



Community Select

Authorised Contractor System

User Guide for Companies and Sole Traders

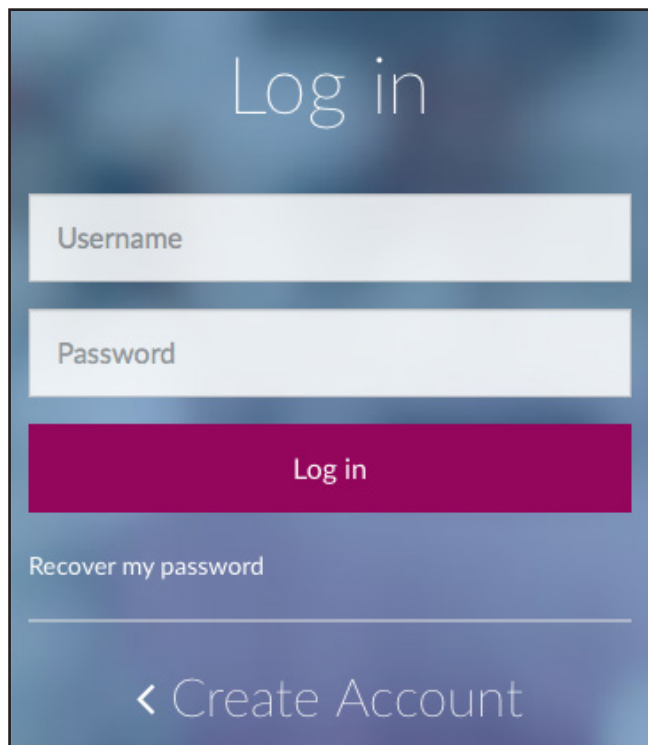
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Creating your username	3
Recovering your password	7
Registering your business	11
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Uploading company documents	24
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CREATING YOUR USERNAME

Community Select Contractor Management System

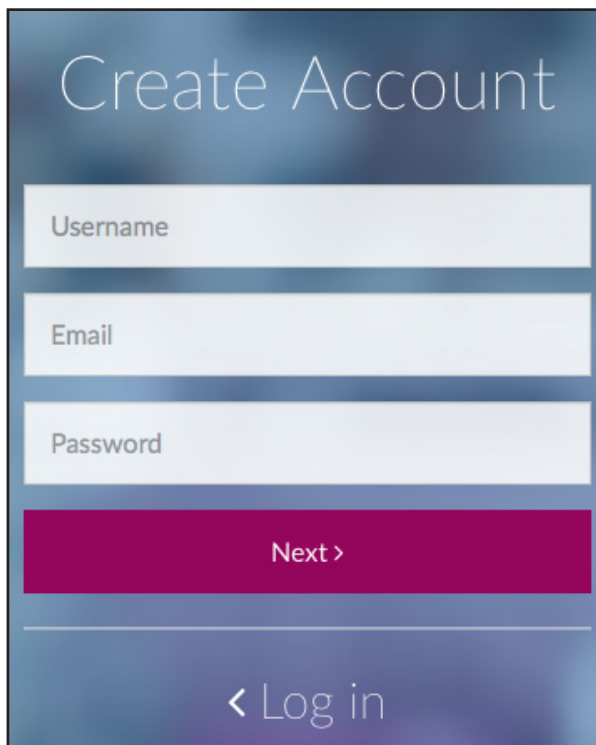
Please follow this step-by-step guide to register your company and upload your documents for verification in the Community Select Authorised Contractor System.

The image shows a 'Log in' screen with a dark blue background. At the top, the text 'Log in' is displayed in white. Below it are two white input fields: 'Username' and 'Password'. A red 'Log in' button is positioned below the password field. At the bottom left, there is a link 'Recover my password' and a white '< Create Account' button.

Step 1

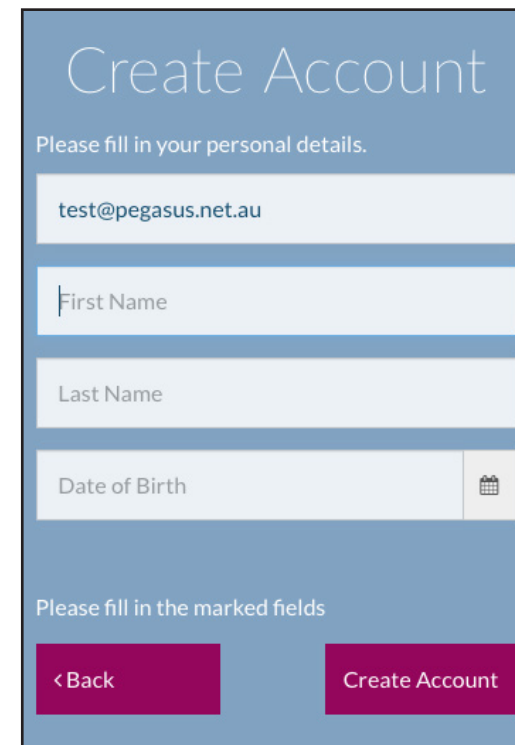
Please go to <http://www.communityselect.com.au> and click "Register" in the top menu bar.

Once on the home page for the Community Select Authorised Contractor System, click "Create Account."

The image shows a 'Create Account' screen with a dark blue background. At the top, the text 'Create Account' is displayed in white. Below it are three white input fields: 'Username', 'Email', and 'Password'. A red 'Next >' button is positioned below the password field. At the bottom, there is a white '< Log in' button.

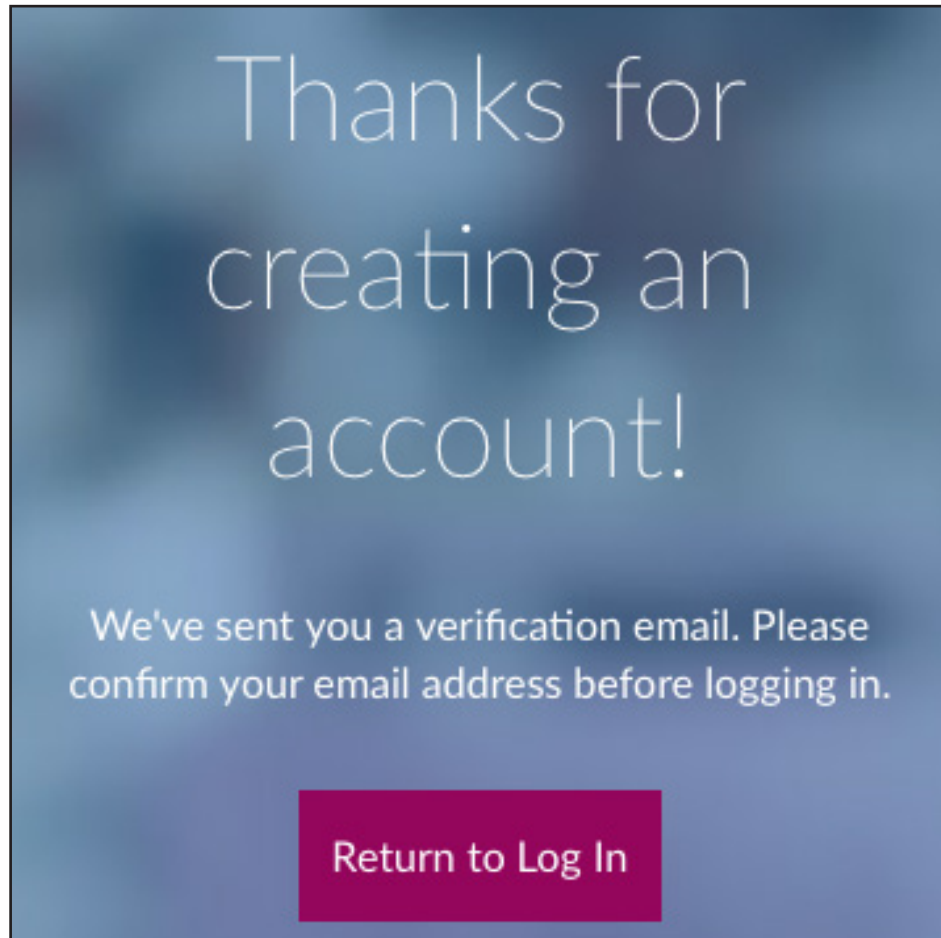
Step 2

To create an account, enter a username, email address and a password. Once you have filled in the marked fields, click "Next."

