

(C) AVANTI GROUP LTD

SELECTCERTS

Windows, Mac & Linux Manual

Josh

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SELECTCERTS Desktop Version

The PC, Mac & Linux applications allow certificates to be competed electronically without always needing an internet connection and is ideal for the office on a desktop machine or on site with a Windows 8 tablet or a laptop.

Although this guide is specific to the desktop version, most of the documentation may be applied to the website, the Android and iOS apps.

Download and Installation

The Desktop application can be installed in any directory/folder that has full/read write permissions. It can be installed on removable storage such as flash drives, as long as the operating system is the same as the target installation (e.g. a windows install to a flash drive can only be used on other windows machines). Please don't install into "C:/Program Files" on windows due to permission limitations.

System requirements (PC)

Requirement type	Minimum requirement
RAM	128MB*
Storage space	64MB*
Processor speed	1.5GHz
Screen resolution	800x600

* Available space

System requirements (Mac & Linux)

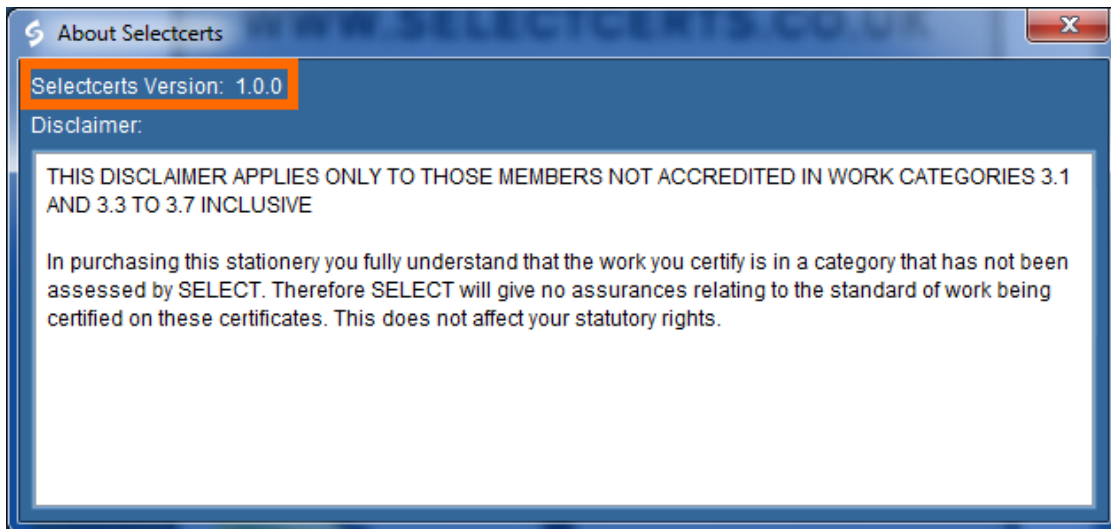
Requirement type	Minimum requirement
RAM	128MB*
Storage space	64MB*
Processor speed	1.5GHz
Screen resolution	800x600
Java	Version 1.7.0_51

* Available space

Run the setup application once it has been downloaded.

Knowing the program version

If you need to know whether your version of SELECTCERTS is up to date, it is helpful to check the version code. To check the version code click on the about link at the bottom of the main window.



Registration & Activation

If you have not registered with SELECTCERTS, click the **Register** button to register.



Once you are on the registration screen, enter your details in the fields on the left hand side, information on what is required in each field is shown on the right, then click the **Register** button. To ensure the best technical service and user experience, please ensure the company information is as accurate as possible.

Registration Details		Password
Company Name:	<input type="text"/>	Please enter a password of 6-20 alphanumeric characters This is a required field.
Address Line 1:	<input type="text"/>	
Address Line 2:	<input type="text"/>	
City:	<input type="text"/>	
County:	<input type="text"/>	
Post Code:	<input type="text"/>	
Telephone:	<input type="text"/>	
SELECT Membership No:	<input type="text"/>	
User Name:	<input type="text"/>	
Email:	<input type="text"/>	
Password:	<input type="password"/>	
<div>Back Register</div>		

If the registration was successful you will be notified, and an activation email sent to the address entered in the Email field. The email will look similar to the one shown below, click the link to activate your account.

Hi Example Company,

Please click the following link to complete your activation:

<http://www.selectcerts.co.uk/activation.php?id=5139bd8156251>

Kind Regards,

The selectcerts.co.uk Team.

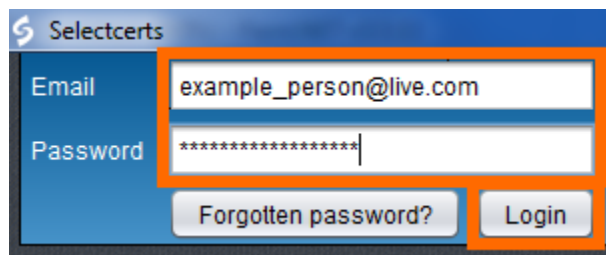
Setting up the program for first use

Before the program may be used it must first be set up. To set up the program simply log in (please make sure you have a good internet connection for this stage while it retrieves information from selectcerts.co.uk).

Please note SELECTCERTS Desktop can be used by multiple users however each user must be registered to use the system. To register a user open the **Account** section and select **Users** then click **Add**. Insert details of the intended user. Note: There are three user levels; Site User, Validator and System Administrator each of whom can have one or many specific permissions allocated to them at the discretion of the system purchaser - see the account section on page 27.

Logging in

To log in, enter your email and password, then click **Login**. The synchronisation process will begin, if you are connected to the internet.



Selectcerts

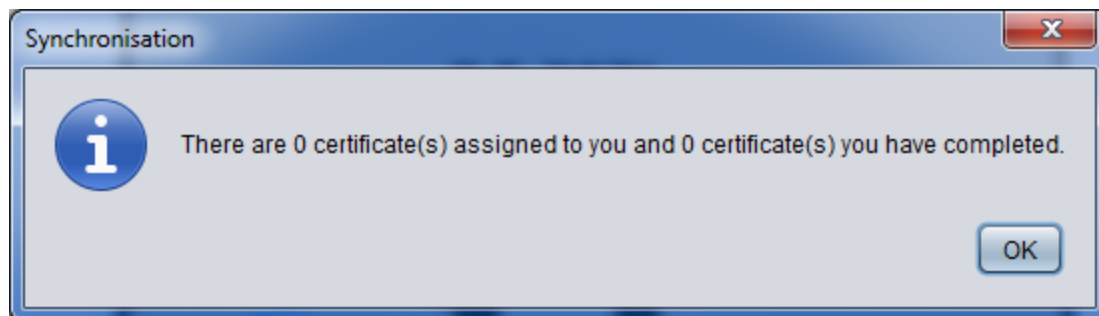
Email example_person@live.com

Password *****

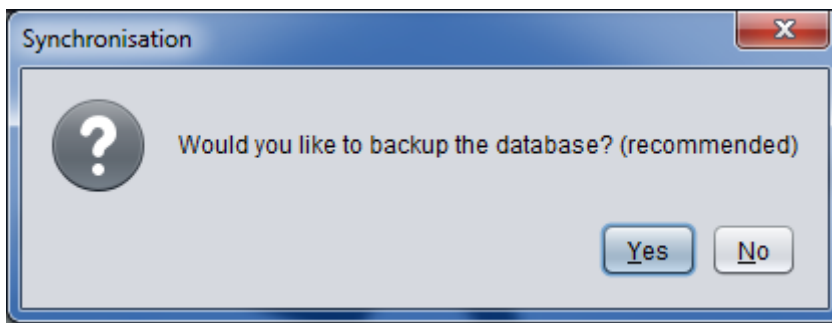
Forgotten password? Login

Synchronising

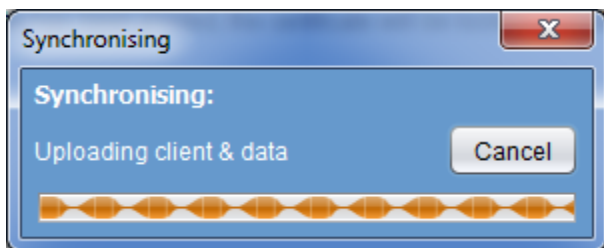
Once you log in SELECTCERTS will tell you how much synchronising it is going to do (in addition to some basic synchronisation e.g. clients/locations).



