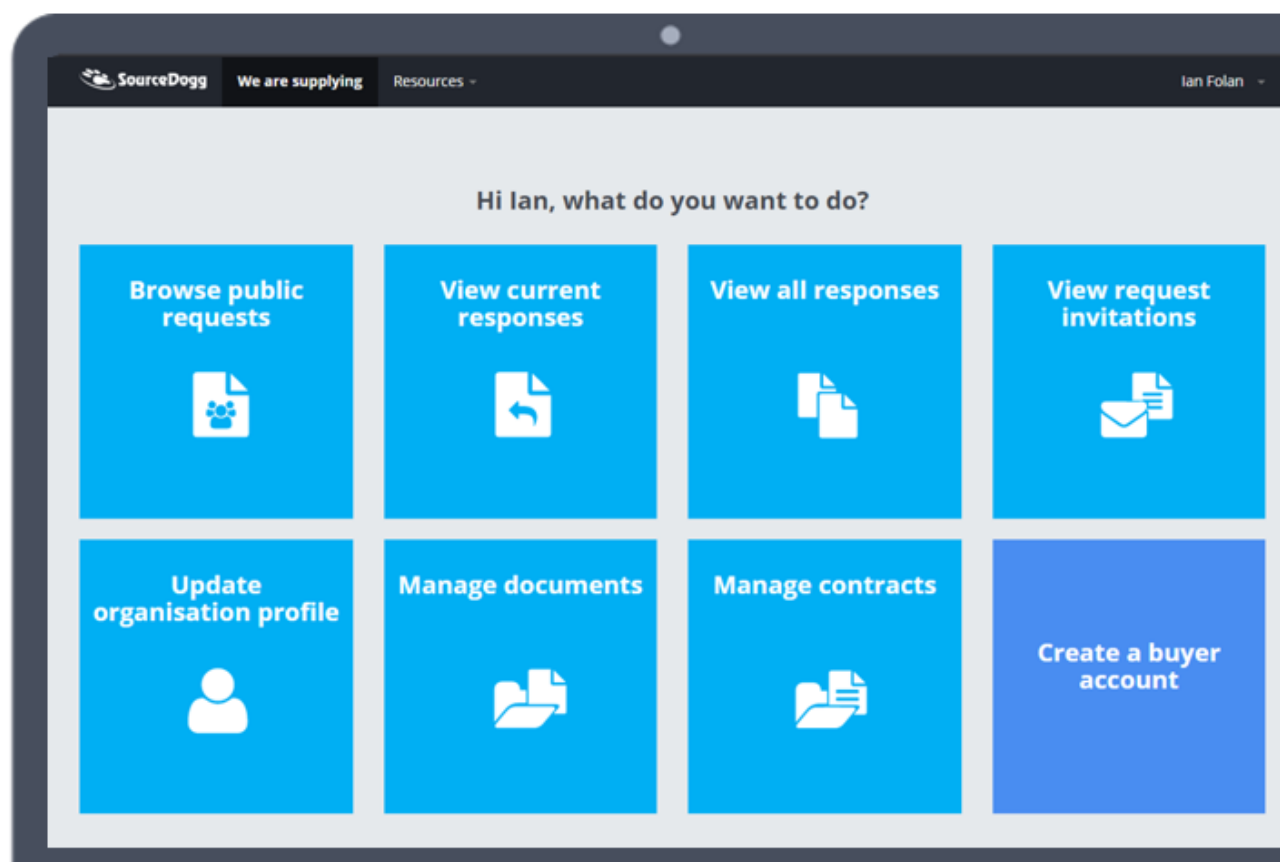# Free SourceDogg Supplier Account

Managing Certification

Date: April 2018

Contents

Accessing 'Certifications' section

Access Certifications through a link in the email

When any of your certificates need to be updated, SourceDogg will send you an email reminder. To access the 'Certifications' section simply click on a link in the email that includes your company name.
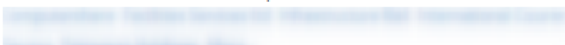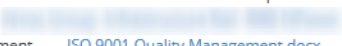

You will be taken to the SourceDogg login page and once you log in you will be directed to 'Certifications' section with the list of all previously uploaded certificates.