The image shows a 'Create Account' screen with a light blue background. At the top, the text 'Create Account' is displayed in white. Below it is the instruction 'Please fill in your personal details.' followed by four white input fields: 'test@pegasus.net.au' (Email), 'First Name', 'Last Name', and 'Date of Birth' (with a calendar icon). Below these fields is the instruction 'Please fill in the marked fields' and two red buttons: '< Back' and 'Create Account'.

Step 3

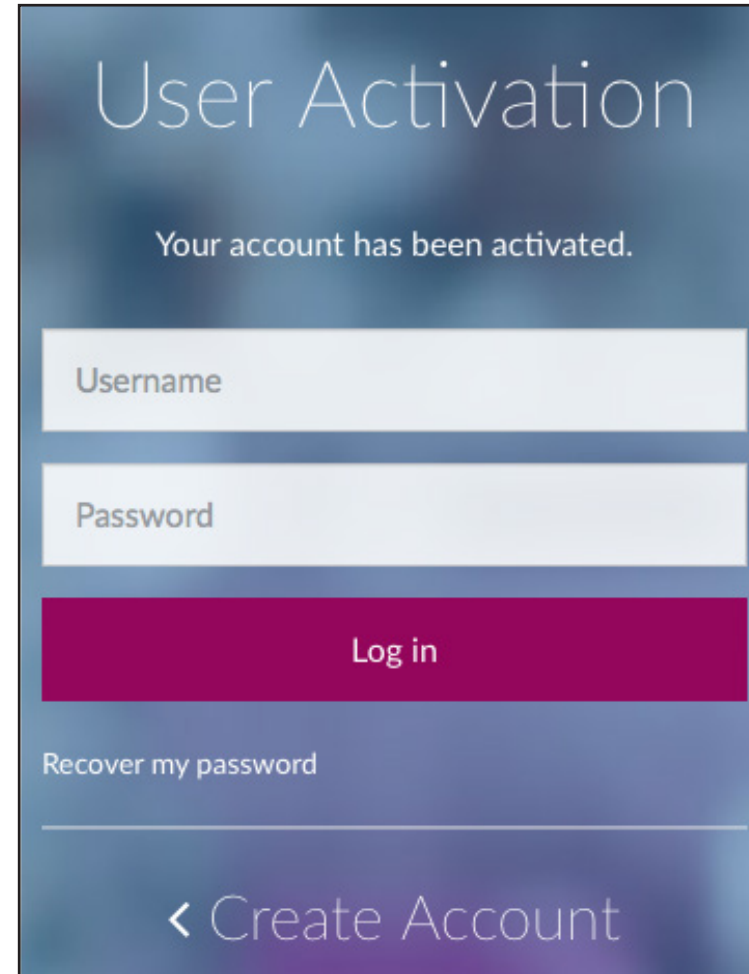
Enter your personal details and then click "Create Account."



Step 4

You will now be sent a verification email to the email address you provided. Please follow the activation link in the email to finalise your registration.

Please note, the activation link will expire within 2 hours of being sent.



Step 5

To log in, enter the username and password that you created.

Community Select Authorised Contractor System

For Questions or Assistance please call 1300 305 072

Pegasus
Powered by Onsite

User Profile

Account Details

Your account has not been activated. To activate you must follow the link in the activation email which was sent to you at the time your account was created. You may resend the activation email by pressing the 'Resend Account Activation Email' button

Username *

tester1

Change Password

Email

testing1@maildrop.cc

Change Email

Resend Account Activation Email

Personal Details

First Name

Tester

Last Name

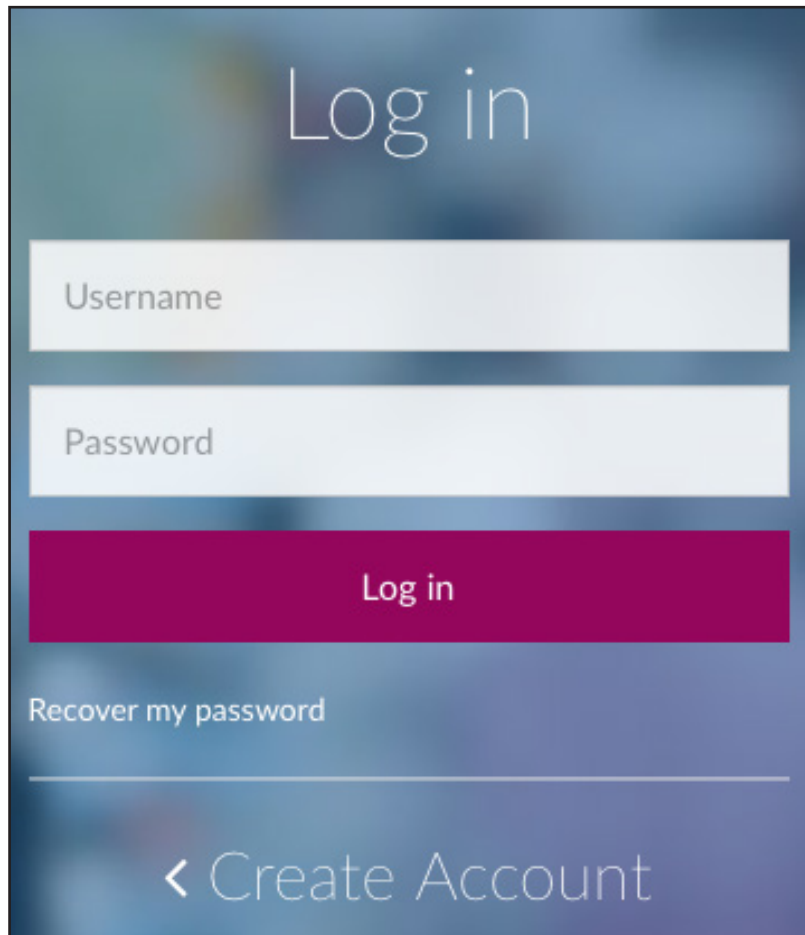
One

Please note

If the activation link you are sent expires, you will be redirected to this page.

Please complete the required information to resend your account activation link.

