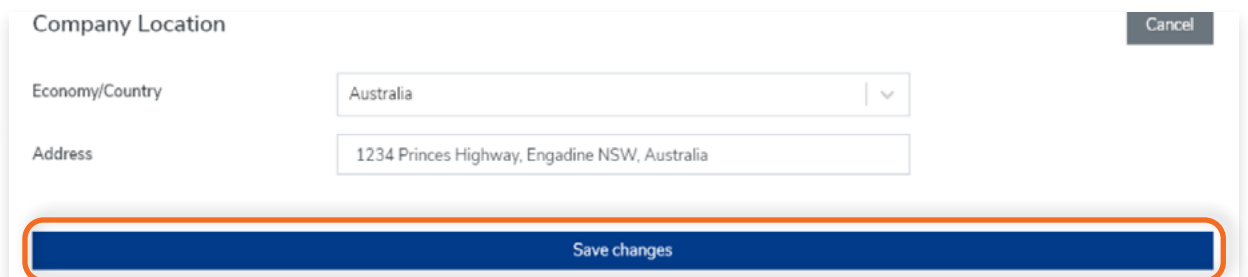Scroll down to the Company Information section and Click **Edit.**

Step 5

Change the Company Name, Company Trading Name, or Company English Name of a Certified Entity.

Step 6

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

View the step by step guide below or watch the video guide here:
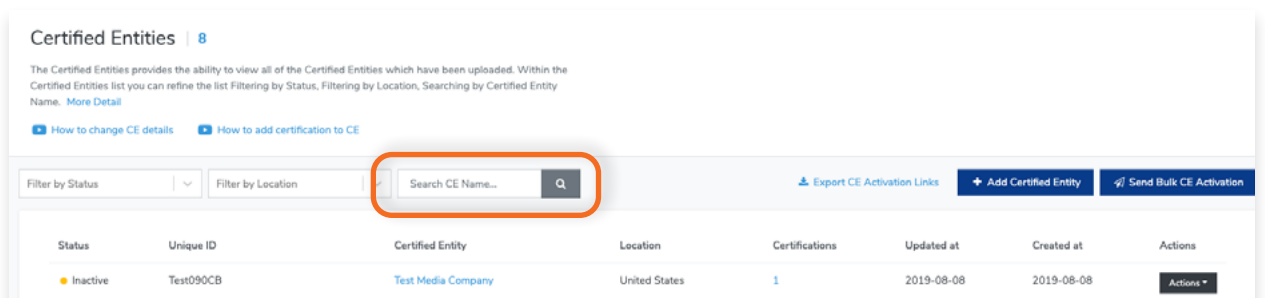
https://youtu.be/6bGPhfy4wuo

Step 1

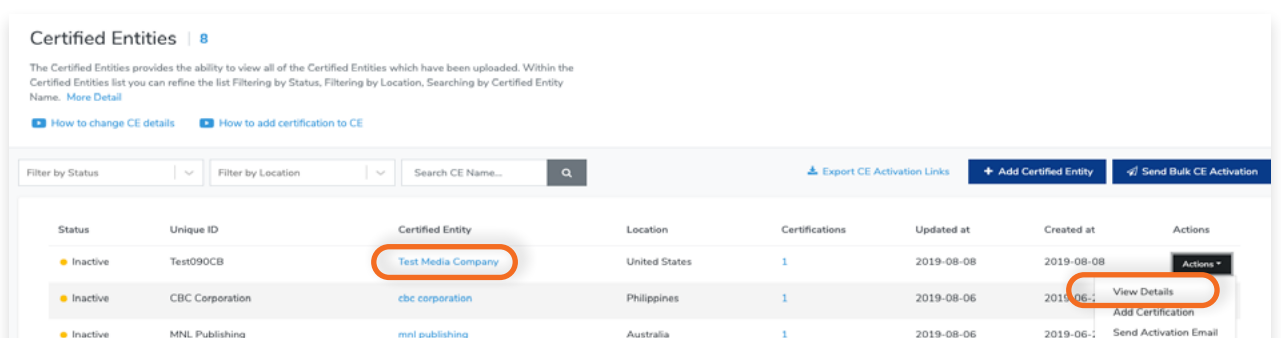From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

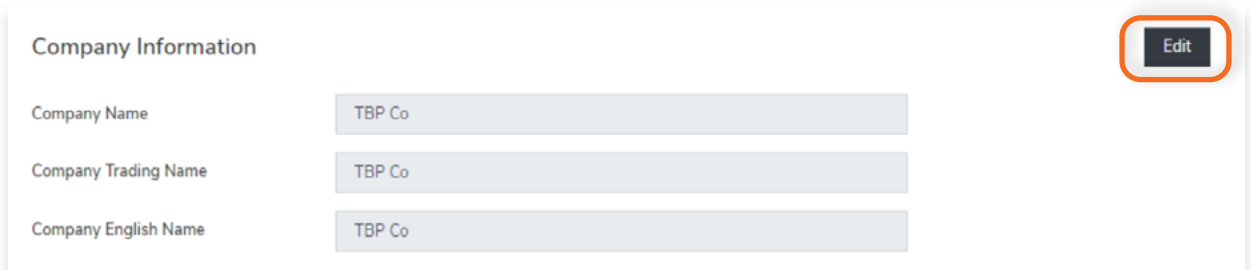In the Certified Entities page, Search for the Certified Entity you want to edit.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Step 4

Scroll down to the Company Information section and Click **Edit.**

Step 5

Change the Company Name, Company Trading Name, or Company English Name of a Certified Entity.

Step 6

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

3.4   How to Add Certified Entities Manually

The IAF CertSearch allows you to add Certified Entities Manually into your database.

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

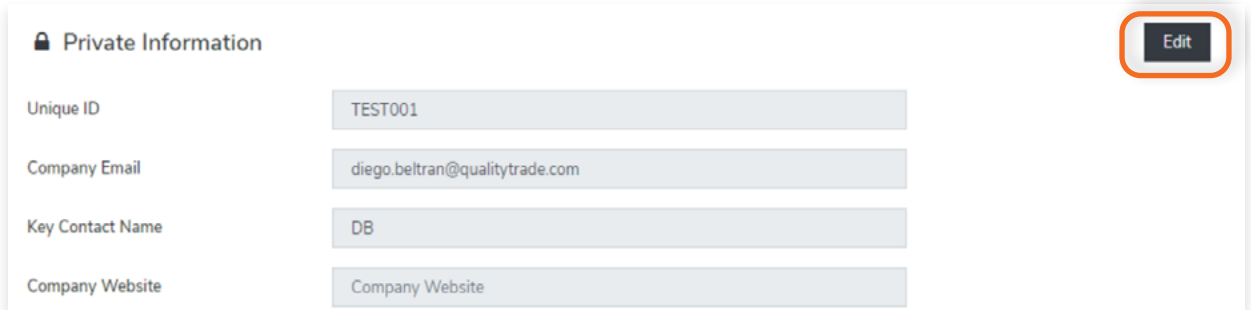Click **"+Add Certified Entity"**

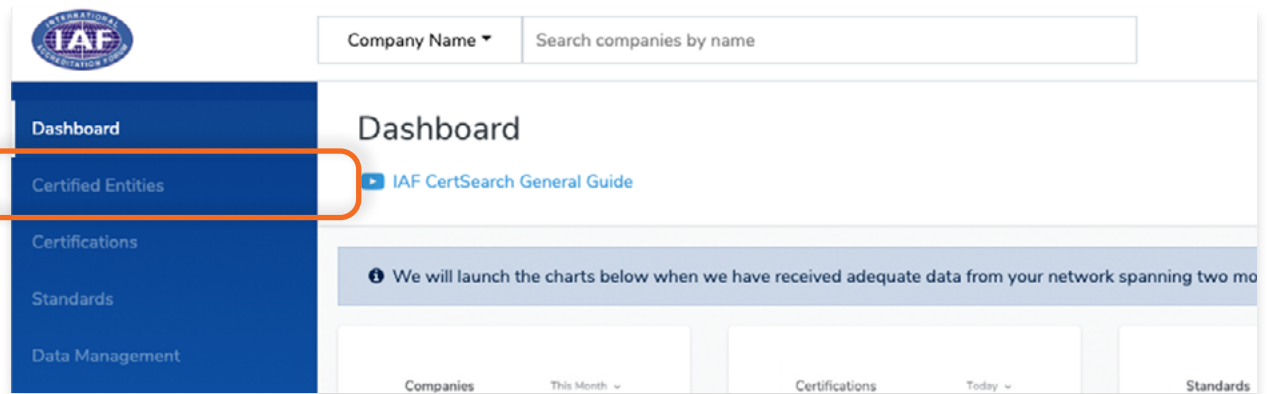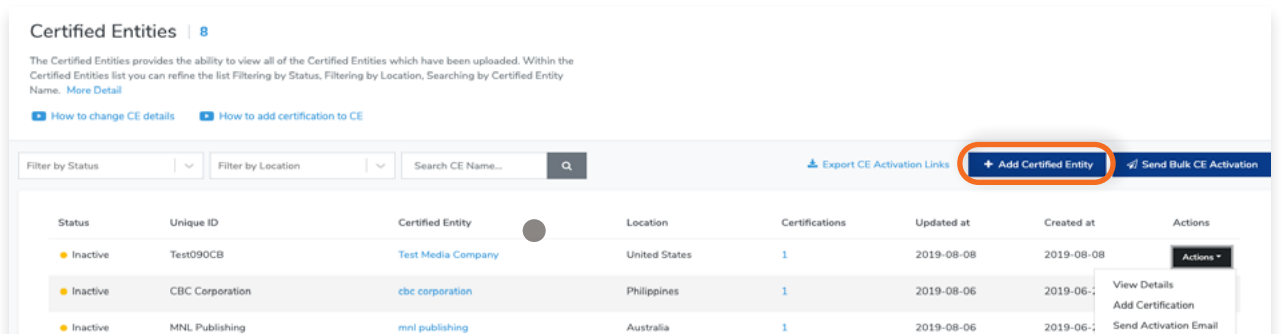Here you can add information of a Certified Entity you wish to include in your database. Please note you must include some basic information of one certification to set up the Certified Entity (Certificate Number, Accreditation Body and Standard).

Step 3

Once all the information has been entered, click **Submit.**
A confirmation text will pop up indicating that the Certified Entity Information have been added successfully.
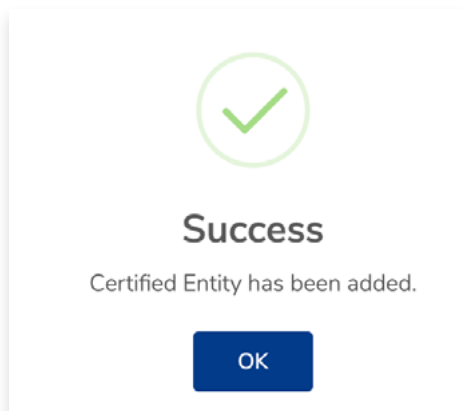
3.5   Activating Certified Entities

View the step by step guide below or watch the videos to find the most suitable way for Certified entities to receive their invitations links to activate their account.

Each Certified Entity receives their own account where they can review their certifications, receive enquiries, customise their company profile, obtain their IAF CertSearch digital mark and access their trade marketplace account.

A certified entity needs to receive their customised link to activate. They can receive their link via invitation email or directly from the CB.

To check the email address go to the Details page of the Certified Entity. Follow the instructions below:

3.3 How to change Certified Entity Details

To edit the email address go to the Details page of the Certified Entity. Follow the instructions below:

3.3.5 How to edit Private Information

3.5.1   How to Send an Activation Email to a Single Certified Entity

View the step by step guide below or watch the video guide here:
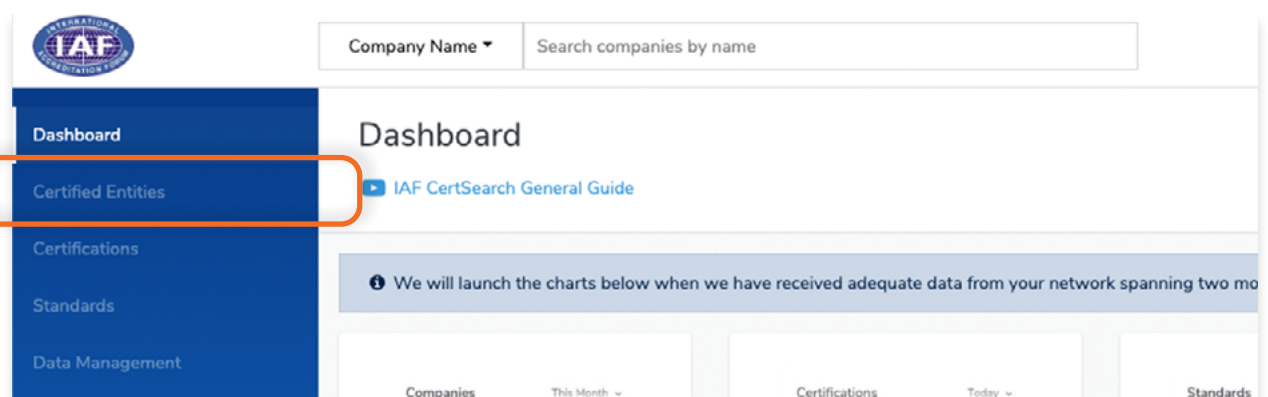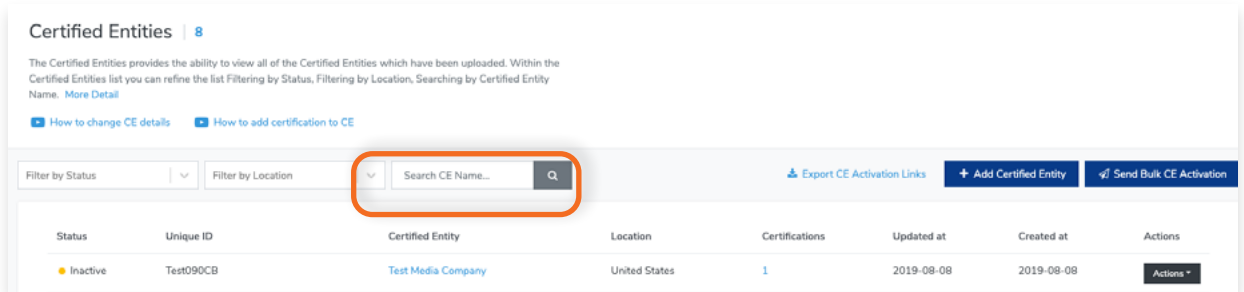
https://youtu.be/I_yhMC4H1tA

Step 1

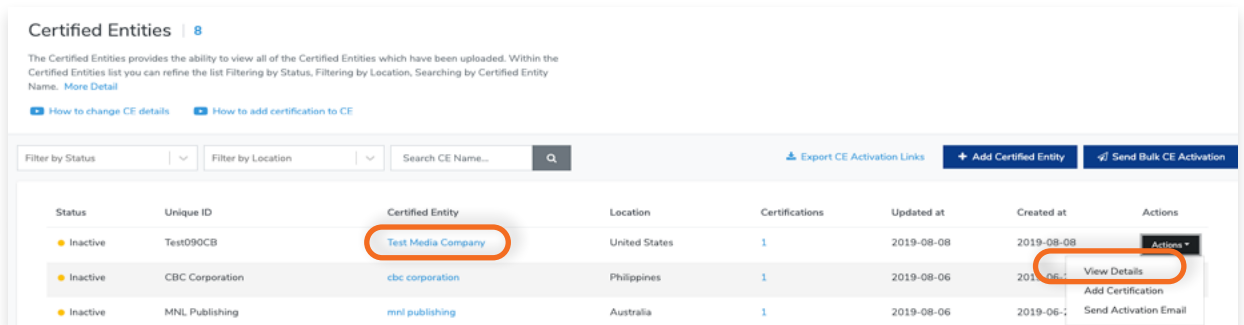From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

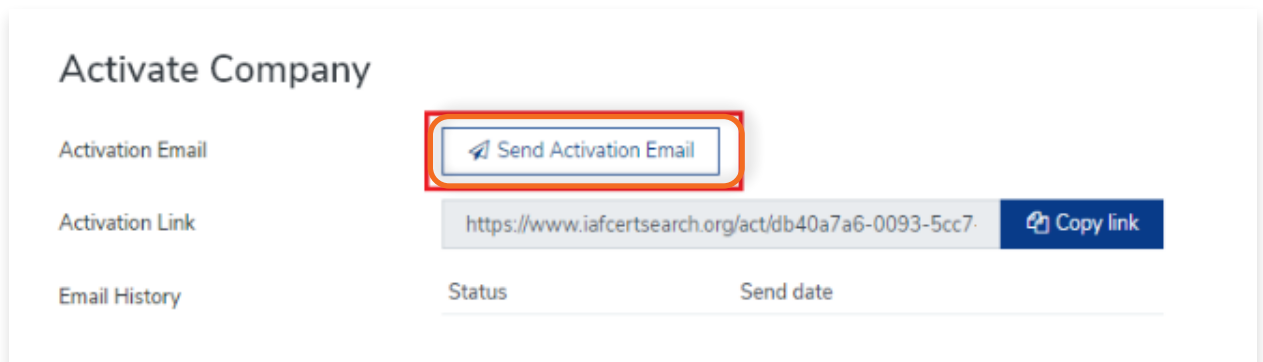In the Certified Entities page, Search for the Certified Entity you want to activate.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**
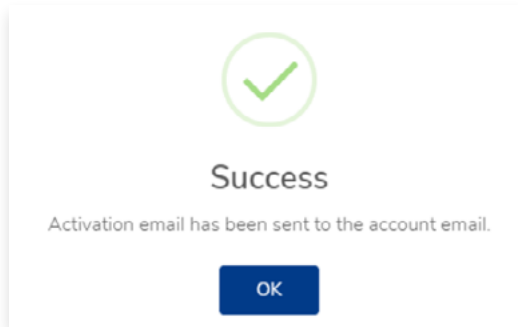

Step 4

Click **Send Activation Email** button.

Step 5

A confirmation will appear when the invitation has been sent.

NOTE:
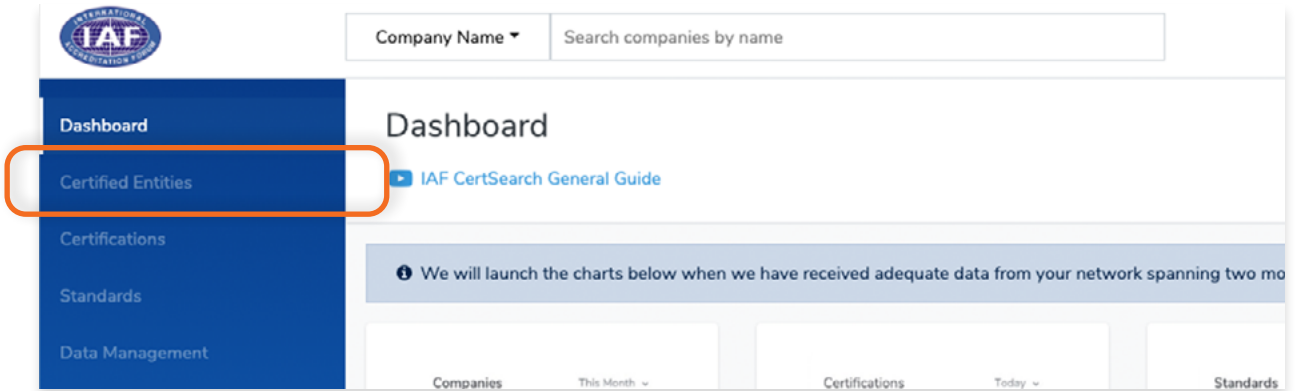Sent date for Email Activations are recorded/logged in Email History.

You can send activation links to all your inactive Certified Entities by bulk.
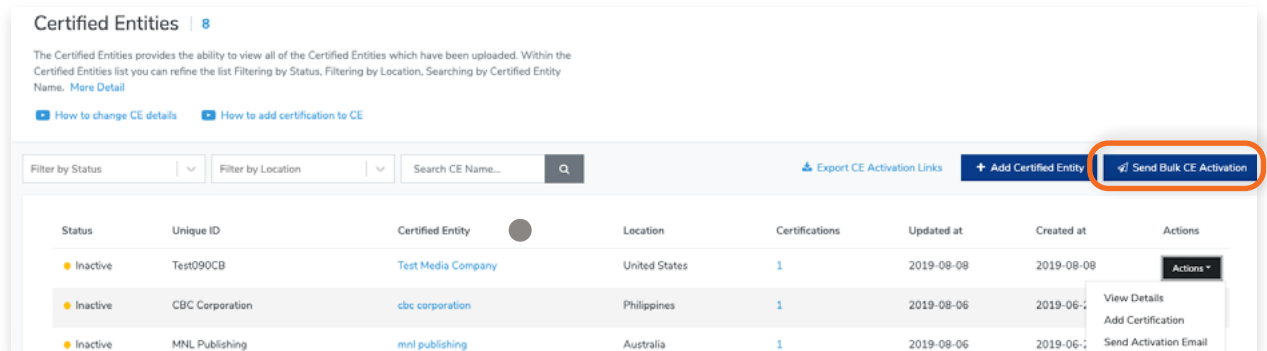
Step 1

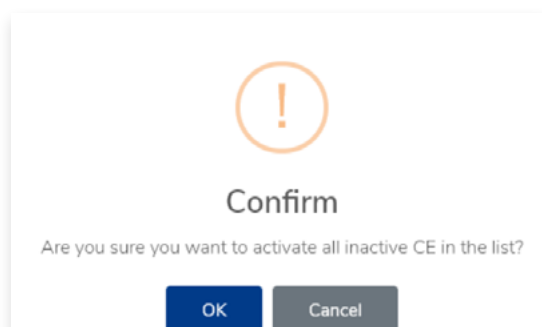From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

Click **Send Bulk CE Activation**

Step 3

A confirmation box will appear to confirm your action. Click OK to proceed or Cancel to abort the operation.
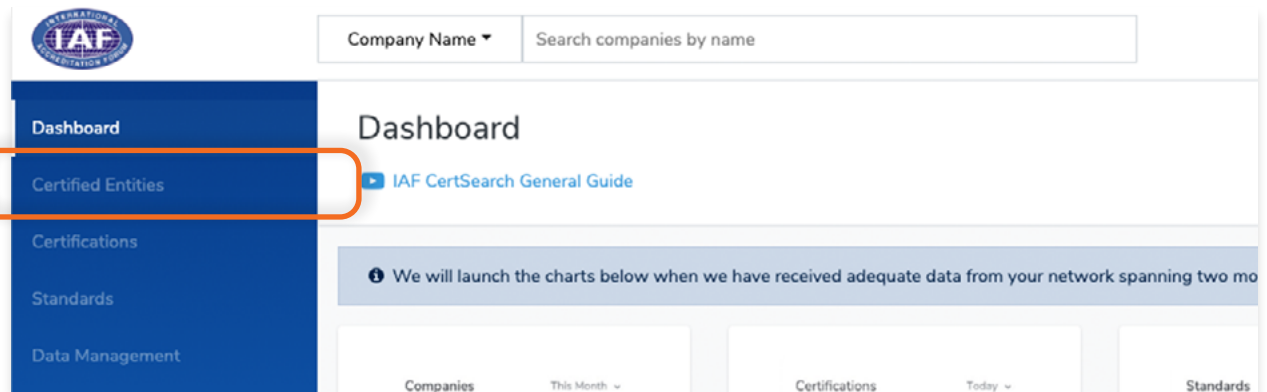
View the step by step guide below or watch the video guide here:

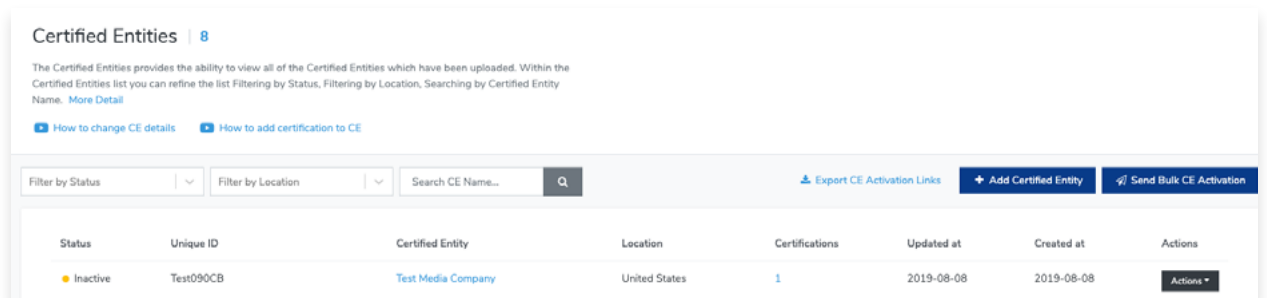https://youtu.be/I_yhMC4H1tA

Step 1

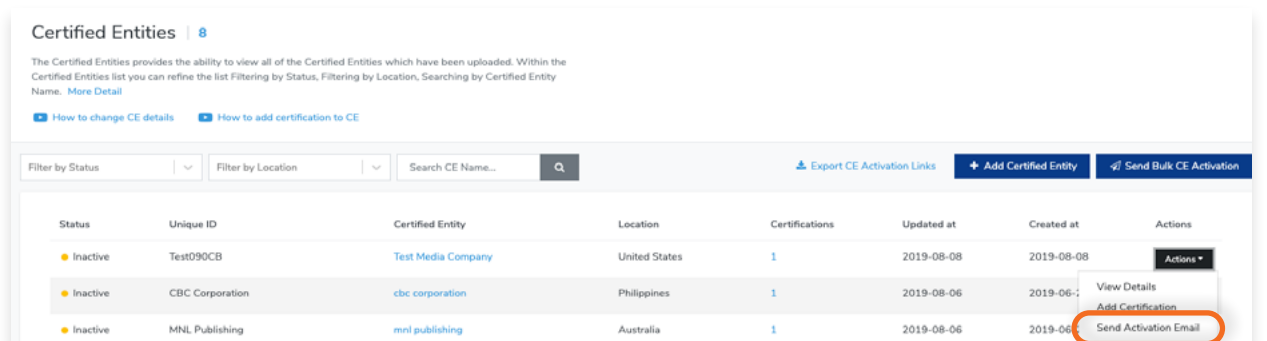From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

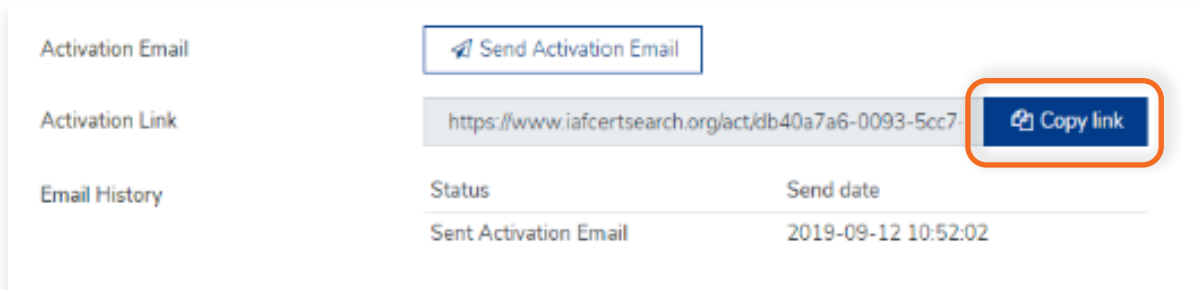Find the Certified Entity you wish to activate.

Step 3

Click **Actions** and select **Send Activation** Link

Click **"Copy link"** and send the link to the Certified Entity directly. Export links are valid for one month and then they expire and a new link will be generated.

3.6.1 How to Export Activation Links for All Certified Entities

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

https://youtu.be/BeRQKk39mFM
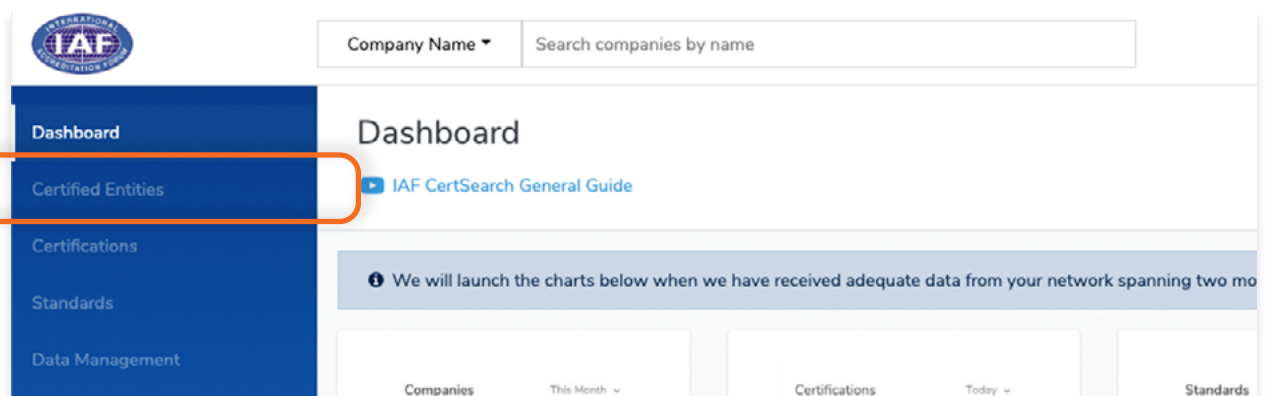
You can export a list of your inactive Certified Entities and their unique Activation Link.