You may back up your locally stored information if you wish to.



After you have made a choice synchronisation will then begin.



How do I download a certificate?

To download a certificate it must be assigned to your username. please see the "Certificates" section.

How do I upload a certificate?

To upload a certificate that has been downloaded, or created offline, you need to mark it as complete. please see the "Certificates" section.

Navigating through the application

Shown below is the menu. You will only see **Home** and **Clients** first.



As you progress in the application you will see more tabs, click a tab to go back to that stage.

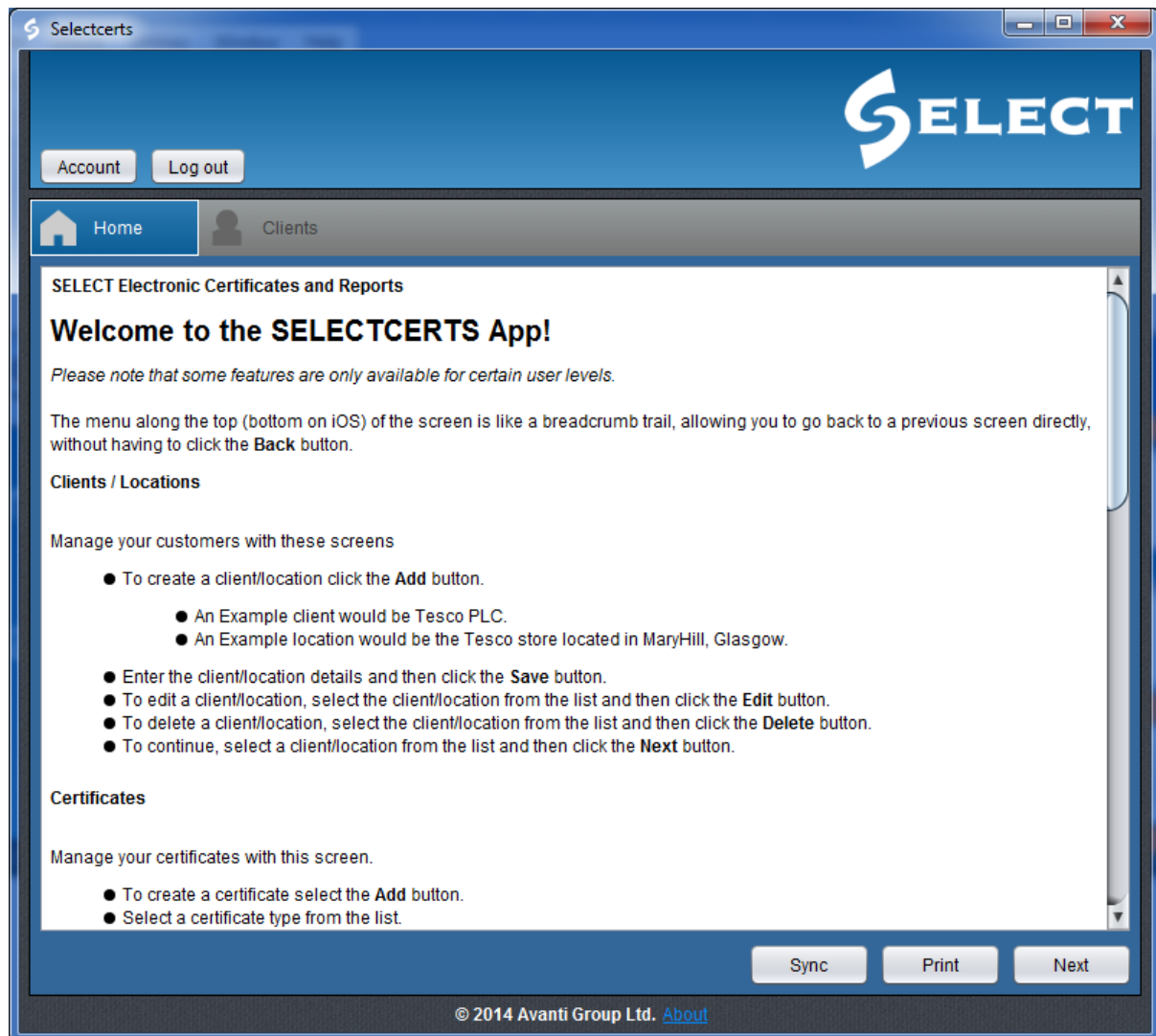


The homepage

This is the screen you will see when you log in. It contains a Quick start guide which you may print by clicking on the **Print** button.

You may also perform synchronisations here if you wish.

Clicking **Next** takes you to the Clients screen.



Clients

You can manage your clients here.

Please note: Actual site locations should be recorded in the Locations screen. A client is the person ordering the work from you and could be either a home owner, architect, builder or another type or organisation (the client address may also be the location address in some instances - see the Copy Client function in adding a location on page 15).

To manage locations for a client, click on the client in the list in the left hand side and then click **Next**.

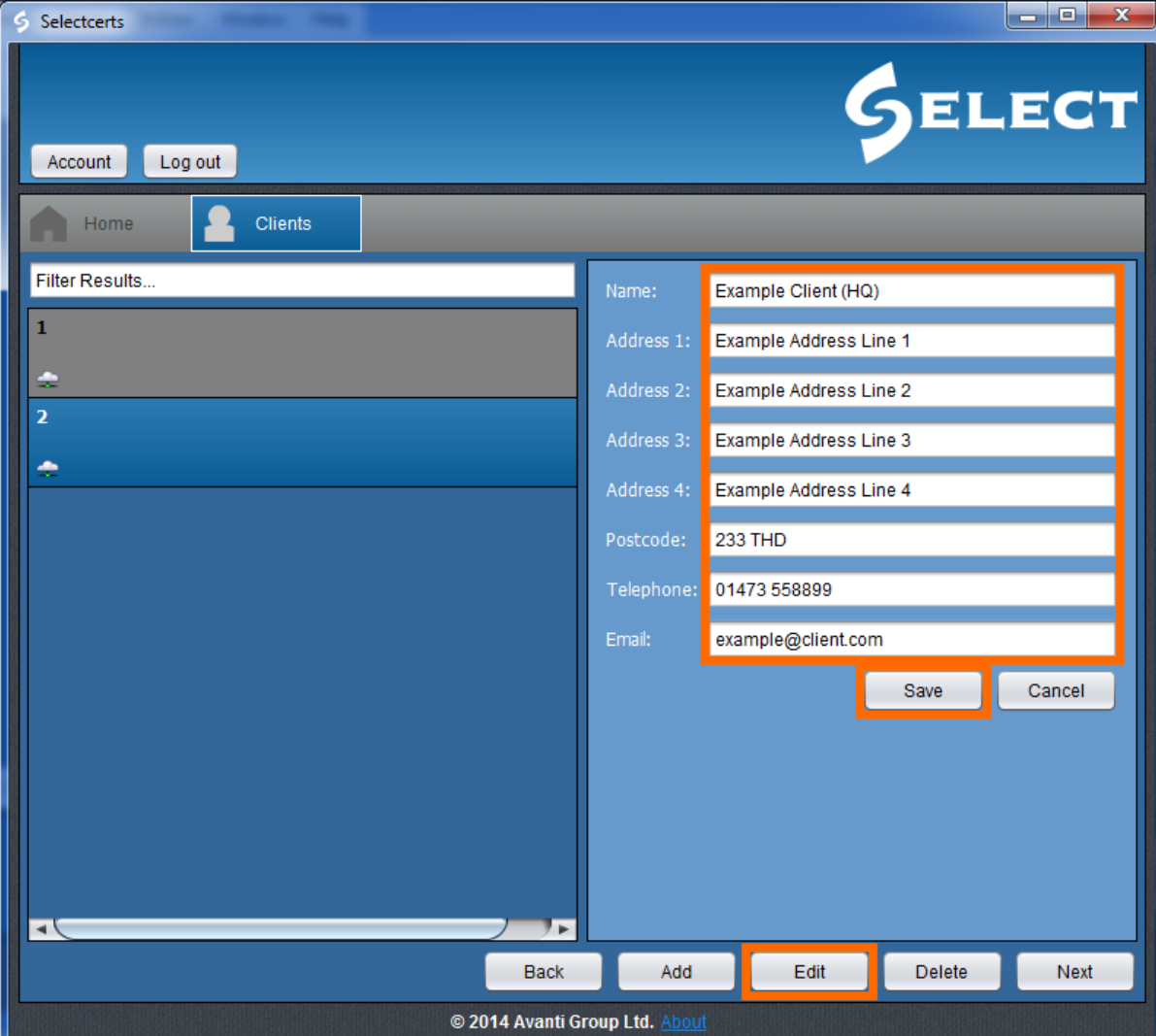
Clients that are stored online are indicated by a cloud icon.