RECOVERING YOUR PASSWORD



Log in

Username

Password

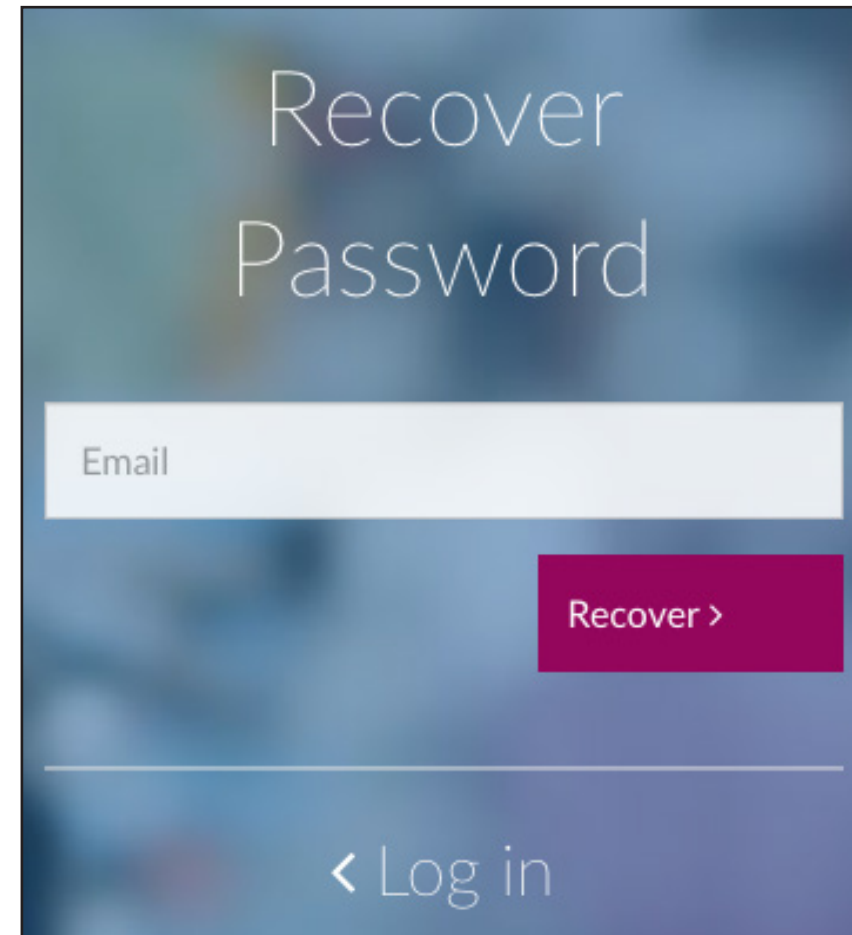
Log in

[Recover my password](#)

[< Create Account](#)

Step 1

Select "Recover my password."



Recover Password

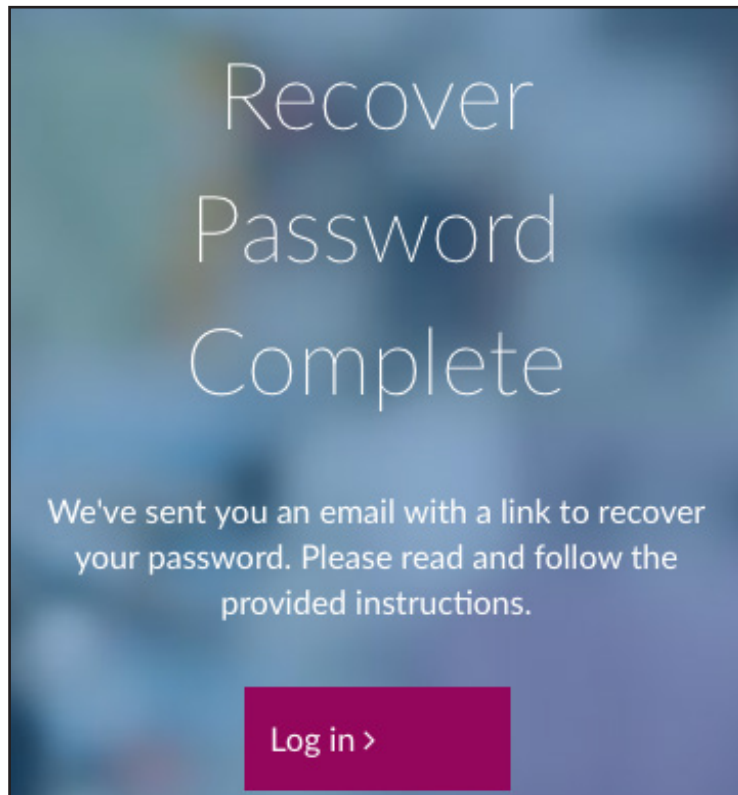
Email

Recover >

[< Log in](#)

Step 2

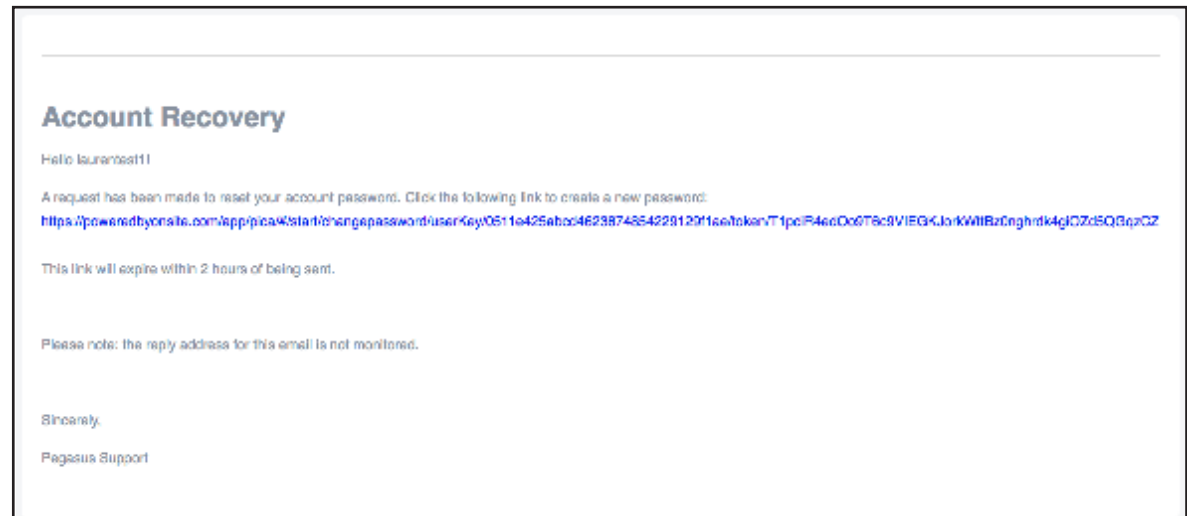
Enter your email and click "Recover."