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

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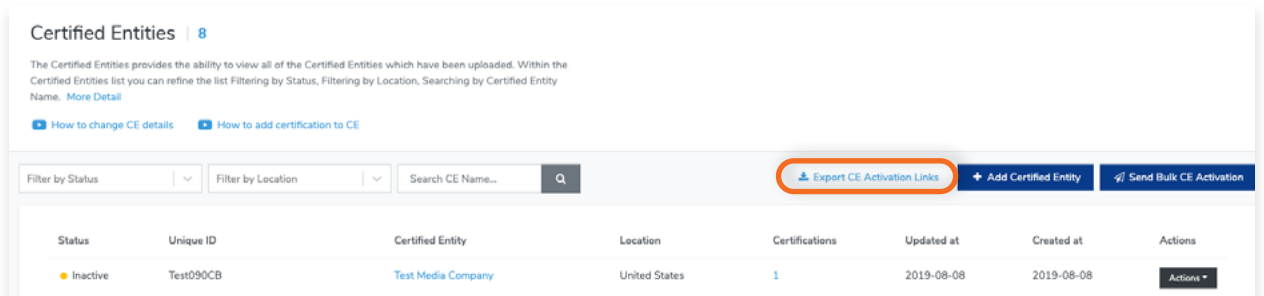
A CSV (Comma Separated Values) file will automatically download. You can open this file using Microsoft Excel or any similar application or program. Once the file is open, you will see the Inactive Certified Entity in Column A and the corresponding Activation Link in Column B. Keep in mind that these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

	A	B
1	TBP Co	https://www.iafcertsearch.org/act/39f2ee2e-ce85-5f91-ac23-e830f839bbaf
2	Test Media Company	https://www.iafcertsearch.org/act/db40a7a6-0093-5cc7-abfd-5ba340dc0471
3		

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

Step 3

Instruct the Certified Entity you wish to send the Activation Link to paste the link to a web browser

Step 4

Once the Certified Entity enters the link, they will be directed to the Activation page.

Click **"Copy link"** and send the link to the Certified Entity directly. Export links are valid for one month and then they expire and a new link will be generated.

Step 5

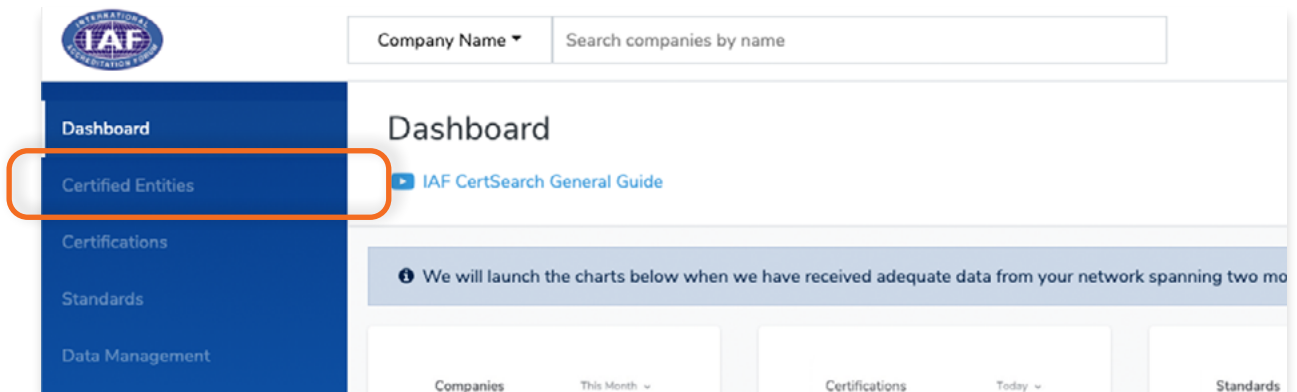After creating an account, they will be able to log in the IAF CertSearch

3.7 How to Edit Certification Details of a Certified Entity

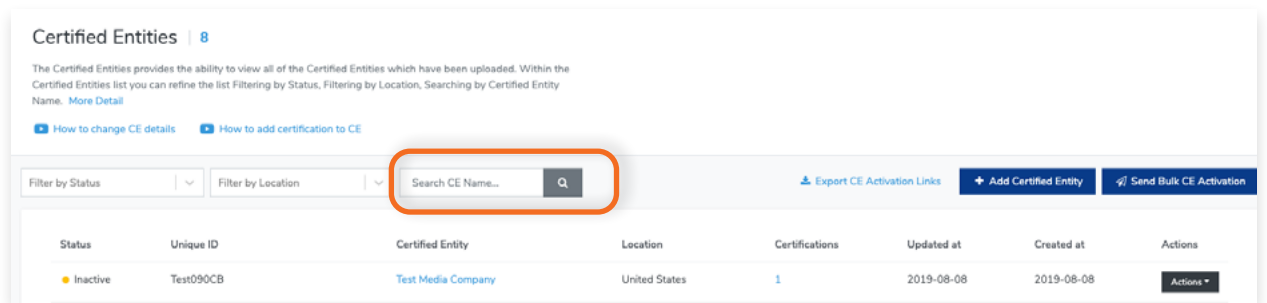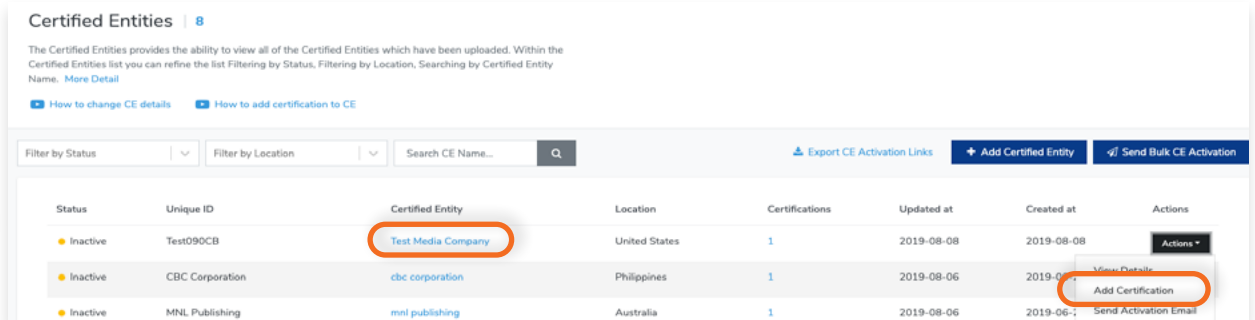View the step by step guide below or watch the video guide here:

https://youtu.be/ijfEHOIuJtU

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

Find the Certified Entity you wish to edit.

Step 3

Either **click on the Certified Entity Name** or **click actions** and **select View Details.**

Step 4

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

Step 5

Find the Certification you wish to edit. Click the **Certification Number** or click **View.**

Step 6

Click **Edit.**

Step 7

Here you can edit the Certification Status, Accreditation Body, Standard, Certificate Number, and Scope Description.

You can also edit the Issue Date, Expiry Date, and Original Issue Date.

Step 8

Click **Submit** to save changes or **Cancel** to revert changes.

3.8 How to Add Certification to a Certified Entity

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

https://youtu.be/DYqNoXVuAlk

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

Find the Certified Entity you wish to add a Certification to, then click **Action** and select **Add Certification.** *

Step 3

Alternate step to add certification

Click the Certified Entity you wish to add a certification to, go to the "Certifications" tab in the top menu, click + Add Certification

Step 3

Now you can add Certification under the Certified Entity.

You can select the Certification Status, Accreditation Body, and the Accredited Standards. Enter the Certificate Number and Scope Description. Enter the Issue Date, Expiry Date and Original Issue Date.

Certified Entities / reliable logistics services... / Certifications / Create a Certifications

reliable logistics services inc.

Details   Certifications   Live Profile

Status

Certification Status   Active   ⬍

Public Information

The certification information will appear on the profile page.

Accreditation Body   Accreditation Bodies

Standard   Select a Standard

Certificate Number   Certificate Number

Scope Description   Scope Description

🔒 Private Information

Issued Date, Expiry Date and Original Issued Date will be private.

Issued Date   YYYY-MM-DD

Expiry Date   YYYY-MM-DD

Original Issued Date   YYYY-MM-DD

Step 8

Click **Submit** to add Certificaton.

✅

4. Certifications

4.1   Where Can I View All Certifications Uploaded

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

https://youtu.be/4ybJMYRJ9JA

From the Dashboard, click Certifications in the left hand navigation.
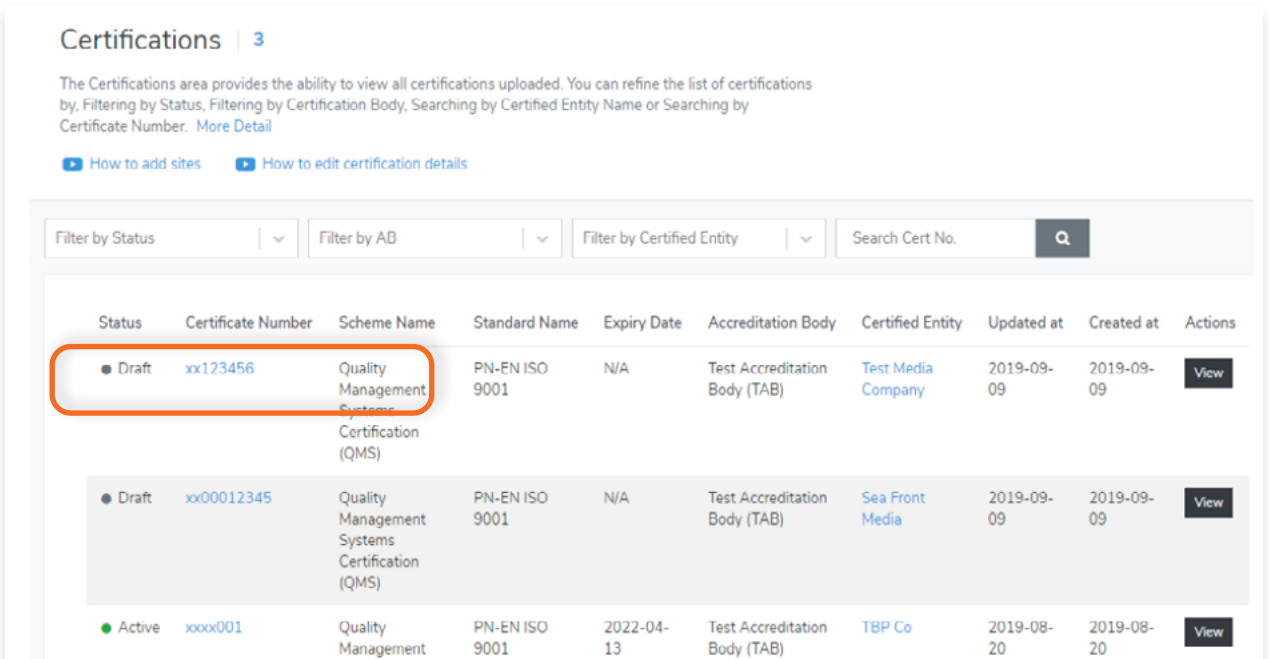
Step 1

From the Dashboard, click **Certifications** in the left hand navigation.
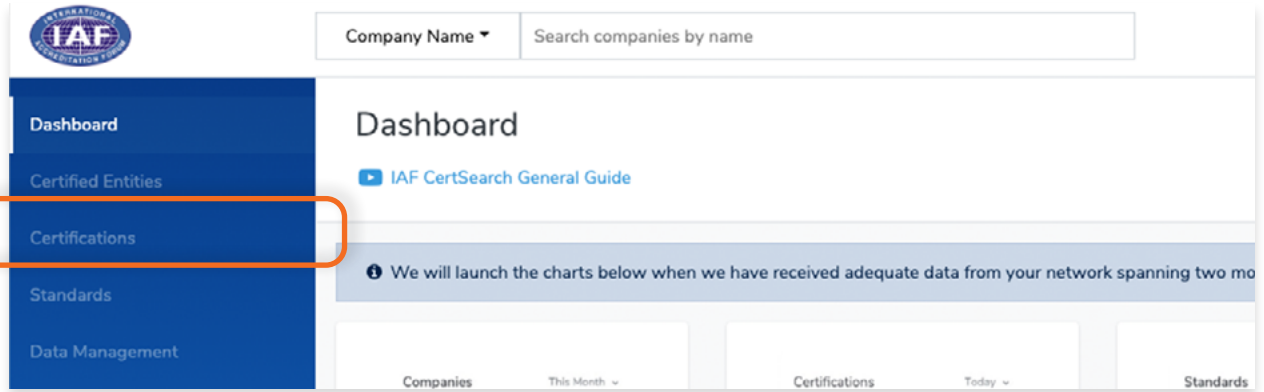
Here you will see all Certifications.

You can filter by Status, Accreditation Body, Certified Entity Name, or search by Certificate number.

The list will include the following fields for each Certified Entity:

- **Status –** indicates if a certified entity is active or inactive in IAF CertSearch
- **Unique ID –** The Certified Entity Unique ID, issued by the CB to identify the organisation
- **Certified Entity –** this is the Certified Entity Name issued by the CB
- **Location –** country location of the Certified Entity issued by the CB
- **Certifications –** shows the number of certifications uploaded for the Certified Entity
- **Updated at –** shows when the Certified Entity data was last updated
- **Created at –** shows when the Certified Entity record was created
- **Actions –** the action button enables the CB to click and view Certified Entity Details, Edit or Add new Certifications and send Activation invitation links to a Certified Entity

4.2   How to Edit Certification Details

View the step by step guide below or watch the video guide here:
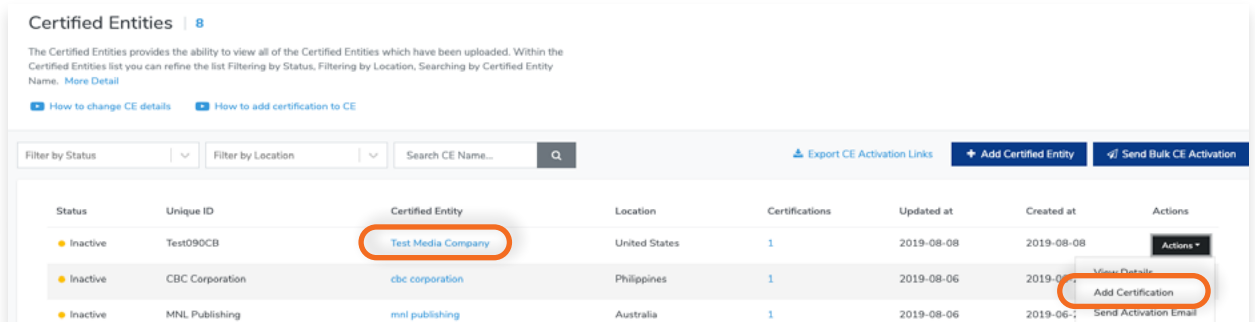
https://youtu.be/yJpaVt5QXo0

Step 1

From the Dashboard, click **Certifications** in the left hand navigation.

Step 2

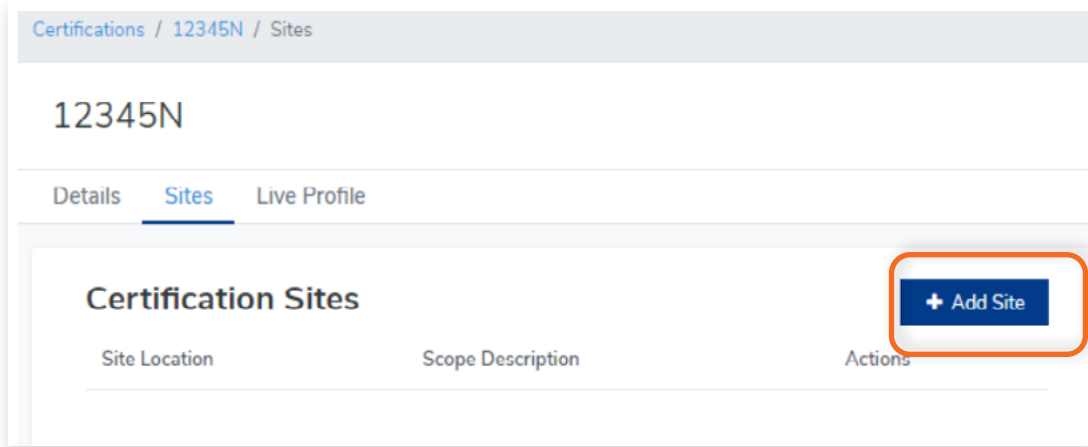Find the Certification you wish to edit. Click the **Certification Number** or click **View**.

Step 3

Here you can edit the Certification Status, Accreditation Body, Standard, Certificate Number, and Scope Description.

You can also edit the Issue Date, Expiry Date, and Original Issue Date.

Step 8

Click **Submit** to save changes or **Cancel** to revert changes.

4.3   How to add a Certification to a Certified Entity

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

https://youtu.be/DYqNoXVuAlk

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

Find the Certified Entity you wish to add a Certification to, then click **Action** and select **Add Certification.** *

Step 3

Alternate step to add certification

Click the Certified Entity you wish to add a certification to, go to the "Certifications" tab in the top menu, click + Add Certification

Step 3

Now you can add Certification under the Certified Entity.

You can select the Certification Status, Accreditation Body, and the Accredited Standards. Enter the Certificate Number and Scope Description. Enter the Issue Date, Expiry Date and Original Issue Date.

Step 8

Click **Submit** to add Certificaton.

4.4 How to Add a Site Location to a Certification

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

https://youtu.be/DYqNoXVuAlk

Step 1

From the Dashboard, click **Certified Entities** in the left hand navigation.

Step 2

Find the Certification you wish to add a site location. **Click the Certification Number** or click **View**.

Step 3

Click the **Sites tab** in the top menu bar.

Step 4

Click **+ Add Site.**

Step 5

Enter the Address, City, State, Postcode, Country/Economy and Scope Description. Note the Scope Description is the scope specific for this site.

Step 6

Click **Submit** to add Certificaton.

5. Standards

5.1 How to View Standards

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

https://youtu.be/nEZfQer5KTA

This feature allows you to view the standards issued/uploaded by your Accreditation Bodies.

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

Step 1

From the Dashboard, click **Standards** in the left hand navigation.
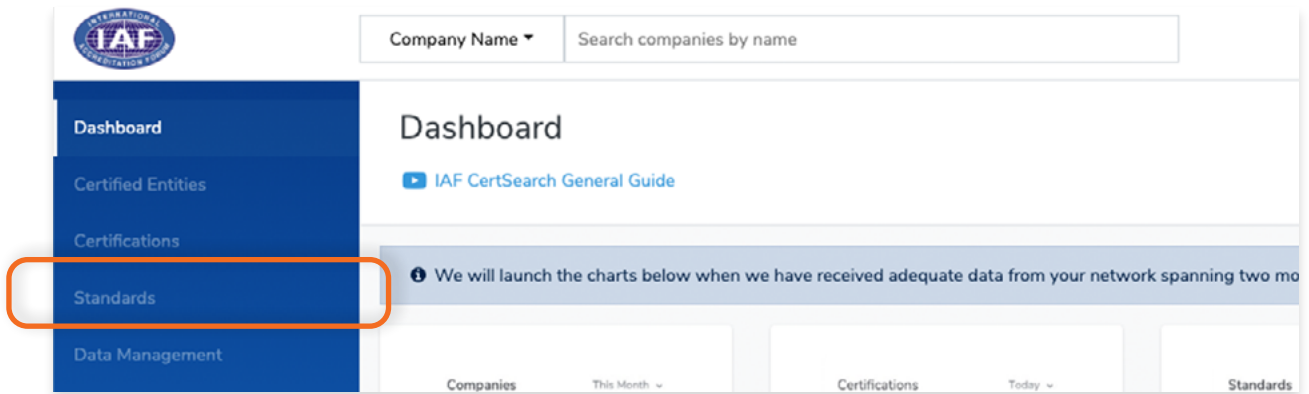
Step 2

View the standards that have been assigned to the CB by the Accreditation Bodies.
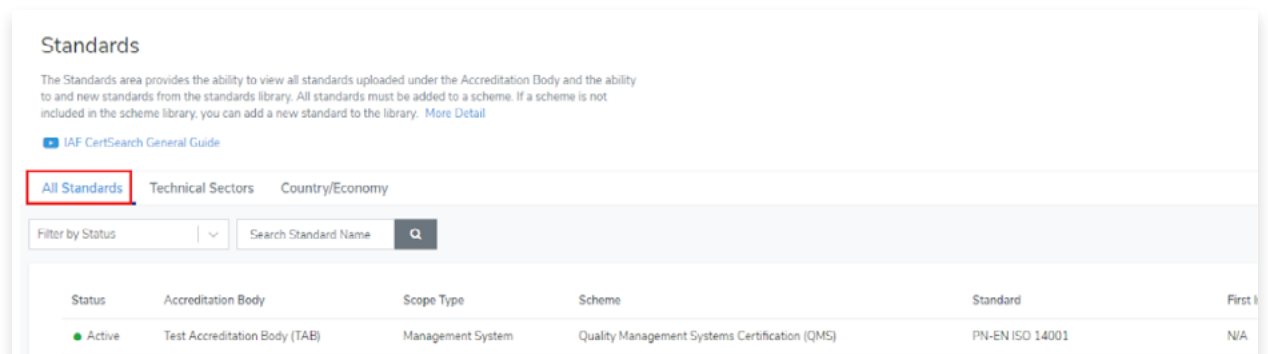
If there is a missing standard in your database, contact your Accreditation Body. They will be able to add the standards. if the standards are not included then certifications issued by your certification body to certified entities will not be included into the database so it is critical that all of your accredited standards are correctly listed.

The accredited standards will also be displayed on the Certification Body Profile.

Click here to learn more about adding new or missing Standards:

https://youtu.be/VY-9RJbKTM4

5.2 How to View Technical Sectors

Step 1

From the Dashboard, click **Standards** in the left hand navigation.
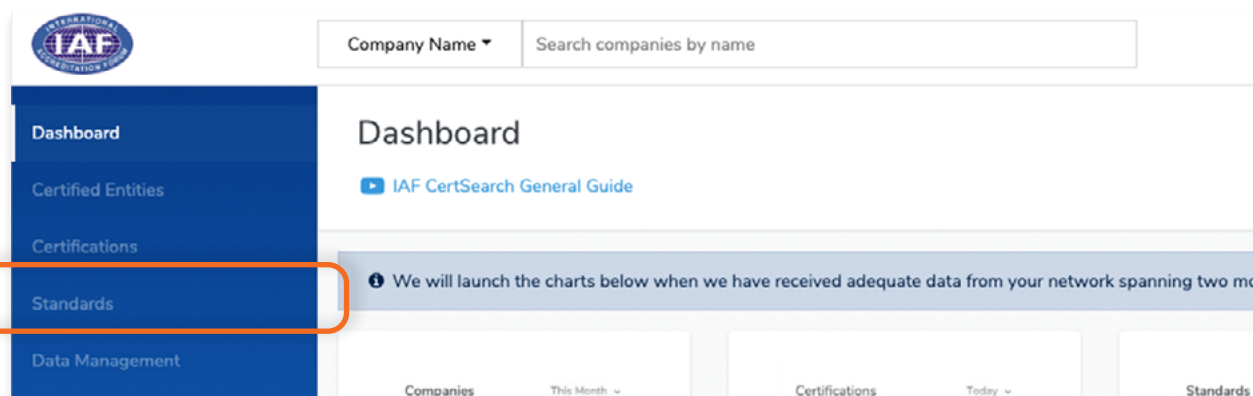
Step 2

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

View the technical sectors which have been assigned by your Accreditation Bodies.
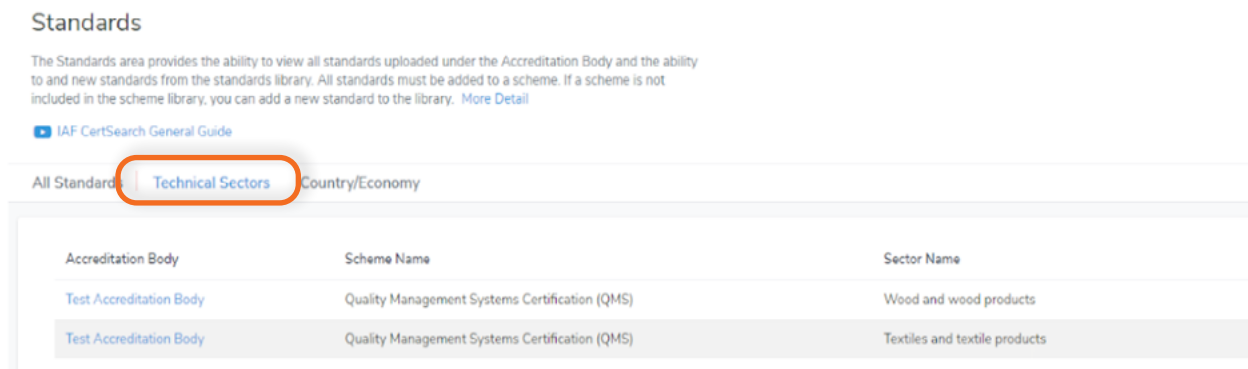
If there is a missing technical sector in your database, contact your Accreditation Body. They will be able to add the technical sectors for you. The Technical Sectors will also be displayed on the Certification Body

Step 1

From the Dashboard, click **Standards** in the left hand navigation.
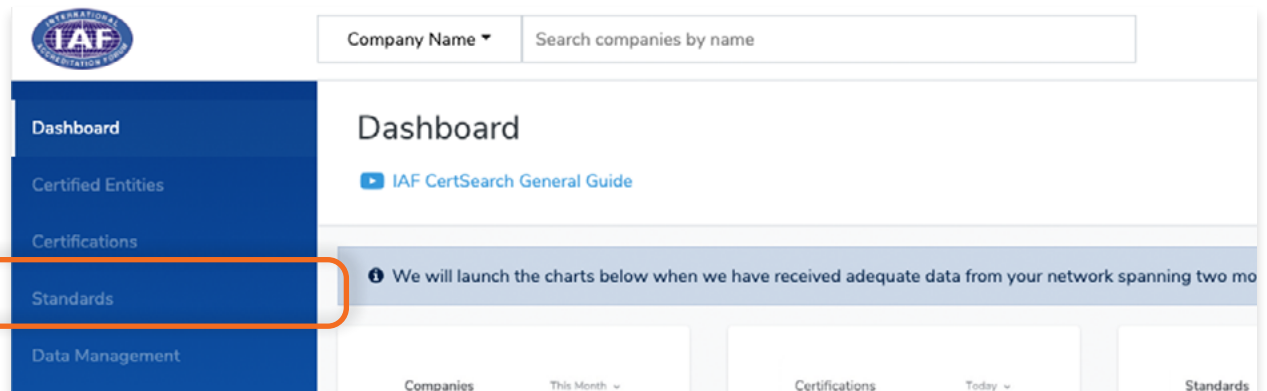
Step 2

Click **Country/Economy** tab in the menu bar.
Here you will be able to view the Country/Economy in which you are eligible to issue accredited certificates as assigned by your Accreditation Bodies.
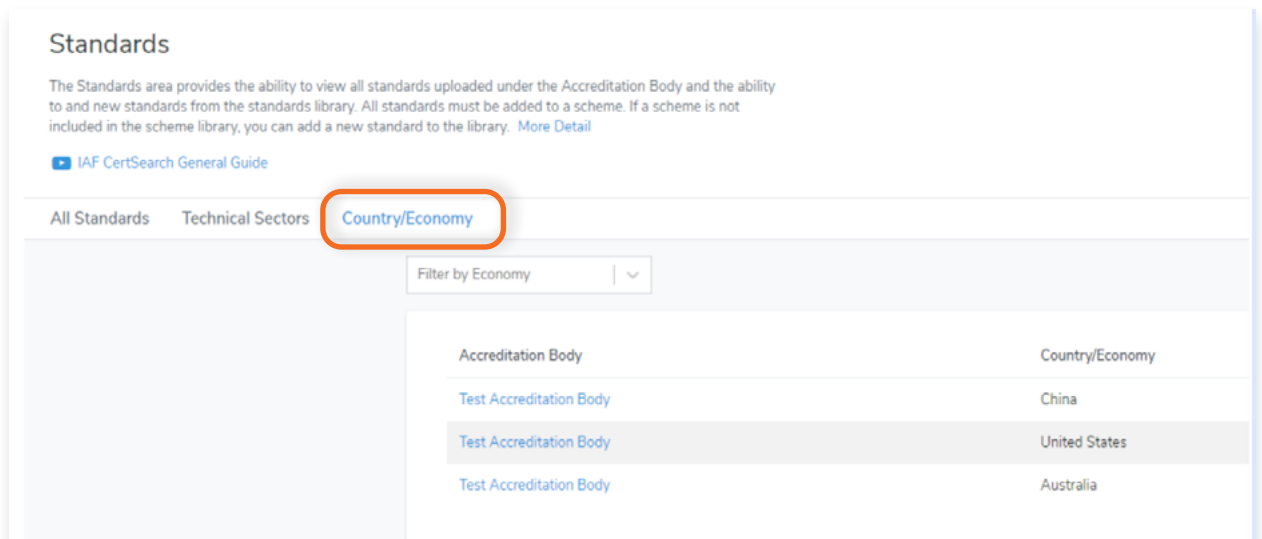
If there is a missing Country/Economy in your database, contact your Accreditation Body. The Country/Economy list will also be displayed on the Certification Body Profile.

6. Data Management

6.1   Overview of Data Management

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

https://youtu.be/d2quRw6yYeY

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

From the Dashboard, click **Data Management** in the left hand navigation.
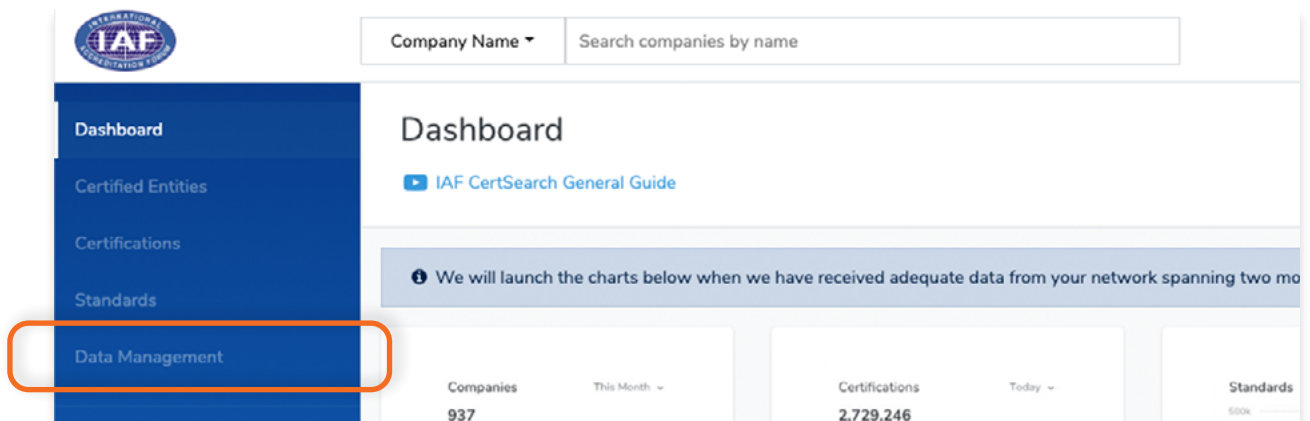
The Data Management feature is where you upload data. It provides access to the manual and automated upload processes.