Click **Back** to go back to the home screen.

The screenshot displays the Selectcerts web application interface. At the top, the 'Selectcerts' logo is on the left, and the 'SELECT' logo is on the right. Below the logo, there are 'Account' and 'Log out' buttons. A navigation bar shows 'Home' and 'Clients' tabs, with 'Clients' being the active tab. A 'Filter Results...' search bar is positioned above a list of clients. The list contains two entries: '1' and '2', each with a cloud icon indicating online storage. To the right of the list is a detailed form for client '1'. The form fields are: Name (1), Address 1, Address 2, Address 3, Address 4, Postcode, Telephone, and Email (josh.sahota@avantigroup.uk.com). At the bottom of the interface, there are 'Back', 'Add', 'Edit', 'Delete', and 'Next' buttons. The footer text reads '© 2014 Avanti Group Ltd. [About](#)'.

Adding a Client

To add a client, click the **Add** button. The details section on the right hand side will become editable, enter the clients details in this area then click **Save** (or cancel). Filling these details as accurately as possible will help you when creating certificates.



The screenshot shows the Selectcerts web application interface. The top navigation bar includes 'Account' and 'Log out' buttons. The main navigation bar has 'Home' and 'Clients' tabs, with 'Clients' being the active tab. A 'Filter Results...' search bar is located above a list of client entries. The list shows two entries, '1' and '2', each with a small icon. The details for the selected client (entry 2) are displayed on the right side of the page. The details form includes fields for Name, Address 1, Address 2, Address 3, Address 4, Postcode, Telephone, and Email. The 'Edit' button at the bottom of the details section is highlighted with an orange border. The 'Save' and 'Cancel' buttons are also visible. The footer of the application shows the copyright notice '© 2014 Avanti Group Ltd. About'.

Client ID	Name	Address 1	Address 2	Address 3	Address 4	Postcode	Telephone	Email
1								
2	Example Client (HQ)	Example Address Line 1	Example Address Line 2	Example Address Line 3	Example Address Line 4	233 THD	01473 558899	example@client.com

Buttons: Back, Add, Edit, Delete, Next

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Editing a client

To edit a client, click on the client you want to amend in the left hand side and then click **Edit**, the details on the right hand side will become editable. Edit as required and then click **Save**.

The screenshot shows the Selectcerts web application interface. At the top, there's a header with the 'SELECT' logo and navigation links for 'Account' and 'Log out'. Below this is a sidebar with 'Home' and 'Clients' tabs. The 'Clients' tab is active, showing a list of clients. Client '1' is selected. To the right of the list is a form for editing client details. The form fields are: Name (1), Address 1 (Address 1), Address 2 (Address 2), Address 3, Address 4, Postcode, Telephone (07771121189), and Email (josh.sahota@avantigroup.uk.com). The 'Save' and 'Cancel' buttons are at the bottom of the form. At the bottom of the page, there are buttons for 'Back', 'Add', 'Edit', 'Delete', and 'Next'. The 'Edit' button is highlighted. The footer contains the copyright notice '© 2014 Avanti Group Ltd. About'.

Selectcerts

Account Log out

Home Clients

Filter Results...

1

2

Name: 1

Address 1: Address 1

Address 2: Address 2

Address 3:

Address 4:

Postcode:

Telephone: 07771121189

Email: josh.sahota@avantigroup.uk.com

Save Cancel

Back Add Edit Delete Next

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Deleting a Client

To delete a client, select the client on the left hand side and click **Delete**, then click **Yes** to confirm the deletion.

The screenshot displays the Selectcerts web application. At the top, there's a navigation bar with 'Account' and 'Log out' buttons. Below this is a secondary navigation bar with 'Home' and 'Clients' tabs. The 'Clients' tab is active, showing a list of two clients. Client 2 is selected, and its details are shown on the right. The details include Name, Address 1-4, Postcode, Telephone, and Email. The 'Delete' button is highlighted with an orange border.

Filter Results...

1

2

Name: 2

Address 1:

Address 2:

Address 3:

Address 4:

Postcode:

Telephone:

Email:

Back Add Edit Delete Next

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Locations

You can manage site locations on the Locations screen.

To go back to the Clients screen click **Back**.

To go to the Certificates screen choose a location then click **Next**. Locations that are saved online are indicated by a cloud icon.

The screenshot shows the Selectcerts web application interface. At the top, there is a blue header with the 'SELECT' logo on the right and 'Account' and 'Log out' buttons on the left. Below the header is a navigation bar with 'Home', 'Clients', and 'Locations' tabs. The 'Locations' tab is active. On the left side of the main content area, there is a 'Filter Results...' search bar and a list of results. The first result is numbered '1' and has a small cloud icon next to it. To the right of the list is a form with fields for 'Name:', 'Address 1:', 'Address 2:', 'Address 3:', 'Address 4:', 'Postcode:', 'Telephone:', and 'Email:'. At the bottom of the page, there are buttons for 'Back', 'Add', 'Edit', 'Delete', and 'Next'. The footer contains the copyright notice '© 2014 Avanti Group Ltd.' and a link to 'About'.

Selectcerts

Account Log out

Home Clients Locations

Filter Results...

1

Name: Address 1: Address 2: Address 3: Address 4: Postcode: Telephone: Email:

Back Add Edit Delete Next

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Adding a location

To add a new location, click **Add** and fill in the location details on the right hand side, then click **Save**.

Clicking **Copy Client** allows you to copy the details from the selected client into the location details.

The screenshot shows the 'Selectcerts' web application interface. At the top, there's a blue header with the 'SELECT' logo and navigation links for 'Account' and 'Log out'. Below this is a grey navigation bar with icons and labels for 'Home', 'Clients', and 'Locations'. The 'Locations' tab is active. On the left, there's a 'Filter Results...' search bar and a list of results, currently showing one item with a small icon. The main area on the right is a form for adding or editing a location. It contains several text input fields: 'Name' (filled with 'Example Location'), 'Address 1' (filled with 'Example Address 1'), 'Address 2' (filled with 'Example Address 2'), 'Address 3' (filled with 'Example Address 3'), 'Address 4' (filled with 'Example Address 4'), 'Postcode' (filled with 'E9W 7TS'), 'Telephone' (filled with '09883 6496 764'), and 'Email' (filled with 'exampleLocation@client.com'). Below these fields are three buttons: 'Copy Client', 'Save' (highlighted with an orange border), and 'Cancel'. At the bottom of the form area, there's a row of buttons: 'Back', 'Add' (highlighted with an orange border), 'Edit', 'Delete', and 'Next'. The footer of the application shows the copyright notice '© 2014 Avanti Group Ltd. [About](#)'.

