

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=8FIND6c-3M4&t=3s>

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

<https://www.youtube.com/watch?v=o2zYFXhbuJ4>

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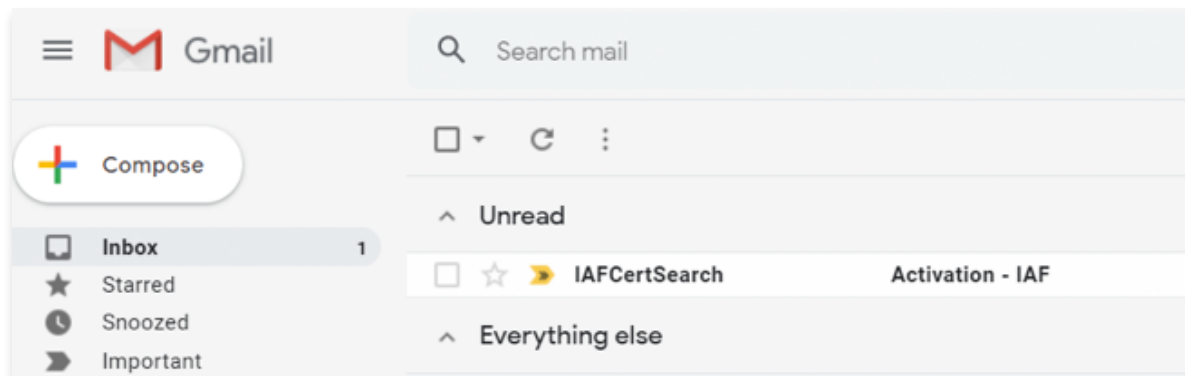
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1. Activation

1.1 How to Activate Your Account

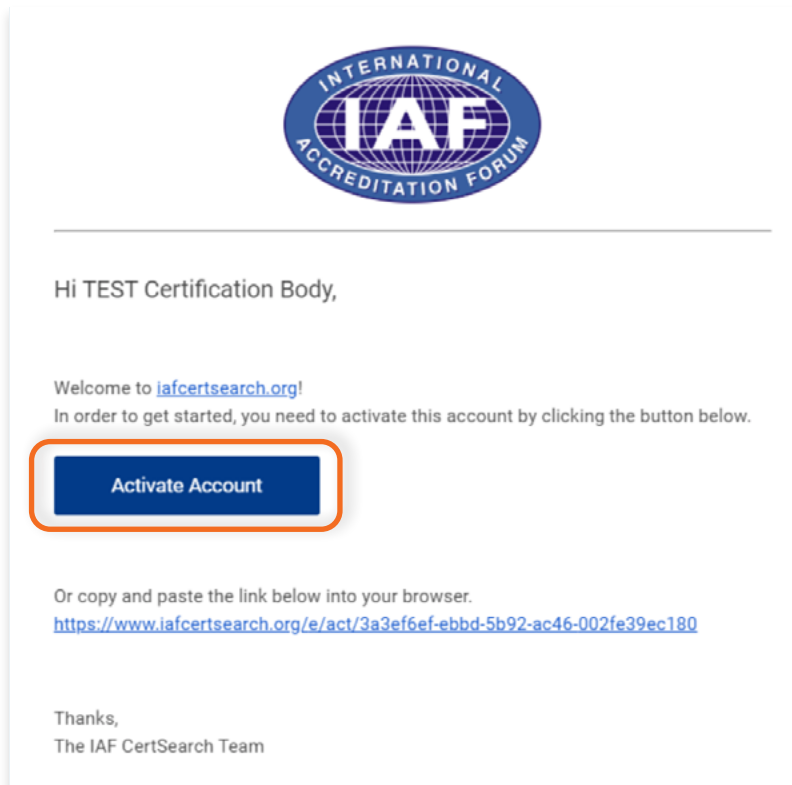
Step 1

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**

INTERNATIONAL ACCREDITATION FORUM

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. (IAF)) 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

Agree

Step 4

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

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

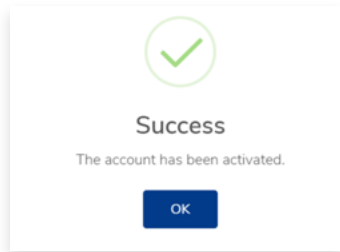
Create Password

Confirm Password

Create an Account

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

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

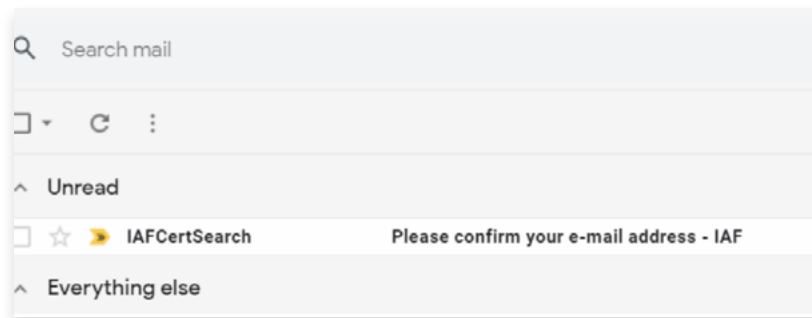


Step 5

The next step is to **confirm your email address.**

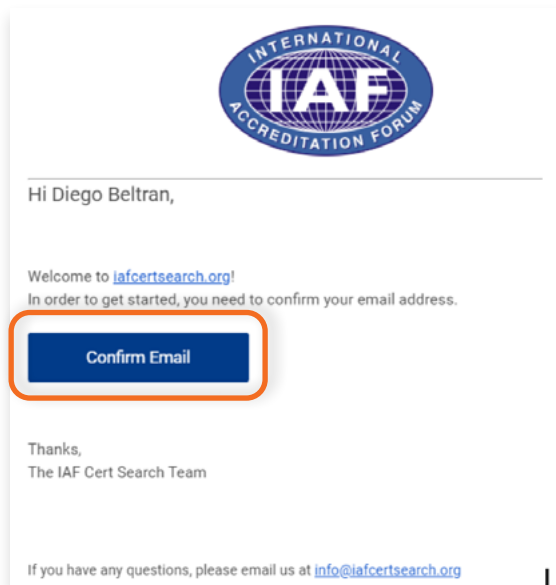
Go back to your inbox and you should receive a confirmation email.

Open the email with Subject **“Please confirm your email address -IAF”**

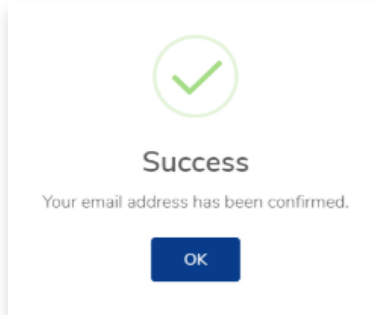


NOTE:
If you did not receive an email, Click the “Email didn’t arrive?” link and resend.

Click the **“Confirm Email”** button.

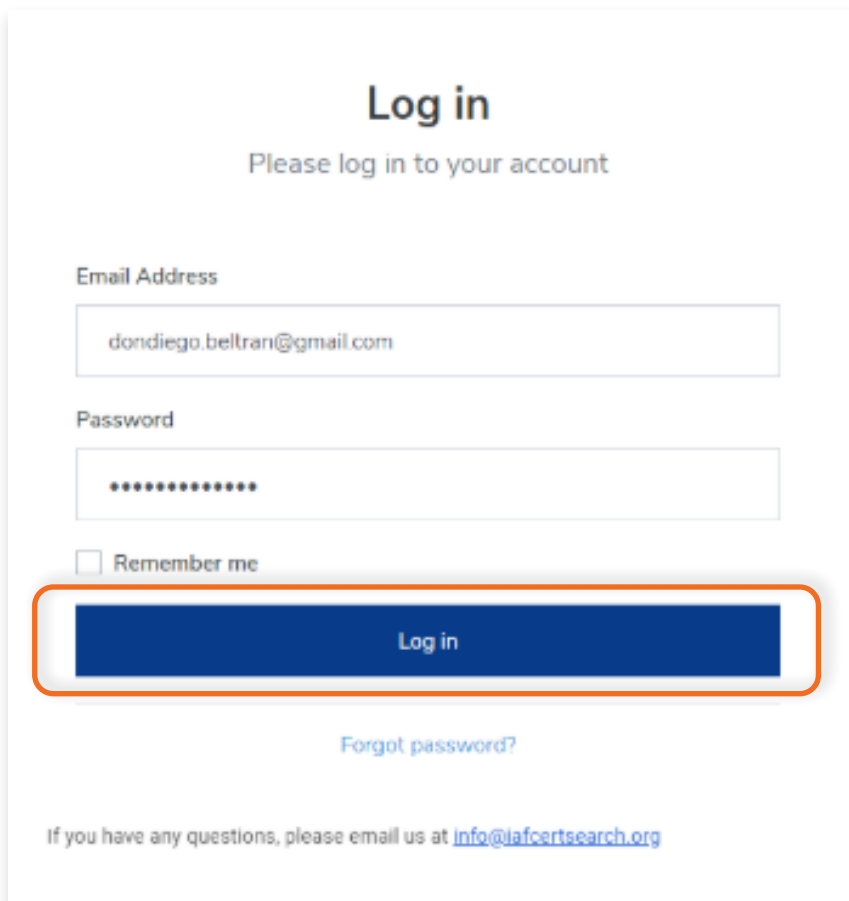


A "Success" message will pop up. Click **OK** to proceed.



Step 6

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

A white login page with the heading "Log in" and the sub-heading "Please log in to your account". Below the heading are two input fields: "Email Address" containing "dondiego.beltran@gmail.com" and "Password" containing a series of dots. Below the password field is a checkbox labeled "Remember me". A blue "Log in" button is highlighted with an orange border. Below the button is a link for "Forgot password?". At the bottom, there is a line of text: "If you have any questions, please email us at info@iafcertsearch.org".

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>

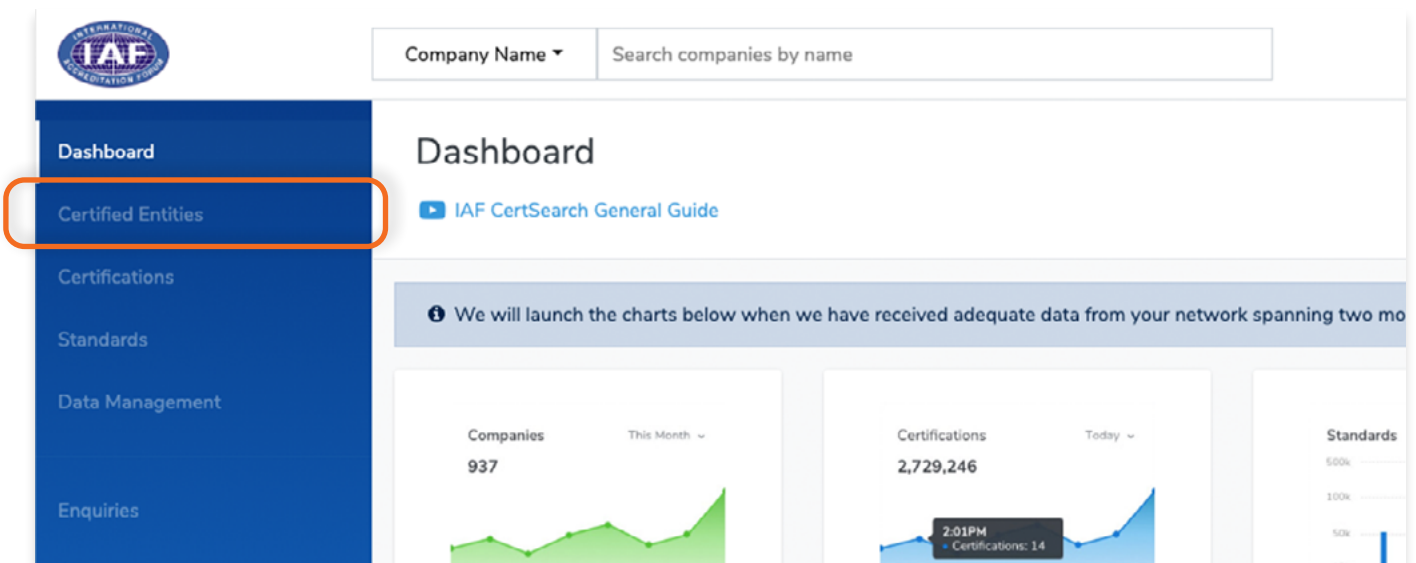
The screenshot displays the IAF CertSearch dashboard. On the left, a blue navigation menu is highlighted with an orange border, listing: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, Settings, and User Guide. The main dashboard area features a search bar for 'Company Name', a 'Dashboard' title, a link to 'IAF CertSearch General Guide', and a notification: 'We will launch the charts below when we have received adequate data from your network spanning two months or more.' Three charts are shown: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (This Month) with a bar chart for ISO 9001, ISO 14001, and ISO 45001. Below the charts is an 'Enquiries (0)' table with columns: Status, Category, Company, Subject, and Date.

3. Certified Entities

3.1 Where Can I Find a List of All Certified Entities

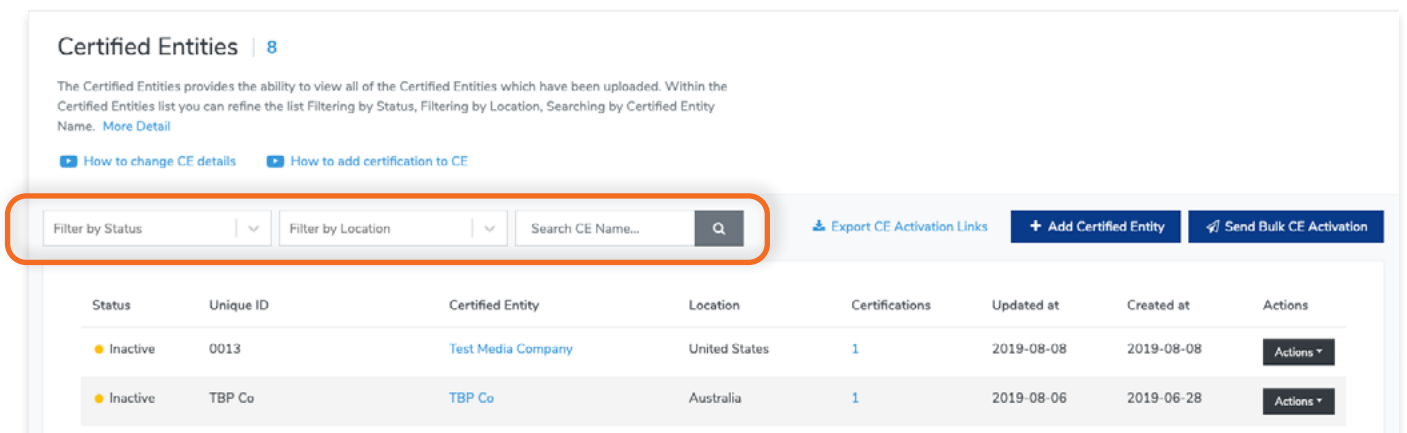
View the step by step guide below or watch the video guide here:
<https://www.youtube.com/watch?v=1O3G1Lmm9fY&feature=youtu.be>

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

Certified Entities | 8

The Certified Entities provides the ability to view all of the Certified Entities which have been uploaded. Within the Certified Entities list you can refine the list Filtering by Status, Filtering by Location, Searching by Certified Entity Name. [More Detail](#)

[How to change CE details](#) [How to add certification to CE](#)

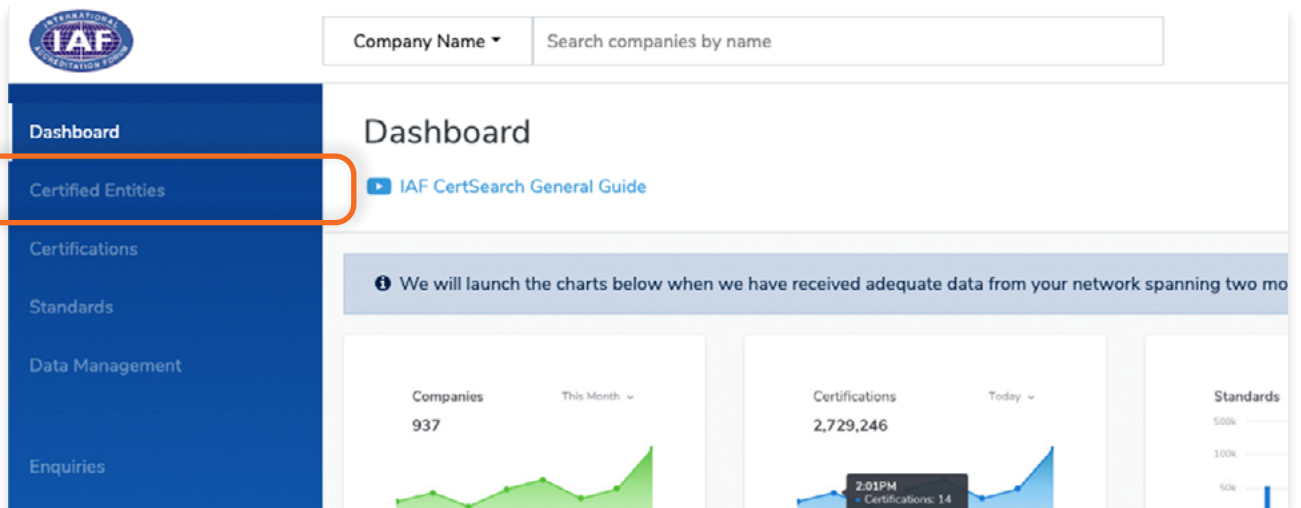
Filter by Status | Filter by Location | Search CE Name... [Export CE Activation Links](#) [+ Add Certified Entity](#) [Send Bulk CE Activation](#)

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at	Actions
Inactive	Test090CB	Test Media Company	United States	1	2019-08-08	2019-08-08	Actions
Inactive	CBC Corporation	cbc corporation	Philippines	1	2019-08-06	2019-06-28	Actions

3.2 How to View Certified Entity Information

Step 1

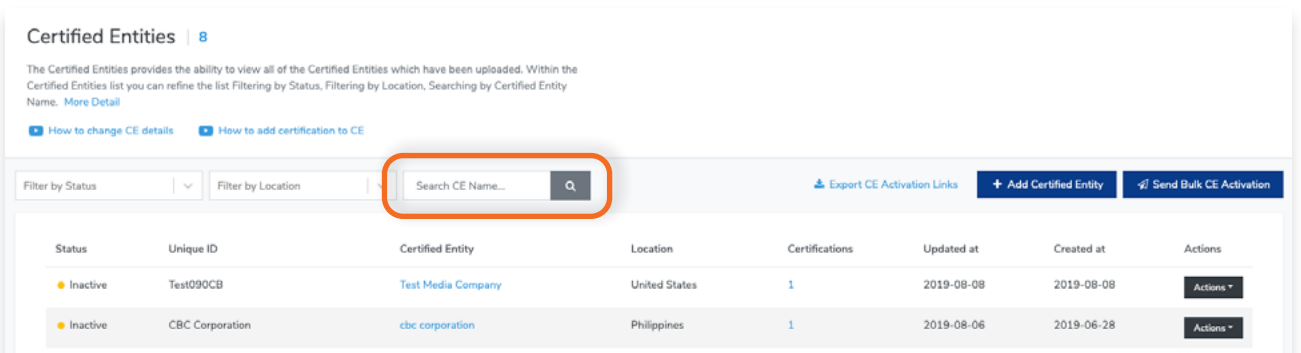
From the Dashboard, click **Certified Entities** in the left hand navigation.



The screenshot shows the IAF Dashboard interface. On the left, a blue navigation menu contains the following items: Dashboard, Certified Entities (highlighted with an orange box), Certifications, Standards, Data Management, and Enquiries. The main content area displays the dashboard title, a search bar for 'Company Name', and a video link for 'IAF CertSearch General Guide'. Below this, a notification banner states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. Three charts are visible: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (500k, 100k, 50k). A tooltip for the Certifications chart shows '2:01PM Certifications: 14'.

Step 2

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



The screenshot shows the 'Certified Entities' page. At the top, it says 'Certified Entities | 8'. Below this is a descriptive paragraph: 'The Certified Entities provides the ability to view all of the Certified Entities which have been uploaded. Within the Certified Entities list you can refine the list Filtering by Status, Filtering by Location, Searching by Certified Entity Name. More Detail'. There are two links: 'How to change CE details' and 'How to add certification to CE'. Below the text are filters for 'Filter by Status' and 'Filter by Location'. A search bar labeled 'Search CE Name...' is highlighted with an orange box. To the right of the search bar are buttons for 'Export CE Activation Links', '+ Add Certified Entity', and 'Send Bulk CE Activation'. Below the filters and search bar is a table with the following columns: Status, Unique ID, Certified Entity, Location, Certifications, Updated at, Created at, and Actions.

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at	Actions
Inactive	Test090CB	Test Media Company	United States	1	2019-08-08	2019-08-08	Actions
Inactive	CBC Corporation	cbc corporation	Philippines	1	2019-08-06	2019-06-28	Actions

Step 3

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

Certified Entities | 8

The Certified Entities provides the ability to view all of the Certified Entities which have been uploaded. Within the Certified Entities list you can refine the list Filtering by Status, Filtering by Location, Searching by Certified Entity Name. [More Detail](#)

[How to change CE details](#) [How to add certification to CE](#)

Filter by Status Filter by Location Search CE Name...

[Export CE Activation Links](#) [+ Add Certified Entity](#) [Send Bulk CE Activation](#)

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at	Actions
Inactive	Test090CB	Test Media Company	United States	1	2019-08-08	2019-08-08	Actions +
Inactive	CBC Corporation	cbc corporation	Philippines	1	2019-08-06	2019-06-11	View Details Add Certification Send Activation Email
Inactive	MNL Publishing	mnl publishing	Australia	1	2019-08-06	2019-06-11	Send Activation Email



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

Certified Entities / Test Media Company

Test Media Company

[Details](#) [Certifications](#) [Live Profile](#)

Activate Company

Activation Email [Send Activation Email](#)

Activation Link [http://sta](#) [Copy Link](#)

Email History

Status	Send date
No Results Found	

Company Details

Status

When the email holder clicks the activation link and signs up, the company status will be active.

Company Status

Company Logo [Edit](#)

Company Logo

Company Location [Edit](#)

Economy/Country

Address

Company Information [Edit](#)

Company Name

Company Trading Name

Company English Name

Private Information [Edit](#)

Unique ID

Company Email

Key Contact Name

Company Website

Certified Entities / Test Media Company

Test Media Company

[Details](#) [Certifications](#) [Live Profile](#)

Activate Company

Activation Email [Send Activation Email](#)

Activation Link [http://sta](#) [Copy Link](#)

Email History

Status	Send date
No Results Found	

Company Details

Status

When the email holder clicks the activation link and signs up, the company status will be active.

Company Status

Company Logo [Edit](#)

Company Logo

Company Location [Edit](#)

Economy/Country

Address

Company Information [Edit](#)

Company Name

Company Trading Name

Company English Name

Private Information [Edit](#)

Unique ID

Company Email

Key Contact Name

Company Website

Certifications

Certified Entities / Test Media Company / Certifications

Test Media Company

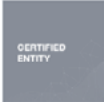
Details **Certifications** Live Profile

Filter by Status Filter by AB Search Cert No.

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	<input type="button" value="View"/>

Live Profile

Certified Entity



Test Media Company

Location Santa Fe, NM, United States

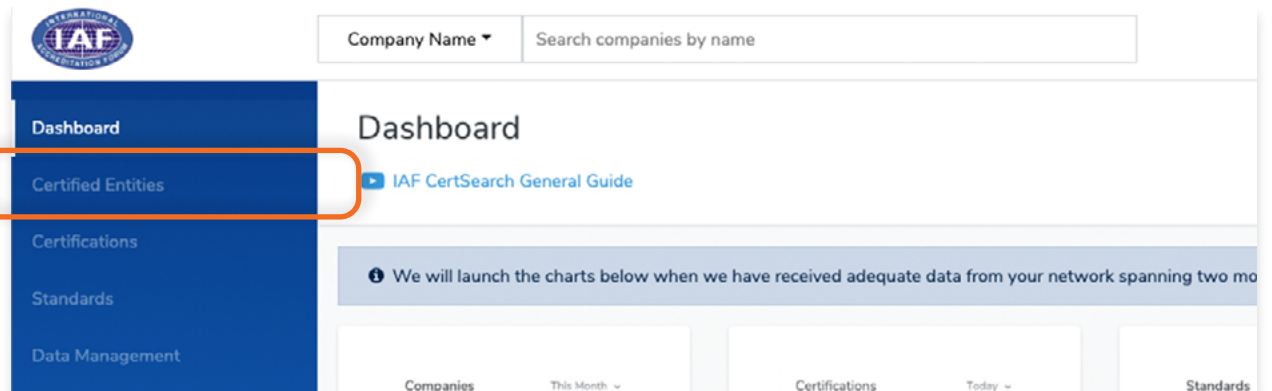
Certifications (1)

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

3.3 How to Edit/Update Certified Entity Details

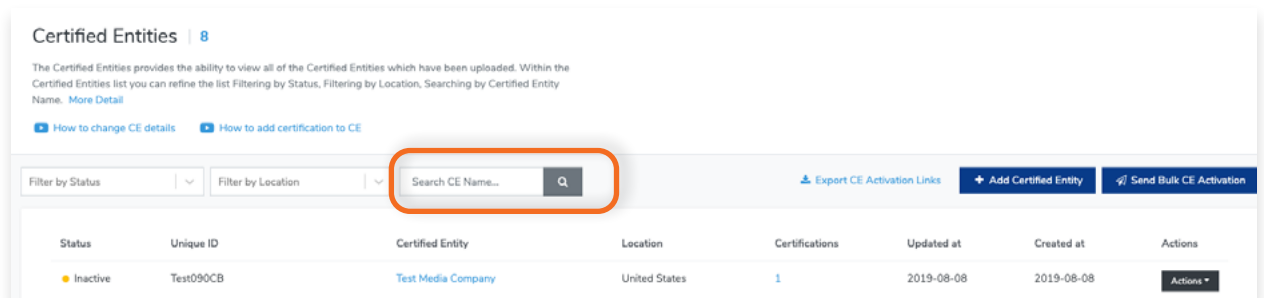
Step 1

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



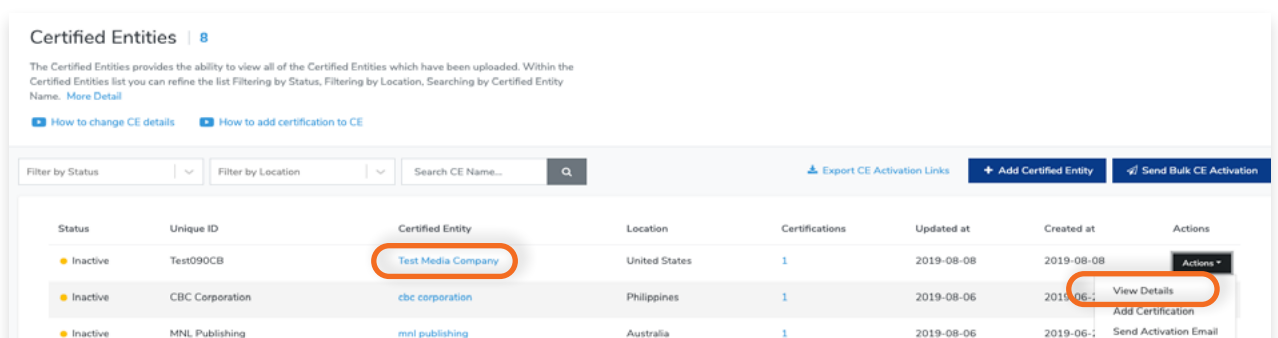
Step 2

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.

The screenshot displays the 'Test Media Company' details page. The page is divided into several sections, each with an 'Edit' button:

- Company Details:** Includes a 'Status' dropdown menu currently set to 'Inactive'. An 'Edit' button is located to the right of this section.
- Company Logo:** Shows a placeholder for the company logo. An 'Edit' button is located to the right.
- Company Location:** Includes a dropdown for 'Economy/Country' (set to 'United States') and a text field for 'Address' (set to 'Santa Fe, NM, USA'). An 'Edit' button is located to the right.
- Company Information:** Includes text fields for 'Company Name', 'Company Trading Name', and 'Company English Name', all containing the value 'Test090CB'. An 'Edit' button is located to the right.
- Private Information:** Includes text fields for 'Unique ID' (0013), 'Company Email' (diego.beltran@qualitytrade.com), 'Key Contact Name' (Diego Beltran), and 'Company Website' (Company Website). An 'Edit' button is located to the right.

At the bottom of the page, there is a prominent blue 'Save changes' button. The 'Edit' buttons for the Logo, Location, Information, and Private Information sections are highlighted with orange circles in the image.



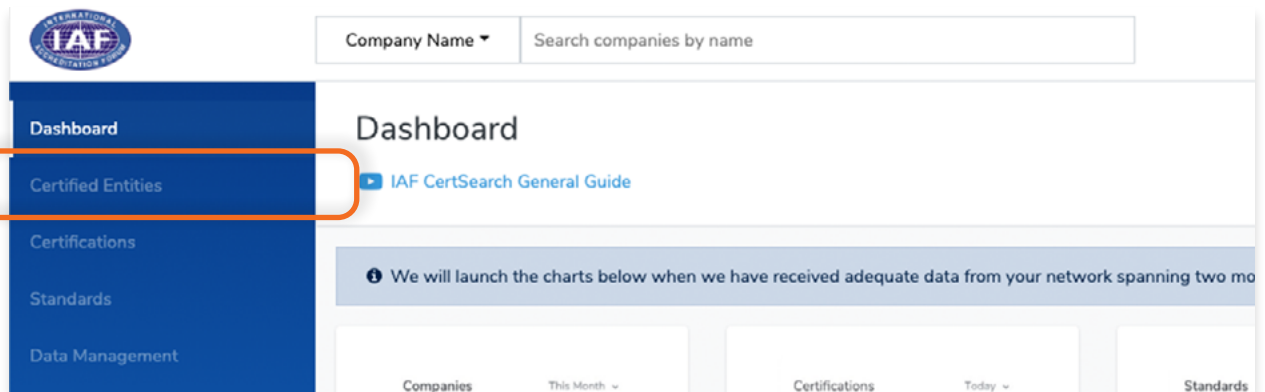
3.3.2 How to Edit Certified Entity Logo

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

<https://youtu.be/6bGPhfy4wuo>

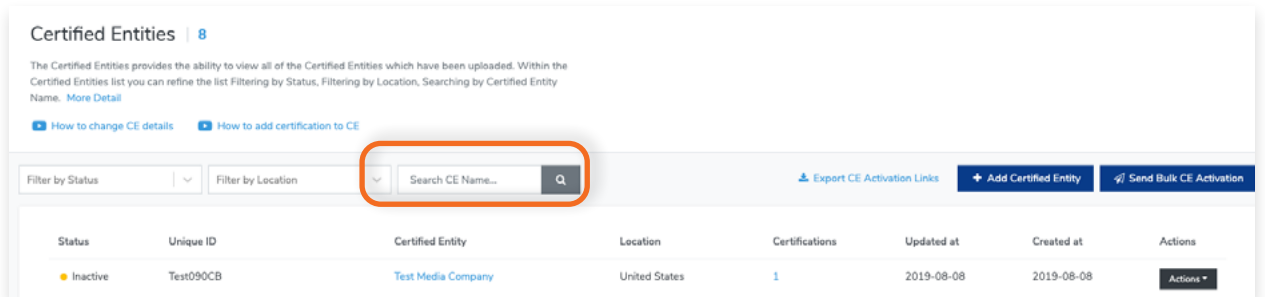
Step 1

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



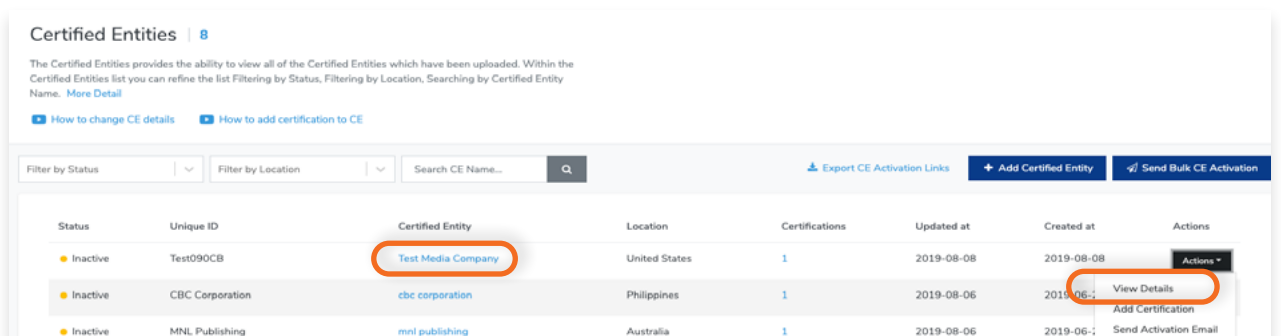
Step 2

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



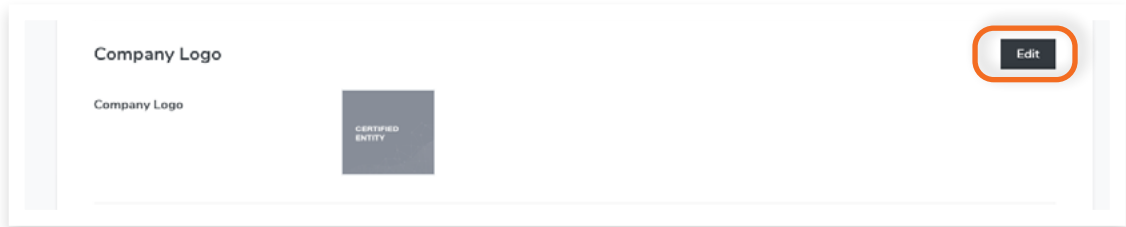
Step 3

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.

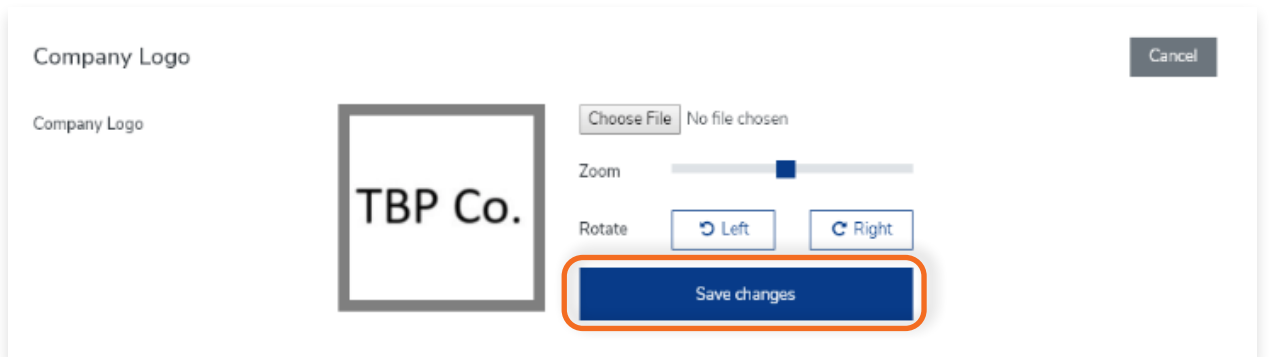


Step 5

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.



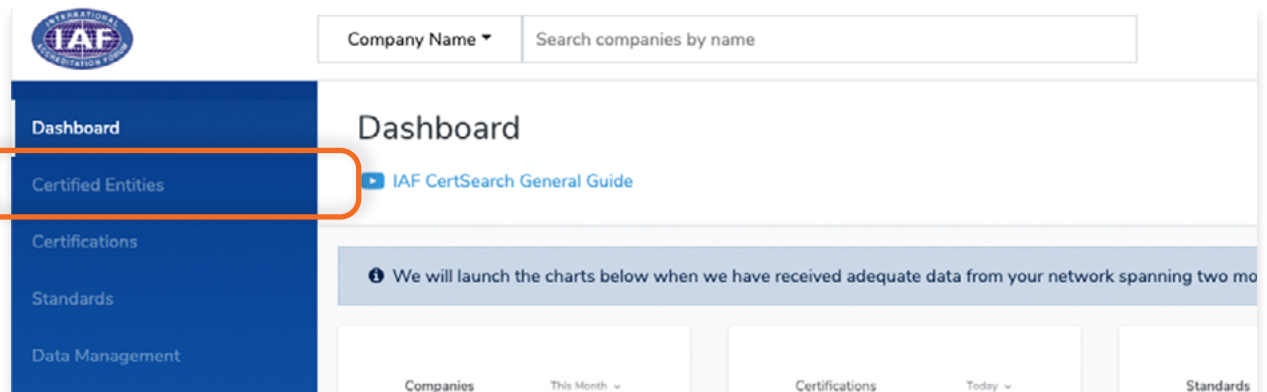
3.3.3 How to Edit Certified Entity Location

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

<https://youtu.be/6bGPhfy4wuo>

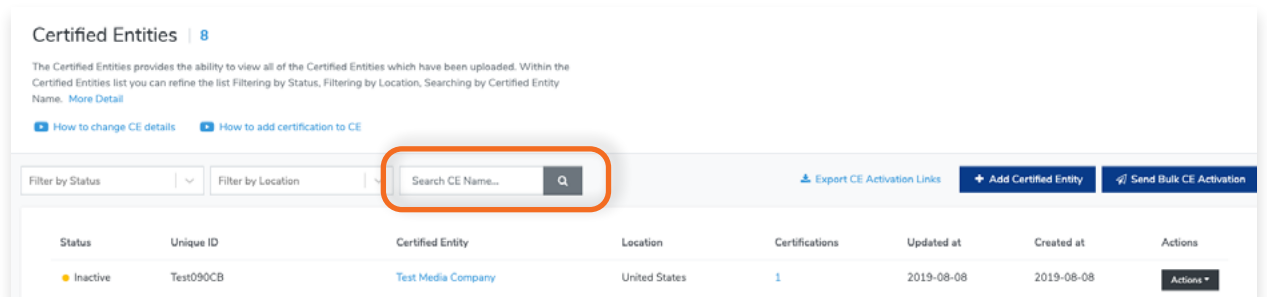
Step 1

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



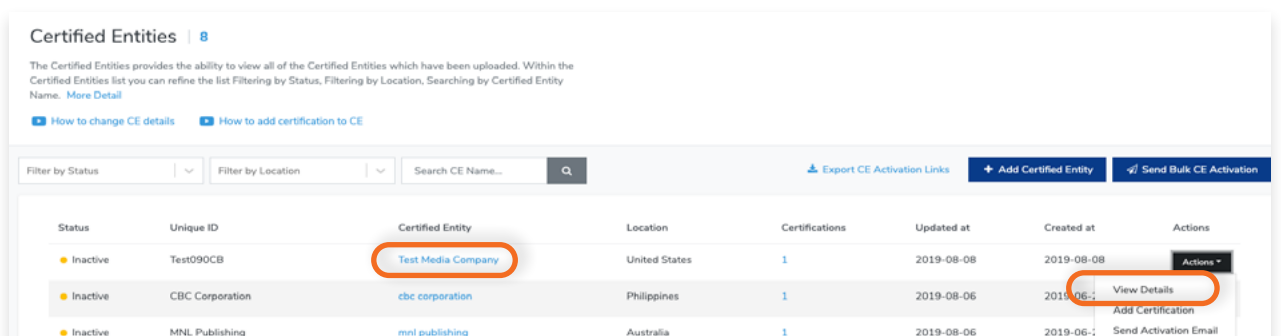
Step 2

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



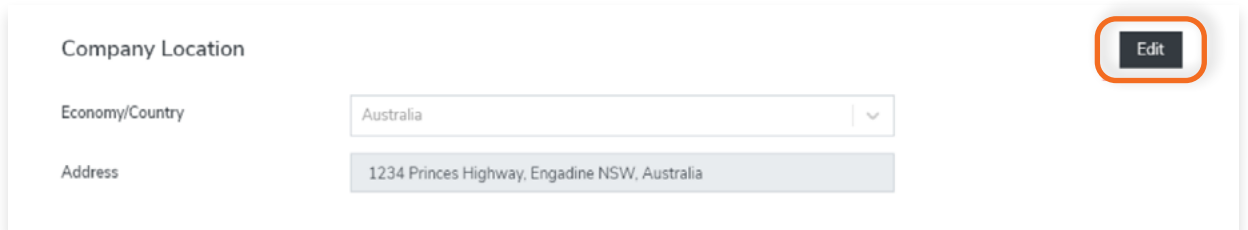
Step 3

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**.



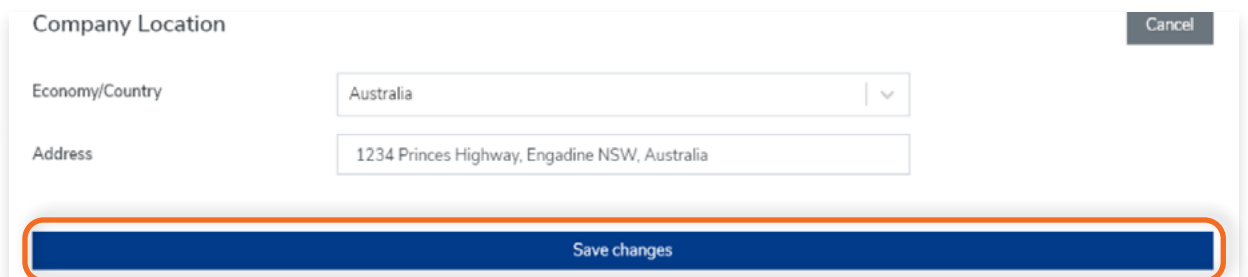
The screenshot shows a 'Company Location' section. It contains two input fields: 'Economy/Country' with a dropdown menu showing 'Australia' and 'Address' with a text input field containing '1234 Princes Highway, Engadine NSW, Australia'. In the top right corner, there is a dark grey button labeled 'Edit' which is highlighted with a red rounded rectangle.

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.



The screenshot shows the same 'Company Location' section as in Step 4. The 'Economy/Country' dropdown and 'Address' text input field are now highlighted with a red rounded rectangle. At the bottom of the form, a large blue button labeled 'Save changes' is also highlighted with a red rounded rectangle. In the top right corner, there is a dark grey button labeled 'Cancel'.



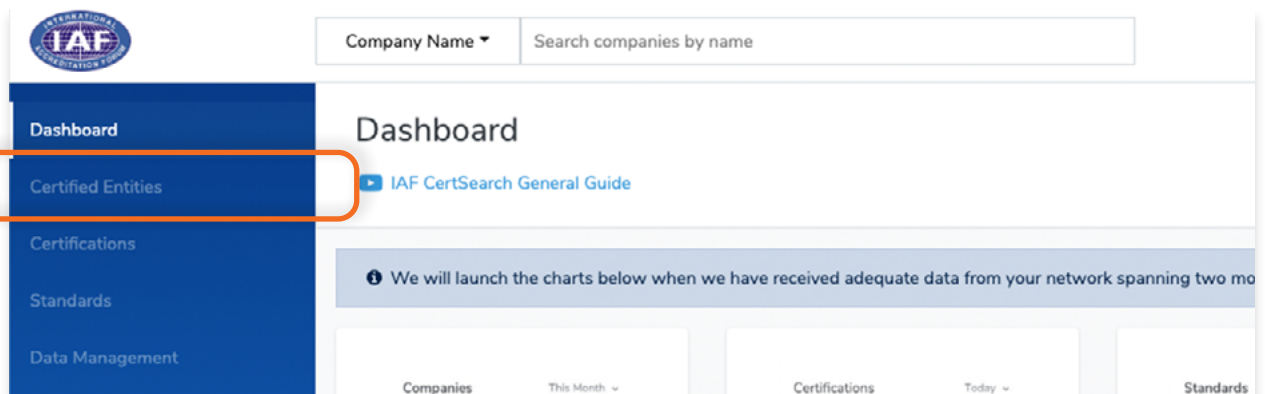
3.3.4 How to Edit Company Information

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

<https://youtu.be/6bGPhfy4wuo>

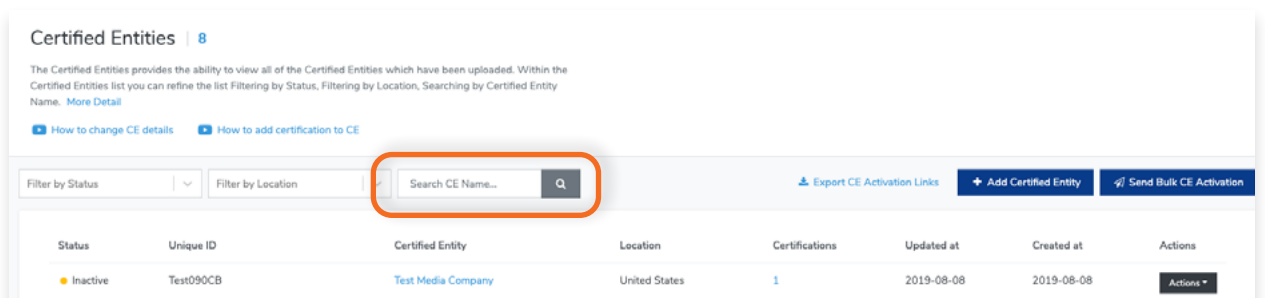
Step 1

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



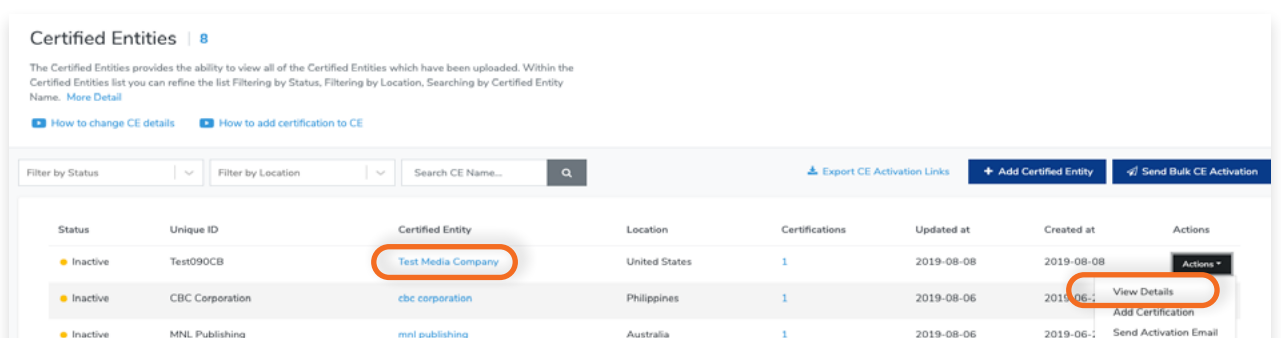
Step 2

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



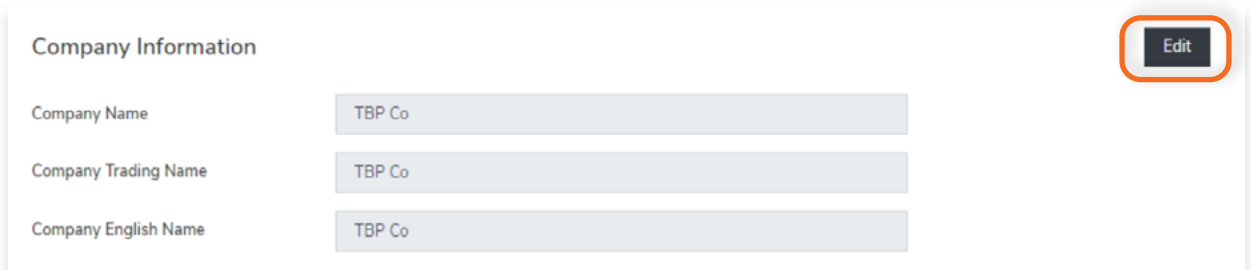
Step 3

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**.



The screenshot shows a 'Company Information' section with three input fields, each containing 'TBP Co'. The fields are labeled 'Company Name', 'Company Trading Name', and 'Company English Name'. In the top right corner, there is a dark grey button labeled 'Edit', which is highlighted with a red rectangular border.

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.



The screenshot shows the same 'Company Information' section as in Step 4, but with the 'Edit' button replaced by a dark grey 'Cancel' button in the top right corner. At the bottom of the form, there is a wide, dark blue button labeled 'Save changes', which is highlighted with a red rectangular border.



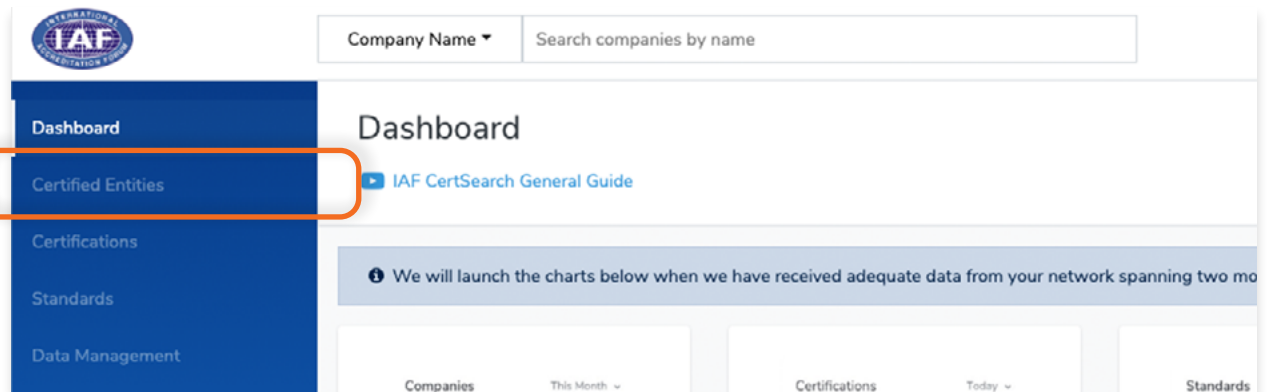
3.3.5 How to Edit Private Information

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

<https://youtu.be/6bGPhfy4wuo>

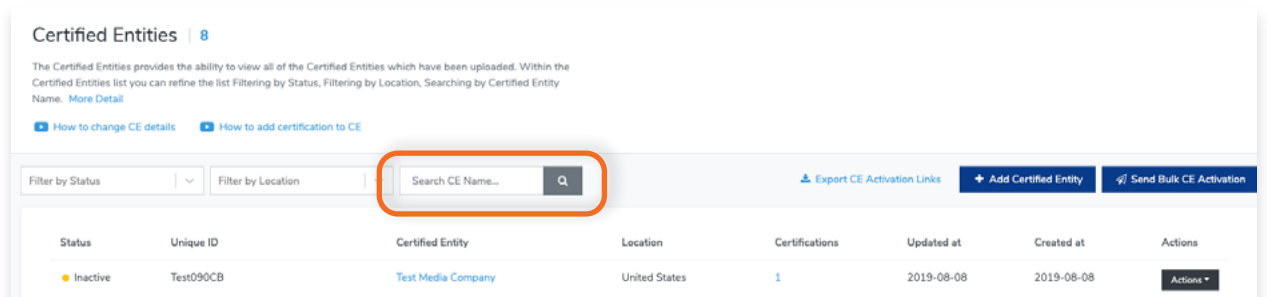
Step 1

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



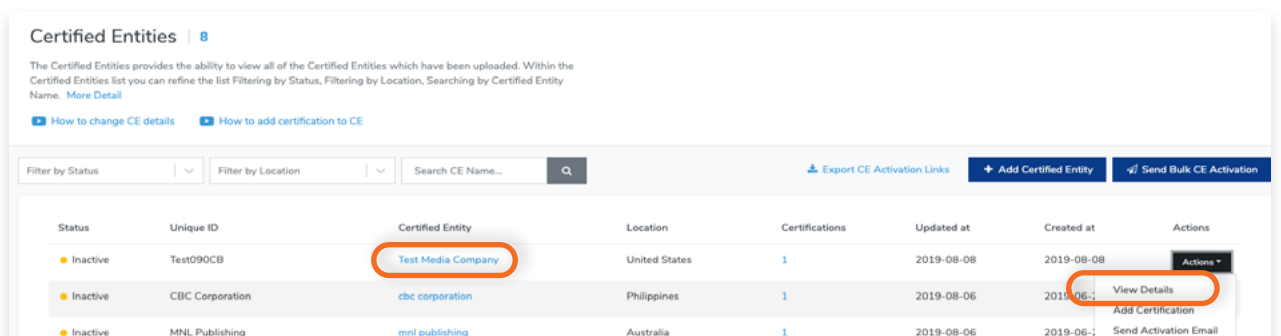
Step 2

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



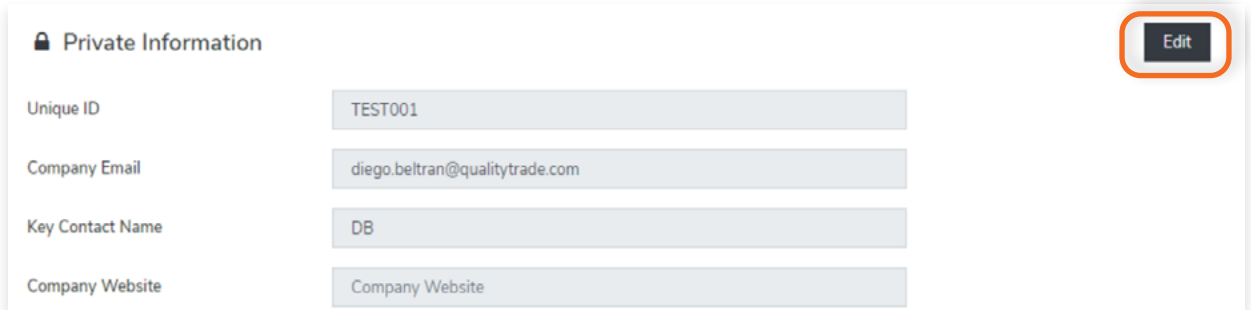
Step 3

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**.