- •   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 -
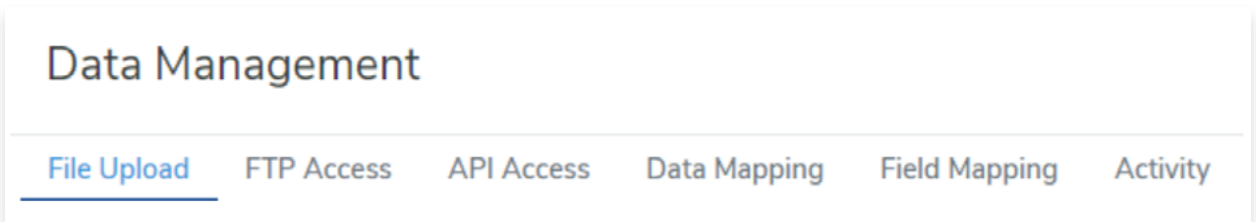
6.2   How to Prepare Certification Data Using Excel

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=nljAsWP_Hyw
This section will show you where to find the Instructions on how to prepare your data in Excel.

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
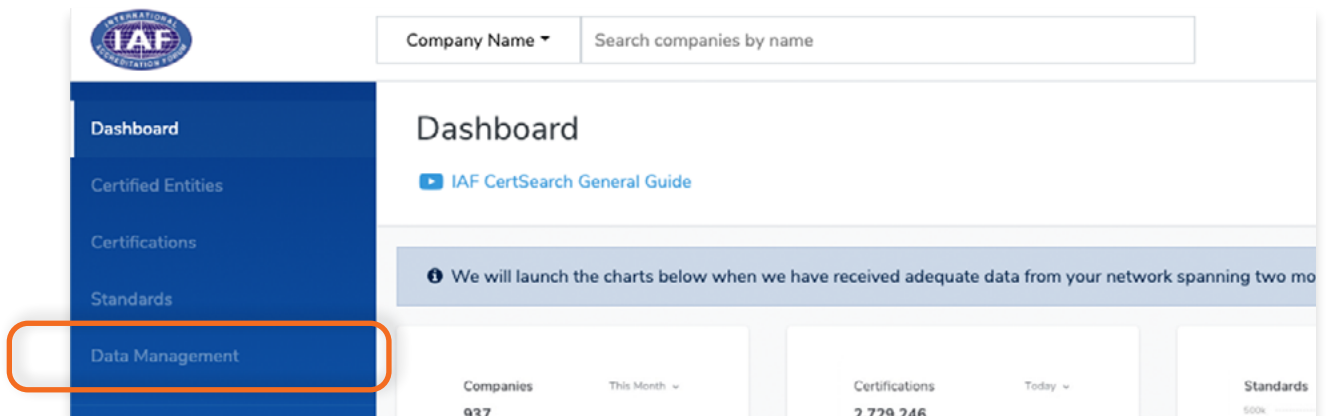
Step 2

Click Excel **Data Instruction** under Data Instruction
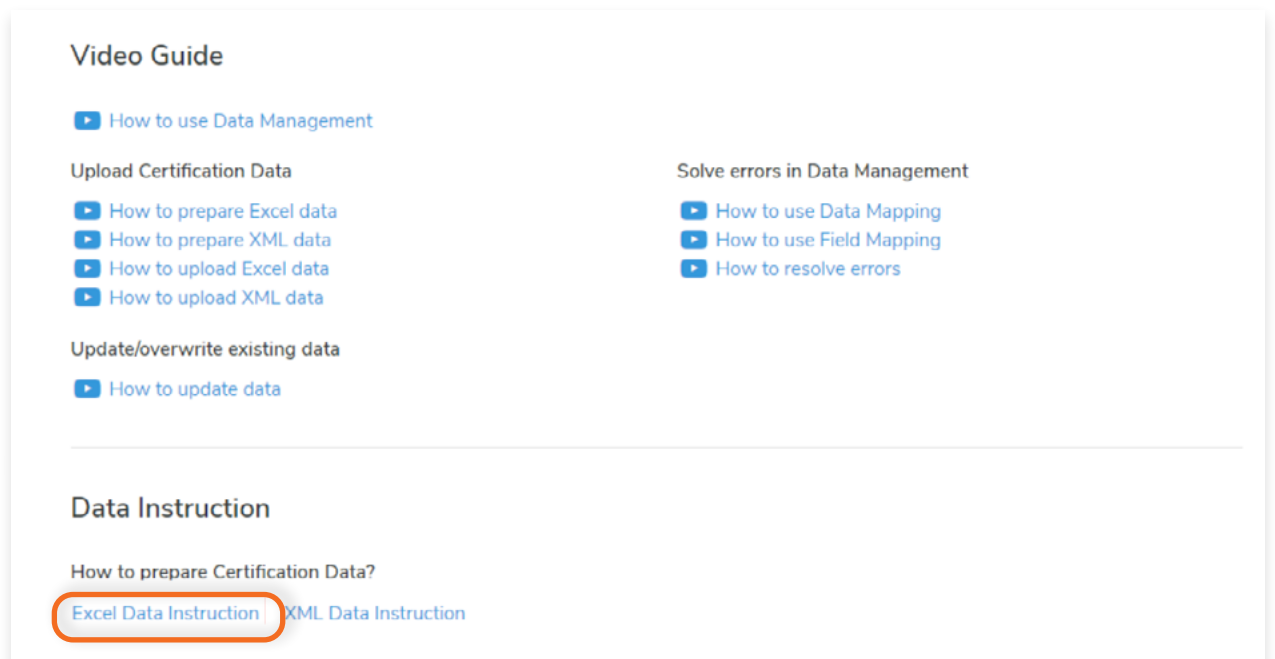
Step 3

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.

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.

6.3 How to Download and Populate Certification Data Template in Excel

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

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
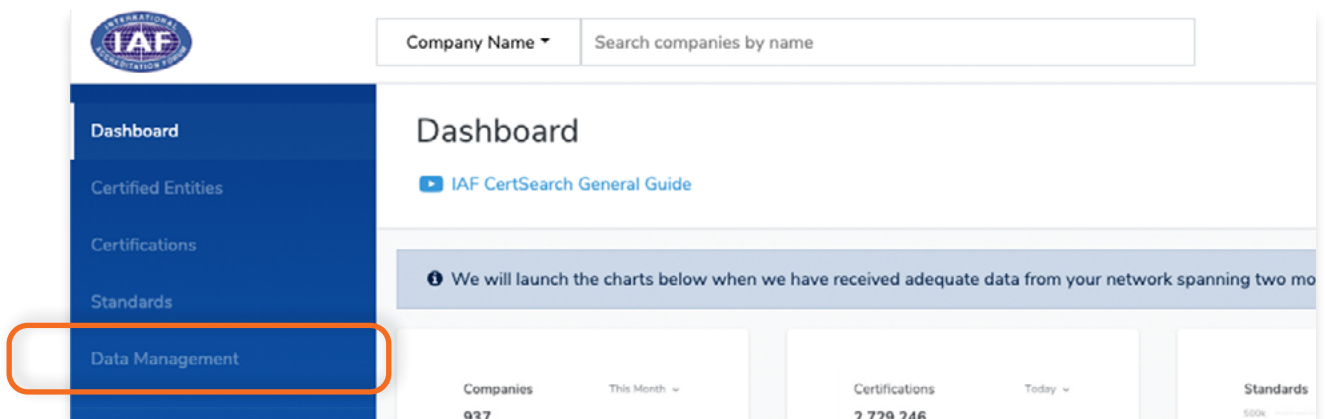
Step 2

Click **Excel Template** under Download Data Templates
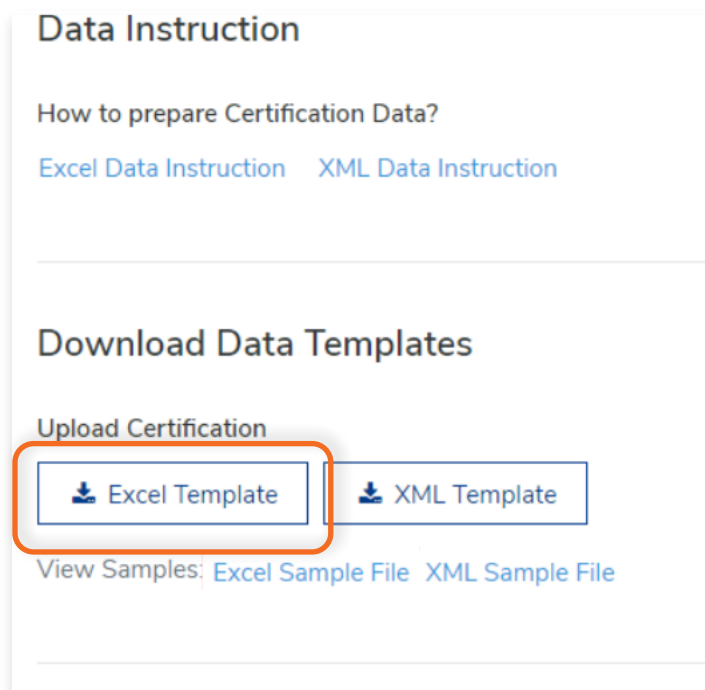
Step 3

Once clicked, it will automatically download the Excel template. It can be opened using Microsoft Excel or any other similar program.

Step 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.

Step 5

Save the File.

6.4   How to Prepare Certification Data Using XML

View the step by step guide below or watch the video guide here:
https://youtu.be/Owr9tQ2EMWI
This section will show you where to find the Instructions on how to prepare your data in Excel.

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
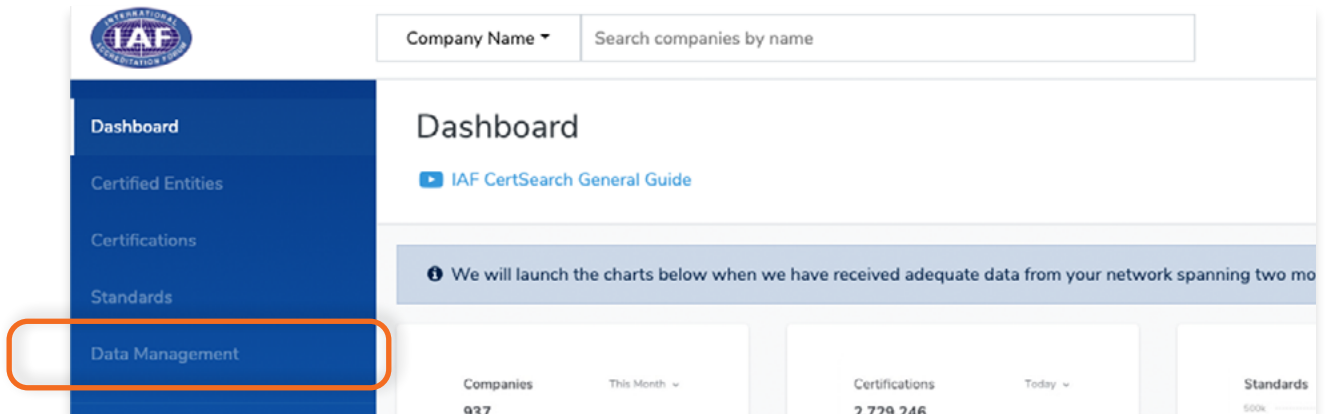
Step 2

Click **XML Data Instruction** under Data Instruction
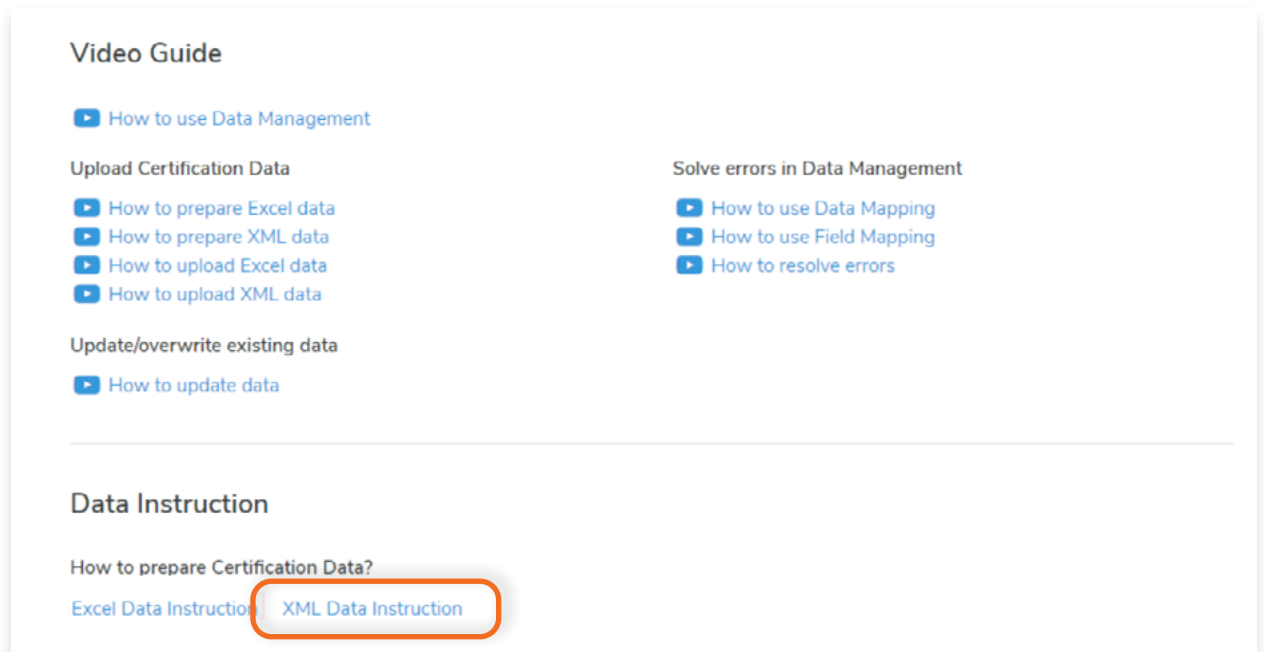
Step 3

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.

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 XMLl 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.

Step 4

Click **Excel Template** under Download Data Templates

6.5 How to Download Certification Data Template in XML

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

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
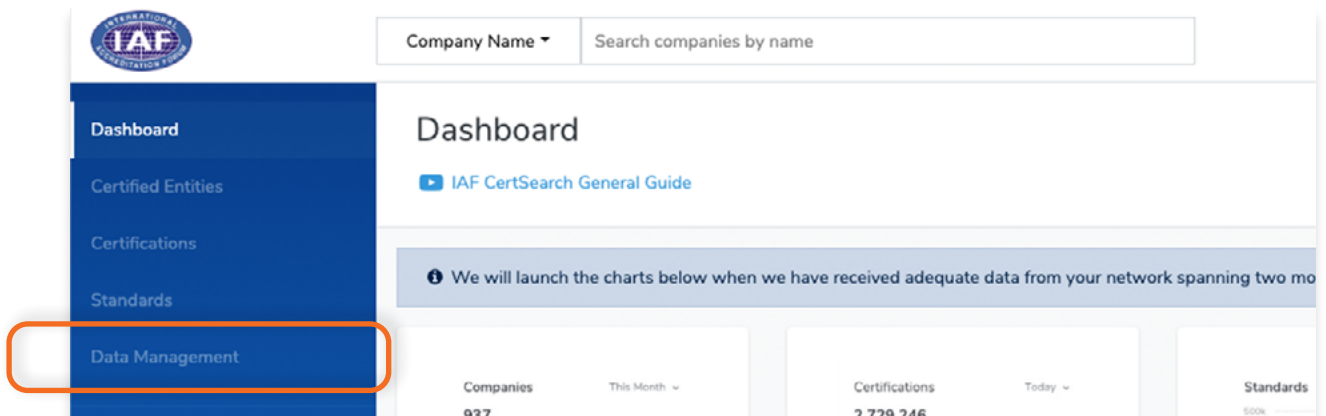
Step 2

Click **XML Template** under Download Data Templates
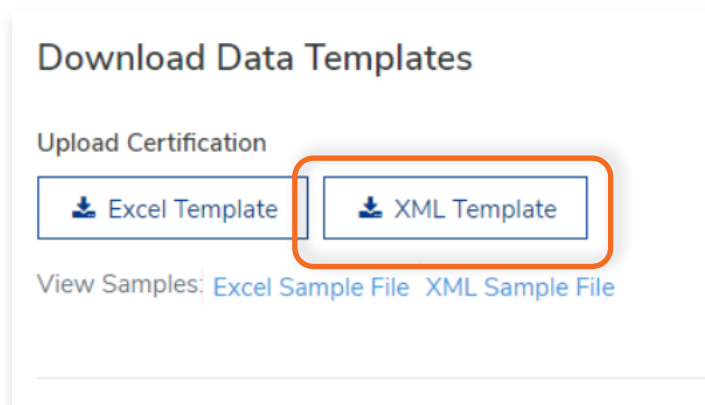
Step 3

Once clicked, it will automatically download the XML template.

Step 4

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

```
<cb_certs>
<certification>
<certificate_identity_number>UNIQUEID-CERT01</certificate_identity_number>
<certificate_number>20897-A01</certificate_number>
<certification_status>Active</certification_status>
<accreditation_status>Accredited </accreditation_status>
<certification_type>Management System</certification_type>
<certification_scope>
Manufacturing, marketing and export of instruments, consumables and accessories for temperature, active oxygen,
measurements and sampling in ferrous and non-ferrous melts
</certification_scope>
<certification_original_issue_date>20170203</certification_original_issue_date>
<certification_issue_date>20170203</certification_issue_date>
<certification_expiry_date>20170203</certification_expiry_date>
<certified_entity_name>Test Food And Logistics Inc.</certified_entity_name>
<certified_entity_trading_name/>
<certified_entity_english_name/>
<certified_entity_email_address>info@testfood.com</certified_entity_email_address>
<certified_entity_key_contact>Mr Peter Smith</certified_entity_key_contact>
<certified_entity_phone>+1 4589 2793</certified_entity_phone>
<certified_entity_unique_id>UNIQUEID-COMPANY01</certified_entity_unique_id>
<certified_entity_street>Suite 100, #3601 E Algonquin Road</certified_entity_street>
<certified_entity_city>Rolling Meadows</certified_entity_city>
<certified_entity_state>Illinois</certified_entity_state>
<certified_entity_zip_code>60008</certified_entity_zip_code>
<certified_entity_country>United States</certified_entity_country>
<accreditation_body_name>Test Accreditation Body</accreditation_body_name>
<accreditation_body_acronym>TAB</accreditation_body_acronym>
<certification_additional_sites>
<additional_site>
<street>505N, Sam Houston Pkwy East, Suite # 682</street>
<city>Houston</city>
<state>Texas</state>
<zip_code>77060</zip_code>
<country>United States</country>
<scope>
Manufacturing, marketing and export of instruments, consumables and accessories for temperature, active oxygen,
```
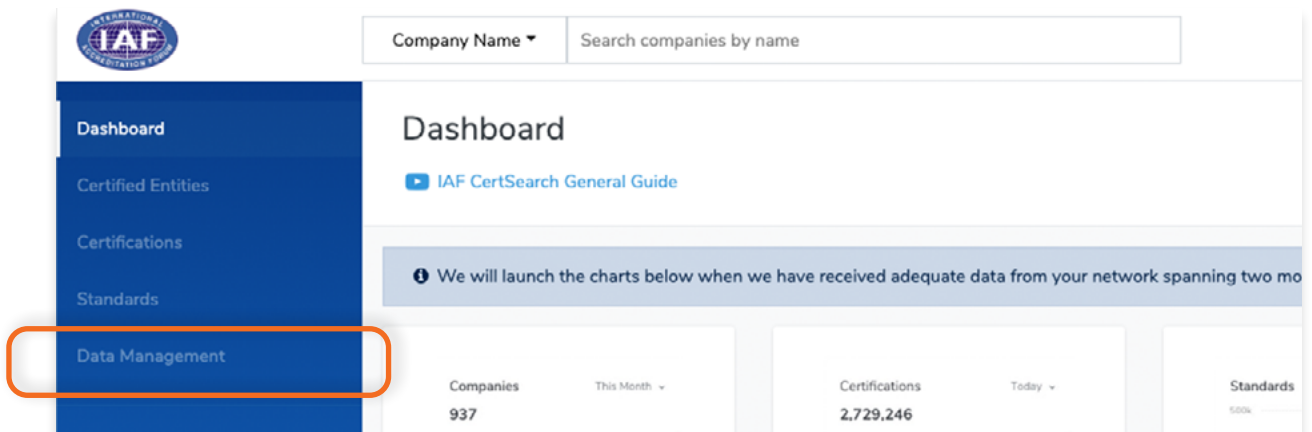
Step 5

Save the File.

6.6 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.

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 Data	Solve errors in Data Management	Update/overwrite existing data
▶ How to prepare Excel data	▶ How to use Data Mapping	▶ How to update data
▶ How to prepare XML data	▶ How to use Field Mapping	
▶ How to upload Excel data	▶ How to resolve errors	
▶ How to upload XML data		

Data Instruction

How to prepare Certification Data?

Excel Data Instruction   XML Data Instruction

Download Data Templates

Upload Certification

[⬇ 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 Certifications]

The File Upload section will provide you with video guides to help you in uploading your Certification data.

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
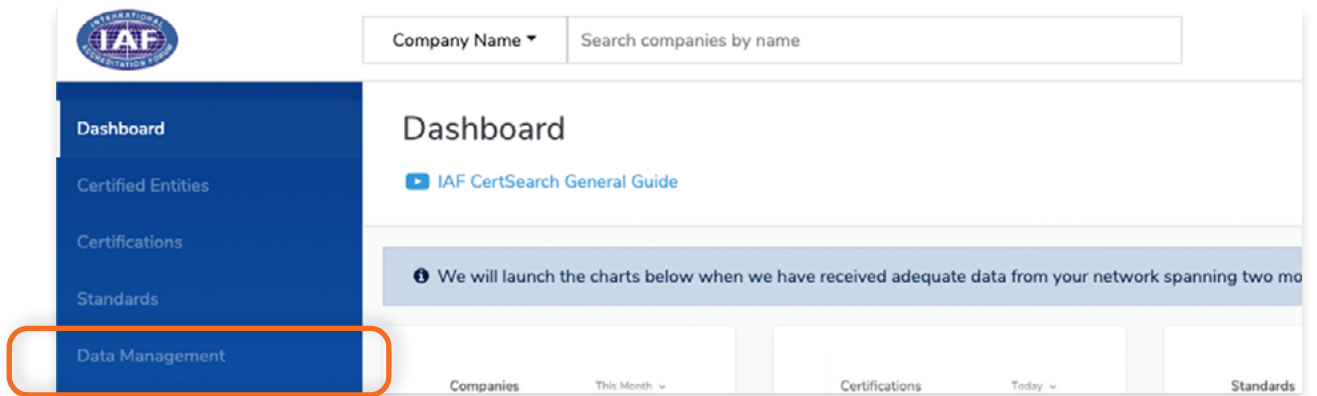
Step 2

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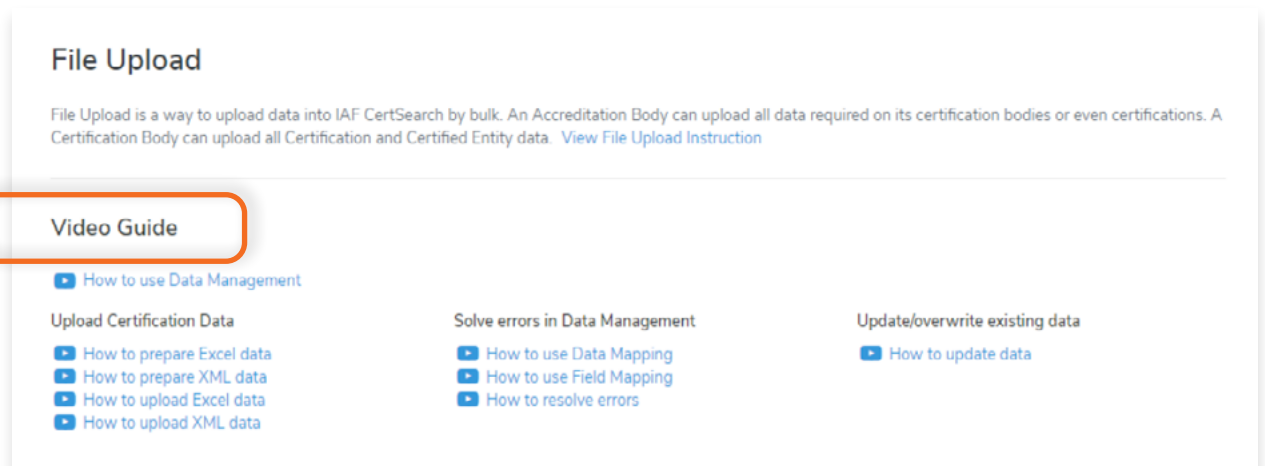
There will be a different video guides in this section that will discuss the overview of data management, preparing and uploading Excel and XML data, solving errors, and updating/overwriting existing data.

■ 6.6.2   How to Upload Certification Data in File Upload

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

Excel file upload: https://www.youtube.com/watch?v=9phzLW4jXPc

XML file upload: https://www.youtube.com/watch?v=FJhc2NXvv6A

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
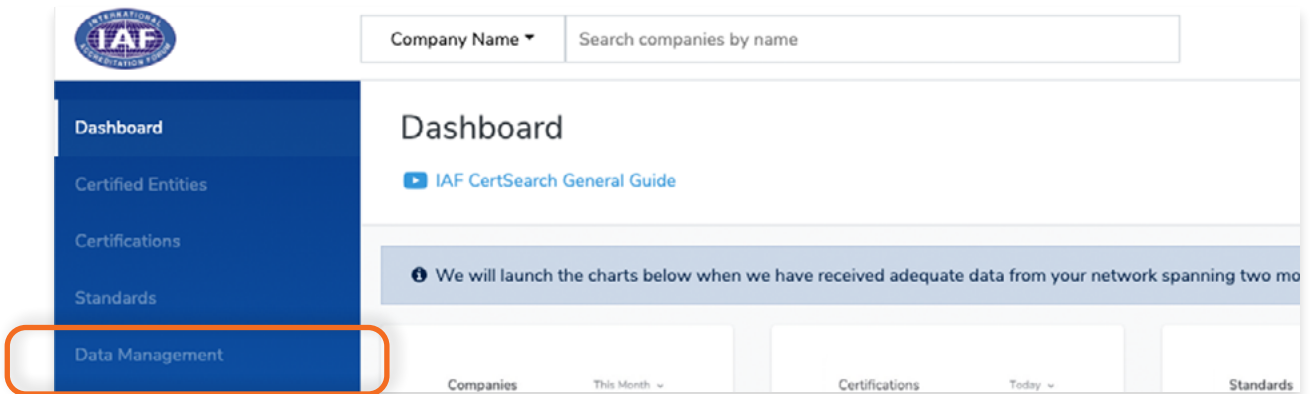
Step 2

Scroll to the bottom of the page and click **Upload Certifications**
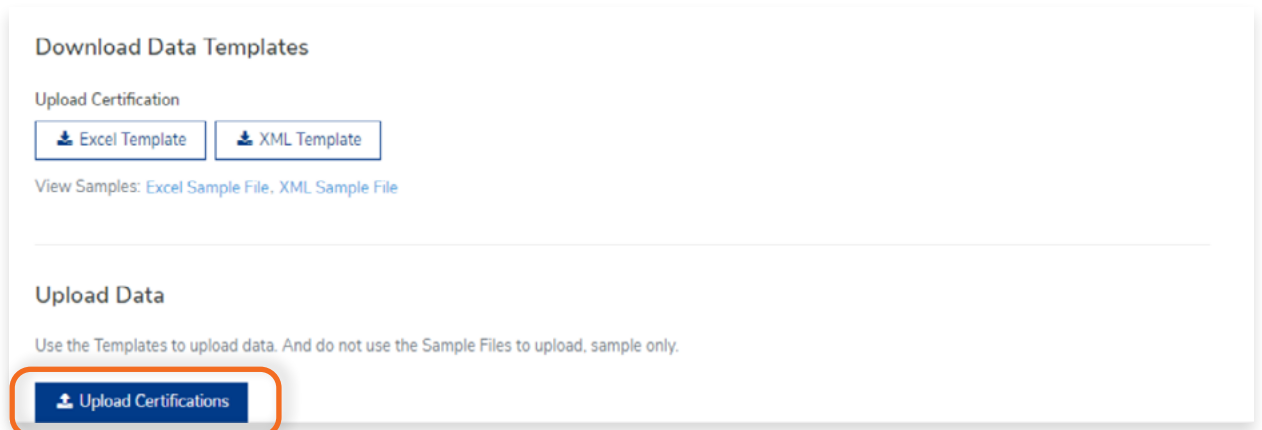
Step 3

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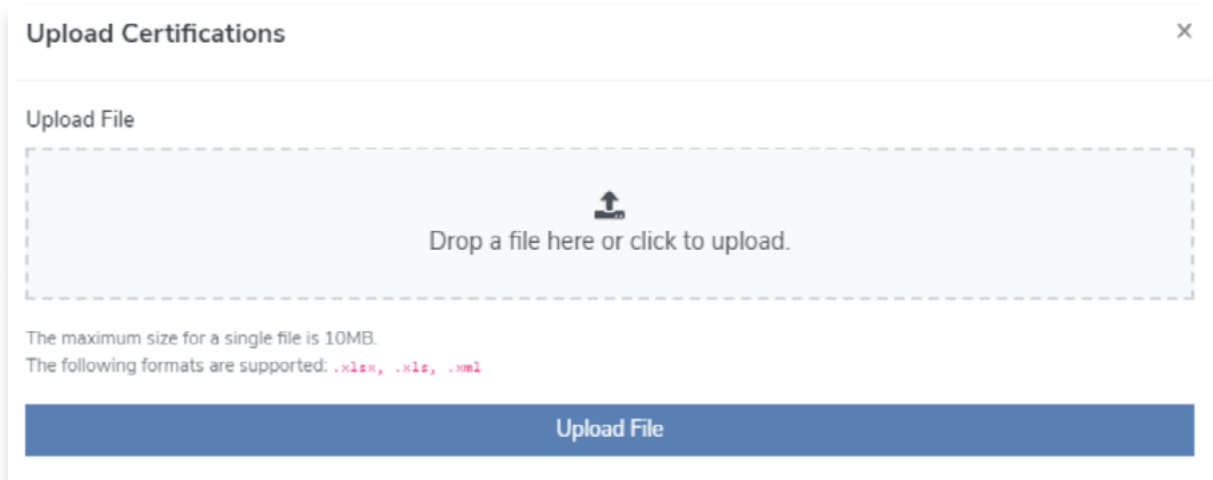
Once file is selected, click **Upload File** and your data will be uploaded. The maximum size for a single file is 10MB. If you have a file that is larger than 10MB, it is best that you segment your file into smaller file sizes.