Step 3

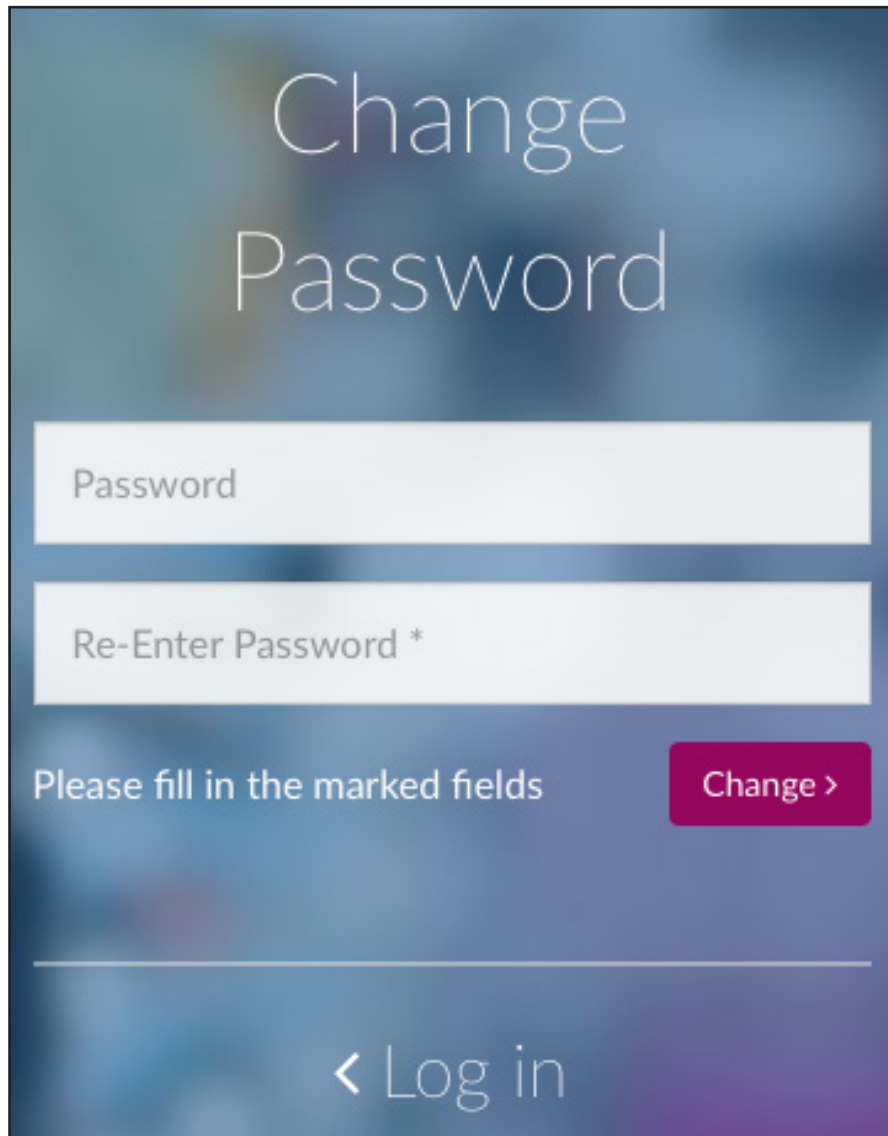
An automated email will be sent to you.

Please remember to check your junk mail.



Step 4

Once you receive the email to reset your password, click the link provided.



Change Password

Password

Re-Enter Password *

Please fill in the marked fields

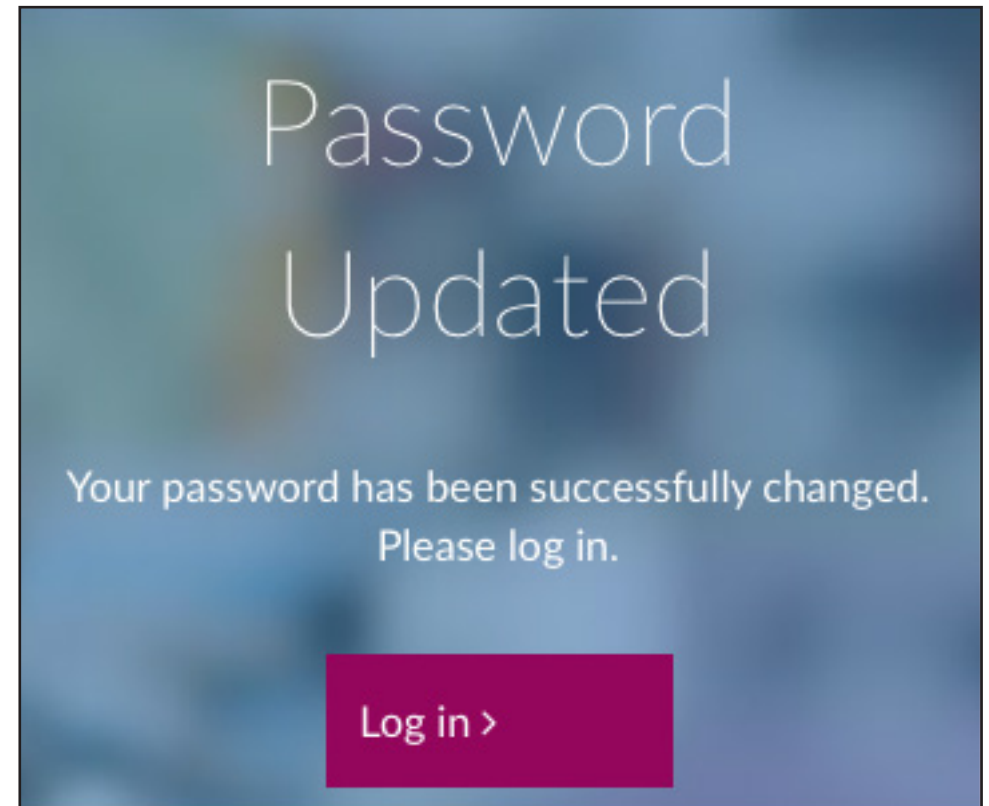
Change >

< Log in

This screenshot shows a 'Change Password' form on a blue gradient background. It features two input fields: 'Password' and 'Re-Enter Password *'. Below the fields is a text prompt 'Please fill in the marked fields' and a magenta button labeled 'Change >'. At the bottom, there is a back arrow and the text '< Log in'.

Step 5

Please enter your new password in both of the sections and click "Change."



Password Updated

Your password has been successfully changed.
Please log in.

Log in >


This screenshot shows a 'Password Updated' confirmation screen on a blue gradient background. It displays the message 'Your password has been successfully changed. Please log in.' and a magenta button labeled 'Log in >'.

Step 6

Your password has successfully been changed.

Please login using your username and new password.


REGISTERING YOUR BUSINESS



laurentest

Community Select Authorised Contractor System

For Questions or Assistance please call 1300 305 072


Powered by Onsite

Home

Register Business Details

Manage My Business Details

Manage My Office Locations

Logout

Business Details Registration

Please enter the ABN of your business (without spaces) and click 'Search'.

- If your business is listed in the results, click 'Register with this business'
- If your business is not listed in the results, click 'Register new business'

Don't know your ABN? [Find it here.](#)

ABN Search

ABN

Search

Step 1

Enter your business ABN into the field and click “Search.”

Business Details Registration

Select the country that your business operates in.

Australia Clear

Please enter the ABN of your business (without spaces) and click 'Search'.

- If your business is listed in the results, click 'Register with this business'
- If your business is not listed in the results, click 'Add this business'

Don't know your ABN? Find it here.

ABN Search

600076167 Search

Add this business

Search Results

Registered Business Name	ABN

Step 2

If your business exists in the system click “Register with this Business.” If your business is not listed click “Register New Business.”

Business Details Registration

Please complete the business details form below.

Business Details

Australia 12345678902

Registered Business Name

Trading Name

Contact Details

Lauren Test

lchock@pegasus.net.au

Mobile Phone

Physical Address

Address Line 1

Address Line 2

City/Town

State/Province ZIP/Postal code

☐ The business's postal address is different to its physical address.