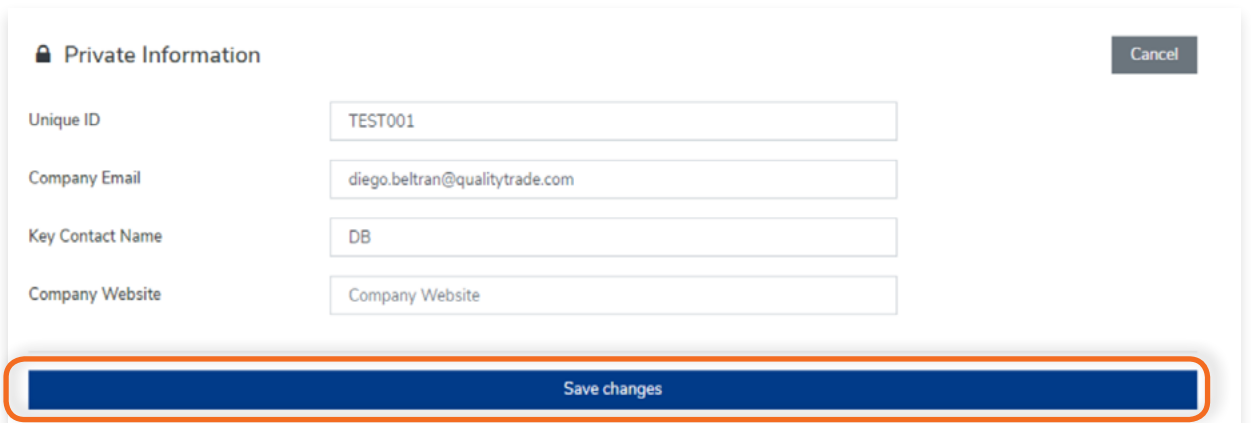
The screenshot shows a form titled "Private Information" with a lock icon. It contains four input fields: "Unique ID" (TEST001), "Company Email" (diego.beltran@qualitytrade.com), "Key Contact Name" (DB), and "Company Website" (Company Website). An "Edit" button is located in the top right corner and is highlighted with an orange border.

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.



The screenshot shows the same "Private Information" form as in Step 4. The "Edit" button is no longer present. A "Cancel" button is now in the top right corner. At the bottom of the form, a large blue button labeled "Save changes" is highlighted with an orange border.

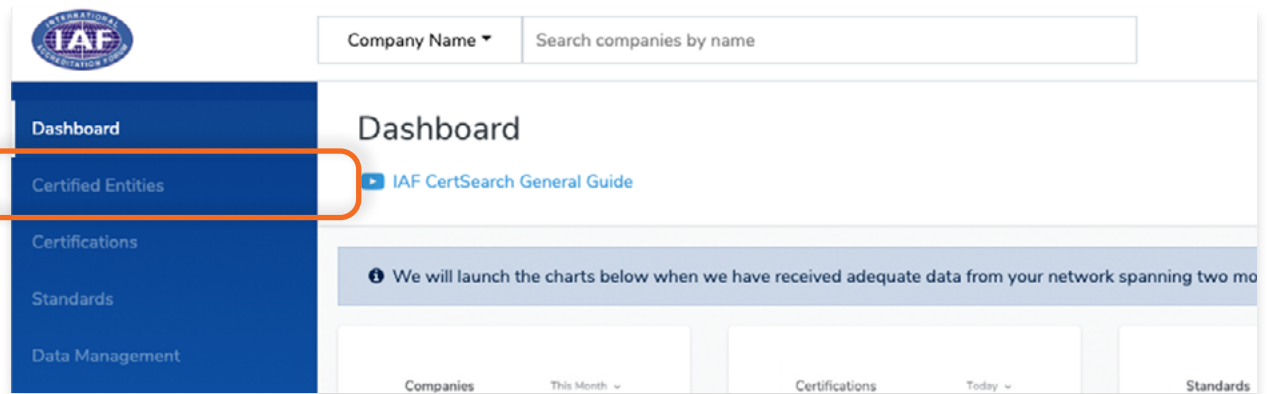


3.4 How to Add Certified Entities Manually

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

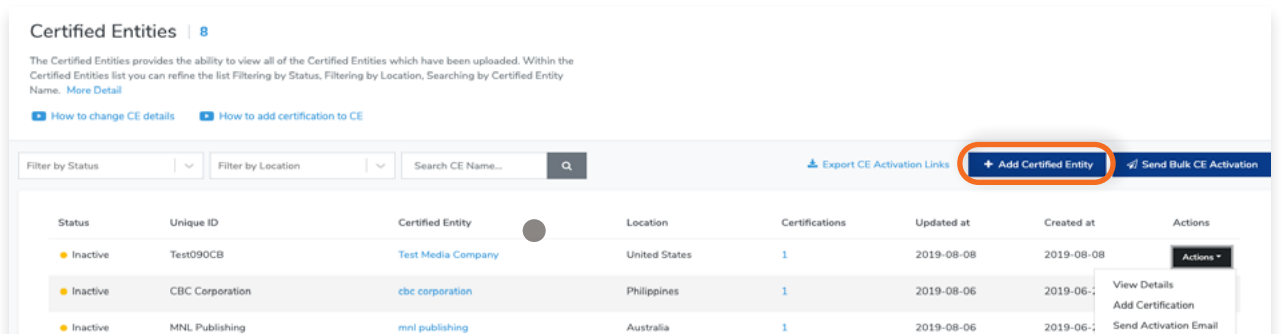
Step 1

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).

Company Logo

Company Logo Maximum size allowed is 500kb of PNG and JPG

Company Location

Economy/Country

Address

Company Information

Company Name

Company Trading Name

Company English Name

Private Information

Unique ID

Company Email

Key Contact Name

Company Website

Certification Information

Certification Number

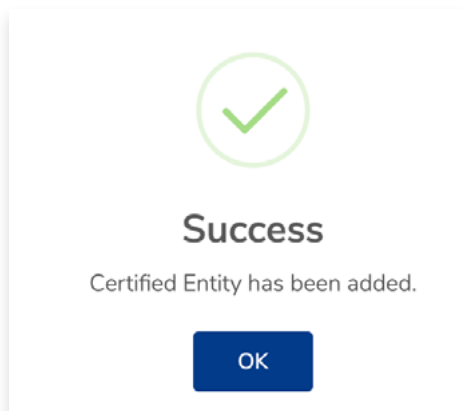
Accreditation Body

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](#)

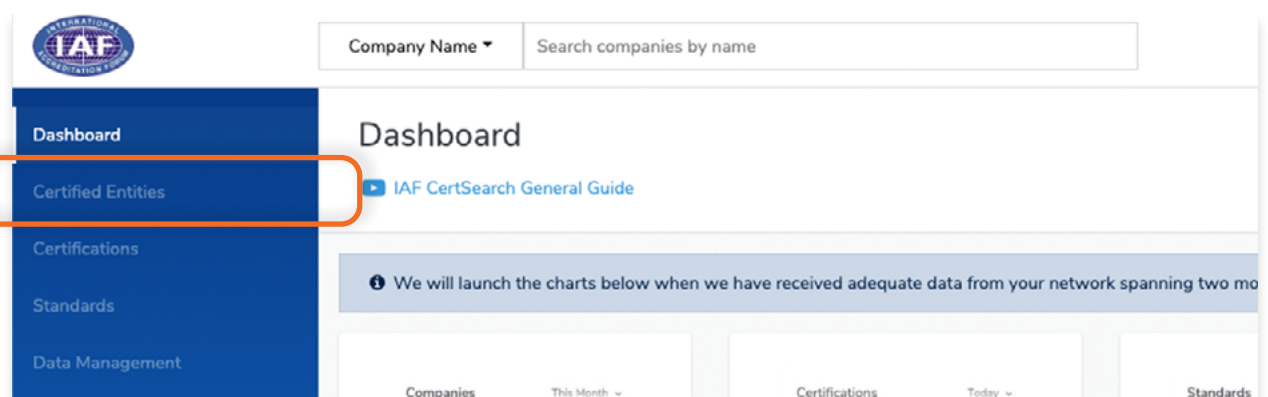
3.5.1 How to Send an Activation Email to a Single Certified Entity

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

https://youtu.be/l_yhMC4H1tA

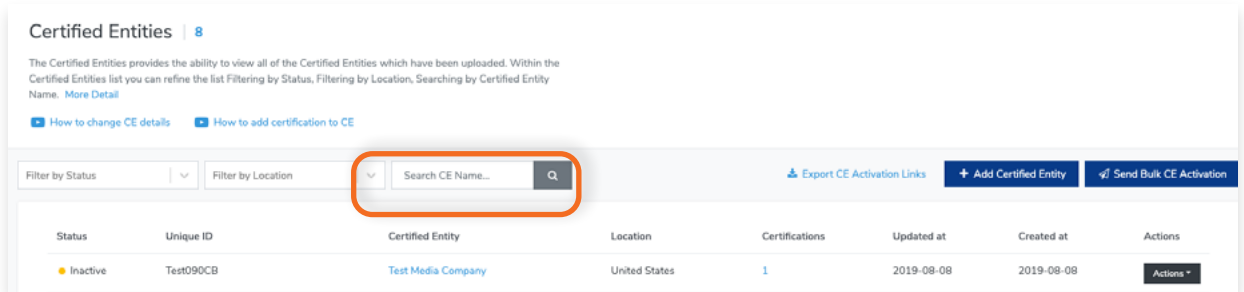
Step 1

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



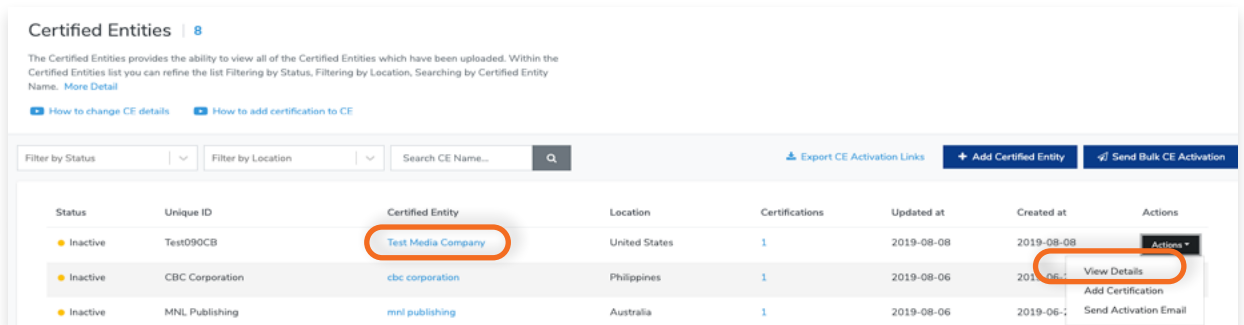
Step 2

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



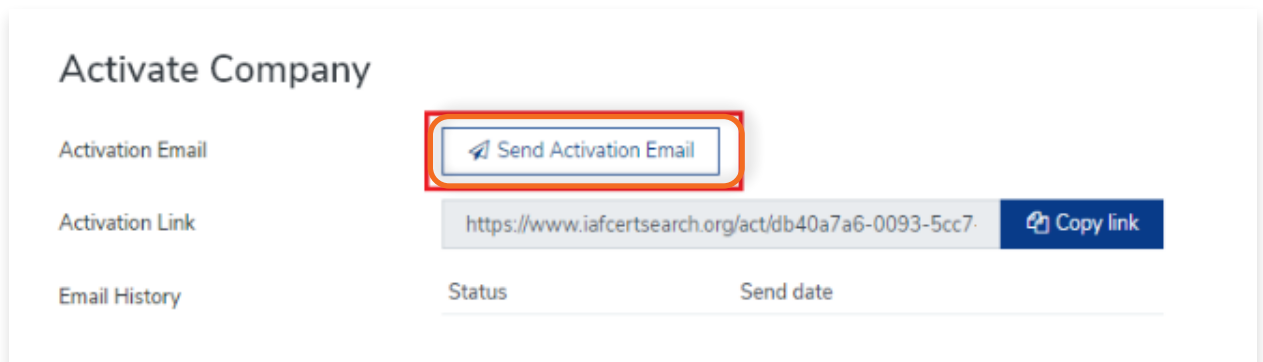
Step 3

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



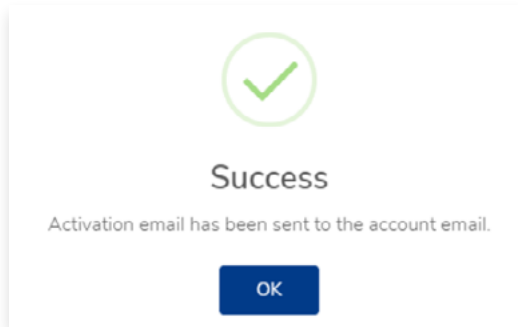
Step 4

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.

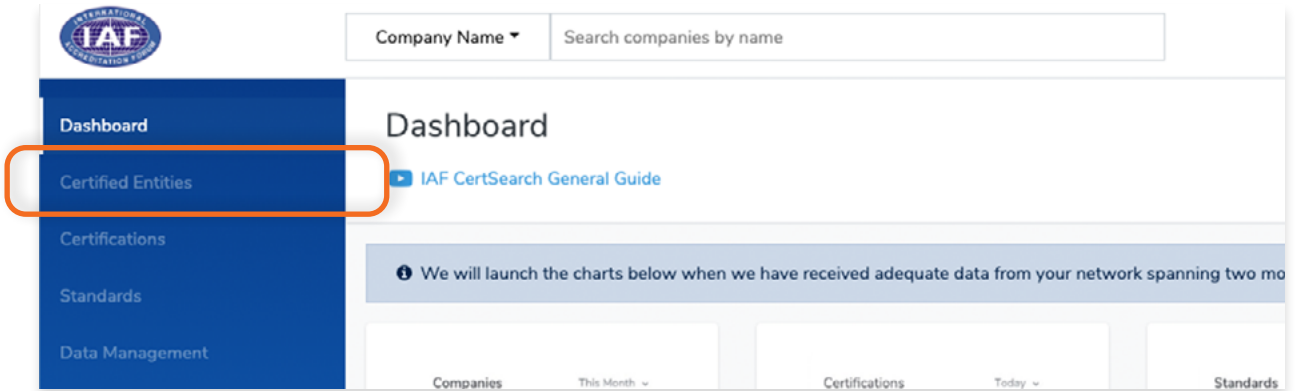
Activation Email	Send Activation Email				
Activation Link	https://www.iafcertsearch.org/act/db40a7a6-0093-5cc7- Copy link				
Email History	<table><thead><tr><th>Status</th><th>Send date</th></tr></thead><tbody><tr><td>Sent Activation Email</td><td>2019-09-12 10:52:02</td></tr></tbody></table>	Status	Send date	Sent Activation Email	2019-09-12 10:52:02
	Status	Send date			
Sent Activation Email	2019-09-12 10:52:02				

3.5.2 How to Send Bulk Activation Invitation Email

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

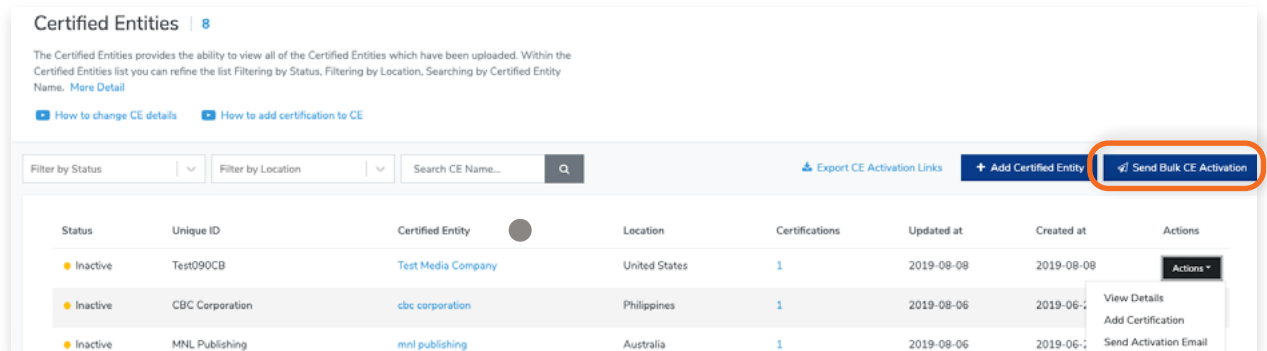
Step 1

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



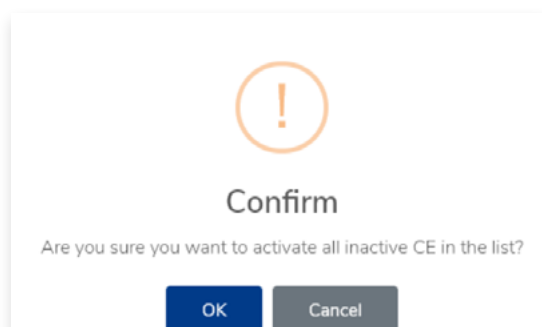
Step 2

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.



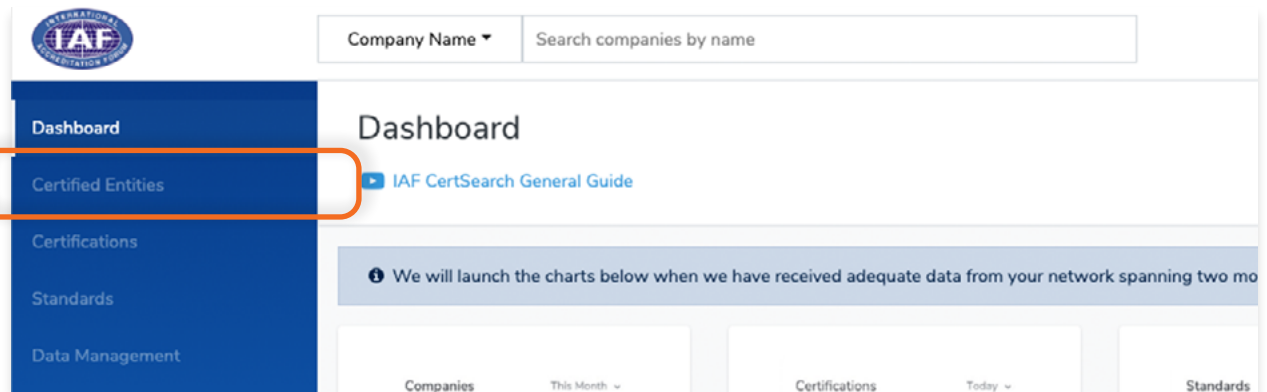
3.6 How to Generate Activation Link for One Single Certified Entity

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

https://youtu.be/I_yhMC4H1tA

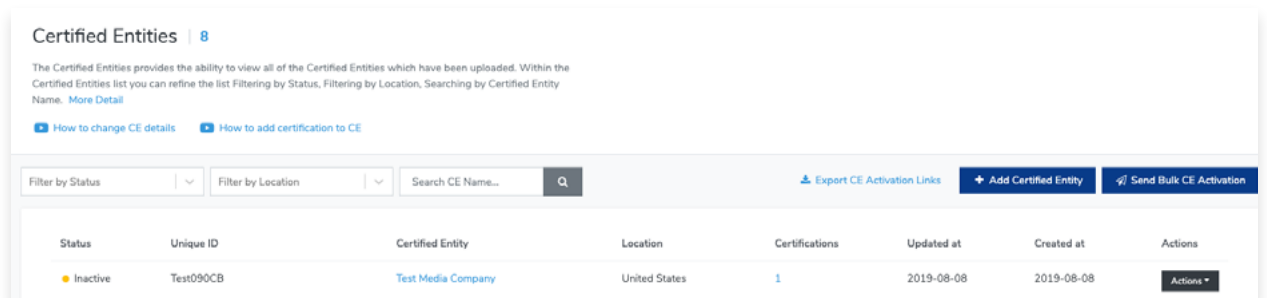
Step 1

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



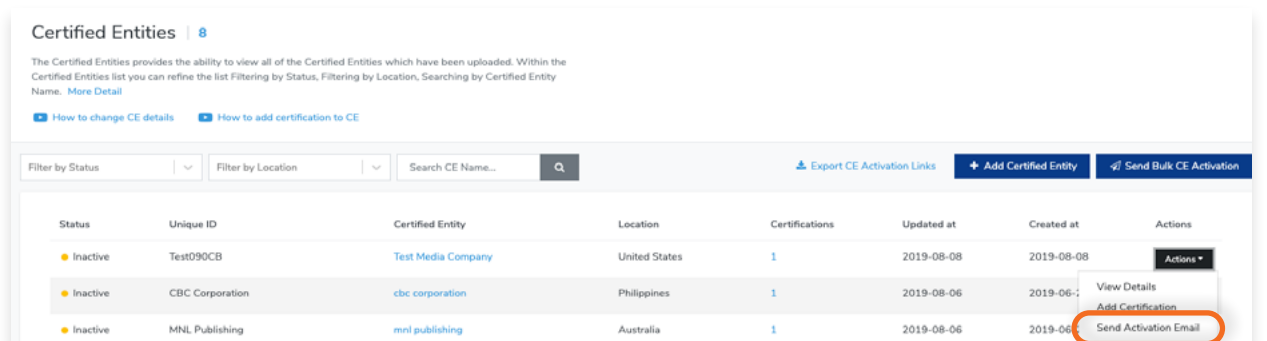
Step 2

Find the Certified Entity you wish to activate.



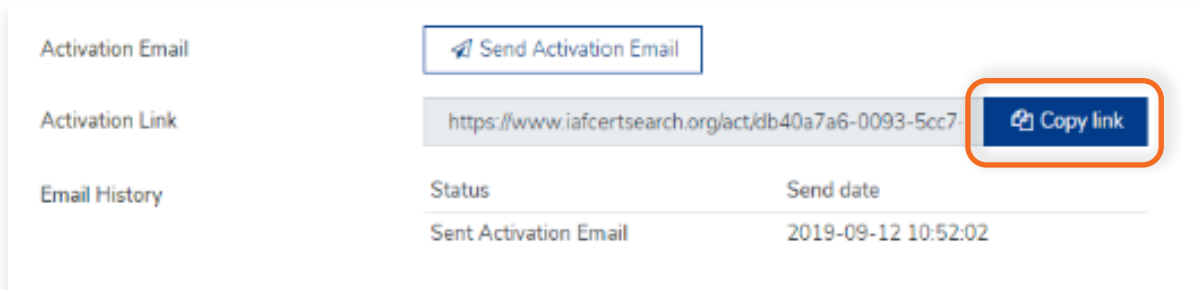
Step 3

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



3.6 How to Generate Activation Link for One Single Certified Entity

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.



The screenshot shows a user interface for generating an activation link. It includes a 'Send Activation Email' button, an 'Activation Link' field containing a URL, and a 'Copy link' button highlighted with a red box. Below this is an 'Email History' table.

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



3.6.1 How to Export Activation Links for All Certified Entities

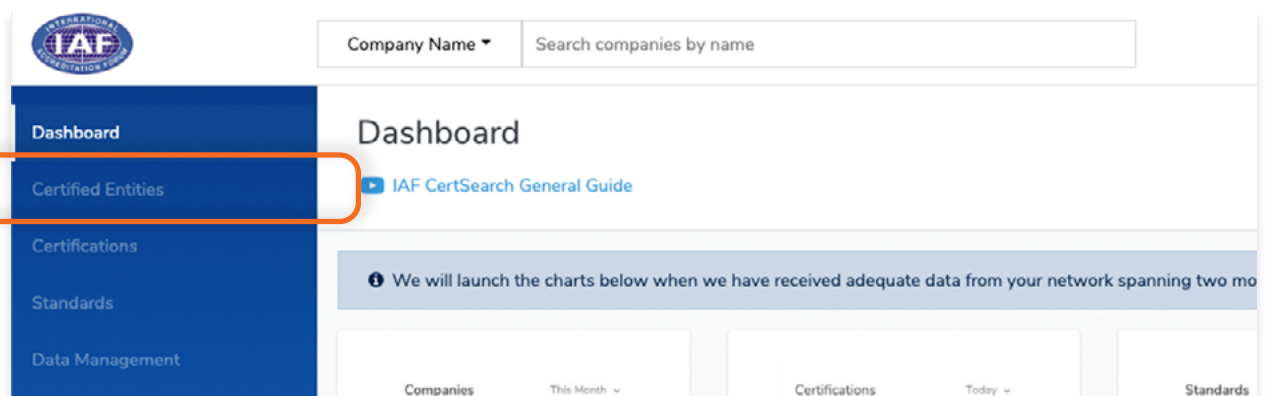
View the step by step guide below or watch the video guide here:

<https://youtu.be/BeRQKk39mFM>

You can export a list of your inactive Certified Entities and their unique Activation Link.

Step 1

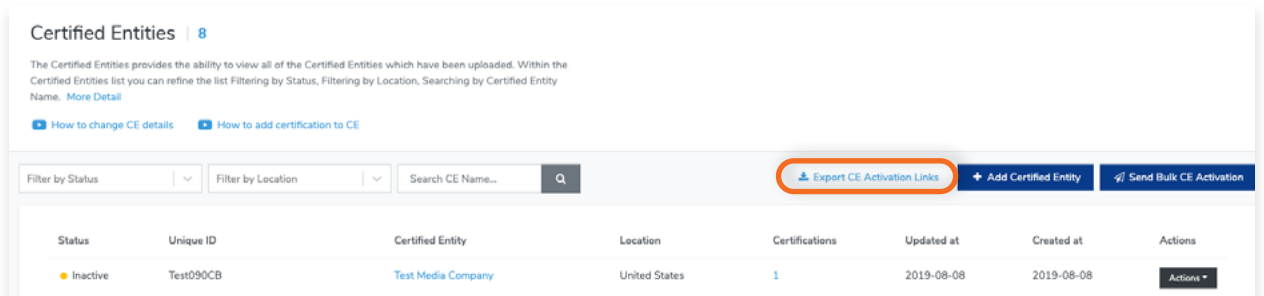
From the Dashboard, click **Certified Entities** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with 'Certified Entities' highlighted by a red box. The main content area shows the dashboard title and a search bar for companies. A notification banner at the bottom indicates that charts will be launched when adequate data is received.

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.

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

Step 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



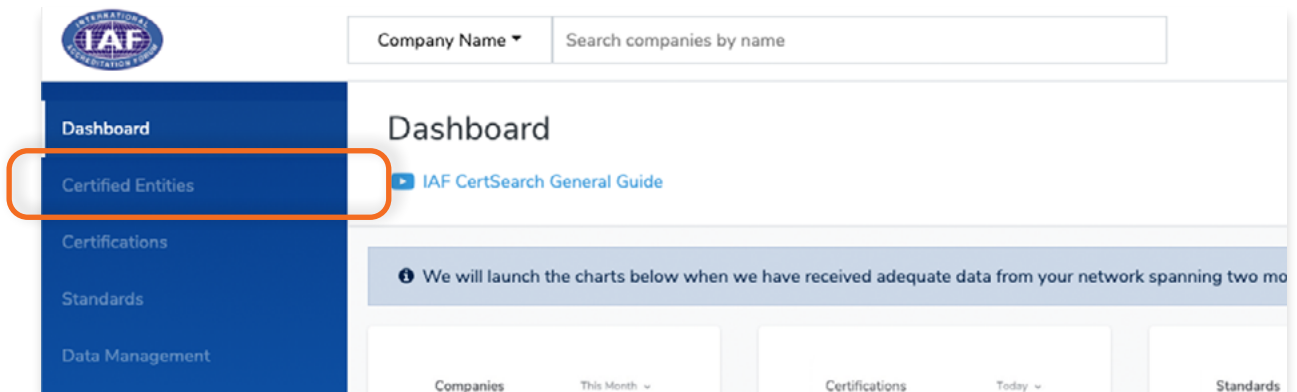
3.7 How to Edit Certification Details of a Certified Entity

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

<https://youtu.be/ijfEH0LujtU>

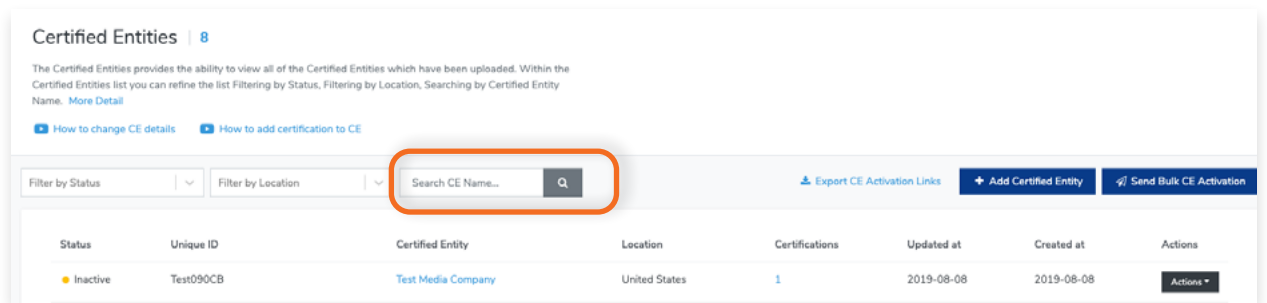
Step 1

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



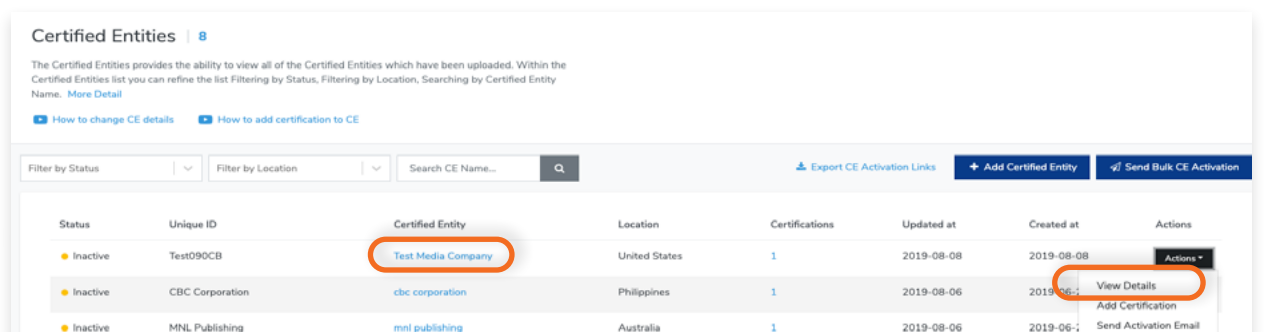
Step 2

Find the Certified Entity you wish to edit.



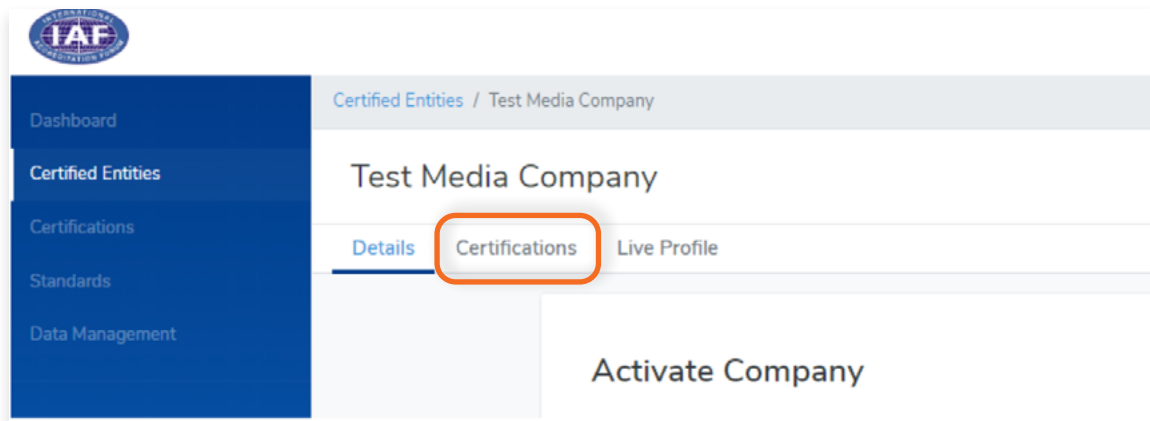
Step 3

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



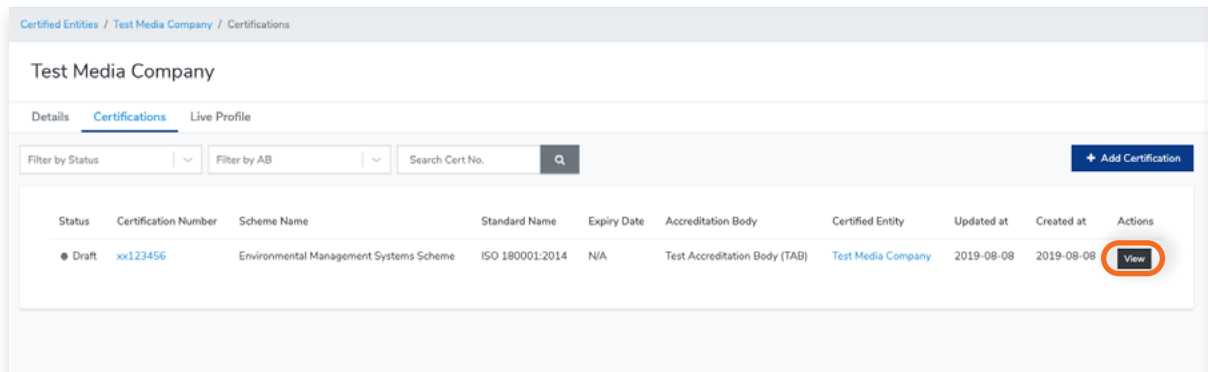
Step 4

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



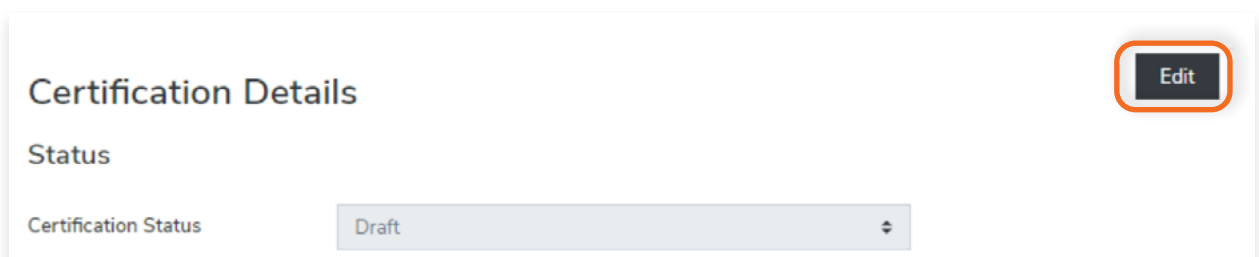
Step 5

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.

Certification Details

Cancel

Status

Certification Status

Public Information

The certification information will appear on the profile page.

Accreditation Body

Standard

Certificate Number

Scope Description

Private Information

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

Issued Date

Expiry Date

Original Issued Date

Submit

Step 8

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



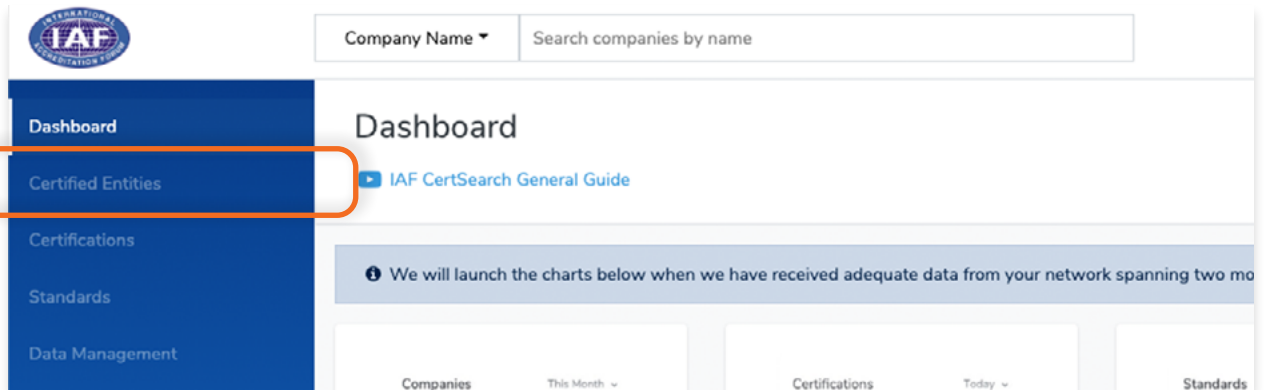
3.8 How to Add Certification to a Certified Entity

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

<https://youtu.be/DYqNoXVuAlk>

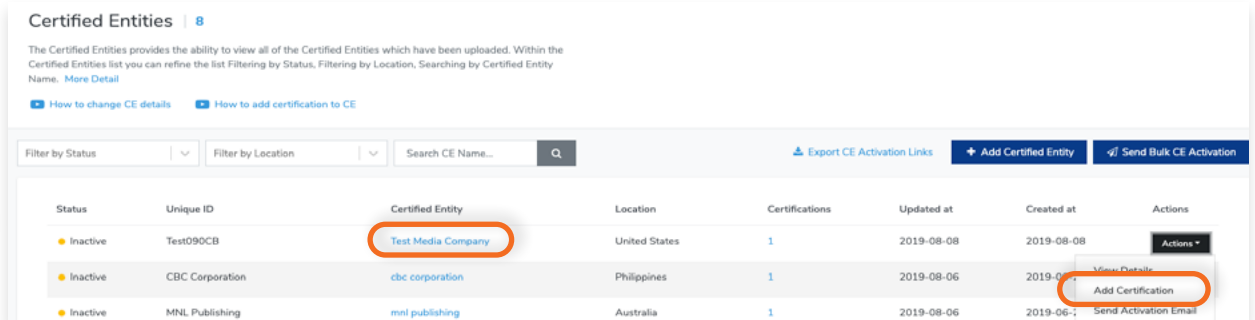
Step 1

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



Step 2

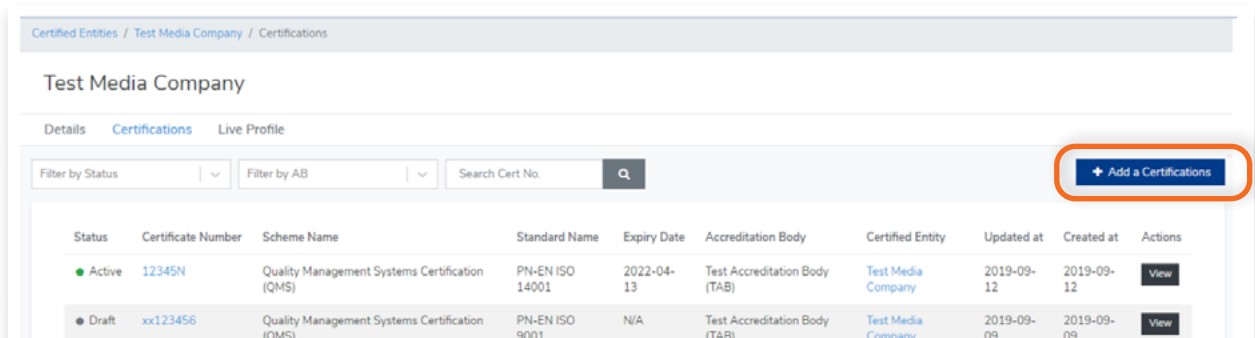
Find the Certified Entity you wish to add a Certification to, then click **Action** and select **Add Certification**. *



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.

The screenshot shows a web interface for creating a certification for the entity 'reliable logistics services inc.'. The breadcrumb trail at the top reads 'Certified Entities / reliable logistics services... / Certifications / Create a Certifications'. Below the entity name, there are three tabs: 'Details', 'Certifications', and 'Live Profile'. The 'Certifications' tab is active. The form is divided into three sections: 'Status', 'Public Information', and 'Private Information'.
- **Status:** A dropdown menu for 'Certification Status' is set to 'Active'.
- **Public Information:** A note states 'The certification information will appear on the profile page.' Below this are four input fields: 'Accreditation Body' (with a dropdown arrow), 'Standard' (with a dropdown arrow), 'Certificate Number', and 'Scope Description' (a larger text area).
- **Private Information:** A note states 'Issued Date, Expiry Date and Original Issued Date will be private.' Below this are three date input fields: 'Issued Date', 'Expiry Date', and 'Original Issued Date', each with a placeholder 'YYYY-MM-DD'.

Step 8

Click **Submit** to add Certification.



4. Certifications

4.1 Where Can I View All Certifications Uploaded

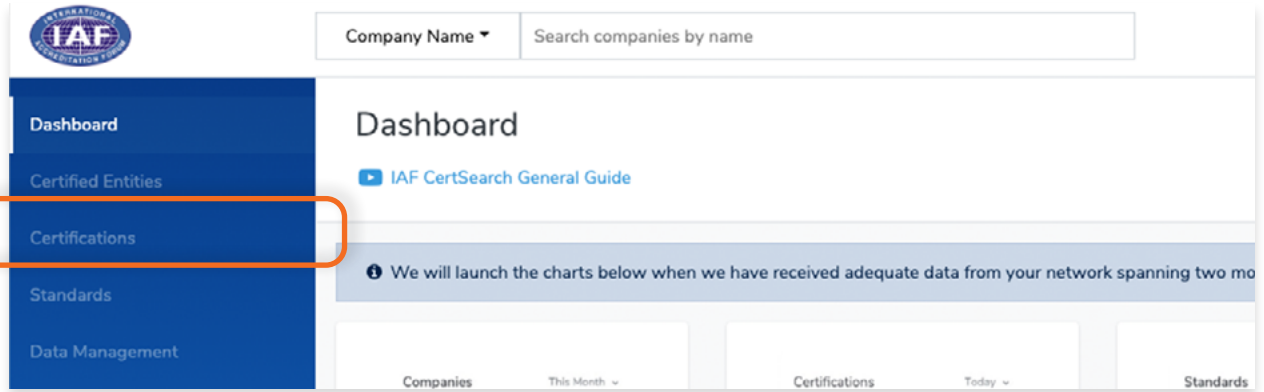
View the step by step guide below or watch the video guide here:

<https://youtu.be/4ybJMYRj9JA>

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

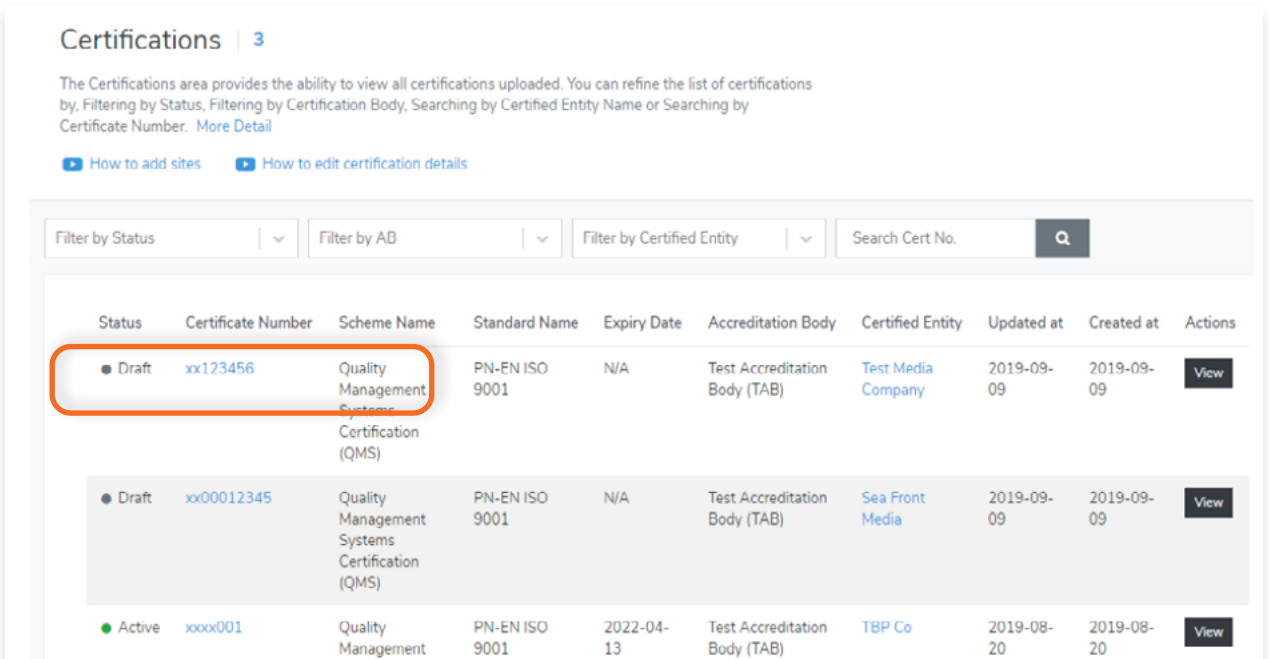
Step 1

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.



Certifications | 3

The Certifications area provides the ability to view all certifications uploaded. You can refine the list of certifications by, Filtering by Status, Filtering by Certification Body, Searching by Certified Entity Name or Searching by Certificate Number. [More Detail](#)

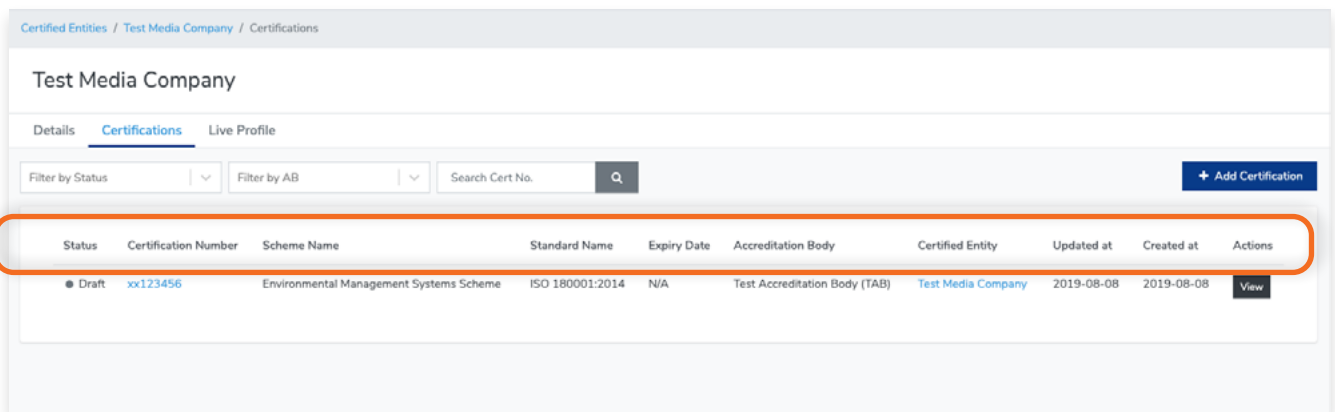
[How to add sites](#) [How to edit certification details](#)

Status	Certificate Number	Scheme Name	Standard Name	Expiry Date	Accreditation Body	Certified Entity	Updated at	Created at	Actions
<input checked="" type="radio"/> Draft	xx123456	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Test Media Company	2019-09-09	2019-09-09	View
<input checked="" type="radio"/> Draft	xx00012345	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Sea Front Media	2019-09-09	2019-09-09	View
<input checked="" type="radio"/> Active	xxxx001	Quality Management	PN-EN ISO 9001	2022-04-13	Test Accreditation Body (TAB)	TBP Co	2019-08-20	2019-08-20	View

4.1 Where can I view all Certifications uploaded

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



The screenshot shows a web interface for 'Test Media Company' with a 'Certifications' tab selected. The page includes a search bar and a table of certification records. The table has the following columns: Status, Certification Number, Scheme Name, Standard Name, Expiry Date, Accreditation Body, Certified Entity, Updated at, Created at, and Actions. A single record is visible with a status of 'Draft' and a 'View' button.

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

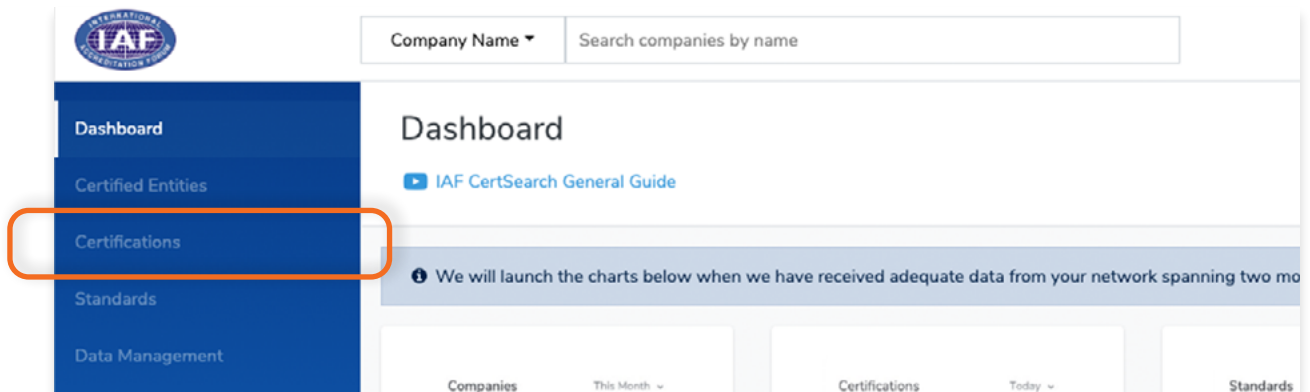
4.2 How to Edit Certification Details

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**.

Certifications | 3

The Certifications area provides the ability to view all certifications uploaded. You can refine the list of certifications by, Filtering by Status, Filtering by Certification Body, Searching by Certified Entity Name or Searching by Certificate Number. [More Detail](#)

[How to add sites](#) [How to edit certification details](#)

Filter by Status | Filter by AB | Filter by Certified Entity | Search Cert No.

Status	Certificate Number	Scheme Name	Standard Name	Expiry Date	Accreditation Body	Certified Entity	Updated at	Created at	Actions
● Draft	xx123456	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Test Media Company	2019-09-09	2019-09-09	View
● Draft	xx00012345	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Sea Front Media	2019-09-09	2019-09-09	View
● Active	xxxx001	Quality Management	PN-EN ISO 9001	2022-04-13	Test Accreditation Body (TAB)	TBP Co	2019-08-20	2019-08-20	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.

Certifications | 3

The Certifications area provides the ability to view all certifications uploaded. You can refine the list of certifications by, [Filtering by Status](#), [Filtering by Certification Body](#), [Searching by Certified Entity Name](#) or [Searching by Certificate Number](#). [More Detail](#)

[How to add sites](#) [How to edit certification details](#)

Status	Certificate Number	Scheme Name	Standard Name	Expiry Date	Accreditation Body	Certified Entity	Updated at	Created at	Actions
● Draft	xx123456	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Test Media Company	2019-09-09	2019-09-09	<input type="button" value="View"/>
● Draft	xx00012345	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	N/A	Test Accreditation Body (TAB)	Sea Front Media	2019-09-09	2019-09-09	<input type="button" value="View"/>
● Active	xxxx001	Quality Management Systems Certification (QMS)	PN-EN ISO 9001	2022-04-13	Test Accreditation Body (TAB)	TBP Co	2019-08-20	2019-08-20	<input type="button" value="View"/>

Step 8

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



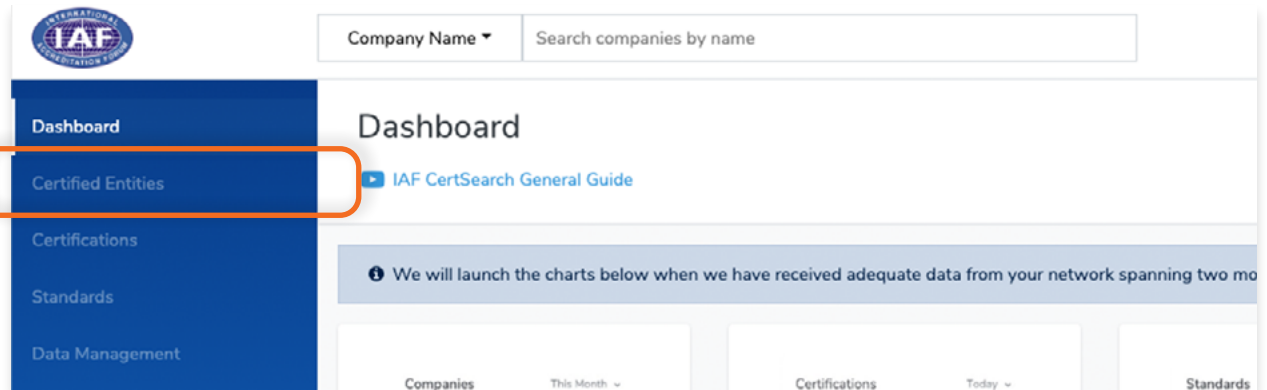
4.3 How to add a Certification to a Certified Entity

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

<https://youtu.be/DYqNoXVuAlk>

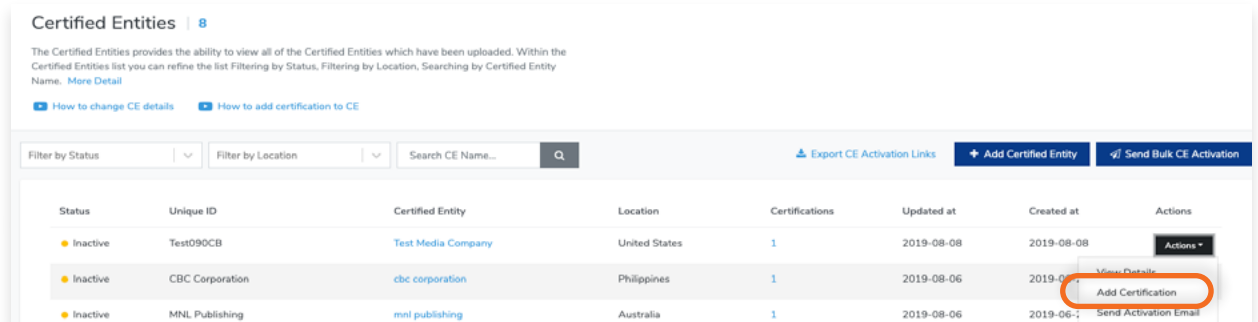
Step 1

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



Step 2

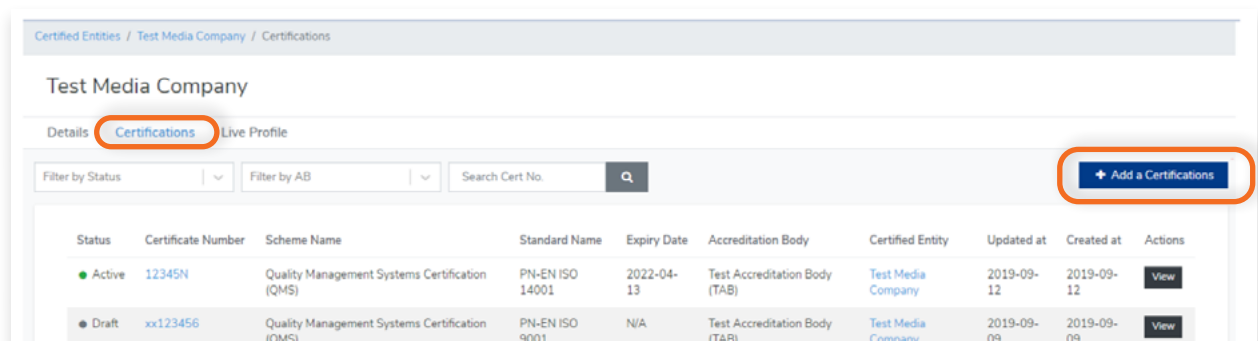
Find the Certified Entity you wish to add a Certification to, then click **Action** and select **Add Certification**. *



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.

