



# **LIFTSAFE CUSTOMER PORTAL HANDBOOK**

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EVERYTHING YOU NEED TO KNOW TO GET STARTED

# Liftsafe Customer Portal

## Custom tracking and ordering software

Over the past three decades of business development and growth, the Liftsafe Group of Companies has always looked for new strategies to improve how our clients are able to operate efficiently. In 2015, we saw a need to provide our customers with a secure online system to allow our clients to schedule and keep track of their inspections and repairs, while eliminating the need for paper records. We invested time and resources in creating a custom software system to improve our customer’s experience while saving them time and money.

## Is it time to take your inspections and repairs online?

The contents of this handbook will help you determine your documentation and compliance framework and serve as an instructional guide for using our online platform.

**Learn about...**

- The signs you need the Liftsafe Customer Portal
- How our online portal can help you
- Step by step portal instructions
- Frequently asked questions



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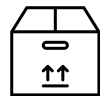
# Signs you need the Liftsafe Customer Portal

Here are some signs it may be time to upgrade from paper records and start managing your inspections and repairs more efficiently.



## No single source of information

If you find yourself organizing and managing multiple installations, inspections and repairs for your facility, Liftsafe can provide the solution. Not only are we a single source for all your facility needs, but you can book, set reminders and house documents all in one online system.



## Lost time when booking

Don't waste hours trying to source, contact, request quotes and book your inspections and repairs for multiple pieces of equipment. You can easily book online with our customer portal, and once in the system, automatic reminders can be set for upcoming inspections so your equipment will always stay safety compliant.







## Reports are hard to share

We understand that paperwork can be a nightmare, and keeping track of years worth of inspection and repair documentation only adds to the clutter. Keep everything housed online in our secure portal database, where you can view, update, store, download and share your files.



## Potential data loss with no backup

Find yourself needing to provide proof of inspection ASAP with no record in sight? Our system will keep your documents secure and allow for easy access to information. Organize your data based on date, equipment type, etc.



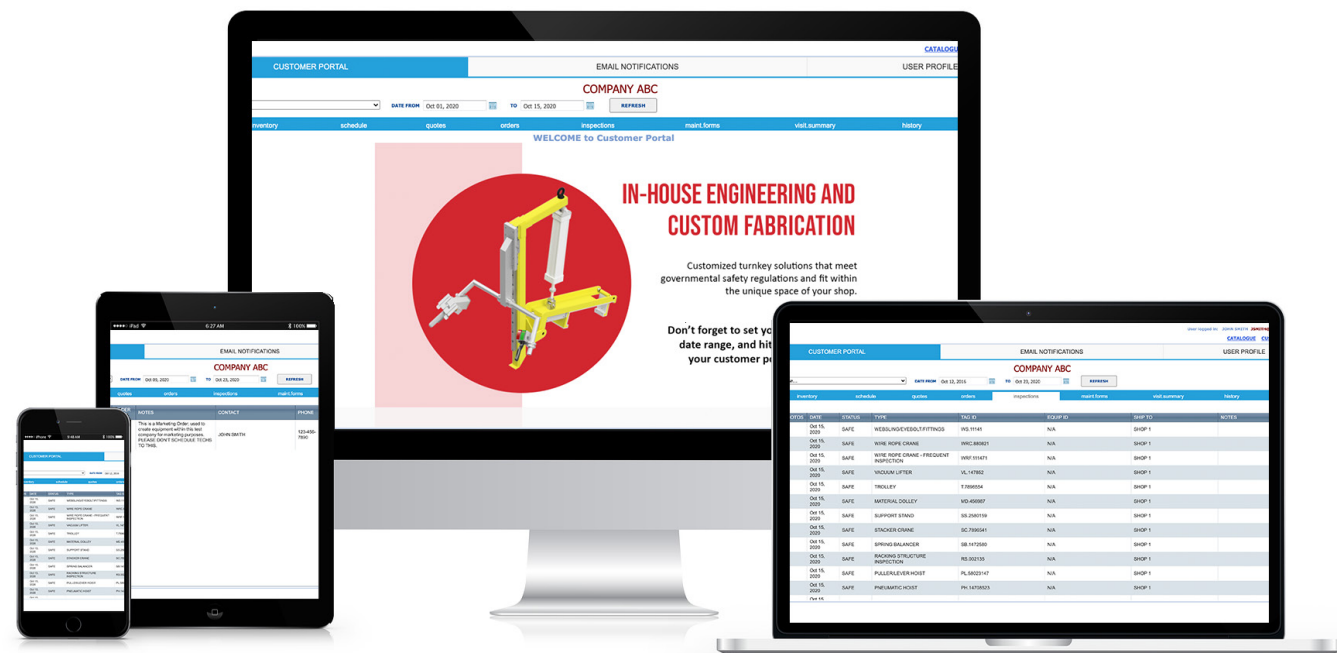
## There is no tracking

Multiple pieces of equipment, in multiple locations, serviced internally and externally can be difficult to track. Allowing our software to take the load off your shoulders could be an ideal solution with documentation that is only a few clicks away.

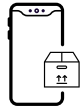


## Compliance reminders

Wish that you could set the alarm for your next inspection deadline? That is precisely what our customer portal will deliver. Customize your online reminders to keep track of when upcoming inspections are due and set reminders based on your needs.







## All of your reports in the palm of your hand

### **Your customer portal can be with you, anytime, anywhere.**

The Liftsafe Customer Portal has been updated to work on both android and IOS devices. That way you can always stay connected, no matter your location. This app will allow you to book an inspection or view your data the moment you need it.

Complementing our existing Liftsafe Customer Portal, the user-friendly Liftsafe Mobile App features the ability to view certificates and request service, all from your smart phone.



Scan history

Scan items to see their current status.