Phone & Fax Details

Business Phone Business Fax

☐ I agree that I am the administrator of this company.

Request Registration

Step 3

Enter the business details in the form and click “Request Registration.”

Step 4

Please read the Business Registration information then click “Continue.”

Business Registration

Annual Subscription

Document Uploads

In order to become an authorised contractor, you must satisfy all criteria as set by Community Select and satisfactorily complete the following steps:

1. Complete all sections of the Business Registration Questionnaire, including the Contractor Work Health and Safety Agreement
2. Process payment to Pegasus for the verification and administration of your registration
3. Upload all relevant licenses and insurances as requested. You will need to upload current documents that can be verified against your ABN.

Please Note: Payments made to Pegasus are for the verification of uploaded insurances and licenses and review of safety management system documents.

Under no circumstances will a refund of fees be granted after the document verification process has commenced.

Continue

Step 5

Answer the business details, then select “Proceed.”

Please note

Sole Traders and Partnerships who trade under a different name to their ABN entity must upload a ASIC Business Registration Certificate. Joint Venture/Alliances and Companies will be required to upload a ASIC Business Registration Certificate.

Business Registration

Annual Subscription

Document Uploads

Business Details

Page 1 of 14

Save Progress

Which of the following represents your business type?¹

☐ Sole Trader

☐ Partnership

☐ Joint Venture/Alliance

☐ Company

Which States will you be working in? Please note Community Select will require licenses or workers compensation documentation for the states selected.

☐ New South Wales (NSW)

☐ Queensland (QLD)

☐ Victoria (VIC)

For this application you are required to provide a current Public and/or Product Liability Insurance Policy with a minimum value of \$10,000,000. Please ensure the policy is available with details of the set amount for the document upload. Business name listed on the certificate must match the business name registered in the portal. If not please upload a government certified document linking the names.¹

☐ I acknowledge and agree

Does your business undertake activities that could reasonably be expected to require a Professional Indemnity Insurance policy e.g. Specialised Advisory, Design , Consulting or Professional Services

☐ Yes

☐ No

In 50 words or less, describe the Products and/or Services offered by your Business

Back

Go to Page ~

Proceed

BUSINESS REGISTRATION

Business Registration

Annual Subscription

Document Uploads

Licences Scope - NSW

Page 2 of 14 Save Progress

Is there a licensing requirement to undertake the work you do within the state or states you have select? If so select from the list below only the class or classes of works named on your licence card as you will be required to upload a copy for verification.

- ☐ NSW Air-conditioning and Refrigeration Licence
- ☐ NSW Work Cover Asbestos Removal Licence - Class A (Friable)
- ☐ NSW Work Cover Asbestos Removal Licence - Class B (Non - Friable)
- ☐ NSW Building Contractor Licence
- ☐ NSW Erection of prefabricated metal framed home additions and structures Contractor Licence
- ☐ NSW Kitchens, Bathroom and Laundry Renovation Contractor Licence
- ☐ NSW Structural Landscaping Contractor Licence
- ☐ NSW Swimming Pool Building Contractor Licence
- ☐ NSW Underpinning Piering Contractor Licence
- ☐ NSW Bricklaying Contractor Licence
- ☐ NSW Carpentry Contractor Licence
- ☐ NSW Minor Trade Work Licence
- ☐ NSW Painting Contractor Licence
- ☐ NSW Stonemasonry Contractor Licence
- ☐ NSW Wall and Floor Tiling Contractor Licence
- ☐ NSW Waterproofing Contractor Licence
- ☐ NSW Wet Plastering Contractor Licence
- ☐ NSW Electrical Contractor Licence
- ☐ NSW Disconnection / Reconnect Electrical Licence
- ☐ NSW Disconnection / Reconnect Supervisor Certificate
- ☐ NSW Glazing Contractor Licence
- ☐ NSW Painting Contractor Licence
- ☐ NSW National Parks and Wildlife Permit
- ☐ NSW Plumbing, Draining & Gasfitting Licence
- ☐ NSW Plumbing Draining and Gasfitting (including LP gasfitting)
- ☐ NSW Swimming Pool Building Contractor Licence
- ☐ NSW Swimming Pool Repairs and Servicing Contractor Licence
- ☐ NSW Roof Plumbing Contractor Licence
- ☐ NSW Roof Slating Contractor Licence
- ☐ NSW Roof Tiling Contractor Licence
- ☐ NSW Master Security Licence
- ☐ NSW Security Licence Class 1
- ☐ NSW Security Licence Class 2
- ☐ None of the above

Back

Go to Page - Proceed

Business Registration

Annual Subscription

Document Uploads

Unlicensed Work Categories

Page 8 of 14 Save Progress

Select one or more of the following work categories for your company. Select ONLY categories for which you are able to provide a licence if there is a license requirement in this state. Please only select works that you are licenced to perform and not those where a subcontractor is engaged.

- ☐ Blinds & Awnings
- ☐ Building Management
- ☐ Cleaning
- ☐ Consultants & Prof. Services
- ☐ Doors & Windows
- ☐ Driveways & Carparks
- ☐ Electrical Appliances/Repairs
- ☐ Elevators
- ☐ Fire & Safety
- ☐ Flooring
- ☐ Furniture
- ☐ Telecomm & Tv Services
- ☐ Tree Services
- ☐ Waste Services
- ☐ Waterproofing
- ☐ Other Services
- ☐ None of the above

Back

Go to Page - Proceed

Step 6

Tick the categories which your business is licenced and certified to work, then click “Proceed.”

Tick the sub-categories that your business works in, then click “Proceed.”

Only select licences that are in your business name, individual licences will not be accepted and will cause delays in processing your application. These documents must match the ABN and trading names that have been provided so they can be verified against the entity. You will be prompted to upload copies of the licences selected during the document upload section .

Step 7

Please select state, region and sub region in which you conduct work, then click “Proceed.”

Please note you may be requested to provide licences and registrations in each state selected.

Business Registration
Annual Subscription
Document Uploads

Regions / Sub-Regions

Page 10 of 14

Save Progress

Which New South Wales regions do you work in?

☐ Central & Hunter Region
☐ Illawarra
☐ North Parramatta
☐ Parramatta
☐ Sydney Metro

Back

Go to Page ..

Proceed

Business Registration
Annual Subscription
Document Uploads

Regions / Sub-Regions

Page 10 of 14

Save Progress

Which New South Wales regions do you work in?

☒ Central & Hunter Region
☐ Illawarra
☐ North Parramatta
☐ Parramatta
☐ Sydney Metro

Which Central & Hunter sub-region?

☒ Hunter Region
☐ Central Coast
☐ Forster
☐ Nelson Bay

Back

Go to Page ..

Proceed

Business Registration

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Document Uploads

Accreditations

Is your business certified to ISO 9001?

Yes

No

Back

Go to Page -

Proceed

Step 8

Answer and complete the questions, then click “Proceed.”

Business Registration

Annual Subscription

Document Uploads

Code of Conduct

I acknowledge that I have read and understood the attached Contractor Code of Conduct and agree to comply with it at all times during the provision of goods and services as a Community Select contractor.

[Download a copy of the code of conduct here](#)

I acknowledge and agree

Back

Go to Page -

Proceed

Step 9

Download and read the Code of Conduct from the available link, tick to acknowledge and agree, then click “Proceed.”