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

reliable logistics services inc.

Details Certifications Live Profile

Status

Certification Status

Public Information

The certification information will appear on the profile page.

Accreditation Body

Standard

Certificate Number

Scope Description

Private Information

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

Issued Date

Expiry Date

Original Issued Date

Step 8

Click **Submit** to add Certification.



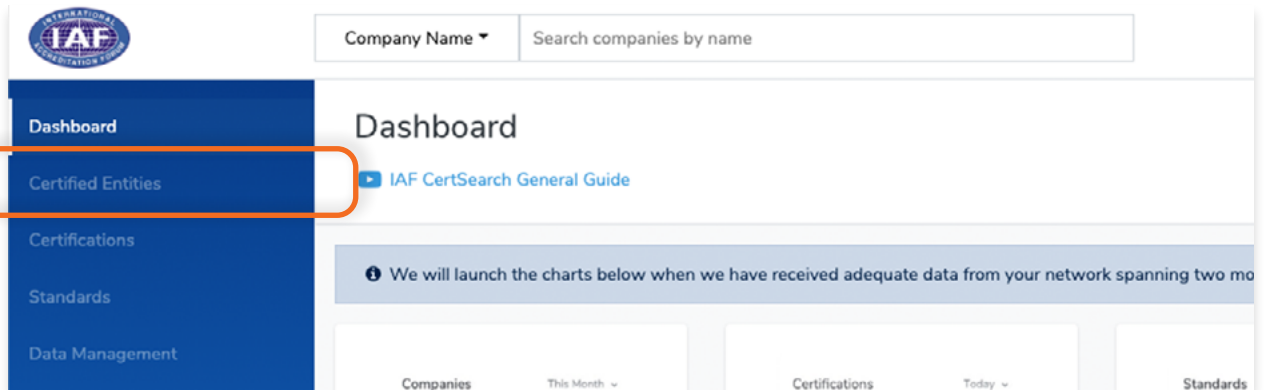
4.4 How to Add a Site Location to a Certification

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

<https://youtu.be/DYqNoXVuAlk>

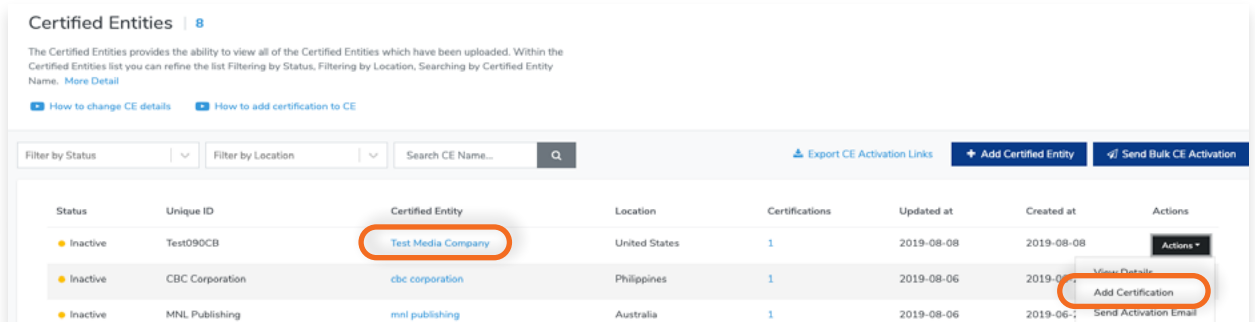
Step 1

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



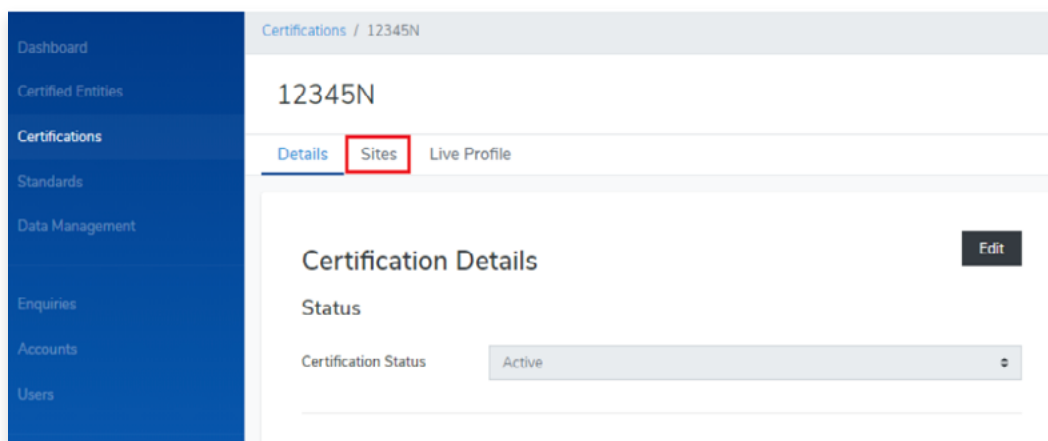
Step 2

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



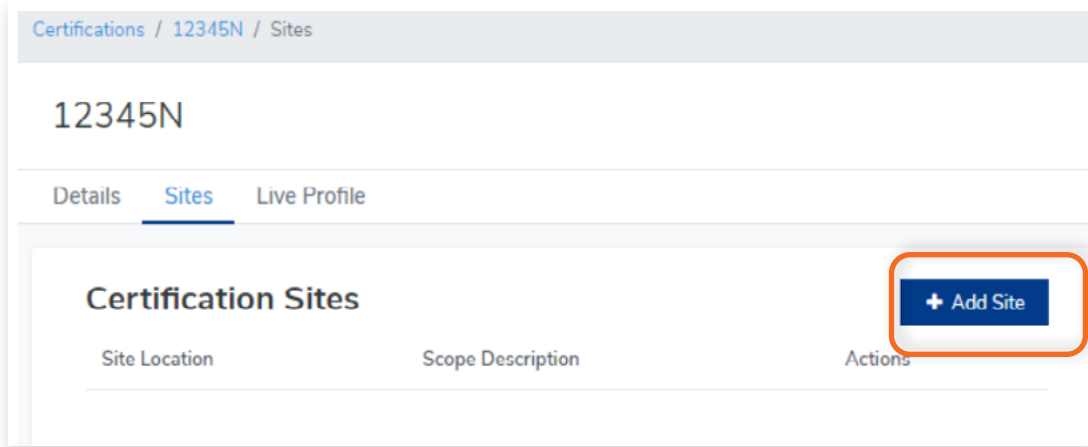
Step 3

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:

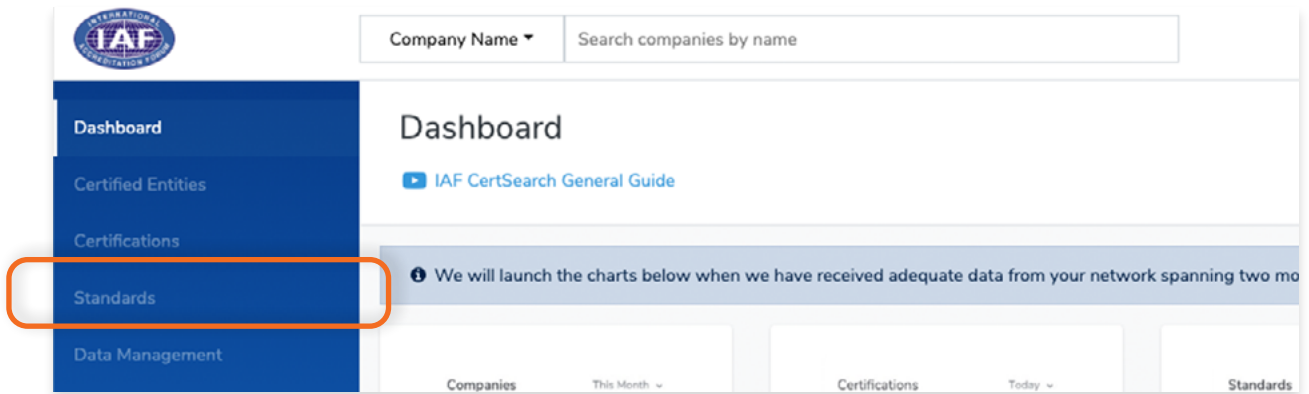
<https://youtu.be/nEZfQer5KTA>

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

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

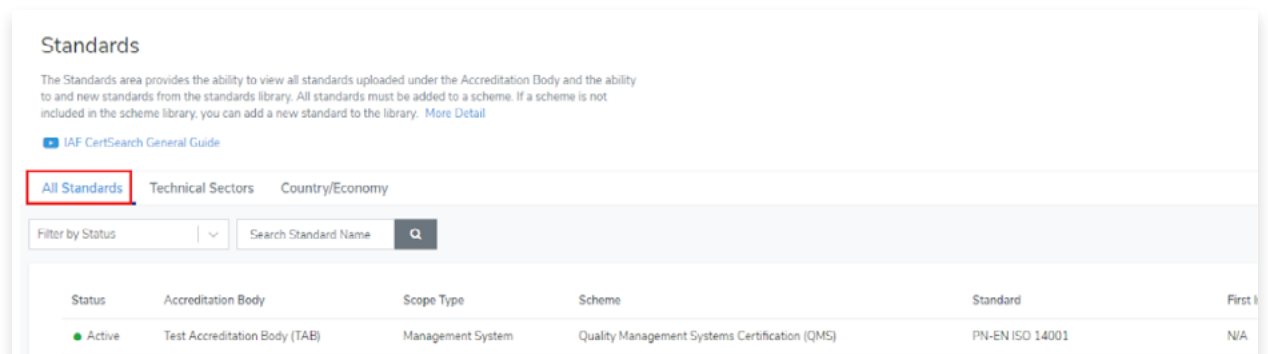
Step 1

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:

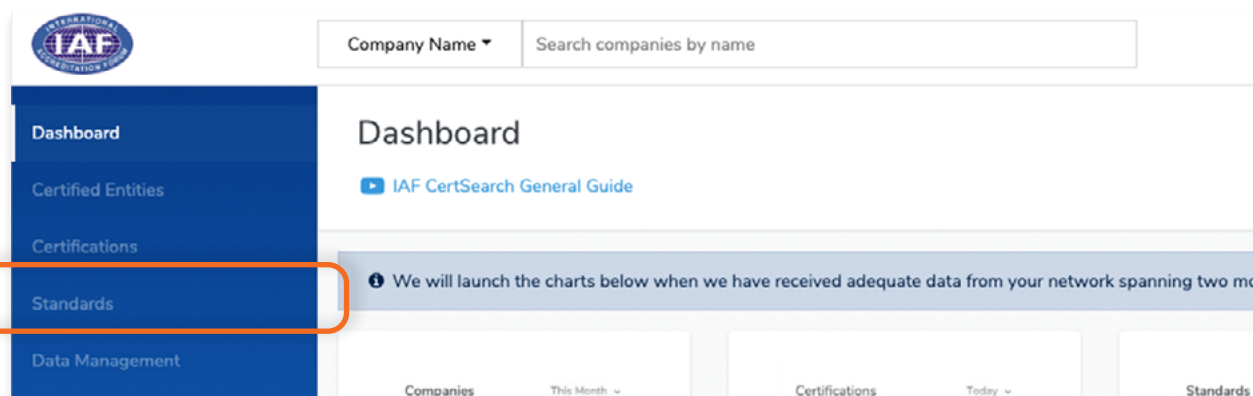
<https://youtu.be/VY-9RjBkTM4>



5.2 How to View Technical Sectors

Step 1

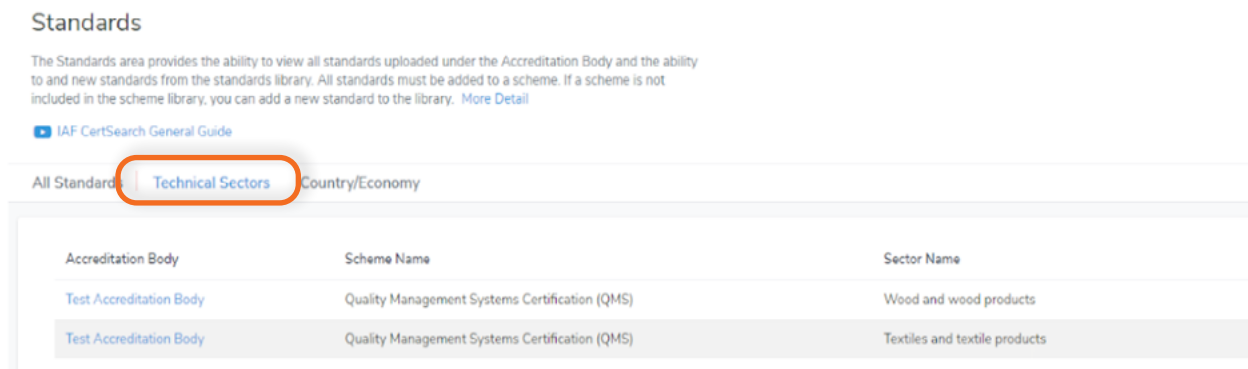
From the Dashboard, click **Standards** in the left hand navigation.



Step 2

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

View the technical sectors which have been assigned by your Accreditation Bodies.



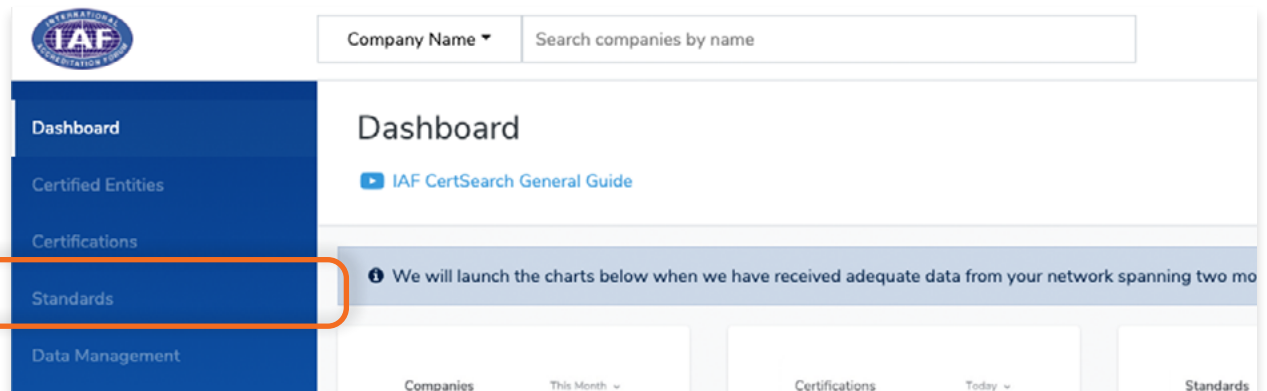
If there is a missing technical sector in your database, contact your Accreditation Body. They will be able to add the technical sectors for you. The Technical Sectors will also be displayed on the Certification Body



5.3 How to View Country/Economy

Step 1

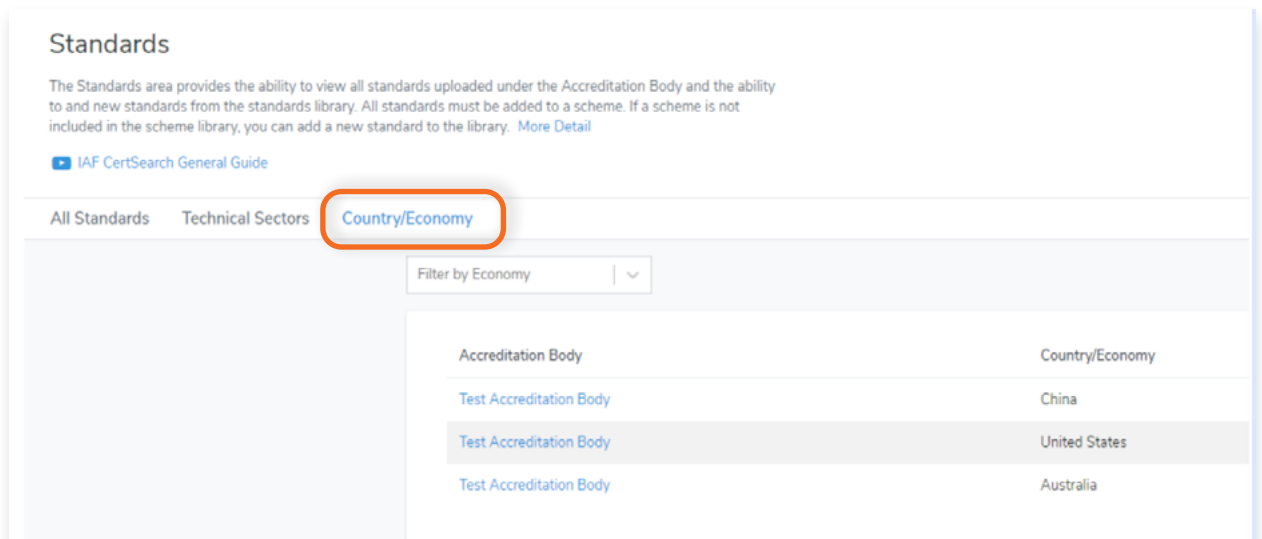
From the Dashboard, click **Standards** in the left hand navigation.



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

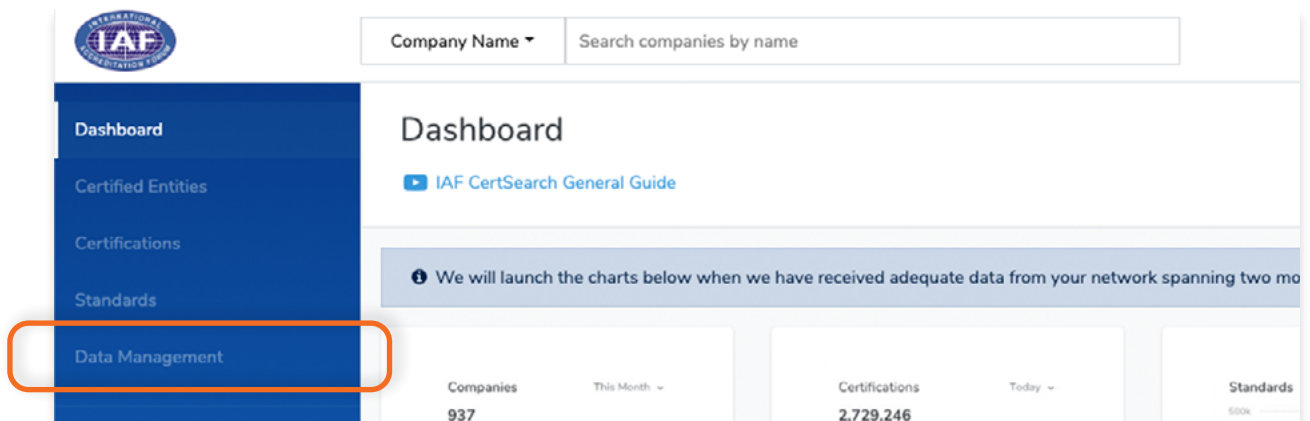
6.1 Overview of Data Management

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

<https://youtu.be/d2quRw6yYeY>

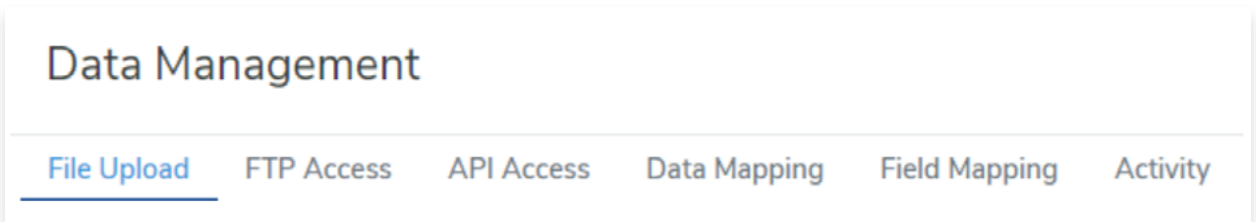
From the Dashboard, click **Data Management** in the left hand navigation.

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

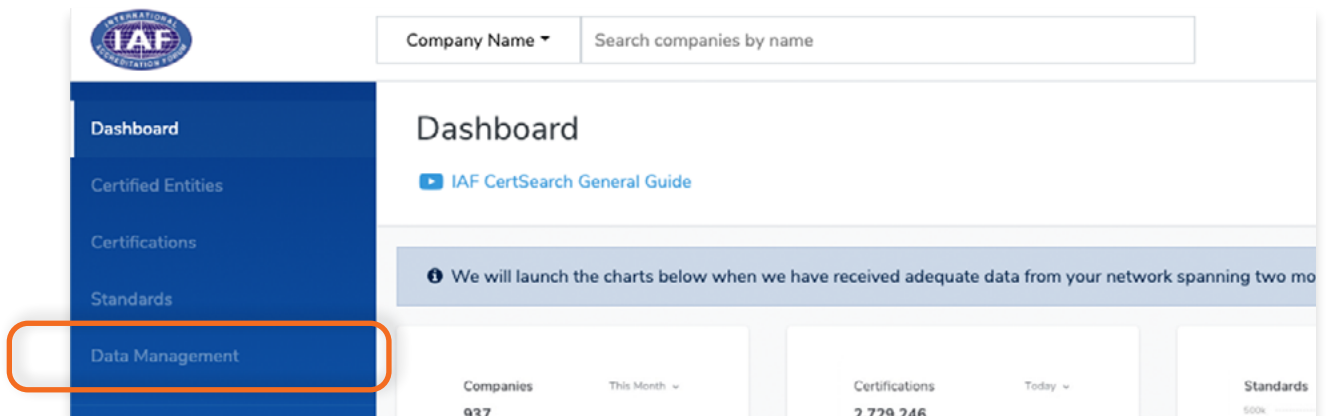
View the step by step guide below or watch the video guide here:

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.

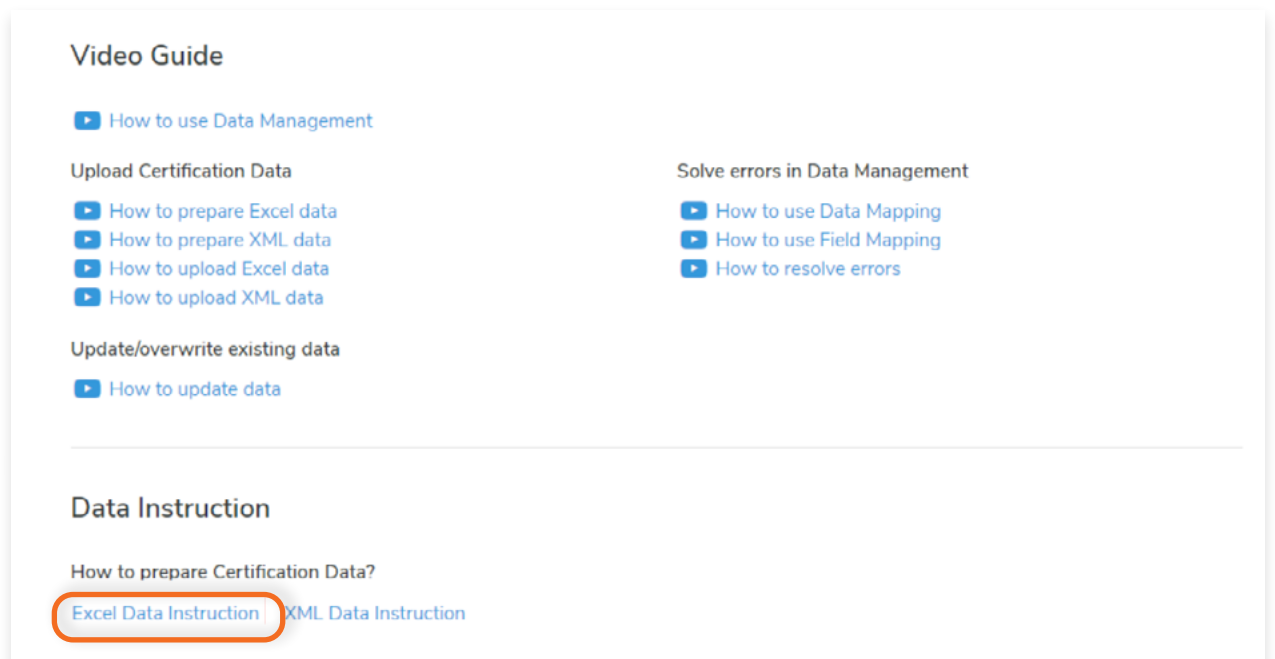
Step 1

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.

	A	B	C	D	E
1		Certification Identity Number	Certificate Number	Certification Status	Accreditation Status
2	Glossary	Mandatory Field provided by the CB for internal use of IAF CertSearch. "Certification Identity Number" is a unique identification for the Certificate. The "Certification Identity Number" makes it possible to identify which Certifications are in the CB network what data in the register belongs to the Certification. When the CB uploads additional data in the future (certification data i.e. status) the system will look up the "Certification Identity Number" to maintain integrity of data. The "Certification Identity Number" can be any alpha numeric number.	Certificate number shown on the certificate itself	Include the terms that the CB uses to define the status of the certification. Commonly used terms are: Active, Withdrawn, Suspended, Cancelled or Hidden	Has this certificate been issued under and existing accreditation or is this an unaccredited certificate. Enter either Accredited or Unaccredited
3					
4	Mandatory Status	Mandatory	Mandatory	Mandatory	Mandatory
5					
6	Correct Example	AXB1234	20897-A01	Active	Accredited
7		1234AJT	20897-A02	Withdrawn	Accredited
8		FJR-1012A	20897-B01	Suspended	Unaccredited
9					
10	Do's	Ensure the Certification Identity Number is Unique	Ensure the Certificate Number is in TEXT format in excel	Apply one of the following status values: Active, Withdrawn, Suspended, Cancelled, or Hidden are used in this cell	Ensure that only the following statuses: Accredited or Unaccredited are used in this cell
11		Ensure the Certification Identity Number is the same in each tab for the Certification. If it's not the same the data in the other tabs will not be matched.			
12		Ensure that every unique Certification Identity Number in other tabs in its exact format (a mismatch in spaces, capitalization, and others formats will cause an error and data will not be matched).			
13		Ensure that the Certification Body identity number is in TEXT format in excel			
14					
15	Don't's	Don't use the sample example "UNIQUED-CERT01" create your own	Don't merge multiple Certificate Numbers in one cell. Ensure that each cell contains only 1 Certificate Number	Don't use other Certification Status besides the given options (Active, Withdrawn, Suspended, Cancelled, or Hidden)	Don't use other Accreditation Status besides the given options (Accredited or Unaccredited)
16		Don't leave the Certification Identity Number cell blank.	Don't leave the Certificate Number cell blank.	Don't merge 2 or more Certification Status in one cell	Don't merge 2 or more Accreditation Status in one cell
17		Don't merge multiple Certification Identity Numbers in one cell. Ensure that each cell is containing only 1 Certification Identity Number to correspond to 1 Certificate		Don't leave the Certification Status cell blank	Don't leave the Accreditation Status cell blank
18		Don't use 1 Certification Identity Number for multiple Certifications			

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 Data?

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

Download Data Templates

Upload Certification

↓ Excel Template

↓ XML Template

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

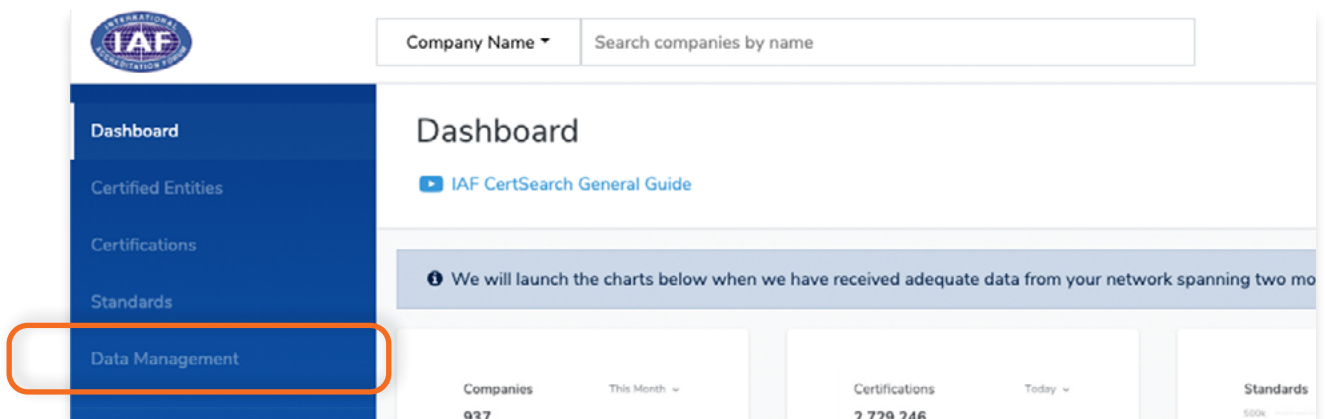


6.3 How to Download and Populate Certification Data Template in Excel

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

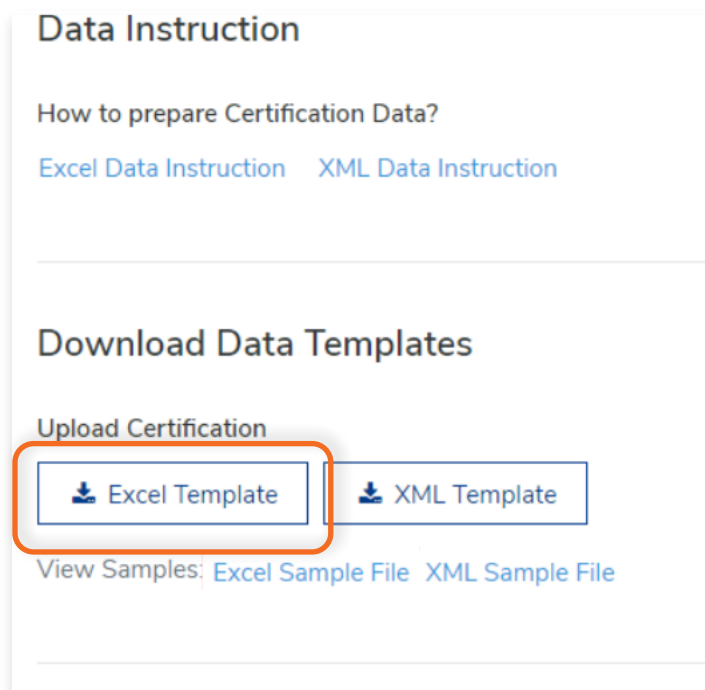
Step 1

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.

B	C	D	E	
CE for internal use of IAF CertSearch. This unique identification for the Certificate " makes it possible to identify which work what data in the register belongs to loads additional data in the future system will look up the "Certification Identity of data. The "Certification Identity number.	Certificate Number Certificate number shown on the certificate itself	Certification Status Include the terms that the CE uses to define the status of the certification. Commonly used terms are: Active, Withdrawn, Suspended, Cancelled or Hidden	Accreditation Status Has this certificate been issued under and existing accreditation or is this an unaccredited certificate. Enter either Accredited or Unaccredited	Certification Identity Number Please indicate the Certification Identity Number
	Mandatory	Mandatory	Mandatory	Mandatory
81234</certificate_identity_number>	<certificate_number>20097-A01</certificate_number>	<certification_status>Active</certification_status>	<accreditation_status>Accredited </accreditation_status>	<certification_identity_number>81234</certification_identity_number>
AAJT</certificate_identity_number>	<certificate_number>20097-A02</certificate_number>	<certification_status>Withdrawn</certification_status>	<accreditation_status>Accredited </accreditation_status>	<certification_identity_number>AAJT</certification_identity_number>
-1012A</certificate_identity_number>	<certificate_number>20097-B01</certificate_number>	<certification_status>Suspended</certification_status>	<accreditation_status>Unaccredited </accreditation_status>	<certification_identity_number>-1012A</certification_identity_number>
Each Certification Identity Number is Unique		Apply one of the following status values: Active, Withdrawn, Suspended, Cancelled, or Hidden are used in this xml element	Ensure that only the following status : Accredited or Unaccredited are used in this xml element	Use "Management" for Certification Identity Numbers
Each Certification Identity Number is the same in each xml element. If the data are not matched, (as in the example above), and others will cause an error and				
UNIQUEID-CERT01" create your own	Don't merge multiple Certificate Numbers in one xml element. Ensure that each xml element contains only 1 Certificate Number	Don't use other Certification Status besides the given options	Don't use other Accreditation Status besides the given options	Don't merge multiple Certification Identity Numbers in one xml element
Certificate Number xml element blank.	Don't leave the Certificate Number xml element blank.	Don't merge 2 or more Certification Status in one xml element	Don't merge 2 or more Accreditation Status in one xml element	Don't leave the Certification Identity Number xml element blank
Certificate Identity Numbers in one xml element contains only 1 Certification Identity Number		Don't leave the Certification Status xml element blank	Don't leave the Accreditation Status xml element blank	
UNIQUEID-CERT01" create your own	<certificate_number>60119-A02, 60119-A03</certificate_number> [Don't enter two Certificate Numbers in one xml element]	<certification_status>Not Applicable</certification_status> [this status is not available in the options]	<accreditation_status>Valid</accreditation_status> [this status is not available in the options]	<certification_identity_number>UNIQUEID-CERT01</certification_identity_number> [Don't enter the Certification Identity Number for multiple Certifications]
UNIQUEID-CERT02, UNIQUEID-CERT03" create your own	<certificate_number></certificate_number> [Don't leave the xml element blank]	<certification_status></certification_status> [Don't leave the xml element blank]	<accreditation_status>Accredited, Unaccredited </accreditation_status> [these two status options are used in 1 xml element]	<certification_identity_number>UNIQUEID-CERT02, UNIQUEID-CERT03</certification_identity_number> [Don't leave the xml element blank]

Step 5

Save the File.



6.4 How to Prepare Certification Data Using XML

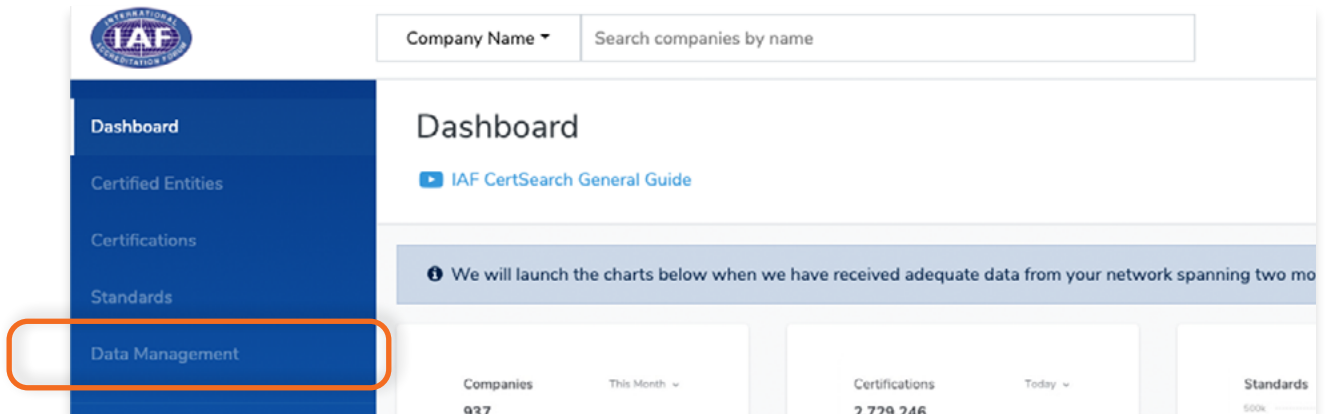
View the step by step guide below or watch the video guide here:

<https://youtu.be/Owr9tQ2EMWI>

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

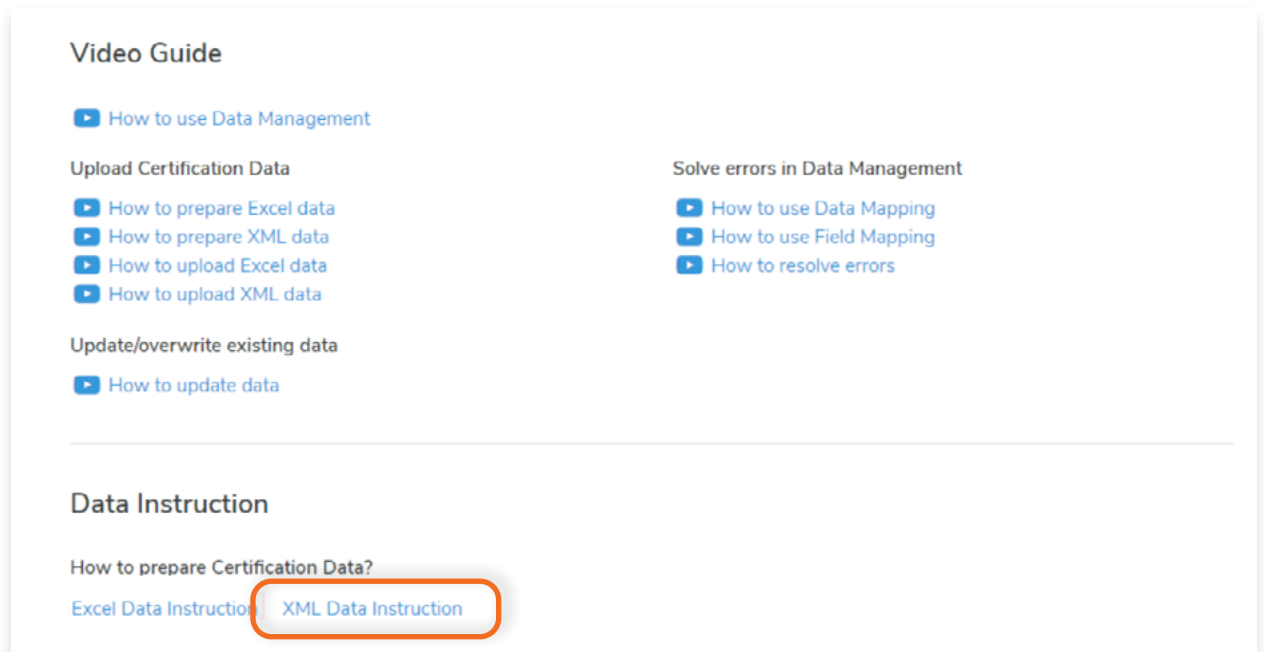
Step 1

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.

2					hydrogen, carbon
3	UNIQUEID-CERT02	60119-A01	Active	Accredited	measurements and sampling in
4				Management System	Design, Development,
5					Manufacture and Services of
6					Chemical Products, Detergent
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					

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.

Step 4

Click **Excel Template** under Download Data Templates

Download Data Templates

Upload Certification

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

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

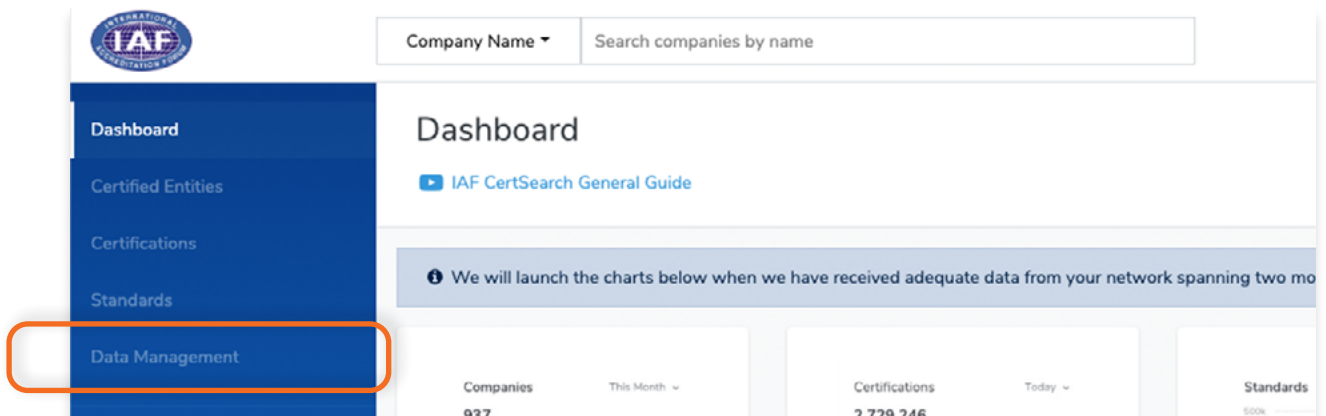


6.5 How to Download Certification Data Template in XML

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

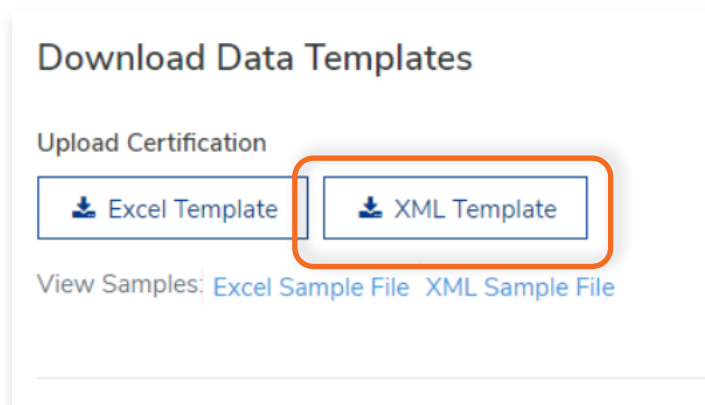
Step 1

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 <ul style="list-style-type: none">▶ How to prepare Excel data▶ How to prepare XML data▶ How to upload Excel data▶ How to upload XML data	Solve errors in Data Management <ul style="list-style-type: none">▶ How to use Data Mapping▶ How to use Field Mapping▶ How to resolve errors	Update/overwrite existing data <ul style="list-style-type: none">▶ 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](#)

Upload Data

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

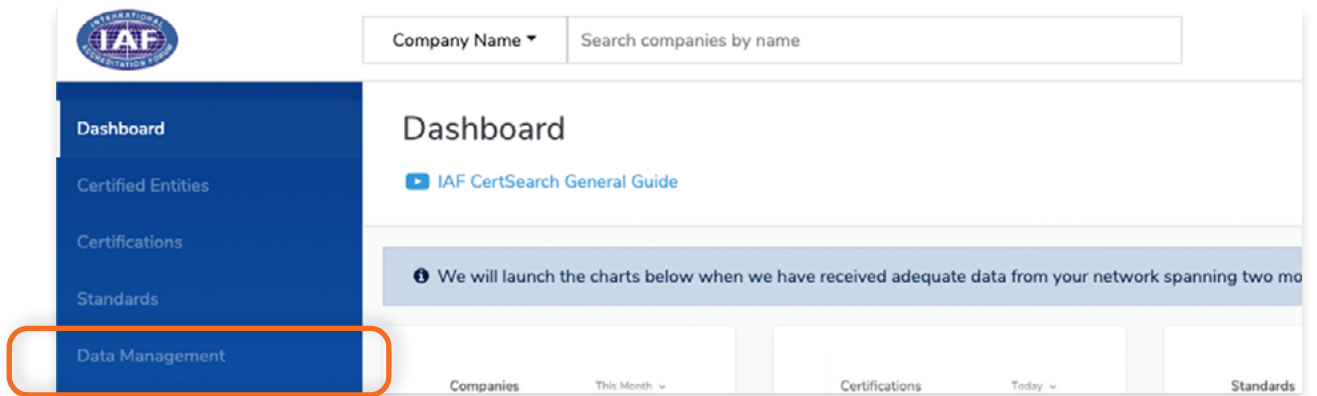
[Upload Certifications](#)

6.6.1 File Upload Video Guides

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

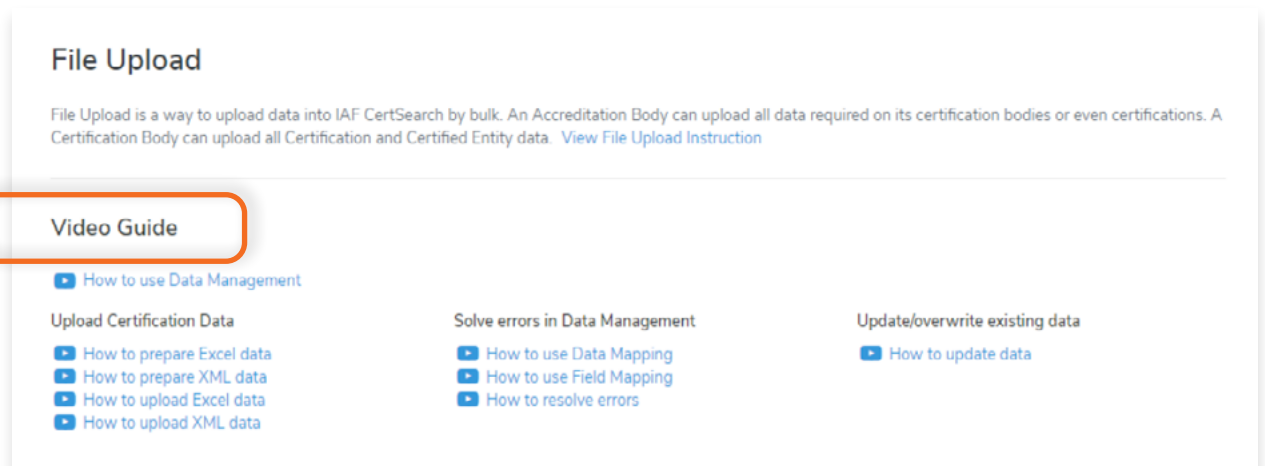
Step 1

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

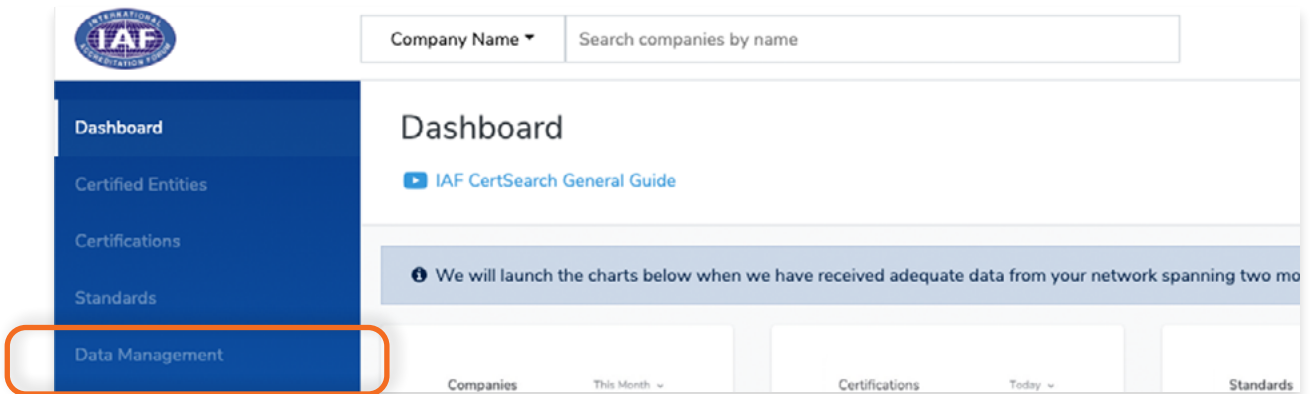
View the step by step guide below or watch the video guide here:

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

XML file upload: <https://www.youtube.com/watch?v=FJhc2NXv6A>

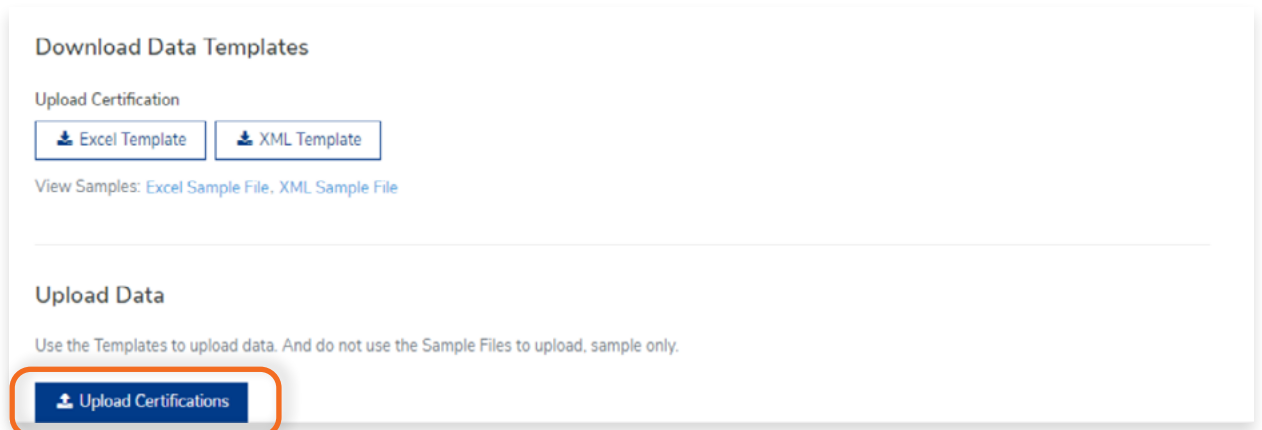
Step 1

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



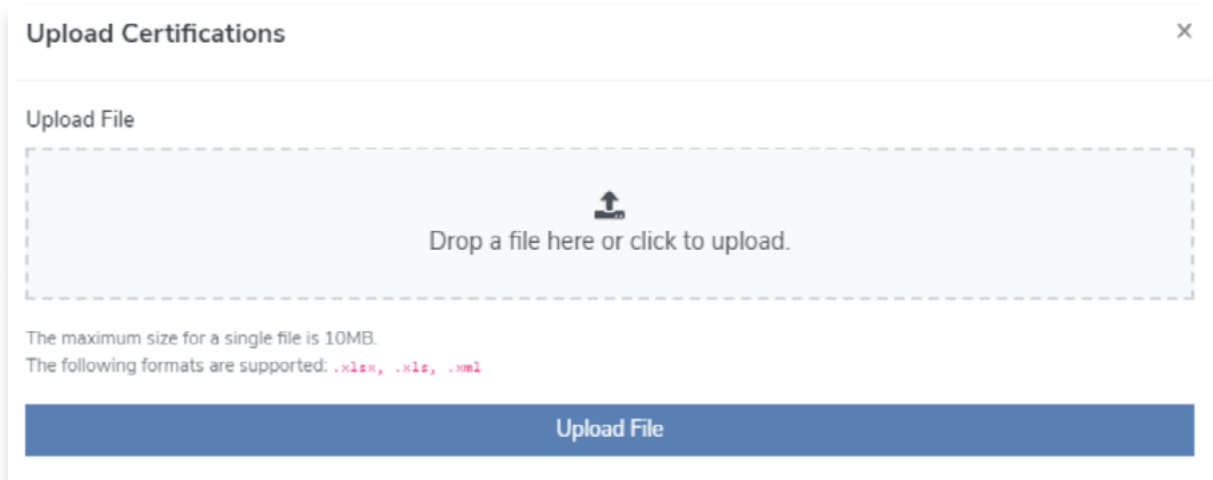
Step 2

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

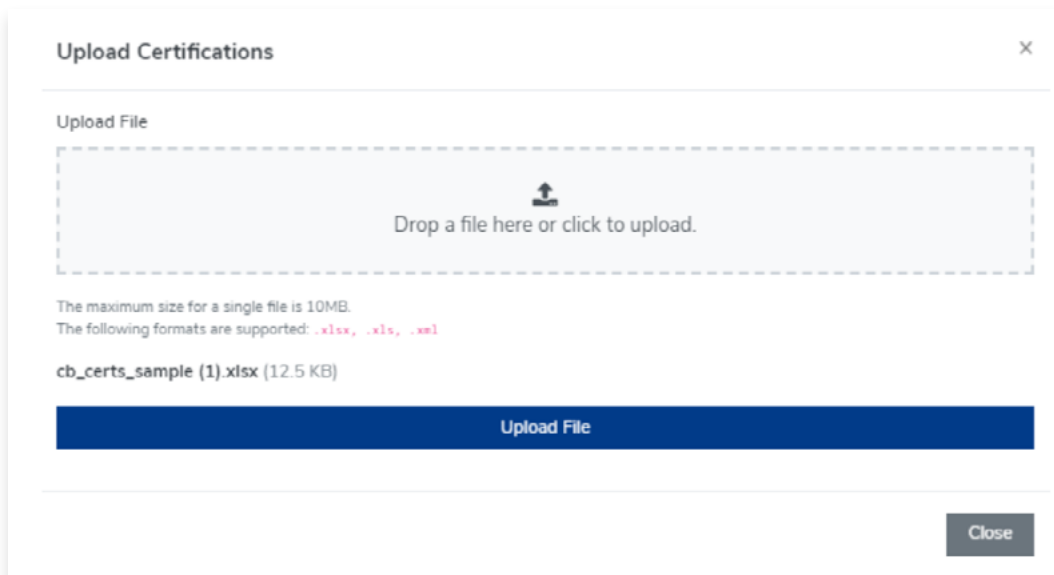
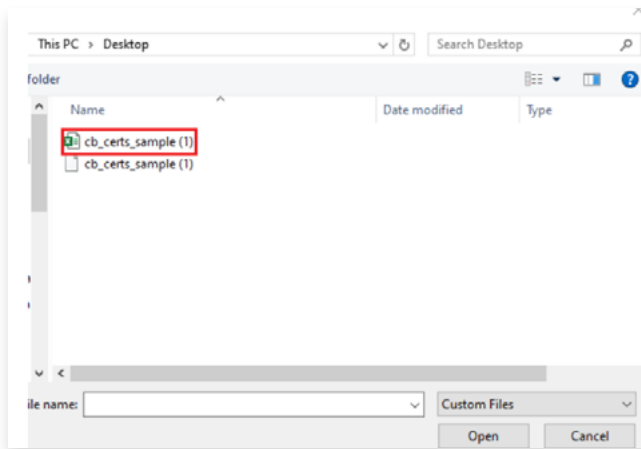


Step 3

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.

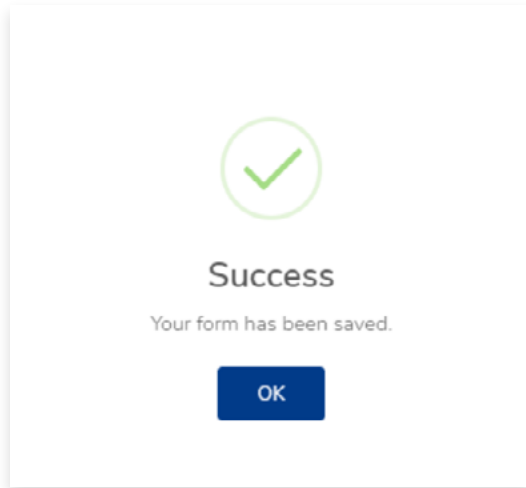


Once file is selected, click **Upload File** and your data will be uploaded. The maximum size for a single file is 10MB. If you have a file that is larger than 10MB, it is best that you segment your file into smaller file sizes.