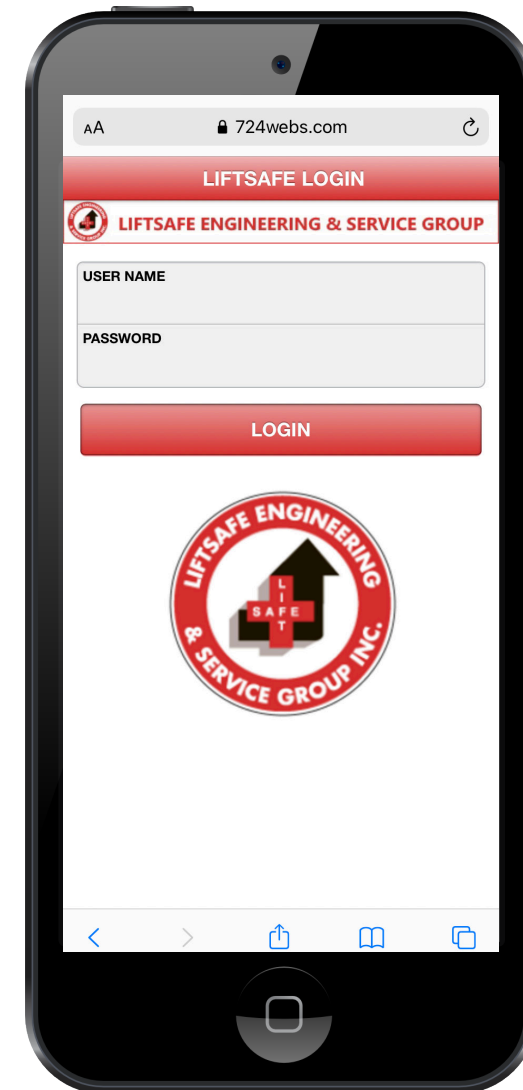
View Certificates

Load the certificate in the browser window, which can be easily panned or zoomed on your screen.



Request Service

Automatically populated with your name and email address, your request will be submitted directly to the Liftsafe team.



# What is the Liftsafe Customer Portal?

At Liftsafe Engineering and Service Group Inc., we have simplified how our customers receive their certificates, documents and reports in a timely, efficient and environmentally friendly manner. Our customer portal reporting system is designed to give you 24-hour access to your reports, certificates and inspections. This online tool eliminates the need for paper records and contains a detailed inventory of your equipment.

## How can we support?

- Paperless reporting
- Free access for all current customers
- Full summary report of all inspections and orders
- Full access of inspection and equipment records 24/7
- Manage equipment tasks, approvals and automate inspections
- Complete inventory of equipment with documented photos
- Advanced sorting and segmentation functionality
- Advanced data analysis with year to year data
- Available as an app for iOS and Android
- Unlimited document uploads and storage
- Full-service tracking of your equipment
- Review and approve repair quotations
- Real-time updates and notifications
- Complete cost analysis of projects
- Free portal training provided
- Secure access to all files

## One stop online solution



### Step 1: Track

Sort and track the orders, repairs and inspections of your equipment by date, time and location.



### Step 2: Schedule

Schedule multiple equipment inspections and repairs on an immediate and annual basis.

### Step 4: Approve

Request changes to quotes and orders at any time.



### Step 3: Edit

Approve all outstanding orders and quotes remotely at any time.



# Services & Functions

## Account Set-Up

Learn how to personalize your account notifications and reset your password.

## Customer Portal Login

We identify how to login to the secure customer portal and where to get assistance.

## Inventory Tab

We provide you with complete inventory control and authority.

## Schedule Tab

Sort and review upcoming and past projects.

## Quotes Tab

Identify and approve your outstanding quotes.

## Orders Tab

View and approve outstanding orders.

## Inspections Tab

View, organize and print all of your inspection data.

## Maintenance Tab

View all maintenance documentation and records.

## Site Visit Summary

Generate an overview report of the work performed and the status of your equipment.

## History Tab

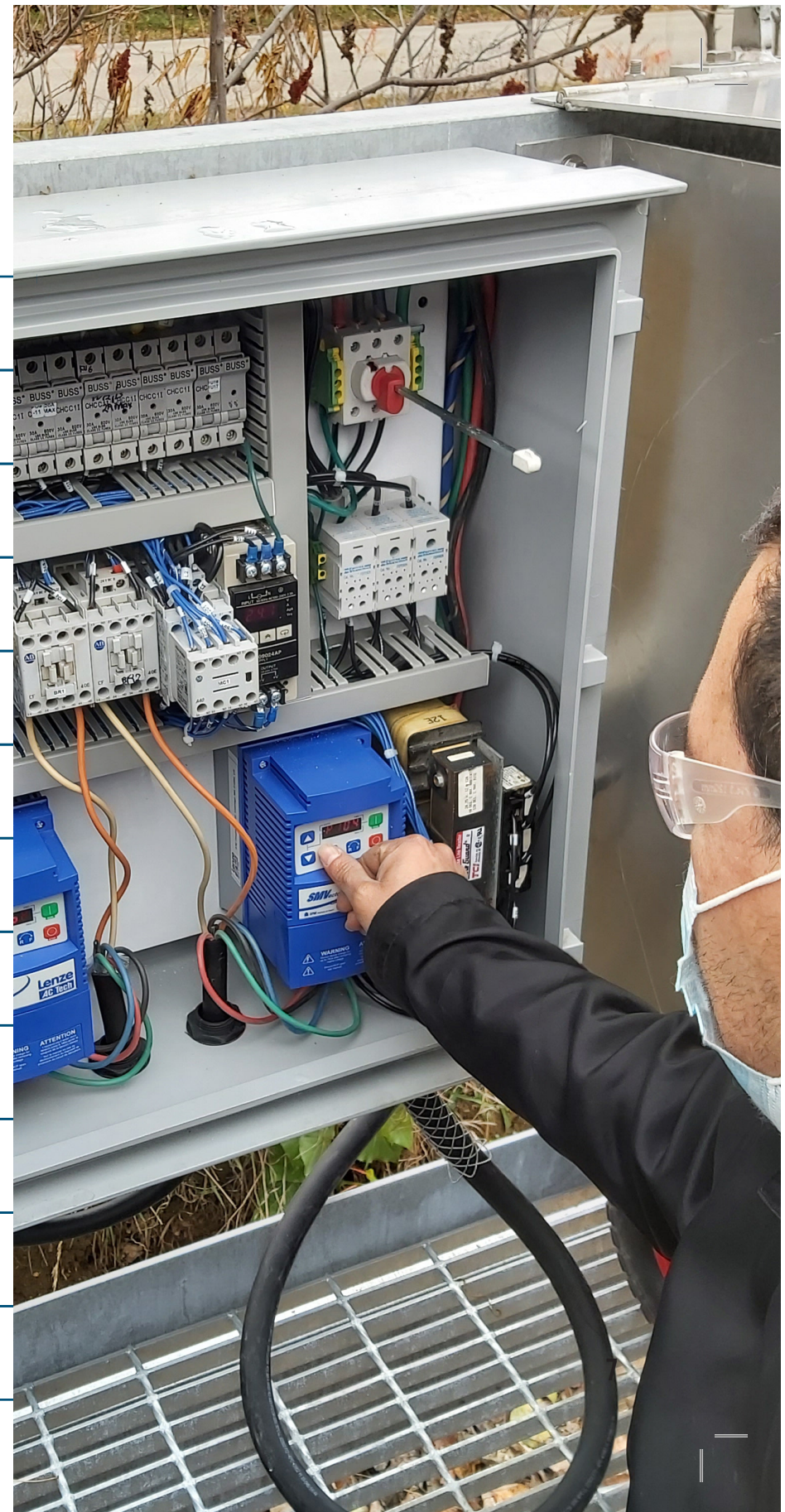
A high-level overview that identifies all work completed within a given time frame.

