

Document Title: Full User Guide: CB Automation

Version: 1.5.0

Publisher: CONSULTING UA-RO LIMITED LIABILITY COMPANY

1. INTRODUCTION & LIABILITY

Welcome to CB Automation, the premier enterprise compliance engine for Certification Bodies. This software provides automated document generation, surveillance tracking, and direct API integration with the IAF CertSearch database. **Important Notice:** By installing this self-hosted software, the Client assumes full responsibility for their server environment, data security, and the legal validity of the generated certificates.

2. SYSTEM REQUIREMENTS

Operating System:

Linux (Ubuntu/CentOS recommended) or Windows (XAMPP).

Web Server:

Apache or Nginx.

PHP Version:

8.2 or 8.4.

Database:

MariaDB 10.4+ or MySQL 8.0+.

Required PHP Extensions:

mysqli, curl, gd, zip, mbstring.

Tools:

Composer (for dependency management).

3. DEPLOYMENT & INSTALLATION

Installation procedures are covered in the **Quick Start Guide**. Please refer to that manual for step-by-step deployment instructions

4. FIRST STEPS

After installing the CB Automation App (hereafter referred to as "the App"), you generally fall into one of two scenarios:

A) New Certification Body (CB): You are using the App for the first time with a fresh database. Follow the steps below for initial configuration.

B) Existing CB Migrating Clients: You have an existing client base and want the App to automatically manage surveillance reminders, update existing certificate data, or handle suspensions (e.g., due to non-compliance, unpaid invoices, or changes in legal address).

The App generates a unique QR Code for each certificate, scannable by any internet-connected mobile device. This ensures that any status change (such as a suspension) is immediately visible to anyone verifying the certificate. *Migration:* You can import existing clients manually, or contact our team for assistance with securely importing your legacy database (client names, company data, and issued certificates). Reach out to support@consulting-ua.eu.

4.1. System Configuration

Begin by configuring your company's details under "Theme Settings", following the on-screen instructions. (Note: We recommend uploading an official C.B. stamp if you plan to issue ready-to-use PDF certificates. Leave the digital signature fields blank unless your company already utilizes a QES (Digital Certificate). For QES integration, contact support). Next, navigate to "Email Notification Settings". It is critical to accurately populate the *Certificate Prefix* field. This prefix, issued by your National Accreditation Agency (e.g., N.A.A.U. in Ukraine), will appear on all official documents. Completing these settings is also mandatory if you want the system to dispatch automated surveillance reminders.

4.2. Staff Management

You must populate the system with your current Staff, including Auditors, Technical Experts, Heads of Body, and Administrators. Log in using the Super Admin account created during installation and navigate to "Manage Staff" ([admin/staff.php](#)).

Permissions: Carefully assign roles by checking the appropriate boxes (Admin, Auditor, Head of Body, Technical Expert).

Lead Auditors: Specify if a staff member "Can be appointed as Lead Auditor".

Education & Competence: To automate the generation of internal documents (like CB Decisions or Auditor Competence protocols), it is highly recommended to fill out the educational and professional background fields for each Auditor and Technical Expert.

Admin Dashboard

Database Management

- Manage Applications
- Manage Certificates
- Manage Clients
- Broker Management
- Manage Staff**
- Manage Auditor Colors
- Company Certificate Overview
- Search Clients
- Financial & Legal OSINT

Surveillance Status

Surveillance Status

- 0 Surveillance (Urgent < 5)
- 0 Surveillance (30 Days)
- 0 Audit In Progress
- 332 total active certificates.

Open Surveillance List

System

System Settings

- System Security & Logs
- Email Notification Settings
- Theme Settings
- Database Nomenclature Sync
- Edit CB Details (Future)
- Admin Master Editor
- Reset Application Data... (Disabled)

Manage Staff

[Add New Staff](#) [Back to Dashboard](#)

Existing Staff Members

Full Name	Email Address	Staff Role(s)	Status	Actions
Marius	support@consulting-ua.eu	Admin	Active	Edit

Add New Staff

[Back to Staff List](#)

Staff Details

Username *

Email Address *

Password *

Full Name *

Phone Number

Staff Role(s) *

- Admin
- Auditor
- Head of Body
- Technical Expert

Auditor Profile Details (Optional)

Fill these only if the role is Auditor, Technical Expert, or Head of CB.