6.6.2 How to Upload Certification Data in File Upload

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

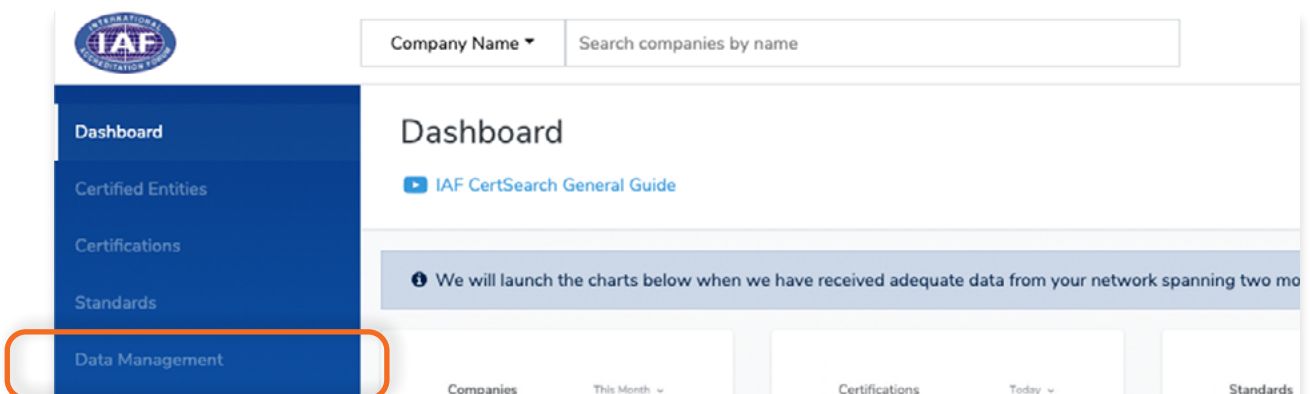
This is an example of how you can use a file upload to make edits. When you do a file upload it will make any edits that exist in the file. If data in the template is the same as what is already in IAF CertSearch no change will be made.

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.

The screenshot shows a web interface with a table of Certified Entities. At the top, there are filters for 'Filter by Status' and 'Filter by Location', along with buttons for 'Export CE Activation Links', '+ Add Certified Entity', and 'Send Bulk CE Activation'. Below the filters is a search bar labeled 'Search CE Name...'. The table has columns for Status, Unique ID, Certified Entity, Location, Certifications, Updated at, Created at, and Actions. Two rows are visible: one for 'reliable logistics services inc' (highlighted with a red circle) and one for 'test food and logistics inc'.

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at	Actions
Inactive	UNIQUEID-COMPANY02	reliable logistics services inc.	United States	1	2019-09-13	2019-09-13	Actions
Inactive	UNIQUEID-COMPANY01	test food and logistics inc.	United States	1	2019-09-13	2019-09-13	Actions

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.

P	Q	R	S	T	U
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	United States
UNIQUEID-COMPANY02	505N, Sam Houston Pkwy East, Suite # 682	Houston	Texas	77060	United States

Make the changes.

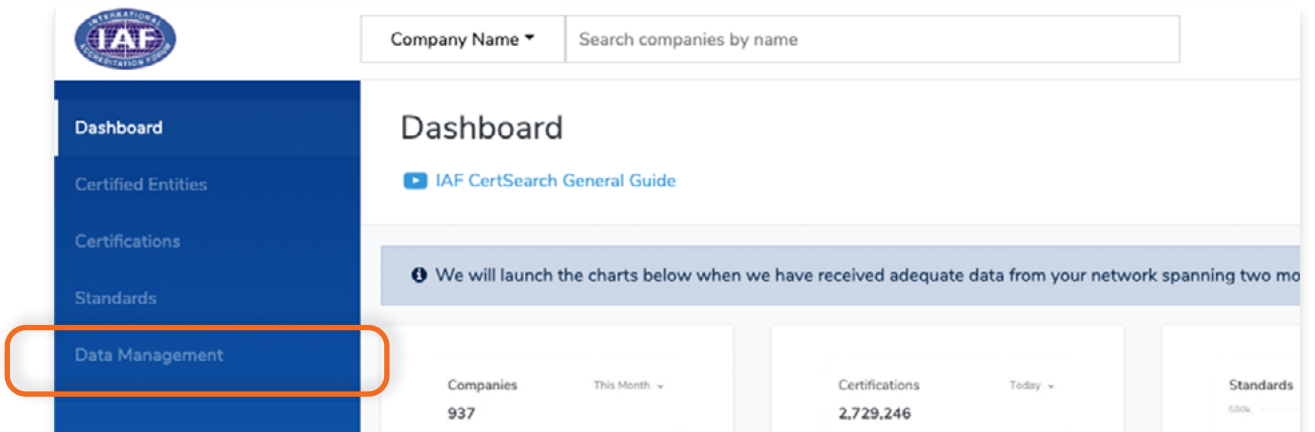
P	Q	R	S	T	U
Certified Entity Unique ID	Certified Entity Street	Certified Entity City	Certified Entity State	Certified Entity Zipcode/Postcode	Certified Entity Country/Economy
UNIQUEID-COMPANY01	Suite 100, #3601 E Algonquin Road	Rolling Meadows	Illinois	60008	United States
UNIQUEID-COMPANY02	505N, Sam Houston Pkwy East, Suite # 682	Houston	Texas	77060	Australia

Step 5

Save the File.

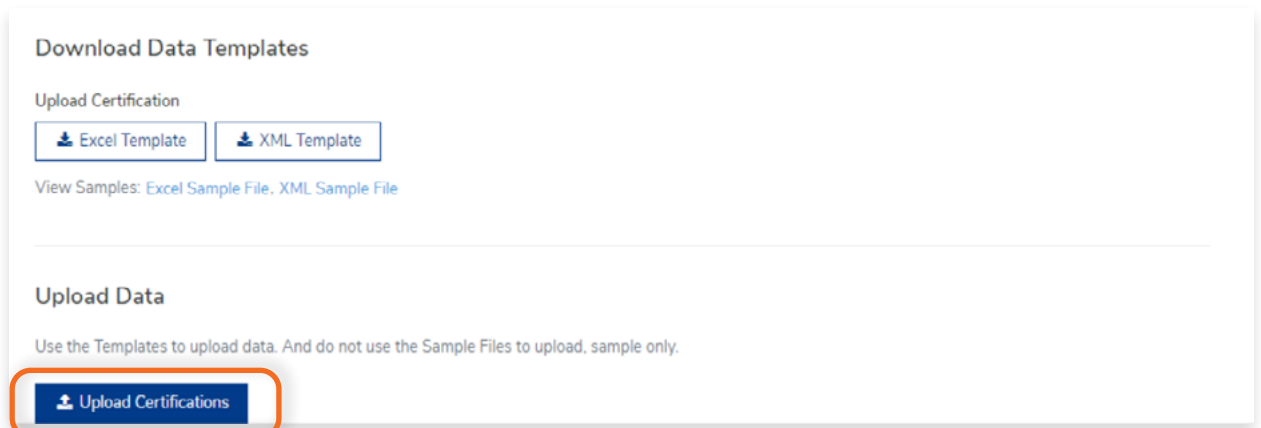
Step 6

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



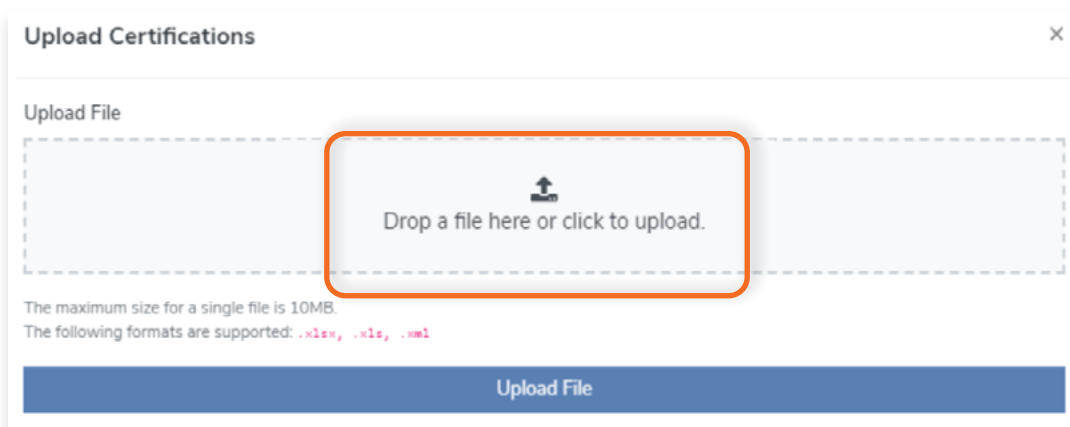
Step 7

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



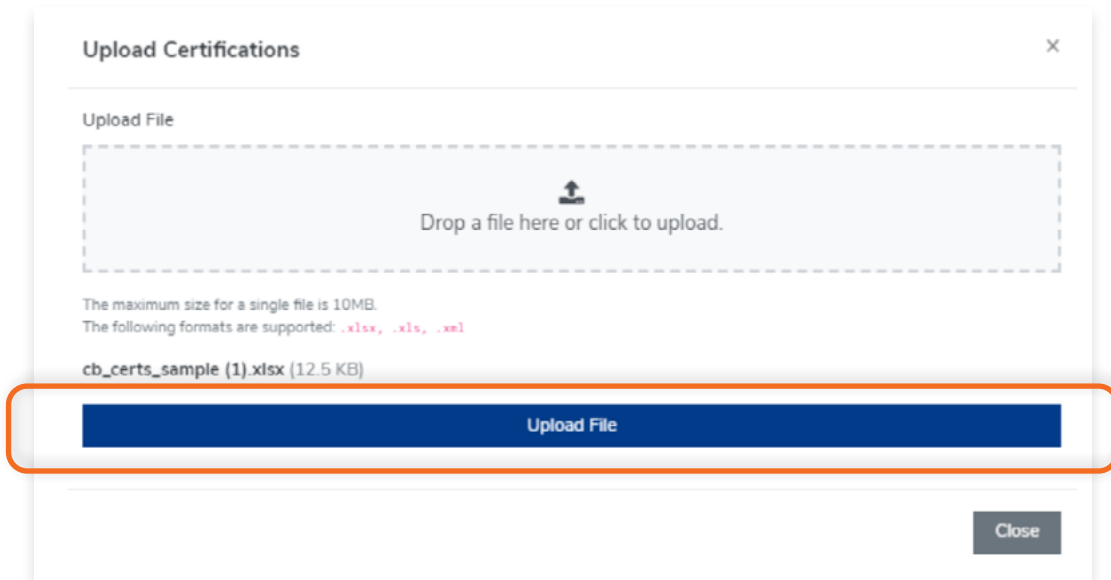
Step 8

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.

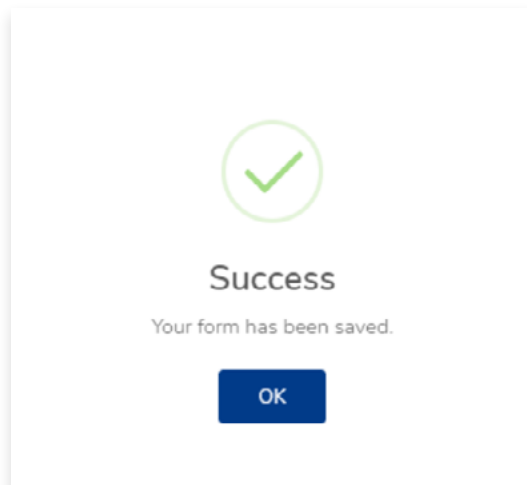


Step 9

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.

Certified Entities | 4

The Certified Entities provides the ability to view all of the Certified Entities which have been uploaded. Within the Certified Entities list you can refine the list Filtering by Status, Filtering by Location, Searching by Certified Entity Name. [More Detail](#)

[How to change CE details](#) [How to add certification to CE](#)

Filter by Status Filter by Location [Export CE Activation Links](#) [+ Add Certified Entity](#) [Send](#)

Search CE Name...

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at
Inactive	UNIQUEID-COMPANY02	reliable logistics services inc.	Australia	1	2019-09-13	2019-09-13
Inactive	UNIQUEID-COMPANY01	test food and logistics inc.	United States	1	2019-09-13	2019-09-13



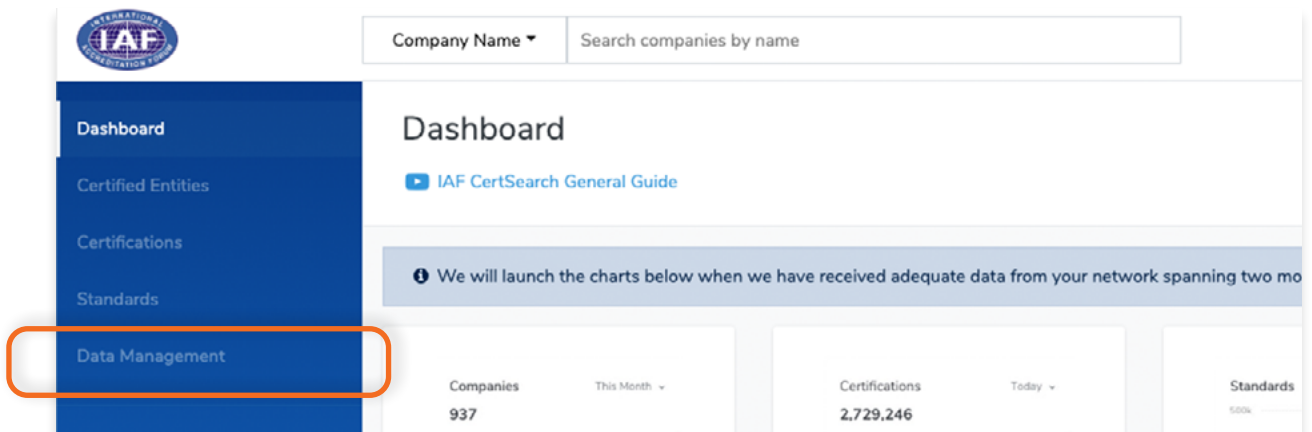
6.7 How to Use the FTP Access Section

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 every 24 hours. Any changes to the file will automatically be reflected in IAF CertSearch. CBs

Step 1

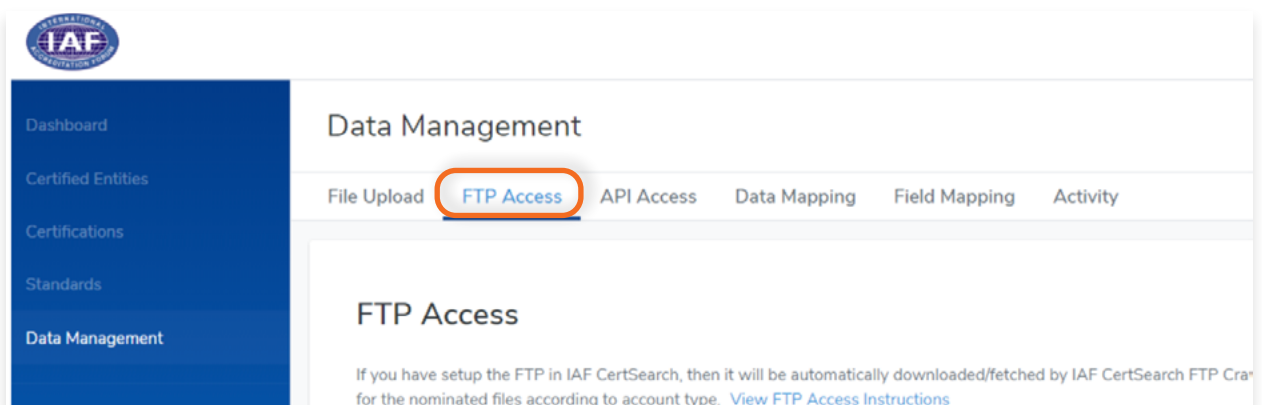
From the Dashboard, click **Data Management** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. The left-hand navigation menu is visible, with 'Data Management' highlighted by an orange rectangle. The main content area displays the dashboard title, a search bar for 'Company Name', and a video link for 'IAF CertSearch General Guide'. A notification banner states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. Below the banner, there are three data cards: 'Companies' with a value of 937, 'Certifications' with a value of 2,729,246, and 'Standards' with a value of 500k.

Step 2

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



The screenshot shows the IAF CertSearch Data Management page. The left-hand navigation menu is visible, with 'Data Management' highlighted. The top menu bar contains several options: 'File Upload', 'FTP Access' (highlighted with an orange rectangle), 'API Access', 'Data Mapping', 'Field Mapping', and 'Activity'. The main content area displays the title 'FTP Access' and a paragraph of text: 'If you have setup the FTP in IAF CertSearch, then it will be automatically downloaded/fetched by IAF CertSearch FTP Cra for the nominated files according to account type. [View FTP Access Instructions](#)'.



6.7.1 How to Upload File Using FTP

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

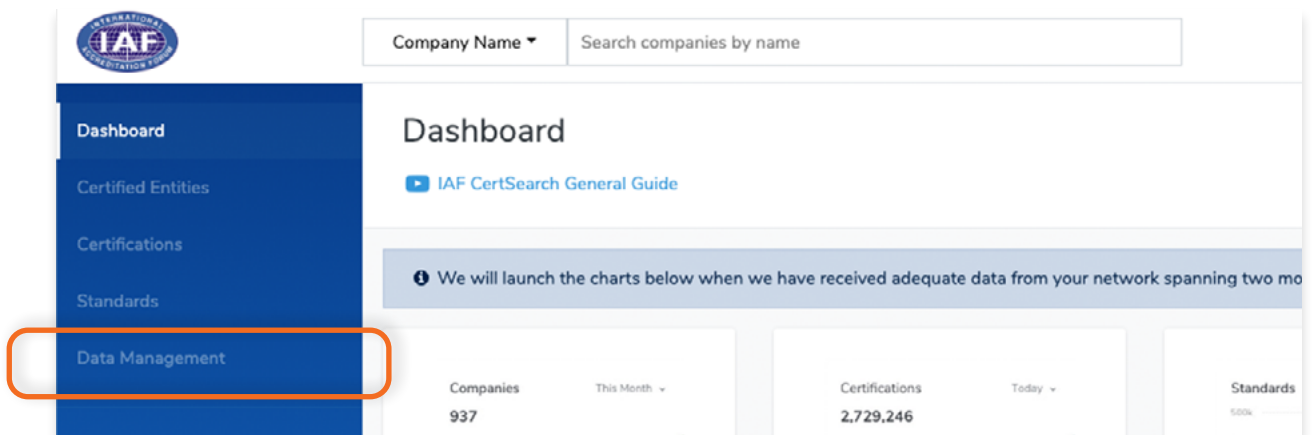
How to upload an Excel File using FTP: <https://youtu.be/qlz-jzmVtNI>

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.

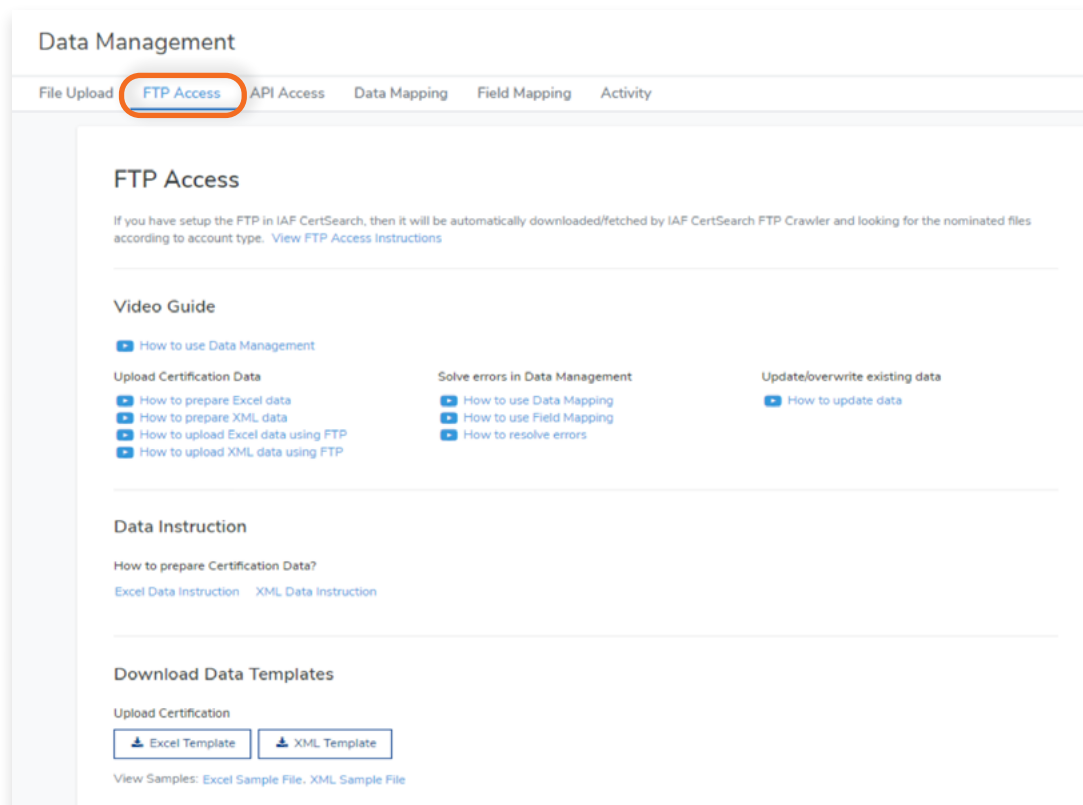
Step 1

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

Data Management

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

FTP Access

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 files according to account type. [View FTP Access Instructions](#)

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

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

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

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 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.

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](#)

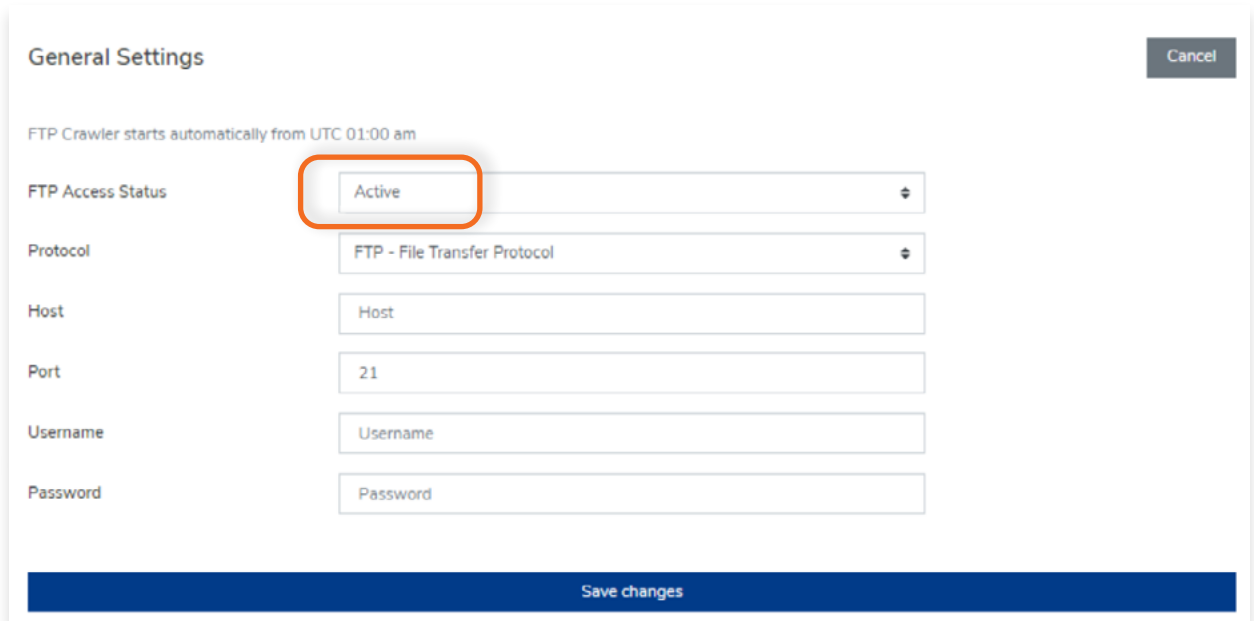
FTP Crawler starts automatically from UTC 01:00 am

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.



General Settings Cancel

FTP Crawler starts automatically from UTC 01:00 am

FTP Access Status: Active

Protocol: FTP - File Transfer Protocol

Host: Host

Port: 21

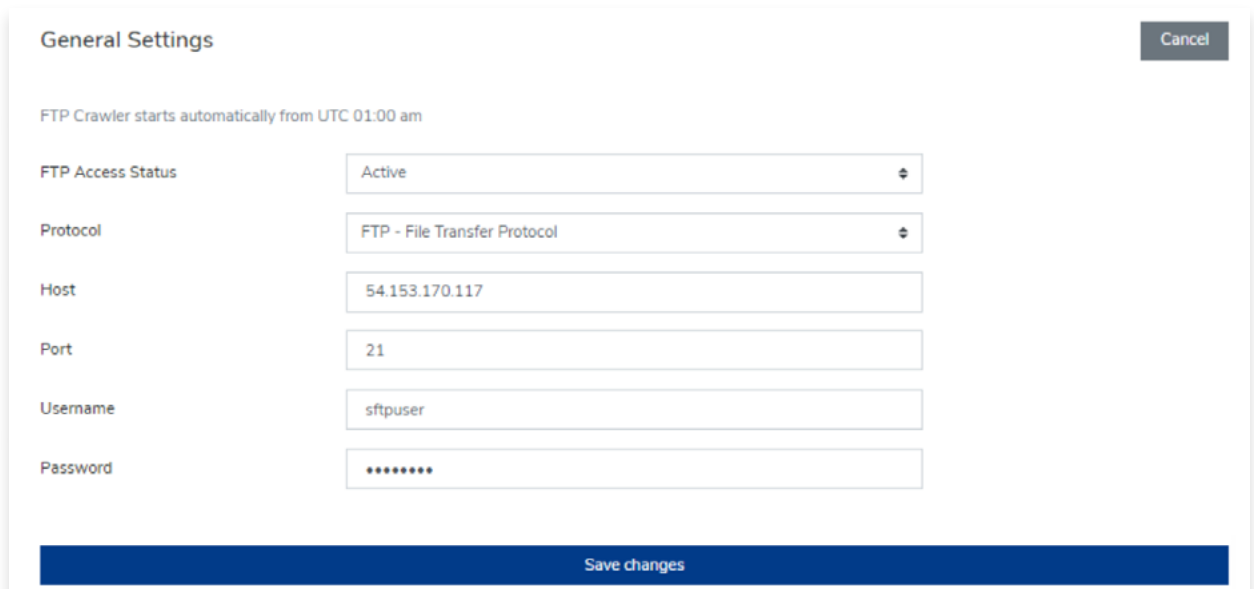
Username: Username

Password: Password

Save changes

Step 7

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



General Settings Cancel

FTP Crawler starts automatically from UTC 01:00 am

FTP Access Status: Active

Protocol: FTP - File Transfer Protocol

Host: 54.153.170.117

Port: 21

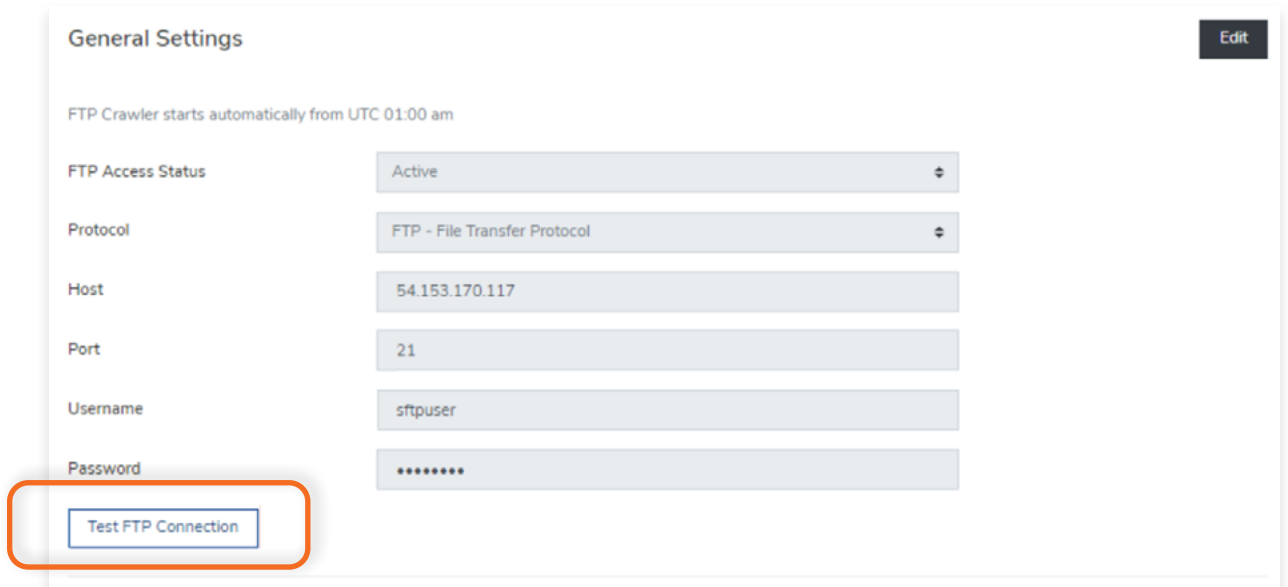
Username: sftpuser

Password: *****

Save changes

Step 8

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



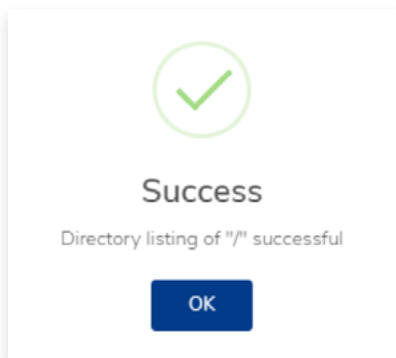
The screenshot shows a 'General Settings' dialog box with an 'Edit' button in the top right corner. Below the title bar, it states 'FTP Crawler starts automatically from UTC 01:00 am'. The settings are as follows:

FTP Access Status	Active
Protocol	FTP - File Transfer Protocol
Host	54.153.170.117
Port	21
Username	sftpuser
Password	*****

At the bottom left of the dialog, there is a button labeled 'Test FTP Connection', which is highlighted with an orange border.

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

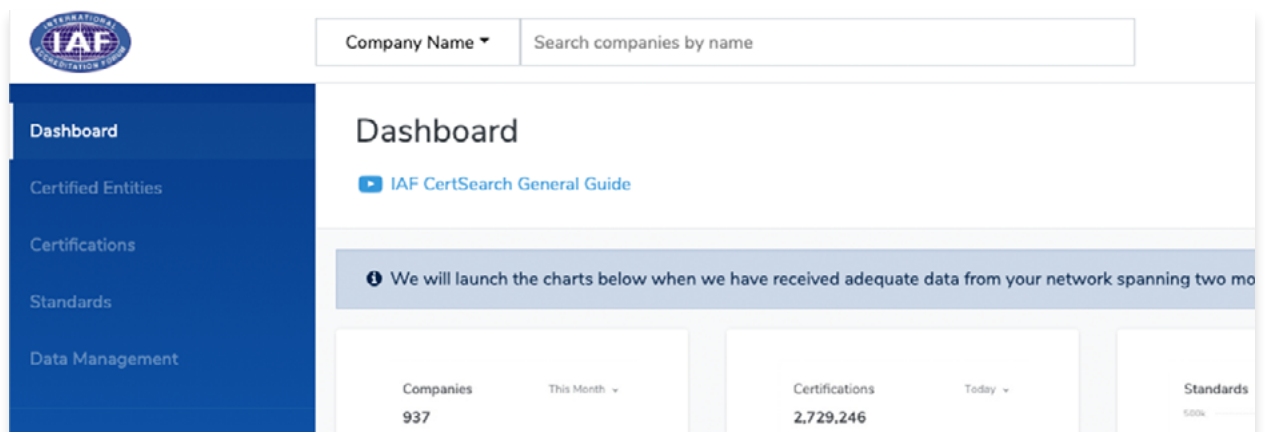
View the step by step guide below or watch the video guide here:

https://youtu.be/_TlEmirQOul

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

Step 1

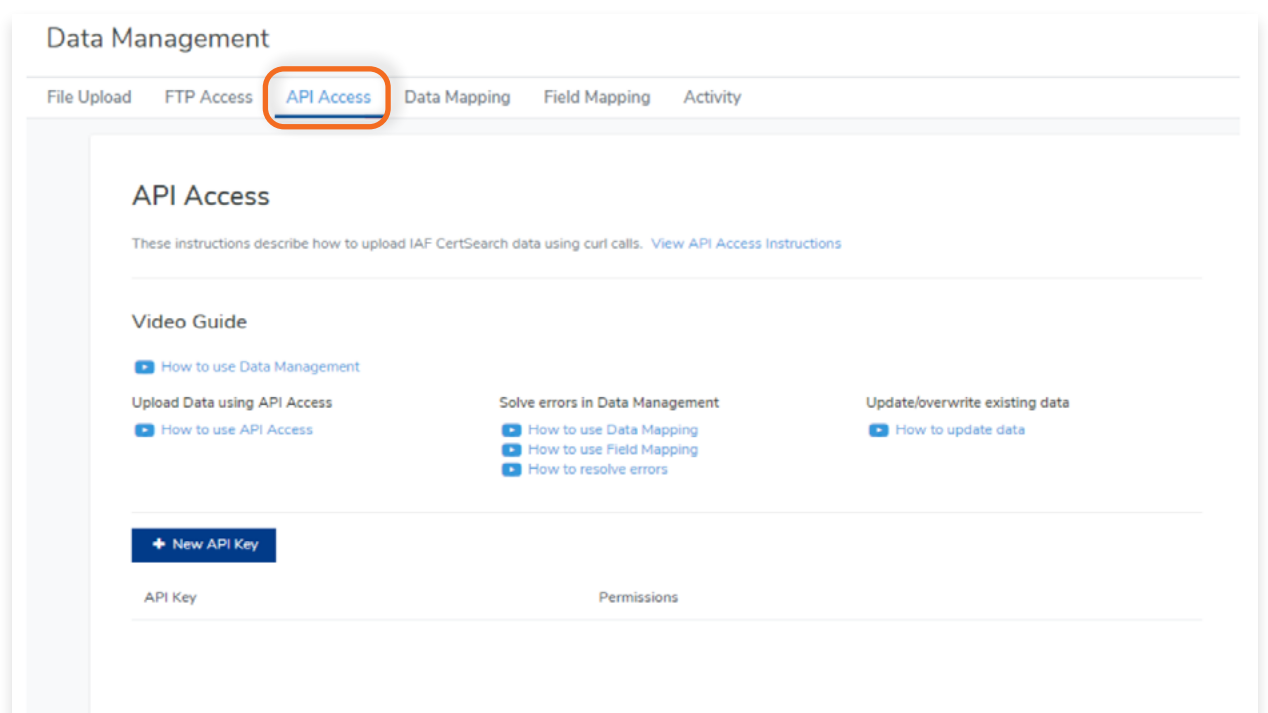
From the Dashboard, click **Data Management** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, and Data Management. The main content area features a search bar for 'Company Name' with the placeholder text 'Search companies by name'. Below the search bar, the dashboard title 'Dashboard' is followed by a video guide 'IAF CertSearch General Guide'. A notification banner states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. At the bottom, there are three data cards: 'Companies' with a value of 937, 'Certifications' with a value of 2,729,246, and 'Standards' with a value of 50k.

Step 2

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



The screenshot shows the 'Data Management' page with a sub-menu: File Upload, FTP Access, API Access (highlighted with an orange circle), Data Mapping, Field Mapping, and Activity. The main content area is titled 'API Access' and contains the following sections:

- 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](#)

At the bottom, there is a '+ New API Key' button and a table with columns for 'API Key' and 'Permissions'.



6.8.1 How to View API Access Instructions

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

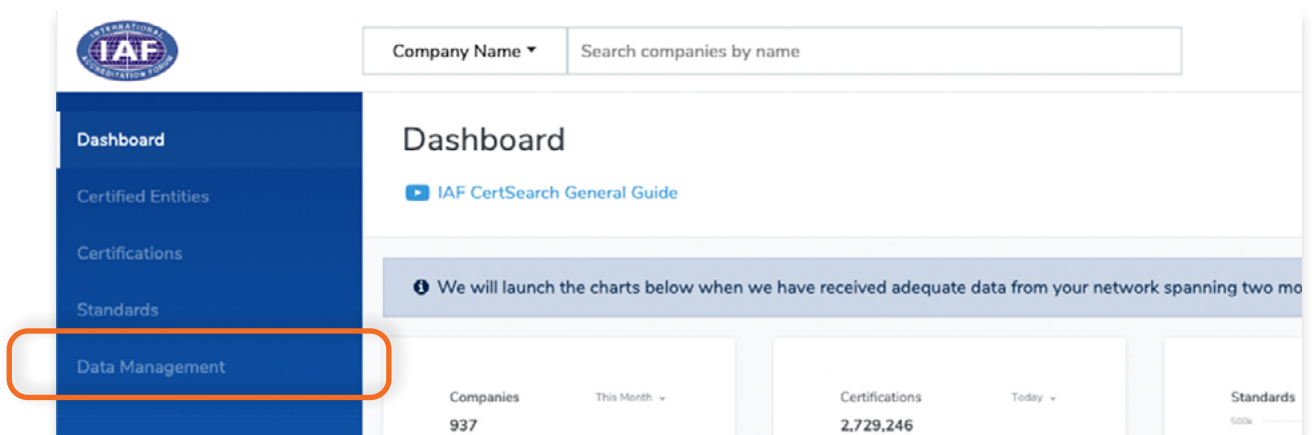
How to upload an Excel File using FTP: <https://youtu.be/qlz-lzmVtNI>

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.

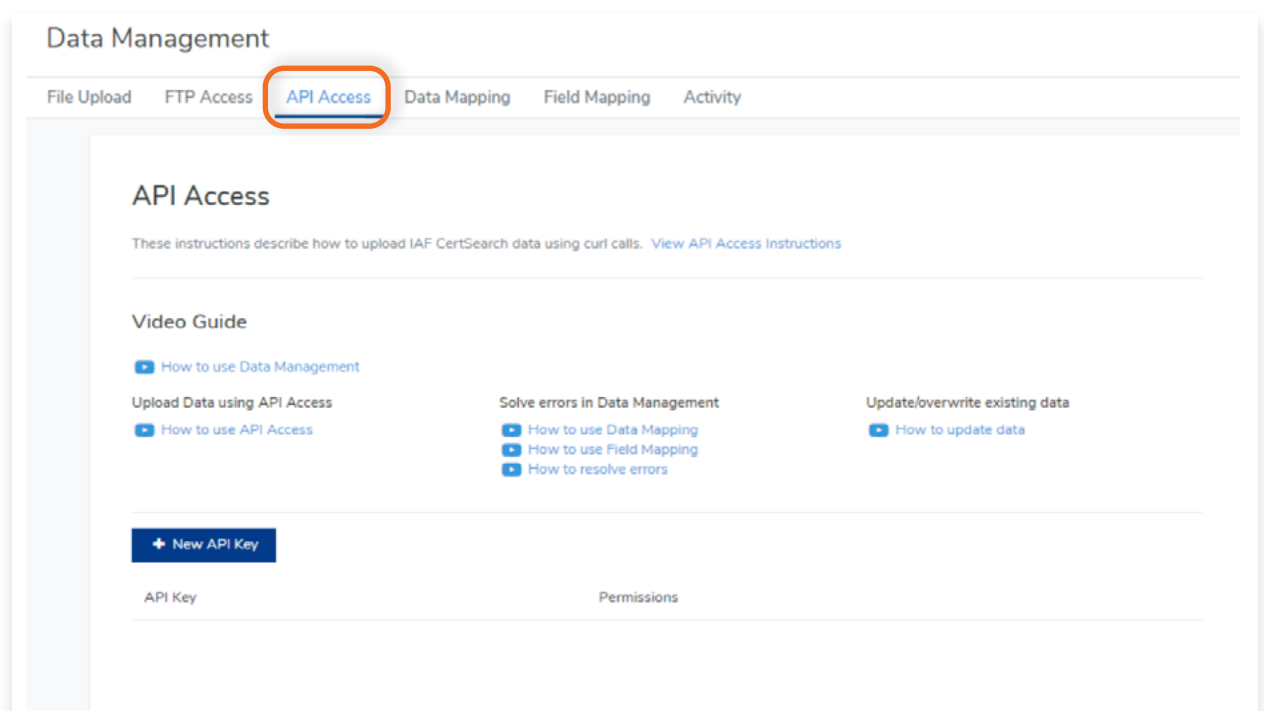
Step 1

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



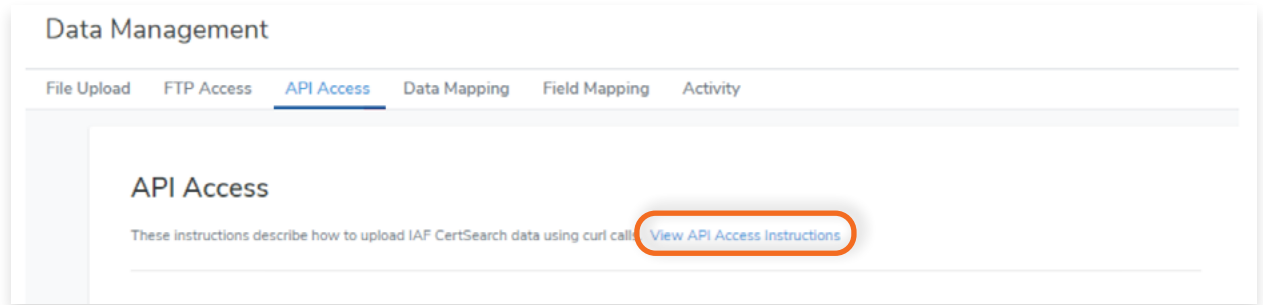
Step 2

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



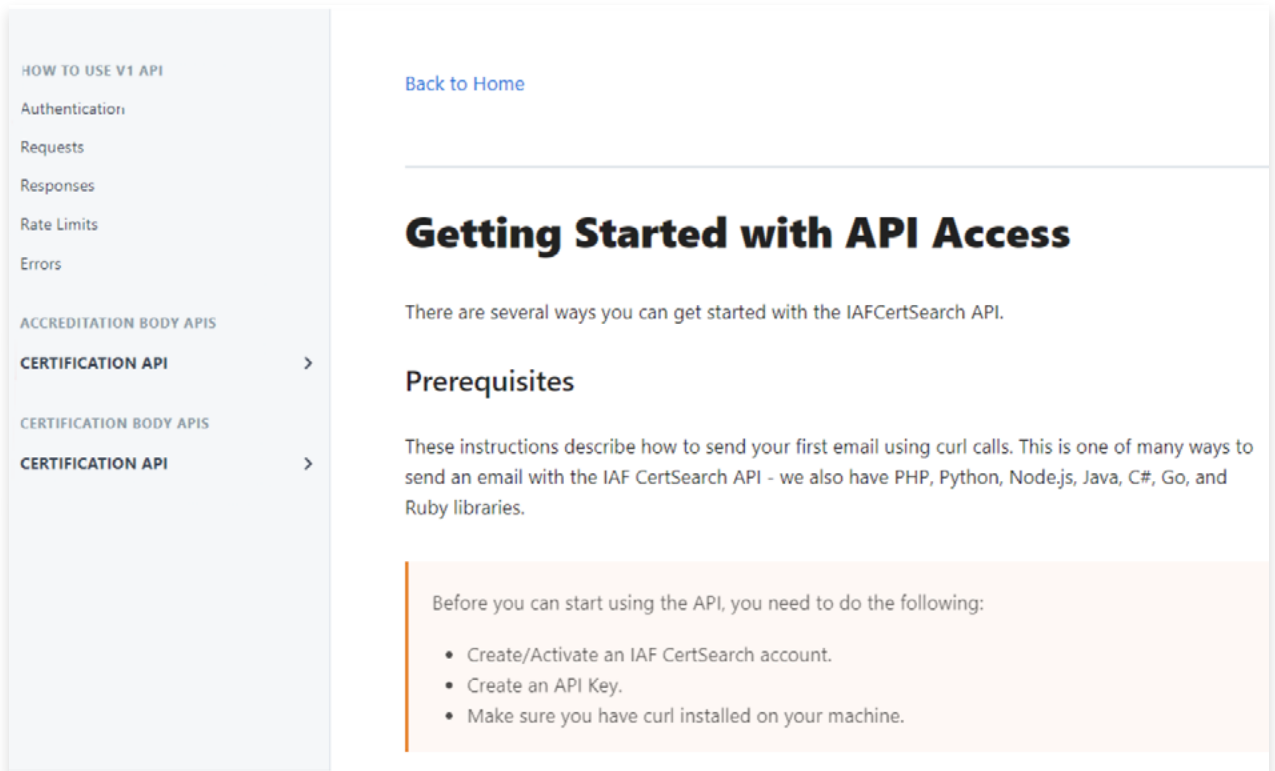
Step 3

Click **View API Access Instructions**



Step 4

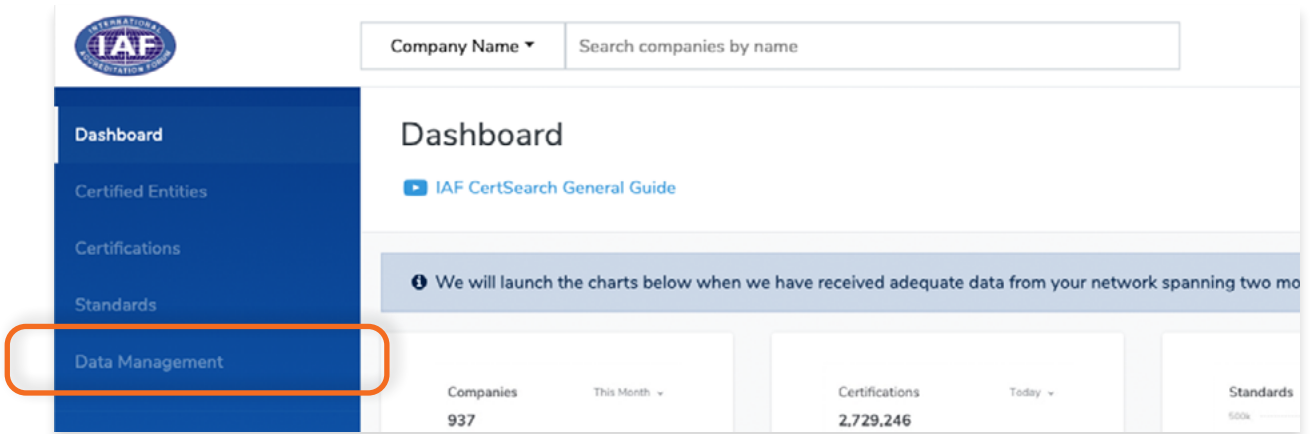
Read the API Access Instructions documentation.
The documentation provides clear instructions on how to establish the API.



6.8.2 How to Generate a New API Key

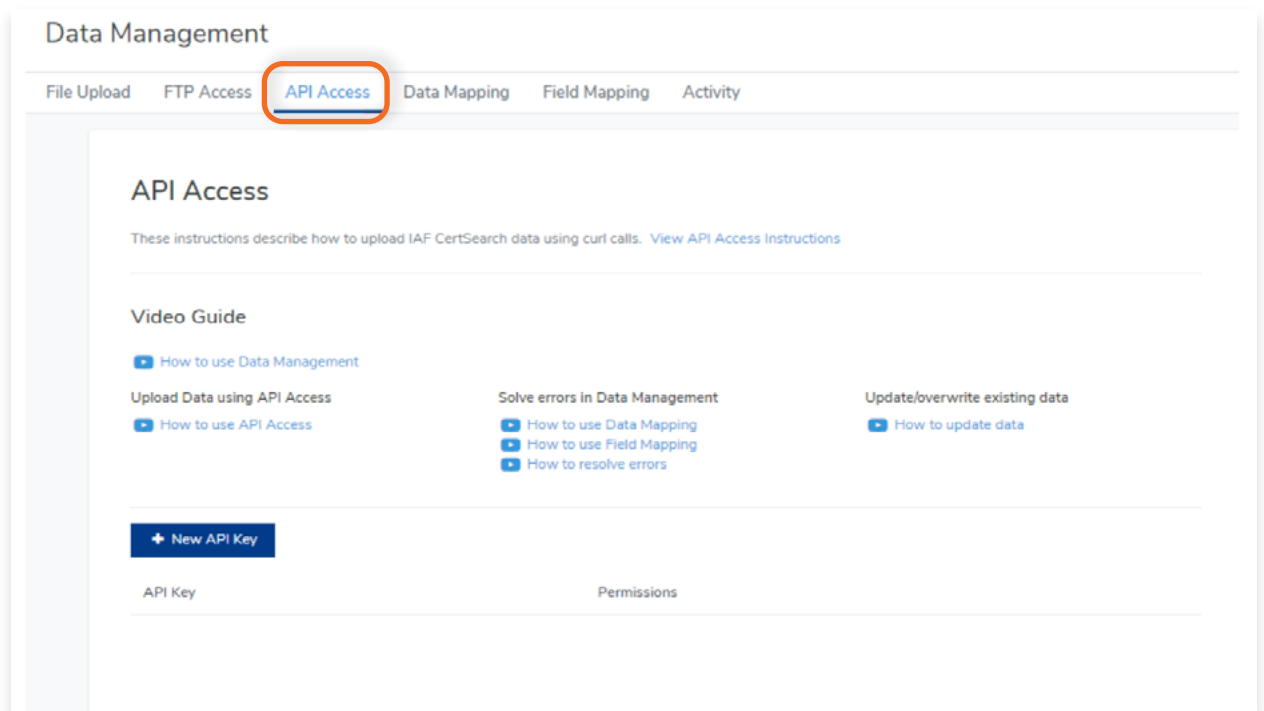
Step 1

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



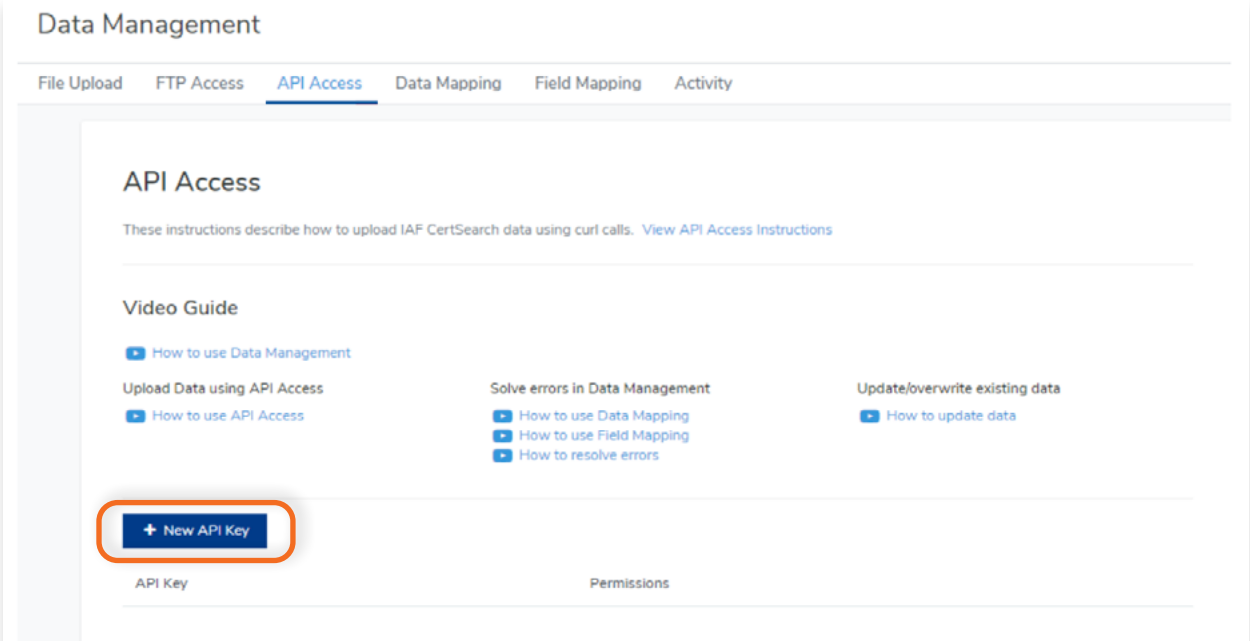
Step 2

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



Step 3

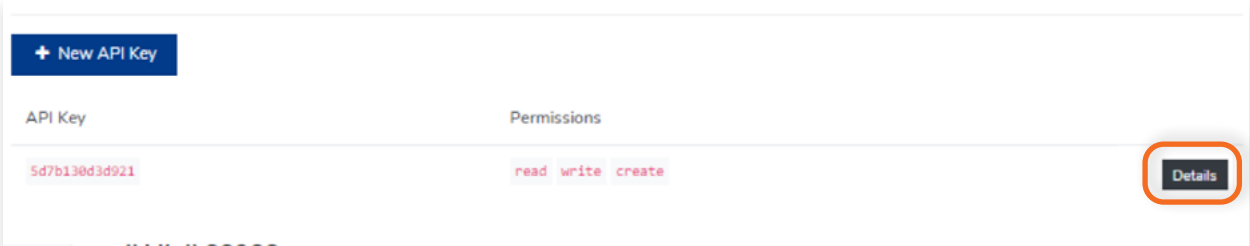
Under API Access, click **+ New API Key**



The screenshot shows the 'Data Management' interface with the 'API Access' tab selected. The page contains instructions, a video guide, and a list of links. A blue button labeled '+ New API Key' is highlighted with an orange circle. Below the button, there are columns for 'API Key' and 'Permissions'.

Step 4

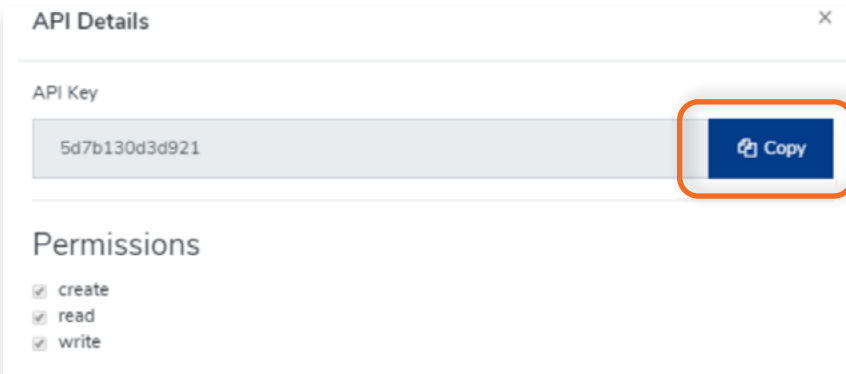
The API key will be generated. Click **Details**.