## Documents Tab

Access and upload relevant documents for any piece of equipment.

## FAQ

Get your questions answered. Our most frequently asked questions by our current users.



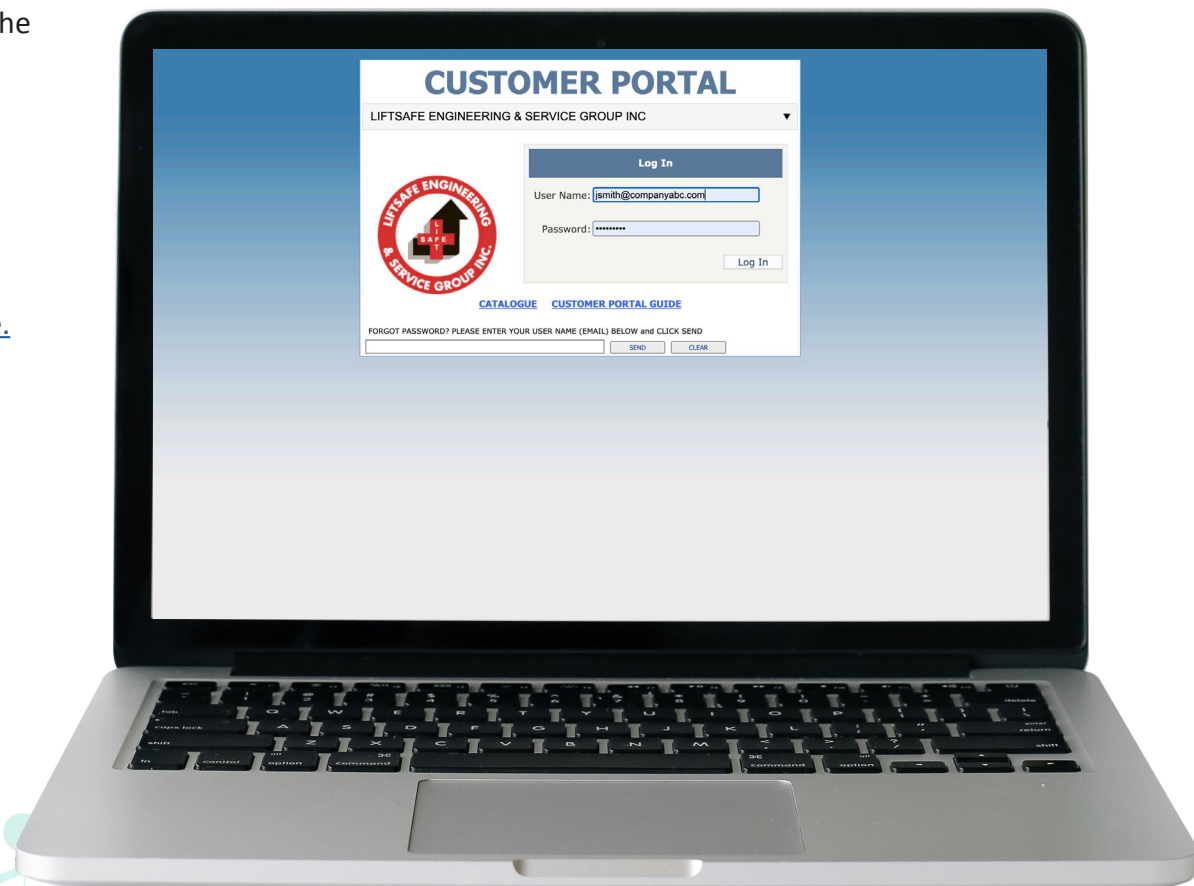


# Getting started

As a customer of Liftsafe Engineering and Service Group, you have access to our Customer Portal and all of your project information.

## How to set up an account.

- ① Our dedicated Customer Portal Representatives will get you started by setting up your account details in our system. Your secure login information will be emailed to you automatically. If you have not received this information, please contact us at the contact information below.
- ② You will be sent your username and temporary password.
- ③ We recommend changing your password once you have access. [Instructions can be found here.](#)
- ④ Continue to login details: [How to login](#)
- ⑤ If you did not receive your username and password, please contact us via one of the following methods.
  - a. Toll Free: 1-800-977-2005
  - b. Phone: 519-896-2430
  - c. Email: [info@liftsafeinspections.com](mailto:info@liftsafeinspections.com)



# How to login

The Customer Portal can be accessed via our website at the bottom of every page. It is recommended that you bookmark the following link for quick and easy access to the portal.

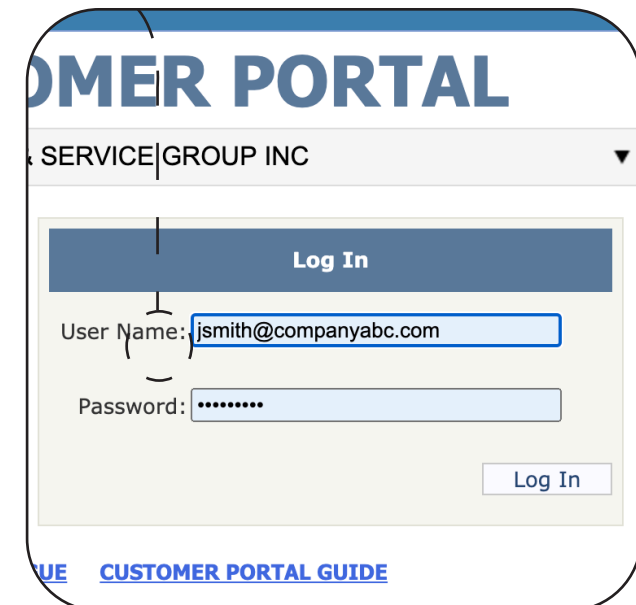
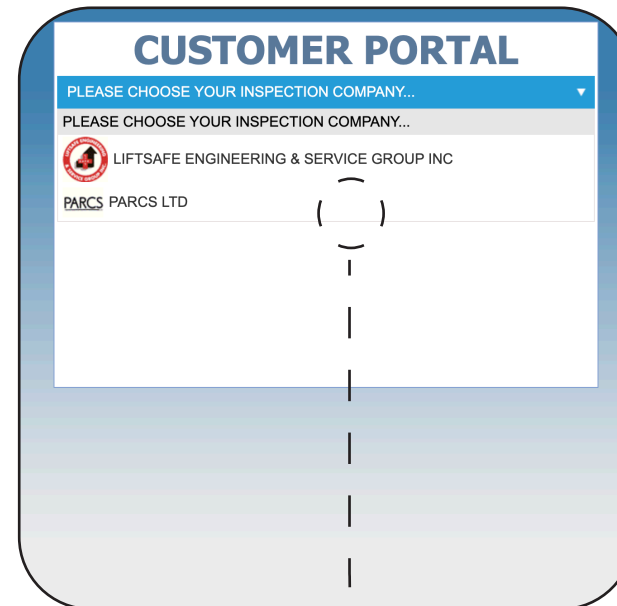
<https://724webs.com/liftsafe/CPortalLogin.aspx>