Editing a Location

To edit a location, select the location from the left hand side and click **Edit**, Change the details as required then click **Save**.

The screenshot shows the Selectcerts web application interface. At the top, there's a blue header with the 'SELECT' logo and 'Account' and 'Log out' buttons. Below this is a navigation bar with 'Home', 'Clients', and 'Locations' tabs. The 'Locations' tab is active. On the left, there's a list of locations with a 'Filter Results...' search bar. One location is listed with the number '1'. On the right, the 'Edit' form for this location is displayed. The form fields are: Name (1), Address 1 (Edited Address), Address 2, Address 3, Address 4, Postcode, Telephone, and Email. The 'Save' button is highlighted with an orange box. At the bottom of the form, there are 'Copy Client', 'Save', and 'Cancel' buttons. At the bottom of the page, there are 'Back', 'Add', 'Edit', 'Delete', and 'Next' buttons. The 'Edit' button is highlighted with an orange box. The footer contains the copyright notice '© 2014 Avanti Group Ltd. About'.

Selectcerts

Account Log out

Home Clients Locations

Filter Results...

1

Name: 1

Address 1: Edited Address

Address 2:

Address 3:

Address 4:

Postcode:

Telephone:

Email:

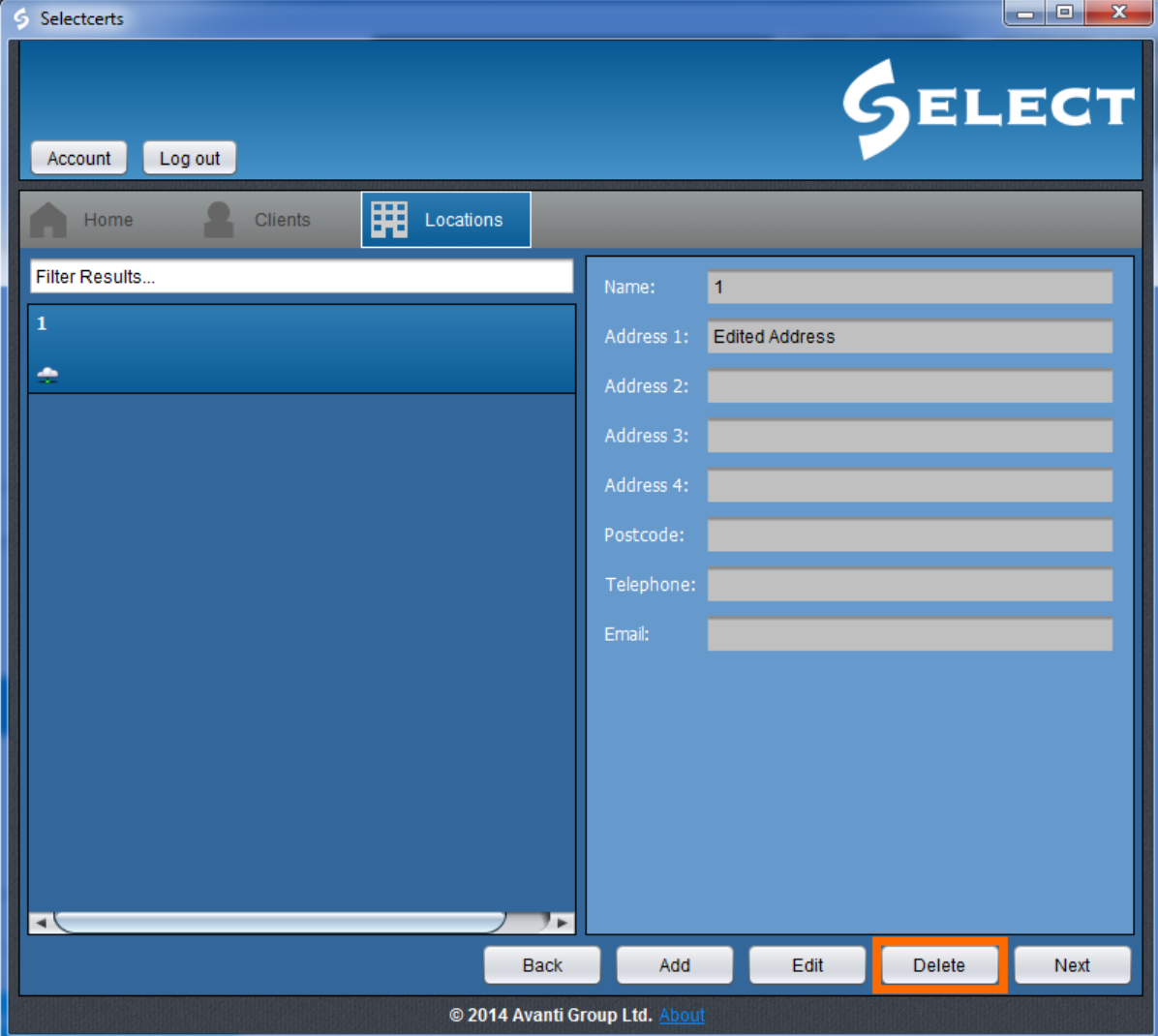
Copy Client Save Cancel

Back Add Edit Delete Next

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Deleting a location

Select a location on the left hand side and click **Delete** to delete it.



Selectcerts

Account Log out

Home Clients Locations

Filter Results...

1

Name: 1

Address 1: Edited Address

Address 2:

Address 3:

Address 4:

Postcode:

Telephone:

Email:

Back Add Edit Delete Next

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Certificates

You can manage certificates on this screen.

The list of certificates are on the left. Certificates that are stored online will have a cloud icon, certificates that are stored locally on the PC will lack the cloud icon.

Click **Back** to go back to the locations screen.

To edit the pages of a certificate select a certificate on the left hand side and click **Next**.

The screenshot displays the Selectcerts web application interface. The top navigation bar includes 'Account' and 'Log out' buttons, and the 'SELECT' logo. Below this is a secondary navigation bar with 'Home', 'Clients', 'Locations', and 'Certificates' tabs. The 'Certificates' tab is active, showing a list of certificates on the left and a details panel on the right.

Filter Results...

Certificate Title	Reference Number	Storage Type
17th A1 Electrical Installation 15 Circuits	150011	Local (Green checkmark)
17th A1 Small Installation	000008	Online (Cloud icon)
17th A1 Electrical Installation 36 Circuits	360005	Online (Cloud icon)
17th A1 Condition Report 15 Circuits	150008	Online (Cloud icon)
Fire Detection and Fire Alarm Inst	000004	Online (Cloud icon)
Fire Alarm Servicing	000005	Online (Cloud icon)
17th A1 Small Installation	000009	Online (Cloud icon)

Details Panel:

- Certificate Printed/On Device: No
- Certificate Completed: No
- Notes: (Empty text area)
- Assign Certificate to user: (none)
- Email Certificate button

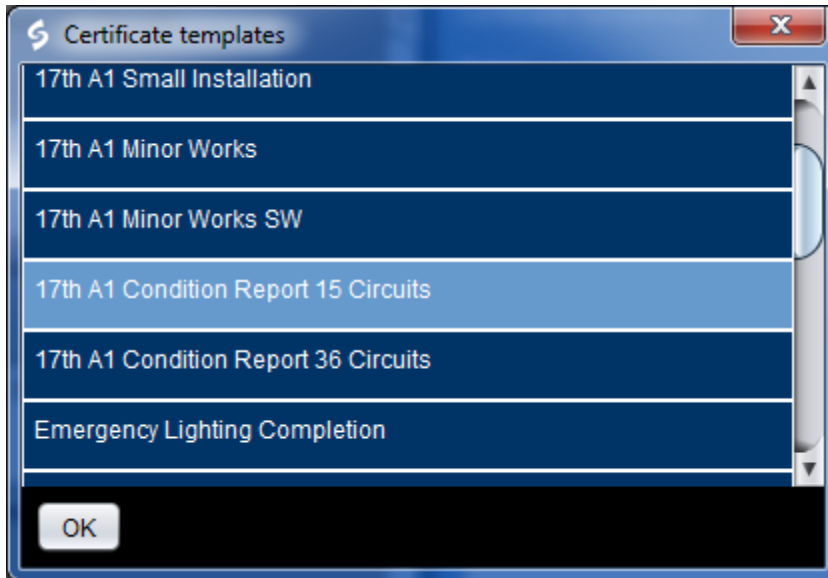
Bottom Navigation: Back, Add, Preview, Print, Delete, Next

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Adding a new certificate

To add a new certificate click the Add button. Then, select a template and click **OK**. The new certificate will then appear in the certificate list on the left hand side.