Certification Details

e.g., Cert No. ABC123, Valid ...

Education & Other Details

e.g., University, Degree, Expertise...

Can be appointed as Lead Auditor?
Check if qualified to lead audits.

[Add Staff Member](#)

Staff Role(s) *

- Admin
- Auditor
- Head of Body
- Technical Expert

Can be appointed as Lead Auditor?
Check if qualified to lead audits.

Auditor Profile Details (Optional)

Fill these only if the role is Auditor, Technical Expert, or Head of CB.

Certification Details

e.g., Cert No. ABC.123, Valid ...

Education & Other Details

e.g., University, Degree, Expertise...

4.3. Client Management

Navigate to "Manage Clients" and click "Add new client". You can add clients using two methods:

Manual Entry: The classic manual input method.

AI Scanner: The App features a Google Cloud Vision AI integration that extracts data from Ukrainian Company Certificates. (Note: Ensure your System Administrator configures a new Google Cloud API Key in both admin/ajax_scan_document.php and scan_document.php, as the default testing key will be deactivated). AI extractions must be manually verified before saving. The system will generate a temporary random email address if one is missing, which you can update later.

Intermediary/Broker Configuration: In the Client Management screen, the "Role" dropdown allows you to designate an entity as a "Client Name" or an "Intermediary/Broker". Brokers often withhold direct client contact details. By selecting the Broker role, the system's automated surveillance warnings (sent at 30 days, 5 days, 24 hours pre-suspension, and post-suspension) will be routed directly to the Broker rather than the end client.

4.4. Standards & NACE Codes

The App comes pre-loaded with 16 Standards (from ISO 9001 to DSTU ISO 9001) and mapped NACE Codes aligned with the Ukrainian State Classification (ДК 009:2010). Your

system is now staged and ready for client onboarding.

5.0. Processing a New Client

First, ensure your client sends their complete company data so you can accurately populate the database.

5.1. Once the client profile is complete, you can begin issuing the requested Standard Certificate(s). Simply click on "Start Urgent Process" (Urgent Certificate Generation card) and follow the on-screen instructions.

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Phase 1: Select Standards, Language, and Client

Type of Certification *

Initial Certification Recertification

Select Standard(s) for Certification *

ISO 9001:2015 «Quality management systems» × ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT) «Quality management systems – Requirements» × ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT, ISO 9001:2015, IDT) «Quality management systems – Requirements» ×

Select one or more Standards Certificates you are applying for.

Certificate Language *

Українська

Select Existing Client (Automatically Fills Fields)

7 Service (0000001)

Selecting a client pre-fills company details in the next step.

[Continue to Questionnaire](#)

Phase 1.5: Smart Questionnaire

[Cancel and Go to Dashboard](#)

Please fill out the common data once. The system has automatically shown the required checklists below based on your selection.

Common Application Data

Client Details

Client Name: 7 Service EDRPOU Code: 0000001

Legal Address: Київ Production Address: Київ

Management Details

Director's Full Name: Євгеній Миконаков Responsible Person from Company for System Management: Євгеній Миконаков Number of Employees (in scope) *: 150

Audit History

Date of Last Management Review *: 02/23/2026 Date of Last Internal Audit *: 03/03/2026 Number of Shifts: 3

Checklist: ISO 9001 (Quality)

Clause	Developed?	Document Name / Procedure
4.1 Understanding the organization and its context	<input checked="" type="radio"/> Так <input type="radio"/> Ні	Н-01-СМ «Настанова інтегрованої системи менеджменту»
4.2 Understanding the needs and expectations of interested parties	<input checked="" type="radio"/> Так <input type="radio"/> Ні	Н-01-СМ «Настанова інтегрованої системи менеджменту»
10.3 Continual improvement	<input checked="" type="radio"/> Так <input type="radio"/> Ні	Н-01-СМ «Настанова інтегрованої системи менеджменту»