Once the Customer Portal login page is visible select LIFTSAFE ENGINEERING & SERVICE GROUP INC. from the drop-down menu.

- 1 This login screen can only be accessed by authorized representatives and requires a secure login and password for your protection.
- 2 From the drop-down menu select the company that pertains to your inspections or repairs.
- 3 Enter your user name and password.
- 4 Select the login button.

It is recommended that you keep the login and password confidential to ensure your inspection certificates, documents and quotes are kept safe.

If you are having trouble logging in you can message our team at the bottom left hand corner of the login screen, and a dedicated Customer Portal Representative will provide assistance.



# Personalize your account

CUSTOMER PORTAL EMAIL NOTIFICATIONS USER PROFILE

Once logged in, you will notice three main tabs at the top of the page reading: CUSTOMER PORTAL, EMAIL NOTIFICATIONS & USER PROFILE.

## EMAIL NOTIFICATIONS

Important: Your email notifications are pre-set to send you reminders for your inspections, and services. You can edit the frequency of notifications using the following instructions.

- 1 Once you have clicked on the email notifications tab you can select or de-select any of the boxes that do or do not apply to your account.
- 2 Once satisfied with your notification selections, click save. Not clicking save will cause your updates to be lost when you navigate away from the page.

## EMAIL NOTIFICATION OPTIONS

Daily portal notifications

- Number of new quotes posted to your account
- Number of new orders posted to your account
- Number of new inspection certificates posted to your account
- Number of new maintenance forms posted to your account
- Number of new documents posted to your account

**Outstanding service quote notifications:** Receive outstanding service and repair quote notifications and adjust the frequency of your service reminders. You can customize your notification to daily, weekly, monthly, quarterly, semi-annually and yearly.

*Note: This is a highly recommended notification to ensure you stay up to date with your repairs and inspections.*

**Outstanding inspection quotes notification:** Receive outstanding inspection quote notifications and adjust the frequency of inspection reminders. You can customize your notification to daily, weekly, monthly, quarterly, semi-annually and yearly.

**Inspection month notification:** This section allows you to determine when you wish to receive a reminder that a technician will be visiting your facility. This can be set up as a daily, weekly, monthly, quarterly, semi-annually or yearly reminder.

**Site visit notification:** These email alerts provide you with a notification when the site visit summary is available to be reviewed. It is a one-time notification when the work order is completed.

**Overdue inspection alert notification:** Receive this notification when your equipment inspection is past due. Reminders for overdue inspections can also be set up as a daily, weekly, monthly, quarterly, semi-annually and yearly notification, and you can set an automatic end to these notifications.

*Note: This is a highly recommended notification to ensure you stay up to date on your equipment inspections to meet all regulations.*

**Not-safe equipment notification:** Reminders for not-safe equipment notifications can be set up as a daily, weekly, monthly, quarterly, semi-annually and yearly alert, and you can set an automatic end to these notifications.



**Outstanding Service quote notifications:**

Receive outstanding service and repair quote notifications and adjust the frequency of your service reminders.

CUSTOMER PORTAL EMAIL NOTIFICATIONS USER PROFILE

MAXIMUM OF ONE EMAIL PER DAY WILL BE GENERATED WITH THE APPLICABLE NOTIFICATIONS

DAILY PORTAL NOTIFICATION

THE FOLLOWING NOTIFICATIONS WILL PROVIDE QUANTITY LISTING OF POSTED DOCUMENTS:

- ☐ NUMBER OF NEW QUOTES POSTED TO YOUR ACCOUNT
- ☐ NUMBER OF NEW ORDERS POSTED TO YOUR ACCOUNT
- ☐ NUMBER OF NEW INSPECTION CERTIFICATES POSTED TO YOUR ACCOUNT
- ☐ NUMBER OF NEW MAINTENANCE FORMS POSTED TO YOUR ACCOUNT

OUTSTANDING SERVICE QUOTES NOTIFICATION

- ☐ OUTSTANDING SERVICE QUOTES NOTIFICATION
- ☐ PAST DUE REMINDER - FREQUENCY MONTHLY UNTIL 0

OUTSTANDING INSPECTION QUOTES NOTIFICATION

- ☐ OUTSTANDING INSPECTION QUOTES NOTIFICATION
- ☐ PAST DUE REMINDER - FREQUENCY MONTHLY UNTIL 0

INSPECTION MONTH NOTIFICATION

- ☐ INSPECTION MONTH NOTIFICATION
- ☐ PRIOR REMINDER - FREQUENCY MONTHLY STARTING 0
- MONTHS BEFORE

SITE VISIT NOTIFICATION

- ☐ SITE VISIT AVAILABLE PER ORDER
- NOTE: ONE TIME SITE VISIT NOTIFICATION AS SOON AS WORK ORDER COMPLETED.

OVERDUE INSPECTION ALERT NOTIFICATION

- ☐ EQUIPMENT INSPECTION PAST DUE
- ☐ PAST DUE REMINDER - FREQUENCY MONTHLY UNTIL 0
- MONTHS PAST DUE

NOT-SAFE EQUIPMENT NOTIFICATION

- ☐ EQUIPMENT NOT-SAFE
- ☐ PAST DUE REMINDER - FREQUENCY MONTHLY UNTIL 0
- MONTHS PAST DUE
- NOTE: A REMINDER WILL BE SENT FOLLOWING AN INSPECTION RENDERING YOUR EQUIPMENT AS NOT SAFE. THE REMINDER NOTIFICATION WILL BE EMAILED TO YOU BASED ON THE SELECTION CRITERIA SELECTED.

PLEASE SELECT NOTIFICATION PREFERENCES AND CLICK SAVE BUTTON: SAVE

**Site visit notification:**

These email alerts provide you with a notification when the site visit summary is available to be reviewed.