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.

6.6.3   How to Update Certification Data Using 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/dWEYq6WeA-w

Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
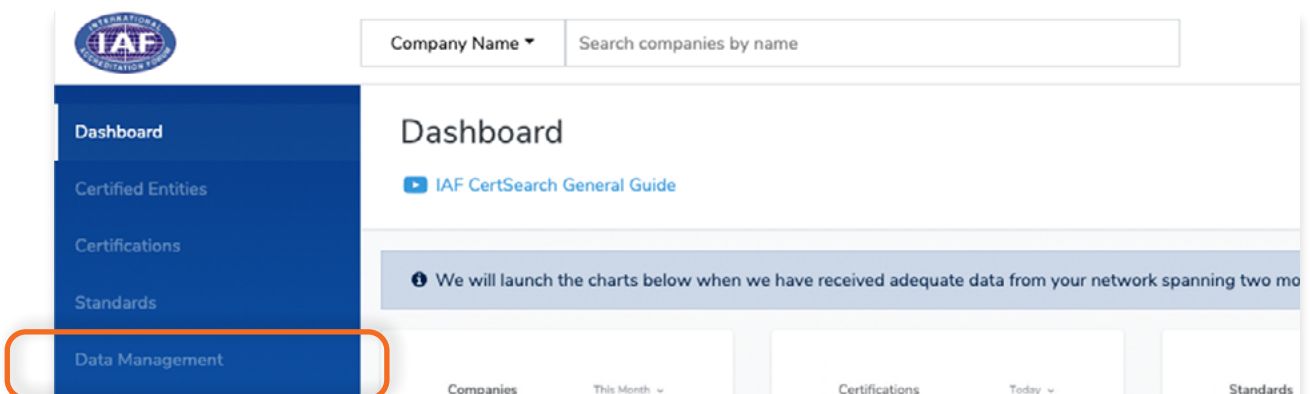
Step 2

For this example, we will update the location of "reliable logistics services inc" from United States to Australia.

Step 3

Open the template you used to upload this data.

Step 4

Find the data you wish to update.

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

Make the changes.

Step 5

Save the File.

Step 6

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

Step 7

Scroll to the bottom of the page and click **Upload Certifications.**

Step 8

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.
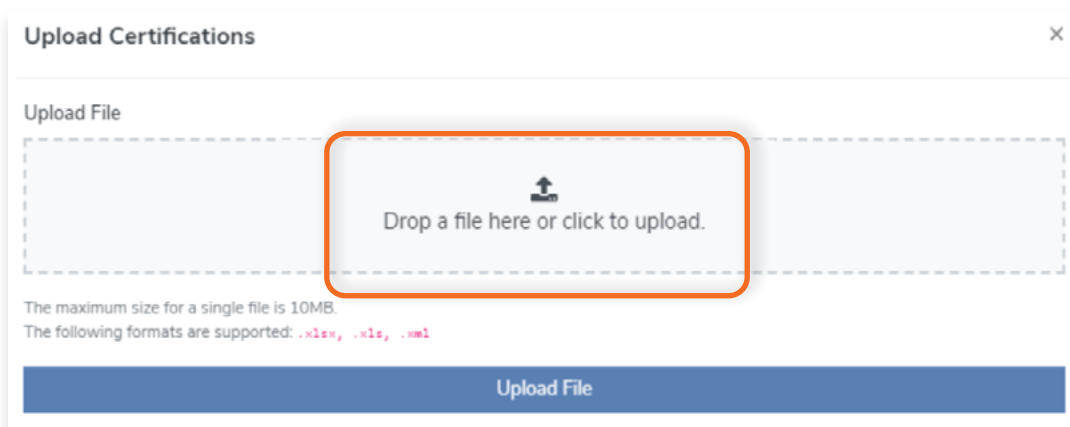
Step 9

Once file is selected, click **Upload File.**
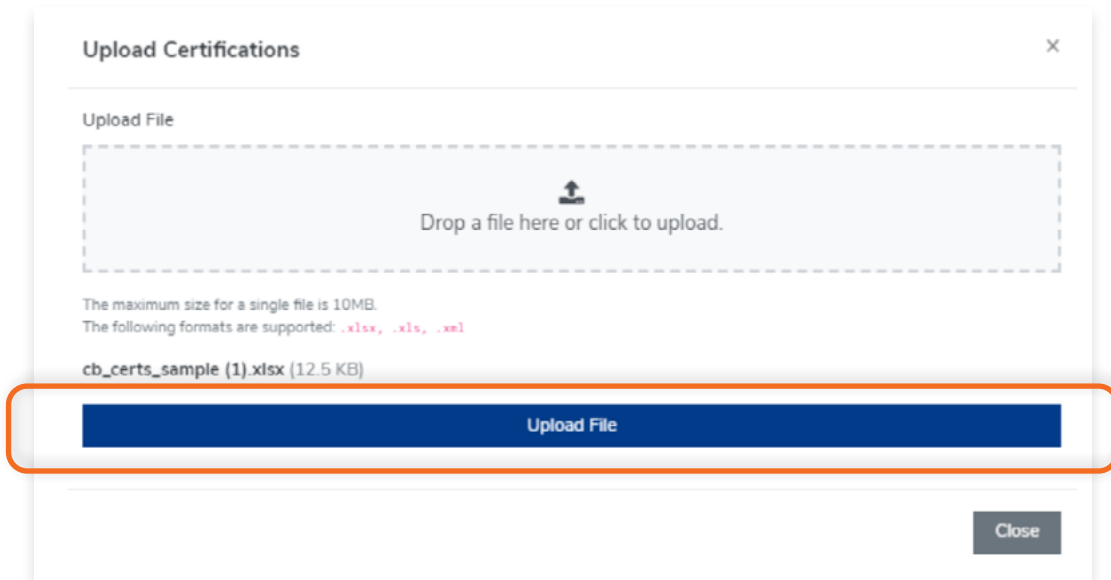
A pop up will appear to indicate the file was successfully uploaded or not. It is important that you wait for the pop up message. Do not refresh or leave the page until the pop up confirmation message appears.
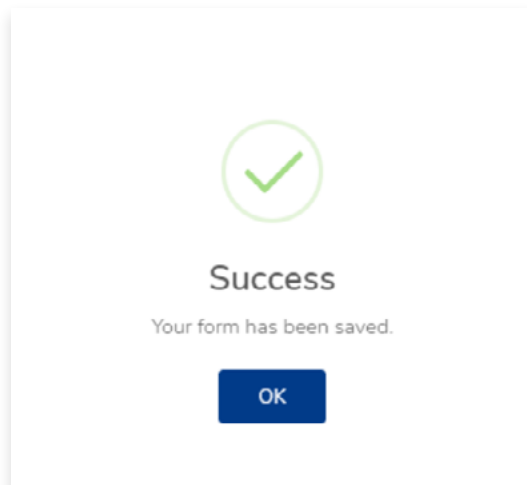
Step 10

Go back to **Certified Entities**. You can now see that the Country/Economy has been updated successfully.

6.7 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 CB nominated server very 24 hours. Any changes to the file will automatically be reflected in IAF CertSearch. CBs

Step 1

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

Step 2

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

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

How to upload an Excel File using FTP: https://youtu.be/qIz-JzmVtNI

How to upload a XML File using FTP: https://youtu.be/EnC1zW45t6U

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

Step 1

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

Step 2

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

Step 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.

Step 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:

cb_certs.xls (Excel format)

cb_certs.xlsx (Excel format)

cb_certs.xml (XML format)

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

PLEASE NOTE:

In the FTP process the file size can't be greater than 40MB. If the file size is greater than 40BM in xml, additional files can be created by numbering. i.e cb_certs_1.xlm, cb_certs_2.xlm etc cb_certs_1 ~ 10.xlm . 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.

Video Guide

▶ How to use Data Management

Upload Certification Data

▶ How to prepare Excel data
▶ How to prepare XML data
▶ How to upload Excel data using FTP
▶ How to upload XML data using FTP

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

Data Instruction

How to prepare Certification Data?

Excel Data Instruction   XML Data Instruction

Download Data Templates

Upload Certification

⬇ Excel Template   ⬇ XML Template

View Samples: Excel Sample File. XML Sample File

File Names

Certification File Name   cb_certs.xls , cb_certs.xlsx , cb_certs.xml

Step 5

Scroll to General Settings and click Edit.

File Names

Certification File Name   cb_certs.xls , cb_certs.xlsx , cb_certs.xml

General Settings   Edit
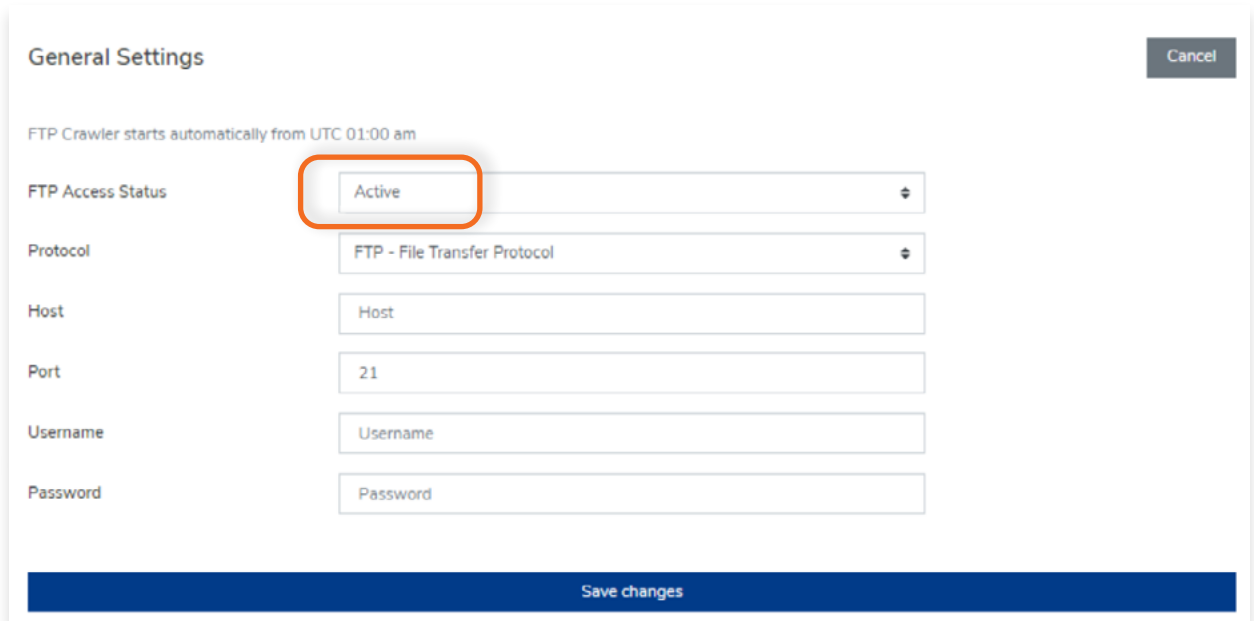
FTP Crawler starts automatically from UTC 01:00 am

FTP Access Status	Inactive ♦
Protocol	FTP - File Transfer Protocol ♦
Host	Host
Port	21
Username	Username
Password	Password
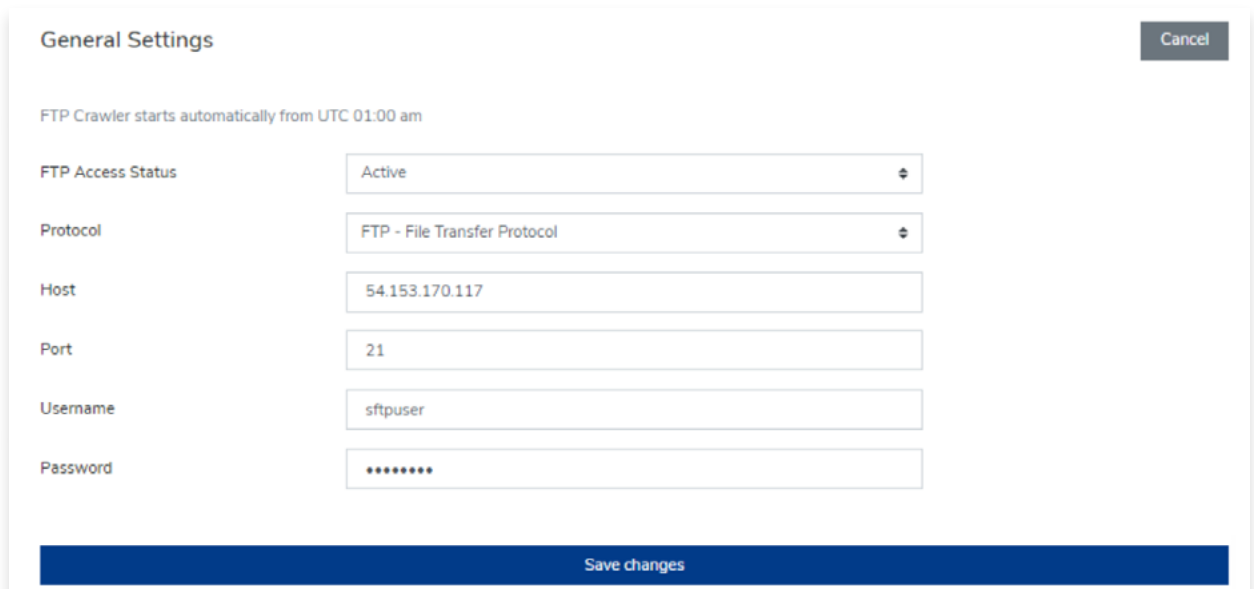
Test FTP Connection

Step 6

Change the FTP Access Status to Active.

Step 7
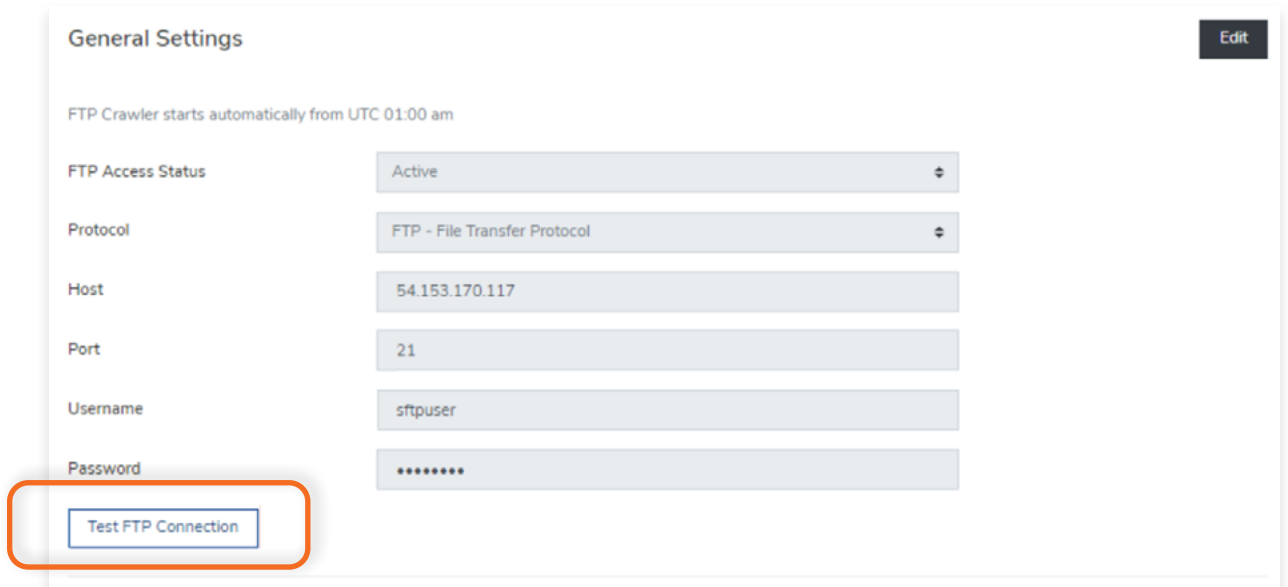
Select the Protocol and enter your Host, Port detail, Username and Password. Click **Save changes.**

Step 8

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

Step 9

A pop up will appear indicating that the connection was successful.
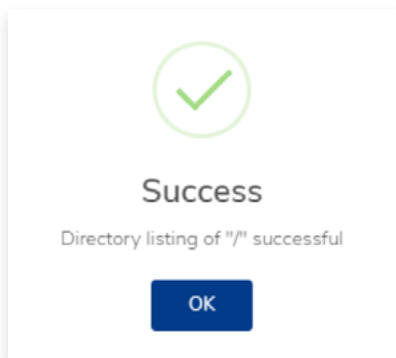
Step 10

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.

6.8   How to Use the API Access Section
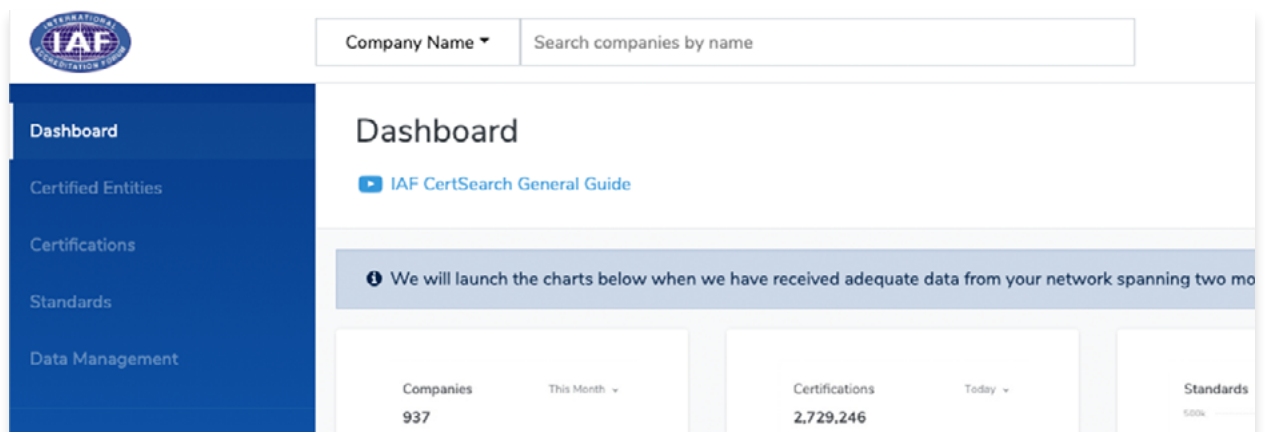
View the step by step guide below or watch the video guide here:
https://youtu.be/_TlEmirQOuI

The API allows the ability to feed data into the IAF CertSearch in real time.

Step 1

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

Step 2

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

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

How to upload an Excel File using FTP: https://youtu.be/qIz-JzmVtNl

How to upload a XML File using FTP: https://youtu.be/EnC1zW45t6U

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

Step 1

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

Step 2

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

Step 3

Click **View API Access Instructions**
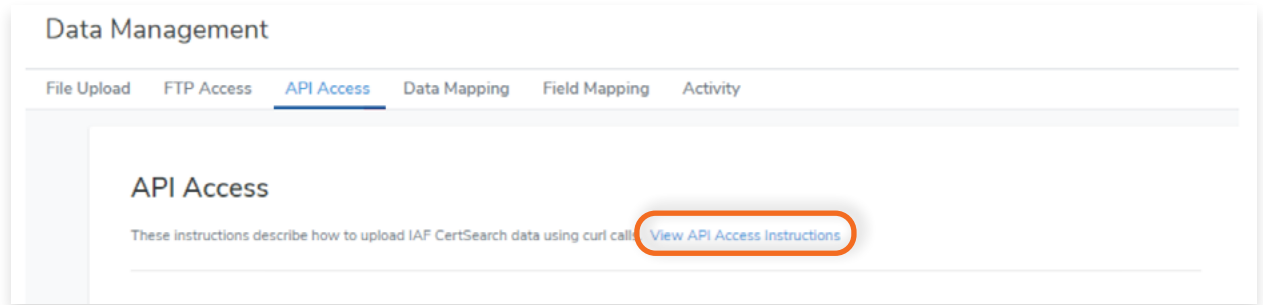
Step 4

Read the API Access Instructions documentation.
The documentation provides clear instructions on how to establish the API.
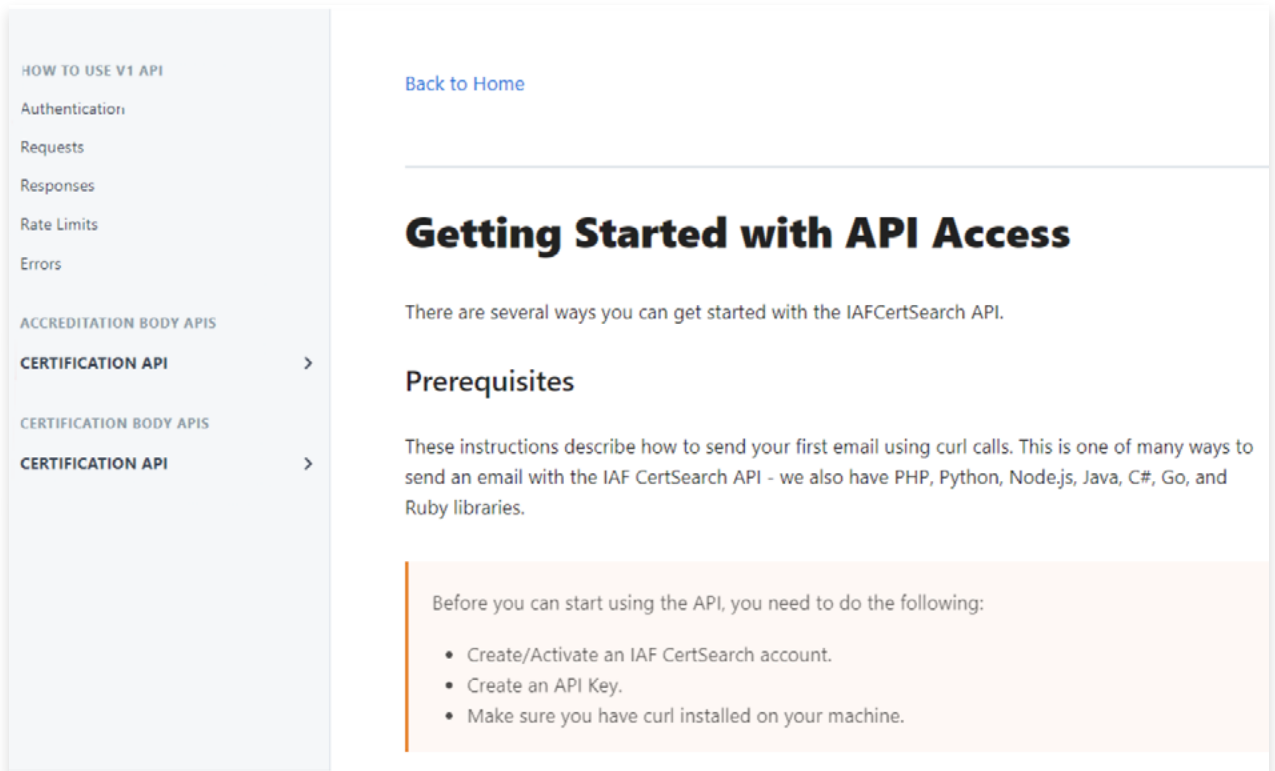
Step 1

From the Dashboard, click **Data Management** in the left hand navigation.
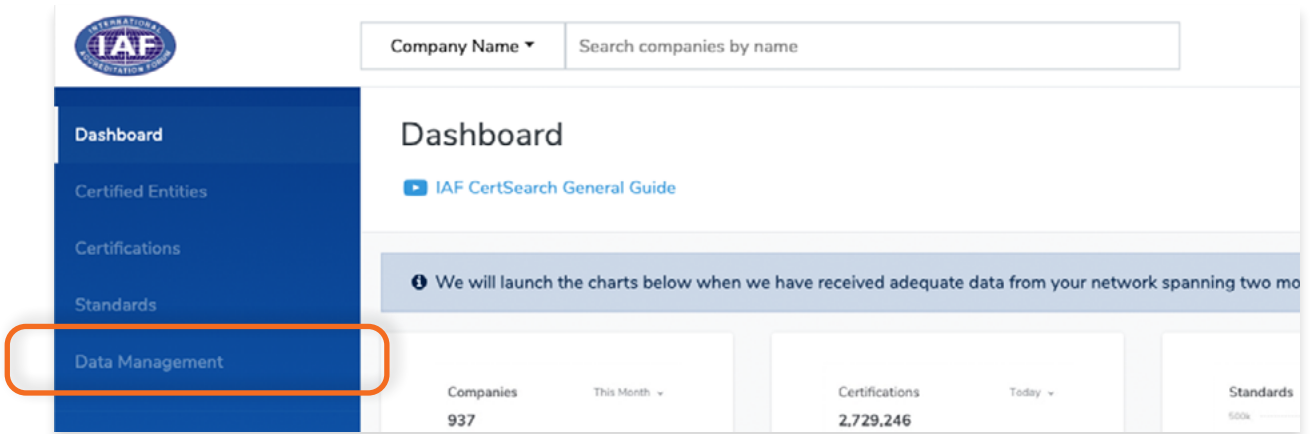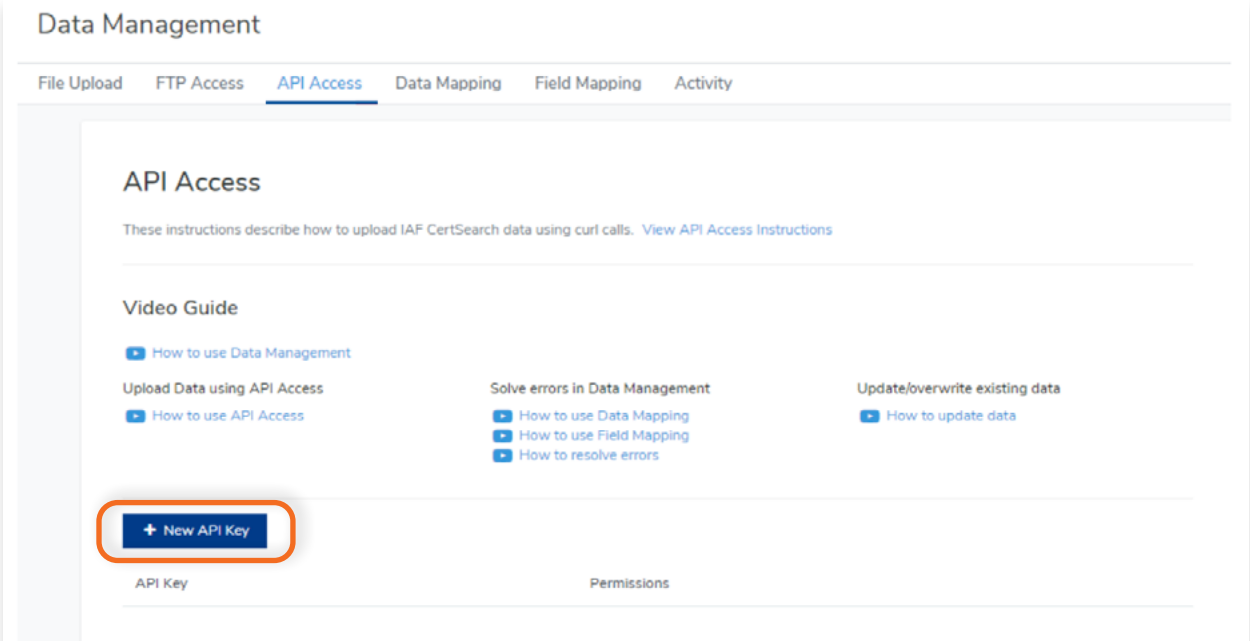
Step 2

Click **API Access** in the menu bar.
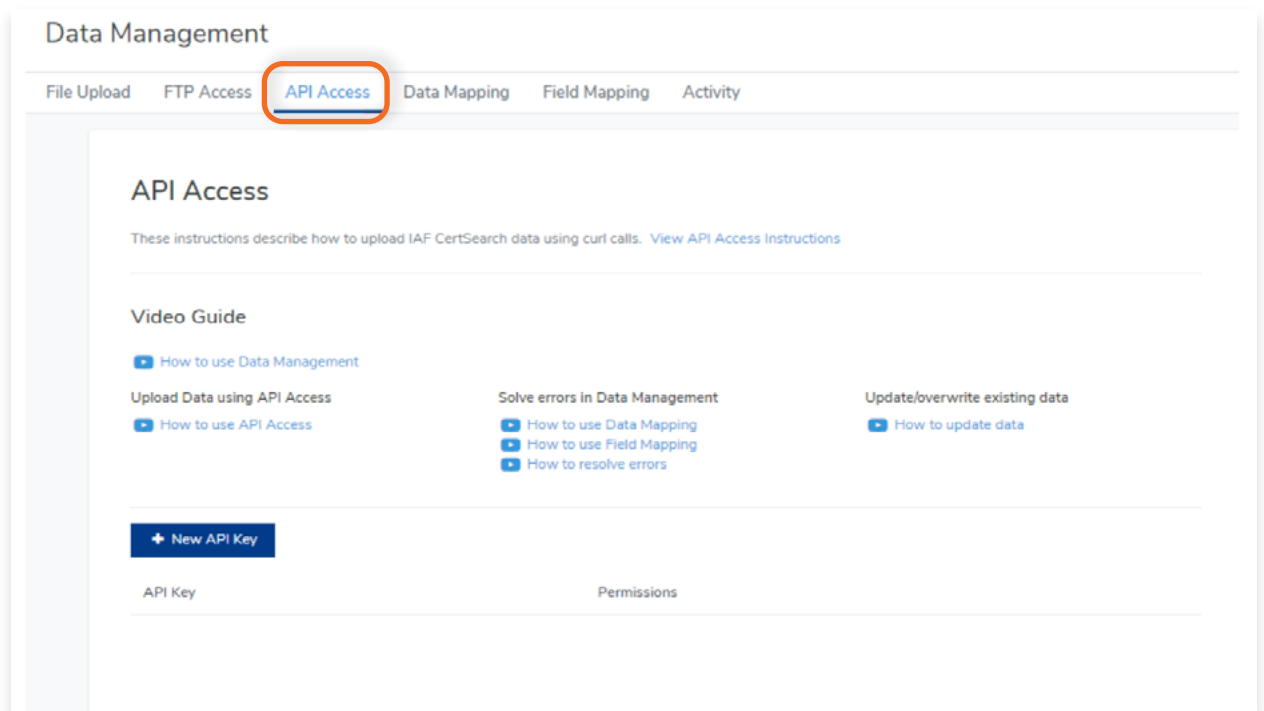
Step 3
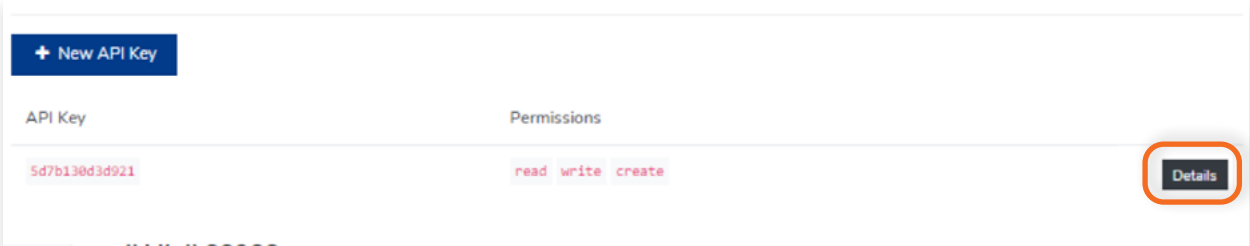
Under API Access, click **+ New API Key**

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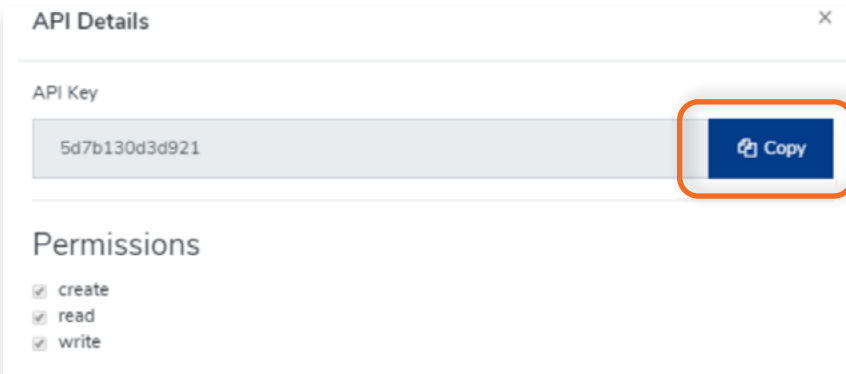
The API key will be generated. Click **Details.**

Step 5

Copy the API Key.