Please note: Users must have permission "certificate_add" set to true to be able to add certificates, for more details please see the permissions section.



Printing/previewing a certificate

To print or preview a certificate select the certificate on the left hand side and click **Print/Preview**.

Please note: Only certificates that are stored can be printed or previewed, to print or preview a certificate stored on a PC it must first be uploaded. Users with permission "certificate_print" can use this functionality.

The certificate will open in your preferred PDF viewer, from here you can save the PDF for an email attachment or you can print it on paper.

The screenshot shows a PDF viewer window titled "5371fd264013b.pdf - Nitro Reader 3". The form is titled "ELECTRICAL INSTALLATION CERTIFICATE (REQUIREMENTS FOR ELECTRICAL INSTALLATIONS - BS 7671 (JET WIRING REGULATIONS))". It includes a logo for "SELECT" and a membership number "EI 360005". The form is divided into sections: "DETAILS OF THE CLIENT", "INSTALLATION ADDRESS", "DESCRIPTION AND EXTENT OF THE INSTALLATION", and "FOR DESIGN". The "DESCRIPTION AND EXTENT OF THE INSTALLATION" section includes a table with checkboxes for "New installation", "Addition to an existing installation", and "Alteration to an existing installation". The "FOR DESIGN" section includes a statement of responsibility and a date "01/07/2011".

ELECTRICAL INSTALLATION CERTIFICATE (REQUIREMENTS FOR ELECTRICAL INSTALLATIONS - BS 7671 (JET WIRING REGULATIONS))	
SELECT MEMBERSHIP NUMBER 123456789	EI 360005 Copyright The Electrical Contractors' Association of Scotland The Electrical Contractors' Association This certificate is not valid if the number is defaced or altered
DETAILS OF THE CLIENT Name: 1 Address:	
INSTALLATION ADDRESS Occupier: 1 Address:	
DESCRIPTION AND EXTENT OF THE INSTALLATION Description of installation: Extent of installation covered by this certificate: ghgygyghghgygh (Use continuation sheet if necessary) see continuation sheet No:	
Tick boxes as appropriate New installation <input checked="" type="checkbox"/> Addition to an existing installation <input checked="" type="checkbox"/> Alteration to an existing installation <input checked="" type="checkbox"/>	
FOR DESIGN I/We being the person(s) responsible for the design of the electrical installation (as indicated by my/our signatures below), particulars of which are described above, having exercised reasonable skill and care when carrying out the design hereby CERTIFY that the design work for which I/we have been responsible is to the best of my/our knowledge and belief in accordance with BS 7671:2008, amended to 01/07/2011	

Editing a certificates details

Once you click a certificate in the list, details will populate on the right hand side.

Note: This is where certificates can be setup for **offline use** if needed.

If you have completed a certificate, you can notify your boss or colleagues by selecting Yes from the drop down box, this will put a tick in the certificate list. Marking a certificate as complete allows it to be uploaded to the online system when you next synchronise, if the certificate does not have a cloud icon.

Notes can be added in the notes box. This is a useful feature where the user can record comments or remarks on any aspect of the electrical installation relating to the certificate.

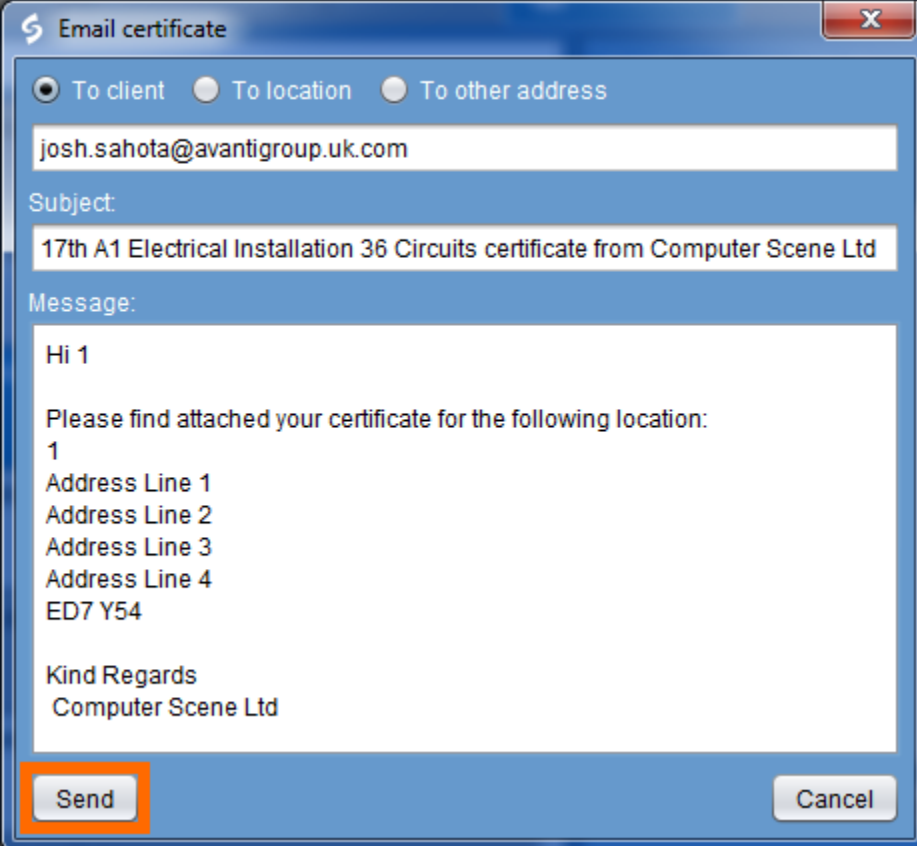
To put a certificate onto a users device it must first be assigned to the user by using the drop down box named "Assign certificate to user". The certificate will then be downloaded onto the users device when they next synchronise.

Emailing a certificate

Once a certificate has been completed it can then be emailed. Click **Email Certificate** to open the email dialog.

First confirm the email address is correct, you can choose from the client email, the location email or another email address by clicking on the radio buttons.

Amend the Subject and message body if needed then click **Send**.