**Overdue inspection alert notification:**

Receive this notification when your equipment inspection past due.

**Outstanding inspection quotes notification:**

Receive outstanding Inspection quote notifications and adjust the frequency of inspection reminders.

**Inspection month notification:**

This section allows you to determine when you wish to receive a reminder that a technician will be visiting your facility.

**Not-safe equipment notification:**

Reminders for not-safe equipment notifications can be set up as a daily, weekly, monthly, quarterly, semi-annually and yearly alert, and you can set an automatic end to these notifications.

# User Profile – reset password

The USER PROFILE tab is where you can reset your password when you first get access to your account and can be accessed at any time for security changes. Your company information and email on file will be listed. To reset your password:

- ① Click on the user profile tab. — — — — —
- ② Type in your existing password.
- ③ Type in your new password. — — — — —
- ④ Retype your new password.
- ⑤ Click save.
- ⑥ If an error occurs, please contact us via one of the following methods.
  - a. Toll Free: 1-800-977-2005
  - b. Phone: 519-896-2430
  - c. Email: [info@liftsafeinspections.com](mailto:info@liftsafeinspections.com)

CUSTOMER PORTAL    EMAIL NOTIFICATIONS    **USER PROFILE**

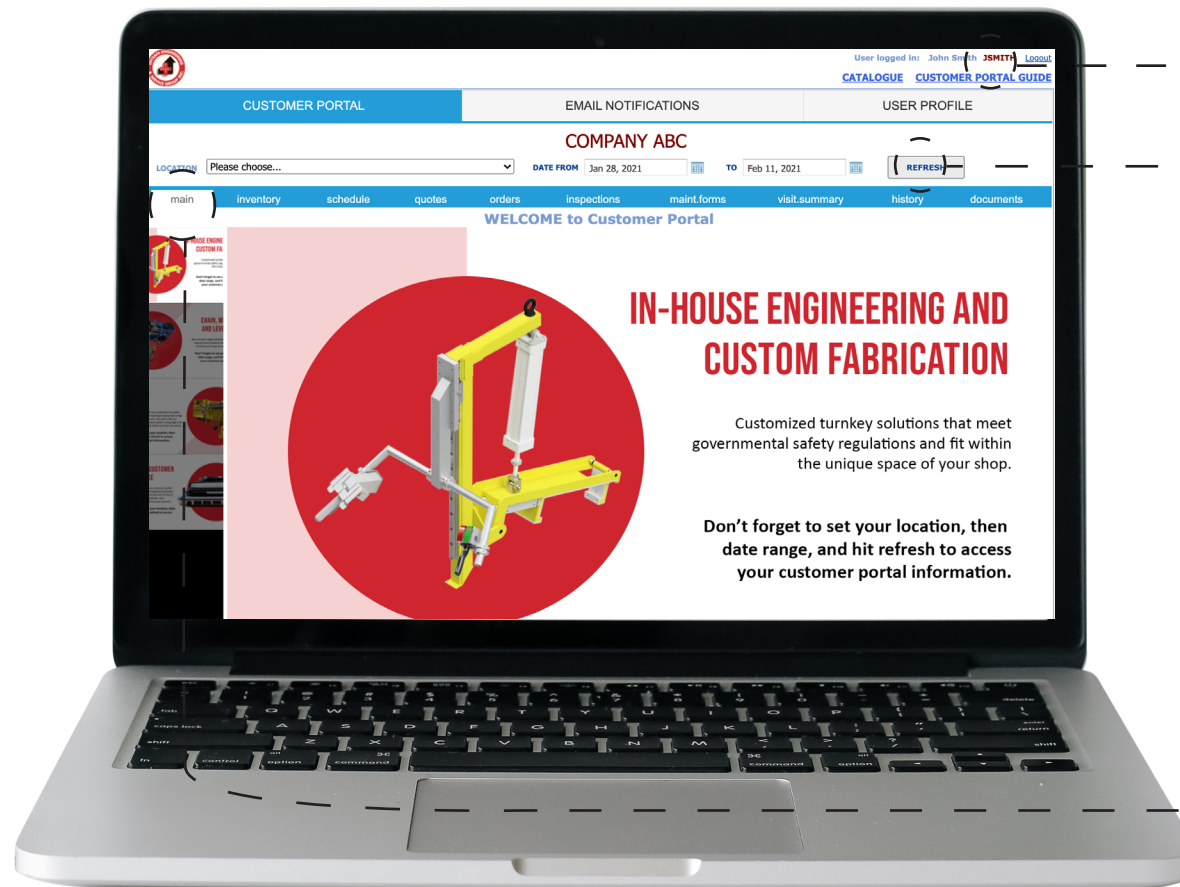
USER NAME **JSMITH**  
EMAIL **jsmith@companyabc.com**  
PASSWORD   
NEW PASSWORD   
RE-TYPE PASSWORD   
**SAVE** **CANCEL**

**USER NAME** **JSMITH**  
**EMAIL** **jsmith@companyabc.com**  
**PASSWORD**   
**NEW PASSWORD**   
**RE-TYPE PASSWORD**   
**SAVE** **CANCEL**

# Customer portal home page

The CUSTOMER PORTAL tab is where you will find all of your inspection and service data. This document will help you navigate the portals many features and processes.

The following can be viewed on all tabs:



## Top right-hand corner

- User information: login name and email is displayed
- Logout: logout of the Customer Portal at any time
- Catalogue: the Liftsafe Engineering catalogue highlights our products and services
- Customer Portal guide: a digital version of the Customer Portal Handbook

## Main search bar

Use this search bar for all tabs to narrow your search criteria by location and date.

**Important: Please remember to select refresh every time a change has been made to your selection or date range.**

## Main tab

Within the main tab of the customer portal you will see our welcome messages feature key product offers and promotions.



# Navigating the inventory tab

The INVENTORY TAB allows you to view and maintain your inventory/equipment. This is where you will book and control your inventory & inspections. This feature is included with all active Customer Portal accounts.

## HOW IT WORKS

1

LOCATION

COMPANY ABC (H.Q.)