[Back to Phase 1](#) [Continue to Phase 2](#)

5.2. Phase 2: Define Scope & Assign Auditors

You will notice the client's data is pre-populated based on your selection in the first step, including their scope of activity. You can add additional manual data in the **"Scope of Certification"** field if needed. Note that any data entered manually here takes priority over the pre-selected data, so use this mandatory field carefully. Next, define the Audit Team: **Certificate Decision Maker, Lead Auditor, Audit Team Members, and Technical Staff**. Selecting the Decision Maker and Lead Auditor is mandatory, as their names will automatically populate the final documents for signing. The specific data for each assigned staff member will be appended to the corresponding final documents. When adding the **Scope of Activity (NACE Codes)**, you do not need to search manually. Simply type the corresponding code (e.g., "58.11"), and the system will display everything related to that NACE Code, such as the Ukrainian DKPP Code 58.11 "Printed Books". Select the appropriate code and repeat for any others. If you fully populated this field when creating the client, the full data will already be visible. To correctly map NACE Codes to the Ukrainian Standard Classification, the system defaults to adding only the numbers of those NACE Codes in the IAF Codes field. Leave these numbers intact to ensure accurate classification against Ukrainian Legislation. You can remove them if a mistake was made, or add them later.

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Phase 2: Define Scope & Assign Auditors

Company Details

Client / Company Name *	EDRPOU Code *
7 Service	0000001
Legal Address *	Production Address *
Kyiv	Kyiv
Director's Full Name *	Number of Employees (in scope) *
Євгеній Миколайович	150
Number of Shifts	
3	
Scope of Activity (NACE Codes)	
<div style="border: 1px solid #ccc; padding: 2px;"> DKPP 011 - Annual and seasonal crops DKPP 0112-0001 - Tobacco, wine raising, fruiting DKPP 0112 - Mass fruit DKPP 0111 - Wheat DKPP 26.40 - Consumer electronics </div>	
Select codes relevant to the scope of certification.	
<hr/>	
Certification Details	
Scope of Certification *	
test	
This field is pre-filled with the default scope. You can edit it if needed.	
IAF Codes	Food Chain Category
011, 0111, 01111, 0112, 0121, 0111.2, 0126	e.g., C, G, K
<small>Enter relevant IAF codes, separated by commas if multiple.</small>	<small>Enter the relevant food chain category (e.g., C, D, G).</small>

5.3. Phase 3: Audit Validity Calculation

If the previous steps were completed correctly, all data should be populated except the **Contract Price**. The App automatically generates the Contract between your C.B. and the Client. Enter the price on the left side of the screen, and it will be automatically converted according to Ukrainian Legislative standards.

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Phase 3: Audit Validity Calculation

Input Parameters

These parameters influence the default calculation. Complexity/Risk is based on IAF MDS guidance.

Number of Employees (in scope) 150 <small>(Value from Phase 2)</small>	EMS Complexity Medium	OHSMS Complexity Medium
QMS/ABMS Risk Medium		

Audit Duration (Days)

Values are calculated based on inputs and standards. You can override them here. Use decimal points for half days (e.g., 2.5).

QMS Initial (IAF MDS)
8

TOTAL Initial Audit Days
8
(Sum of applicable standards, or apply MDTI reduction)

Surveillance Audit Days
3
(Approx. 1/3 of Initial, min 1 day)

Contract Details

Contract Price (UAH) 60000.00	Price in words (Auto-generated) 60 000,00 грн.
----------------------------------	---

[Back to Phase 2 \(Scope\)](#) [Continue to Review](#)

5.4. Phase 4: Review and Generate

This is the final phase where you can review all data destined for the Standard Certificates. When printing the official Certificate document, you must choose your scope output format. If you activate the blue toggle switch, both the automated NACE descriptions and your manual text will print on the final documents. If left inactive, only your manually entered text in the **"Scope of Certification"** field will be printed. If everything looks correct, click **"Confirm and Generate"**. Congratulations, you have issued your first Certificates using the CB Automation App!