Email certificate

☒ To client ☐ To location ☐ To other address

josh.sahota@avantigroup.uk.com

Subject:

17th A1 Electrical Installation 36 Circuits certificate from Computer Scene Ltd

Message:

Hi 1

Please find attached your certificate for the following location:

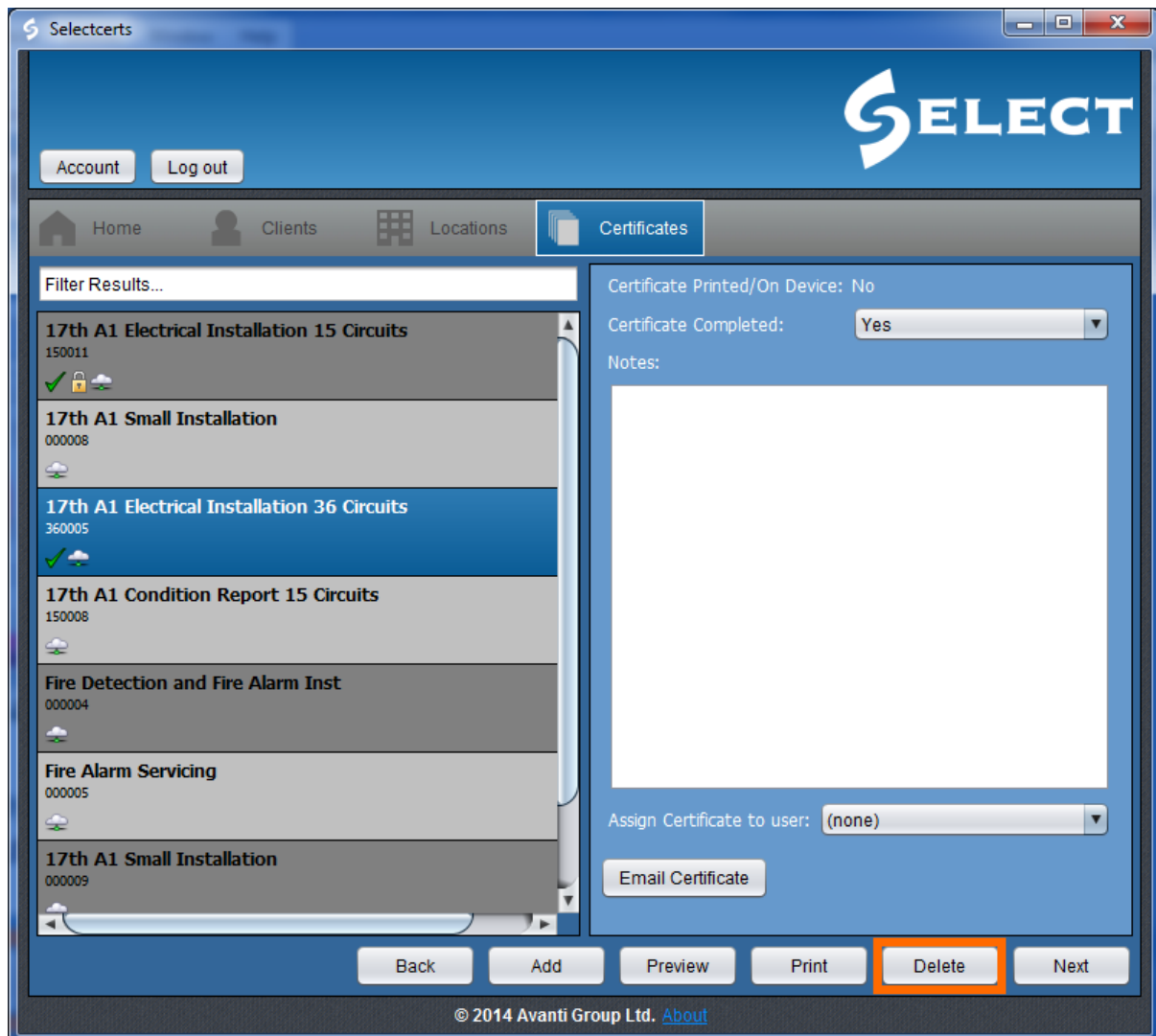
1
Address Line 1
Address Line 2
Address Line 3
Address Line 4
ED7 Y54

Kind Regards
Computer Scene Ltd

Send Cancel

Deleting a certificate

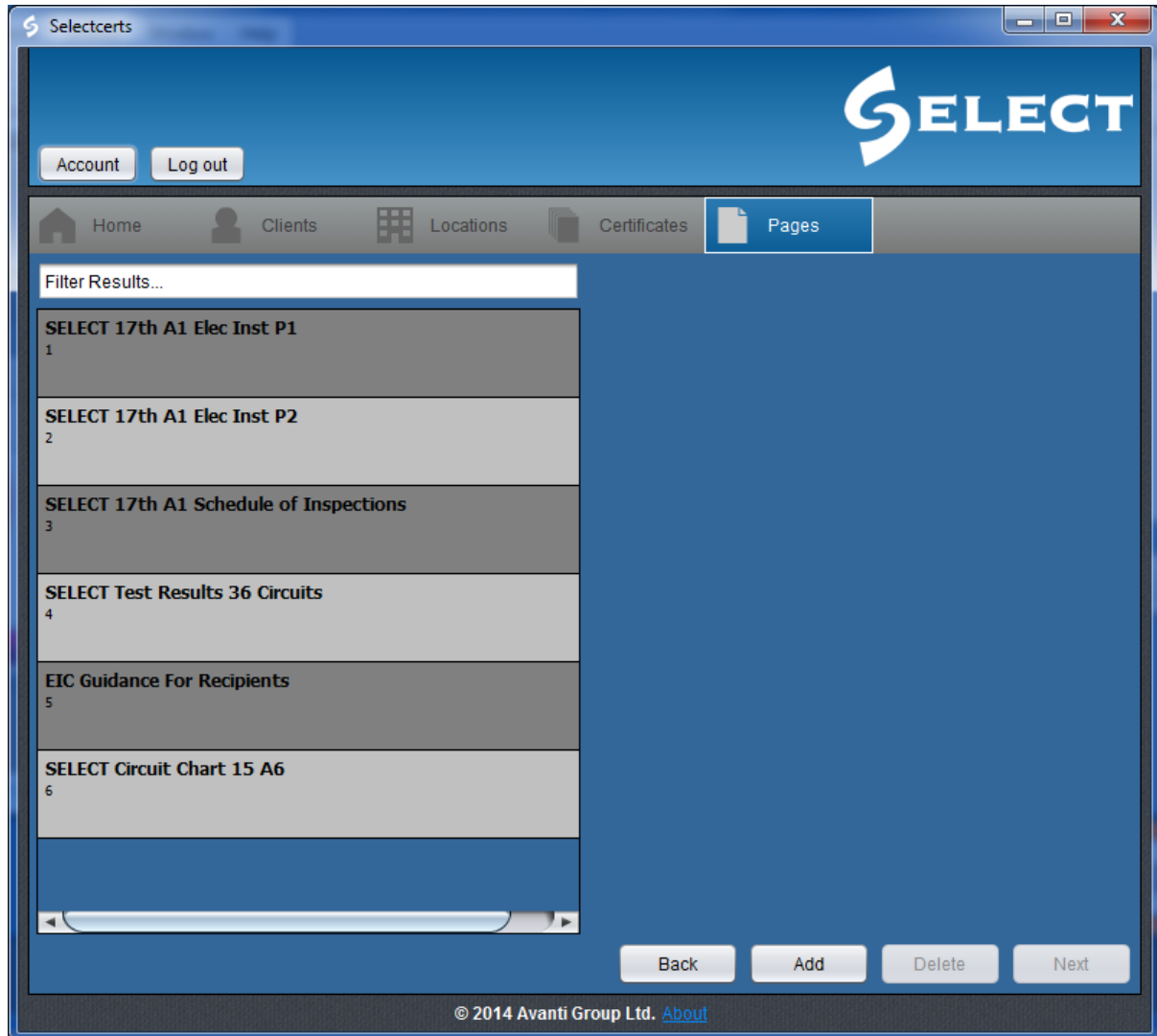
To delete a certificate, select it from the list by clicking on it and then click **Delete**.