The screenshot shows the 'API Access' page with a table of API keys. The first row shows a generated API key '5d7b130d3d921' and permissions 'read write create'. A 'Details' button is highlighted with an orange circle.

Step 5

Copy the API Key.



The screenshot shows the 'API Details' modal. It displays the API key '5d7b130d3d921' and a 'Copy' button highlighted with an orange circle. Below, the permissions 'create', 'read', and 'write' are listed with checked checkboxes.



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

Upload Data

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

[Upload Certifications](#)

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
● Error	File Upload	Excel	Certification	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-13 12:17:07	View

Step 5

Click View

Upload Data

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

[Upload Certifications](#)

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
● Error	File Upload	Excel	Certification	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-13 12:17:07	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.

Activity Details

Activity: File Upload
File Type: Excel
Uploaded at: 2019-09-13 12:17:07

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

Step 7

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

Activity Details x

Activity: File Upload
 File Type: Excel
 Uploaded at: 2019-09-13 12:17:07

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

Step 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

Delete

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 -

Step 9

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

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 -

Step 10

Click **Edit**

The screenshot shows a dialog box titled "Mapping Details" with a close button (X) in the top right corner. Below the title is a section labeled "MAPPING VALUE" with an "Edit" button highlighted by an orange circle. The dialog contains four fields: "Mapping Type" (Country), "Mapping Status" (Inactive), "Source (Data Value from File)" (usa), and "Target (IAF CertSearch Value)" (Afghanistan).

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".

The screenshot shows the "Mapping Details" dialog box with changes. The "Mapping Status" field is now "Active" and the "Target (IAF CertSearch Value)" field is "United States", both highlighted with orange circles. A "Cancel" button is visible in the top right, and a "Save changes" button is at the bottom.

Step 11

Click **Save changes**

The screenshot shows the "Mapping Details" dialog box with the "Save changes" button highlighted by an orange circle. The fields for "Mapping Type" (Country), "Mapping Status" (Active), "Source (Data Value from File)" (usa), and "Target (IAF CertSearch Value)" (United States) are visible above the button.

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.

Status	Activity	File Format	File	Details	Uploaded at	Actions
Success	File Upload	Excel	Certification	Excel file has been uploaded.	2019-09-13 12:41:39	
Error	File Upload	Excel	Certification	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-13 12:17:07	View

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

Certified Entities | 4

The Certified Entities provides the ability to view all of the Certified Entities which have been uploaded. Within the Certified Entities list you can refine the list Filtering by Status, Filtering by Location, Searching by Certified Entity Name. [More Detail](#)

[How to change CE details](#) [How to add certification to CE](#)

Filter by Status Filter by Location [Export CE Activation Links](#) [+ Add Certified Entity](#) [Send](#)

Search CE Name...

Status	Unique ID	Certified Entity	Location	Certifications	Updated at	Created at
Inactive	UNIQUEID-COMPANY02	reliable logistics services inc.	United States	1	2019-09-13	2019-09-13
Inactive	UNIQUEID-COMPANY01	test food and logistics inc.	United States	1	2019-09-13	2019-09-13



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"

T Certified Entity Zipcode/Postcode	U Certified Entity Country/Economy	V AB Name	W 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](#)

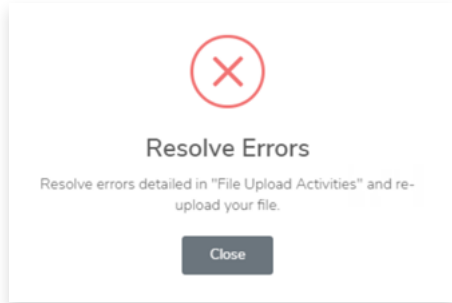
Upload Data

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

Upload Data

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

[Upload Certifications](#)

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
● Error	File Upload	Excel	Certification	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-13 12:17:07	View

Step 5

Click **View**

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at	Actions
● Error	File Upload	Excel	Certification	Found 2 errors in 1 sheets Country mapping required: 2	2019-09-13 12:17:07	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.

Activity Details					
Activity	File Upload				
File Type	Excel				
Uploaded at	2019-09-13 12:59:41				
Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification	Ab Name	0		Field mapping required	Go to Field Mapping and resolve requests.
Certification	Ab Acronym	0		Field mapping required	Go to Field Mapping and resolve requests.

Step 7

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

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

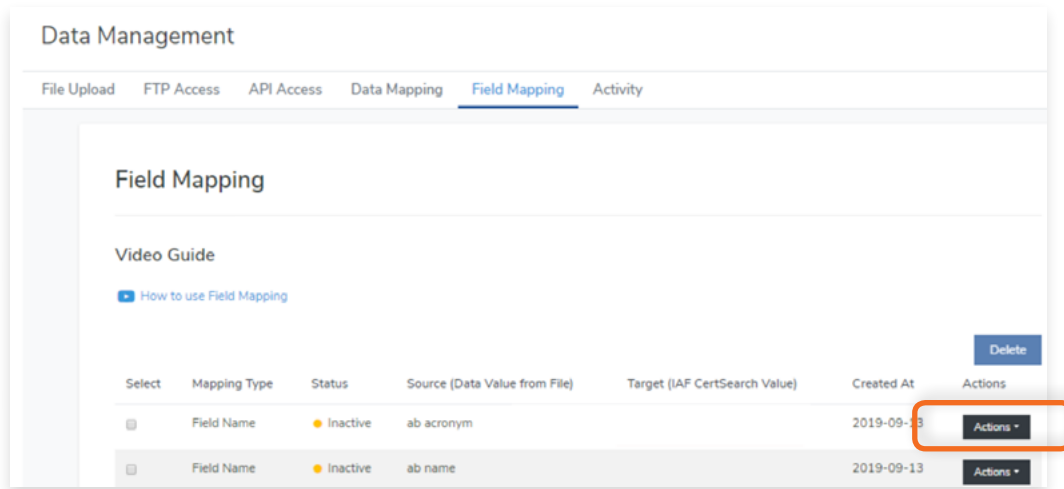
Step 8

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

Data Management						
File Upload FTP Access API Access Data Mapping <u>Field Mapping</u> Activity						
Field Mapping						
Video Guide						
How to use Field Mapping						
Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created At	Actions
<input type="checkbox"/>	Field Name	Inactive	ab acronym	<input type="text"/>	2019-09-13	Actions
<input type="checkbox"/>	Field Name	Inactive	ab name	<input type="text"/>	2019-09-13	Actions

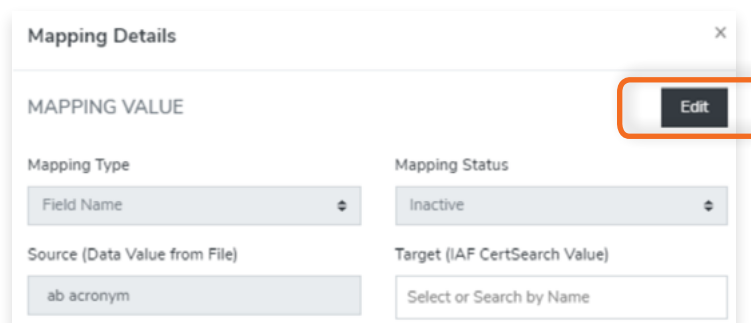
Step 9

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



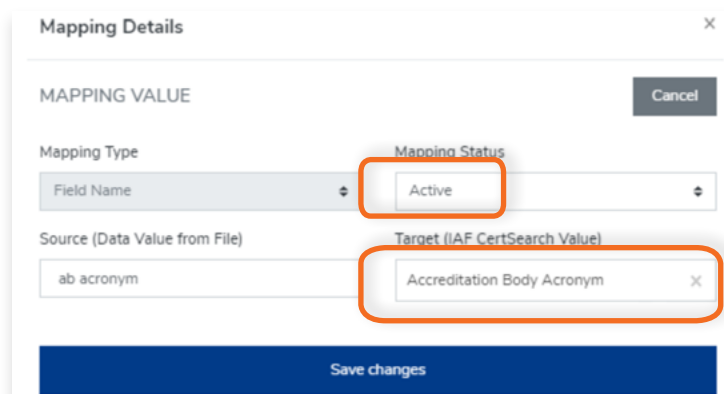
Step 10

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.

How to use Field Mapping

Select	Mapping Type	Status	Source (Data Value from File)	Target (IAF CertSearch Value)	Created At	Actions
<input type="checkbox"/>	Field Name	Active	ab acronym	Accreditation Body Acronym	2019-09-13	Actions
<input type="checkbox"/>	Field Name	Inactive	ab name		2019-09-13	Actions

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.

Upload Data

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

Upload Certifications

File Upload Activities

Status	Activity	File Format	File	Details	Uploaded at
Success	File Upload	Excel	Certification	Excel file has been uploaded.	2019-09-13 13:26:20



6.11 How to Resolve Upload Errors

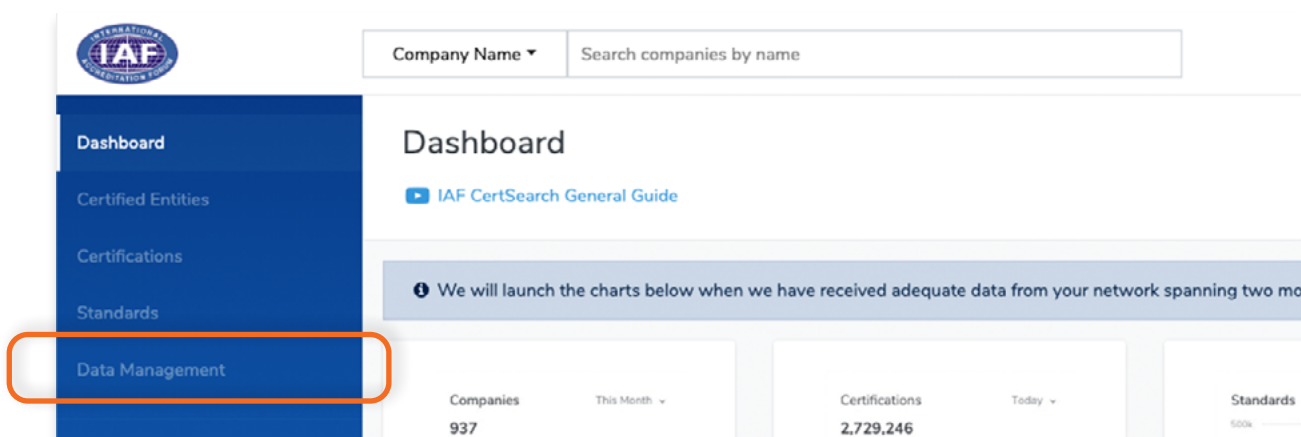
Do not be alarmed if you receive an error. It does not mean that IAF CertSearch is not working, it just means there are data errors which need to be resolved so the data can be accepted. IAF Certsearch will pin point where the errors are so you can easily resolve.

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

<https://youtu.be/x1u6puu4zrl>

Step 1

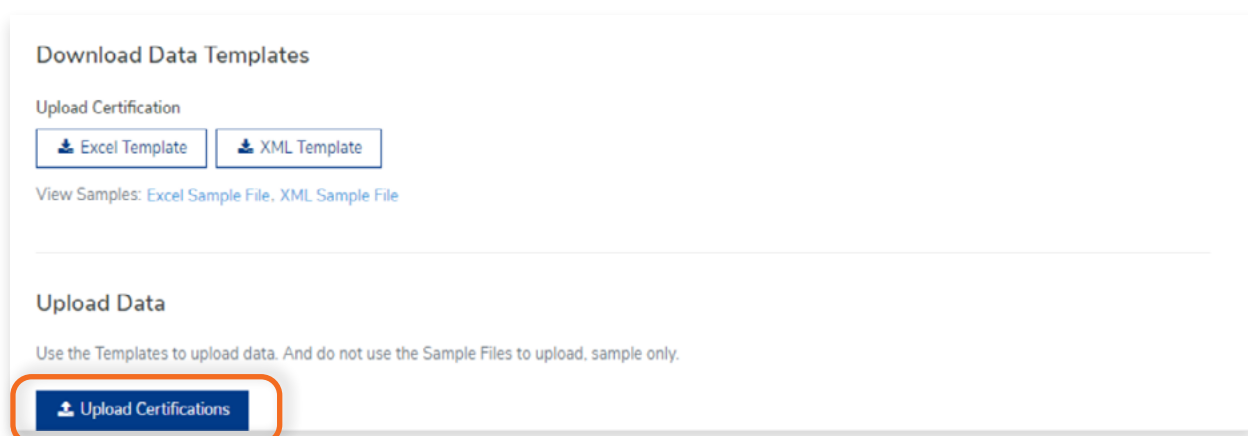
From the Dashboard, click **Data Management** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left is a dark blue navigation menu with the IAF logo at the top. The menu items are: Dashboard, Certified Entities, Certifications, Standards, and Data Management. The 'Data Management' item is highlighted with an orange rectangular box. To the right of the menu is the main dashboard area, which includes a search bar for 'Company Name', a video player for 'IAF CertSearch General Guide', a notification banner, and a summary table. The summary table has columns for 'Companies', 'Certifications', and 'Standards'. The 'Companies' column shows '937' and 'This Month' as a filter. The 'Certifications' column shows '2,729,246' and 'Today' as a filter. The 'Standards' column shows '150k'.

Step 2

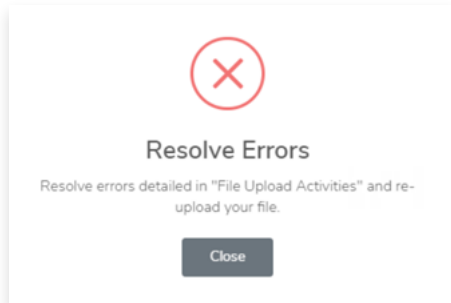
Upload a file. Click **Upload Certifications**.



The screenshot shows the 'Download Data Templates' section of the application. It has a sub-header 'Upload Certification' and two buttons: 'Excel Template' and 'XML Template'. Below these are links for 'View Samples: Excel Sample File, XML Sample File'. The section is followed by 'Upload Data' with a note: 'Use the Templates to upload data. And do not use the Sample Files to upload, sample only.' At the bottom of this section, the 'Upload Certifications' button is highlighted with an orange rectangular box.

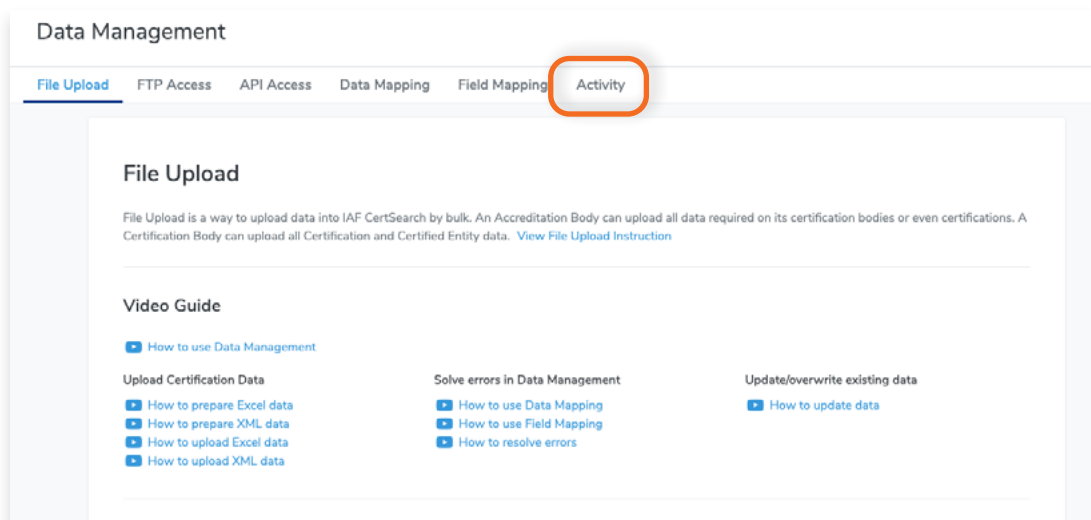
Step 3

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



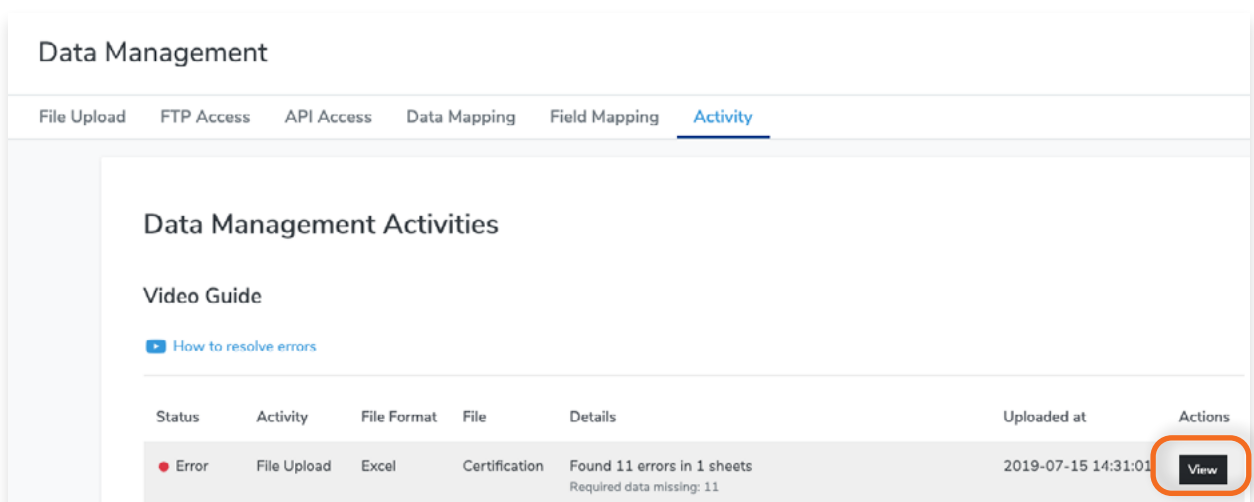
Step 4

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.

Activity Details x

Activity: File Upload
 File Type: Excel
 Uploaded at: 2019-09-13 13:37:26

Spread Sheet	Field name	Row	Field value	Error	Suggestion
Certification	Certificate Number	2		Required data missing	Ensure Certificate Number is not blank. Please see Data Instruction .

Step 7

Resolve the issue in your file.

	A	B	C	D
1	Certification Identity Number	Certificate Number	Certification Status	Accreditation Status
	UNIQUEID-CERT01		Active	Accredited
2	UNIQUEID-CERT02	60119-A01	Active	Accredited
3				
4				

Resolve the issue in your file.

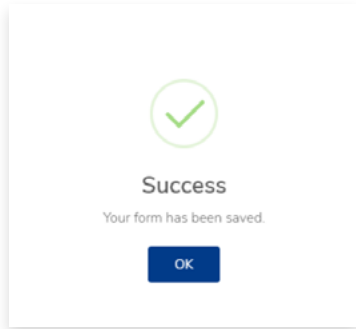
	A	B	C	D
1	Certification Identity Number	Certificate Number	Certification Status	Accreditation Status
	UNIQUEID-CERT01	20897-A01	Active	Accredited
2	UNIQUEID-CERT02	60119-A01	Active	Accredited
3				

Step 7

Re-upload the file.

Step 9

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



File Upload Activities						
Status	Activity	File Format	File	Details	Uploaded at	Actions
● Success	File Upload	Excel	Certification	Excel file has been uploaded.	2019-07-01 11:49:48	



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.

The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, **Enquiries** (highlighted with an orange box), Accounts, and Users. The main content area features a search bar for 'Company Name' with the placeholder text 'Search companies by name'. Below the search bar, the dashboard displays three charts: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001). A notification banner at the top of the charts area states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'.

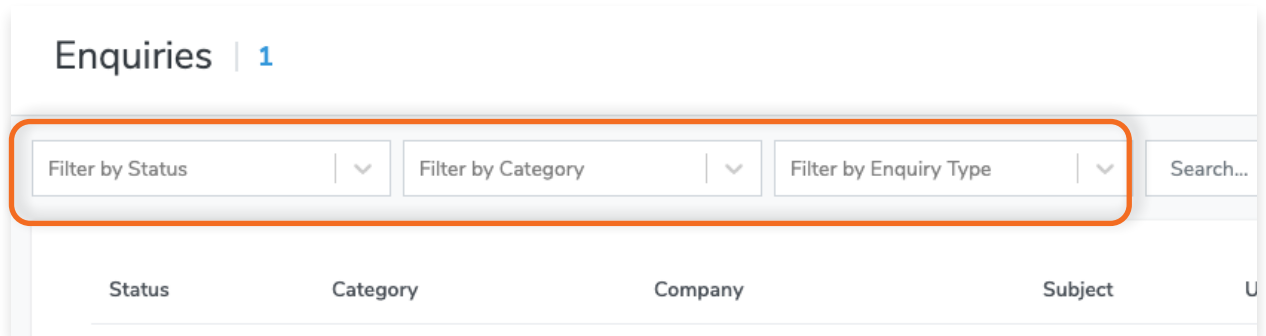
Step 2

Find the specific Enquiry you want to view.

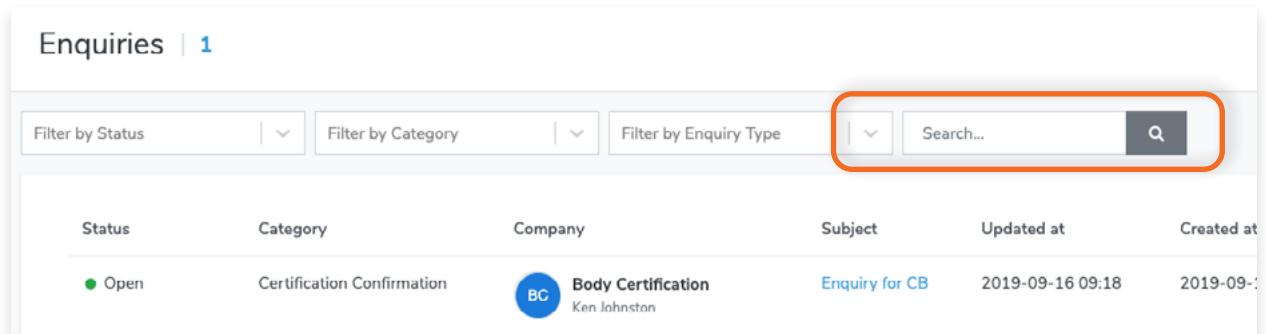
The screenshot shows the 'Enquiries' page with 1 enquiry. The page includes filter options for Status, Category, and Enquiry Type, along with a search bar. The enquiry table is as follows:

Status	Category	Company	Subject	Updated at	Created at	Actions
● Open	Certification Confirmation	Body Certification Ken Johnston	Enquiry for CB	2019-09-16 09:18	2019-09-16 09:18	View

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

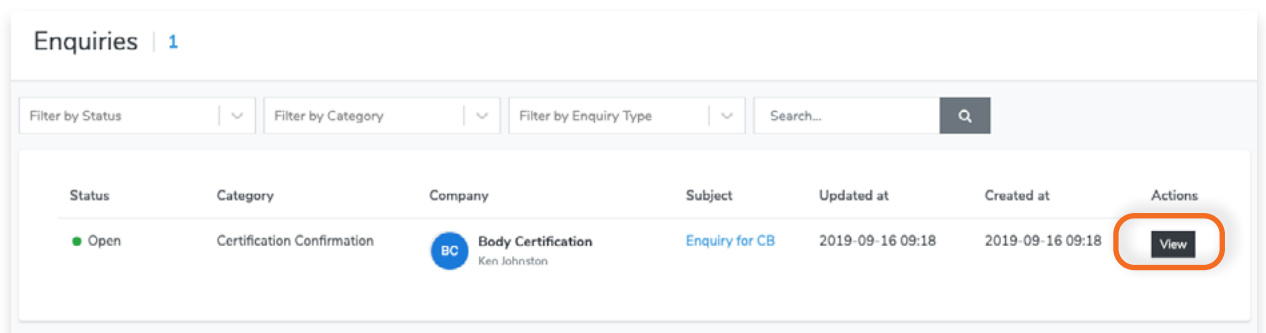


A Search box is also provided to help you search a specific enquiry.



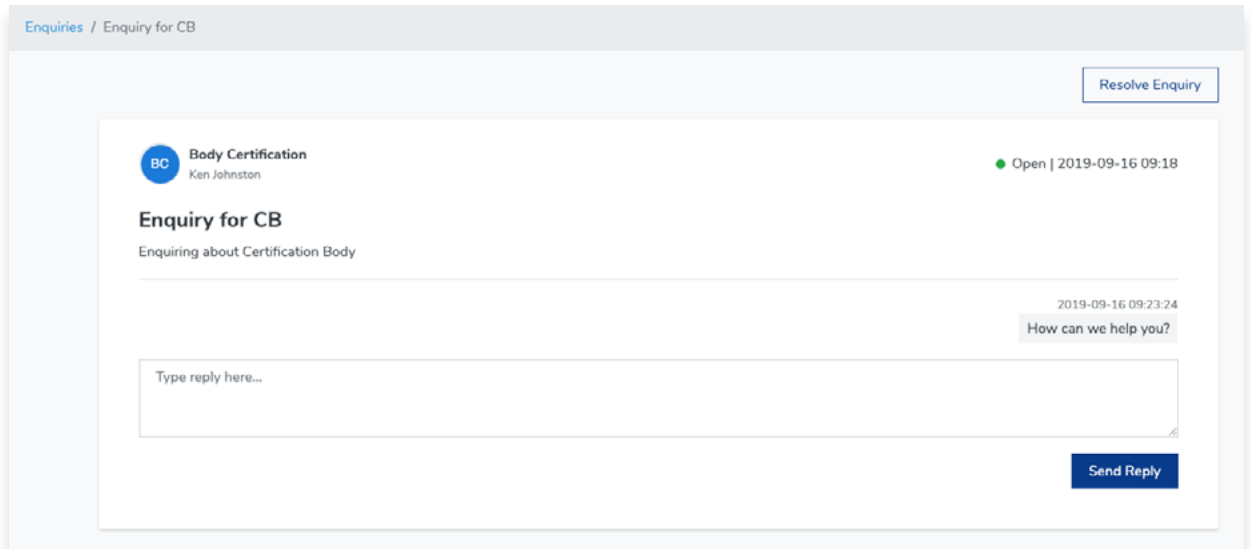
Step 3

Click View



Step 4

Now you can view the Enquiry.



The screenshot shows a web interface for viewing an enquiry. At the top left, it says "Enquiries / Enquiry for CB". In the top right corner, there is a button labeled "Resolve Enquiry". The main content area features a profile for "Body Certification" with a blue circular logo containing the letters "BC" and the name "Ken Johnston" below it. To the right of the profile, it indicates the enquiry status as "Open" with a green dot and the timestamp "2019-09-16 09:18". The enquiry title is "Enquiry for CB" with the subtitle "Enquiring about Certification Body". Below this, there is a horizontal line. On the right side, a timestamp "2019-09-16 09:23:24" is shown above a text box containing the question "How can we help you?". Below the question is a large text input field with the placeholder text "Type reply here...". In the bottom right corner of the input area, there is a blue button labeled "Send Reply".



7.2 How to Reply to Enquiries

Step 1

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

The screenshot shows the IAF CertSearch dashboard. On the left, a blue navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, **Enquiries** (highlighted with an orange box), and Accounts. The main content area features a search bar for 'Company Name', a 'Dashboard' title, and 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 mo...'. Three charts are visible: 'Companies' (937) for 'This Month', 'Certifications' (2,729,246) for 'Today', and 'Standards'.

Step 2

Find the specific Enquiry you want to view.

The screenshot shows the 'Enquiries' list page. At the top, it says 'Enquiries | 1'. Below are filter options: 'Filter by Status', 'Filter by Category', 'Filter by Enquiry Type', and a search bar. The main table has the following data:

Status	Category	Company	Subject	Updated at	Created at	Actions
● Open	Certification Confirmation	Body Certification Ken Johnston	Enquiry for CB	2019-09-16 09:18	2019-09-16 09:18	View (highlighted)

Step 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 'Reply to Enquiry' interface. At the top, it displays the enquiry details: 'BC Body Certification Ken Johnston', 'Enquiry for CB', and 'Enquiring about Certification Body'. The status is 'Open | 2019-09-16 09:18'. Below this is a text box for the response, with a placeholder 'Type reply here...'. A timestamp '2019-09-16 09:23:24' and the text 'How can we help you?' are visible. The 'Send Reply' button is highlighted with an orange box.



7.3 How to Resolve Enquiries

Step 1

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

The screenshot shows the IAF CertSearch Dashboard. On the left, a navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries (highlighted with an orange box), and Accounts. The main content area features a search bar for 'Company Name' and a 'Dashboard' header. Below the header, there are three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. A notification banner at the top of the charts area reads: 'We will launch the charts below when we have received adequate data from your network spanning two mo'.

Step 2

Find the specific Enquiry you want to view.

The screenshot shows the 'Enquiries' list page. At the top, there are filters for 'Filter by Status', 'Filter by Category', and 'Filter by Enquiry Type', along with a search bar. Below the filters is a table with the following data:

Status	Category	Company	Subject	Updated at	Created at	Actions
Open	Certification Confirmation	BC Body Certification Ken Johnston	Enquiry for CB	2019-09-16 09:18	2019-09-16 09:18	View (highlighted)

Step 4

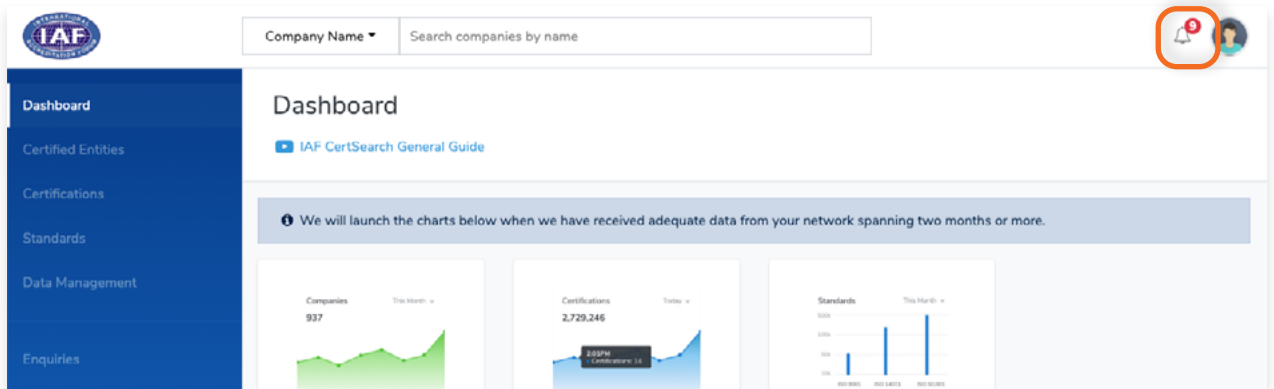
Click **Resolve Enquiry**. This will change the status of your enquiry from Open to Resolved.

The screenshot shows the 'Enquiry for CB' detail page. At the top right, there is a 'Resolve Enquiry' button (highlighted with an orange box). Below this, the enquiry details are displayed: 'Body Certification' (Ken Johnston), 'Enquiry for CB', and 'Enquiring about Certification Body'. The status is 'Open' with a timestamp of '2019-09-16 09:18'. A chat window is visible at the bottom, showing a message from the user: 'How can we help you?' and a text input field with the placeholder 'Type reply here...'.



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.

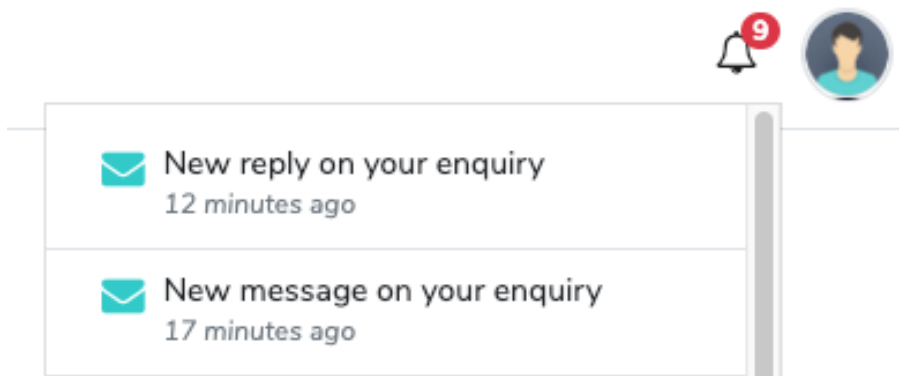


This icon will show you the number pending notifications.



Step 1

Click the Icon and the notifications will be shown.



Step 2

Click on a specific notification to resolve or respond.

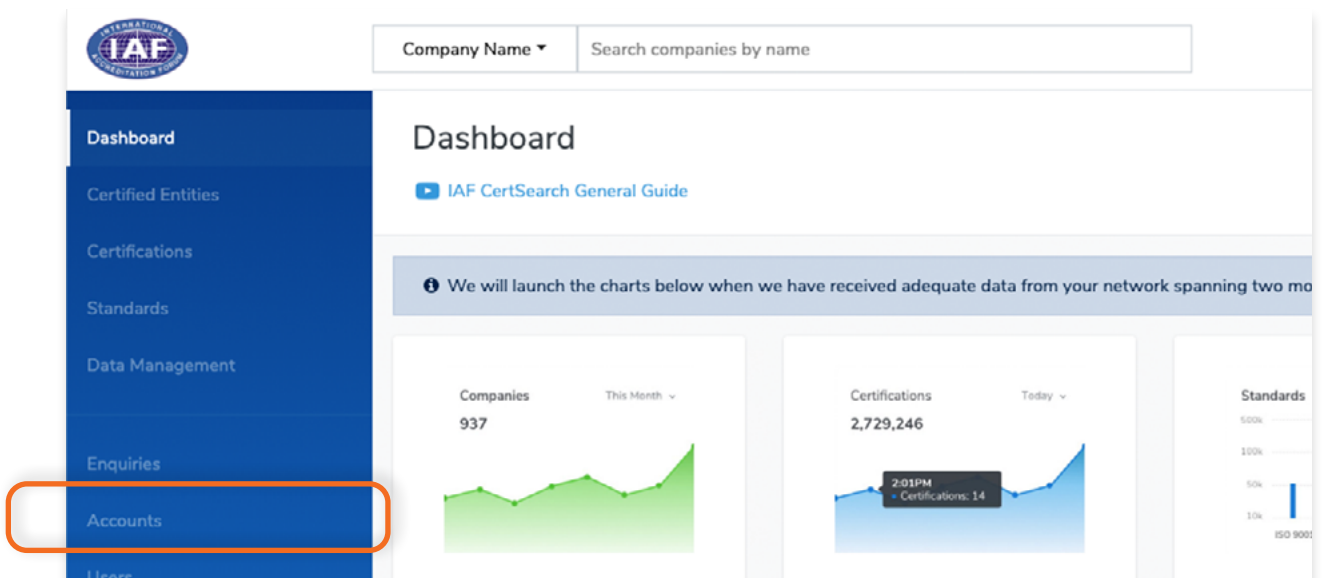
8. Accounts

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**.

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... [+ Add Account](#)

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



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

Best Practice Certification

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

Account Details

Status [Edit](#)

Account Status: Active

Location [Edit](#)

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

Economy/Country: Australia

Address: Suite 2, Level 2, 122-125 Old Pittwater Road Epping NSW 2130

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: iaf@iaf.org

Key Contact Name: Vincent BestPractice

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

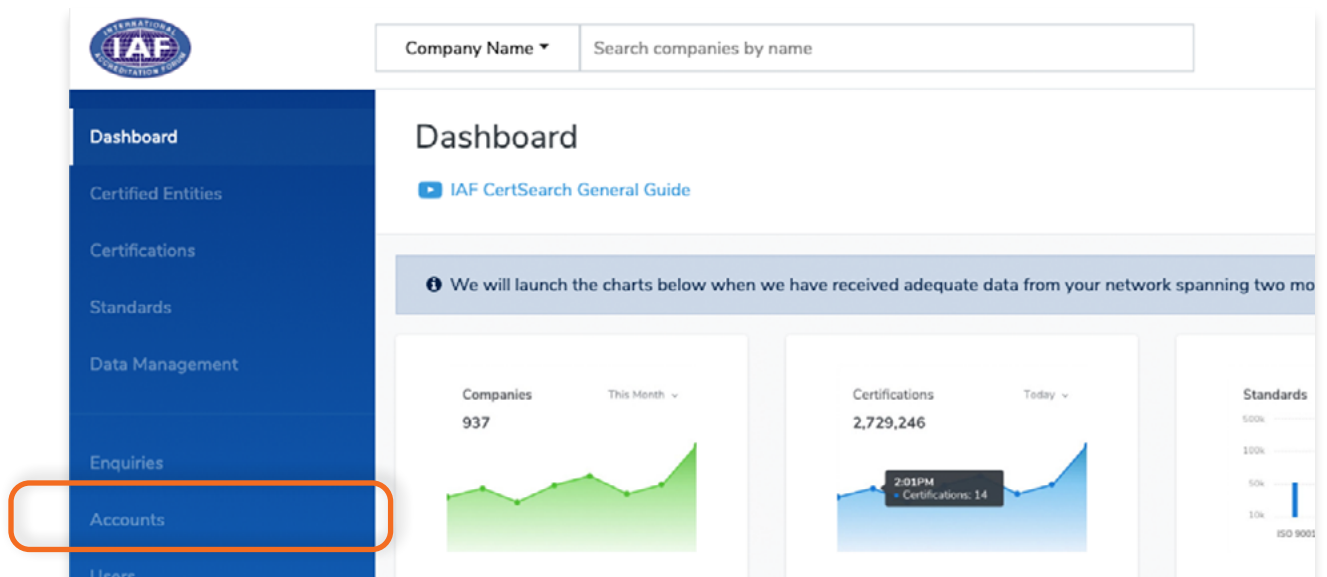
8.2 How to Change Account Details

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.



The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, **Accounts** (highlighted with an orange box), and Users. The main content area features a search bar for 'Company Name' and a 'Dashboard' title. Below the title is a video player for 'IAF CertSearch General Guide'. A notification banner states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. Three charts are displayed: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001).

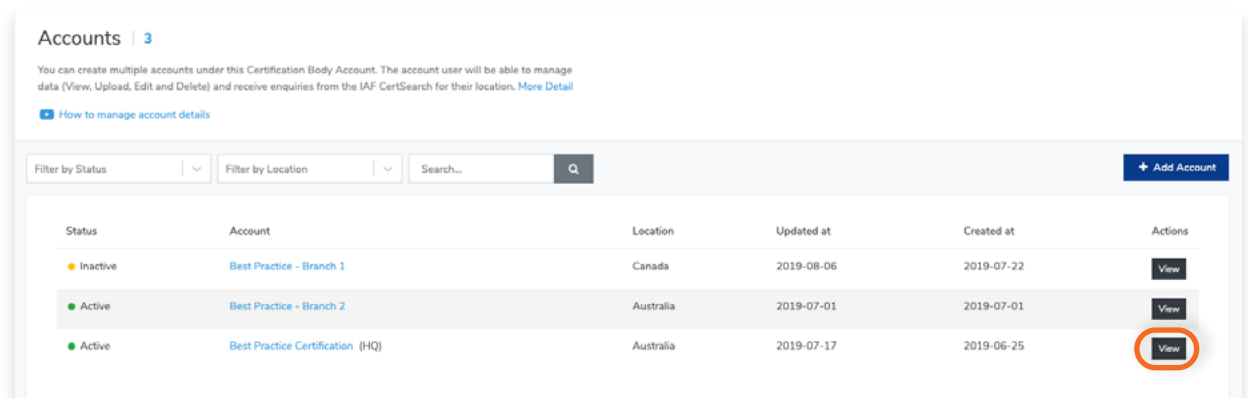
Here you can view the list of your current accounts.

Step 2

Find the account you want to edit.

Step 3

Click **View**.

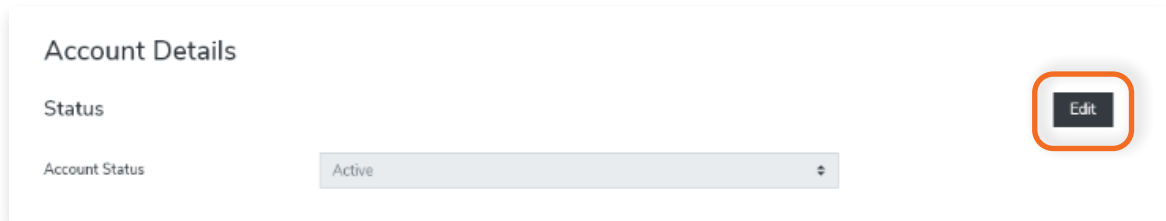


The screenshot shows the 'Accounts' page with a header 'Accounts | 3'. Below the header is a descriptive paragraph and a link 'How to manage account details'. The main content is a table with columns: Status, Account, Location, Updated at, Created at, and Actions. The table contains three rows. The 'View' button for the 'Best Practice Certification (HQ)' account is circled in orange.

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

Step 4

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



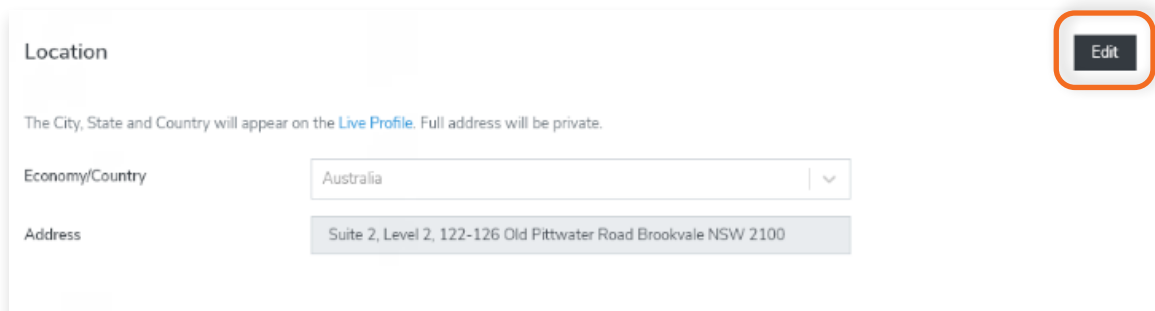
The screenshot shows a white card titled "Account Details". Under the "Status" heading, there is a dropdown menu labeled "Account Status" with "Active" selected. To the right of the dropdown is a dark grey button with the text "Edit" in white. This button is highlighted with a hand-drawn orange circle.

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**.

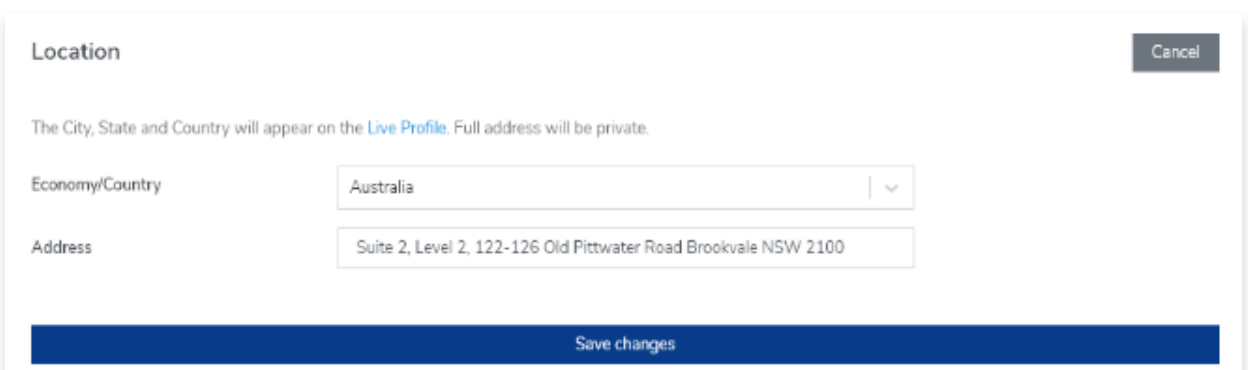


The screenshot shows a white card titled "Location". Below the title is a note: "The City, State and Country will appear on the [Live Profile](#). Full address will be private." There are two input fields: "Economy/Country" with a dropdown menu showing "Australia" and "Address" with a text box containing "Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100". A dark grey button with the text "Edit" in white is located in the top right corner of the card and is circled in orange.

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.



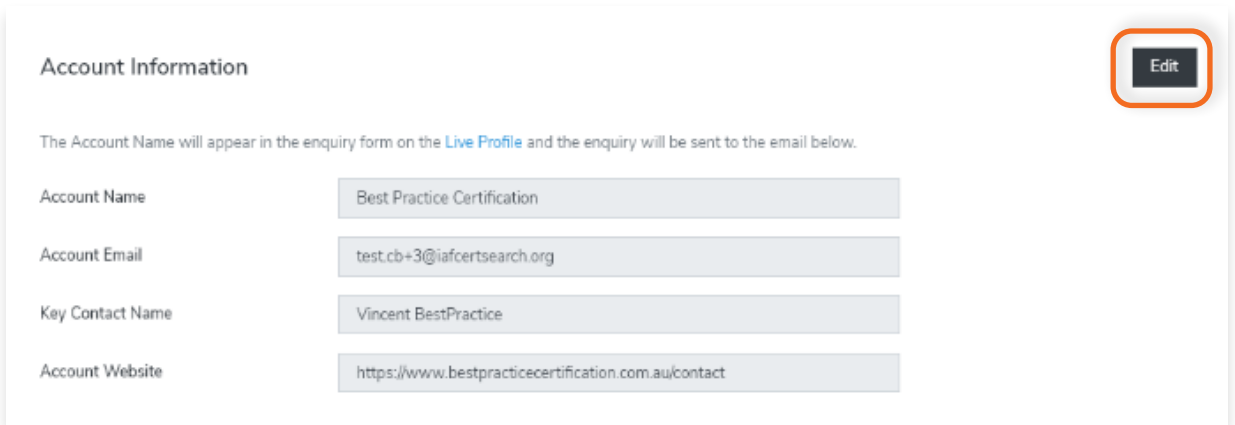
This screenshot is similar to the previous one, showing the "Location" section. However, the "Edit" button is no longer visible. Instead, a dark blue button with the text "Save changes" in white is positioned at the bottom center of the card. A dark grey button with the text "Cancel" in white is visible in the top right corner.

Step 8

Click **Save changes**.

Step 9

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

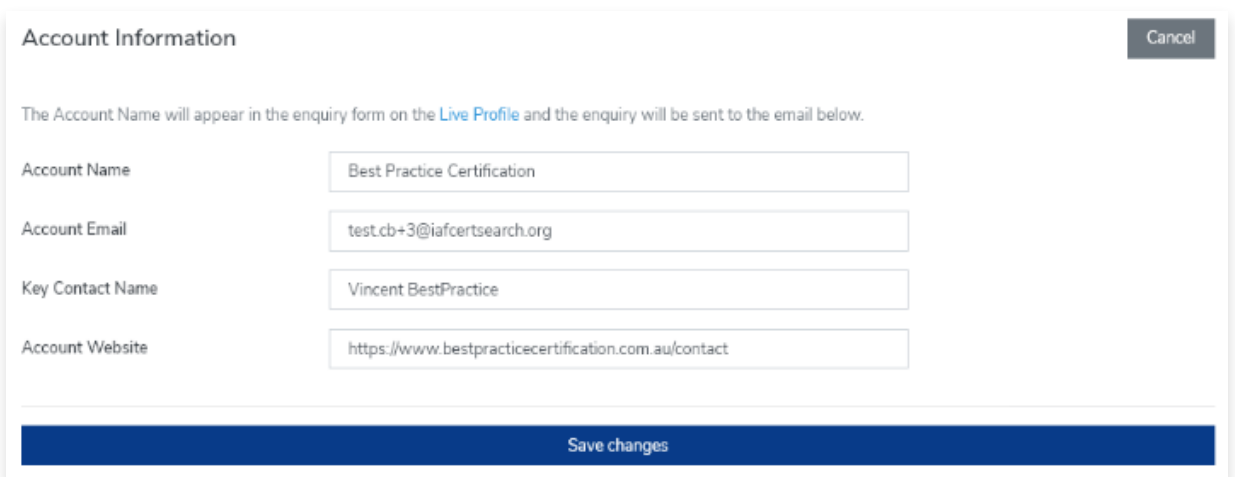


The screenshot shows a form titled "Account Information". At the top right, there is a button labeled "Edit" which is highlighted with a red rectangular border. Below the title, there is a note: "The Account Name will appear in the enquiry form on the [Live Profile](#) and the enquiry will be sent to the email below." The form contains four input fields:

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

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.



The screenshot shows the same "Account Information" form as in Step 9. At the top right, there is a "Cancel" button. At the bottom of the form, there is a prominent blue button labeled "Save changes".

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/NhiP4ljo5X0>

Step 1

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

The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, **Accounts** (highlighted with an orange box), and Users. The main content area has a search bar for 'Company Name' and a video player 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 mo'. Three charts are displayed: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001).

Step 2

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

The screenshot shows the 'Accounts' page. At the top, it says 'Accounts | 3'. Below this is a description: '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](#)'. There is a link for 'How to manage account details'. Below the description are filters for 'Filter by Status' and 'Filter by Location', and a search bar. In the top right corner, a '+ Add Account' button is highlighted with an orange box. Below the filters is a table with the following data:

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

Step 3

Enter Location and Account Information.

The screenshot shows a web form titled "Add Account" with a breadcrumb "Accounts / Add Account". The form is divided into two main sections: "Account Details" and "Account Information".

Account Details

Location

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

Economy/Country: United States (dropdown menu)

Address: Address (text input field)

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 Name (text input field)

Account Email: Account Email (text input field)

Key Contact Name: Key Contact Name (text input field)

Account Website: Account Website (text input field)

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 (blue button)

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.



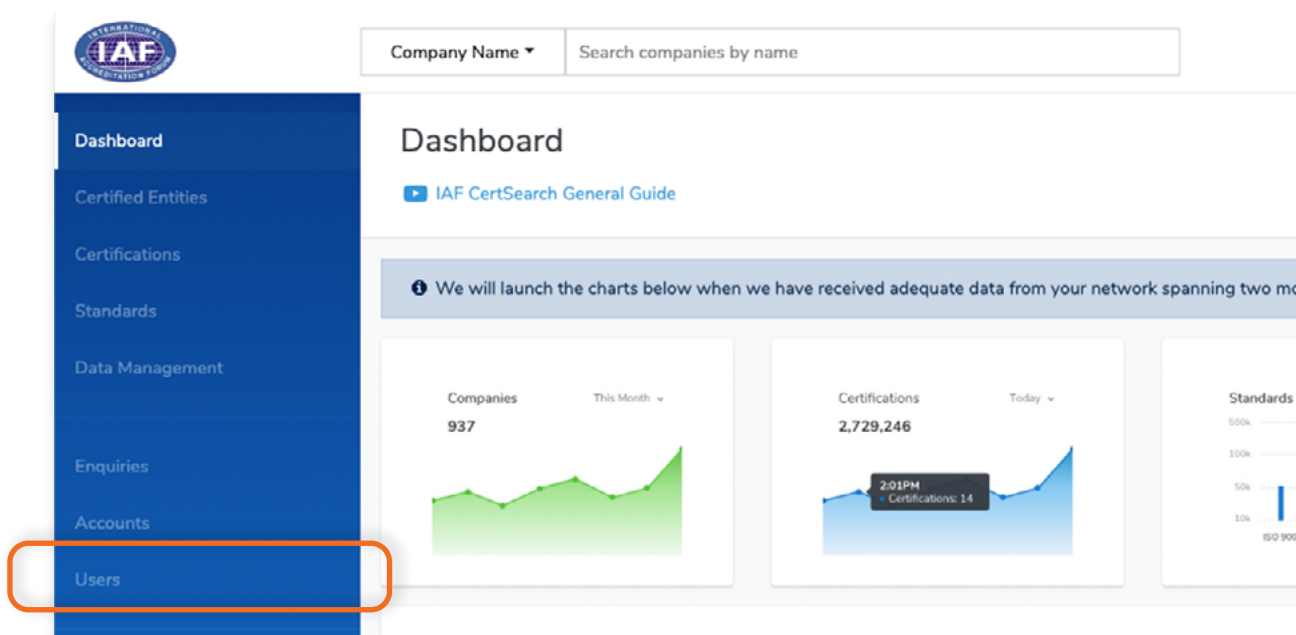
9. Users

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

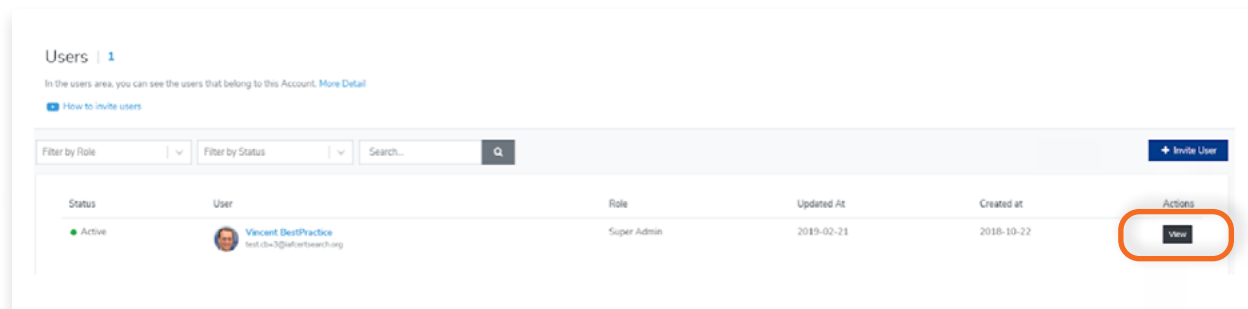
From the Dashboard, click **Users** in the left hand navigation.