Access Certification through SourceDogg Account

Once you are logged into your SourceDogg account, you can access the 'Certifications' section in 2 ways:
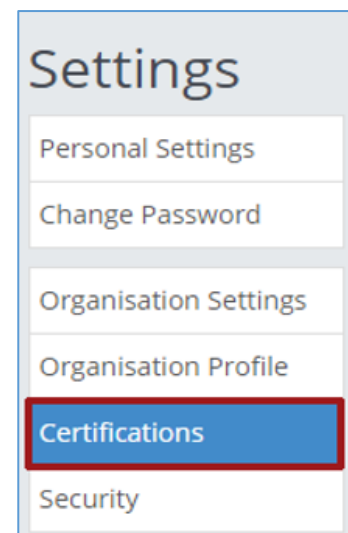
1. By selecting 'Update organisation profile' from the tiles on your homepage
2. By clicking on your name at the top right corner and selecting 'Settings' in the drop-down menu
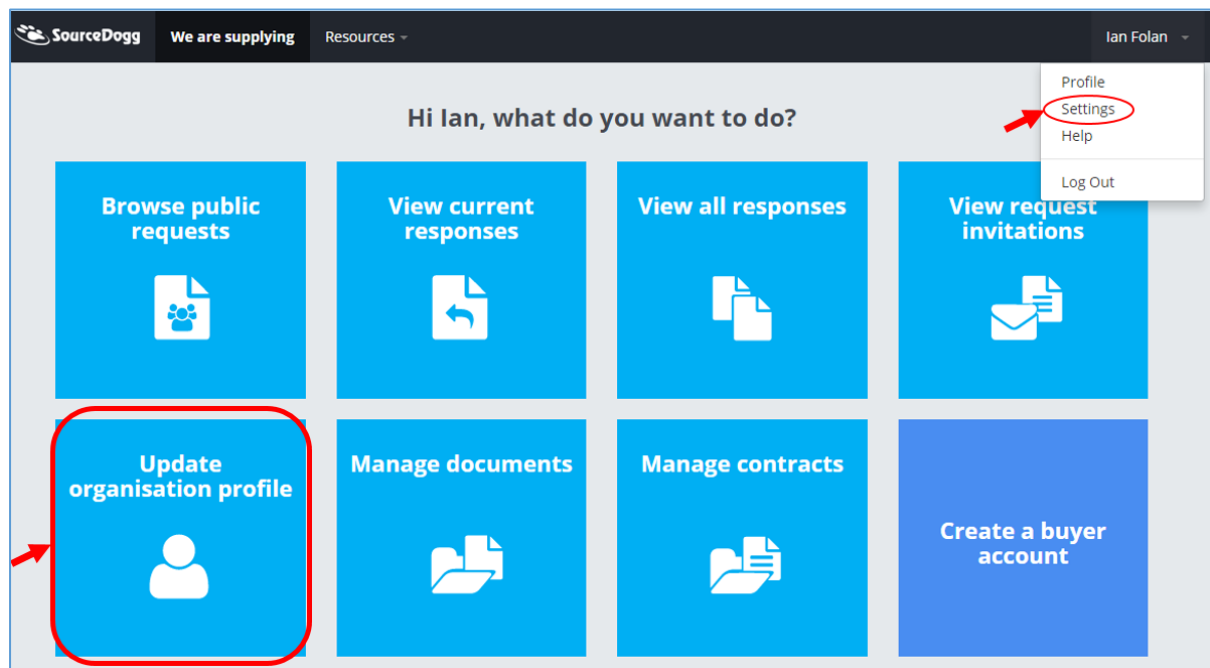
Both ways will take you to a view of the 'Settings' section with the 'Settings' menus on the left-hand side of the screen.

From the 'Settings' menu list please select 'Certifications'.

You will be directed to 'Certifications' section with the list of all previously uploaded certificates.

Certifications – basic navigation

The main view of the 'Certifications' section is a list of all previously uploaded certificates.

You can easily create a new Certification which will be added to an existing list. To do so follow the steps in the Create new Certification guide (page 21).

Every certification can be either **viewed** by clicking on the blue 'Certification Details' button or **edited** by clicking on the green 'Update Certification' button. Using the 'Update Certification' button will allow you to make the certificate obsolete, select the most current certificate, or change the title of the certification.