DATE FROM

Jan 01, 2020

2

Feb 11, 2021

3

REFRESH

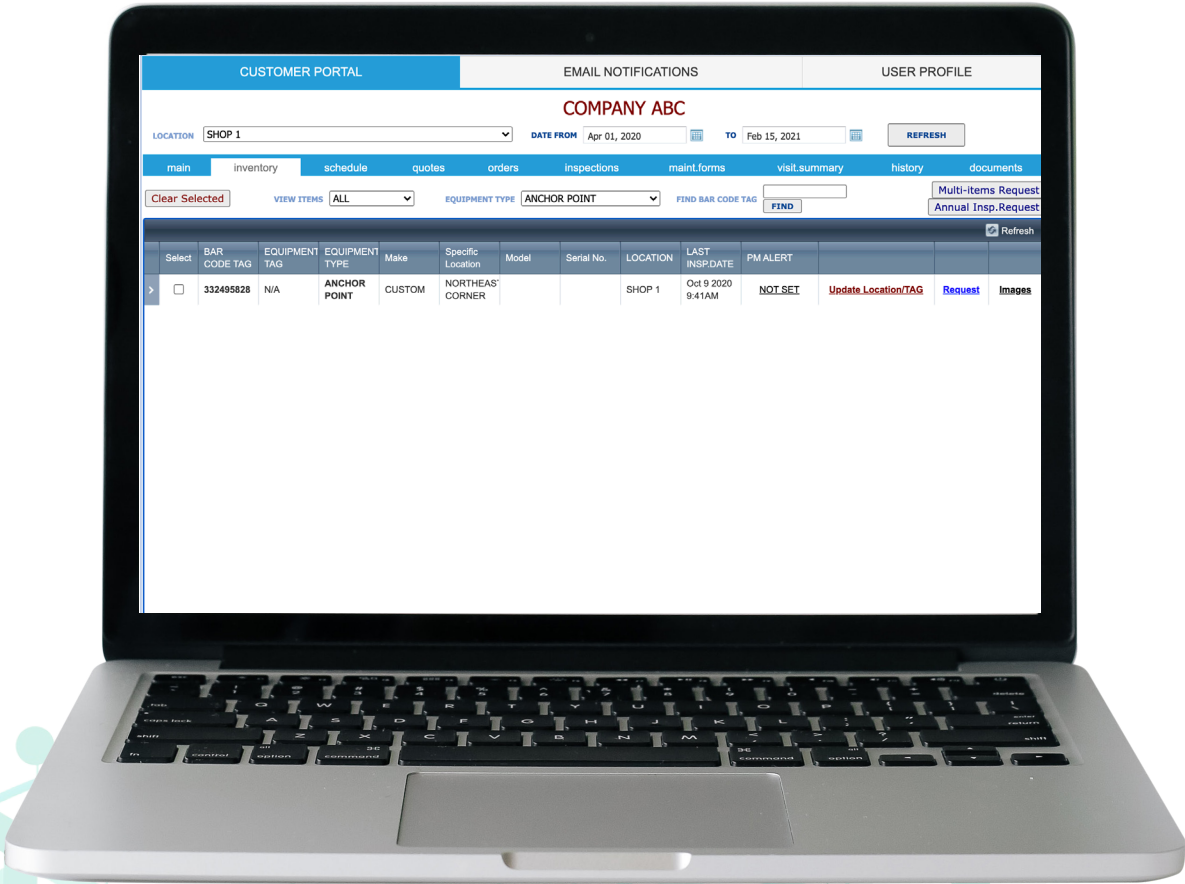
- 1 Select your location.
- 2 Select your targeted date range.
- 3 Select refresh.

### Sorting based on location

The location drop-down menu allows you to access specific information on each of your locations if applicable. To select one specific location, select the location from the drop-down menu and click.

### Sorting based on date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to select your targeted date range. Once your date range is selected, press the refresh button to update. This function allows you to filter and locate both current and old data.





## How do I refine my search?

The screenshot shows a search interface with a top navigation bar containing tabs: main, inventory, schedule, quotes, orders, inspections, maint. forms, visit.summary, history, and documents. Below the tabs, there are several search filters: a 'LOCATION' dropdown menu, a 'DATE FROM' field (Feb 01, 2021) and 'TO' field (Feb 15, 2021) with a 'REFRESH' button, a 'VIEW ITEMS' dropdown menu (set to 'ALL'), an 'EQUIPMENT TYPE' dropdown menu (set to 'Please choose...'), a 'FIND BAR CODE TAG' input field with a 'FIND' button, and two buttons: 'Multi-items Request' and 'Annual Insp. Request'. A 'Clear Selected' button is also present.

The **VIEW ITEMS** drop down menu provides the ability to filter by all and past due equipment, to find out which items require immediate attention.

**EQUIPMENT TYPE:** Specify the equipment type you wish to find. You must either select all or a specific equipment type.

**FIND BAR CODE TAG:** Search by the bar code tag of your equipment. Find specific equipment quickly.

**Important:** Clear all search data before starting a new search.



## How do I read the data?

Select	BAR CODE TAG	EQUIPMENT TAG	EQUIPMENT TYPE	Make	Specific Location	Model	Serial No.	LOCATION	LAST INSP. DATE	PM ALERT
--------	--------------	---------------	----------------	------	-------------------	-------	------------	----------	-----------------	----------

Once you have refined your search, your inventory data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders is easy and efficient. To verify if a heading is interactive you can simply scroll over the heading. If interactive a message will appear saying “click here to sort”.

### Tool Bar Includes

Bar Code Tag	Internal certificate number that Liftsafe provides when tagging equipment.
Equipment Tag	Number for the client’s external use when tagging equipment.
Equipment Type	Type of equipment that has been inspected or repaired.
Make	Equipment brand.
Specific Location	Location where the equipment was at the time of inspection within a facility.
Model	Model code for the brand.
Serial No.	Number located on the equipment.
Location	Customers site location.
Last Insp. Date	Date of last inspection performed by our team.
PM Alert	Preventative Maintenance Alert set to a frequency based on needs of equipment (monthly, annually etc.)



## How do I perform an annual inspections request? (single item)

- 1 Go to the top right corner and click on the ANNUAL INSP. REQUEST button.
- 2 This will open a pop-up window showing all of your annual inspection items for your location.
- 3 Fill in the form including:
  - a. Equipment: items you wish to have inspected.
  - b. Location: choose from the locations listed.
  - c. Message: include any additional information regarding your request.
- 4 Click the send email button.
- 5 Your request will be confirmed by one of our reps. If you encounter any issues contact us at 1-866-496-6600.