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

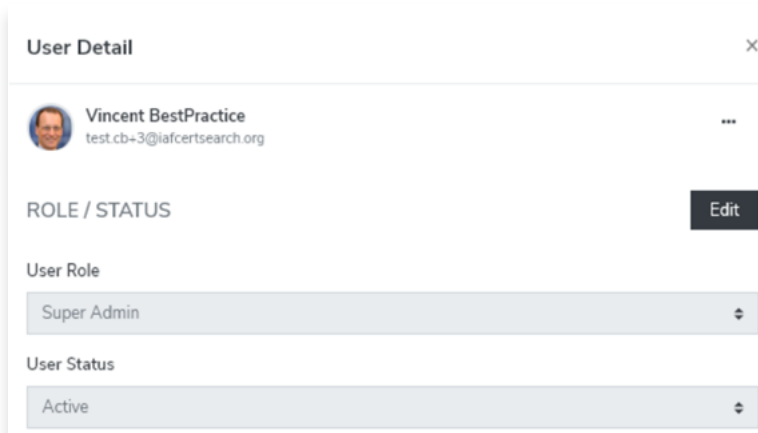
Step 2

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



Step 3

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



The screenshot shows a 'User Detail' modal window with the following content:

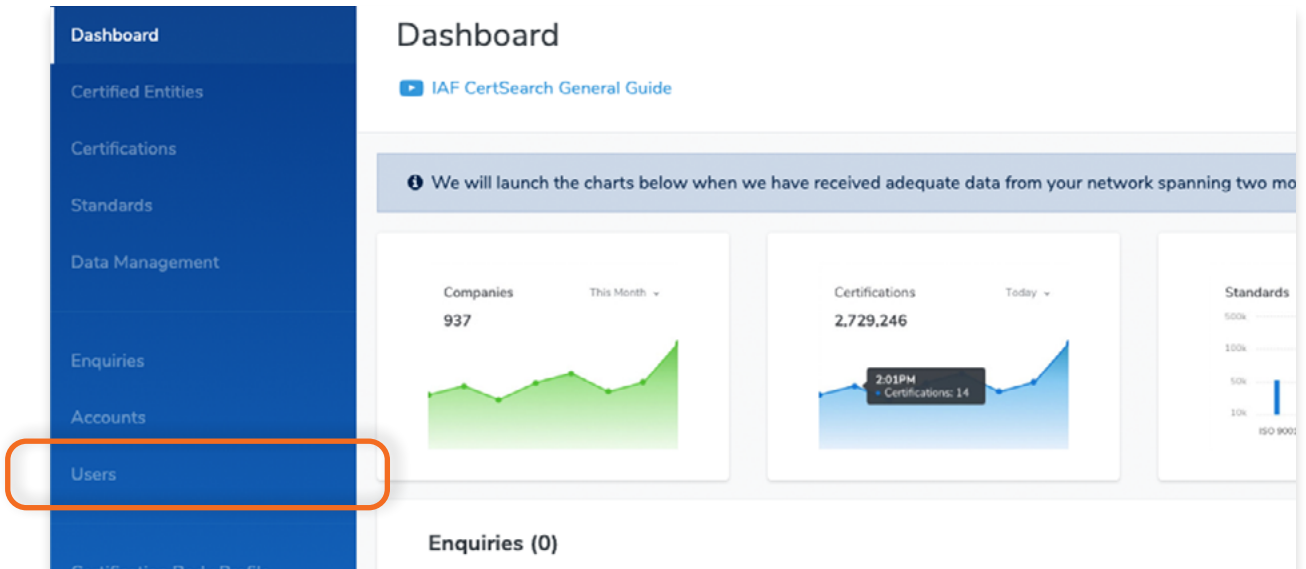
- User Detail** (title bar with a close button 'x')
- User profile: Vincent BestPractice, test.cb+3@iafcertsearch.org
- ROLE / STATUS** section with an **Edit** button
- User Role** dropdown menu showing 'Super Admin'
- User Status** dropdown menu showing 'Active'



9.2 How to Edit a User

Step 1

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



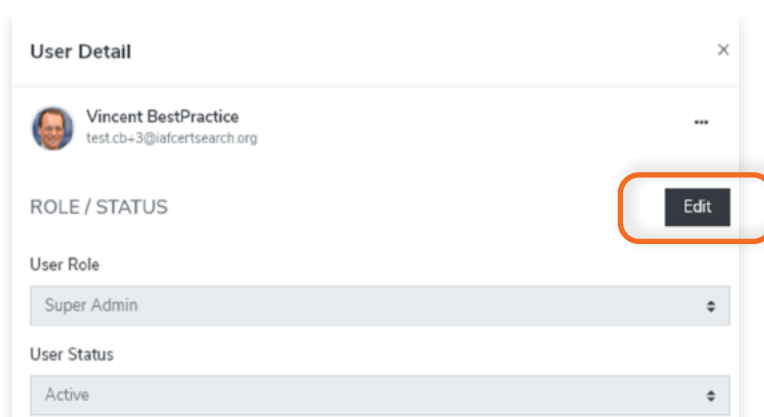
Step 2

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



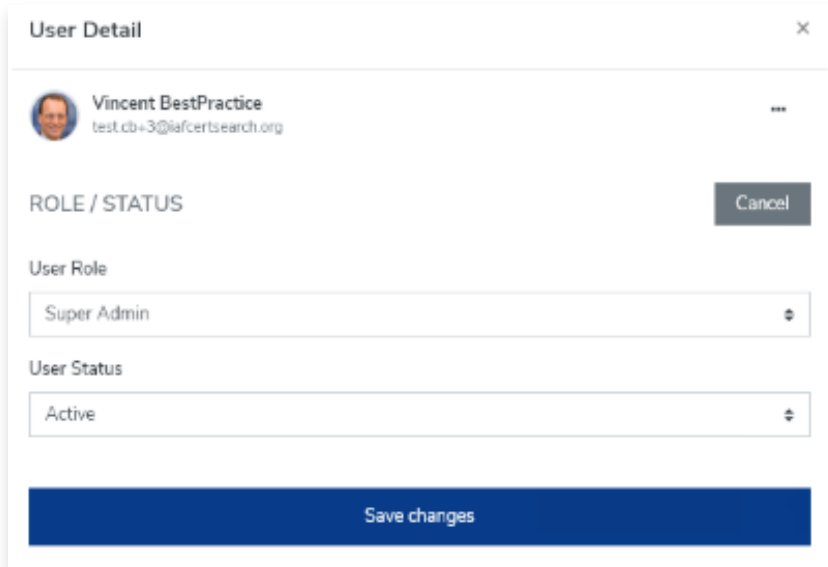
Step 3

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.



The image shows a 'User Detail' dialog box for a user named Vincent BestPractice. The dialog contains the following elements:

- User Profile:** A circular profile picture, the name 'Vincent BestPractice', and the email address 'test.cb+3@lafcertsearch.org'. A three-dot menu icon is visible to the right.
- ROLE / STATUS:** A section header with a 'Cancel' button to its right.
- User Role:** A dropdown menu currently displaying 'Super Admin'.
- User Status:** A dropdown menu currently displaying 'Active'.
- Save changes:** A large blue button at the bottom of the dialog.

Step 5

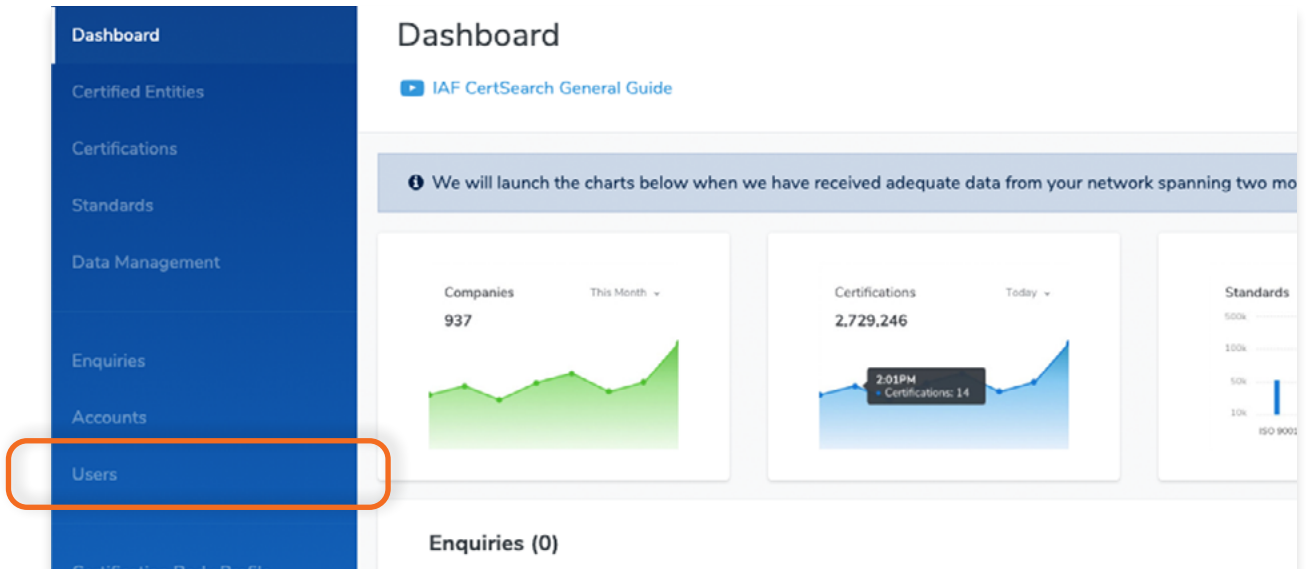
Click **Save changes** once done or click **Cancel** to revert any changes.



9.3 How to Delete a User

Step 1

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



The screenshot shows a dashboard with a left-hand navigation menu. The 'Users' menu item is highlighted with an orange box. The dashboard content includes a 'Dashboard' header, a link to 'IAF CertSearch General Guide', a notification banner, and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' section.

Step 2

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

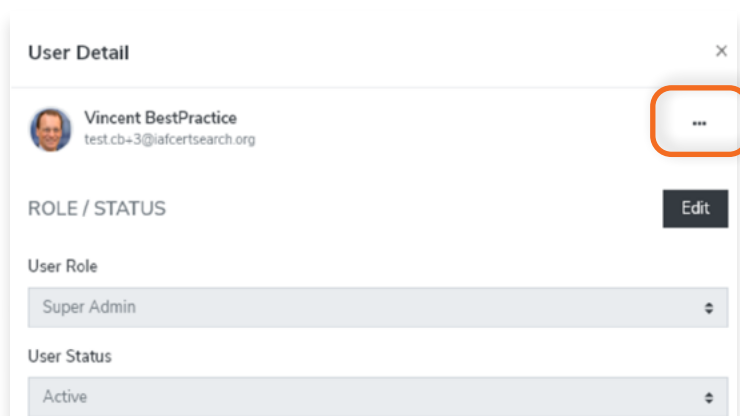


The screenshot shows the 'Users' page with a table containing one user entry. The table has columns for Status, User, Role, Updated At, Created at, and Actions. The user entry is for Vincent BestPractice, Super Admin, updated on 2019-02-21, created on 2018-10-22, and has a 'View' button in the Actions column.

Status	User	Role	Updated At	Created at	Actions
Active	 Vincent BestPractice test.cb+3@iafcertsearch.org	Super Admin	2019-02-21	2018-10-22	View

Step 3

Click on the options icon "... " and follow the prompts.



The screenshot shows the 'User Detail' modal for Vincent BestPractice. The modal includes a profile picture, name, and email. Below this is the 'ROLE / STATUS' section with an 'Edit' button. The 'User Role' is set to 'Super Admin' and the 'User Status' is set to 'Active'. The options icon '...' is highlighted with an orange box.



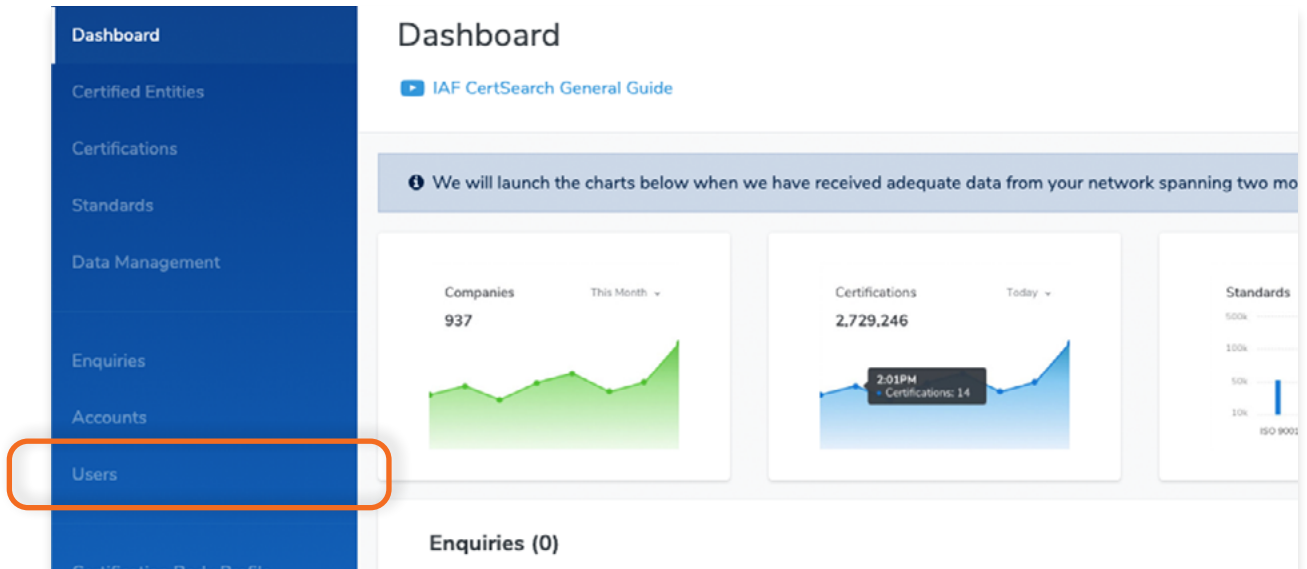
9.4 How to Invite a New User

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

<https://www.youtube.com/watch?v=clvJ4Gqaz6s>

Step 1

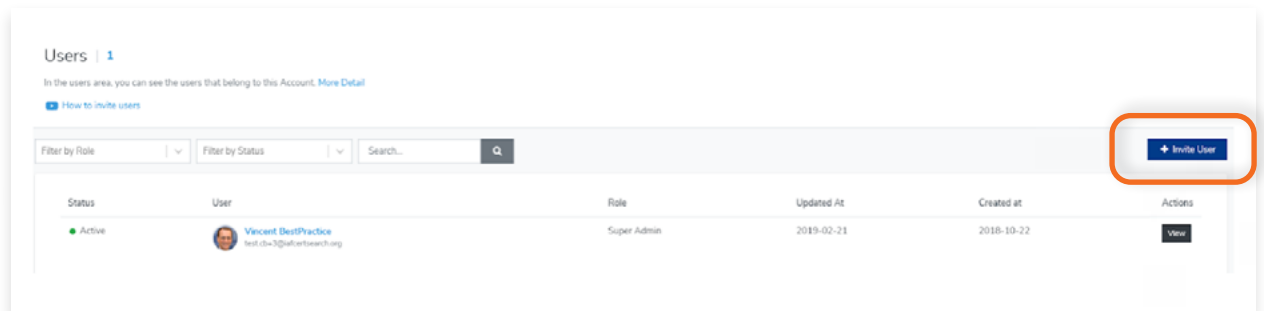
From the Dashboard, click **Users** in the left hand navigation.



The screenshot shows a dashboard with a left-hand navigation menu. The 'Users' menu item is highlighted with an orange box. The main content area displays several charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. A notification banner at the top states: 'We will launch the charts below when we have received adequate data from your network spanning two mo...'. Below the charts, there is an 'Enquiries (0)' section.

Step 2

Click **+ Invite User**.

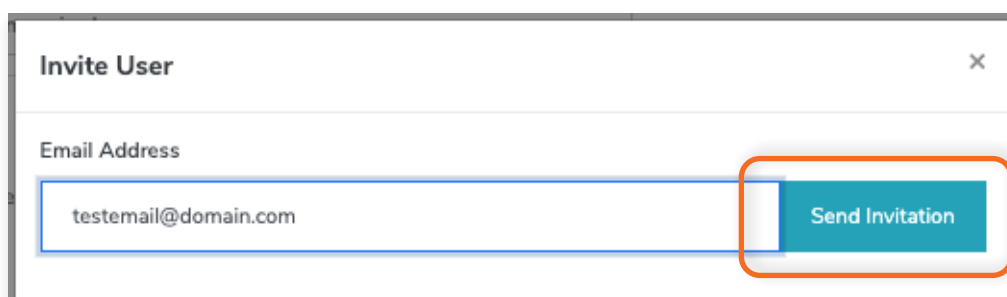


The screenshot shows the 'Users' page with a table of users. The '+ Invite User' button is highlighted with an orange box. The table has columns for Status, User, Role, Updated At, Created at, and Actions. One user is listed with the role 'Super Admin'.

Status	User	Role	Updated At	Created at	Actions
Active	Vincent BestPractice test.cb@4iersearch.org	Super Admin	2019-02-21	2018-10-22	View

Step 3

Enter an Email Address and click on Send Invitation



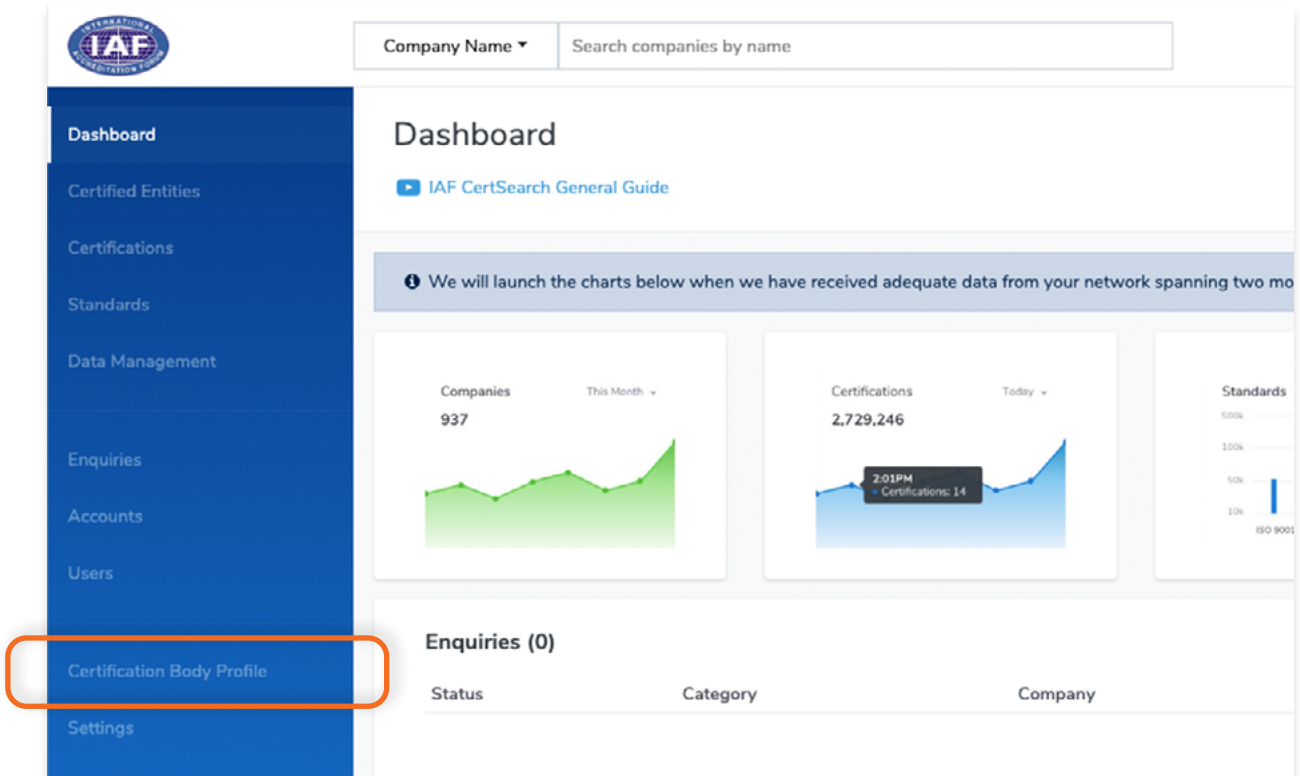
The screenshot shows a dialog box titled 'Invite User'. It has a text input field for 'Email Address' containing 'testemail@domain.com'. The 'Send Invitation' button is highlighted with an orange box.



10. Certification Body Profile

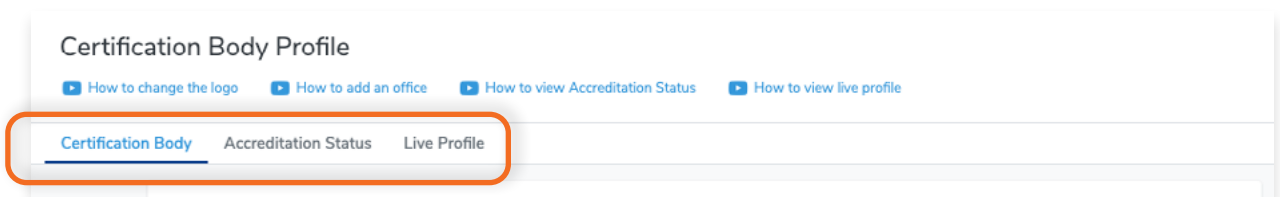
10.1 How to View Certification Body Information

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.



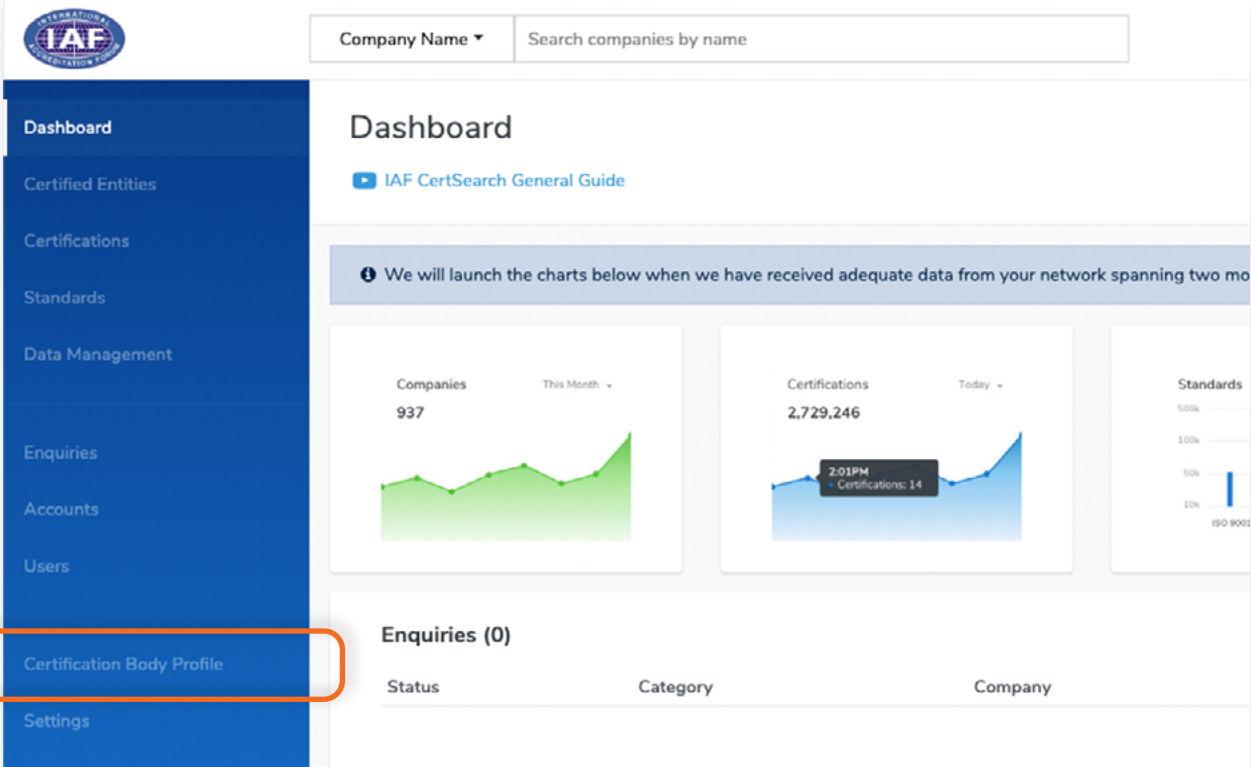
10.2 How to Edit Certification Body Logo

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

How to change your Logo: <https://www.youtube.com/watch?v=SCDzZzIBQT8>

Step 1

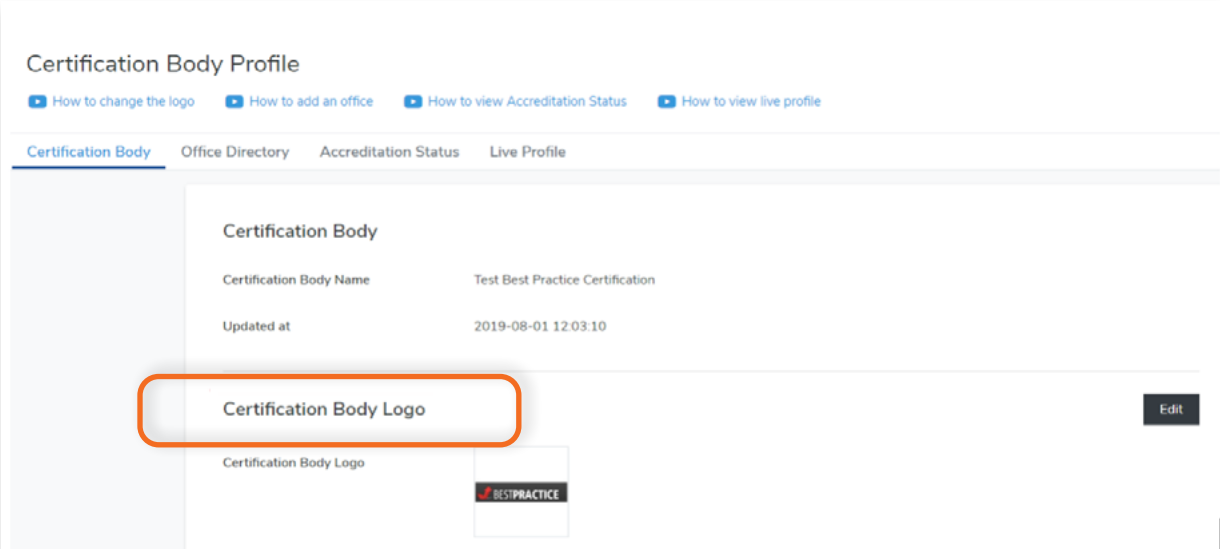
From the Dashboard, click **Certification Body Profile** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists several options: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, **Certification Body Profile** (highlighted with an orange box), and Settings. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name'. Below the search bar, there are three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. A table titled 'Enquiries (0)' is also visible, with columns for Status, Category, and Company.

Step 2

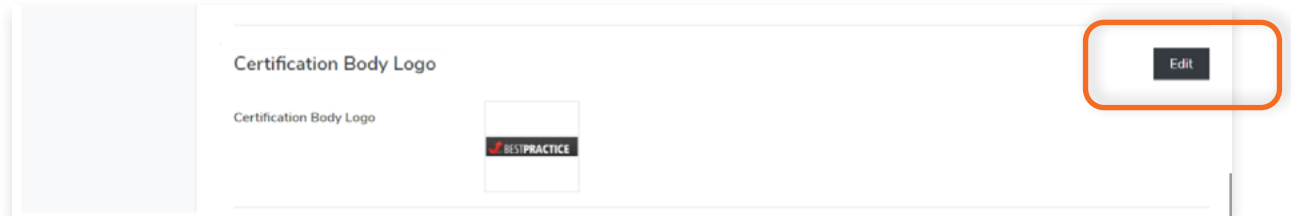
Select **Certification Body** in the top menu bar and scroll to the Certification Body Logo section.



The screenshot shows the 'Certification Body Profile' page. The top navigation bar includes 'Certification Body', 'Office Directory', 'Accreditation Status', and 'Live Profile'. The 'Certification Body' section is active. Below this, the 'Certification Body' details are shown: 'Certification Body Name' is 'Test Best Practice Certification' and 'Updated at' is '2019-08-01 12:03:10'. The 'Certification Body Logo' section is highlighted with an orange box, showing a logo for 'BESTPRACTICE' and an 'Edit' button.

Step 4

Click **Edit**.



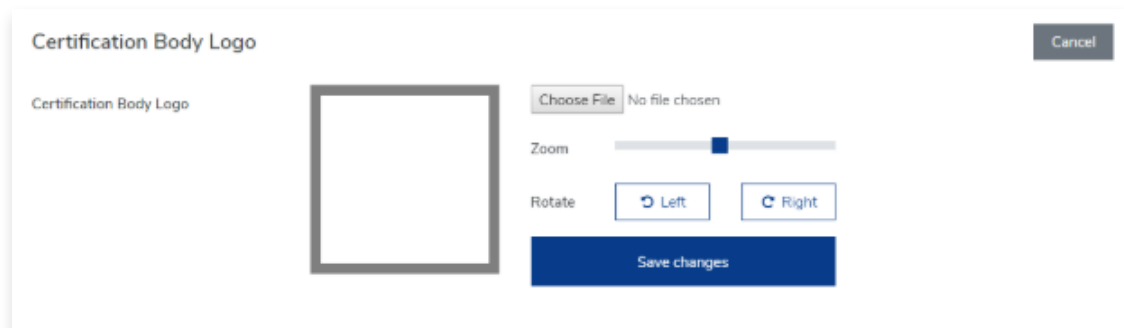
Step 5

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

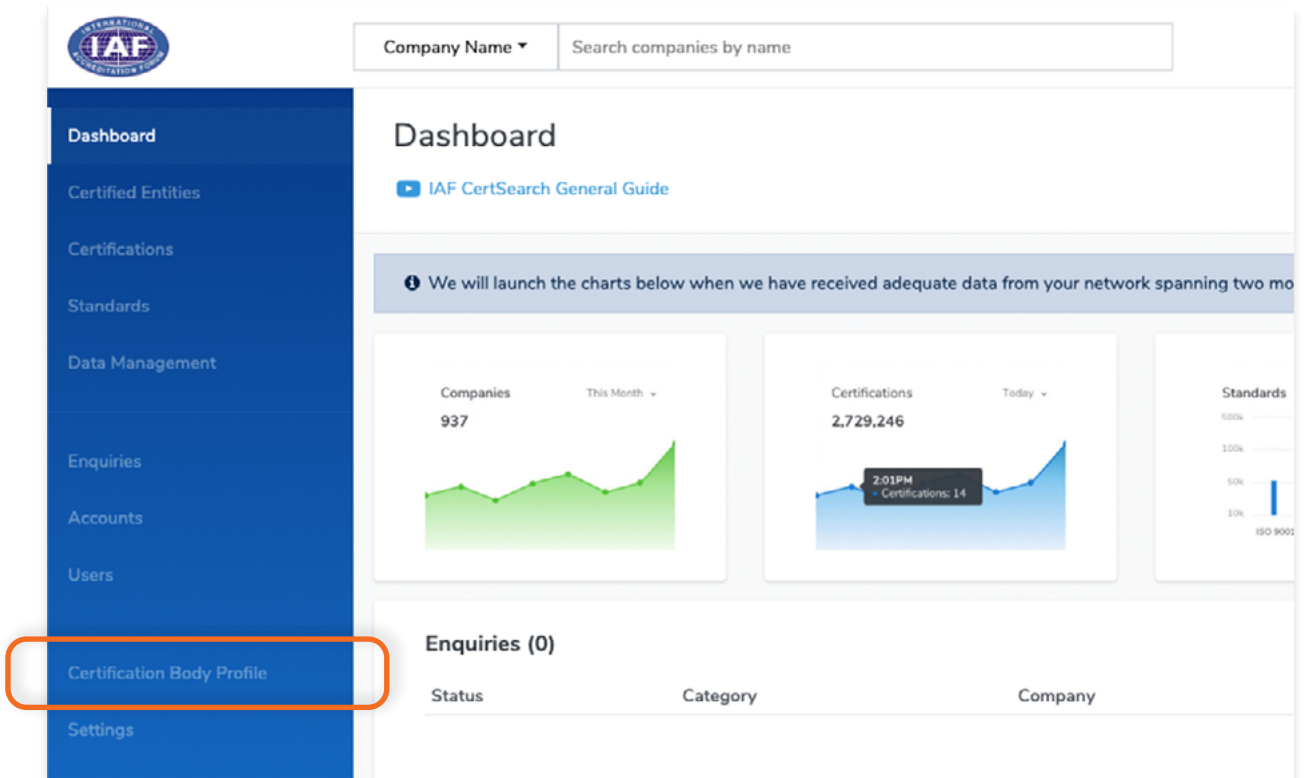
Click **Save Changes** once done or click **Cancel** to revert changes.



10.3 How to Edit Certification Body Economy/Country

Step 1

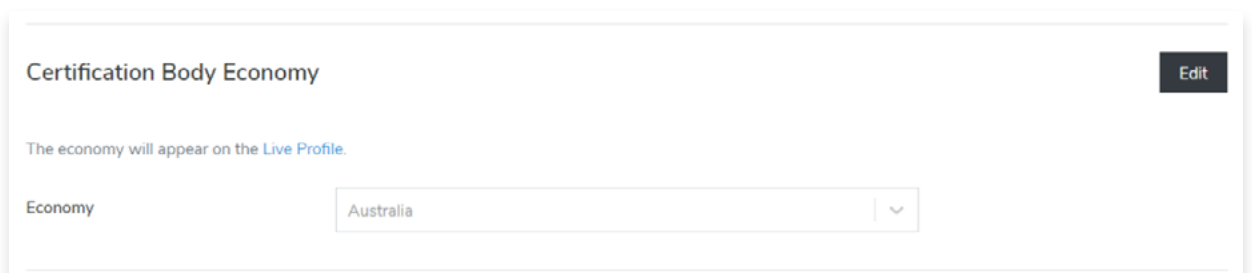
From the Dashboard, click **Certification Body Profile** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile (highlighted with an orange box), and Settings. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a link to 'IAF CertSearch General Guide', and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is a section for 'Enquiries (0)' with a table header: Status, Category, Company.

Step 2

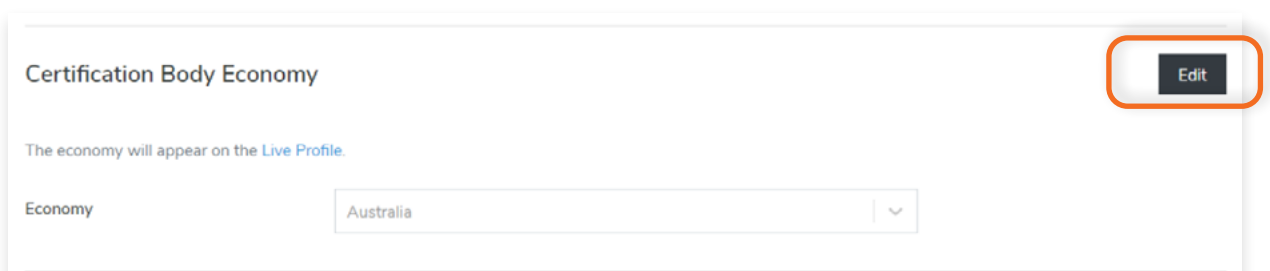
Select **Certification Body** in the top menu bar and scroll to the Certification Body Economy section.



The screenshot shows the 'Certification Body Economy' section. It features a title 'Certification Body Economy' and an 'Edit' button in the top right corner. Below the title is a note: 'The economy will appear on the Live Profile.' Underneath, there is a label 'Economy' and a dropdown menu currently showing 'Australia'.

Step 3

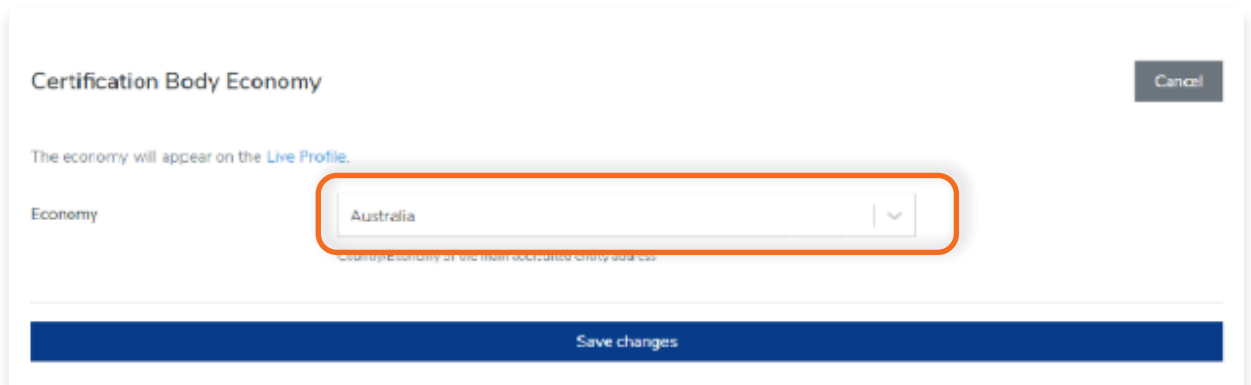
Click Edit



This screenshot is identical to the one in Step 2, showing the 'Certification Body Economy' section with the 'Edit' button highlighted by an orange box.

10.3. How to Edit Certification Body Logo

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

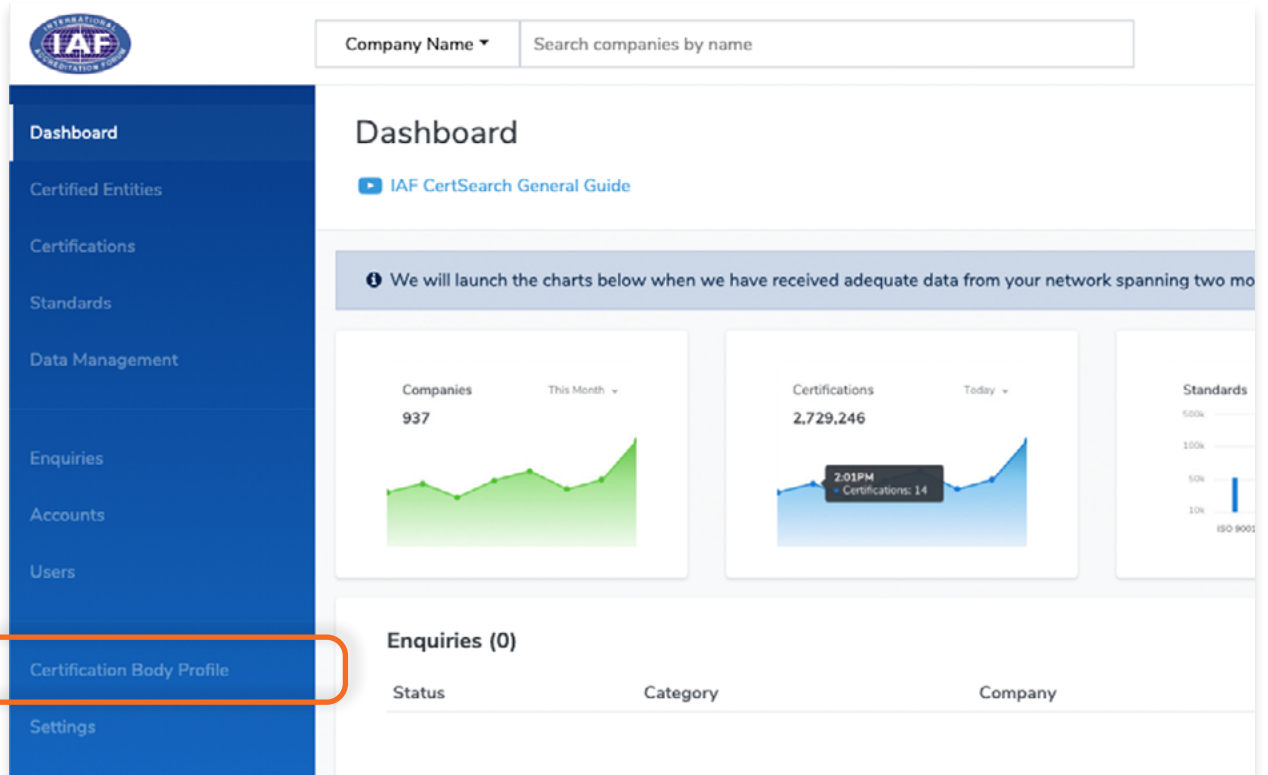
Click **Save Changes** to save.



10.4 How to Edit Certification Body Information

Step 1

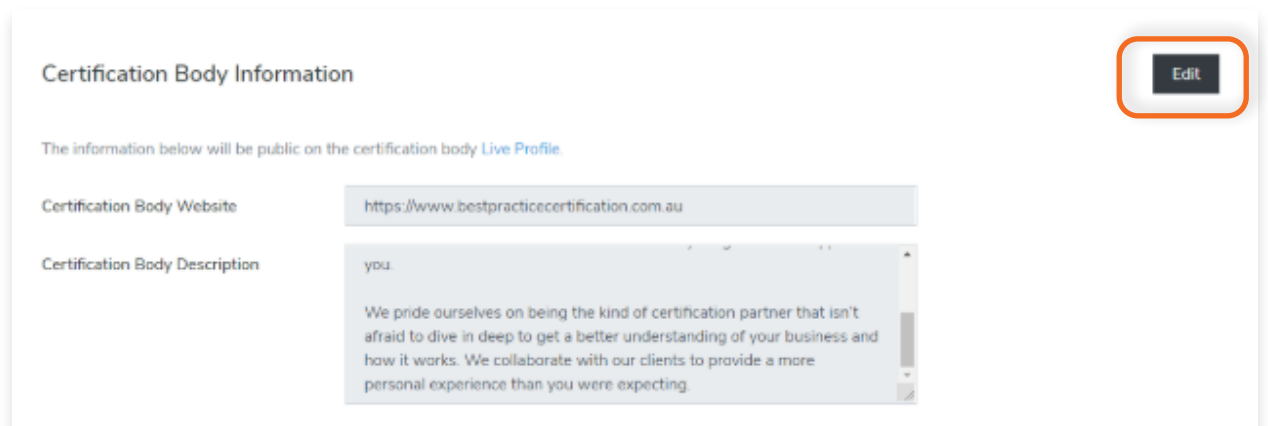
From the Dashboard, click **Certification Body Profile** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile (highlighted with an orange box), and Settings. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a link to 'IAF CertSearch General Guide', and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is a section for 'Enquiries (0)' with columns for Status, Category, and Company.

Step 2

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



The screenshot shows the 'Certification Body Information' page. At the top right, there is an 'Edit' button highlighted with an orange box. Below the title, a note states: 'The information below will be public on the certification body Live Profile.' There are two input fields: 'Certification Body Website' with the value 'https://www.bestpracticecertification.com.au' and 'Certification Body Description' with the text 'you. We pride ourselves on being the kind of certification partner that isn't afraid to dive in deep to get a better understanding of your business and how it works. We collaborate with our clients to provide a more personal experience than you were expecting.'

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

Certification Body Information

Cancel

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

Certification Body Website
Certification Body Website must start with http:// or https://

Certification Body 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 CR will have the ability to edit the description in their IAF CertSearch dashboard. If the CR does not have this information then leave it blank.

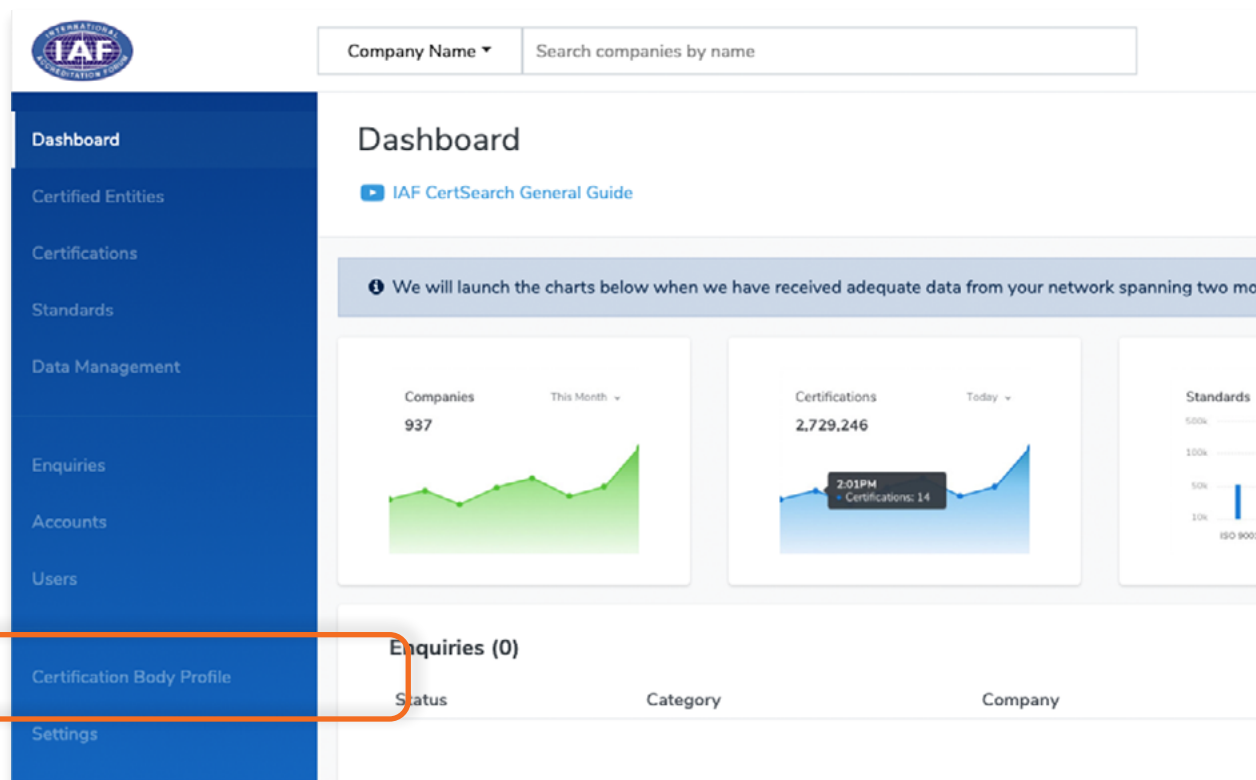
Save changes



10.5 How to Edit Certification Body Private Information

Step 1

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



The screenshot shows the IAF CertSearch Dashboard. The left navigation menu is highlighted with a blue bar, and 'Certification Body Profile' is circled in orange. The main content area shows a dashboard with various charts and a table for Enquiries (0).

Company Name ▾ Search companies by name

Dashboard

IAF CertSearch General Guide

We will launch the charts below when we have received adequate data from your network spanning two mo

Companies	This Month ▾
937	

Certifications	Today ▾
2,729,246	

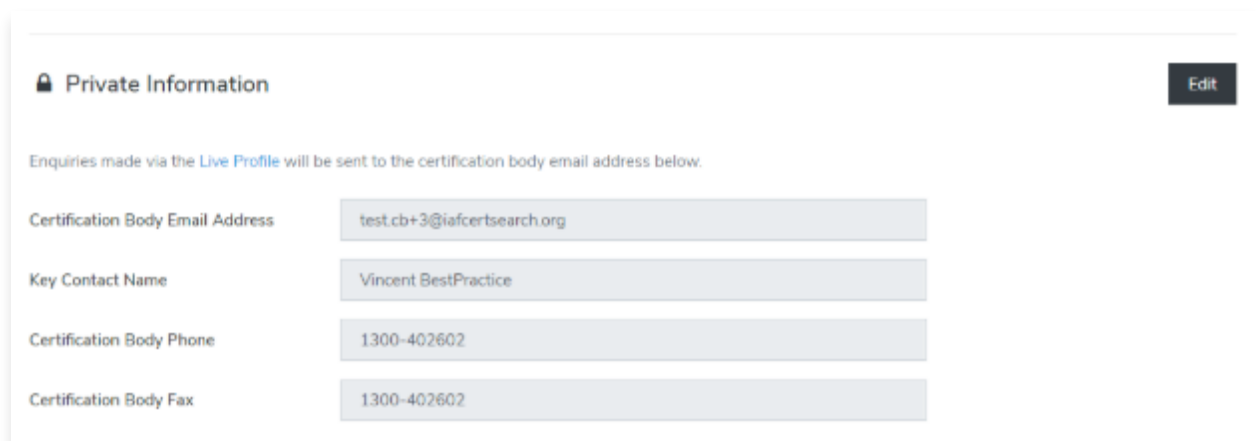
Standards
50k
100k
50k
10k
ISO 9001

Enquiries (0)

Status	Category	Company
--------	----------	---------

Step 2

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



Private Information Edit

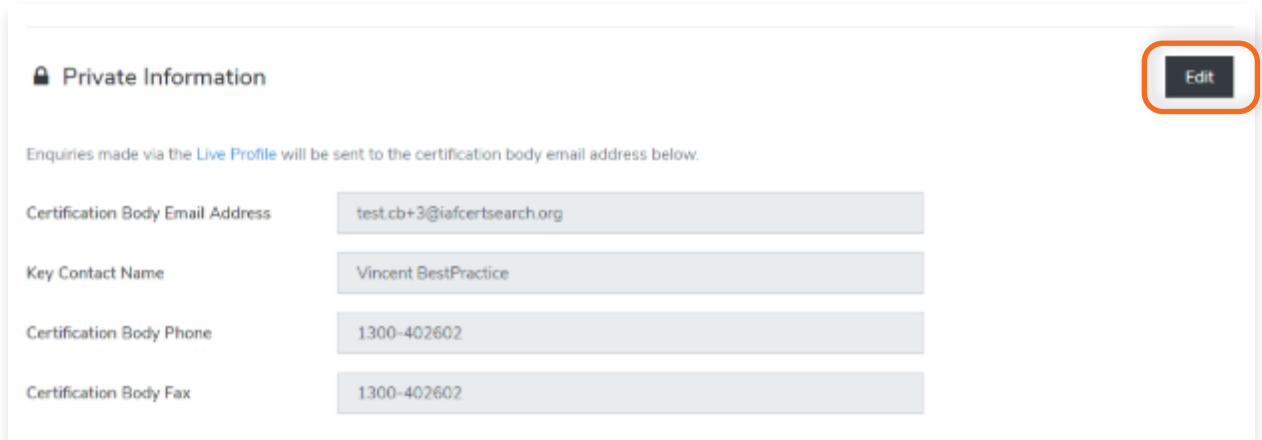
Enquiries made via the [Live Profile](#) will be sent to the certification body email address below.

Certification Body Email Address	test.cb+3@iafcertsearch.org
Key Contact Name	Vincent BestPractice
Certification Body Phone	1300-402602
Certification Body Fax	1300-402602

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.



Private Information Edit

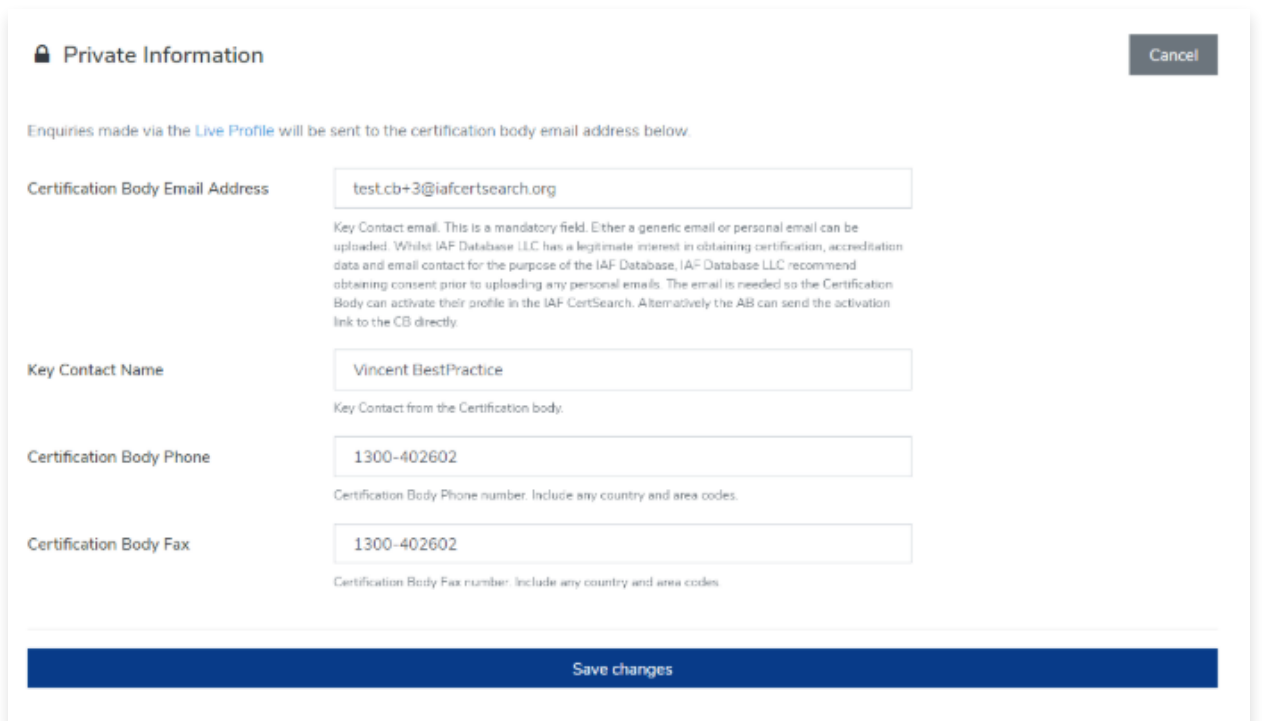
Enquiries made via the [Live Profile](#) will be sent to the certification body email address below.

Certification Body Email Address	test.cb+3@iafcertsearch.org
Key Contact Name	Vincent BestPractice
Certification Body Phone	1300-402602
Certification Body Fax	1300-402602

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**.



Private Information Cancel

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

Certification Body Email Address	test.cb+3@iafcertsearch.org
----------------------------------	-----------------------------

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.

Key Contact Name	Vincent BestPractice
------------------	----------------------

Key Contact from the Certification body:

Certification Body Phone	1300-402602
--------------------------	-------------

Certification Body Phone number. Include any country and area codes.

Certification Body Fax	1300-402602
------------------------	-------------

Certification Body Fax number. Include any country and area codes.