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Phase 3: Review and Generate

Please review the details before final generation: Check the Final Scope: The text below shows exactly what will be saved to the database. It combines your manual text with the descriptions of the NACE codes you selected.

Type of Certification	Initial Certification
Applicable Standard(s)	ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT); ISO 9001:2015, IDT) «Системи управління якістю. Вимоги» ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT) «Системи управління якістю. Вимоги» ISO 9001:2015 «Quality management systems – Requirements»
Client / Company Name	7 Service
Scope of Certification	Full Text Scope (includes descriptions): test; Культури одnorічні та дворічні; Кукурудза; Складовожно; Оптова торгівля фруктами й овочами; Книги друковані
Lead Auditor	Аліна Бількевич
Audit Duration (Days)	TOTAL Initial Audit Days: 8 days Surveillance Audit Days: 3 days

Append NACE/DKPP Code descriptions to the Scope text?
WARNING: If "No" is selected, the certificate will show ONLY the manual text entered in Phase 2. Code descriptions (e.g., "Manufacture of...") will NOT be added.

[Back to Audit Validity](#) [Confirm and Generate](#)

You will see this final confirmation:

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Generation Complete!

The urgent certification process is complete. The application and certificate(s) have been generated.

Generated Application Reference: 80143.APP.089.03-26

Generated Certificate(s)

80143.QMS.050.01-26 (ISO 9001:2015)	Download (.docx)
80143.QMS.EN.050-26 (DSTU EN ISO 9001:2018 (Quality Management Systems))	Download (.docx)
80143.QMS.050-26 (DSTU ISO 9001:2015 (Quality Management Systems))	Download (.docx)

[Back to Dashboard](#) [Start New Urgent Process](#)

6.0. Managing Issued Certificates

Click "**Back to Dashboard**", then navigate to "**Manage Applications**". Click "**View / Manage**". You are now at the Main Screen for your recently issued Certificate(s). Here, you can:

6.1. Print the recently issued Certificates as DOCX (Word) or PDF documents. If you uploaded staff signatures during setup, those signatures will appear alongside their printed names. The certificate is signed by the Lead Auditor by default.

6.2. View, print, or save all foundational documents associated with the certificate. To save time, click "**Download All (ZIP)**" to download all 26 supporting documents simultaneously as a compressed archive.

Urgent Certificate Generation

[Cancel and Go to Dashboard](#)

Generation Complete!

The urgent certification process is complete. The application and certificate(s) have been generated.

Generated Application Reference: 80143.APP.089.03-26

Generated Certificate(s)

80143.QMS.050.01-26 (ISO 9001:2015)	Download (.docx)
80143.QMS.EN.050-26 (DSTU EN ISO 9001:2018 (Quality Management Systems))	Download (.docx)
80143.QMS.050-26 (DSTU ISO 9001:2015 (Quality Management Systems))	Download (.docx)

[Back to Dashboard](#) [Start New Urgent Process](#)

Admin Dashboard

Database Management

- [Manage Applications](#)
- [Manage Certificates](#)
- [Manage Clients](#)

Surveillance Status

Surveillance Status

0 Surveillance (Urgent < 5)

System

- [System Settings](#)
- [System Security & Logs](#)
- [Email Notification Settings](#)

All Applications

Total Applications: 83

[Back to Dashboard](#)

Items per page: 30

Client Name	Reference #	Date	Status	Actions
7 Service	80143.APP.089.03-26	2026-02-17	Certified	View / Manage

Manage Application: 80143.APP.089.03-26

[Delete Application](#) [Back to Dashboard](#)

Certificate Number	Standard	Issue Date	Actions
80143.QMS.050.01-26	ISO 9001:2015 «Quality management systems»	2026-03-19	Edit
80143.QMS.EN.050-26	ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT; ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	Edit
80143.QMS.050-26	ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	Edit

Client Application Details

Client / Company Name: 7 Service
EDRPOU Code: 0000001
Legal Address: Київ

Application Date: 17.02.2026
Email Address: 0000001@auto-generated.local
Production Address: Київ

Applicable Standard(s):
 Quality management systems, Quality management systems – Requirements, Quality management systems – Requirements