6.9 How to Use Data Mapping

View the step by step guide below or watch the video guide here:
https://youtu.be/v-bcR_GHWUQ

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

Step 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"

Certified Entity Unique ID	Certified Entity Street	Certified Entity City	Certified Entity State	Certified Entity Zipcode/Postcode	Certified Entity Country/Economy
UNIQUEID-COMPANY01	Suite 100, #3601 E Algonquin Road	Rolling Meadows	Illinois	60008	USA
UNIQUEID-COMPANY02	505N, Sam Houston Pkwy East, Suite # 682	Houston	Texas	77060	USA

Step 2

Go to Data Management to upload the file.

Download Data Templates

Upload Certification

⬇ 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 Certifications

Step 3

A message will appear saying "Resolve Errors".

Ⓧ

Resolve Errors

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

Close

Step 4

Go to File Upload Activities under the **Upload Certifications** button. You will see 2 errors found in the

Step 5

Click View

Step 6

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

Step 7

In the suggestion column, click **Data Mapping**

Step 8

In Data Mapping, you will see that there is no match for "usa".

Step 9

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

Step 10

Click **Edit**

Step 11

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

Step 11

Click **Save changes**

Step 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.

Step 14

Go back to File Upload Activities.

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

Go to Certified Entities. the values for "USA" will appear as "United States" indicating that the data mapping for this sample is also successful.

6.10 How to Use Field Mapping

View the step by step guide below or watch the video guide here:
https://youtu.be/N4adGJd8TxE

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.

Step 1

Open the template.
The field values in IAF CertSearch are "Accreditation Body Name" and "Accreditation Body Acronym".

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

Certified Entity Zipcode/Postcode	Certified Entity Country/Economy	AB Name	AB Acronym
60008	USA	Test Accreditation Body	TAB
77060	USA	Test Accreditation Body	TAB

Step 2

Go to Data Management to upload the file.

Download Data Templates

Upload Certification

⬇ 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 Certifications

Step 3

A message will appear saying "Resolve Errors".

Step 4

Go to **File Upload Activities** under the Upload Certifications button. You will see 2 errors found in the

Step 5

Click **View**

Step 6

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

Step 7

In the suggestion column, click **Field Mapping**

Step 8

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

Step 9

Click **Actions** on one of the errors and select **View Details**
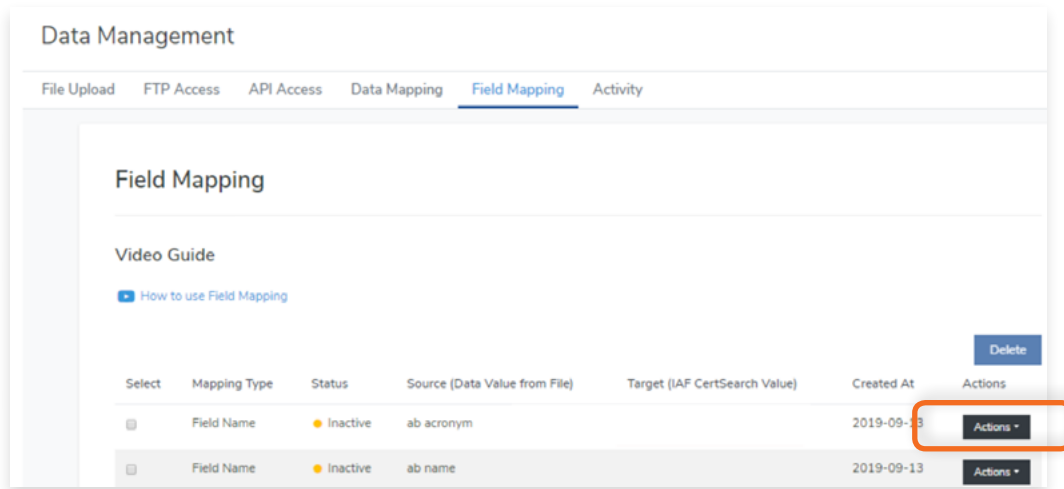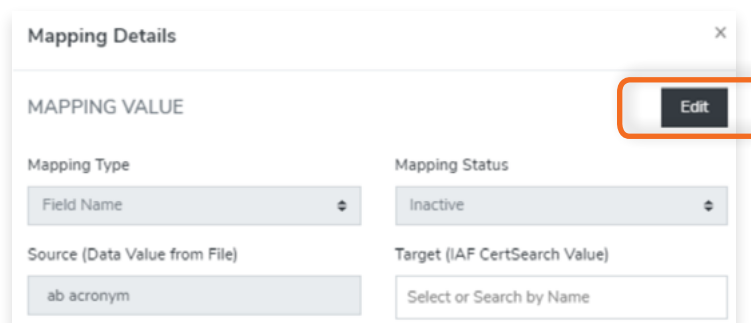
Step 10

Click **Edit**

Step 11

Change the Mapping Status to Active and Make sure that the correct target is selected.
In our sample, it should be "Accreditation Body Acronym".
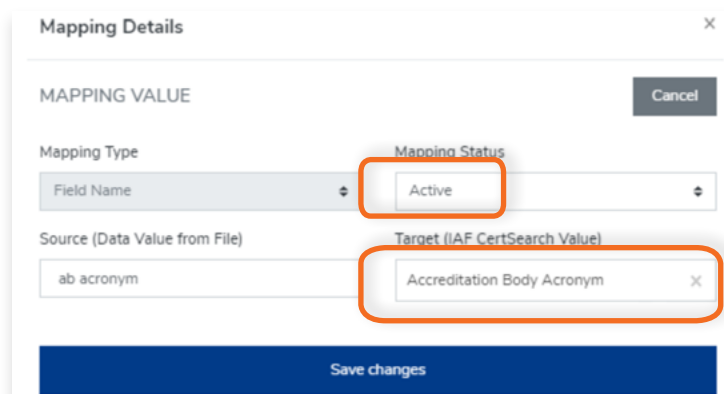
Step 12

Click **Save changes**

Step 13

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

Step 14

Reupload the file again.

Step 15

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

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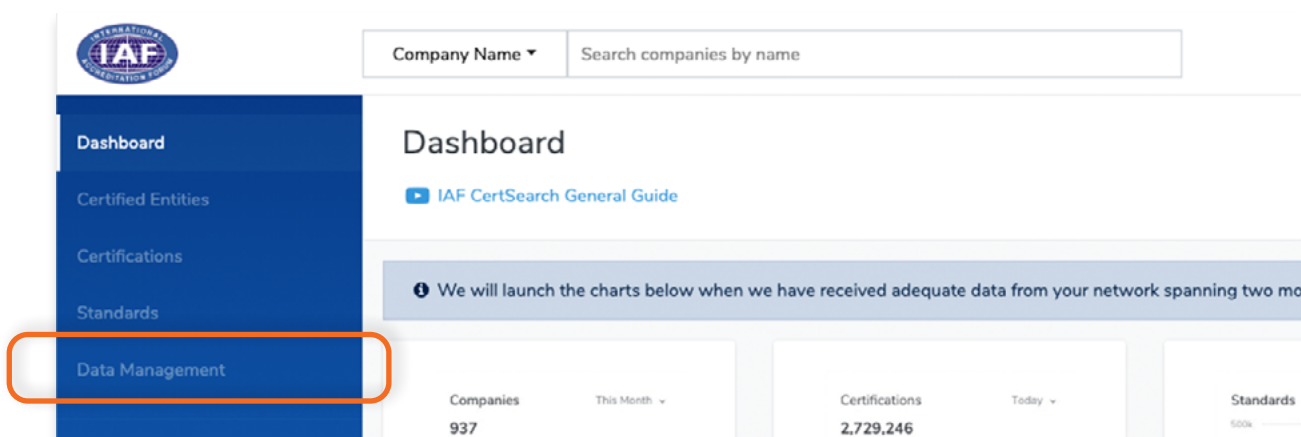
Do not be alarmed if you receive an error. It does not mean that IAF CertSearch is not working, it just mean there are data errors which need to be resolved so the data can be accepted. IAF Certsearch will pin point where the errors are so you can easily resolve.

View the step by step guide below or watch the video guide here:
https://youtu.be/x1u6puu4zrI

Step 1

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

Step 2

Upload a file. Click **Upload Certifications.**

Step 3

If you upload a file with an error, it will be detected.
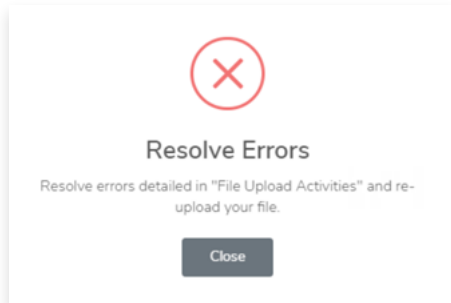
Step 4

In Data Management, click **Activity** in the menu bar.
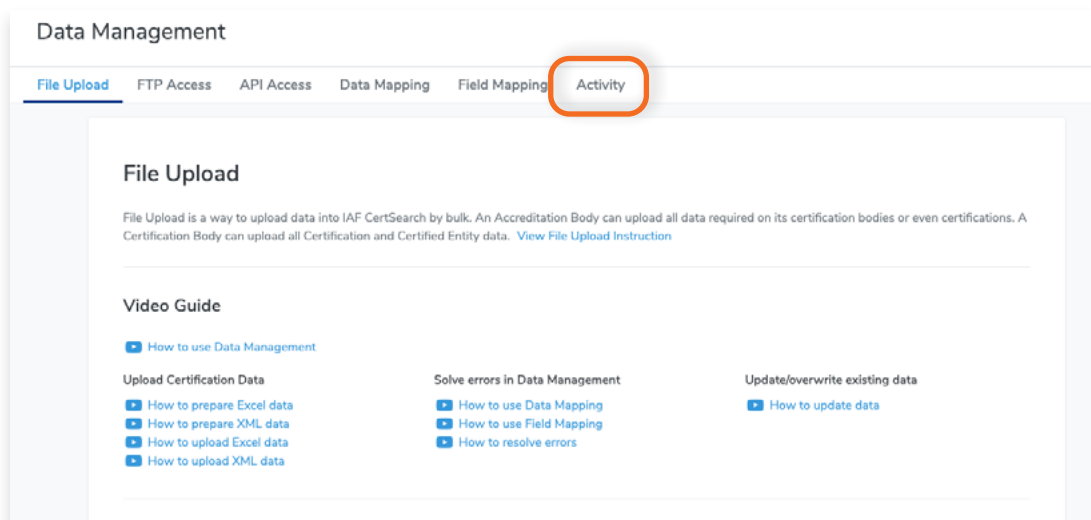
Step 5

Find the file upload record that includes and error and click **View.**
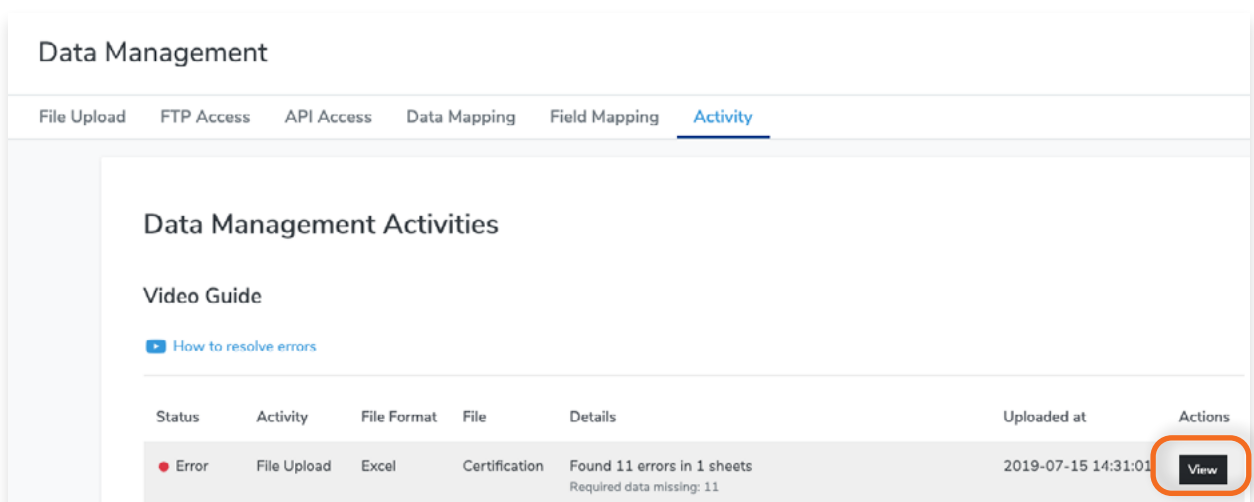
Step 6

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 Certificate Number of a Certification is missing.

Step 7

Resolve the issue in your file.

Resolve the issue in your file.

Step 7

Re-upload the file.

Step 9

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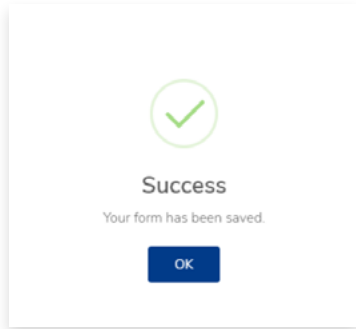
7. Enquiries

7.1 How to View Your Enquiries

On the CB live profile, there is a form where organisations/users can make enquiries. Enquiries may be certification, sales, 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.

Step 1

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

Step 2

Find the specific Enquiry you want to view.

You can filter your enquiries by Status, Category and Enquiry Type.
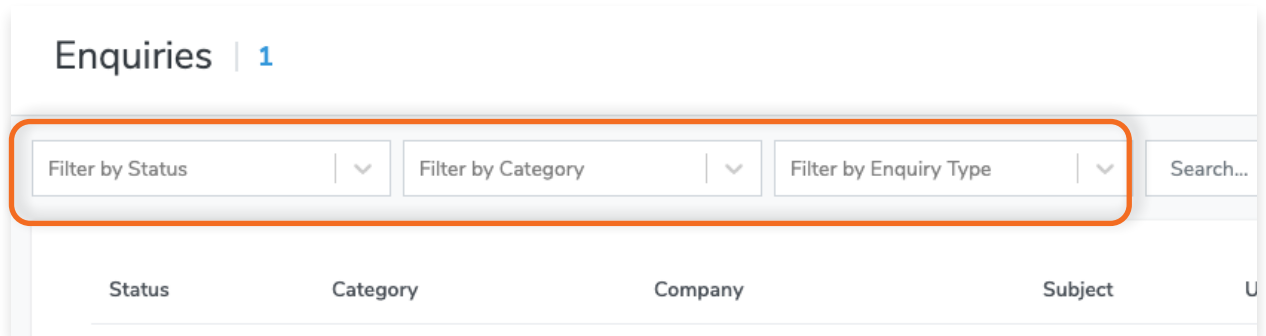
A Search box is also provided to help you search a specific enquiry.
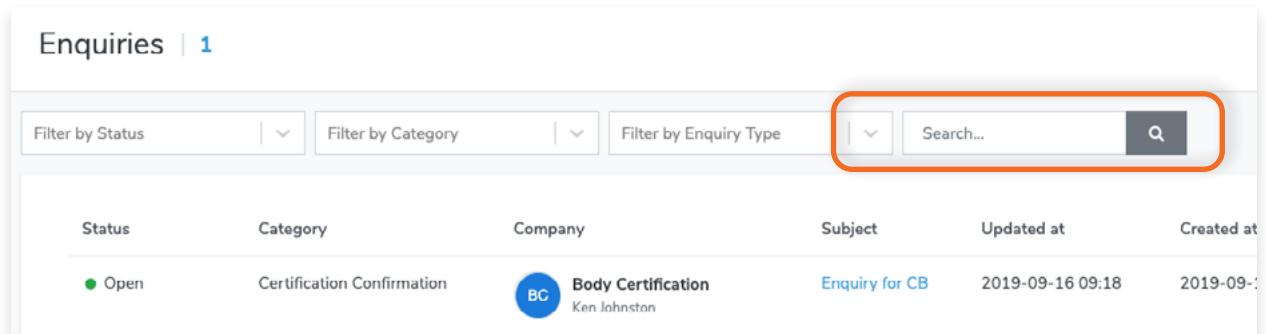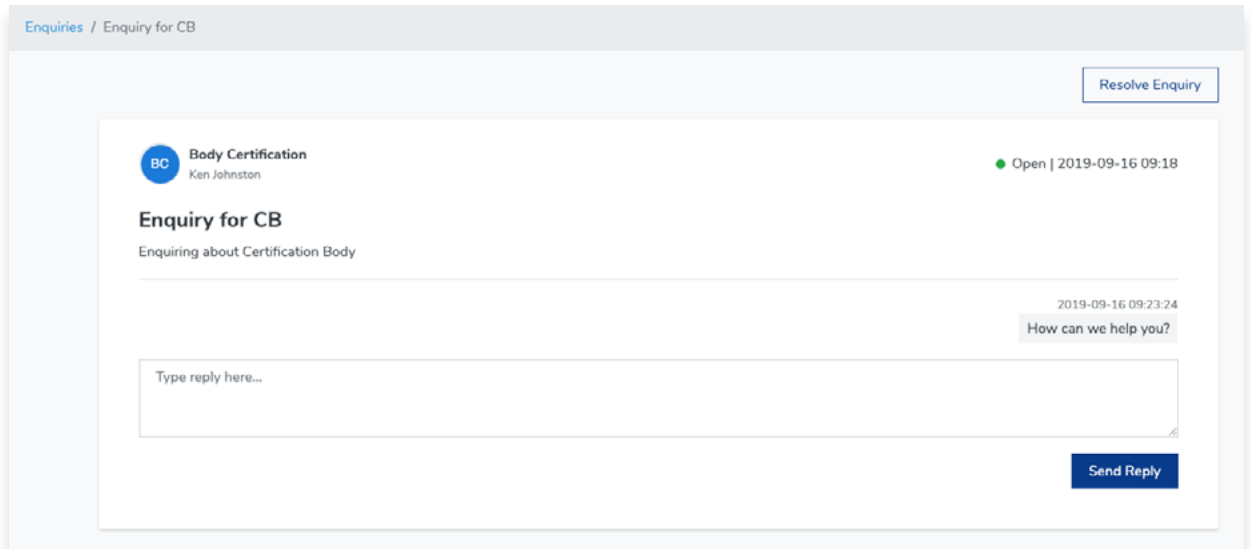
Step 3

Click View
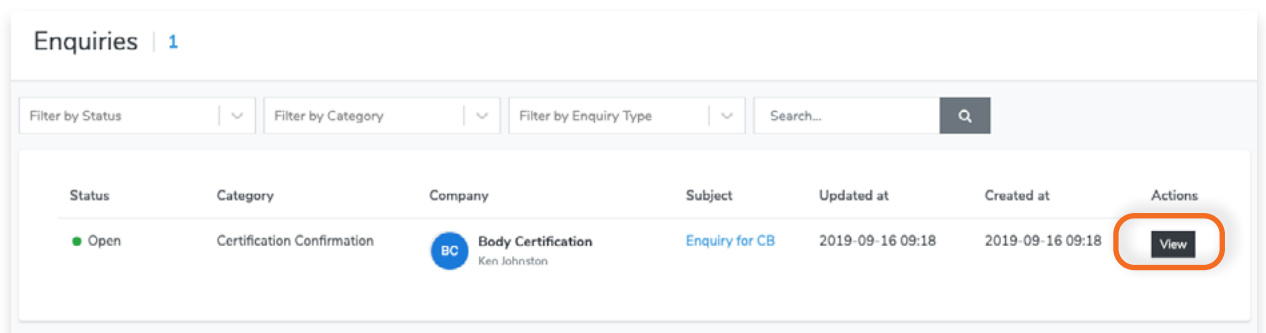
Step 4

Now you can view the Enquiry.

7.2   How to Reply to Enquiries

Step 1

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

Step 2

Find the specific Enquiry you want to view.

Step 4

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

Step 1

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

Step 2

Find the specific Enquiry you want to view.

Step 4

Click **Resolve Enquiry.** This will change the status of your enquiry from Open to Resolved.

7.4 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.
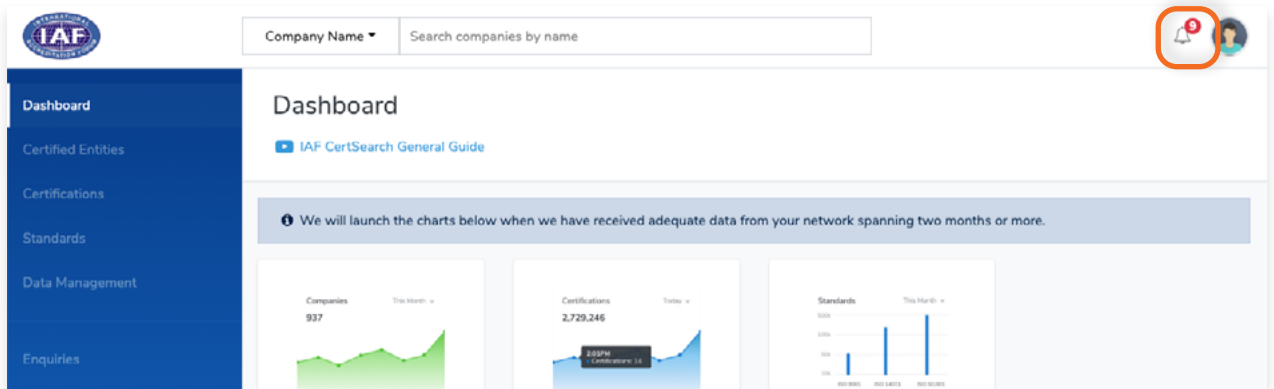
This icon will show you the number pending notifications.

Step 1

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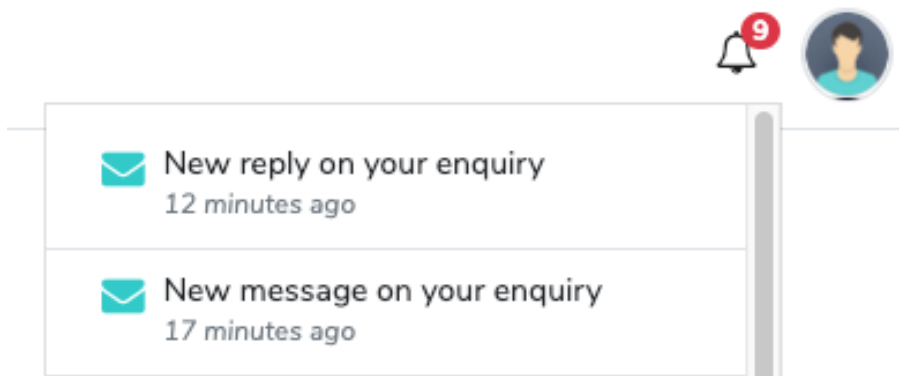
Step 2

Click on a specific notification to resolve or respond.

8. Accounts

▌ 8.1   How to View Accounts

You can create multiple accounts under the registered Certification Body entity. The Certification 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 certification data within the Certification Body account (Registered company). Note these Accounts are different to Multi National Certification Body (MNCB) group accounts. Multi National Certification Bodies are a group of Certification Body (individual legal entities/subsidiaries which hold independent accreditations) under the one group. Contact info@iafcertsearch.org if you are MNCB and require a MNCB group established in IAF CertSearch.

Step 1

From the Dashboard, click **Accounts** in the left hand navigation.
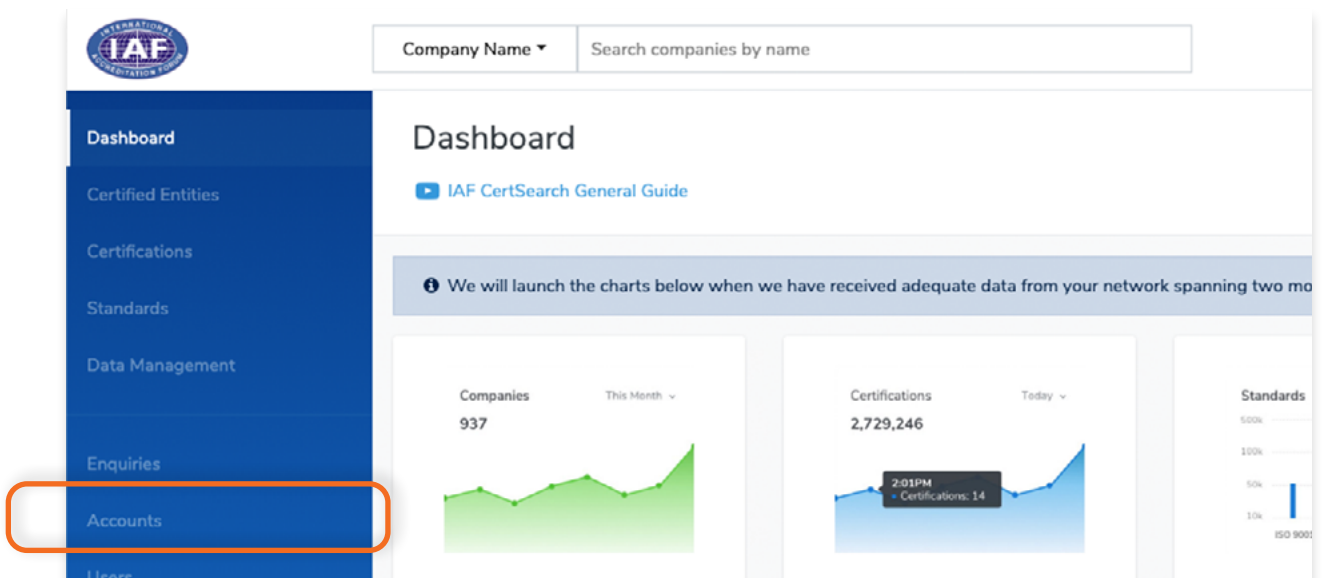
Here you can view the list of your current accounts.

Step 2

Find the account you want to view

Step 3

Click **View.**

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

View the step by step guide below or watch the video guide here:
https://youtu.be/wNDp6uvaJQ8

Step 1

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

 Here you can view the list of your current accounts.

Step 2

Find the account you want to edit.