Save changes



10.6 How to View Accreditation Status

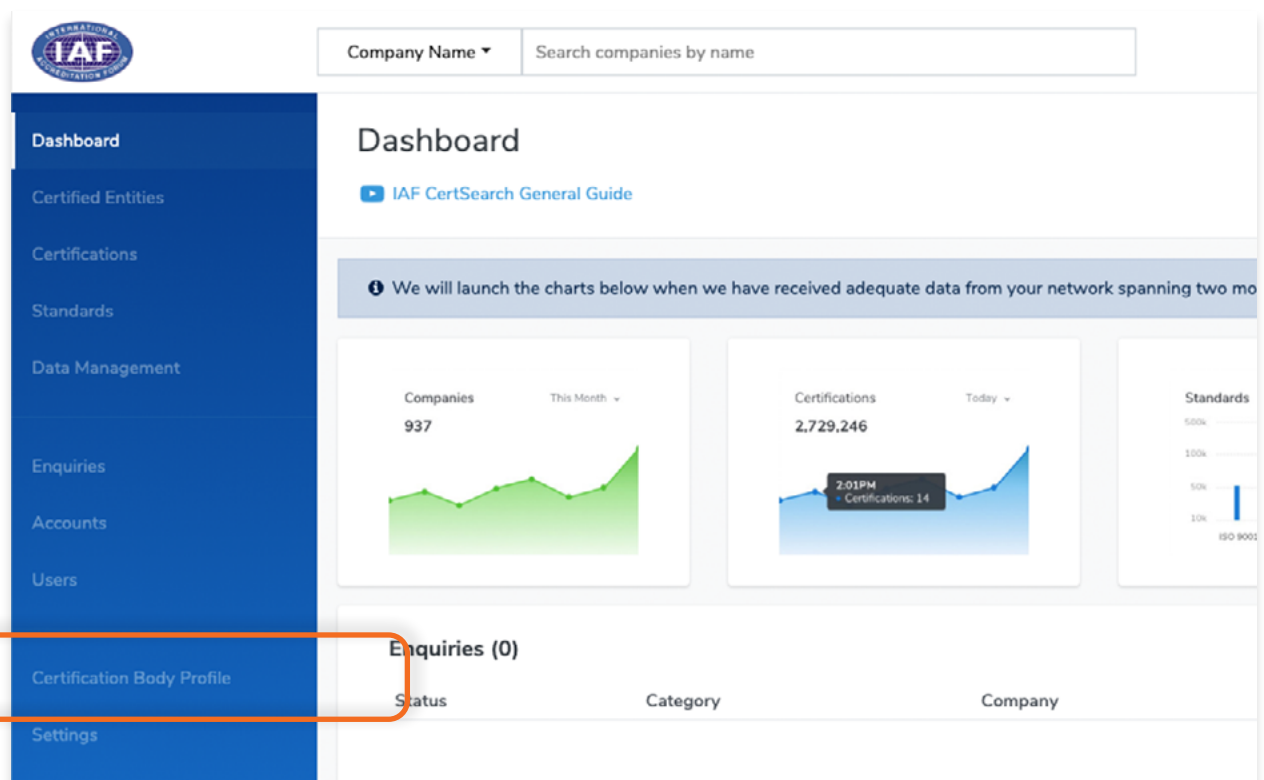
View the step by step guide below or watch the video guide here:

<https://youtu.be/pbi457WDXGs>

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

Step 1

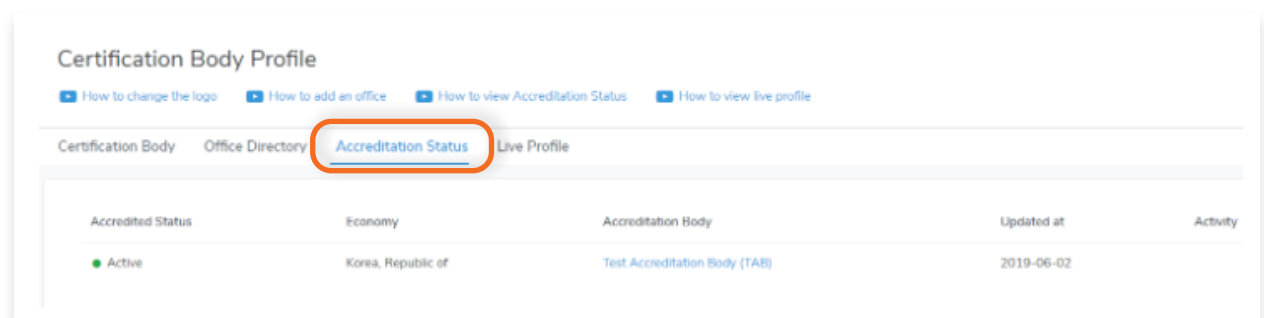
From the Dashboard, click **Certification Body Profile** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile (highlighted with an orange box), and Settings. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a link to 'IAF CertSearch General Guide', and a notification: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. There are three charts: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001). Below the charts is a table for 'Enquiries (0)' with columns for Status, Category, and Company.

Step 2

Click **Accreditation Status** in the menu bar



The screenshot shows the 'Certification Body Profile' page. At the top, there are four links: 'How to change the logo', 'How to add an office', 'How to view Accreditation Status' (highlighted with an orange box), and 'How to view live profile'. Below these links is a menu bar with four items: 'Certification Body', 'Office Directory', 'Accreditation Status' (highlighted with an orange box), and 'Live Profile'. The main content area is a table with the following data:

Accredited Status	Economy	Accreditation Body	Updated at	Activity
Active	Korea, Republic of	Test Accreditation Body (TAB)	2019-06-02	

The Accreditation status will be either Active, Suspended or Withdrawn. The Accreditation Body manages the Accreditation Status.

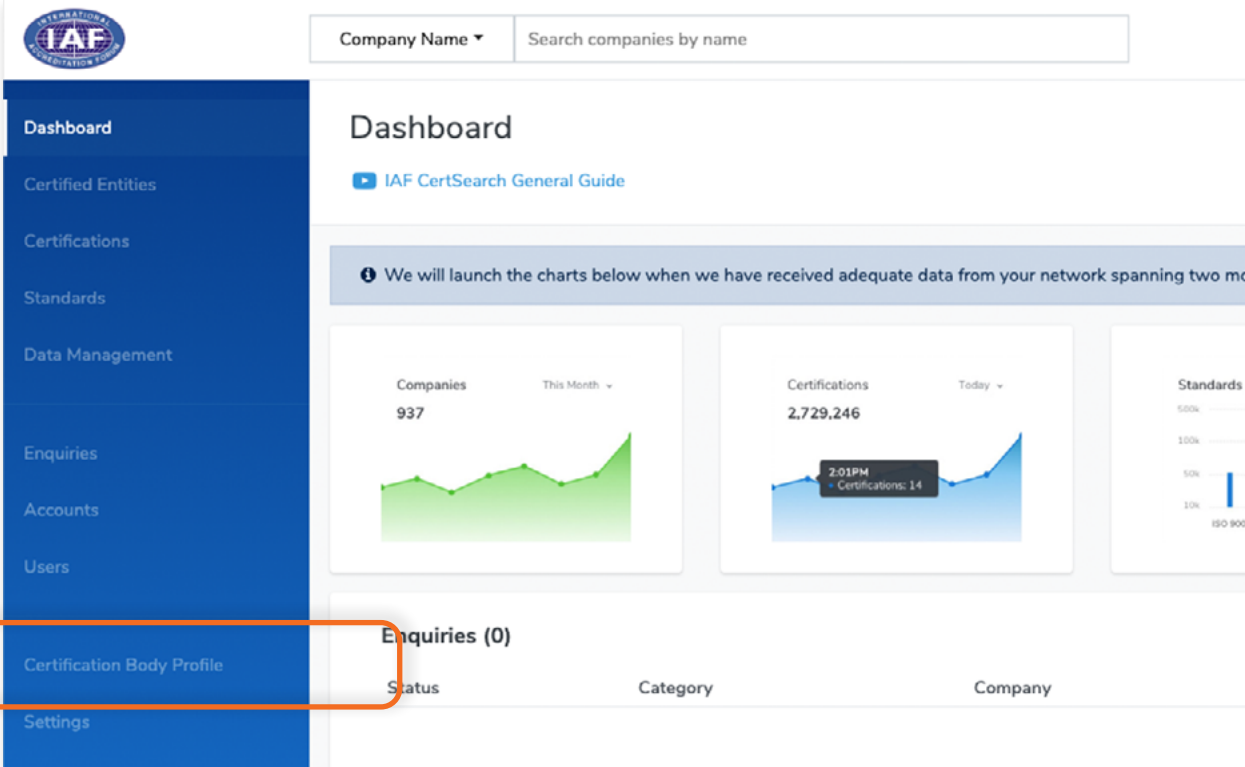
10.7 How to View Certification Body Profile

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

<https://www.youtube.com/watch?v=suzRG8cwK8M>

Step 1

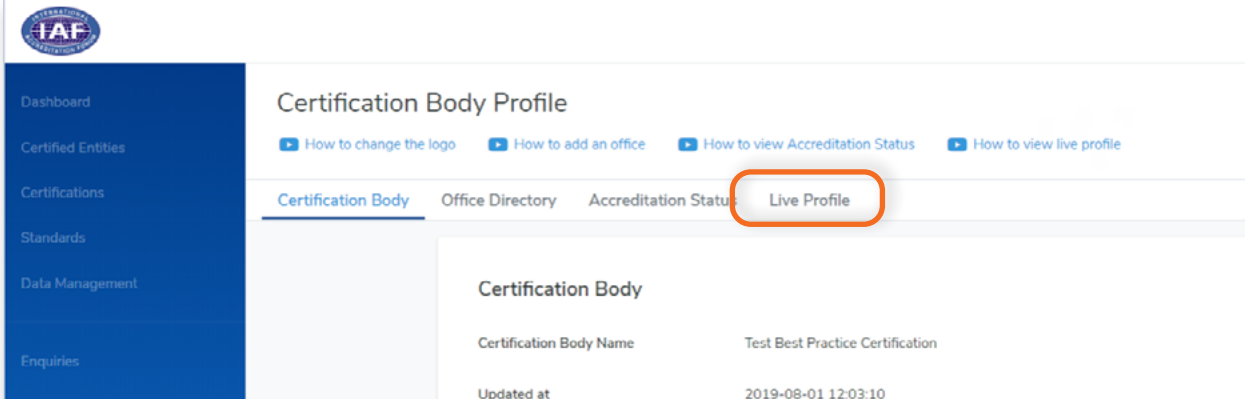
From the Dashboard, click **Certification Body Profile** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left, a blue navigation menu lists several options: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile (highlighted with an orange box), and Settings. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name'. Below the search bar, there are three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. A table titled 'Enquiries (0)' is also visible, with columns for Status, Category, and Company.

Step 2

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




The screenshot shows the 'Certification Body Profile' page. The left-hand navigation menu is visible, with 'Certification Body Profile' selected. The main content area has a title 'Certification Body Profile' and four links: 'How to change the logo', 'How to add an office', 'How to view Accreditation Status', and 'How to view live profile'. Below these links, there are four tabs: 'Certification Body', 'Office Directory', 'Accreditation Status', and 'Live Profile' (highlighted with an orange box). The 'Live Profile' tab displays the following information:


Certification Body	
Certification Body Name	Test Best Practice Certification
Updated at	2019-08-01 12:03:10




Certification Body Live Profile



Company Name



Certification Body



CB Test Profile

(CBTest)


Economy	Australia
----------------	-----------

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque mollis, nulla eu auctor euismod, lacus nunc facilisis leo, vel maximus nulla mi sed sem. Quisque justo sem, sagittis ut tortor ac, blandit cursus magna. Maecenas ultricies, elit aliquam mattis auctor, justo nibh finibus nisi, sed posuere est ante non turpis. Aliquam elementum eleifend metus sit amet malesuada. Sed aliquet nisi quam, vitae laoreet nunc convallis a. Morbi vel euismod justo. Vestibulum egestas mauris lorem, ut ultricies erat vestibulum id.

Sed ac molestie massa. Morbi et libero non metus convallis finibus vel non mi. Mauris non ultrices dui. Vestibulum aliquam, urna ut semper dignissim, enim mi maximus dolor, sit amet convallis mauris justo a purus. Proin facilisis, diam ac porta pharetra, diam metus condimentum ligula, quis pellentesque dui tortor a neque. Suspendisse sit amet malesuada purus. Curabitur pharetra orci in neque consequat, quis sagittis odio convallis. Phasellus condimentum, dolor non rutrum consectetur, arcu erat egestas elit, in mollis mi libero nec ex. Fusce a imperdiet ligula. Vestibulum consequat erat non congue efficitur. Quisque felis risus, tristique et egestas eu, mattis ac magna.

Accreditation Bodies



AB Profile (ABTest)

Office Directory (2)	Corporate Head Office	Australia
	Branch Office	Australia

Schemes and Standards

AB Profile	<ul style="list-style-type: none"> Management System Management System
Management System	<ul style="list-style-type: none"> Environmental Management Systems Scheme ISO 18001:2014

Dashboard

IAF CertSearch

International Accreditation Forum

Accreditation Bodies

Certification Bodies

Accredited Certifications

ISO Standard

Accreditation Bodies List

Certification Bodies List

QualityTrade




IAF Badge

Help

Contact

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Terms and Conditions Privacy Policy

Select Language

Powered by Google Translate

Contact us
Get in touch with this Certification Body

Subject

Enquiry Category

Certification Confirmation ▼

Enquiry

[Submit](#)

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](#)

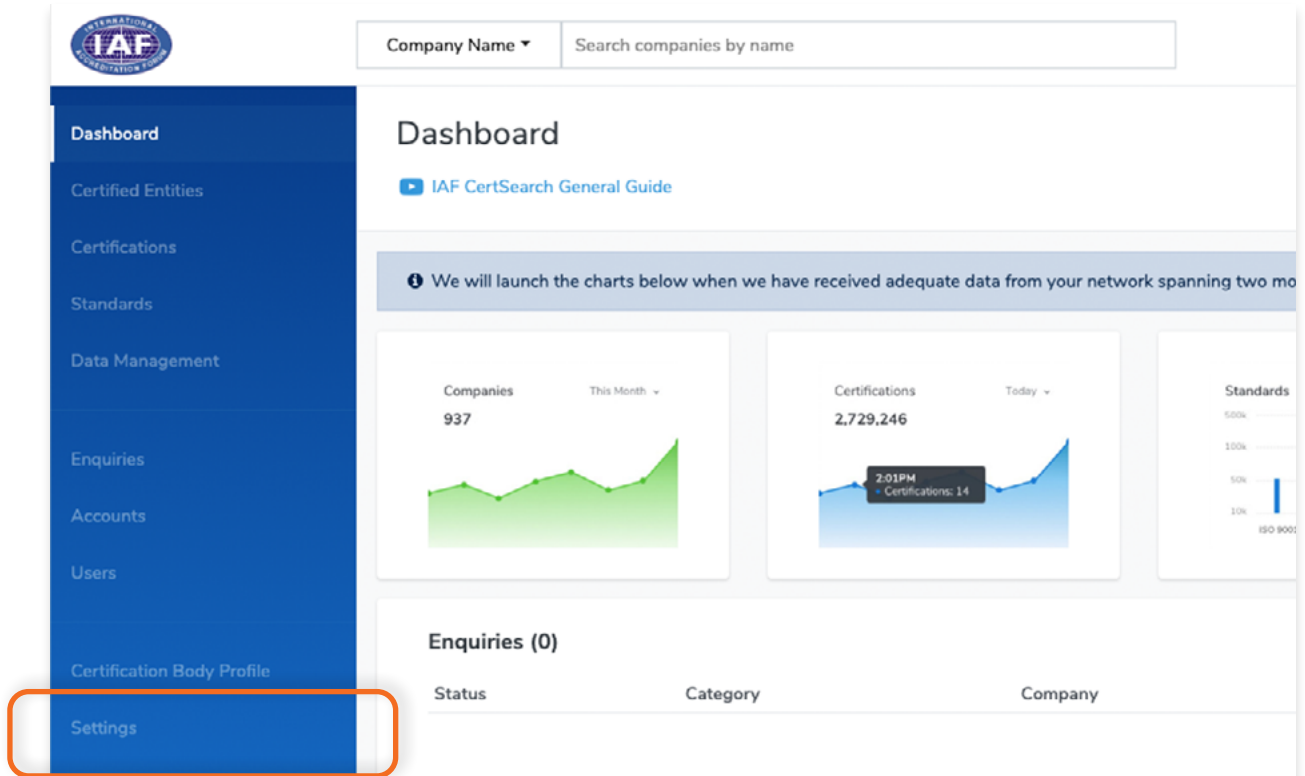
10.4 [How to edit Certification Body Information](#)

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

11. Settings

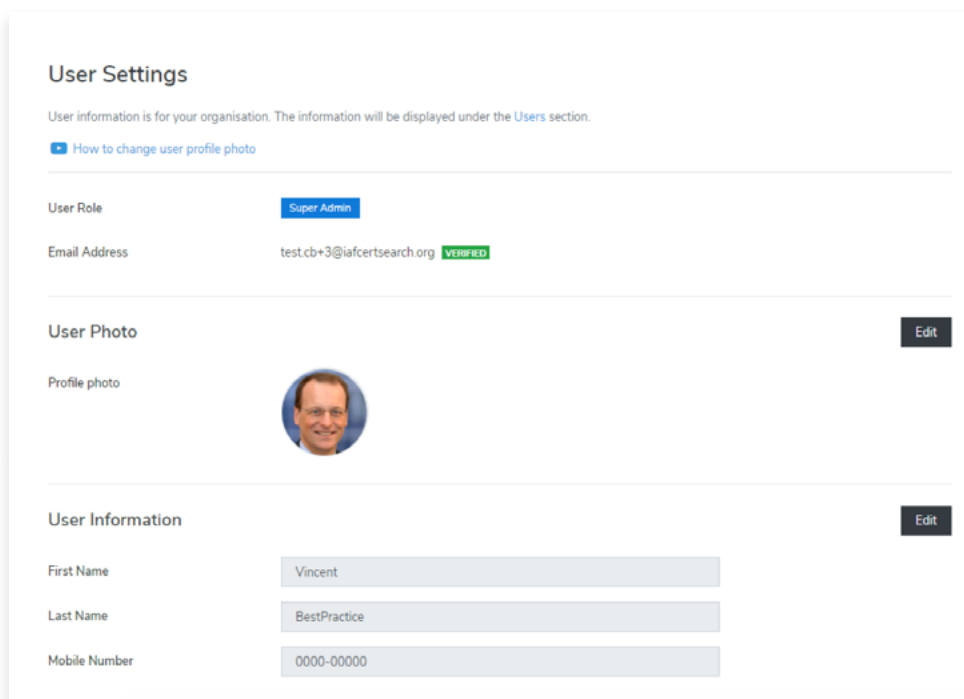
11.1 How to View User Settings

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



The screenshot shows the IAF CertSearch Dashboard. On the left, a navigation menu lists: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, and Settings. The 'Settings' item is highlighted with an orange border. The main content area features a search bar for 'Company Name', a 'Dashboard' heading, and a link to 'IAF CertSearch General Guide'. A notification states: 'We will launch the charts below when we have received adequate data from your network spanning two mo...'. Three charts are displayed: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001). Below the charts is an 'Enquiries (0)' section with a table header: Status, Category, Company.

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



The 'User Settings' page displays the following information:

- User Role:** Super Admin
- Email Address:** test.cb+3@iafcertsearch.org (VERIFIED)
- User Photo:** Profile photo of a man, with an 'Edit' button.
- User Information:** Fields for First Name (Vincent), Last Name (BestPractice), and Mobile Number (0000-00000), with an 'Edit' button.

11.2 How to Edit User Photo

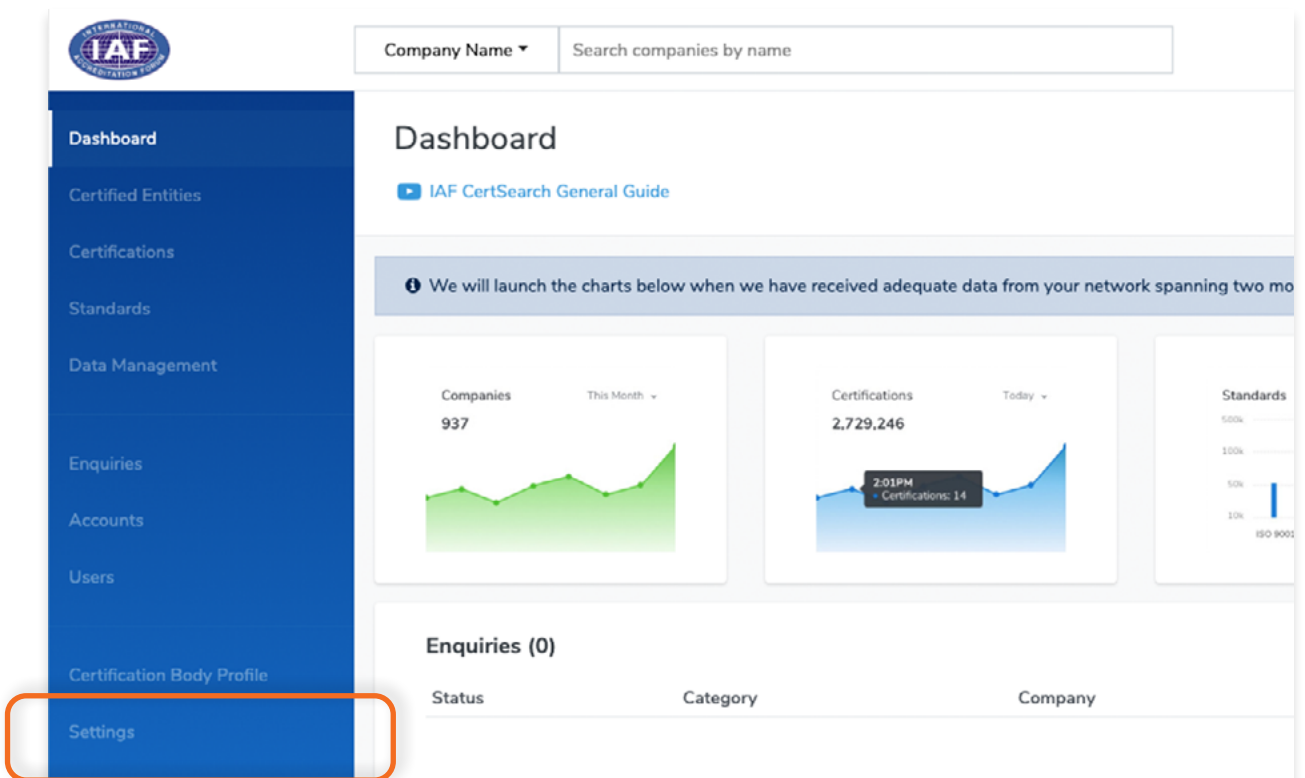
View the step by step guide below or watch the video guide here:

<https://www.youtube.com/watch?v=KnAy891ml7M>

You can add or change your user photo.

Step 1

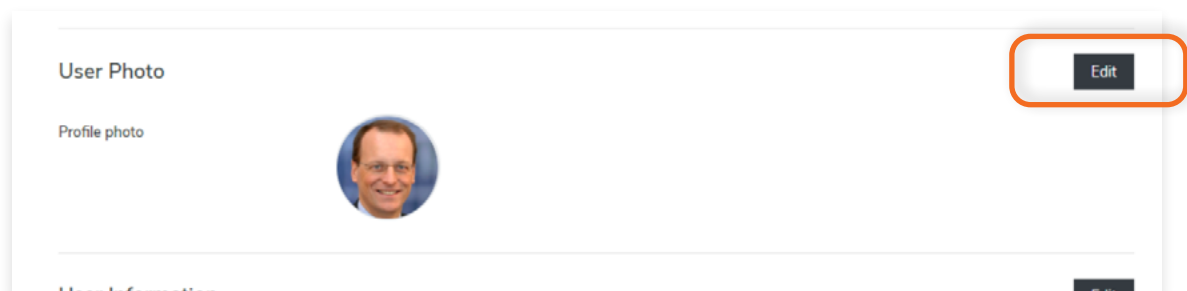
From the Dashboard, click **Settings** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, and Settings. The 'Settings' item is highlighted with an orange rounded rectangle. The main content area shows a search bar for 'Company Name', a 'Dashboard' title, a video link for 'IAF CertSearch General Guide', a notification about data requirements, and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' table with columns for Status, Category, and Company.

Step 2

Click **Edit** in the User Photo section

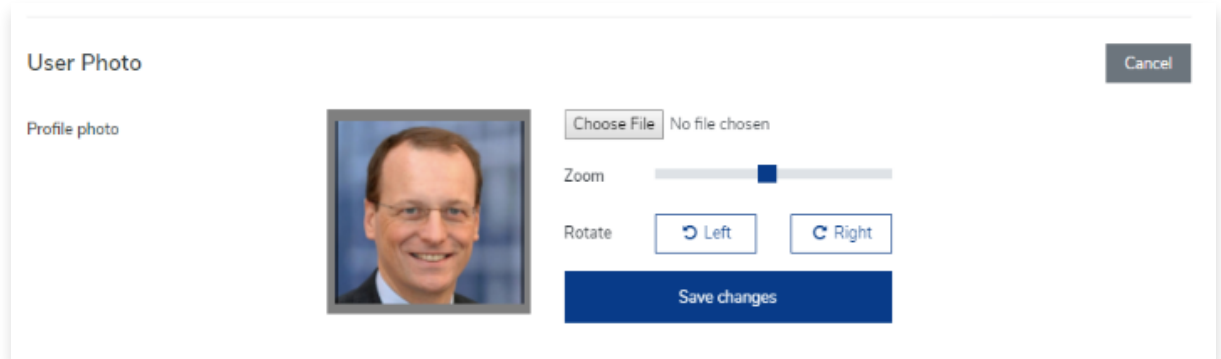


The screenshot shows the 'User Photo' section of a user profile. It includes a 'Profile photo' of a man and an 'Edit' button highlighted with an orange rounded rectangle. Below the photo is a section for 'User Information' with an 'Edit' button.

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

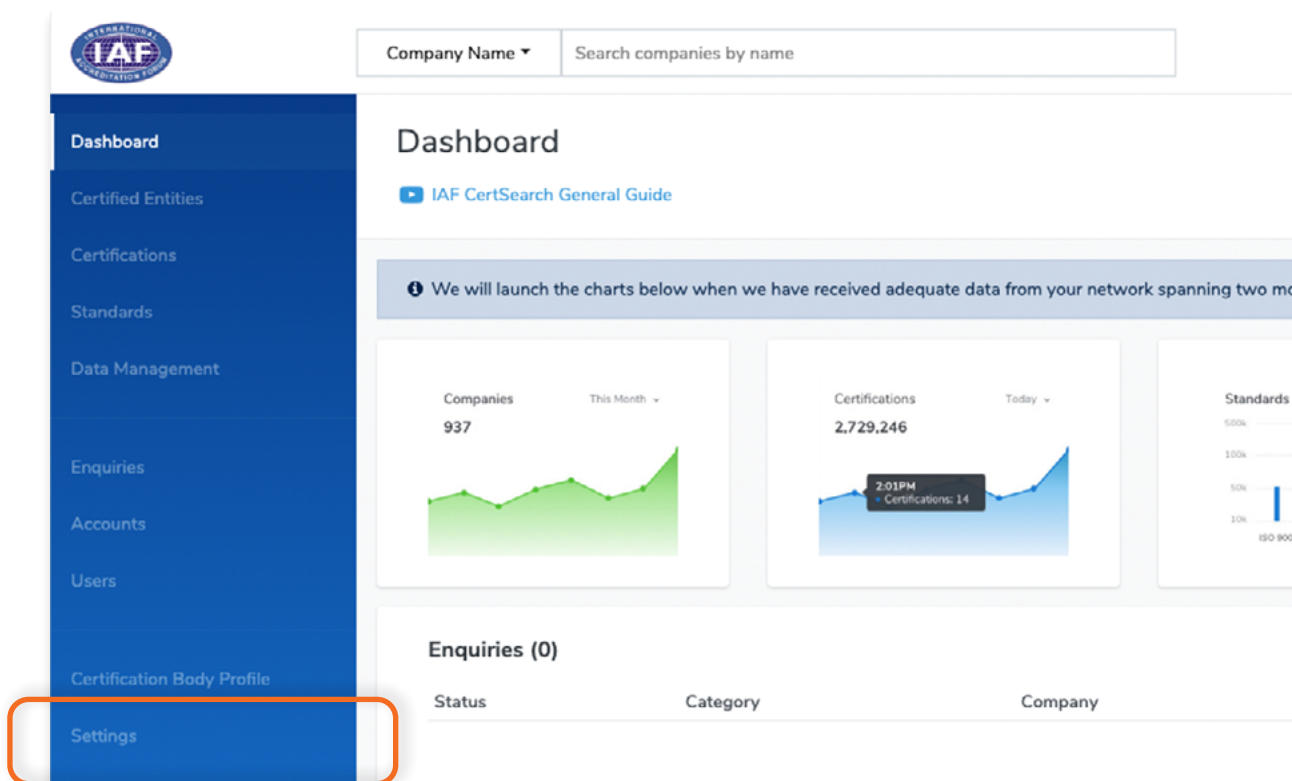


11.3 How to Edit User Information

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.



The screenshot shows the IAF CertSearch Dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, and Settings. The 'Settings' item is highlighted with an orange rectangular box. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a video link for 'IAF CertSearch General Guide', a notification about data requirements, and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' table with columns for Status, Category, and Company.

Step 2

Click **Edit** in the User Information section



The screenshot shows the 'User Information' form. It has a title 'User Information' and an 'Edit' button in the top right corner. The form contains three input fields: 'First Name' with the value 'Vincent', 'Last Name' with the value 'BestPractice', and 'Mobile Number' with the value '0000-00000'.

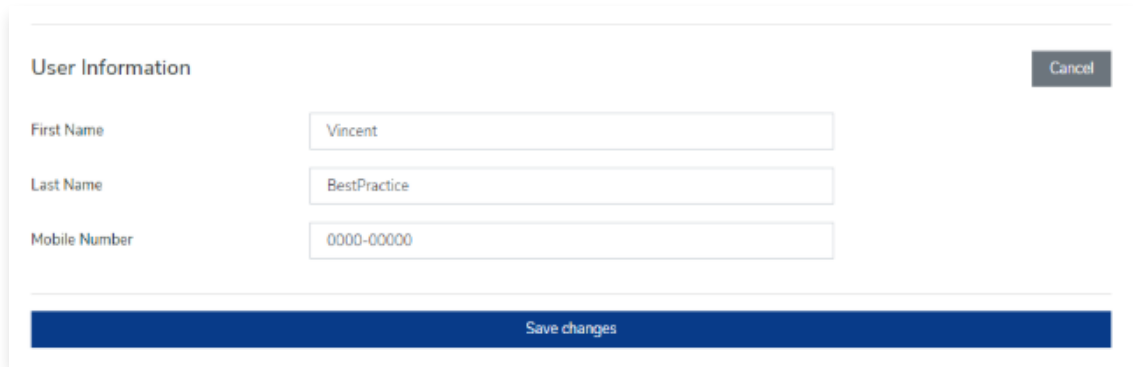
Step 3

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



The image shows a 'User Information' form with three input fields: 'First Name' containing 'Vincent', 'Last Name' containing 'BestPractice', and 'Mobile Number' containing '0000-00000'. To the right of the form is a dark grey button labeled 'Edit', which is highlighted with an orange rounded rectangle.

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



The image shows the same 'User Information' form as above. At the top right of the form is a dark grey button labeled 'Cancel'. At the bottom of the form is a wide, dark blue button labeled 'Save changes'.

Step 4

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



11.4 How to Change Security Settings

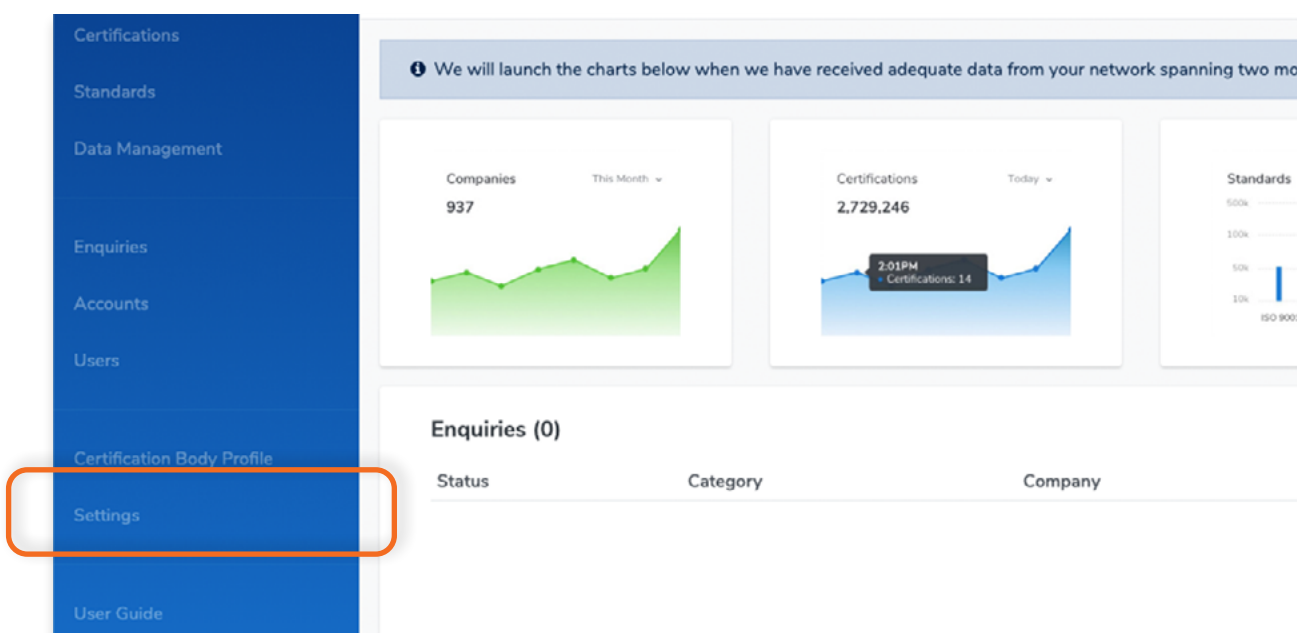
11.4.1 How to Change the Password

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

<https://www.youtube.com/watch?v=OotseBBS2PM>

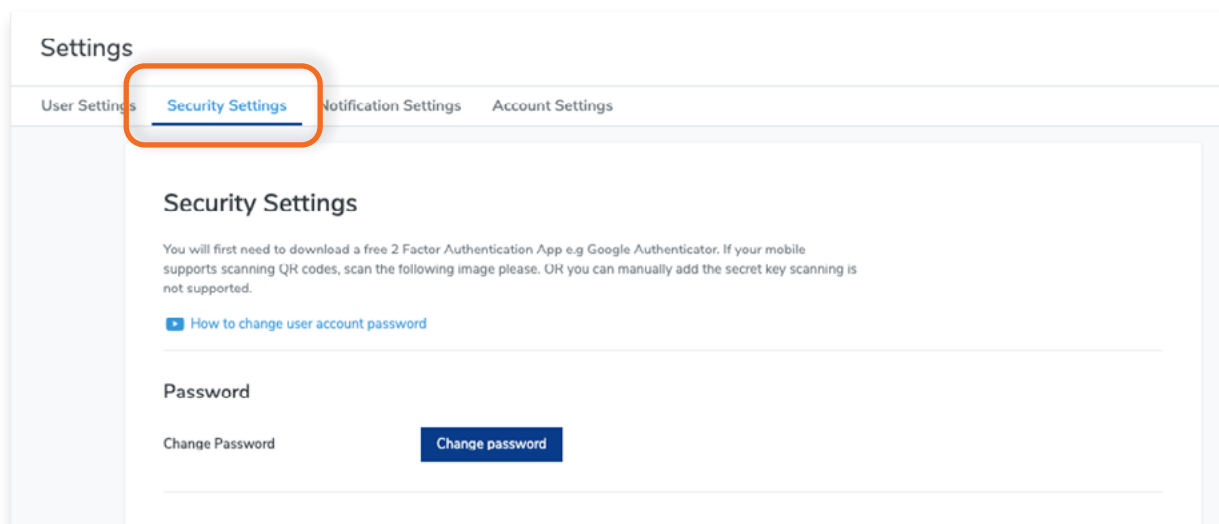
Step 1

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



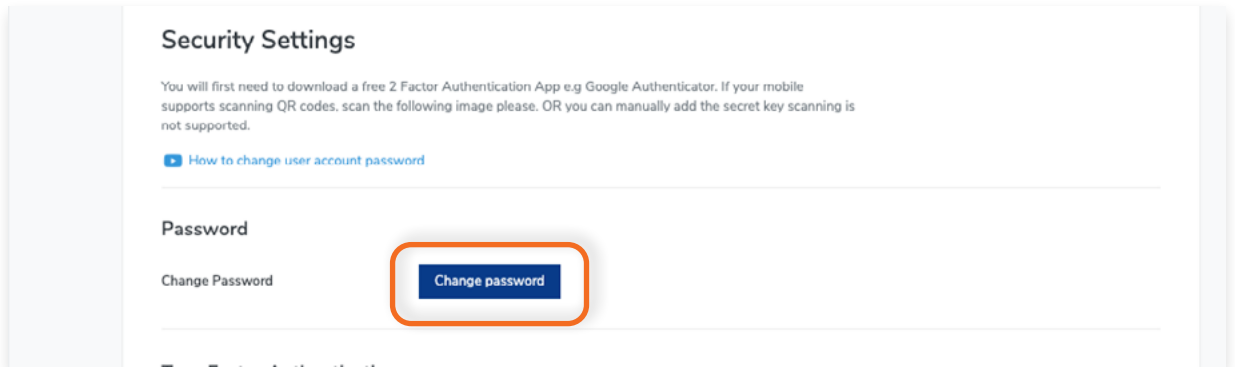
Step 2

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



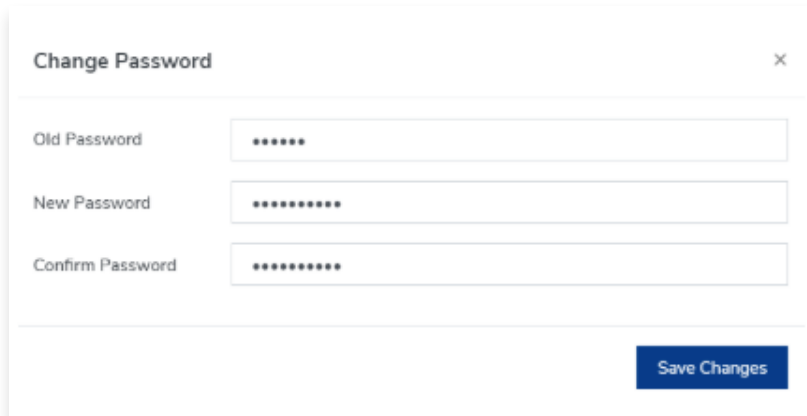
Step 3

Click **Change Password**



Step 4

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

A screenshot of a 'Change Password' dialog box. It has a title bar with 'Change Password' and a close button (X). The dialog contains three input fields: 'Old Password' with six asterisks, 'New Password' with eight asterisks, and 'Confirm Password' with eight asterisks. At the bottom right, there is a blue button labeled 'Save Changes'.

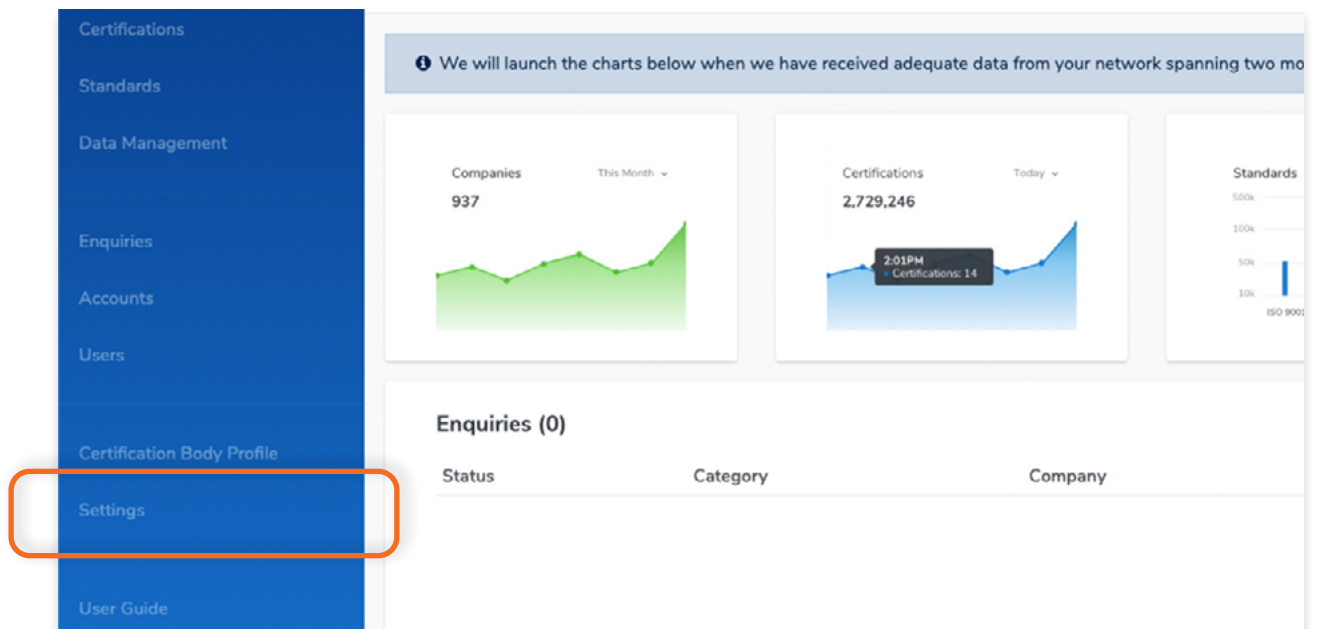
11.4.2. How to Apply 2-Factor Authenticator

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



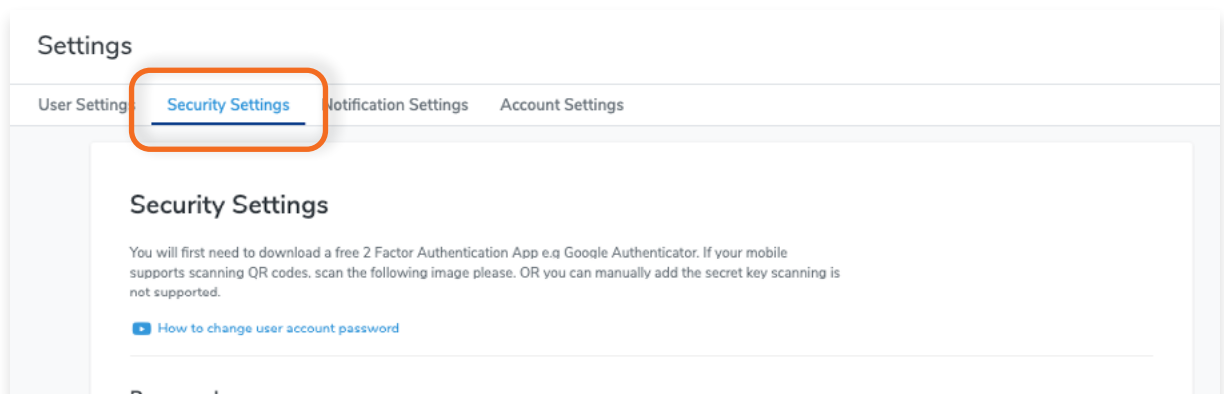
Step 1

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



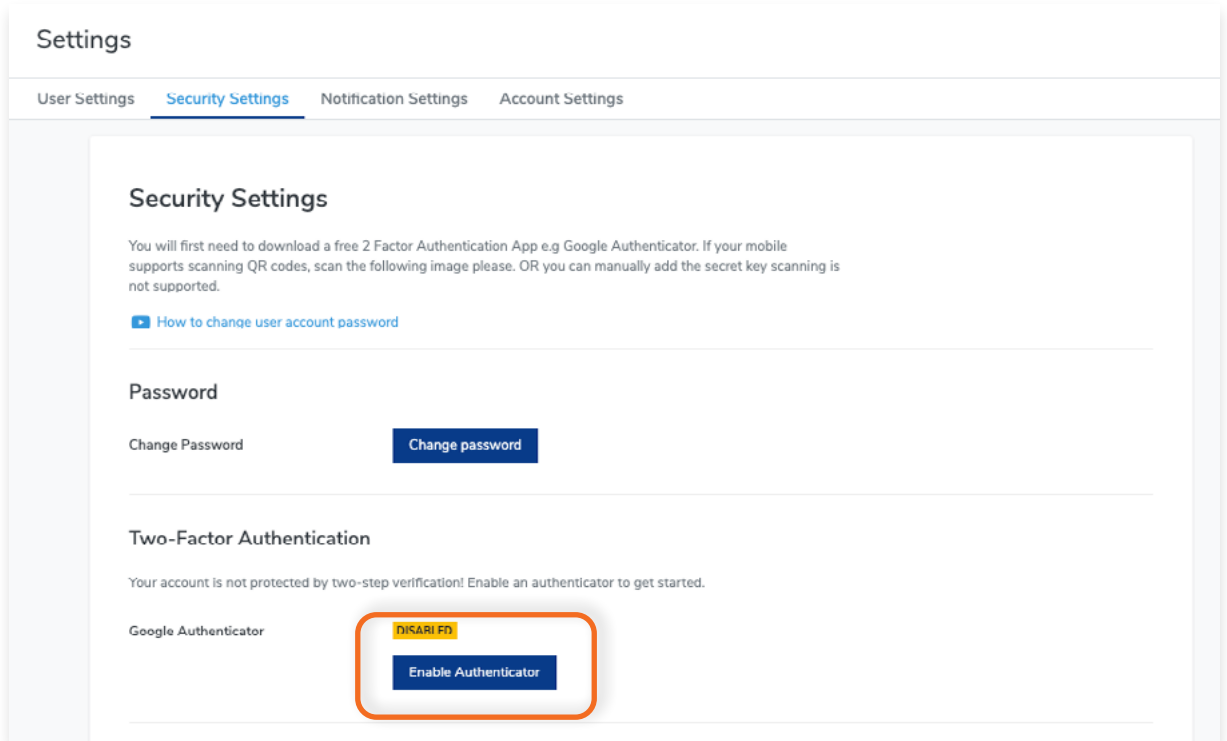
Step 2

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



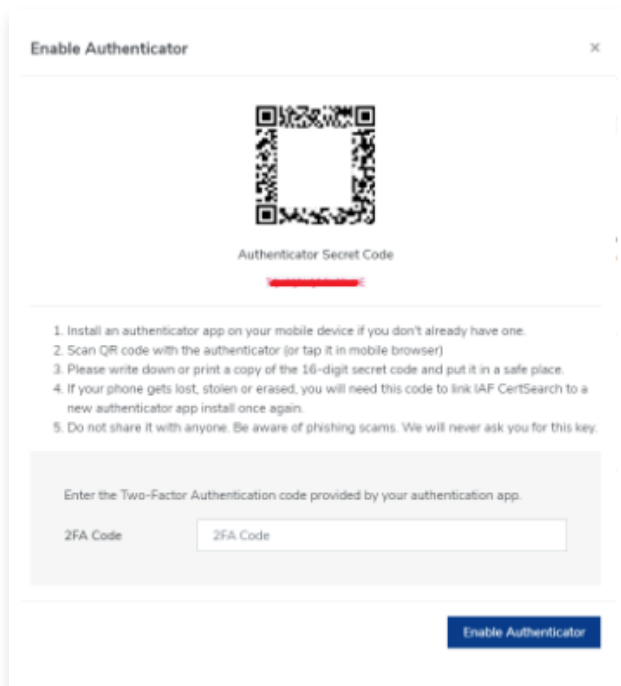
Step 3

Click **Enable Authenticator**



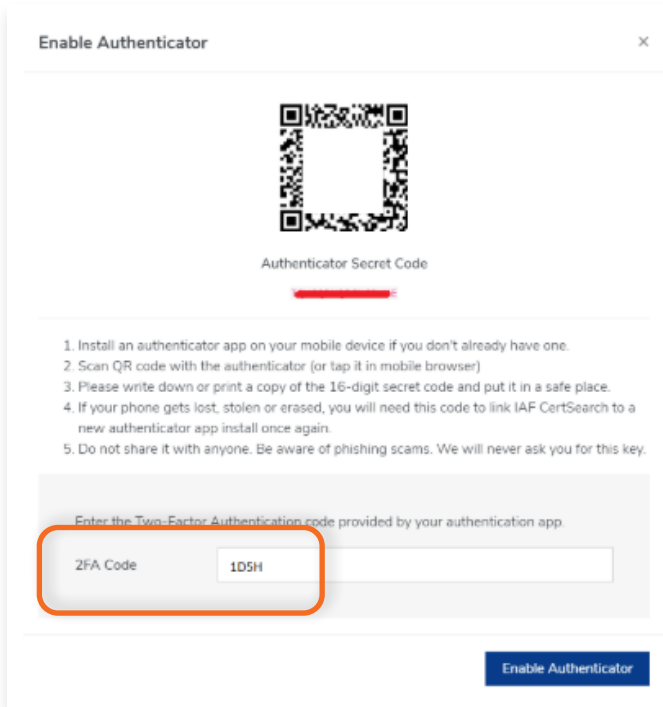
Step 4

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



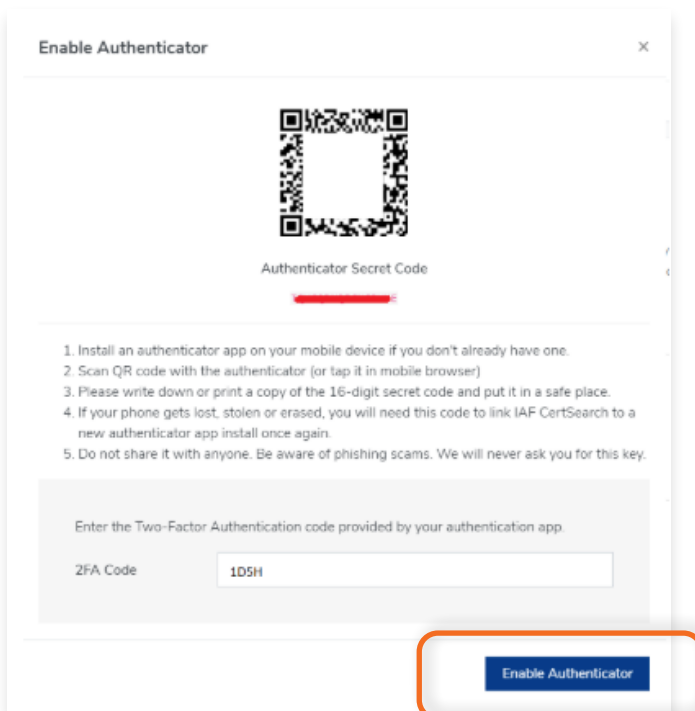
Step 5

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 Alert and Email notifications :

Alert Notifications

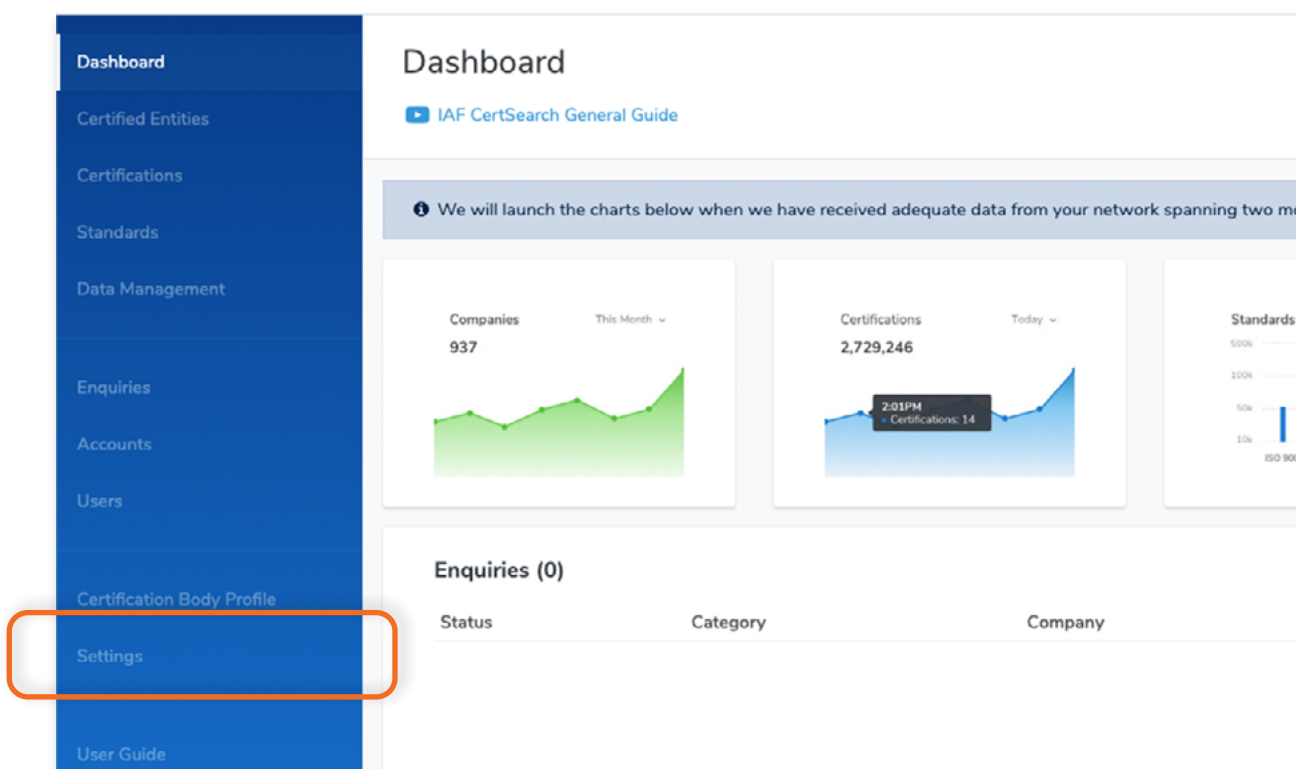
- **General Alerts**
 - Enquiry Updates - Alerts you on New Enquiries, Updates, and Activities
 - Certification Updates - Alerts you on Certification Updates and Activities
- **Data Management**
 - File Upload - Alerts you on File Uploads, Upload Status, and Error Logs

Email Notifications

- **General Alerts**
 - Enquiry Updates -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.