Business Registration

Annual Subscription

Document Uploads

Contractor Work, Health and Safety Agreement

Page 13 of 14

Save Progress

✖ Download a copy of the Contractor Work, Health and Safety Agreement [here](#)

I acknowledge that I have read and understood the attached Contractor Work, Health and Safety Agreement and agree to comply with it at all times during the provision of goods and services as a Community Select contractor.

☐ I Agree

← Back

Go to Page ~

Proceed →

Step 10

Download and read the Contractor Work, Health and Safety Agreement, tick to agree, then click “Proceed.”

Business Registration

Annual Subscription

Document Uploads

WHS Evidence

Page 14 of 14

Save Progress

✖ All contractors must read and sign the WHS declaration before you will be compliant in the Community Select Contractor Authorised system. The document will be prompted as part of the document upload section after subscription. The WHS declaration can be found [here](#), all sections must be completed and will be verified.

☐ I agree

✖ Do you have any further evidence of how you comply and practice work, health and safety requirements for your business? Acceptable document uploads include WHS policies, SWMS or evidence of a safety management system.

☐ Yes

☐ No

← Back

Go to Page ~

Proceed →

Step 11

Read the WHS Evidence statements, answer the statements, then click “Proceed.”

Business Registration

Annual Subscription

Document Uploads

Questionnaire Summary

Business Details Update answers	>
Licences Scope - NSW Update answers	>
Unlicensed Work Categories Update answers	>
Regions / Sub-Regions Update answers	>
Accreditations Update answers	>
Code of Conduct Update answers	>
Contractor Work, Health and Safety Agreement Update answers	>
WHS Evidence Update answers	>

< Back

Submit Answers

Step 12

Please check your answers and uploads, then select “Submit Answers.”

If you need to edit an answer, select “Back.”

PURCHASING YOUR ANNUAL SUBSCRIPTION

PURCHASING YOUR ANNUAL SUBSCRIPTION

Business Registration

Annual Subscription

Document Uploads

Payments made to Pegasus are for the verification of uploaded documentation.

Under no circumstances will a refund of fees be granted after the document verification process has commenced.

If you are ready to proceed please go to the next page to make your payment by Credit Card through Paypal or via a Paypal account. Once the payment has been completed a tax invoice will be generated automatically.

Continue

Step 1

Select “Continue” to proceed to the annual subscription payment process.

Business Registration

Annual Subscription

Document Uploads

You need to purchase the following subscription(s):

Subscription type	Duration	Expires	Cost	Tax	Total
Annual Subscription	1 year	31 Jan 2018	\$100	\$10	\$110

Subscription calculation based on:

paypal

Total \$110 AUD

Pay

Step 2

Select your preferred payment option from the dropdown, then select “Pay.”

PURCHASING YOUR ANNUAL SUBSCRIPTION

The screenshot displays a PayPal checkout interface. On the left, a 'Your order summary' box contains a table with the following data:

Descriptions	Amount
Subscription Costs: Category 2 (1 Y...	\$400.00
Item price: \$400.00	
Quantity: 1	
Item total:	\$400.00
GST:	\$40.00
Total	\$440.00 AUD

On the right, the 'Choose a way to pay' section offers two main options:

- Pay with my PayPal account**: Includes a 'Log in to your account to complete the purchase' instruction, a text input for 'Email' (containing 'test_person@pegasus.net.au'), a text input for 'PayPal password', a checkbox for 'This is a private computer. What's this?', a 'Log in' button, and a link for 'Forgotten your email address or password?'.
- Pay with a credit or debit card**: Includes the text '(Optional) Sign up to PayPal to make your next checkout faster'.

At the bottom of the payment section is a link: 'Cancel and return to Test Business's Test Store.'

Below the main content area, there is a 'Site Feedback' link and a footer containing privacy and security information, including links to 'User Agreement', 'Combined Financial Services Guide and Product Disclosure Statement', and 'Privacy Policy'. The footer also includes copyright information for PayPal Australia Pty Limited.

Step 3

You can pay for your subscription using the following options:

1. Using an existing PayPal account

If you choose to pay via PayPal, you have the option to save these details and create an account with PayPal.

2. Pay with a Credit or Debit Card

Please note you do not need to have a PayPal account to make payment by selecting the Pay with a credit or Debit Card option.

Business Registration

Annual Subscription

Document Uploads

Payment successful. Please click next to continue with the process.

Product	Description	Cost	Tax	Total Cost
Annual Subscription: Annual Subscription (1 year)	Annual Subscription	\$100	\$10	\$110

Total \$110 AUD

View Invoice

Next

Step 4

Once your payment has been executed successfully you can view and save the invoice. To continue click "Next."

UPLOADING COMPANY DOCUMENTS

UPLOADING COMPANY DOCUMENTS

Business Registration

Annual Subscription

Document Uploads

Document Uploads

Please proceed with document upload by clicking on the upload document button. Note, if the same document appears multiple times, you will only be required to upload it once.

Certificate	Documents		Status
Public and/or Product Liability Insurance	Upload the following document Public and/or Product Liability Insurance (min \$10M)	<button>Upload Document</button>	Not Complete
WHS Declaration	Upload the following document WHS Declaration	<button>Upload Document</button>	Not Complete

Step 1

Upload all of the requested documents by clicking “Upload Document.”

Business Registration

Contractor Work, Health and Safety Agreement

Annual Subscription

Document Uploads

SMS Review

< NSW Electrical Contractor Licence



Upload File

Drag a file here to add it.

Select File

Maximum File Size 10 MB
Supported Media Types JPEG Image, Microsoft Word File, PNG Image, PDF File, Text File

Enter Additional Information

Start Date * 19/04/2016  End Date 

Comment

BackSubmit

History >

Step 2

Click “Select File” or drag and drop the file into the white rectangle to add the file.

Fill out any mandatory fields before clicking “Submit.”

UPLOADING COMPANY DOCUMENTS

Business Registration

Annual Subscription

Document Uploads

Document Uploads

Please proceed with document upload by clicking on the upload document button. Note, if the same document appears multiple times, you will only be required to upload it once.

Certificate	Documents		Status
Public and/or Product Liability Insurance	Upload the following document ✓ Public and/or Product Liability Insurance (min \$10M)	<button>View Document</button>	Pending Verification
WHS Declaration	Upload the following document ✓ WHS Declaration	<button>View Document</button>	Pending Verification

Next

Step 3

Once all of the documents have been uploaded and their status is showing as “Complete” click “Next” to continue.

Please note that the “Next” button will only appear once all the documents have been uploaded.

Business Registration

Annual Subscription

Document Uploads

Thank You

Your business profile has now been created. If we have any questions regarding your application or documentation one of our friendly staff will contact you using the details you have provided.

By clicking on the submit button on this page, your profile and documents will be lodged for verification, and you will be returned to the home page. From here you can continue with the next step in the process by creating additional office locations and contacts.

Clicking on the Manage My Office Locations tile will allow you to create additional office locations and enter address and contact details for these locations.

Clicking on the Manage My Business Details tile will allow you to edit your business information and edit or create new contact details.

Submit

Step 4

Your business registration will now be reviewed by Pegasus.

Pegasus will contact you via email if there are any returned documents that require your attention.

If no corrective actions are required, then an approval email will be sent once verification has been completed.

MANAGE MY BUSINESS DETAILS

MANAGE MY BUSINESS DETAILS



Step 1

After registering your business in the Contractor Authorisation System you will need to manage your business details. This includes business details, compliance, documents and transaction history.