Scope of Certification:
 test; Культурні одяряні та дворічні; Кукурудза; Силоволожно; Оптова торгівля фруктами й овочами; Книги друковані

Issued Certificates

- ISO 9001:2015
 80143.QMS.050.01-26

 TI R B
- ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT; ISO 9001:2015, IDT)
 80143.QMS.EN.050-26

 TI R B
- ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT)
 80143.QMS.050-26

 TI R B

Workflow Management

Update Application Status:

Assign Audit Team

Lead Auditor:
 (Only personnel marked as "Lead Auditor" are shown)

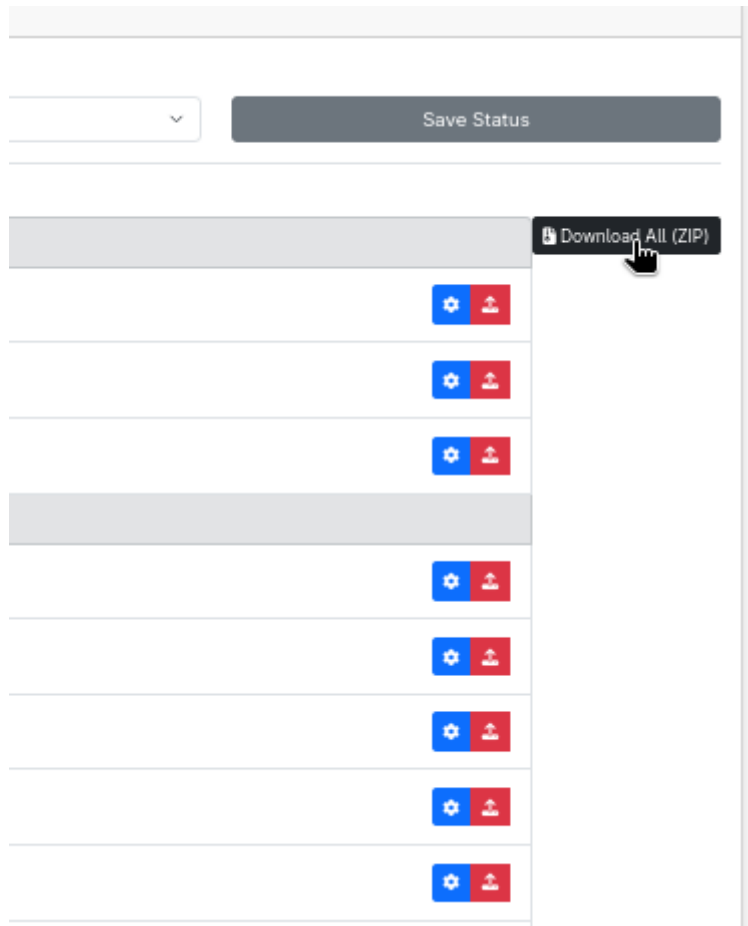
Audit Team Members:
 (Auditors and Technical Experts)

A) Application Phase [Download All \(ZIP\)](#)

Generate Application Form	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Generate Contract	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Questionnaire (ISO 9001)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
B) Pre-requisites & Stage 1			
CB Decision (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Auditor Competence Protocol	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Order (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Audit Schedule (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Opening Meeting Protocol (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Closing Meeting Protocol (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Audit Report (Stage 1)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Audit Programme (Full Cycle)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Audit Time Calculation	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
C) Stage 2 & Certification			
Audit Plan (Stage 2)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>
Order (Stage 2)	● Not uploaded	<input type="button" value="🔄"/>	<input type="button" value="🗑️"/>

Uploaded Client Documents

No documents have been uploaded by the client for this application yet.



6.3. Workflow Management

Use the Workflow drop-down to suspend an entire Application (e.g., if the client is missing documents), hold it "In Review," or "Recertify". *Warning:* Applying a status here affects the entire Application. If you issued multiple certificates under one application, this action applies to all of them. (To change the status of a single certificate, see Section 7) .