A certification consists of one or more certificates, that are listed below the Certification name.

Certificate with a button selected is the one that has been chosen as **'Current One'** among all certificates in that Certification. Its details, including expiry date, are taken as the current details of that Certification.

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	Certificate:	Employers Liabiliaty Insurance			
✖	Issued on	15 Oct 2017	Expires on	28 Nov 2019	◉
	Issued by	-	Cert Number	7777	
	Date Created	17 Oct 2017	Attachment	EMPLOYERS LIABILITY INSURANCE.docx	

'Shared with' – displays names of all Buyer Organisations, the certificate has been shared with either by responding to a certificate question in a request, sharing the certificate publicly

Change the title of the certification by typing here

Certification: ISO 1461:1999 Hot dip galvanizing

Add Certificate

✖	Issued on	01 Apr 2018	Expires on	30 Apr 2019
	Shared with	International Courier Service		

☐ Visible On Public Profile

Mark as current ❓

Click to add a updated version of certificate

✖	Certificate:	Hot Dip galvanizing			◉
	Issued on	01 Apr 2018	Expires on	30 Apr 2019	
	Issued by	Hot dip authority	Cert Number	15649/496/49	
	Date Created	11 Apr 2018	Attachment	Insurance Statement.pdf	

The most current Certificate in this Certification

✖	Certificate:	ISO 1461:1999 Hot dip galvanizing			○
	Issued on	-	Expires on	-	
	Issued by	-	Cert Number	-	
	Date Created	-	Attachment	-	

Cancel Save

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Making Certification Visible or Not Visible on Public Profile

Make your Certification Visible on Public Profile

To make Certification visible to all Buyer Organisations click the green 'Update Certification' button.

This enables editing options and now you can apply a tick to 'Visible On Public Profile. Once this is done, click the 'Save' button to apply changes.

Your Certification is now visible to all Buyer Organisations.

Make your Certification NOT Visible on Public Profile

To make Certification NOT Visible to other Buyer Organisations, apart from the ones listed, click the green 'Update Certification' button.

This enables editing options and you can now untick the 'Visible On Public Profile' option. Once this is done, click the 'Save' button to apply your changes.

Your Certification is now visible only to Buyer Organisations listed in the 'Shared with' section.

Update Certification

To update Certification go to 'Certifications' section. (Click here for instruction on how to access 'Certifications' section).

The main view of the 'Certifications' section is a list of all previously uploaded certificates.

The expiry date of certificates that are out of date, is displayed in red.

To update a certification that includes an expired certificate, click the green 'Update Certification' button, next to the expiry date.

A pop-up window will appear with a form to fill in details of new/renewed certificate.

Fill in required details, attach Certificate Document and click 'Save'.

The newly created Certificate is now added to the Certification and is automatically taken as the most current one among all Certificates in that Certification and its details are now displayed.
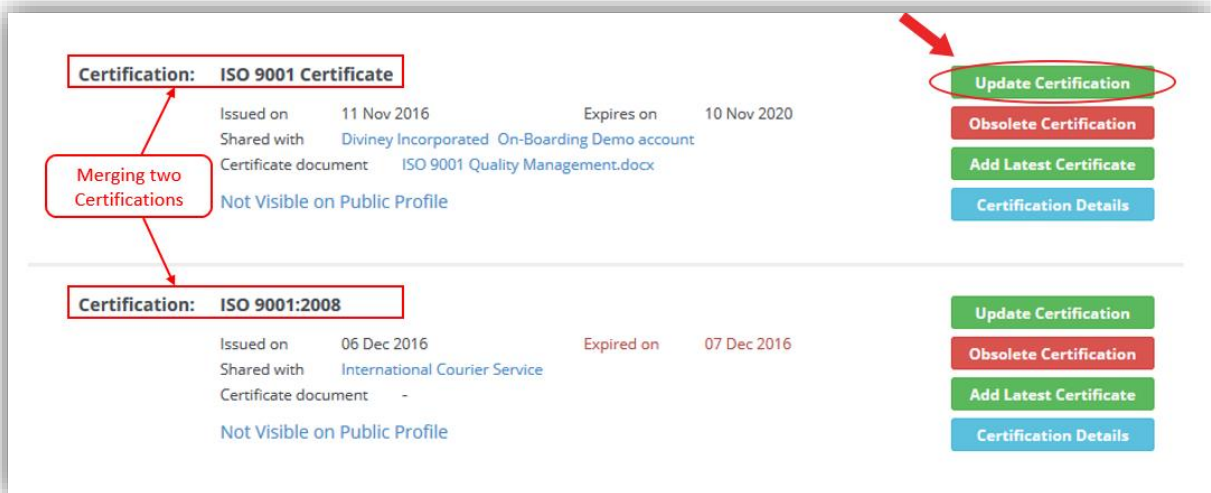
Merging Certifications