Step 3

Click **View.**

Step 4

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

Step 5

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

Step 6

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

Step 7
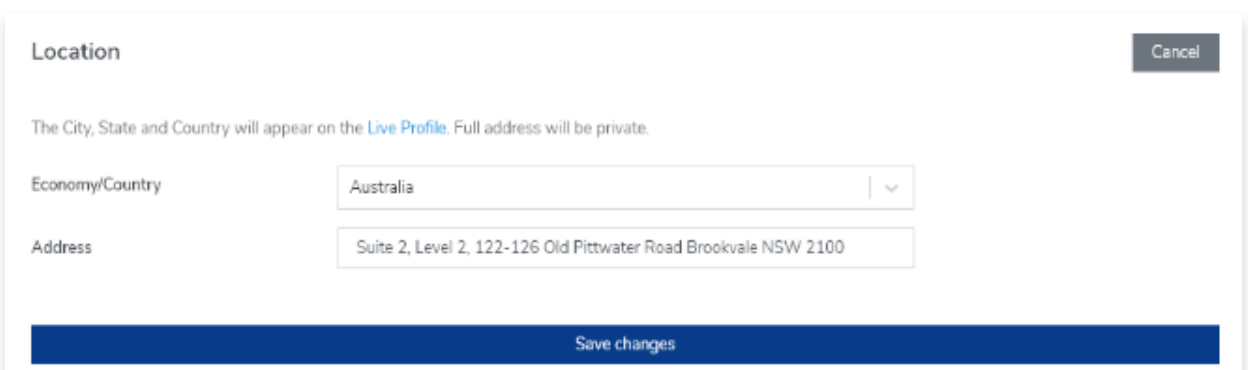
Here you can edit the Economy/Country and the Address of the account.
Note: the City, State and Country will appear on the Live Profile.
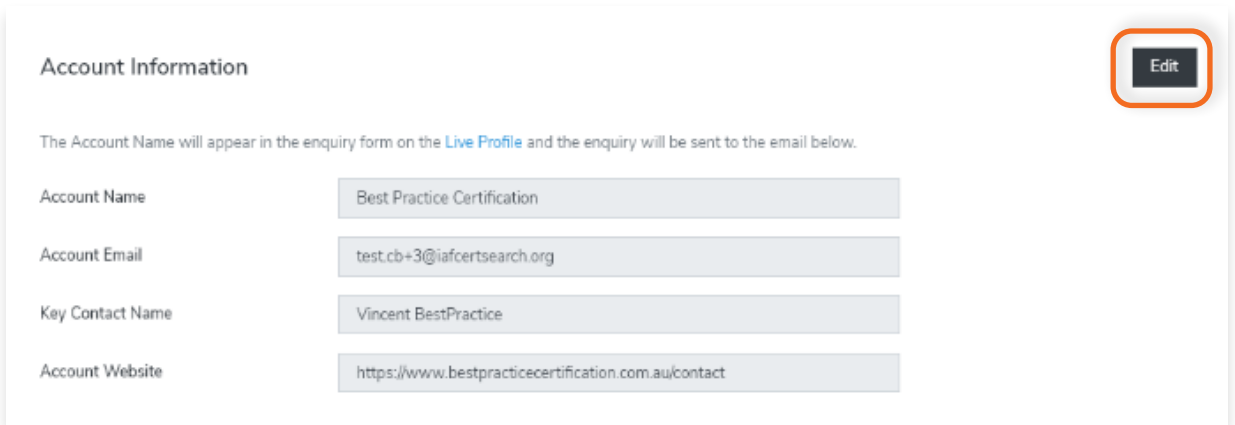
Step 8

Click **Save changes.**

Step 9

Go to the Account Information section and click **Edit.**
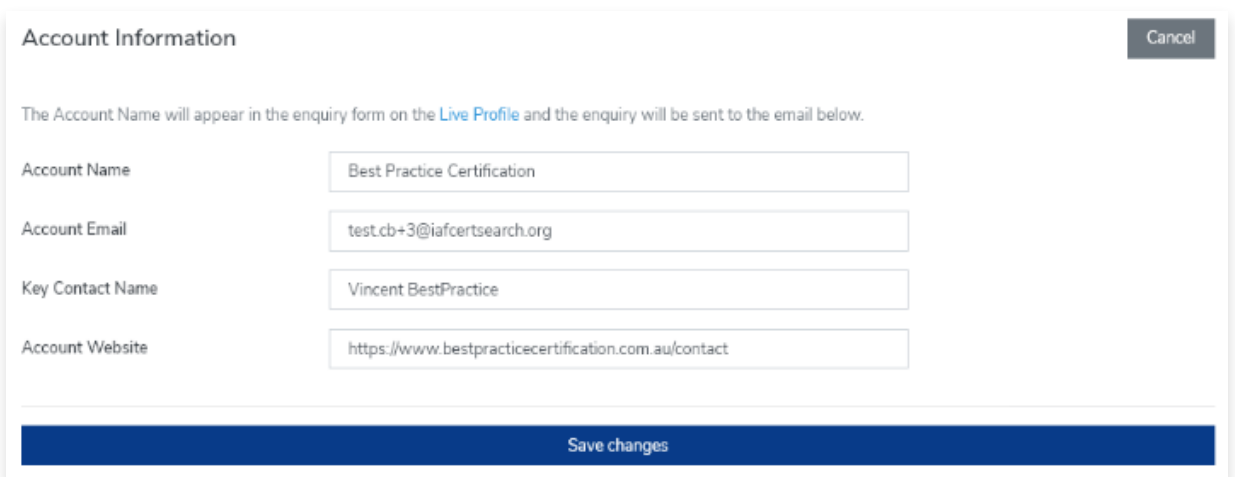
Step 10

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.

Step 10

Click **Save changes.**

8.3   How to Add an Account

View the step by step guide below or watch the video guide here:
https://youtu.be/NhiP4Ijo5X0

Step 1

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

Step 2

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

Step 3

Enter Location and Account Information.

Step 3

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.

9. Users

9.1 How to View a User

Here you can manage the users who access your account. In the Users area, you can see the users that belong to this Account. In the User area you can view, edit, or invite new users.

Step 1

From the Dashboard, click **Users** in the left hand navigation.
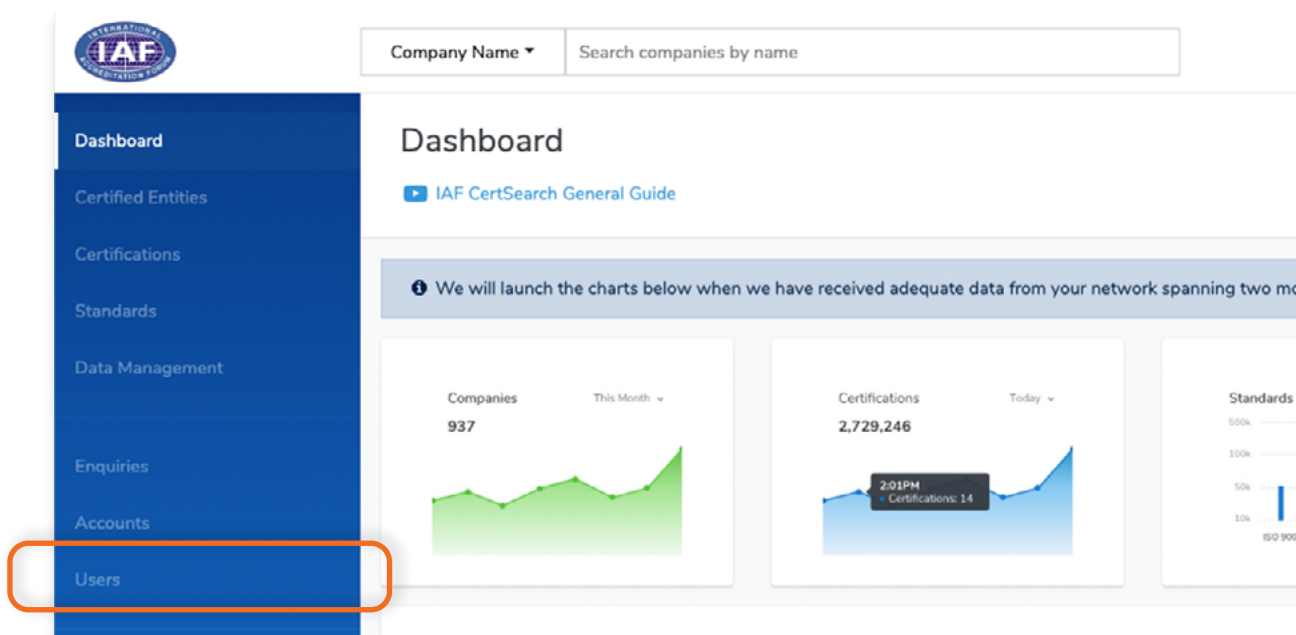
You can filter your users by Role and Status. You can also use the Search box to search users by their name.
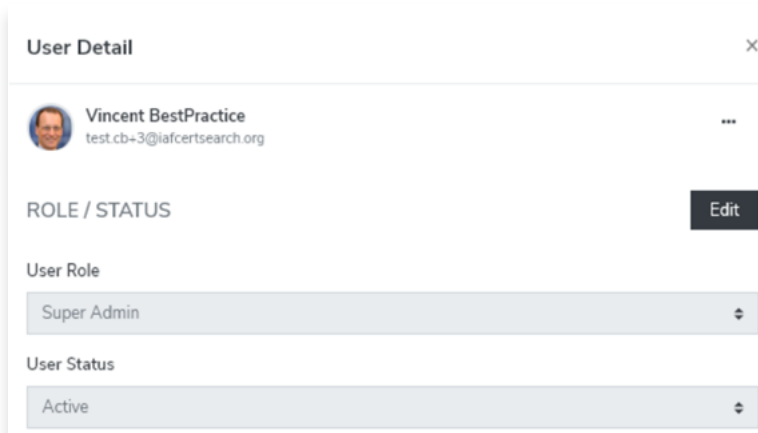
Step 2

Find the User you want to view and click **View.**
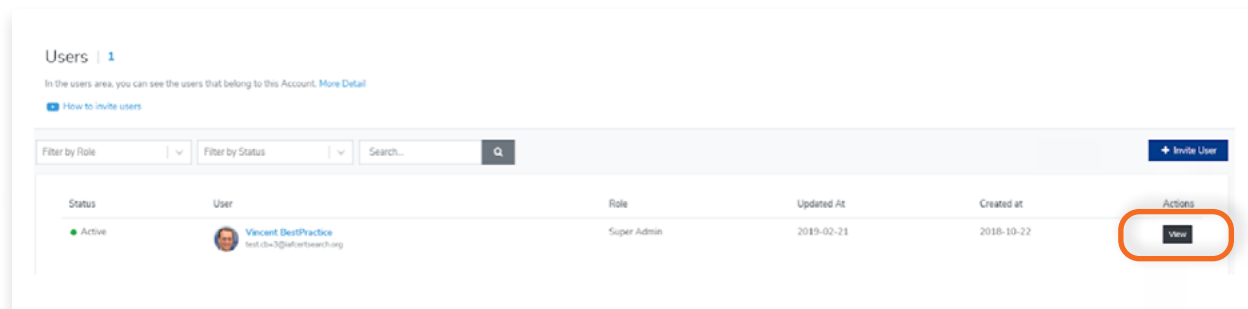
Step 3

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

9.2 How to Edit a User

Step 1

From the Dashboard, click **Users** in the left hand navigation.
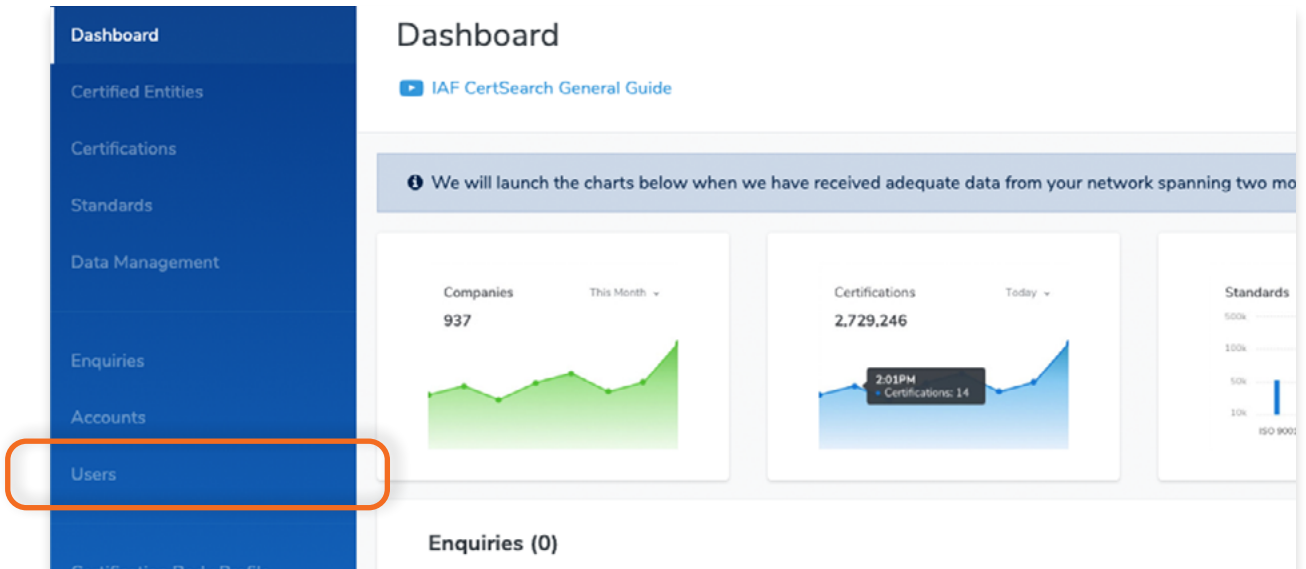
Step 2

Find the User you want to view and click **View.**
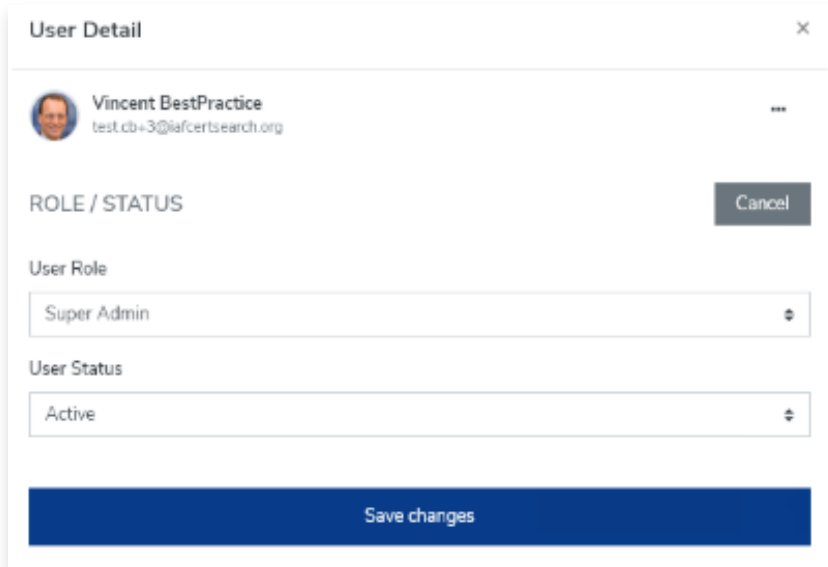
Step 3

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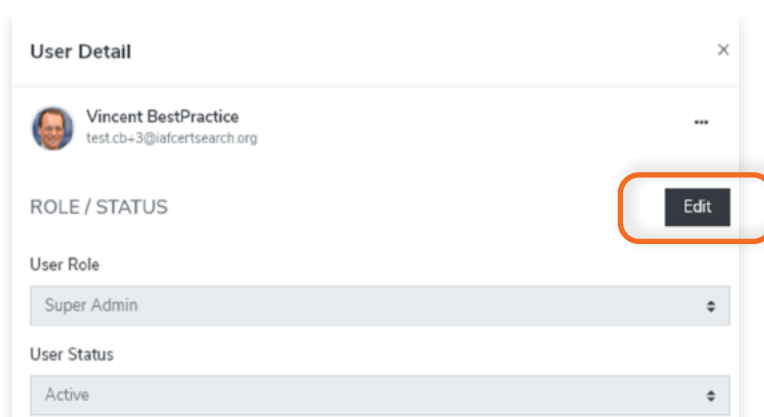
Step 4

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

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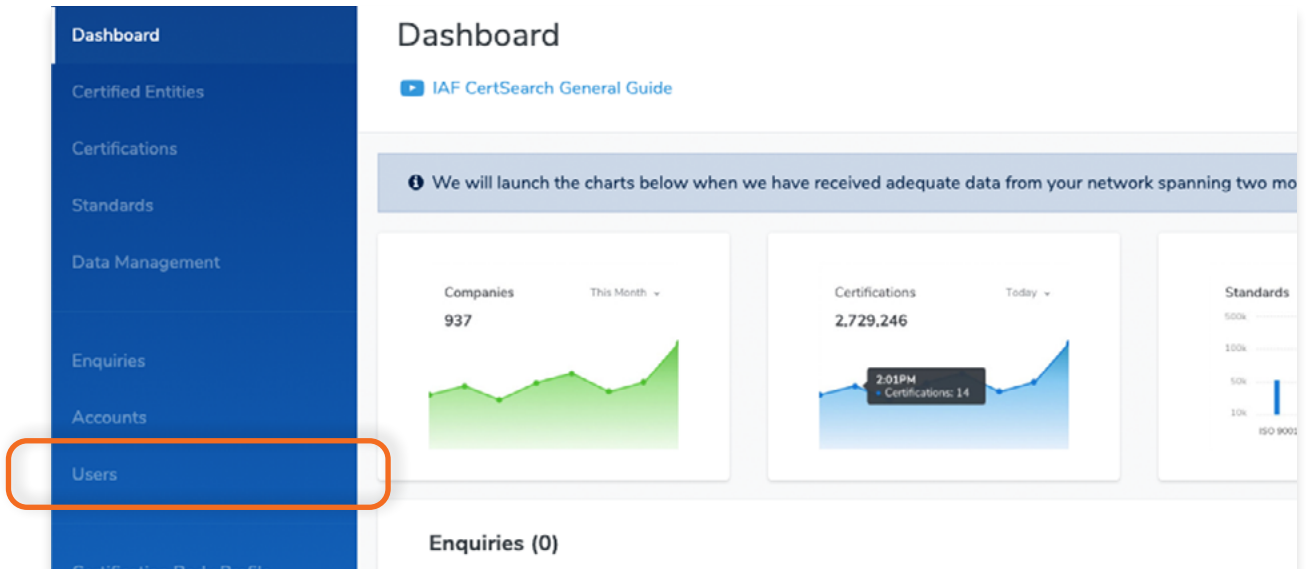
Click **Save changes** once done or click **Cancel** to revert any changes.

9.3   How to Delete a User

Step 1

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

Step 2

Find the User you want to view and click **View.**

Step 3

Click on the options icon "..." and follow the prompts.
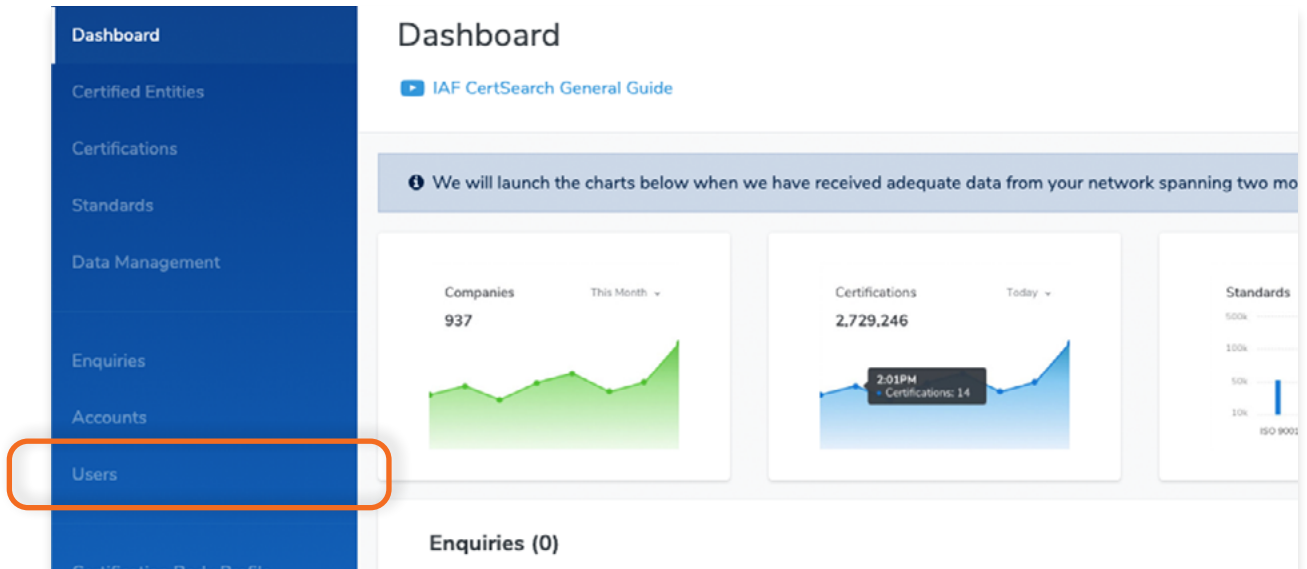
9.4 How to Invite a New User

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=cIvJ4Gqaz6s
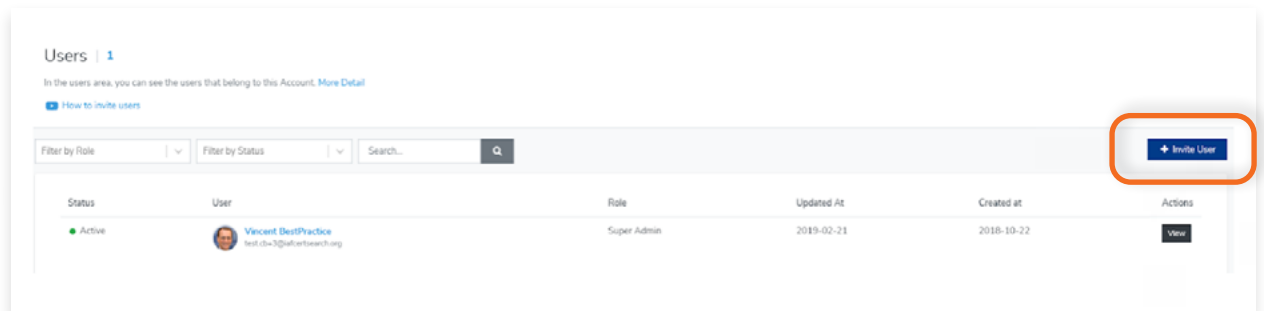
Step 1

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

Step 2

Click **+ Invite User.**
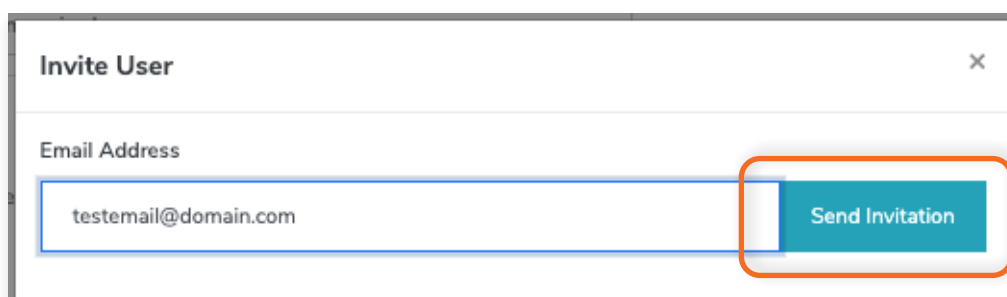
Step 3

Enter an Email Address and click on Send Invitation

10. Certification Body Profile

10.1 How to View Certification Body Information

From your dashboard, click **Certification Body Profile** on the left navigation bar
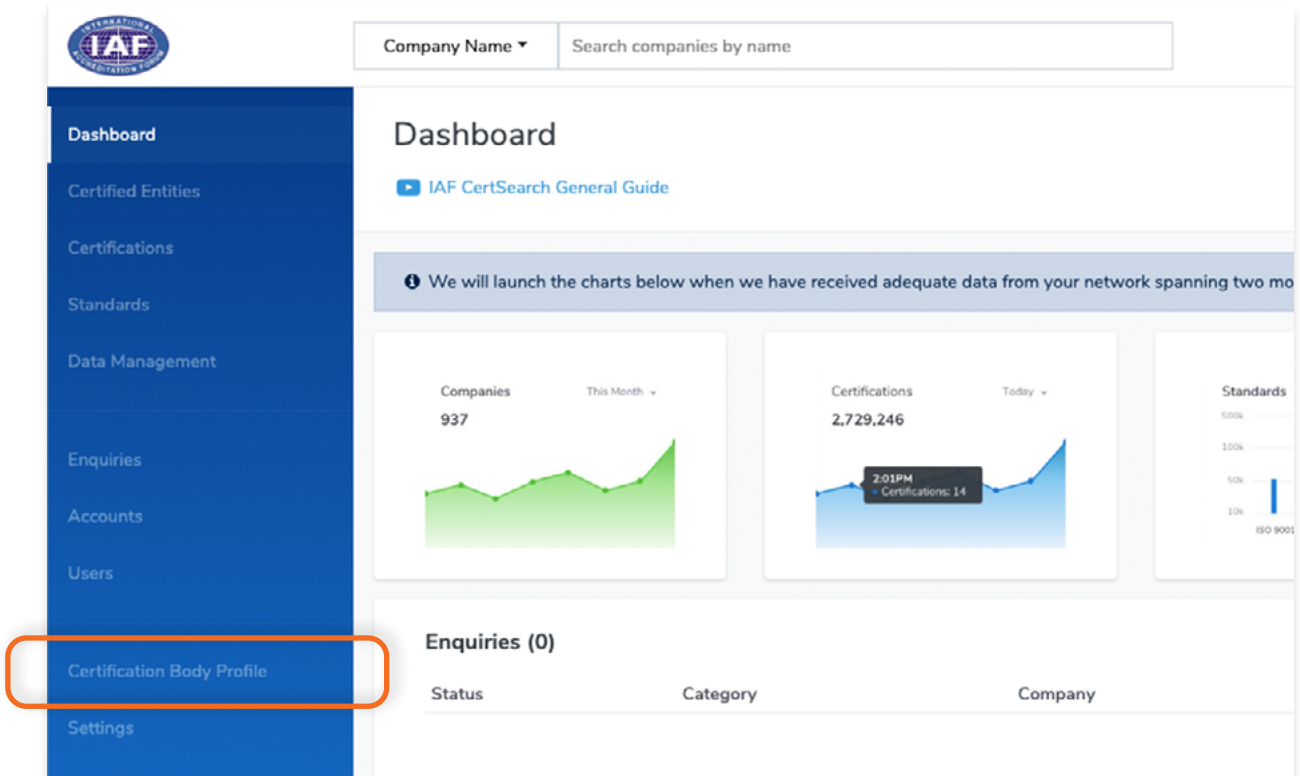
View the following :
Certification Body Information, Office Directory, Accreditation Status, and CB Live Profile.
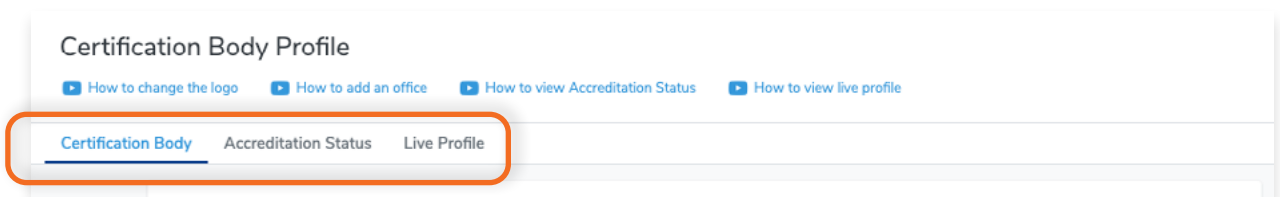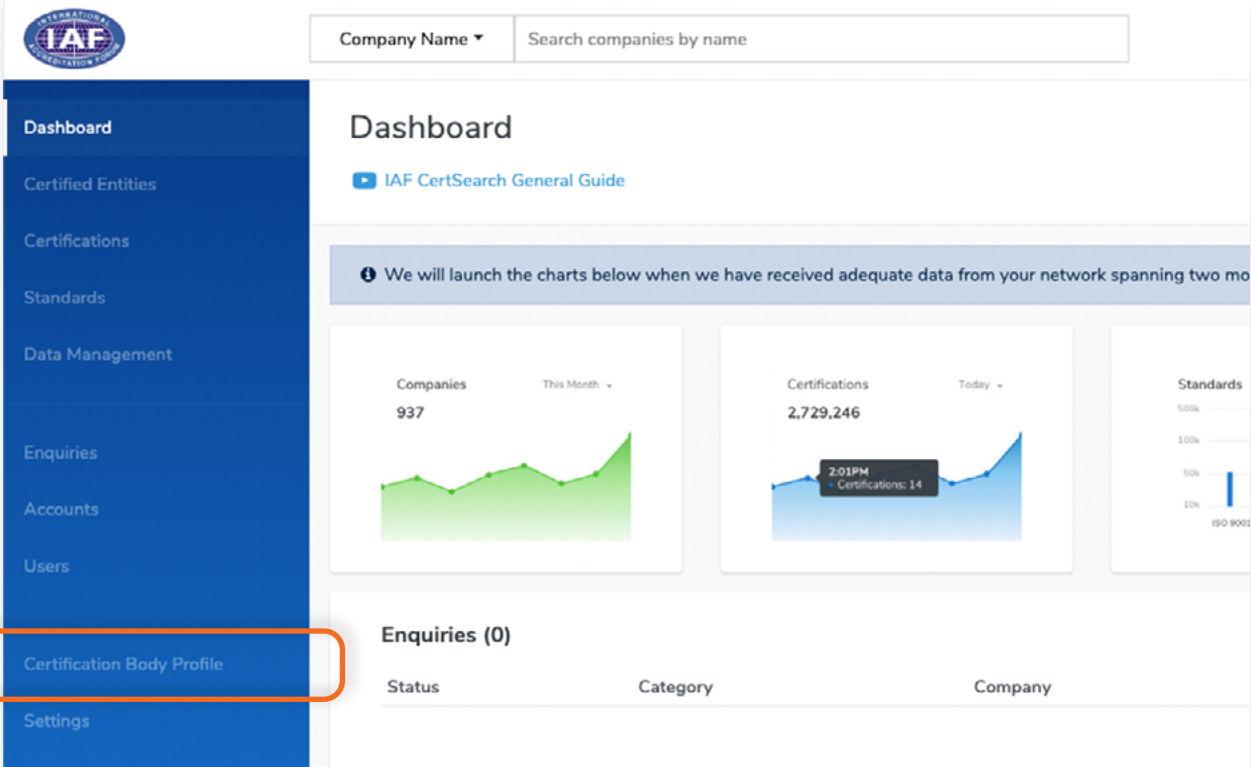
10.2 How to Edit Certification Body Logo

View the step by step guide below or watch the video guide here:
How to change your Logo: https://www.youtube.com/watch?v=SCDzZzlBQT8

Step 1

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

Step 2

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

Step 4

Click **Edit.**
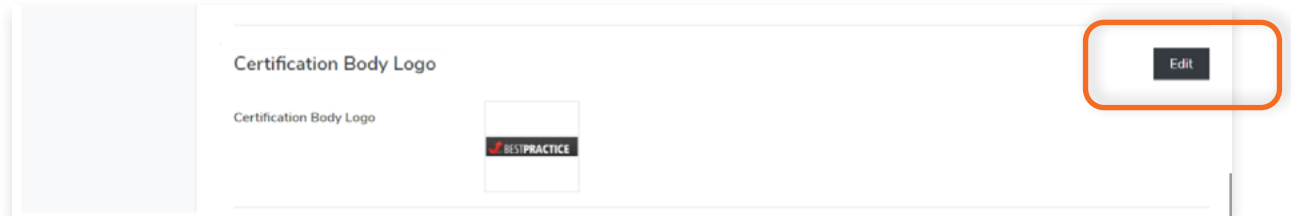
Step 5

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.