Workflow Management

Update Application Status:

Certified

- Draft
- Submitted
- In Review
- Approved
- Rejected
- Certified
- Recertified

Save Status

Download All (ZIP)

⚙️

⬆️

⚙️

⬆️

❌ NOT uploaded

6.4. You can also completely delete an application using the **"Delete Application"** button if a critical error was made and you need to restart the process.

CB Automation (© 2025 ТОВ «Консалтинг UA-RO») EN | UA marius

Manage Application: 80143.APP.089.03-26 [🔗](#) 🗑️ Delete Application ← Back to Dashboard

🌟 Issued Certificates

Certificate Number	Standard	Issue Date	Actions
80143.QMS.050.01-26	ISO 9001:2015 «Quality management systems»	2026-03-19	🔗 Edit
80143.QMS.EN.050-26	ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT; ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	🔗 Edit
80143.QMS.050-26	ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	🔗 Edit

6.5. The **"Edit"** buttons (and the small pencil icon near the Application number) allow you to correct specific errors without deleting the entire record.

7.0. TIPS & TRICKS: Correcting Errors & Legacy Certificates Scenario:

You issued a Certificate, but the client postpones payment, or a mistake was made. You cannot delete the application because it would disrupt the sequential numbering of other recently issued certificates.

Solution: You can either Suspend the certificate (if already delivered) or, if unspent, edit the certificate number to match the new payment date.

Issued Certificates

Certificate Number	Standard	Issue Date	Actions
80143.QMS.050.01-26	ISO 9001:2015 «Quality management systems»	2026-03-19	Edit
80143.QMS.EN.050-26	ДСТУ EN ISO 9001:2018 (EN ISO 9001:2015, IDT; ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	Edit
80143.QMS.050-26	ДСТУ ISO 9001:2015 (ISO 9001:2015, IDT) «Quality management systems – Requirements»	2026-03-19	Edit

standard

ISO 9001:2015 «Quality management systems»

Certificate Number

80143.QMS.052.01-26

Warning: Changing this number will update the Global Counter in settings.php. Please verify the Settings page after saving if you make a large jump.

standard

ISO 9001:2015 «Quality management systems»

Certificate Number

80143.QMS.052.01-23

Click the "Edit" button next to the Certificate.

Adjust the sequential number (e.g., from 50 to 52) to bypass taken slots.

You can also change the year suffix (e.g., from -26 to -23) to backdate legacy certificates.

The pencil icon next to the main Application Number serves the same function for the parent application record.

Registering Legacy Certificates (Triggering Surveillance):

If you backdate a certificate (e.g., to 2024), the system automatically schedules its required Surveillance audits.

Edit the Certificate Number to reflect the past year (e.g., change -26 to -25).

Go to "Admin Master Editor". Locate the legacy application and click Edit to verify the data.

Navigate to the "Certificates" tab within the Master Editor.

Click the yellow "Edit" button (calendar icon) next to the legacy certificate.

Update the Issue Date and Expiry Date. (Note: Date format must be Month/Date/Year, e.g., 04/20/2025 to 04/19/2028, to comply with IAF CERT Database requirements).


Crucial Step: Ensure the "Shift Surveillance Dates" toggle is turned ON. This forces the App to immediately calculate and schedule the upcoming surveillance audits based on your backdated timeline.

You may also set the Certificate Status here (Active, Suspended, Withdrawn, Expired).

Manage Application: 80143.APP.089.03-26

Edit

Edit Application Number

 Changing this will strictly update the database record. It allows correcting sequence errors manually.

Application Number

80143.APP.089.03-24

Close

Save Changes

System

- System Settings
- System Security & Logs
- Email Notification Settings
- Theme Settings
- Database Nomenclature Sync
- Edit CB Details (Future)
- Admin Master Editor**

Редактор Майстер-Даних та Інструмент Виправлення

[← Back to Dashboard](#)

[All Applications](#) [Certificates](#)

Search laws (e.g. FSSC update, ISO 9001)...

Actions

ID	Reference / Client Name	Status	Actions
87	80143.APP.089.03-24 7 Service	OK	Edit

Edit Client: 80143.APP.089.03-24

Зона Критичного Виправлення (IAF та NACE)

Коди IAF (Ручне Виправлення) NACE Codes (Scope Source)

Швидке Виправлення

* Виправте помилки "INVALID" тут.