Pages

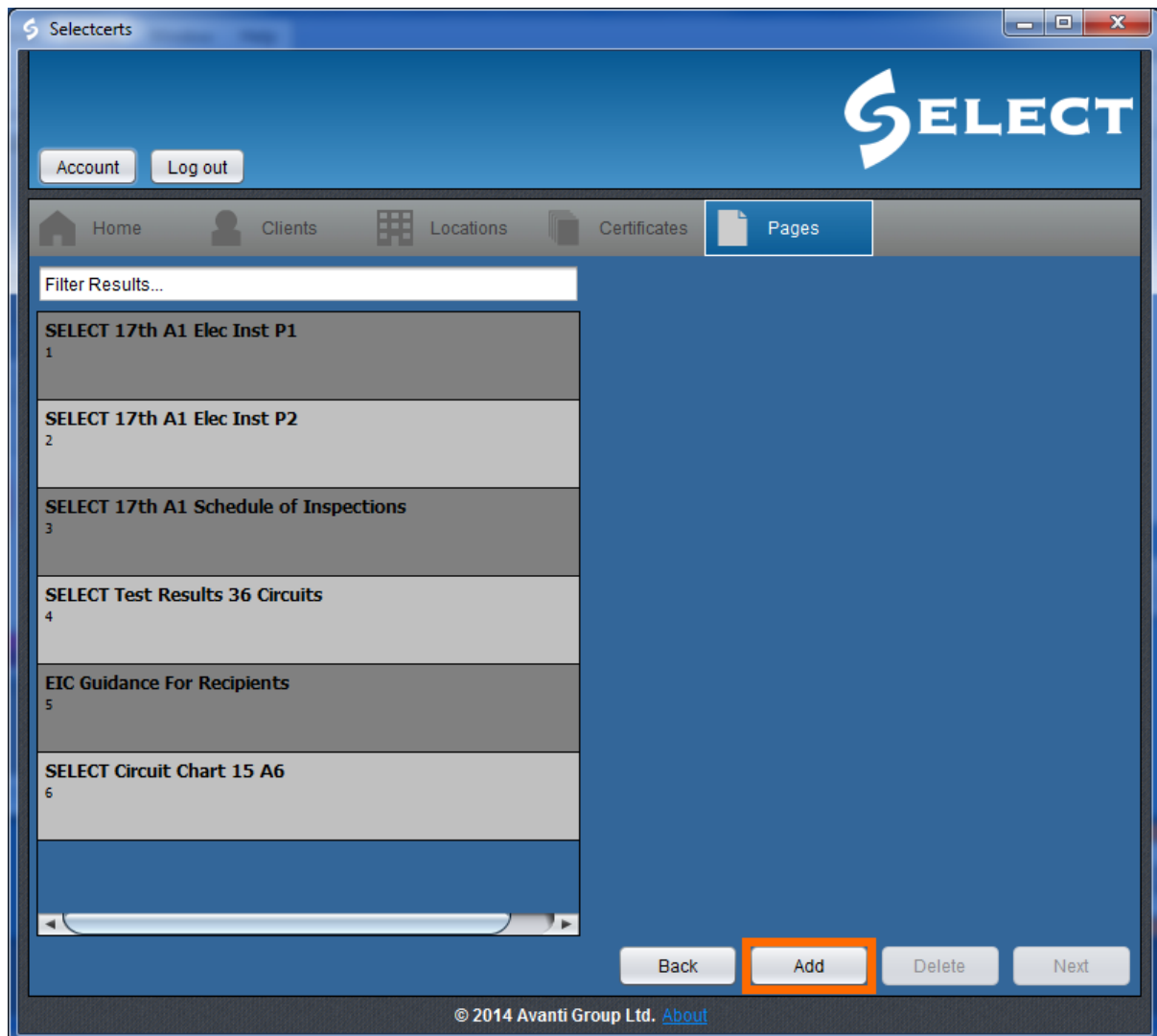
Once you have chosen a certificate and advanced to the pages screen, you can manage all the pages that form the certificate.

To edit a page, choose the page you wish to edit and click **Next**.



Adding a new page

To add a new page, click the **Add** button.



Then select a page template and click **OK**. The new page will be created and appear in the pages list. When issuing a certificate or report the relevant guidance for recipients page must be attached.

Certificate page templates

- SELECT Test Results 15 Circuits
- SELECT Test Results 36 Circuits
- EIC Cover Reverse Notes
- EIC Guidance For Recipients
- SELECT Circuit Chart 15 A6
- SELECT Circuit Chart 36 A5

OK

Sections

This is where you or the site user will edit the certificate. You can enter information in the cream coloured boxes and white boxes. Check boxes can be ticked.

Selectcerts

Account **Log out**

Home **Clients** **Locations** **Certificates** **Pages** **Sections**

SELECT

MINOR ELECTRICAL INSTALLATION WORKS CERTIFICATE
(REQUIREMENTS FOR ELECTRICAL INSTALLATIONS - BS 7671 [IET WIRING REGULATIONS])

SELECT MEMBERSHIP NUMBER: 123456789

To be used only for minor electrical work which does not include the provision of a new circuit

Copyright The Electrical Contractors' Association of Scotland
The Electrical Contractors' Association
This certificate is not valid if the number is defaced or altered

MW 000016

PART 1: DESCRIPTION OF MINOR WORKS

- Description of the minor works
- Location/Address
- Date minor works completed
- Details of departures, if any, from BS 7671:2008

PART 2: INSTALLATION DETAILS Tick boxes and enter details as appropriate

- System earthing arrangement (where known)
 - TN-C-S ☐ TN-S ☐ TT ☐
- Method of fault protection
 - Automatic disconnection of supply ☐ Other ☐
- Protective device for the modified circuit
 - Type Rating A
 - DB Ref. No. Circuit No.

Comments on existing installation, including adequacy of earthing and bonding arrangements (see Regulation 132.16):

Copy **Paste** **Back** **Fill Down**

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Adding a signature

To add a signature click on a signature box.

Live/earth MΩ
Earth fault loop impedance (Zs) Ω
Polarity satisfactory ☐
RCD/RCBO operation (if applicable). Rated residual operating current $I_{\Delta n}$ mA and operating time of ms (at $I_{\Delta n}$)

PART 4: DECLARATION
I/WE CERTIFY that the said works do not impair the safety of the existing installation, that the said works have been designed, constructed, inspected and tested in accordance with BS 7671:2008 (IET Wiring Regulations), amended to and that the said works, to the best of my/our knowledge and belief, at the time of my/our inspection, complied with BS 7671 except as detailed in Part 1 above.

Name
For and on behalf of Computer Scene Ltd
Address 5 King street
 Mildenhall Bury St Edmunds
 Suffolk IP28 7ES

Signature
Position
Date / /

Then choose a signature file, it must be smaller than 100KB and of png/bmp/jpg format.

Please note: you may need to synchronise to upload signatures.

Column fill

To fill an entire column enter the detail in the upper most column and click **Fill Down**.

Selectcerts

Account Log out

Home Clients Locations Certificates Pages Sections

Distribution Board Reference No. vulnerable to damage when testing ☐ Supply polarity
Location and Type Phase sequence confirmed (where appropriate) ☐

CIRCUIT DETAILS										TEST RESULTS									
No.	Circuit Description	No. of Points	Wiring Details				Overcurrent Device		Continuity				Insulation Resistance		Polarity	Earth fault loop impedance	RCD		
			Type (see code below)	Ref. Method	c/sa		Type	Amps	R1+R2 or R2		Final Ring Circuit		Resistance (Lowest values measured)						
					mm ²	Live			CPC	Ω	Ω	Ω	Ω	Ω				Ω	
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		
	Ring Main																		

+ Insert Reference Method (see Table 4A2 from BS 7671 Appendix 4)

Copy Paste Back **Fill Down**

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Copy/Paste

Charts may be copied from one page to another of the same type. **Copy** and **Paste** allows you to easily transfer information from one chart to another.