In some circumstances, you may need to group certifications together.

Common scenarios would be:

1. In the past, you had separate Insurance Certifications for Employers Liability, Public Liability, and Product Liability, and now all of them are covered under one Liability Insurance Certification.
2. You have accidentally created a duplicate certificate rather than updating an existing cert.

To merge Certifications please follow the steps below:

Navigate to Certification you want to merge with other Certifications and click 'Update Certification'

This enables the editing options and will allow you to merge Certifications together. To do so, click the green 'Add Certificate' button.
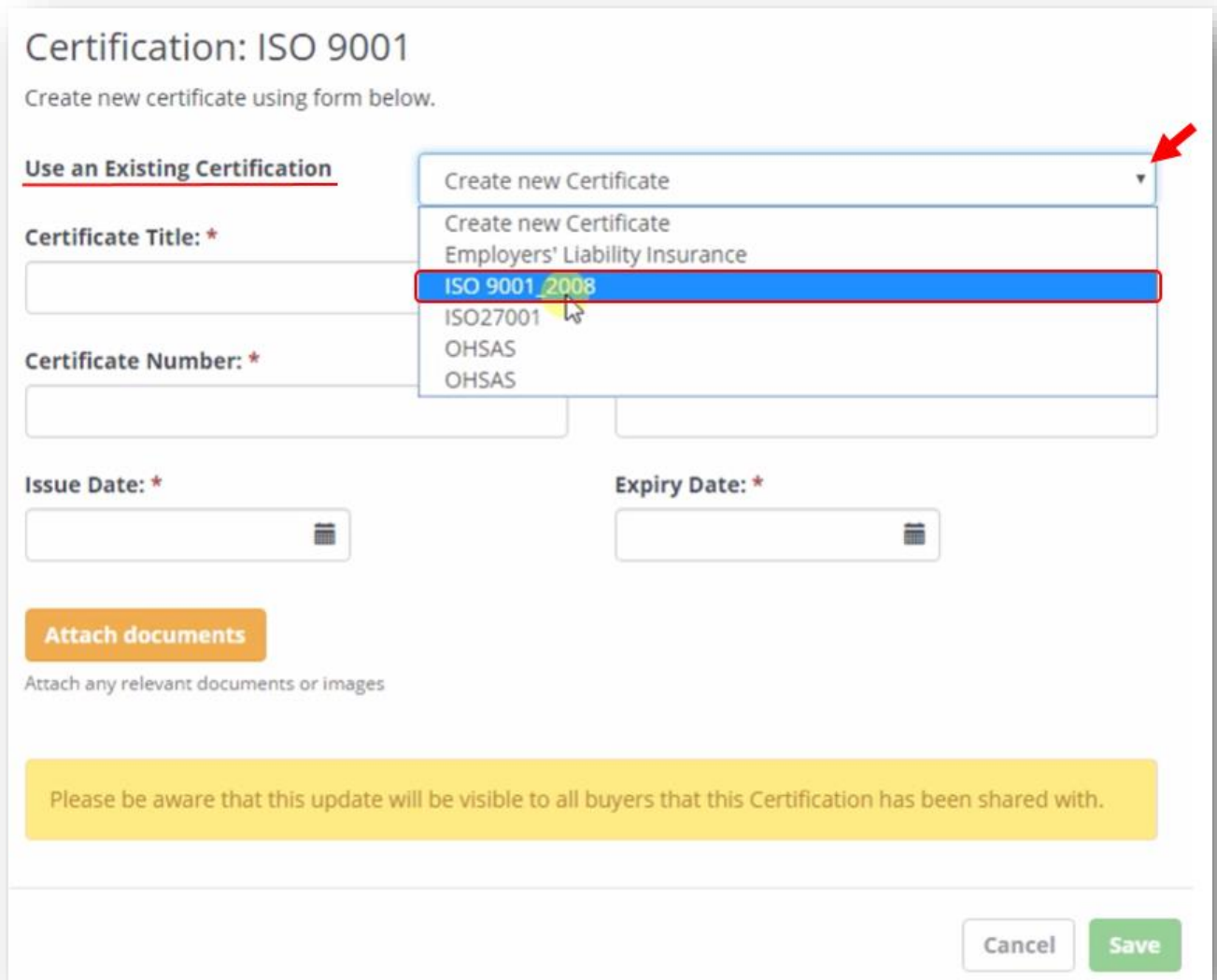
When the pop-up window appears, please click on the 'Use an Existing Certification' drop-down menu.