Step 6

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

Step 1

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

Step 2

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

Step 3

Click Edit

Choose the Economy/Country of the Certification Body from the drop-down menu.

Certification Body Economy   Cancel

The economy will appear on the Live Profile.

Economy   Australia

Save changes

Step 4
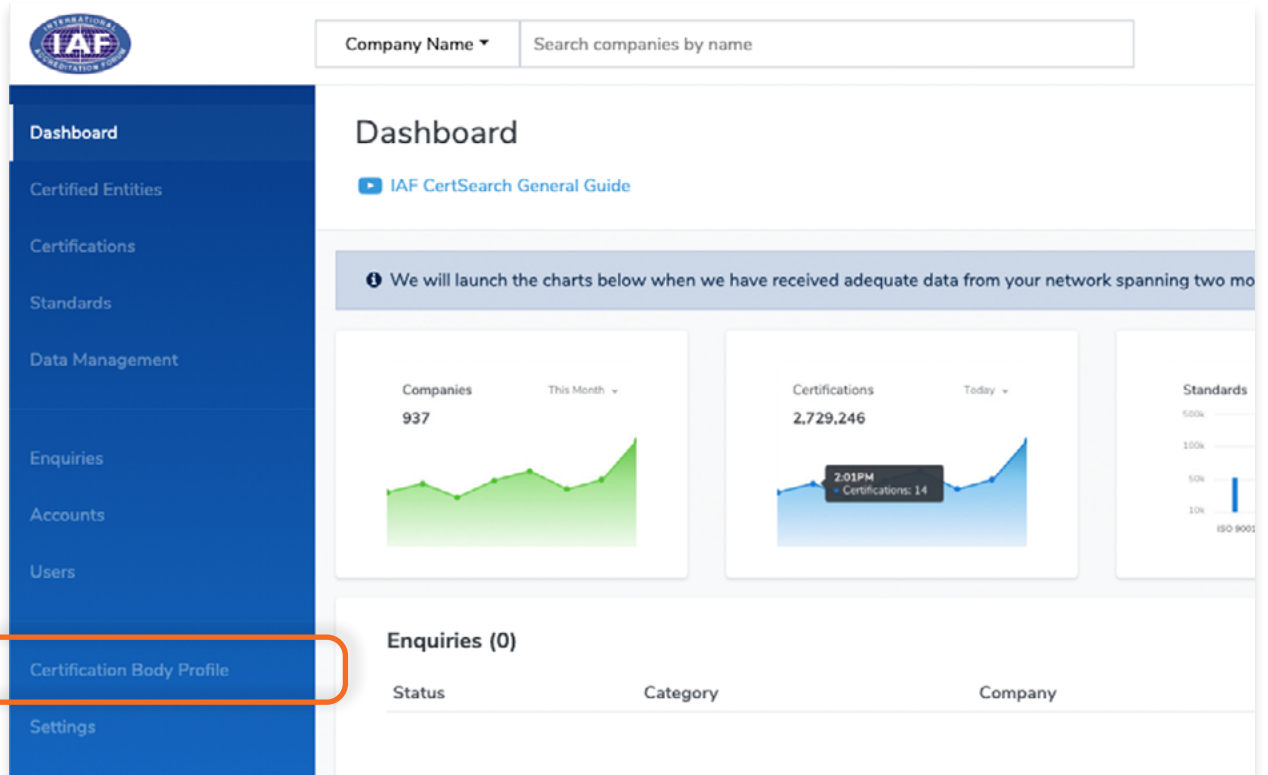
Click **Save Changes** to save.

10.4 How to Edit Certification Body Information

Step 1

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

Step 2

Select **Certification Body** in the top menu bar and scroll to the Certification Body Information and click

Step 3

You can change your website information and Certification Body Description. 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.

Step 4

Select **Certification Body** in the top menu bar and scroll to the Certification Body Information and click
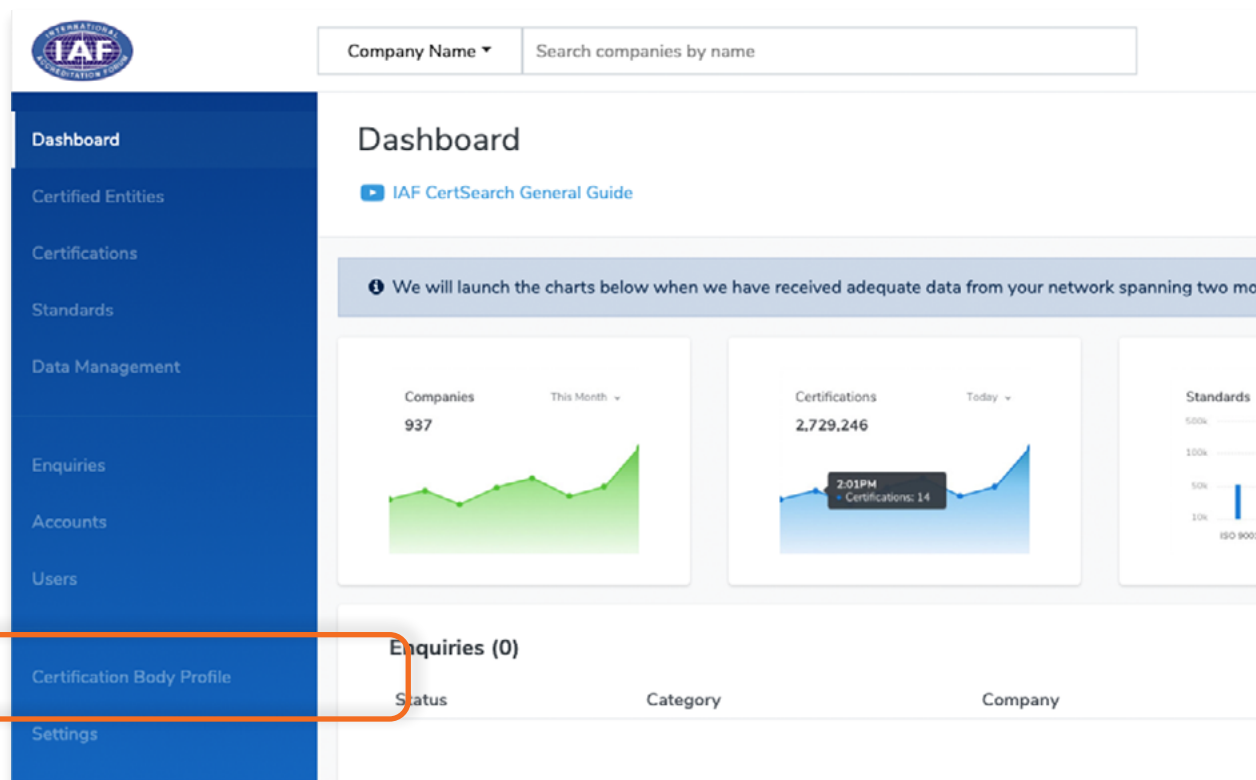
10.5 How to Edit Certification Body Private Information

Step 1

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

Step 2

Select **Certification Body** in the top menu bar and scroll to the Private Information section.

The private information section will have the Certification Body Email Address, Key Contact Name, Certification Body Phone details, and Certification Body Fax details. Enquiries made via the Live Profile will be sent to the certification body email address indicated in this section. Note this is not public information.

Step 3

Select **Certification Body** in the top menu bar and scroll to the Private Information section.

Change Certification Body Email Address, Key Contact Name, Certification Body Phone details, and Certification Body Fax details. Include any country and area codes when editing your Phone and Fax details.

Step 4

Click **Save changes**.

10.6 How to View Accreditation Status
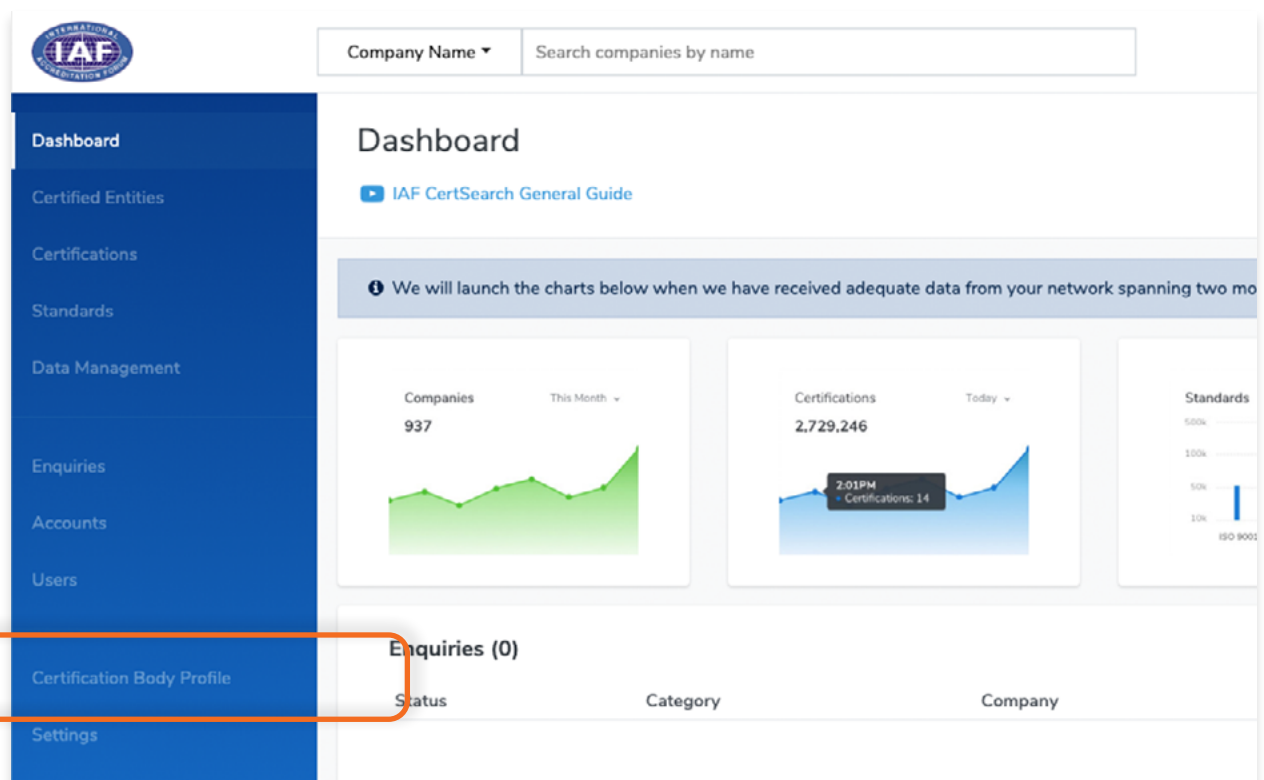
View the step by step guide below or watch the video guide here:
https://youtu.be/pbi457WDXGs

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

Step 1

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

Step 2

Click **Accreditation Status** in the menu bar

The Accreditation status will be either Active, Suspended or Withdrawn. The Accreditation Body manages the Accreditation Status.
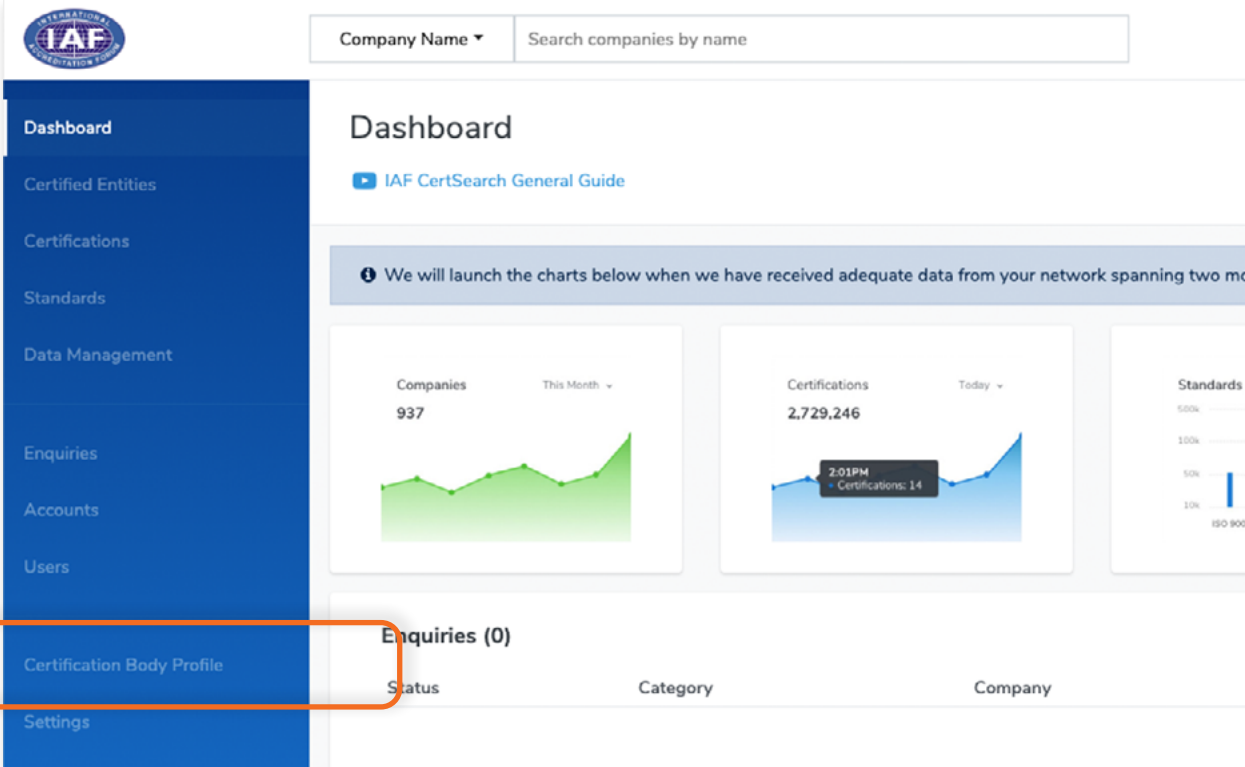
10.7 How to View Certification Body Profile

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=suzRG8cwK8M

Step 1

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

Step 2

Click **Live Profile** in the Certification Body Profile page.

Certification Body Live Profile

10.7 How to Change Information Shown in the Live Profile

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

To change the information shown in the Live Profile, go to:
10.2 How to edit Certification Body Logo
10.3 How to edit Certification Body Economy/Country
10.4 How to edit Certification Body Information
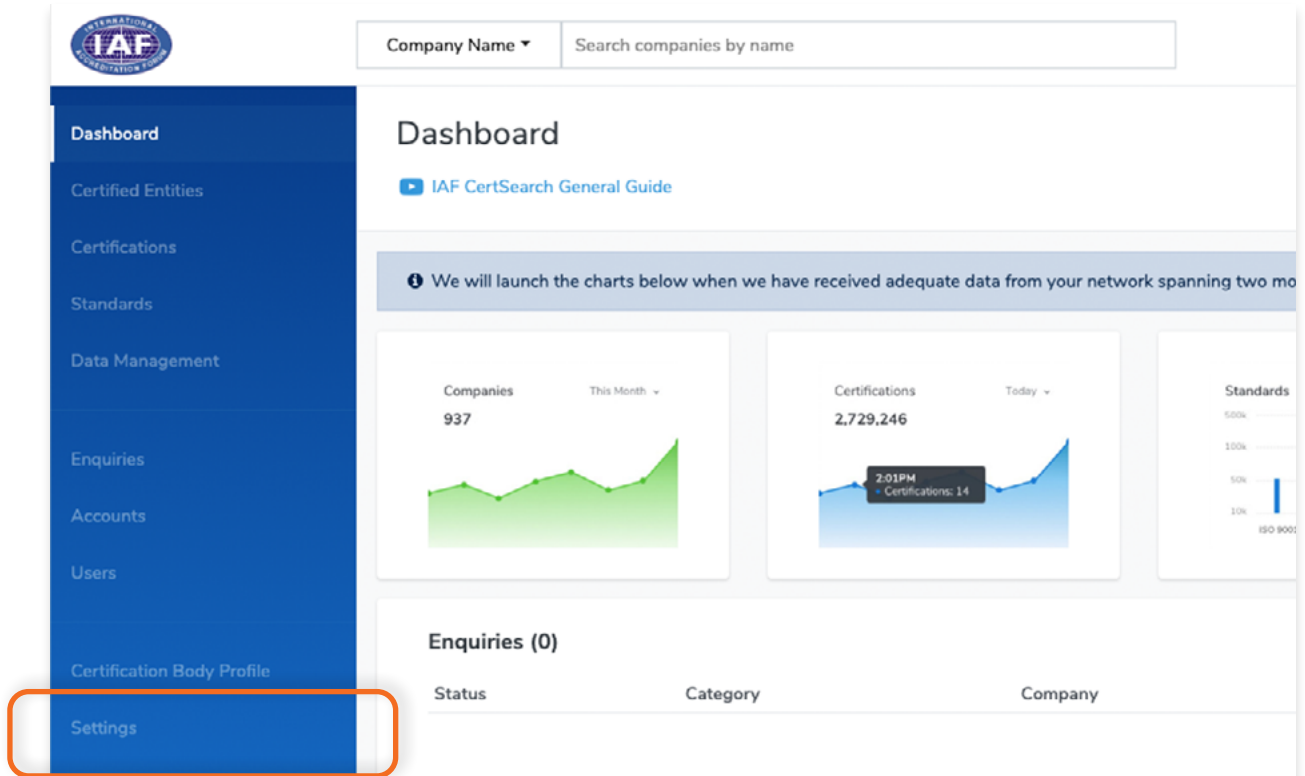
Changes made in these sections will reflect in your Live Profile.

11. Settings
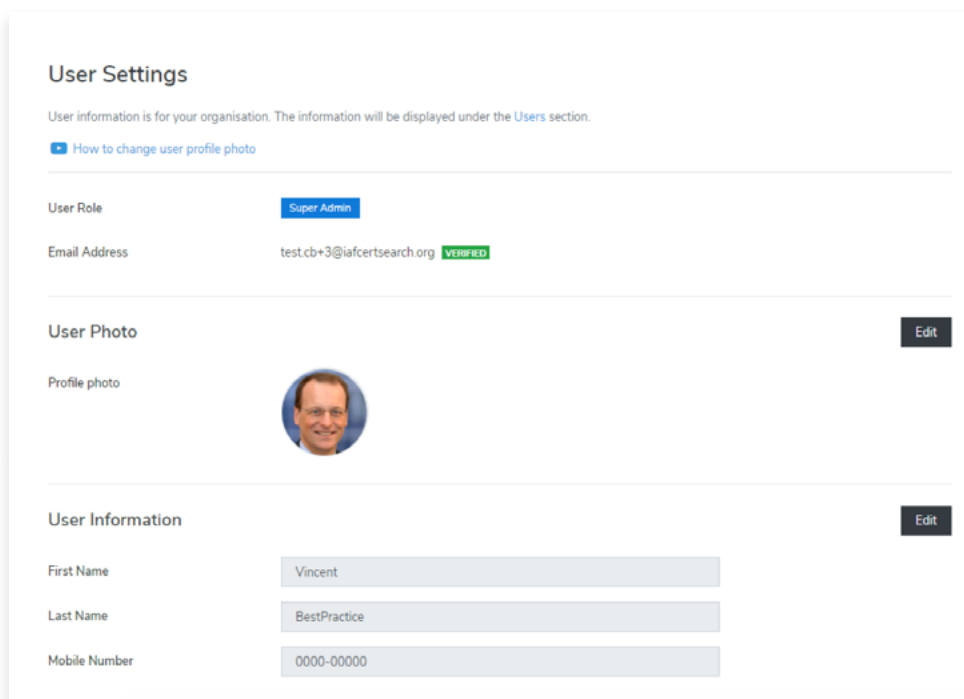
11.1 How to View User Settings

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

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

11.2 How to Edit User Photo

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=KnAy891ml7M
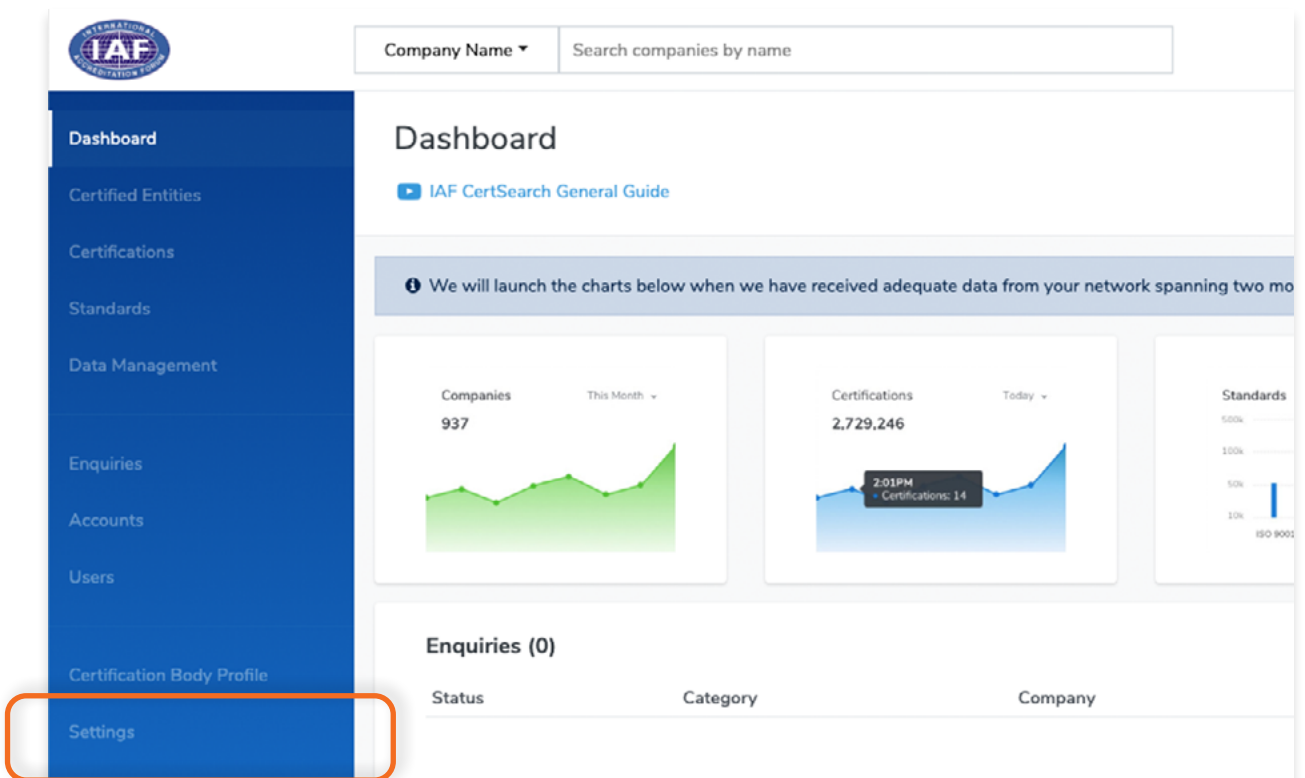
You can add or change your user photo.

Step 1

From the Dashboard, click **Settings** in the left hand navigation.

Step 2

Click **Edit** in the User Photo section

Step 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.
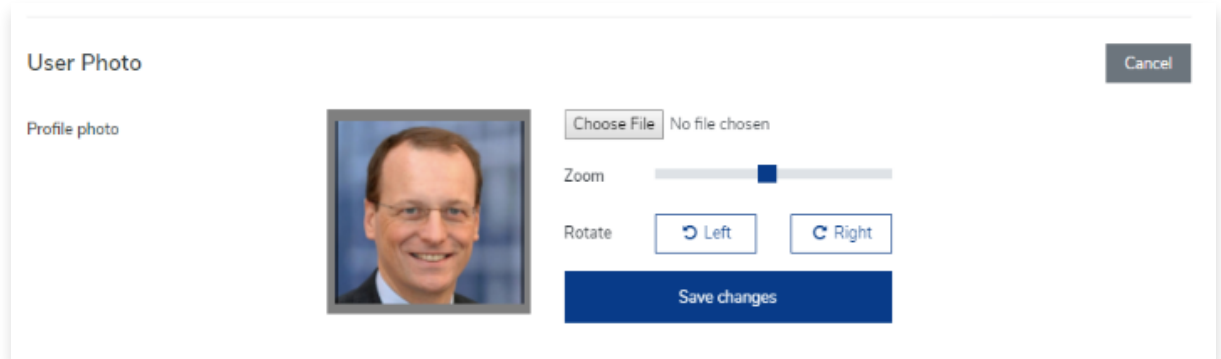
Step 4

Click **Save Changes** once done or click **Cancel** to revert changes
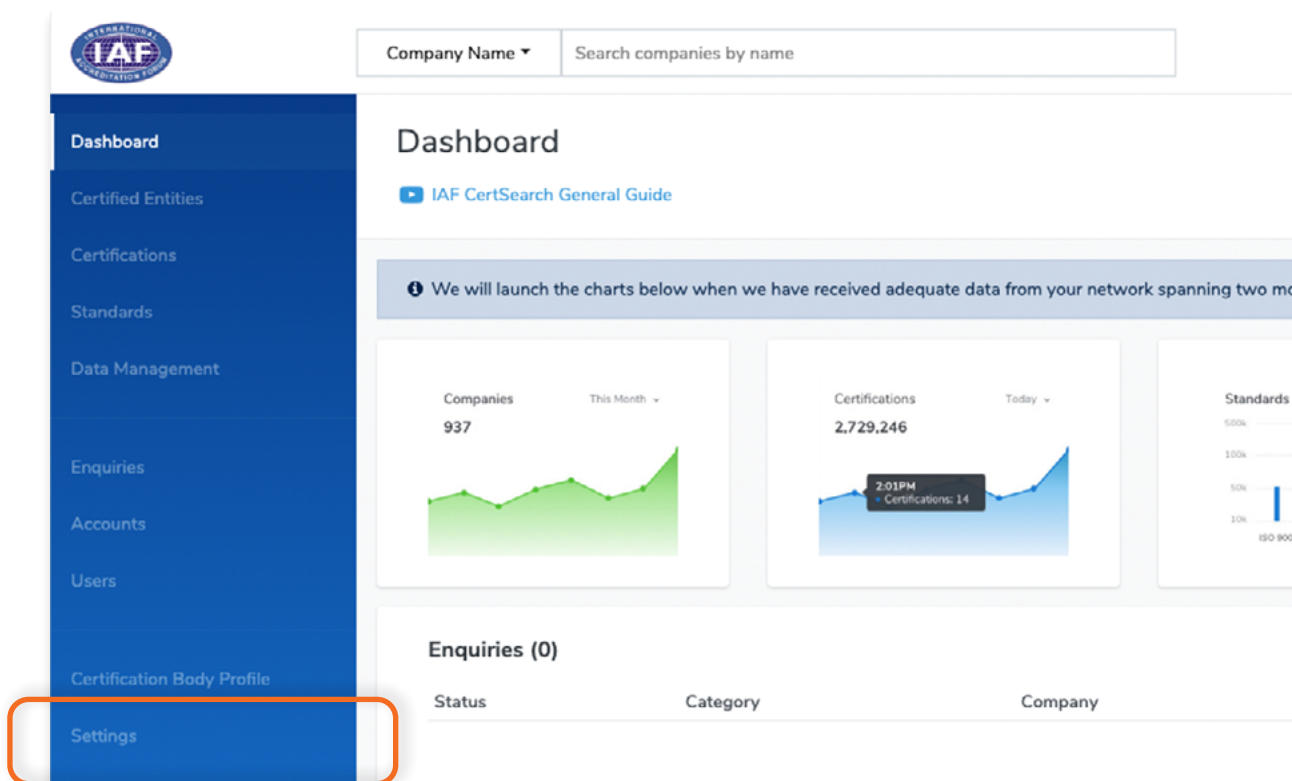
11.3 How to Edit User Information

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

Step 1

From the Dashboard, click **Settings** in the left hand navigation.

Step 2

Click **Edit** in the User Information section

Step 3

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

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

Step 4

Click **Save Changes** or click **Cancel** to revert any changes made.