To manage your business details from the home page select the “Manage my Business Details” tile. You can also select the “Manage my Business Details” in the menu down the left hand side of the page.

Step 2

To update or edit your business details ensure you have selected “Details” from the tabs under the “Manage my Business Details” header.

Make any required adjustments then select “Save.”

MANAGE MY BUSINESS DETAILS

< Manage My Business Details ✓

Detail **Contacts** Compliance Document Library Transaction History

Search [] []

Add +

Name	Address	Phone
------	---------	-------

Step 3

To add a new business contact, select “Add.”

< Active [] Cancel Save

Name *

Email Addresses Add +

Email	Primary
-------	---------

Addresses Add +

Type	Address	Primary
------	---------	---------

Phone Numbers Add +

Type	Phone	Primary
------	-------	---------

Step 4

Please select “Add” for each section of information: Email Address, Address and Phone number.

New Email

Primary Email []

Please enter a valid email address *

[]

Cancel Save

Step 5

Enter the email address that you wish to associate to this business contact. You have the option to make this the primary email by sliding the “Primary Email” bar to the right.

MANAGE MY BUSINESS DETAILS

New Address

Type *

Primary Address

Country *

Australia

Address Line 1 *

Address Line 2

City/Town *

State/Province *

Postal/Zip Code *

Cancel

Save

Step 6

Enter the new address that you wish to associate to this business contact. You have the option to make this the primary address by sliding the “Primary Address” bar to the right.

New Phone Number

Type *

Primary Phone Number

Number *

Cancel

Save

Step 7

Enter the new phone number that you wish to associate to this business contact. You have the option to make this the primary phone number by sliding the “Primary Phone Number” bar to the right.

MANAGE MY BUSINESS DETAILS

<

Active ☒ Cancel Save

Name *

Email Addresses

Add +

Email

Primary

Addresses

Add +

Type

Address

Primary

Phone Numbers

Add +

Type

Phone

Primary

Step 8

Once all of the new information has been added, select “Save.”

< Manage My Business Details

Detail **Compliance** Document Library Transaction History

Overview

1/1 Subscriptions 56/56 Certificates 1/1 Other

Subscriptions

Search

Name	Description	Expiry Date	Status
Category 2	Category 2: Not AS/NZS 4801 Certified. Requires an SMS Review	15/02/2017	Active

Certificates

Search

Name	Status
SMS Certificate	Active
NSW - Sound Proof Windows	Active
NSW - Kitchen Renovations	Active
NSW - Metal Fabrication	Active
NSW - Gutter repairs	Active
NSW - Roof Tiling	Active
NSW - Shopfronts	Active
Workers Compensation Insurance NSW	Active
NSW - Concrete Services	Active
NSW - Glass Enclosures	Active

<

1

2

3

4

5

6

>

Total: 56

10

25

50

100

Step 9

To view your business’s compliance, select “Compliance” from the tabs under the “Manage my Business Details” header. Here you can view subscriptions, certificates and other areas of compliance.

MANAGE MY BUSINESS DETAILS

< Manage My Business Details

Detail Contacts Compliance Document Library Transaction History

Search

Name	Description	Issue Date	Expiry Date	Status	
NSW Building Contractor Licence	NSW Building Contractor Licence	22/02/2016	25/06/2018	Approved	View Document
NSW Electrical Contractor Licence	NSW Electrical Contractor Licence	3/01/2016	3/01/2017	Approved	View Document
Public and/or Product Liability Insurance	Minimum \$20M Cover	9/03/2015	30/09/2016	Approved	View Document
Workers Compensation Insurance NSW	Workers Compensation Insurance NSW	23/02/2016		Not ready	
ASIC Business Registration Certificate	ASIC Business Registration Certificate	13/10/2011	13/10/2016	Approved	View Document
Workers Compensation Insurance Qld	Workers Compensation Insurance Qld	7/01/2015	30/06/2016	Approved	View Document
Workers Compensation Insurance NSW	Workers Compensation Insurance NSW	22/10/2015	30/09/2016	Approved	View Document
Workplace Health & Safety Policy	Workplace Health & Safety Policy	8/03/2016		Approved	View Document
Workplace Health & Safety Policy	Workplace Health & Safety Policy	9/03/2016		Approved	View Document
Risk Management Methodology	Risk Management Methodology/Example	9/03/2016		Approved	View Document

1 2 3 4 5 Total: 42 10 25 50 100

Step 10

You can view the details of a specific certificate by clicking on its name.

<

Required Documents

Upload the following document

[View Document](#)

Step 11

You can view the document that was uploaded against this certificate by selecting the “View Document” button.

< Manage My Business Details

Detail Contacts Compliance Document Library Transaction History

Start Date End Date

Only Complete

Invoice No.	Type	Payment Date	Total	Complete	Invoice
3000000337	Purchase	15 Feb 2016 2:46:38 pm	\$440.00	Yes	View Invoice

Total: 1 10 25 50 100

Step 12

To view the business’s transaction history, select “Transaction History” from the tabs under the “Manage my Business Details” header.

MANAGE OFFICE LOCATIONS

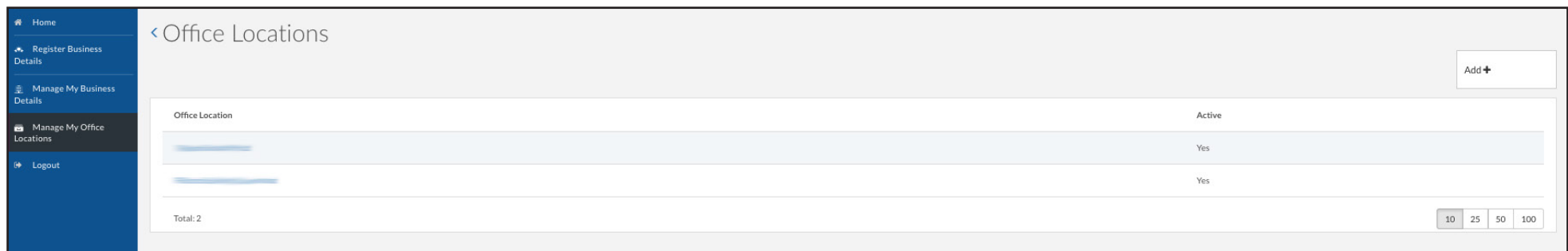
MANAGE MY OFFICE LOCATIONS



Step 1

After registering your business in the Contractor Authorisation System you will need to manage your office locations.

To manage your office locations from the home page select the “Manage my Office Locations” tile. You can also select the “Manage my Office Locations” in the menu down the left hand side of the page.



Step 2

To add a new office location, select “Add.”

Office Location

Name *

Description

Email *

Contact Name *

Cancel Continue

Step 3

Enter the required details of the office location and select "Continue."

< Office Locations

Add +

Office Location	Active
	Yes
	Yes

Total: 2

10 25 50 100

Step 4

You will now need to provide contact details for the newly created office location. To do this, please click on the name of the new location.

MANAGE MY OFFICE LOCATIONS

The screenshot shows a web interface for managing a contact named 'Test'. At the top, there are tabs for 'Details', 'Contacts', and 'Categories'. The 'Details' tab is active. On the right side, there is an 'Active' toggle switch (currently turned on), a 'Cancel' button, and a 'Save' button. The main form area contains several sections: 'Name' with a text input field containing 'Test'; 'Description' with a text area; 'Email Addresses' with an 'Add' button and a table with columns 'Email' and 'Primary'; 'Addresses' with an 'Add' button and a table with columns 'Type', 'Address', and 'Primary'; and 'Phone Numbers' with an 'Add' button and a table with columns 'Type', 'Phone', and 'Primary'. Each table has a single empty row for data entry.