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The first option is 'Create new Certificate'after which follows a list of all existing Certifications. Select the Certification you want to merge.

Once the Certification has been selected, the fields on Certification form gets filled in automatically along with any attachments. And you can now 'Save' changes to complete merging.

Once the above steps are complete you will see that all merged Certifications are now under one Certification.

You can also select which of the Certificates within the group of merged Certifications, is up to date, and therefore, its details should be taken as current details of that Certification.

To do so, click on the green 'Update Certification' button to enable the editing options and navigate to the column 'Mark as current' at the left-hand side.

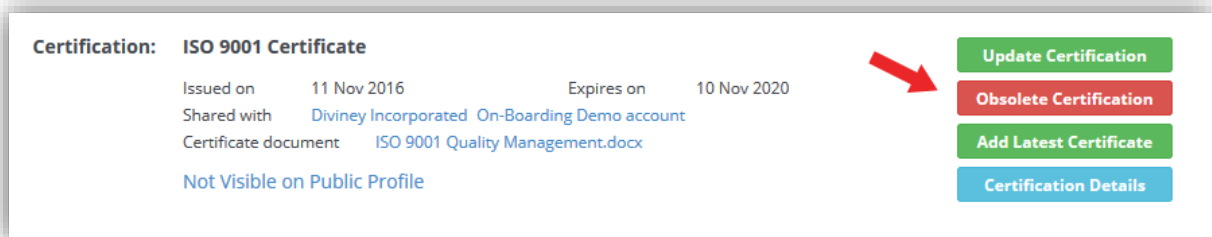Select the most valid Certificate and click 'Save' to apply changes.
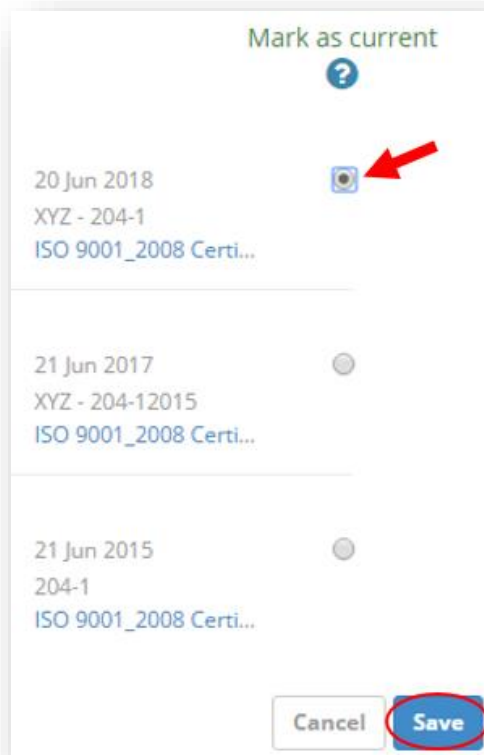
Mark a Certification/Certificate as OBSOLETE

In some circumstances, you may need to delete a Certification or Certificate (for example if you have created a duplicate by mistake).

SourceDogg will not allow you to delete any previously created certificates, or provided to Buyer Organisation Certification.

Instead, you can make a Certificate/Certification OBSOLETE, and state your reason for doing so. This information is accessible to Buyers you have shared the Certification with.