The screenshot shows a web form titled 'ANNUAL INSPECTION REQUEST'. It contains the following fields and elements:

- 1** A button labeled 'Multi-items Request Annual Insp. Request' at the top.
- 2** The form title 'ANNUAL INSPECTION REQUEST'.
- 3** A section for 'ITEM ALL ITEMS' with a dropdown menu for 'EQUIPMENT' set to 'ALL ITEMS'. Below it are fields for 'COMPANY' (set to 'COMPANY ABC') and 'LOCATION' (a dropdown menu with 'Please choose...' selected).
- Fields for 'SEND TO NAME' (set to 'LIFTSAFE'), 'SEND TO EMAIL' (set to 'support@liftsafeinspections.com'), and 'CC EMAIL' (empty).
- A dropdown menu for 'REQUEST' set to 'REQUEST FOR ANNUAL INSPECTION'.
- A text area for 'MESSAGE'.
- A field for 'REQUESTED BY' set to 'John Smith'.
- 4** A 'SEND EMAIL' button.
- A 'RETURN' button at the bottom right.



## How do I set PM Alerts?

A PREVENTATIVE MAINTENANCE alert, assigns PM frequency relative to each piece of equipment. Remember to set an email alert for your PM schedules to ensure your equipment is always properly maintained.

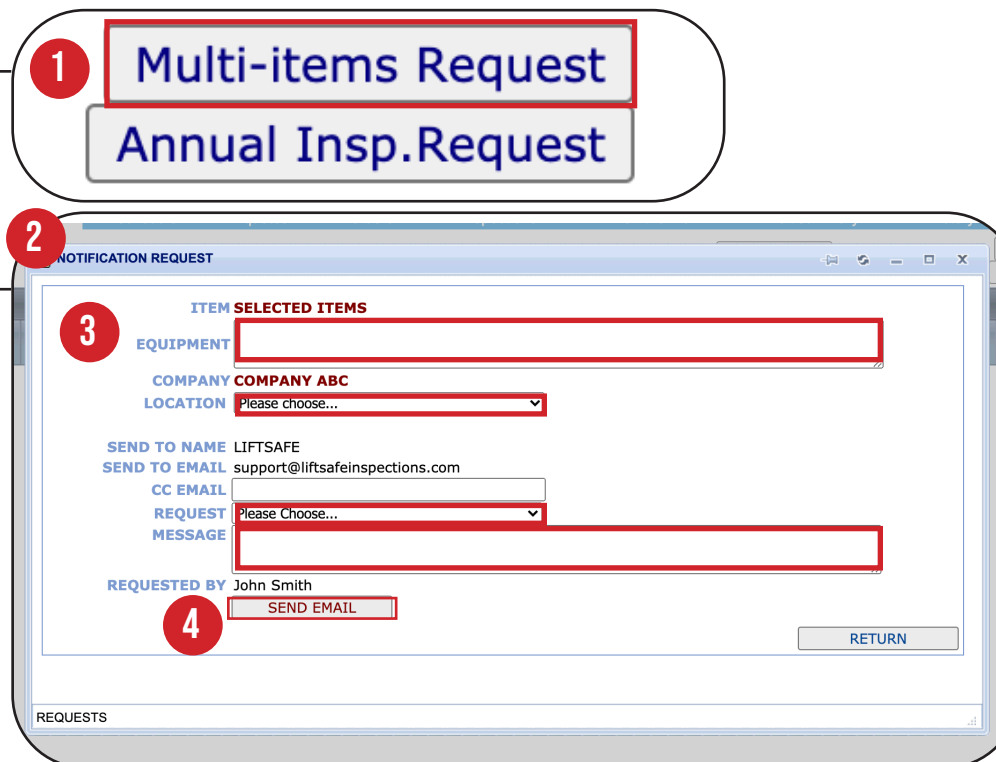
- 1 Simply go to the column that says PM alert, click on NOT SET. The update item pop-up will open and you can adjust the PM alert frequency before selecting the save button.

AG	EQUIPMENT TAG	EQUIPMENT TYPE	Make	Specific Location	Model	Serial No.	LOCATION	LAST INSP. DATE	PM ALERT
328	N/A	ANCHOR POINT	CUSTOM	NORTHEAST CORNER			SHOP 1	Oct 9 2020 9:41AM	NOT SET



## How do I submit a multi-items request?

- 1 Go to the top right corner and select the MULTI-ITEMS REQUEST button. — — — — —
- 2 This will open a pop-up window showing all of your annual inspection items for this location.
- 3 Fill in the form including:
  - a. Equipment: items you wish to have inspected.
  - b. Location: choose from the locations listed.
  - c. Request: list options.
  - d. Message: include any additional information regarding your request.
- 4 Click the send email button.
- 5 Your request will be confirmed by one of our reps. If you encounter any issues contact us at 1-866-496-6600.



1 **Multi-items Request**  
**Annual Insp. Request**

2 NOTIFICATION REQUEST

3 **ITEM SELECTED ITEMS**

EQUIPMENT

COMPANY **COMPANY ABC**

LOCATION **Please choose...**

SEND TO NAME **LIFTSAFE**

SEND TO EMAIL **support@liftsafeinspections.com**

CC EMAIL **Please Choose...**

REQUEST MESSAGE

REQUESTED BY **John Smith**

4 **SEND EMAIL**

RETURN

REQUESTS

## How do I update my tag locations? (where is my equipment)

- 1 Select update location.
- 2 Pop-up will appear with item and corresponding bar code number.
- 3 Update location from dropdown menu and select save.

	Specific Location	Model	Serial No.	LOCATION	LAST INSP. DATE	PM ALERT	
USTOM	NORTHEAST CORNER			SHOP 1	Oct 9 2020 9:41AM	NOT SET	<a href="#">Update Location/TAG</a>

## How do I remove inventory items?

Select the location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

Select	BAR CODE TAG	EQUIPMENT TAG	EQUIPMENT TYPE	Make	Specific Location	Model	Serial No.	LOCATION	LAST INSP.DATE	PM ALERT		
<input checked="" type="checkbox"/>	1 495828	N/A	ANCHOR POINT	CUSTOM	NORTHEAST CORNER			SHOP 1	Oct 9 2020 9:41AM	NOT SET	<a href="#">Update Location/TAG</a>	<a href="#">Request</a> <a href="#">Images</a>

1 Select the inventory item you wish to remove (select using the check box at the left hand side of the toolbar).

2 Click the request link in the tool bar.

3 The notification request pop-up will appear. Select REMOVE FROM INVENTORY from the request drop down menu.

4 Click the send email button.

ITEM ANCHOR POINT332495828

EQUIPMENT 332495828

COMPANY COMPANY ABC

LOCATION SHOP 1

SEND TO NAME LIFTSAFE

SEND TO EMAIL support@liftsafeinspections.com

CC EMAIL

REQUEST MESSAGE

3

REQUESTED BY

REMOVE FROM INVENTORY

REQUEST FOR SERVICE

REQUEST FOR INSPECTION

REQUEST FOR REPAIR

REQUEST FOR PREVENTIVE MAINTENANCE

REQUEST FOR ENGINEERING

REQUEST FOR PARTS

RETURN

## How to view equipment images

Select the location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

el	Serial No.	LOCATION	LAST INSP.DATE	PM ALERT			
		SHOP 1	Oct 9 2020 9:41AM	NOT SET	<a href="#">Update Location/TAG</a>	<a href="#">Request</a>	<a href="#">Images</a>

1 Click the link titled images assigned to your equipment data. A pop-up will generate with your equipment photos.

# Navigating the schedule tab

Our SCHEDULE TAB contains information on current and previously completed work based on the date range selected. This function allows you to filter and locate both current and old schedules for your reference. Within this tab you will be able to track who is coming in to perform the work and when they will be at any given location.