The screenshot shows the Selectcerts software interface. At the top, there's a blue header with the 'SELECT' logo and buttons for 'Account' and 'Log out'. Below this is a navigation bar with icons for Home, Clients, Locations, Certificates, Pages, and Sections. The main area contains a form for 'Distribution Board Reference No.' and 'Location and Type'. A table titled 'CIRCUIT DETAILS' is visible, with columns for No., Circuit Description, No. of Points, Wiring Details (Type, Ref. Method, csa, mm², Live, CPC), Overcurrent Device Breaking Capacity (Type, Amps, kA), Continuity (R1+R2 or R2, R1+R2, L-L, N-N, CPC-CPC), Insulation Resistance (Lowest values measured), Polarity, Earth fault loop impedance (Zs), and RCD Protection. The table has 15 rows, all labeled 'Ring Main'. Below the table, there's a note: '+ Insert Reference Method (see Table 4A2 from BS 7671 Appendix 4)'. At the bottom, there are buttons for 'Copy', 'Paste', 'Back', and 'Fill Down'. The 'Copy' and 'Paste' buttons are highlighted with an orange border.

CIRCUIT DETAILS										TEST RESULTS									
No.	Circuit Description	No. of Points	Wiring Details					Overcurrent Device Breaking Capacity (kA)	Continuity					Insulation Resistance (Lowest values measured)		Polarity	Earth fault loop impedance (Zs)	RCD Protection	
			Type	Ref. Method	csa	mm²			R1+R2 or R2	R1+R2	L-L	N-N	CPC-CPC	L-L	L-E				
	Ring Main	1																	
	Ring Main	1																	
	Ring Main	1																	
	Ring Main	1																	
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	Ring Main	1																	

+ Insert Reference Method (see Table 4A2 from BS 7671 Appendix 4)

Copy Paste Back Fill Down

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The account section

To open the account, click the **Account** button at the top.

The screenshot shows the top part of the Selectcerts software interface. The 'Account' and 'Log out' buttons are highlighted with an orange border. Below them are the 'Home' and 'Clients' buttons.

The Company Tab

On this tab you can enter the company details.

Account

Company Users Billing Devices

Filter Results...

Company Address
Computer Scene Ltd

Billing Address
[Redacted]

Name: Computer Scene Ltd

Address 1: 5 King street

Address 2: Mildenhall

Address 3: Bury St Edmunds

Address 4: Suffolk

Postcode: IP28 7ES

Telephone: 01692 583070

Email: [Redacted]

Member No: 123456789

Edit

Ensure the company address is filled in as accurately as possible as this will help you complete certificates faster by auto-populating certificate information.

Ensure the Billing Address matches the payment details exactly (case sensitive) before purchasing more days.

The Users Tab

For best use of the system, each person who uses SELECTCERTS should be a user. A company can have as many users as they like and there is no additional cost.

The screenshot shows a web application window titled "Account" with a close button (X) in the top right corner. Below the title bar is a navigation bar with four tabs: "Company", "Users" (which is selected and highlighted in blue), "Billing", and "Devices".

Below the navigation bar, the main content area is divided into two sections. On the left is a list of users, preceded by a search box labeled "Filter Results...". The list contains five entries, each with a redacted name and a role: "System Administrator", "System Administrator", "Site User", "System Administrator", and "System Administrator". A vertical scrollbar is visible on the right side of the list.

On the right side of the main content area is a form for adding or editing a user. It includes the following fields:

- Level:** A dropdown menu currently set to "Site User".
- Email:** A text input field.
- Username:** A text input field.
- Password:** A text input field.
- Telephone:** A text input field.

At the bottom of the window, there are four buttons: "Add", "Edit", "Permissions", and "Delete".

To add a user click **Add** and fill in the details, then click **Save**.

There are 3 basic permission levels; System Administrator, Validator and Site User.

System Administrators have full control of the system, Validators can create and assign certificates and Site Users can complete certificates that have been assigned to them.

Account

Company Users Billing Devices

Filter Results...

System Administrator

System Administrator

Site User

System Administrator

System Administrator

System Administrator

Level: Site User

Email:

Username:

Password:

Telephone:

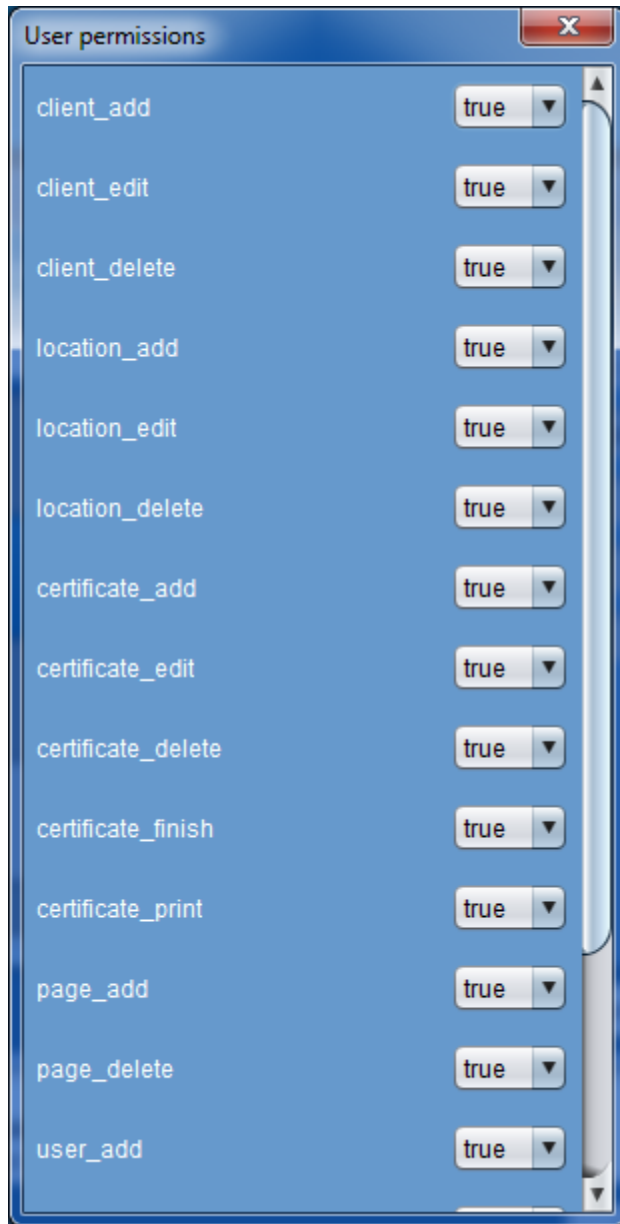
Save Cancel

Add Edit Permissions Delete

To edit a users details click **Edit** and amend the details, then click **Save**.

Permissions

To view or edit specific permissions select a user and click **Permissions**.



Amend the permissions with the adjacent drop downs. These will automatically save once toggled.

The details of each permissions are:

Permission name	Features enabled if true
client_add	Adding clients
client_edit	Adding clients
client_delete	Deleting clients
location_add	Adding locations
location_edit	Editing locations
location_delete	Deleting locations
certificate_add	Adding certificates
certificate_edit	Editing certificates

certificate_delete	Deleting certificates
certificate_finish	Adding signatures, marking certificates as complete
certificate_print	Printing certificates, Previewing certificates
page_add	Adding pages
page_delete	Deleting pages
user_add	Adding users
user_edit	Editing users
user_delete	Deleting users
user_allocate	Assigning certificates to users
system_admin	Accessing the account window

The Billing Tab

You can view the amount of days remaining in your account and when it expires. To purchase more days, please visit selectcerts.co.uk, log and purchase on the websites billing tab. This will redirect you to Sage Pay.

The screenshot shows a web application window titled "Account" with a close button (X) in the top right corner. Below the title bar is a navigation bar with four tabs: "Company", "Users", "Billing" (which is currently selected and highlighted in blue), and "Devices". The main content area has a blue background and displays the following information:

- Account Expires On:** 20/10/2112
- Total Days Remaining:** 35954
- A text instruction: "To purchase more days please click purchase to be directed to selectcerts.co.uk"
- A "Purchase" button located below the instruction.

The Devices Tab

You can view the devices linked to your account. You can remove a device if it has been lost etc. This will free and locked certificates that were downloaded to that device.

You can also view individual certificates downloaded on a device, and unlock them if necessary.