To make a Certificate/Certification OBSOLETE, click on the red 'Obsolete Certification' button.

This will open a pop-up window where you can select the reason for making the certificate obsolete. Select one of the options or select 'Other' and enter the details.

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Now you can easily identify Certificates and Certifications you have marked as OBSOLETE

- Single Certificate within Certification marked as OBSOLETE:

- Certification marked as OBSOLETE:
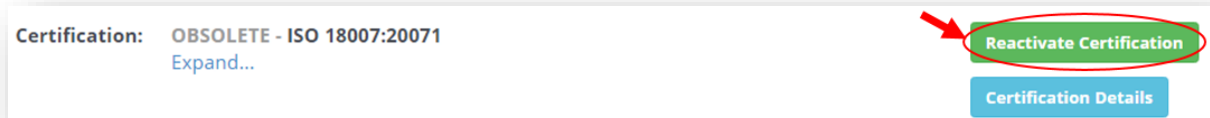

You can reactivate an OBSOLETE Certification at any time.

To do so please refer to Reactivating an OBSOLETE Certification section of the guide.

Reactivating an OBSOLETE Certification

To Reactivate an OBSOLETE Certification, navigate to selected Certification and click on the green button 'Reactivate Certification.

When you do so, a pop-up window will appear to confirm reactivation.
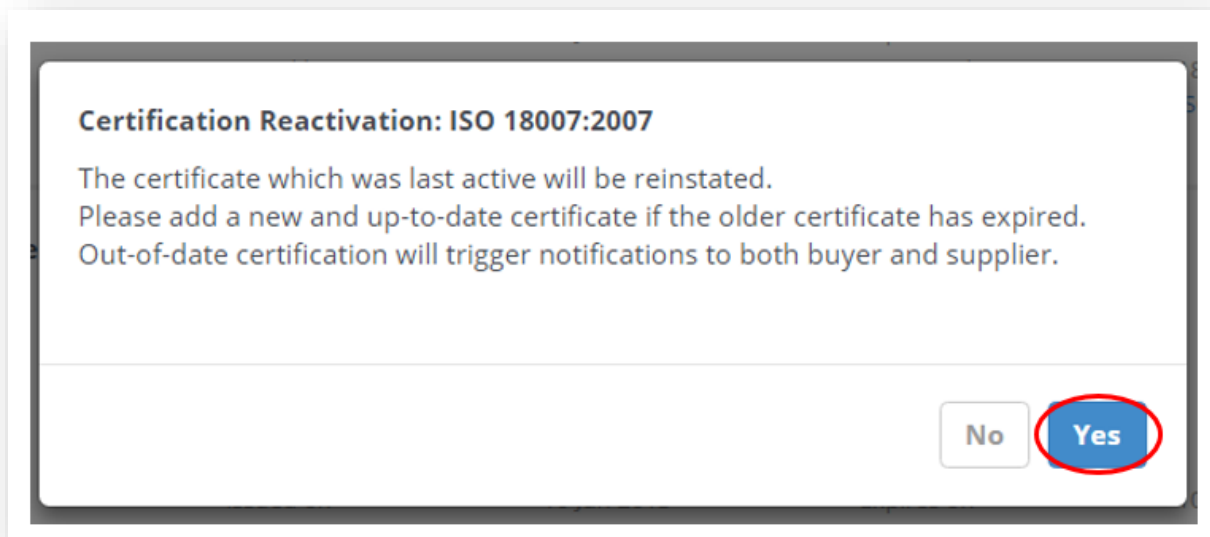
Upon Reactivation, you will be able to update the Certification and use the options available within the edit mode when clicking on 'Update Certification'

Create New Certificate

To create a new Certification, click on the green 'Add new Certification' button.

A pop-up window will appear with a form to fill in the Certification details and attach a Certificate document.

By default, new the Certification is marked to be visible on your Public Profile. If you do not wish so, simply, untick the box.

Upon filling in the Certification details, make sure to click 'Save' button to be able to see the new Certification listed in 'Certifications' section.

Now you should see newly created Certification listed among all existing Certifications within the 'Certifications' section.

IMPORTANT NOTE: Creating new Certification will not update your expired Certification. To Update expired certification please refer to Update Certification guide