Step 5

Please select “Add” for each section of information: Email Address, Address and Phone number.

The screenshot shows a 'New Email' form. At the top, the title 'New Email' is displayed. Below it, there is a 'Primary Email' section with a toggle switch (currently turned off). Underneath, there is a validation message 'Please enter a valid email address' followed by a text input field. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

Step 6

Enter the email address that you wish to associate to this business location. You have the option to make this the primary email by sliding the “Primary Email” bar to the right.

MANAGE MY OFFICE LOCATIONS

New Address

Type *

Primary Address

Country *

Australia

Address Line 1 *

Address Line 2

City/Town *

State/Province *

Postal/Zip Code *

Cancel

Save

Step 7

Enter the address that you wish to associate to this business location. You have the option to make this the primary address by sliding the “Primary Address” bar to the right.

New Phone Number

Type *

Primary Phone Number

Number *

Cancel

Save

Step 8

Enter the new phone number that you wish to associate to this business location. You have the option to make this the primary phone number by sliding the “Primary Phone Number” bar to the right.

MANAGE MY OFFICE LOCATIONS

This screenshot shows the 'Test' location details form. At the top, there are tabs for 'Details', 'Contacts', and 'Categories'. The 'Details' tab is active. The form includes fields for 'Name' (containing 'Test'), 'Description', 'Email Addresses', 'Addresses', and 'Phone Numbers'. Each of these sections has an 'Add' button with a plus icon. The 'Email Addresses' section shows a table with columns for 'Email' and 'Primary'. The 'Addresses' section shows a table with columns for 'Type', 'Address', and 'Primary'. The 'Phone Numbers' section shows a table with columns for 'Type' and 'Primary'. At the top right, there is an 'Active' toggle switch, a 'Cancel' button, and a 'Save' button.

Step 9

Once all of the new information has been added, select “Save.”

This screenshot shows the 'Test' location contacts list. The 'Contacts' tab is active. At the top, there is a search bar and an 'Add' button with a plus icon. Below the search bar is a table with columns for 'Name', 'Address', and 'Phone'. The table contains one entry: 'Lauren Test'.

Step 10

To view the location’s contact details, select “Contacts” from the tabs under the location name header.

To edit or view specific contact details, click on the name of the contact.

To add a new contact, select “Add.”

This screenshot shows the 'Lauren Test' contact details form. At the top, there are tabs for 'Details', 'Contacts', and 'Categories'. The 'Contacts' tab is active. The form includes fields for 'Name' (containing 'Lauren Test'), 'Email Addresses', 'Addresses', and 'Phone Numbers'. Each of these sections has an 'Add' button with a plus icon. The 'Email Addresses' section shows a table with columns for 'Email', 'Primary', and 'Yes'. The 'Addresses' section shows a table with columns for 'Type', 'Address', and 'Primary'. The 'Phone Numbers' section shows a table with columns for 'Type' and 'Primary'. At the top right, there is an 'Active' toggle switch, a 'Cancel' button, and a 'Save' button.

Step 11

Please select “Add” for each section of information: Email Address, Address and Phone number. Enter the information required and select “Save.”

You can make any of these entries the primary information for the location by sliding the “Primary” bar to the right.

Once all of the new information has been added, select “Save.”

MANAGE MY OFFICE LOCATIONS



< Test

Details Contacts Categories

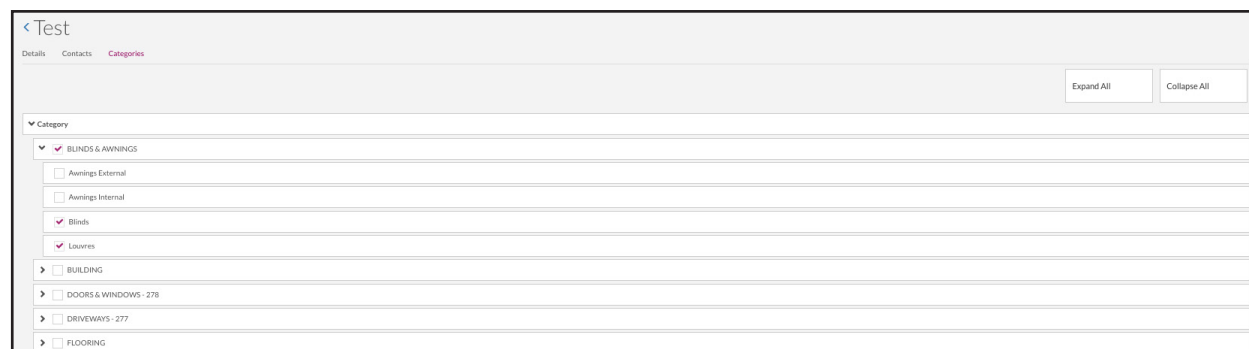
Expand All Collapse All

Category

Region

Step 12

You may choose to specify both the category that you are licenced to work in and the regions that you are licenced to complete work. To view and edit the location's category details, select "Categories" from the tabs under the location name header. To expand and view the categories and regions, click on the down arrow for each.



< Test

Details Contacts Categories

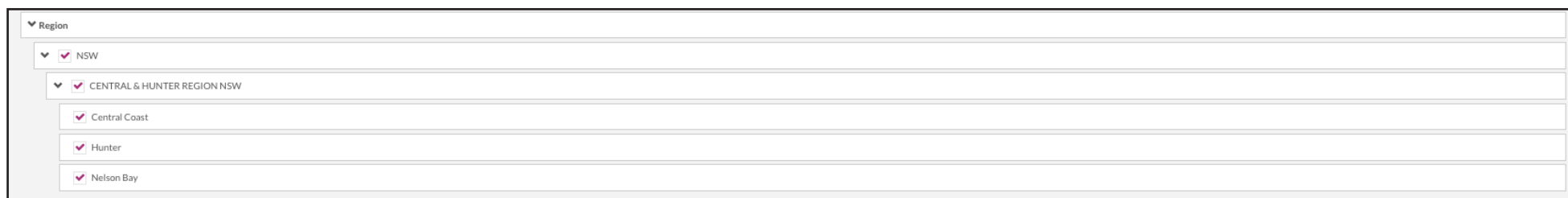
Expand All Collapse All

Category

- ☒ BLINDS & AWNINGS
 - ☐ Awnings External
 - ☐ Awnings Internal
 - ☒ Blinds
 - ☒ Louvers
- ☐ BUILDING
- ☐ DOORS & WINDOWS - 278
- ☐ DRIVEWAYS - 277
- ☐ FLOORING

Step 13

Tick the categories that you are licenced to work in.



< Test

Details Contacts Categories

Expand All Collapse All

Region

- ☒ NSW
 - ☒ CENTRAL & HUNTER REGION NSW
 - ☒ Central Coast
 - ☒ Hunter
 - ☒ Nelson Bay

Step 14

Tick the regions that you are licenced to work in.

Please note, once you have ticked all of the categories and regions that you are licenced to work in, the categories section will save automatically.



For questions or assistance please call 1300 305 072
or email communityselect@pegasus.net.au