11.4 How to Change Security Settings

11.4.1 How to Change the Password

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=OotseBBS2PM

Step 1

From the Dashboard, click **Settings** in the left hand navigation.
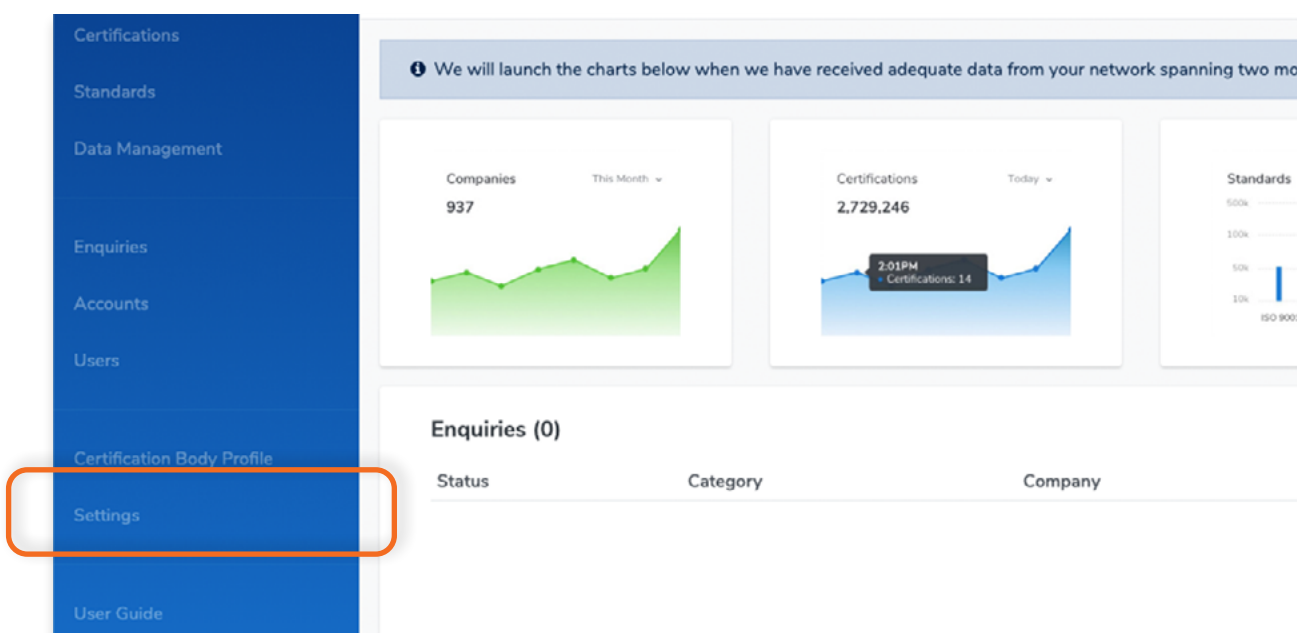
Step 2

Click **Security Settings** in the menu bar.
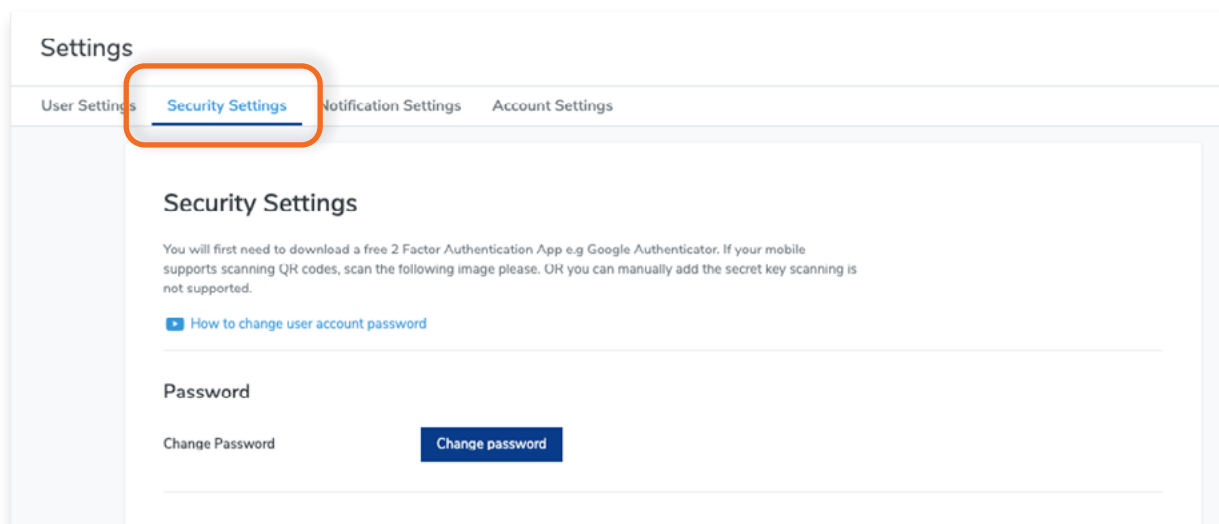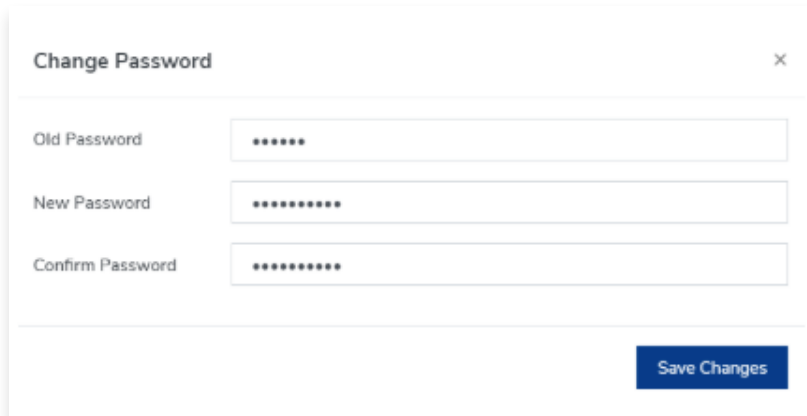
Step 3

Click **Change Password**
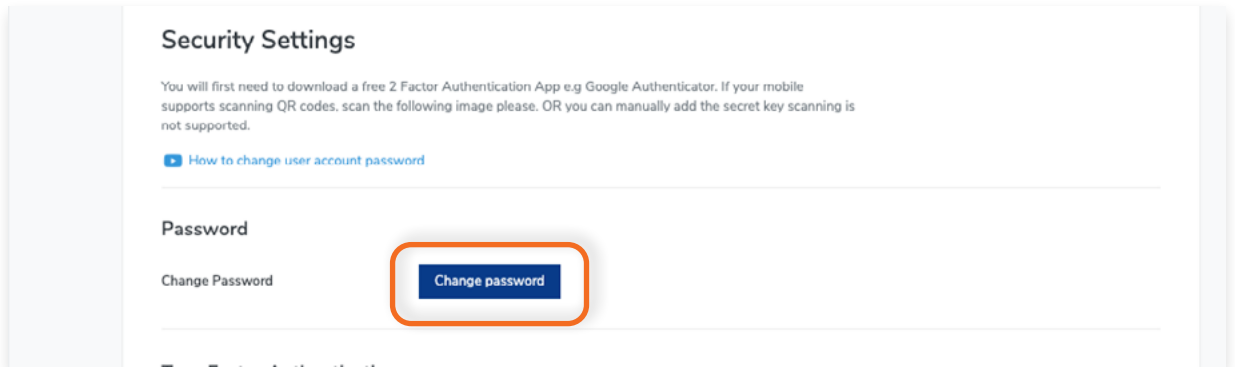
Step 4

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

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

Google Authenticator

Step 1

From the Dashboard, click **Settings** in the left hand navigation.
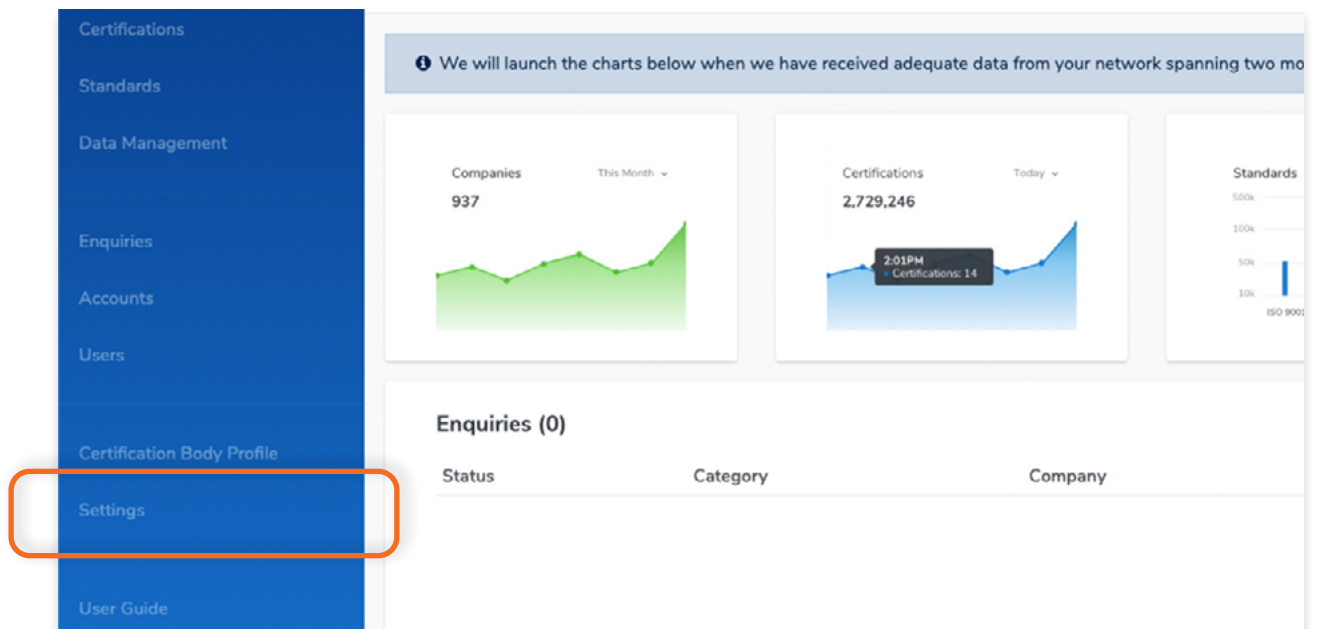
Step 2

Click Security **Settings** in the menu bar.
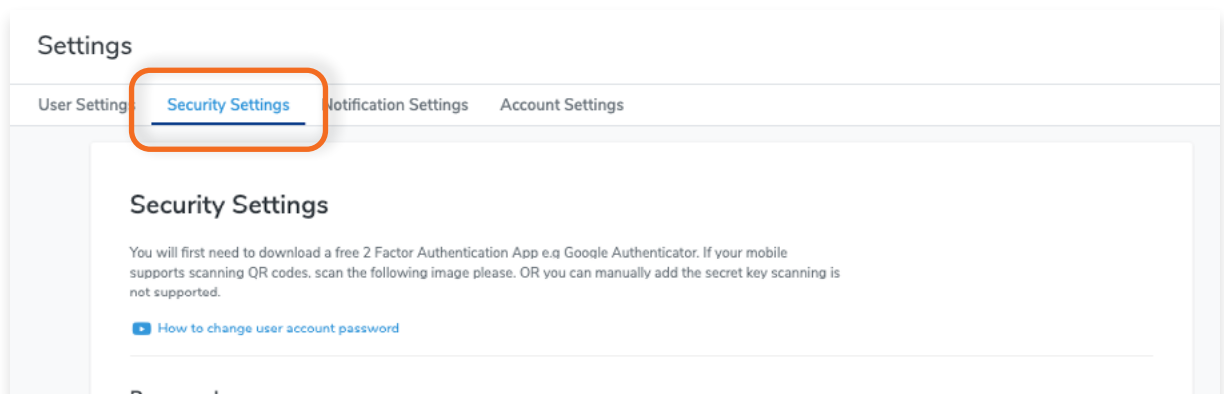
Step 3

Click **Enable Authenticator**
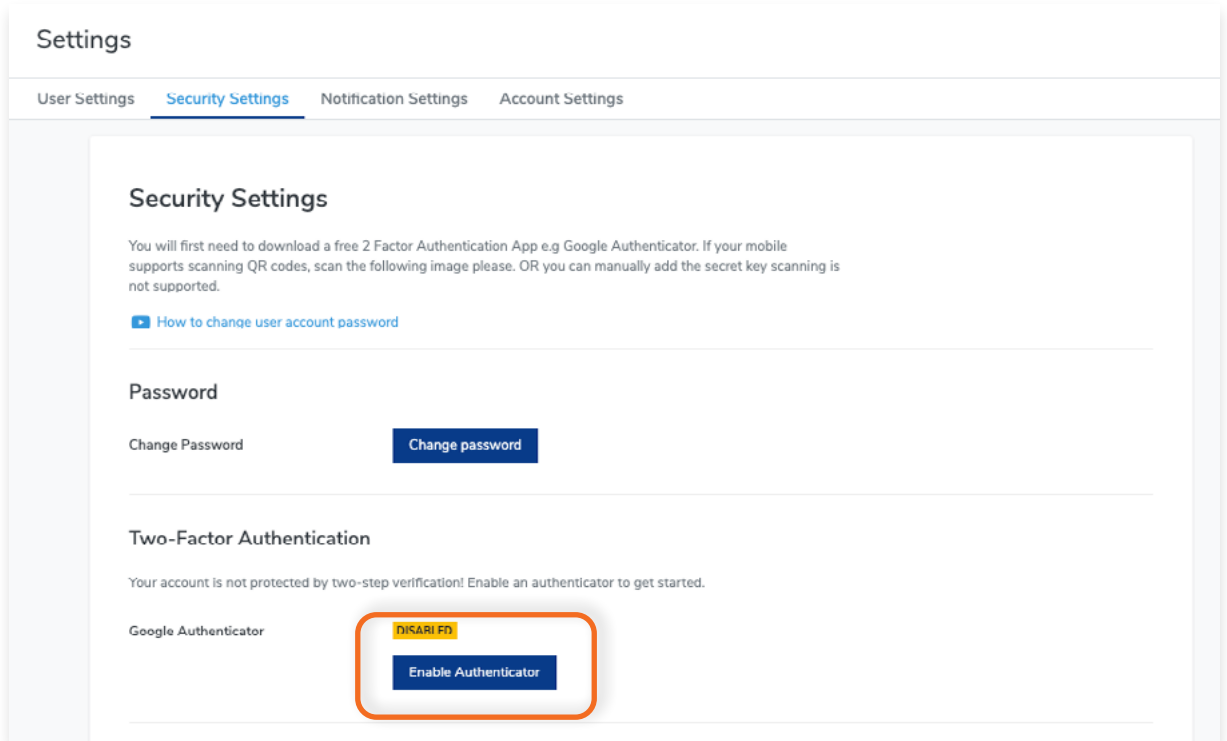
Step 4

Scan the QR code or enter the Authenticator Secret Code below it in your mobile authenticator app.
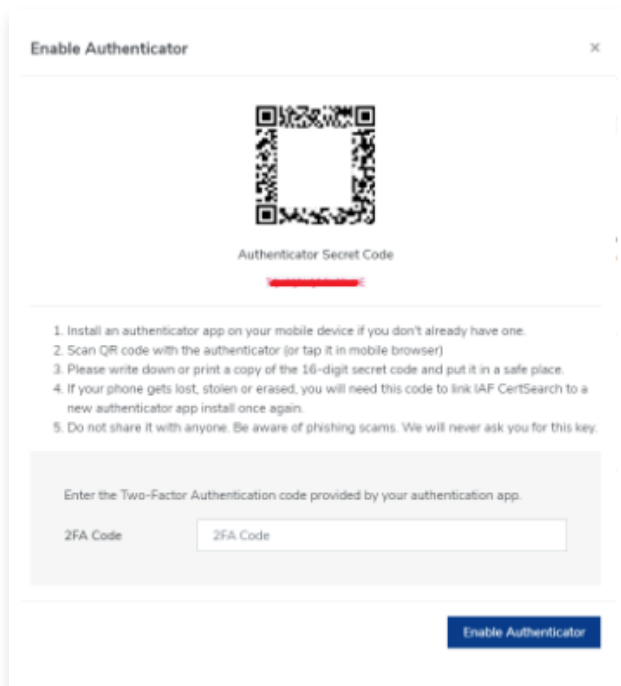
Step 5

The authenticator on your mobile will then generate a 2FA Code. Copy the code and enter it in the 2FA code
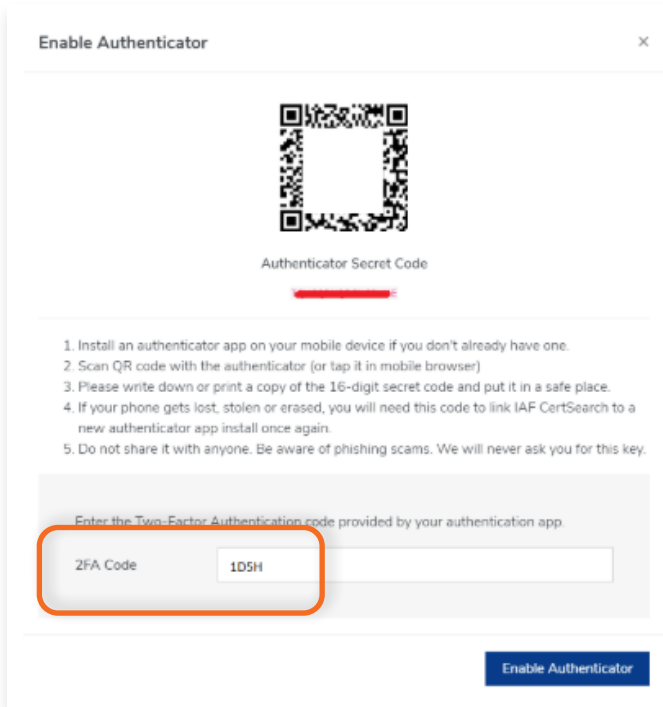
Step 6

Click **Enable Authenticator.**
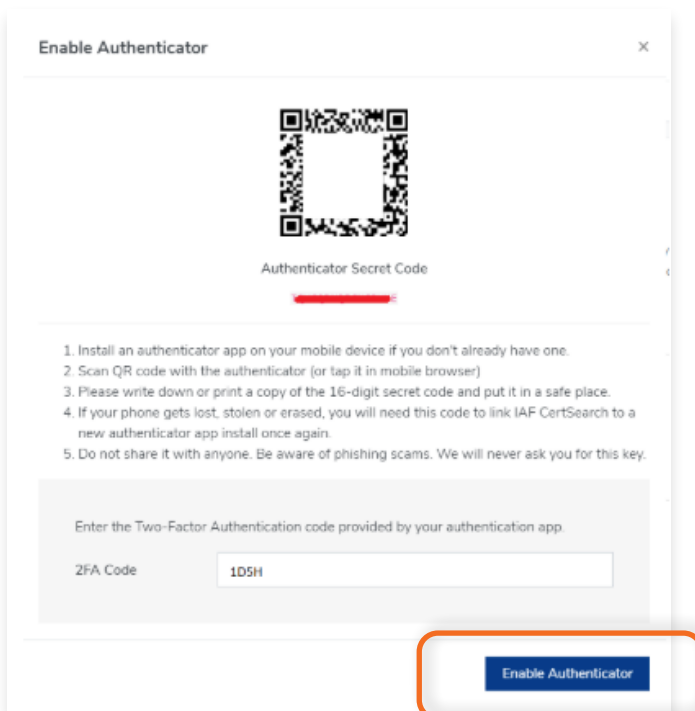
11.5   How to Change Notification Settings

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=mfEIFqFwY7Q

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 Altert and Email notifications :
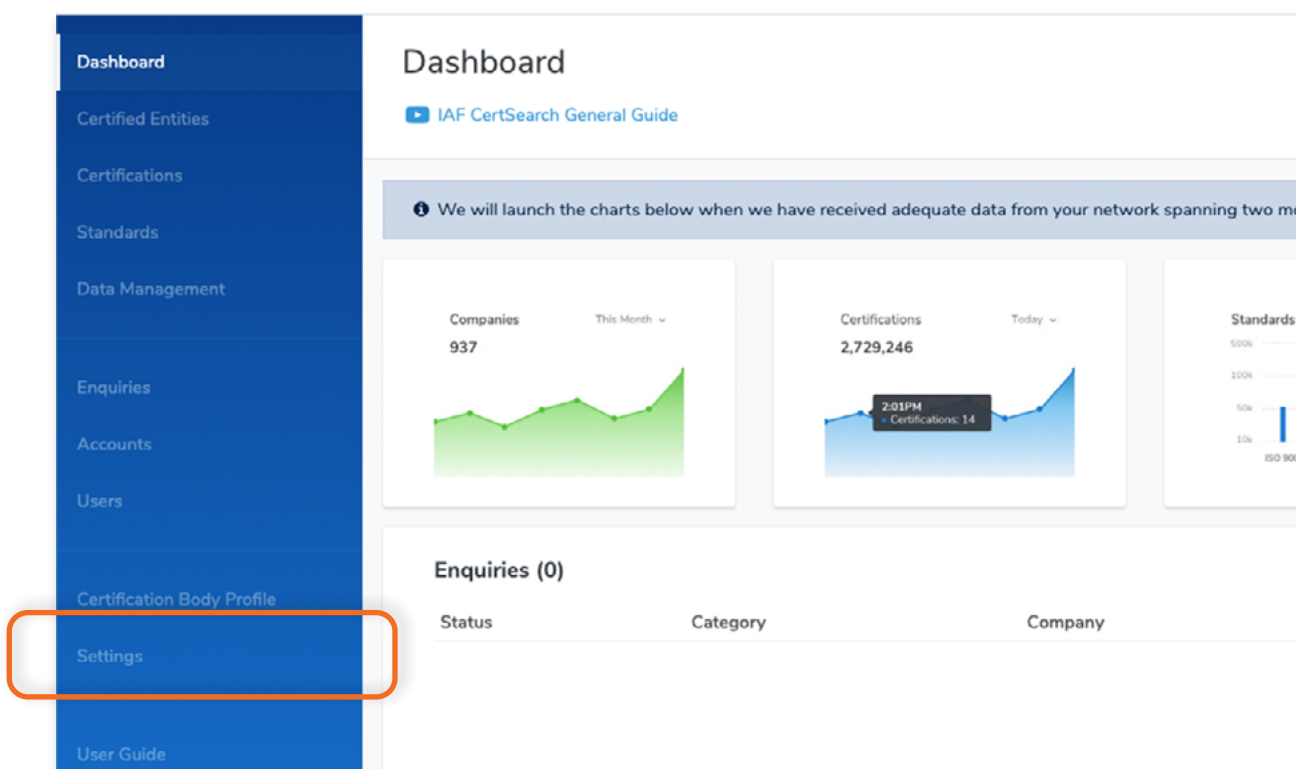
Alert Notifications
- **General Alerts**
    - Enquiry Updates - Alerts you on New Enquiries, Updates, and Activities
    - Certification Updates - Alerts you on Certification Updates and Activities
- **Data Management**
    - File Upload - Alerts you on File Uploads, Upload Status, and Error Logs

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

Step 1

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

Step 2

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

You can turn these notifications On and Off by clicking on the toggle switches. Switching the toggle to the right enables the notification, switching the toggle to the left disables the notification.

Settings

User Settings   Security Settings   Notification Settings   Account Settings

Notification Settings

Please note: You'll still receive important administrative emails, such as password resets

▶ How to manage notifications

Alert Notifications

General Alerts   ⬤ Enquiry updates
                        New enquiry, Updates, Activities

                        ⬤ Certification updates
                        Updates, Activities

Data Management   ⬤ File upload
                        File upload, Upload status, Error logs

Email Notifications

General Alerts   ⬤ Enquiry updates
                        New enquiry, Updates, Activities

Data Management   ⬤ File upload
                        File upload, Upload status, Error logs

11.6   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://www.youtube.com/watch?v=NZxM-je1JXE

How to Change the Account Email
https://www.youtube.com/watch?v=5iyiklL8iJg

How to Change the Account Website
https://www.youtube.com/watch?v=DoH2ADjPX3I

Step 1

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

Step 2

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

Step 3

Click **Edit.**

Step 4

You can now edit the Account Name, Account Email, Key Contact Name, Account Website, Economy/

Step 5

Click **Save Changes** or click **Cancel** to revert any changes made.

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=NZxM-je1JXE

Step 1

From the Dashboard, click **Settings** in the left hand navigation.

Step 2

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

Step 3

Click **Edit.**

Step 4

Edit the Account Name.

Step 5

Click **Save changes** or click **Cance**l to revert changes.
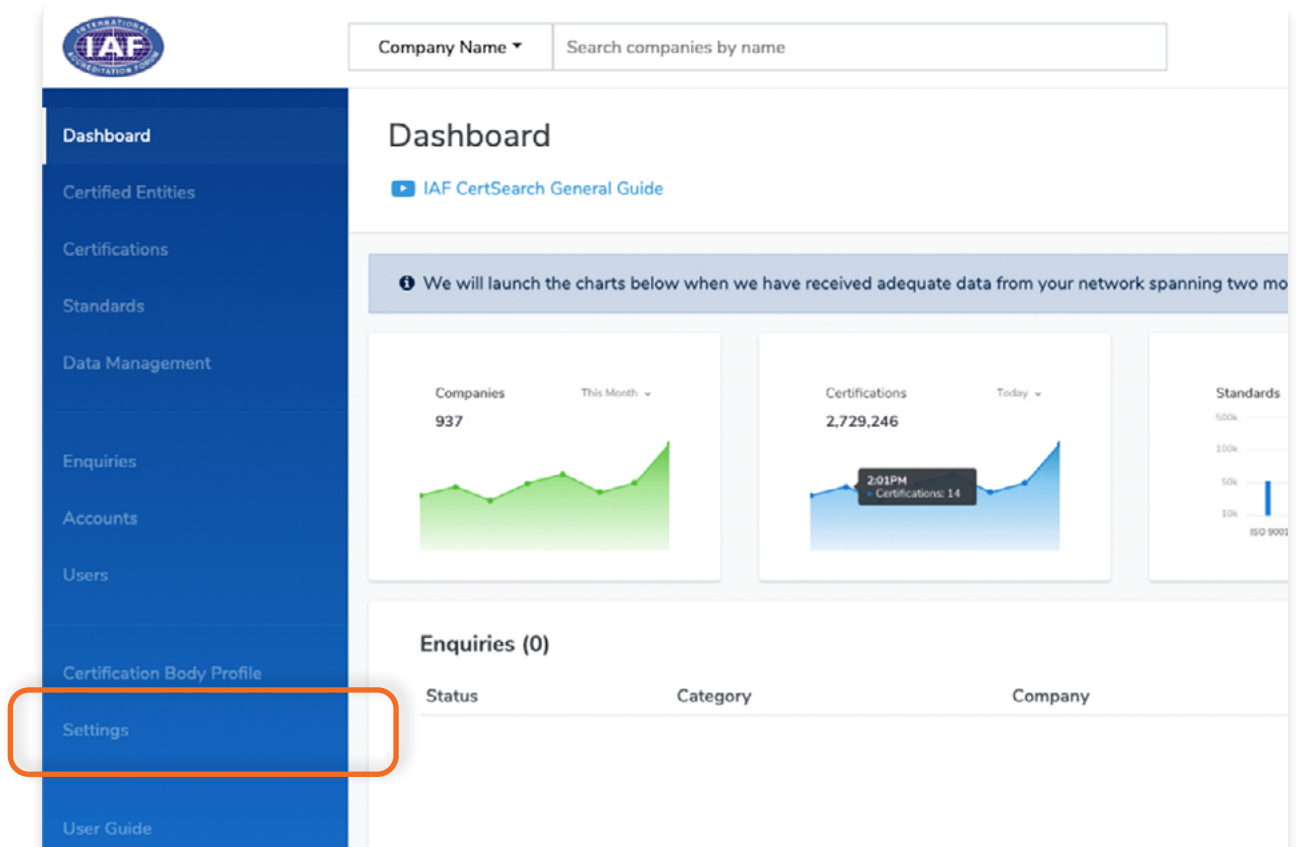
11.6.2 How to Change the Account Email

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=5iyiklL8iJg

Step 1

From the Dashboard, click **Settings** in the left hand navigation.

Step 2

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

Step 3

Click **Edit.**

Step 4

Edit the Account Email.

Step 5

Click **Save changes** or click **Cance**l to revert changes.

11.6.3 How to Change the Account Website

View the step by step guide below or watch the video guide here:
https://www.youtube.com/watch?v=DoH2ADjPX3I

Step 1

From the Dashboard, click **Settings** in the left hand navigation.

Step 2

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

Step 3

Click **Edit.**

Step 4

Edit the Account Website.

Step 5

Click **Save changes** or click **Cance**l to revert changes.

12.1 How to View the User Guide

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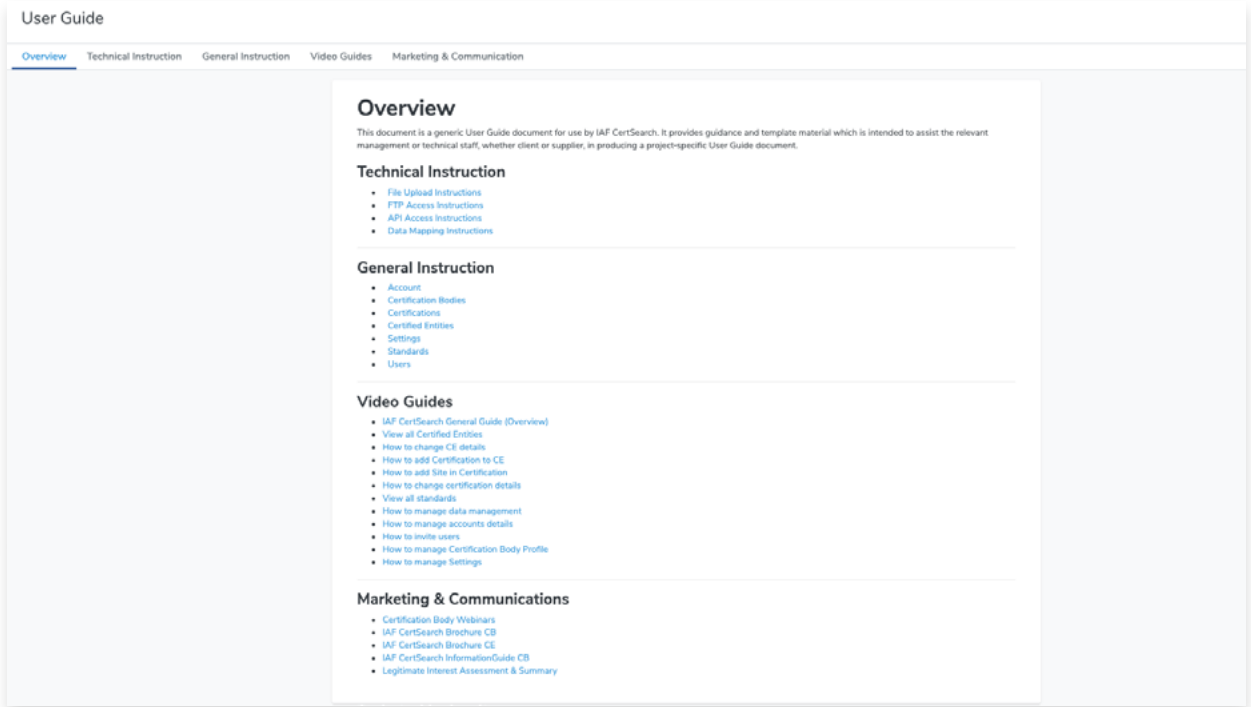
From your dashboard, click **User Guide** on the left navigation bar.

Step 2

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