

How do I create a new certificate?

1. Click on **New**.
2. Select the **Certificate type**.

The screenshot shows a 'Certificate details' window with three tabs: 'General', 'Documents', and 'Forms'. The 'General' tab is active. Under 'Certificate type', there are three options: 'Annual' (checked), 'Intermediate', and 'None'. Each option has a 'Months' dropdown, a 'before' field with a spinner, an 'after' field with a spinner, and a 'before renewal' field with a dropdown. Below this, there are fields for 'Certificate number', 'Certificate name', 'Renewal after' (with a spinner and a 'Years' dropdown), 'Category' (dropdown), 'Issued by' (dropdown), and 'Date of issue' (calendar icon). At the bottom, there are 'Storage' and 'Comments' text areas. At the very bottom, there are three buttons: 'Save', 'Save & close', and 'Close'.

- **Annual:** A survey will be planned annually for this certificate.
 - **Intermediate:** A survey will be planned for some time between the date of issue and the date of expiry.
 - **None:** Use this type when no intermediate surveys are required.
3. Complete all required fields.
 4. Click on **Save & close**.

If a certificate is entered with an issue date but without an expiry date, enter a 0 in **Renewal after**. This will remove the expiry date from the screen.

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