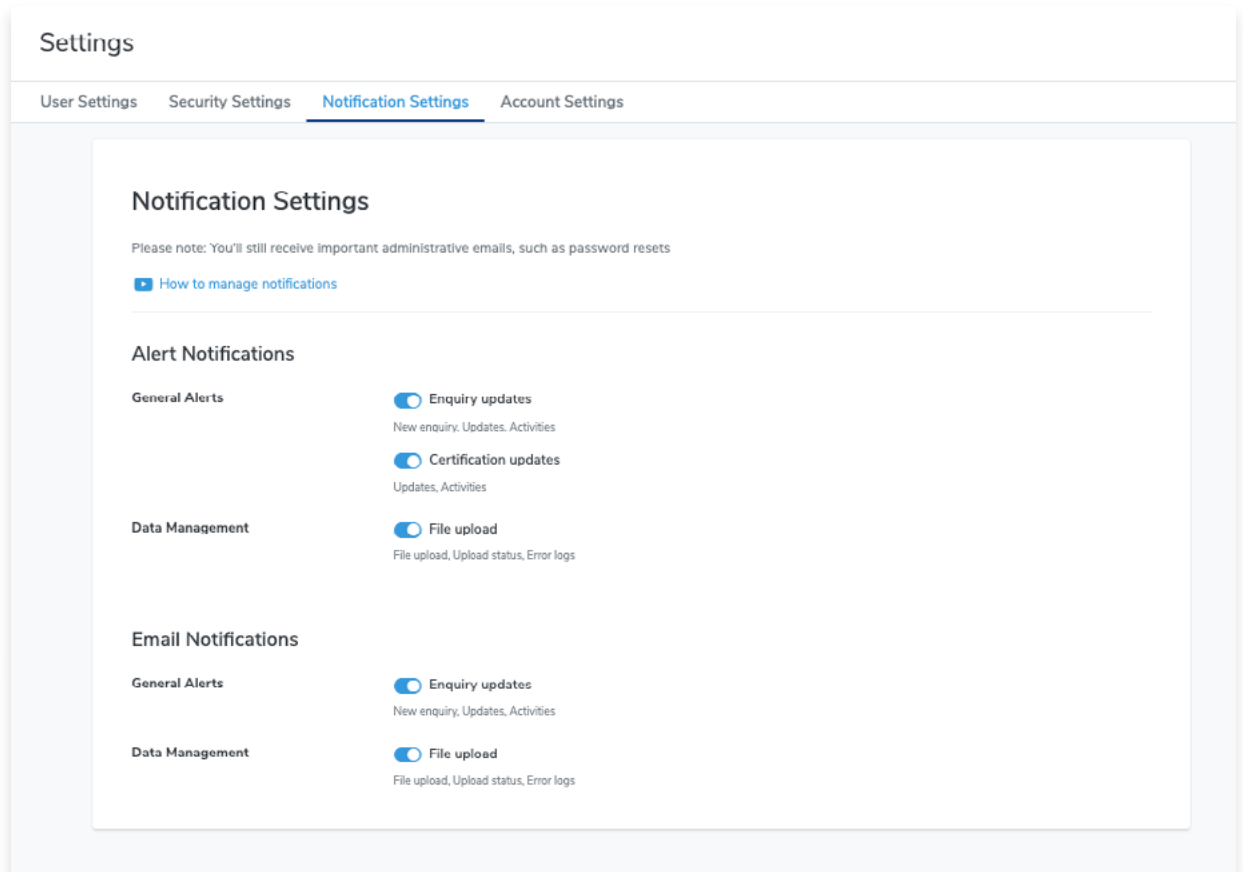


The screenshot shows a dashboard interface. On the left is a dark blue navigation sidebar with the following menu items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, Settings, and User Guide. The 'Settings' item is highlighted with an orange rounded rectangle. The main content area is titled 'Dashboard' and includes a video link 'IAF CertSearch General Guide'. Below this is a notification: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. There are three charts: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (500k, 100k, 50k, 10k, ISO 9002). Below the charts is a section for 'Enquiries (0)' with a table header: Status, Category, Company.

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.



The screenshot shows a 'Settings' page with a navigation bar containing 'User Settings', 'Security Settings', 'Notification Settings' (highlighted), and 'Account Settings'. The main content area is titled 'Notification Settings' and includes a note: 'Please note: You'll still receive important administrative emails, such as password resets'. Below this is a link 'How to manage notifications'. The settings are organized into three sections: 'Alert Notifications', 'Email Notifications', and 'Data Management'. Each section has two categories: 'General Alerts' and 'Data Management'. Under 'Alert Notifications', 'General Alerts' has 'Enquiry updates' (New enquiry, Updates, Activities) and 'Certification updates' (Updates, Activities). 'Data Management' has 'File upload' (File upload, Upload status, Error logs). The 'Email Notifications' section has identical options for 'General Alerts' and 'Data Management'. All toggle switches are currently turned on (to the right).



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

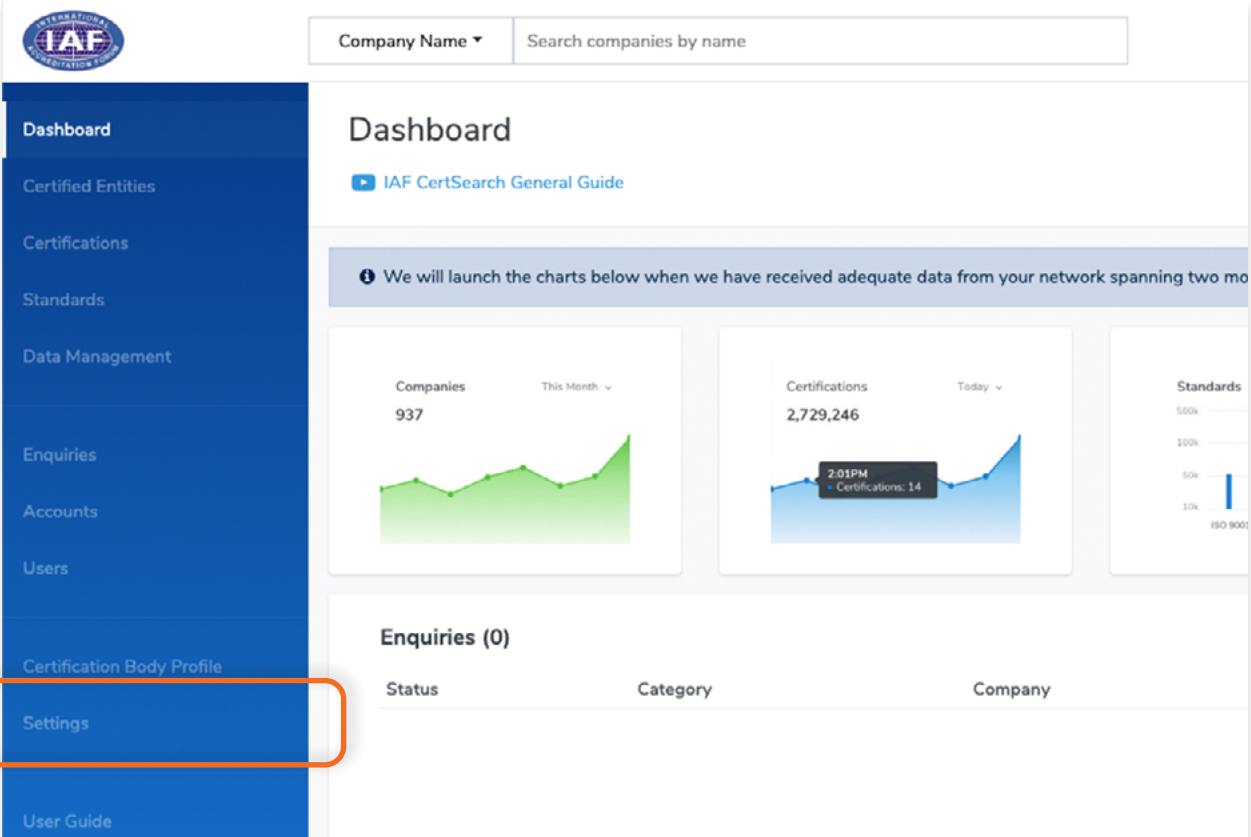
<https://www.youtube.com/watch?v=5iyikL8ijg>

How to Change the Account Website

<https://www.youtube.com/watch?v=DoH2ADjPX3I>

Step 1

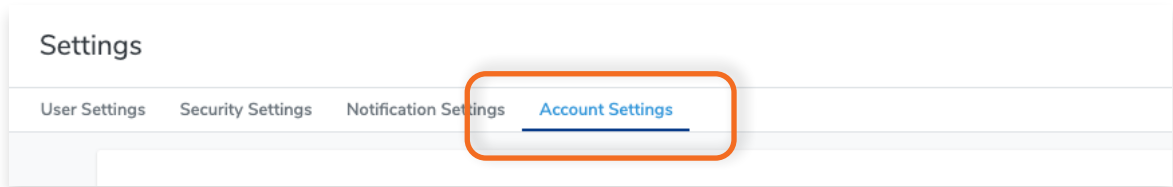
From your dashboard, click **Settings** on the left navigation bar.



The screenshot displays the IAF dashboard interface. On the left, a blue navigation sidebar contains the following menu items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, **Settings** (highlighted with an orange box), and User Guide. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name' with the placeholder text 'Search companies by name'. Below the search bar, there is a video player for 'IAF CertSearch General Guide'. A notification banner states: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. Three data visualization cards are present: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (500k, 100k, 50k, 10k, ISO 9001). A tooltip for the Certifications chart shows '2:01PM Certifications: 14'. At the bottom, an 'Enquiries (0)' table is shown with columns for Status, Category, and Company.

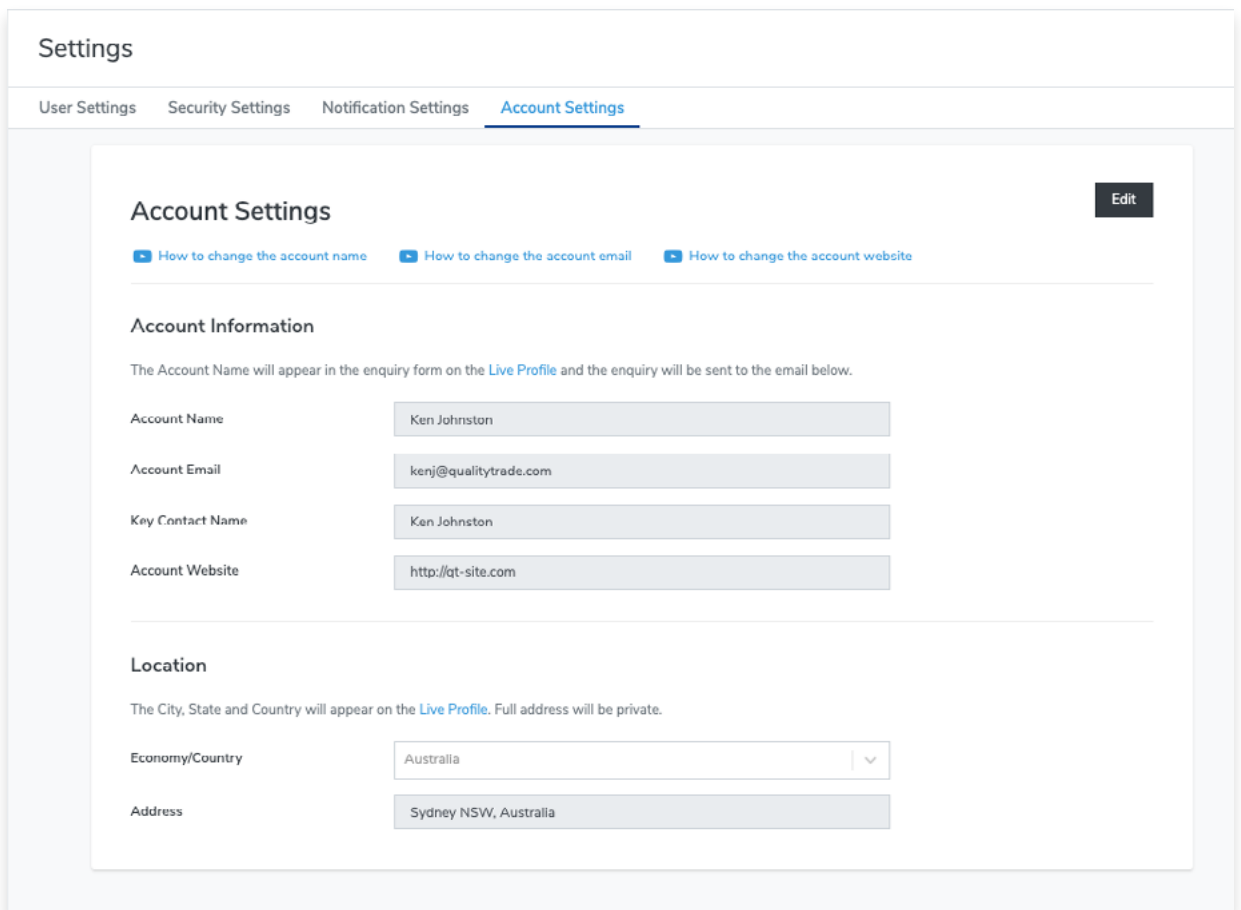
Step 2

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



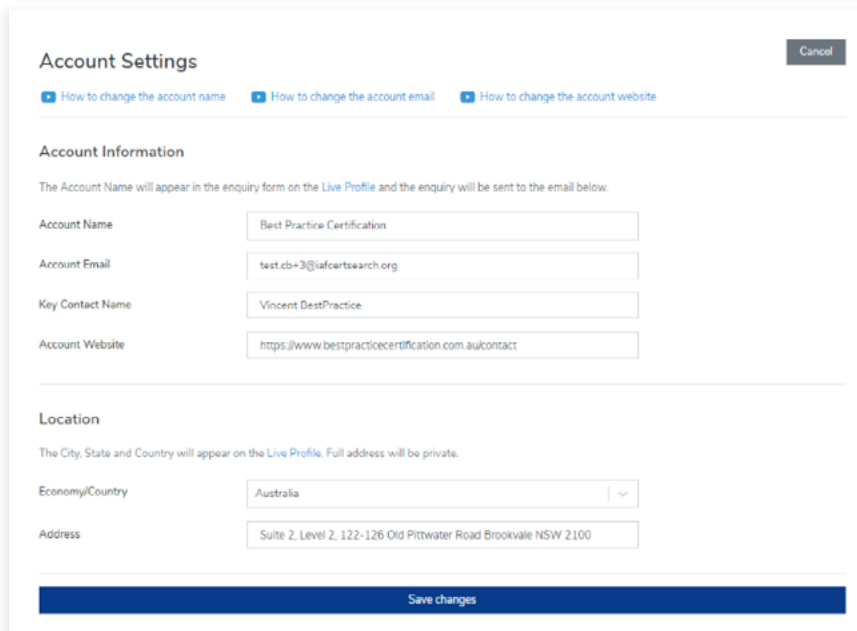
Step 3

Click **Edit**.

A screenshot of the "Account Settings" page. The page has a header "Settings" and a sub-header "Account Settings". Below the sub-header, there are three links: "How to change the account name", "How to change the account email", and "How to change the account website". The page is divided into two sections: "Account Information" and "Location".
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: Ken Johnston
Account Email: kenj@qualitytrade.com
Key Contact Name: Ken Johnston
Account Website: http://qt-site.com
Location
The City, State and Country will appear on the [Live Profile](#). Full address will be private.
Economy/Country: Australia
Address: Sydney NSW, Australia
An "Edit" button is located in the top right corner of the form area.

Step 4

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



The screenshot shows a web form titled "Account Settings" with a "Cancel" button in the top right corner. 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".

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: Best Practice Certification

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

Key Contact Name: Vincent DestPractice

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

Location

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

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

Step 5

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



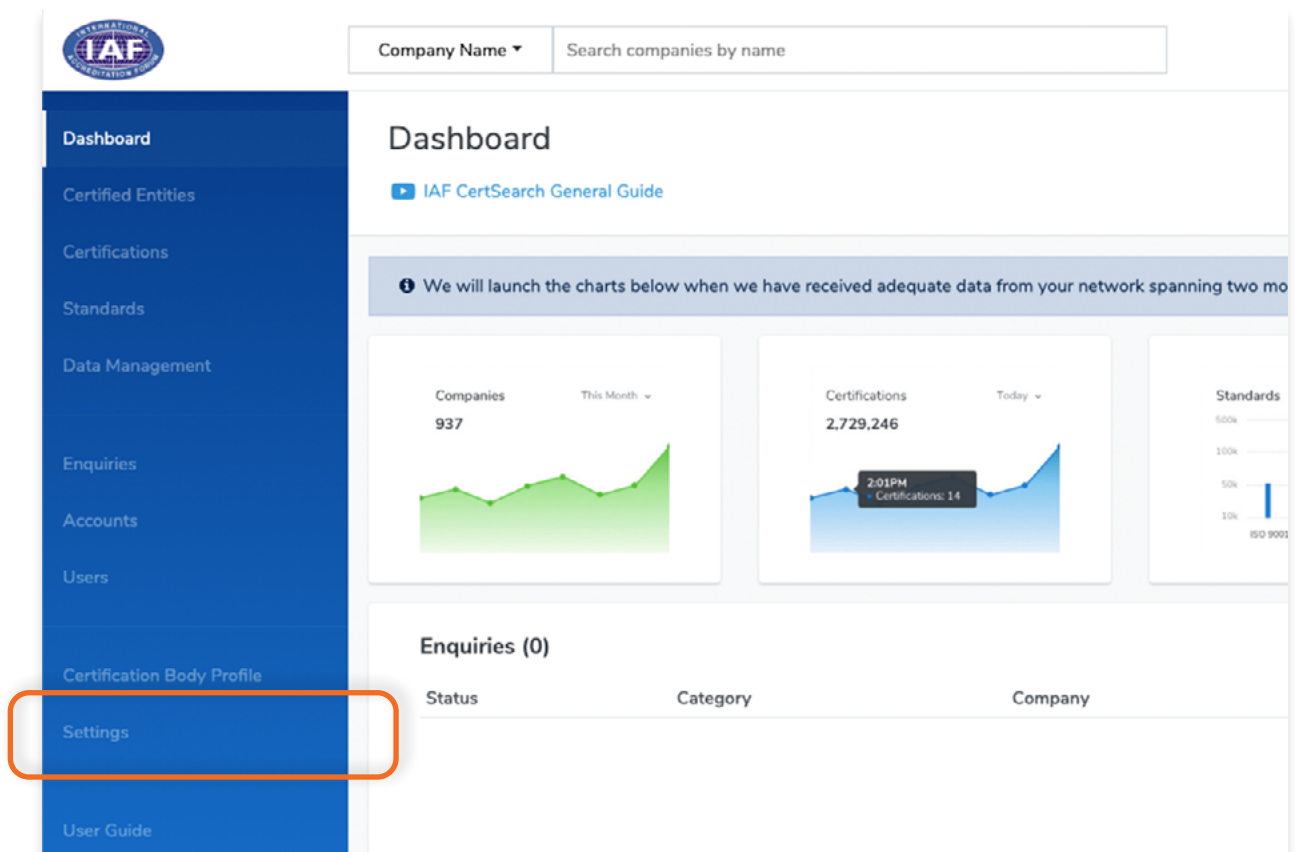
11.6.1 How to change the Account Name

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

<https://www.youtube.com/watch?v=NZxM-je1JXE>

Step 1

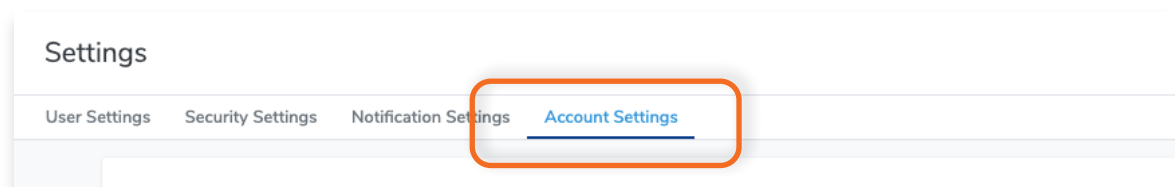
From the Dashboard, click **Settings** in the left hand navigation.



The screenshot shows the IAF CertSearch Dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, **Settings** (highlighted with an orange box), and User Guide. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a video link for 'IAF CertSearch General Guide', a notification about data requirements, and three charts: 'Companies' (937), 'Certifications' (2,729,246), and 'Standards'. Below the charts is an 'Enquiries (0)' table with columns for Status, Category, and Company.

Step 2

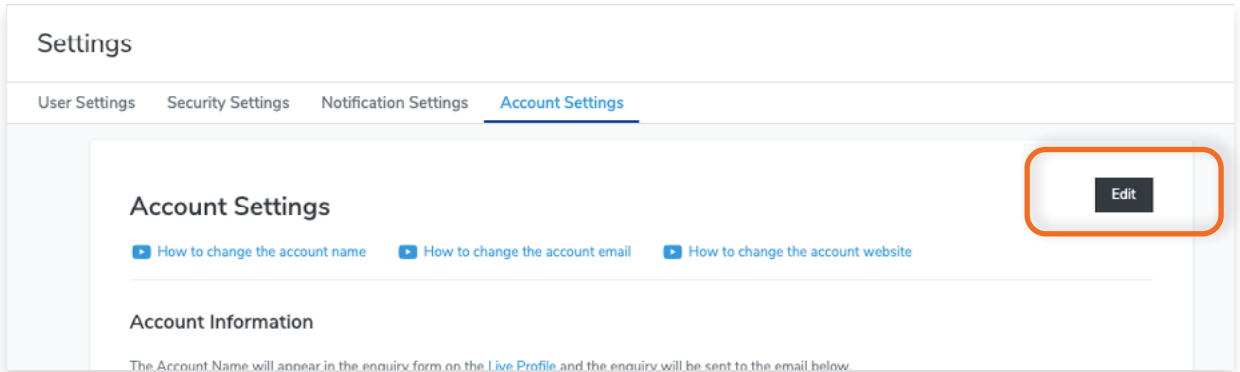
Click **Account Settings** in the menu bar.



The screenshot shows the 'Settings' menu bar with four options: User Settings, Security Settings, Notification Settings, and **Account Settings** (highlighted with an orange box).

Step 3

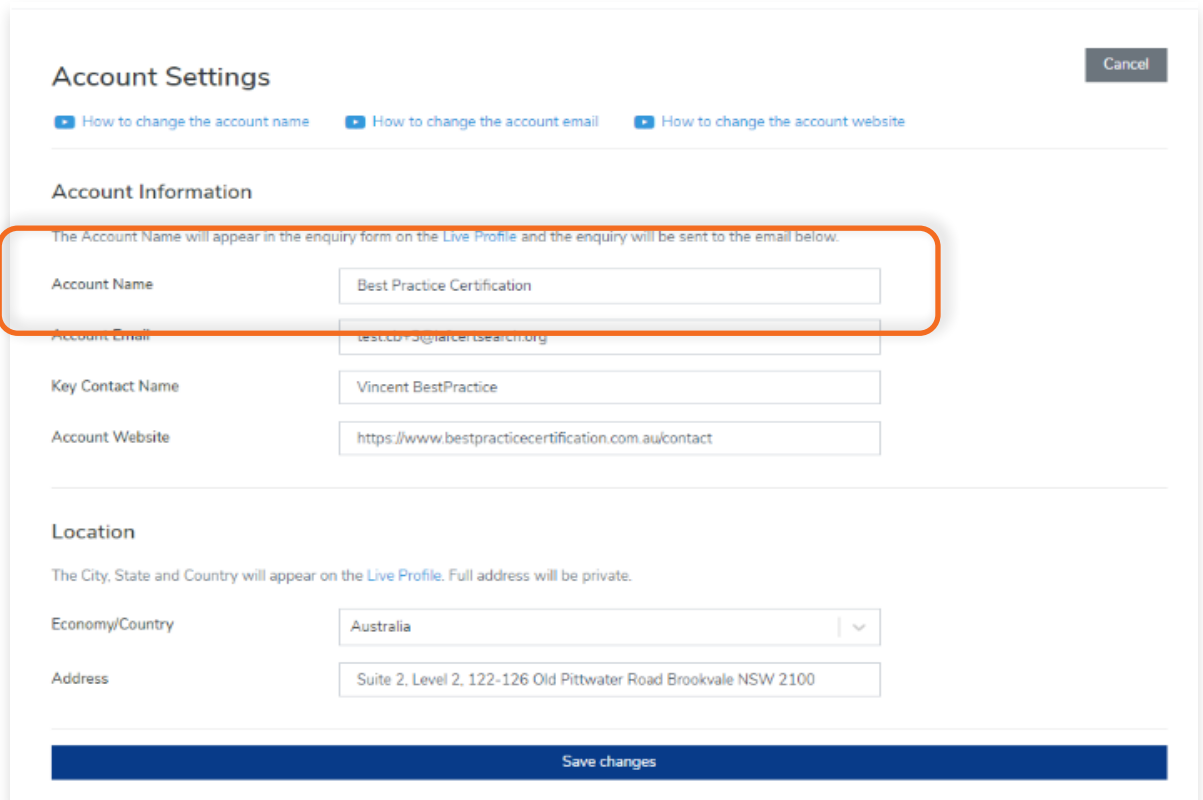
Click **Edit**.



The screenshot shows the 'Settings' page with the 'Account Settings' tab selected. The 'Account Settings' section is visible, and the 'Edit' button is highlighted with an orange box. Below the 'Account Settings' section, there 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 is partially visible below.

Step 4

Edit the Account Name.



The screenshot shows the 'Account Settings' page with the 'Account Information' section expanded. The 'Account Name' field is highlighted with an orange box. The 'Account Name' field contains the text 'Best Practice Certification'. Other fields include 'Account Email' (bestpractice@arcenbestpractice.org), 'Key Contact Name' (Vincent BestPractice), and 'Account Website' (https://www.bestpracticecertification.com.au/contact). The 'Location' section is also visible, with 'Economy/Country' set to 'Australia' and 'Address' set to 'Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100'. A 'Save changes' button is at the bottom, and a 'Cancel' button is at the top right.

Step 5

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



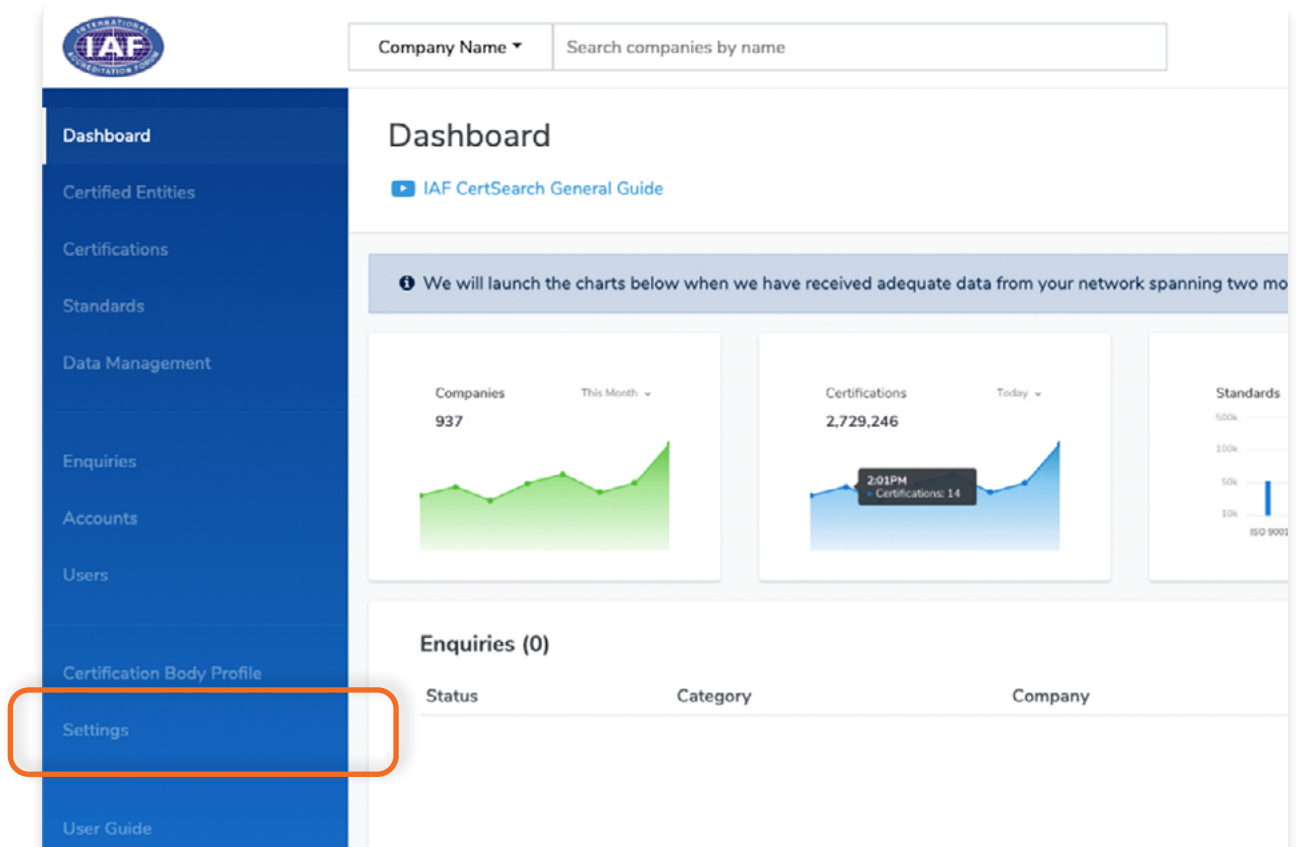
11.6.2 How to Change the Account Email

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

<https://www.youtube.com/watch?v=5iyiklL8ijg>

Step 1

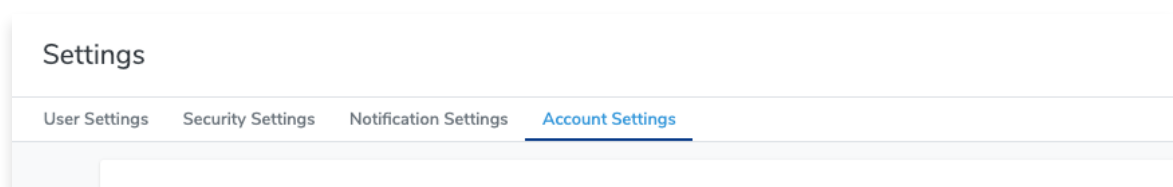
From the Dashboard, click **Settings** in the left hand navigation.



The screenshot shows the IAF dashboard interface. On the left is a dark blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, **Settings** (highlighted with an orange box), and User Guide. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a video link for 'IAF CertSearch General Guide', and a notification: 'We will launch the charts below when we have received adequate data from your network spanning two mo'. Below the notification are three charts: 'Companies' (937, This Month), 'Certifications' (2,729,246, Today), and 'Standards' (ISO 9001). At the bottom, there is an 'Enquiries (0)' table with columns for Status, Category, and Company.

Step 2

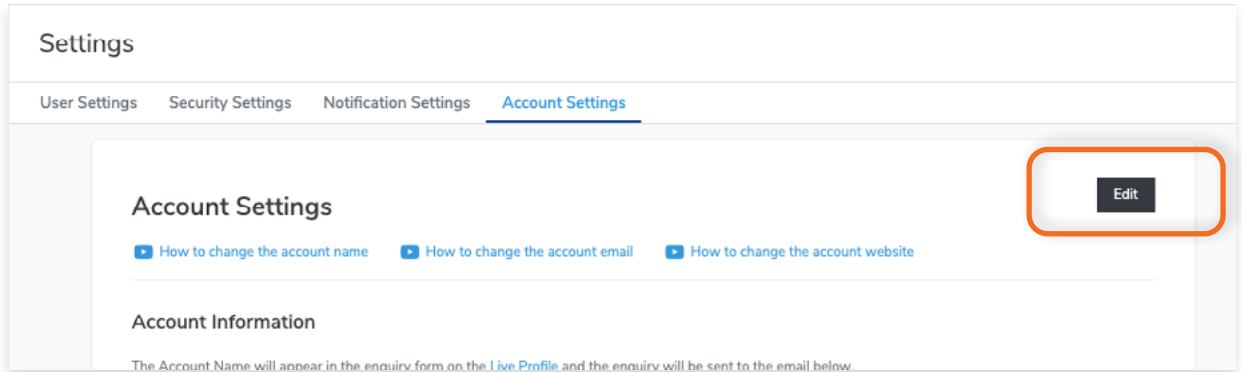
Click **Account Settings** in the menu bar.



The screenshot shows the 'Settings' menu bar with four options: User Settings, Security Settings, Notification Settings, and **Account Settings** (which is underlined and highlighted in blue).

Step 3

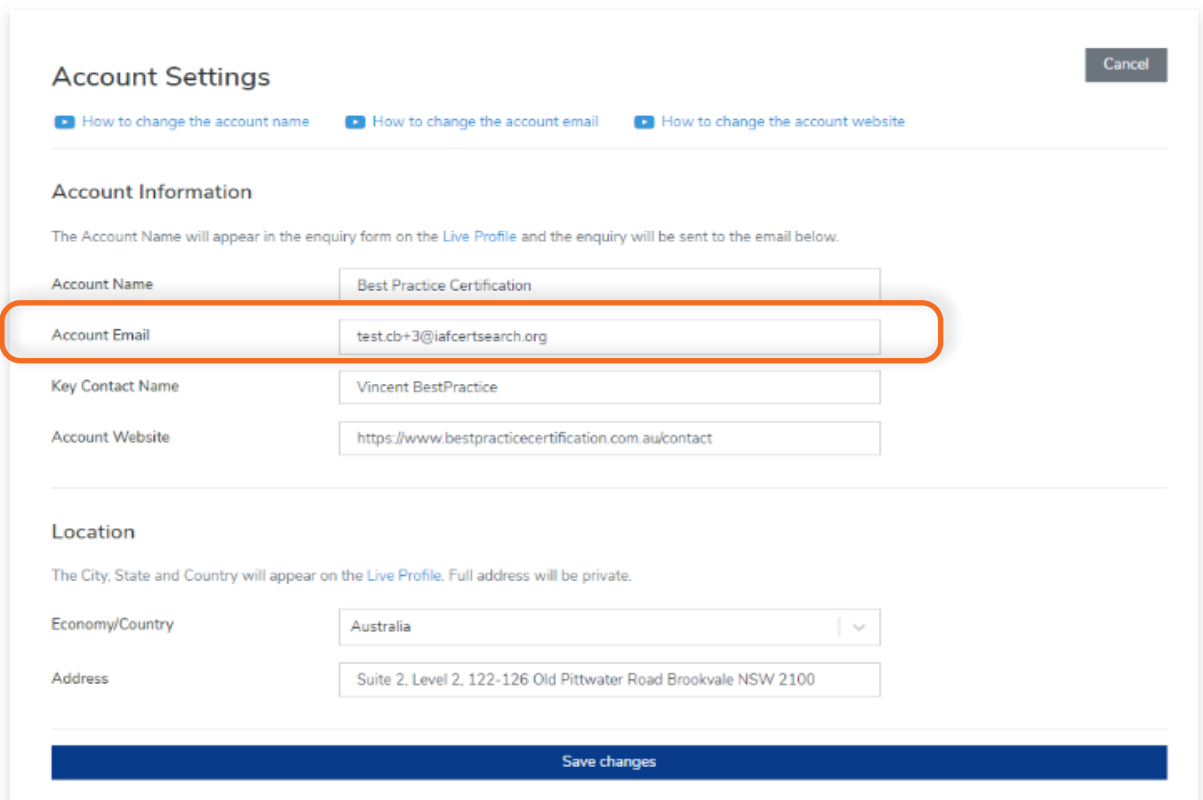
Click **Edit**.



The screenshot shows the 'Settings' page with the 'Account Settings' tab selected. The 'Edit' button is highlighted with an orange border. Below the 'Edit' button, there 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 is partially visible below.

Step 4

Edit the Account Email.



The screenshot shows the 'Account Settings' form with the 'Account Email' field highlighted by an orange border. The form includes a 'Cancel' button in the top right corner. The 'Account Information' section contains the following fields:

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

The 'Location' section contains the following fields:

Economy/Country	Australia
Address	Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100

A 'Save changes' button is located at the bottom of the form.

Step 5

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



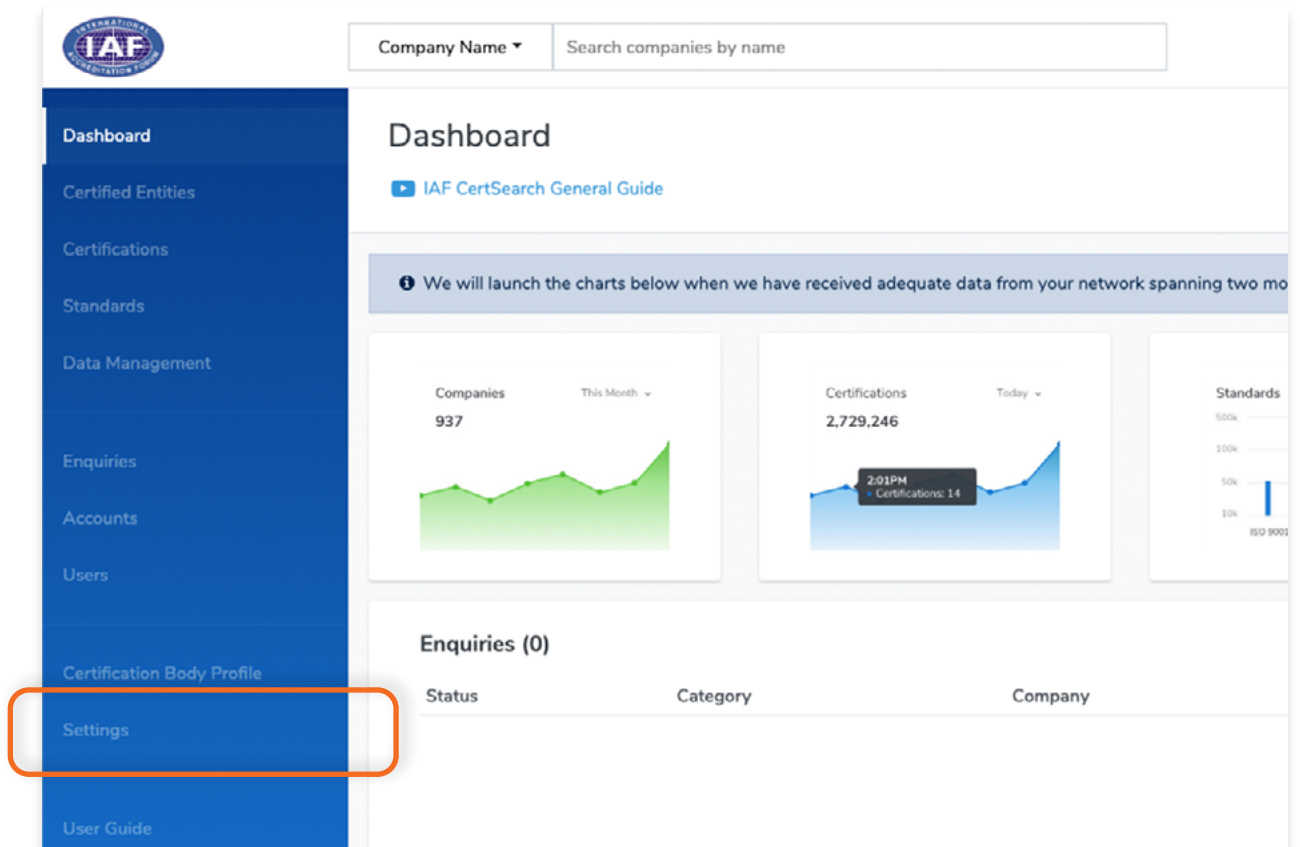
11.6.3 How to Change the Account Website

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

<https://www.youtube.com/watch?v=DoH2ADjPX3I>

Step 1

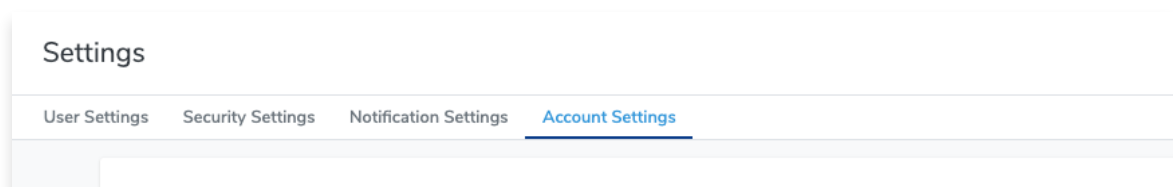
From the Dashboard, click **Settings** in the left hand navigation.



The screenshot shows the IAF CertSearch dashboard. On the left is a blue navigation menu with the following items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, **Settings** (highlighted with an orange box), and User Guide. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name', a video link for 'IAF CertSearch General Guide', a notification about data requirements, three charts for 'Companies' (937), 'Certifications' (2,729,246), and 'Standards', and an 'Enquiries (0)' table with columns for Status, Category, and Company.

Step 2

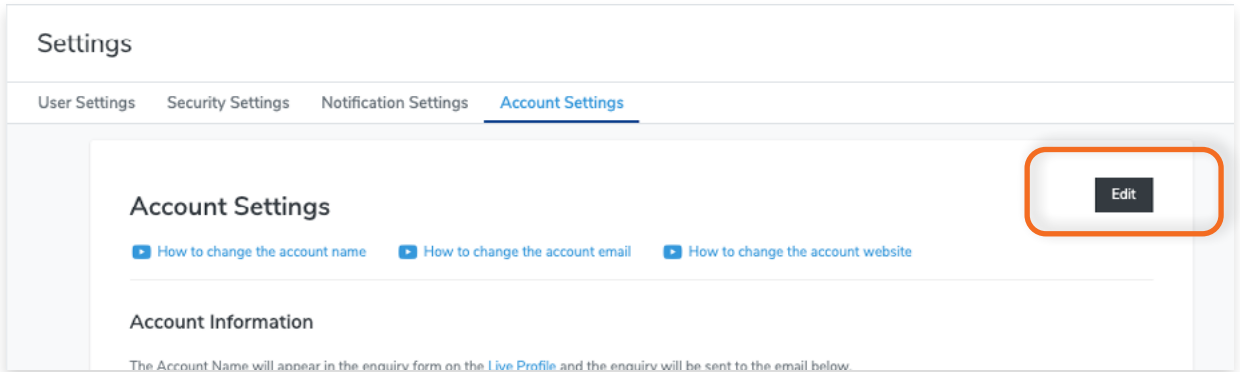
Click **Account Settings** in the menu bar.



The screenshot shows the 'Settings' menu bar with four options: User Settings, Security Settings, Notification Settings, and **Account Settings** (which is underlined and highlighted in blue).

Step 3

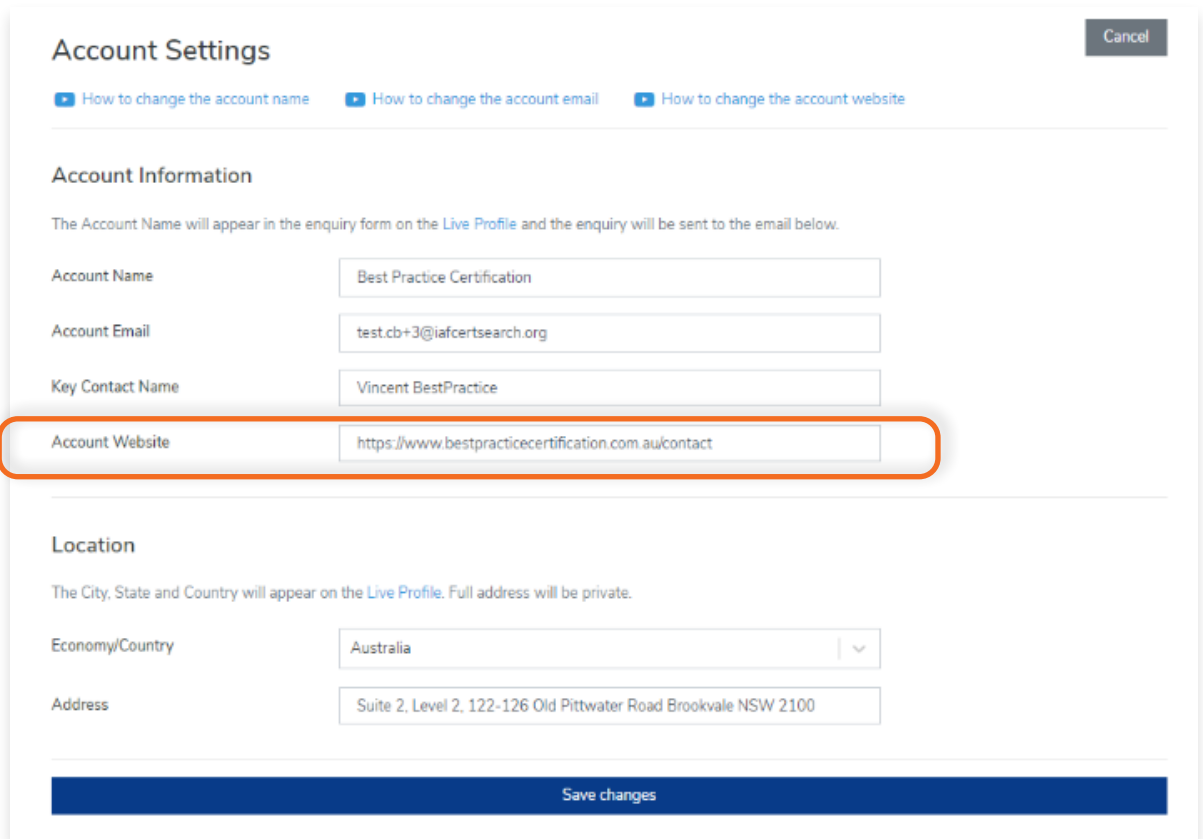
Click **Edit**.



The screenshot shows the 'Settings' page with the 'Account Settings' tab selected. An 'Edit' button is highlighted with an orange box. Below the 'Account Settings' header, there 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 is partially visible below.

Step 4

Edit the Account Website.



The screenshot shows the 'Account Settings' form. The 'Account Website' field is highlighted with an orange box. The form includes a 'Cancel' button in the top right corner. The 'Account Information' section contains the following fields:

Field	Value
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

The 'Location' section contains the following fields:

Field	Value
Economy/Country	Australia
Address	Suite 2, Level 2, 122-126 Old Pittwater Road Brookvale NSW 2100

A 'Save changes' button is located at the bottom of the form.

Step 5

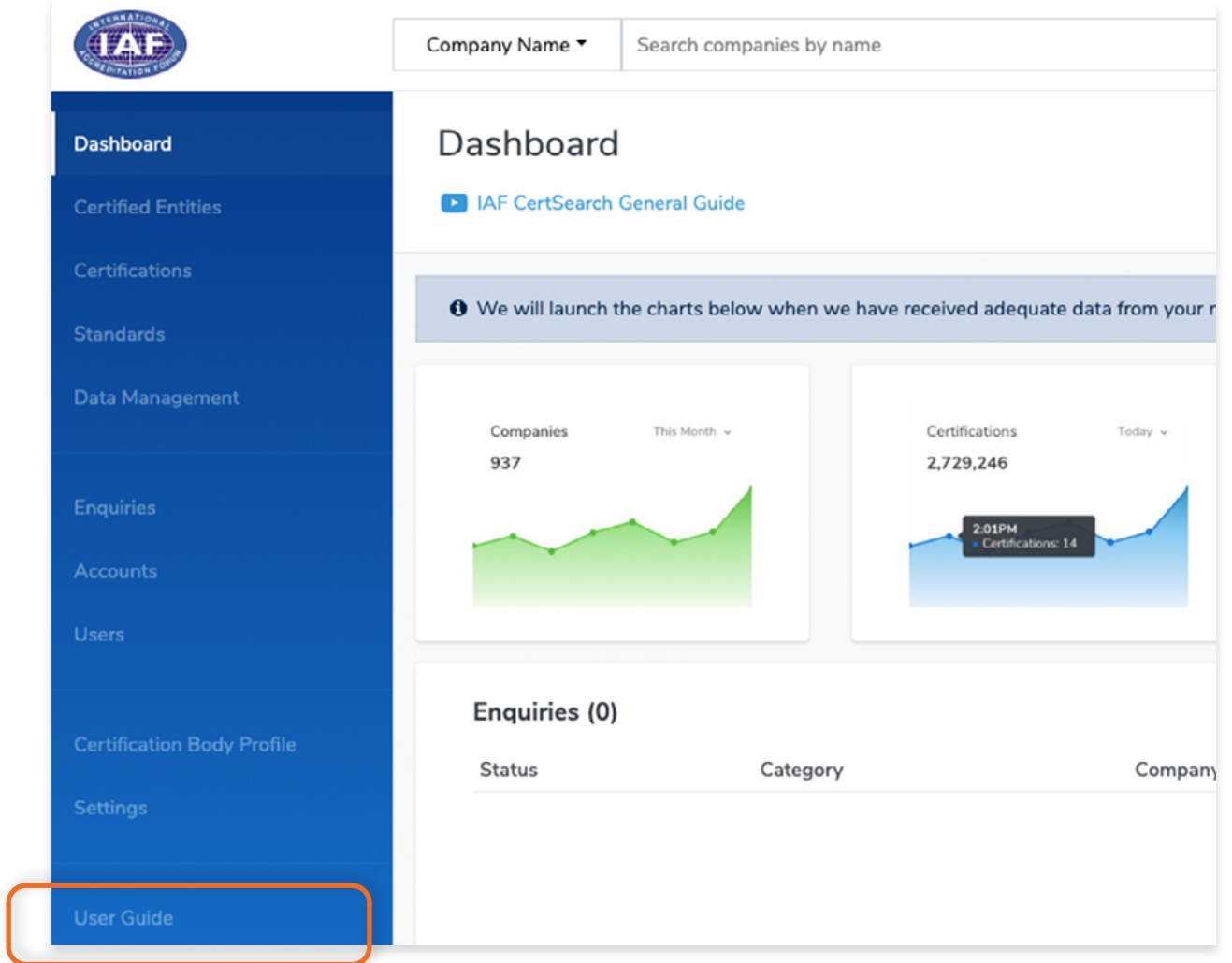
Click **Save changes** or click **Cancel** to revert changes.



12.1 How to View the User Guide

Step 1

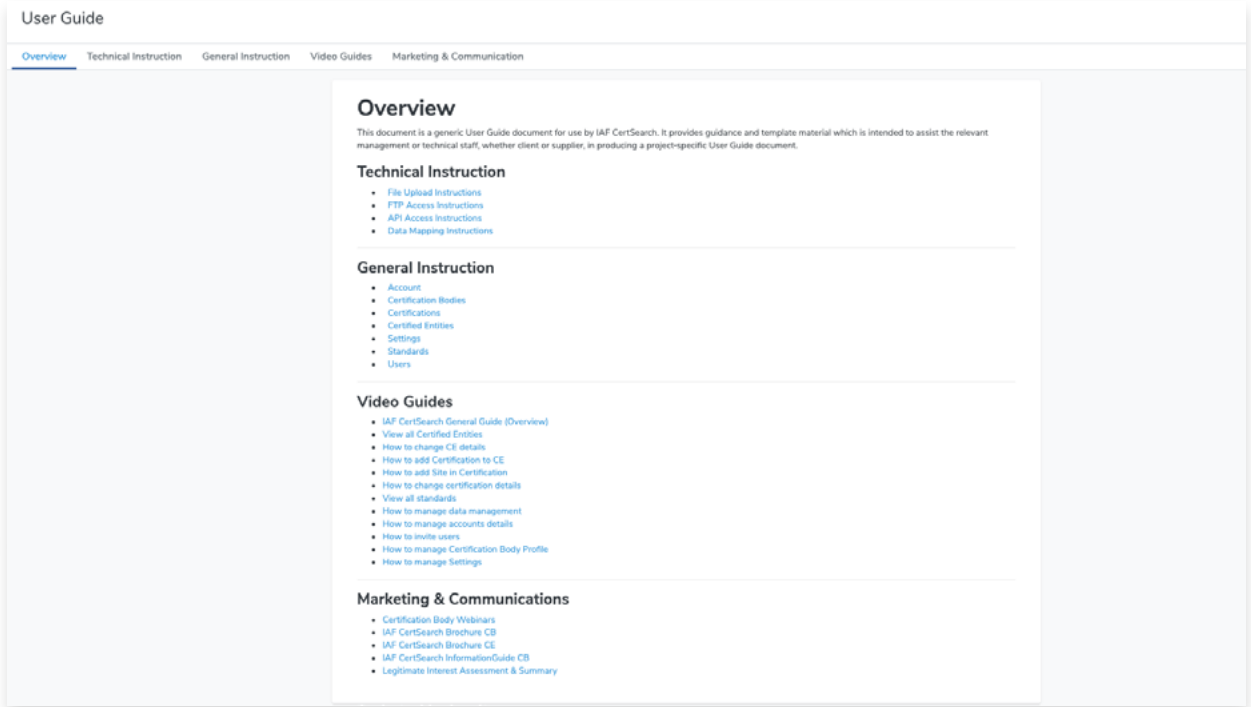
From your dashboard, click **User Guide** on the left navigation bar.



The screenshot displays the IAF dashboard interface. On the left is a blue navigation sidebar with the IAF logo at the top. The sidebar contains the following menu items: Dashboard, Certified Entities, Certifications, Standards, Data Management, Enquiries, Accounts, Users, Certification Body Profile, Settings, and User Guide. The 'User Guide' item is highlighted with an orange rectangular border. The main content area is titled 'Dashboard' and includes a search bar for 'Company Name' with the placeholder text 'Search companies by name'. Below the search bar is a video player for 'IAF CertSearch General Guide'. A notification banner states: 'We will launch the charts below when we have received adequate data from your r'. There are two line charts: 'Companies' (937) for 'This Month' and 'Certifications' (2,729,246) for 'Today'. The 'Certifications' chart has a tooltip showing '2:01PM' and 'Certifications: 14'. At the bottom, there is an 'Enquiries (0)' section with a table header containing 'Status', 'Category', and 'Company'.

Step 2

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



The screenshot displays the 'User Guide' page with a navigation bar at the top containing the following tabs: Overview, Technical Instruction, General Instruction, Video Guides, and Marketing & Communication. The 'Overview' tab is currently selected. The main content area is divided into several sections:

- Overview**
This document is a generic User Guide document for use by IAF CertSearch. It provides guidance and template material which is intended to assist the relevant management or technical staff, whether client or supplier, in producing a project-specific User Guide document.
- Technical Instruction**
 - File Upload Instructions
 - FTP Access Instructions
 - API Access Instructions
 - Data Mapping Instructions
- General Instruction**
 - Account
 - Certification Bodies
 - Certifications
 - Certified Entities
 - Settings
 - Standards
 - Users
- Video Guides**
 - IAF CertSearch General Guide (Overview)
 - View all Certified Entities
 - How to change CE details
 - How to add Certification to CE
 - How to add Site in Certification
 - How to change certification details
 - View all standards
 - How to manage data management
 - How to manage accounts details
 - How to invite users
 - How to manage Certification Body Profile
 - How to manage Settings
- Marketing & Communications**
 - Certification Body Webinars
 - IAF CertSearch Brochure CB
 - IAF CertSearch Brochure CE
 - IAF CertSearch InformationGuide CB
 - Legitimate Interest Assessment & Summary