1 - Сільське господарство, лісове господарство та рибальство

EDRPOU Code

Client Name (UA) **Client Name (EN)**

Автозаповнення з UA, якщо порожньо


ПІБ Директора (UA) **Director Name (EN)**

Legal Address (UA) **Legal Address (EN)**

Production Address (UA) **Production Address (EN)**

Scope of Certification (UA) **Scope of Certification (EN)**

Now I go to change the issued date. For this I click on **“Certificates”**

 **Редактор Майстер-Даних та Інструмент Виправлення**

ID	Reference / Client Name	Status	Actions
87	80143.APP.089.03-24 7 Service	OK	<input type="button" value="Edit"/>

I found the Certificate of last year I need to change it's issued dates and I click on the yellow button **“EDIT”** (has a icon of calendar telling you you're about to change a date:

Search laws (e.g. FSSC update, ISO 9001)...

Actions

ID	Certificate Number	Client Name	Дати	Status	Actions
360	80143.QMS.050-26	7 Service	2026-03-19 to 2029-03-18	Active	Edit
359	80143.QMS.EN.050-26	7 Service	2026-03-19 to 2029-03-18	Active	Edit
358	80143.QMS.050.01-25	7 Service	2026-03-19 to 2029-03-18	Active	Edit

In the next screen, I can change the date of both issuing and expiring:

Edit: 80143.QMS.050.01-25

Issue Date
03 / 19 / 2026

Expiry Date
03 / 18 / 2029

Status
Active

Shift Surveillance Dates (+1y, +2y)

Apply Date Changes

Very important, please keep “**Shift Surveillance Dates**” **turned on** just like in the picture, so the App will immediately take over and schedule Surveillance for this older Certificate. Also, here for the first time you can decide to change the Status of the issued Certificate to **Active** (Status by default) or **Suspended, Withdrawn, Expired** just like in the picture below:

Edit: 80143.QMS.050.01-25 ✕

Issue Date
03 / 19 / 2026 📅

Expiry Date
03 / 18 / 2029 📅

Status
Active ▼

- Active
- Suspended
- Withdrawn
- Expired

For our test we will keep for now the Certificate as *Active*, but change the issuing dates to be last year.

Edit: 80143.QMS.050.01-25 ✕

Issue Date

04 / 20 / 2025 📅

Expiry Date

04 / 19 / 2028 📅

Status

Active ▾

Shift Surveillance Dates (+1y, +2y)

🚀 Apply Date Changes

Now we go to “**Upcoming and Overdue Audits**”

Surveillance Status

Surveillance Status

- 0 Surveillance (Urgent < 5)
- 0 Surveillance (30 Days)
- 0 Audit In Progress
- 335 total active certificates.

Open Surveillance List

📅 Upcoming & Overdue Audits

ТОВ «РАПАС» Code: 45706141 Зенюк Т.В.	80143.EMS.027.01-25 Issued: 2026-03-12	Suspended	2027-03-11 Days Remaining: 356	Surveillance OK
ТОВ «РАПАС» Code: 45706141 Зенюк Т.В.	80143.FSMS.024.01-25 Issued: 2026-03-12	Suspended	2027-03-11 Days Remaining: 356	Surveillance OK
7 Service Code: 0000001 Євгеній Миколайович	80143.QMS.050.01-25 Issued: 2025-04-20	Active	2026-04-19 Days Remaining: 30	Surveillance (30 Days)

Managing Surveillance:

Once backdated, navigate to "Upcoming and Overdue Audits". Your legacy certificate will now appear in the Surveillance list.

Automated Reminders

: The server automatically checks this list daily. When a surveillance audit is 30 days away, the system automatically emails the client (or broker) to schedule the audit.

Scheduling the Audit

: From the "Admin Dashboard", click "Open Surveillance List". Click "Manage" next to the specific client.

In the Manage Surveillance screen, you can manually trigger reminder emails, assign the Audit Team, print the required DOCX Surveillance documents, and ultimately record the final decision ("Continue Certification" or "Suspend Certification"). You can also leave internal notes for the audit team.

IAF CERTSEARCH API Sync:

Documentation covering the automated IAF Database reporting will be provided in a dedicated API Reference Guide. Check our website for updates or contact support@consulting-ua.eu.

Admin Dashboard

Database Management

- Manage Applications
- Manage Certificates
- Manage Clients
- Broker Management
- Manage Staff
 - Manage Auditor Colors
- Company Certificate Overview
- Search Clients
 - Financial & Legal OSINT**
- Manage Regulatory Laws

Surveillance Status

Surveillance Status

- 0 Surveillance (Urgent < 5)
- 0 Surveillance (30 Days)
- 0 Audit In Progress
- 335 total active certificates.

[Open Surveillance List](#)

[Upcoming & Overdue Audits](#)

System

System Settings

- System Security & Logs
- Email Notification Settings
- Theme Settings
- Database Nomenclature Sync
- Edit CB Details (Future)
- Admin Master Editor**
- Reset Application Data... (Disabled)**

Surveillance Status

[Back to Dashboard](#)

SURVEILLANCE OVERDUE 0

SURVEILLANCE (URGENT < 5) 0

SURVEILLANCE (30 DAYS) 1

TOTAL SCHEDULED AUDITS

Surveillance 1:	348	1
Surveillance 2:	348	2
Total:	696	

Upcoming and Overdue Audits

Client Name	Certificate #	Contact Recipient	Audit Type	Next Surveillance Due	Status	Auditor		Actions
7 Service	80143.QMS.050.01-25 ISO 9001:2015	Client 0000001@auto-generated.local	Surveillance 1	2026-04-19 (Due in 30 days)	Surveillance (30 Days)	Аліна БІЛЬКЕВИЧ	-	Manage

Upcoming and Overdue Audits

Status	Auditor		Actions
Surveillance (30 Days)	Аліна БІЛЬКЕВИЧ	-	Manage

Manage Surveillance Audit

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Client & Certificate Details

Client Name: 7 Service	Certificate Number: 80143.QMS.050.01-25	
Legal Address: Київ	Production Address: Київ	
Due Date: 2026-04-19	Status: Active	Contact: 0000001@auto-generated.local 380985781768

Audit Team & Status

ASSIGN LEAD AUDITOR	STATUS
Аліна БІЛЬКЕВИЧ	Scheduled
ASSIGN TEAM MEMBERS	
Marius Аліна БІЛЬКЕВИЧ	

Client Communication Tracking (Proof)

30-Day Reminder Not Sent	Send
Client Confirmed Receipt (Email 1)	Mark as Complete
5-Day Reminder Not Sent	Send
Client Confirmed Receipt (Email 2)	Mark as Complete

Generated Surveillance Documents

Surveillance Task Assignment	Generate Document
Audit Plan (Surveillance)	Generate Document
Audit Schedule (Surveillance)	Generate Document

ASSIGN LEAD AUDITOR

Аліна БІЛЬКЕВИЧ

STATUS

Scheduled

ASSIGN TEAM MEMBERS

Marius
Аліна БІЛЬКЕВИЧ
Валентин ВІЛІНСЬКИЙ
Василь ДУБИНА

[Save Team](#)

Surveillance Audit Decision

Outcome Decision

Continue Certification

Continue Certification

Suspend Certification

[Submit for Final Review](#)

Generated Surveillance Documents

Surveillance Task Assignment	Generate Document
Audit Plan (Surveillance)	Generate Document
Audit Schedule (Surveillance)	Generate Document
Opening Meeting Protocol (Surv)	Generate Document
Client Reference Letter (Surv)	Generate Document
Surveillance Audit Report	Generate Document
Closing Meeting Protocol (Surv)	Generate Document
CB Decision (Surveillance)	Generate Document

Supplementary Documents

Decision (Grant/Re-issue)	Generate Document
Decision (Cancel/Issue New)	Generate Document
License Agreement	Generate Document
Surveillance Application	Generate Document

Visit us at <https://consulting-ua.eu/index.php> for future updates or send us an email to support@consulting-ua.eu