1

LOCATIONCOMPANY ABC (H.Q.)

COMPANY ABC

DATE FROMJan 01, 2020

2Feb 11, 2021

3REFRESH

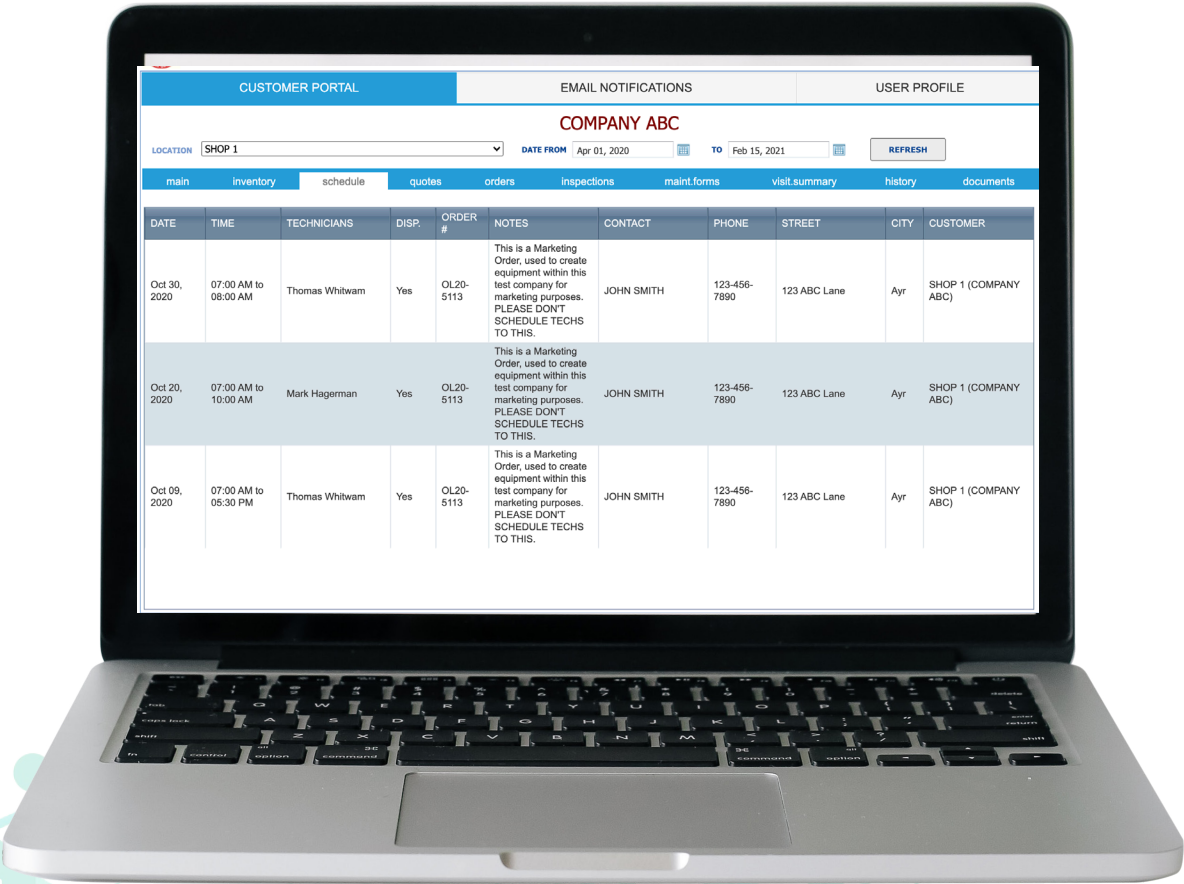
- 1Select the correct location.
- 2Select the date range.
- 3Select refresh.

### Sorting Based on Location

The location drop-down menu allows you to access specific information on each of your locations if applicable. To select one specific location, select the location from the drop-down menu and click.

### Sorting Based on Date

This field can be adjusted to any target date range and display further information on previous work. By clicking on the calendar, you will be able to check your schedule to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

DATE	TIME	TECHNICIANS	DISP.	ORDER #	NOTES	CONTACT	PHONE	STREET	CITY	CUSTOMER
Oct 30, 2020	07:00 AM to 08:00 AM	Thomas Whitwam	Yes	OL20-5113	This is a Marketing Order, used to create equipment within this test company for marketing purposes. PLEASE DON'T SCHEDULE TECHS TO THIS.	JOHN SMITH	123-456-7890	123 ABC Lane	Ayr	SHOP 1 (COMPANY ABC)

Once you have refined your search, your schedule data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders is easy and efficient. To verify if a heading is interactive, you can simply scroll over the heading, if interactive a message will appear saying “click here to sort”.

### Tool Bar Includes

<b>Date</b>	The date technicians are scheduled to be on site.
<b>Time</b>	Start work time based on when technicians clock in to start a job, time includes time spent at Liftsafe shop and travel time. Not arrival time.
<b>Technicians</b>	Name of technicians performing work.
<b>Disp.</b>	Determine if order has been dispatched.
<b>Order#</b>	Our internal order number.
<b>Notes</b>	Notes describing what work is being performed.
<b>Contact</b>	Customer contact name.
<b>Phone</b>	Customer phone number.
<b>Street</b>	Customer address.
<b>City</b>	City location of the customer.
<b>Customer</b>	Customer company name.



# Navigating the quotes tab

The QUOTES TAB contains your specific order ID, dates, quote status and any relevant notes. Information will populate under multiple headings. The Quotes Tool Bar is interactive. All search criteria can be sorted so you can easily and efficiently find your quote. By clicking on Order ID, Date, Notes or Status, you can sort based on the fields, dates or status.

1

LOCATIONCOMPANY ABC (H.Q.)

COMPANY ABC

DATE FROMJan 01, 2020

2Feb 11, 2021

3REFRESH

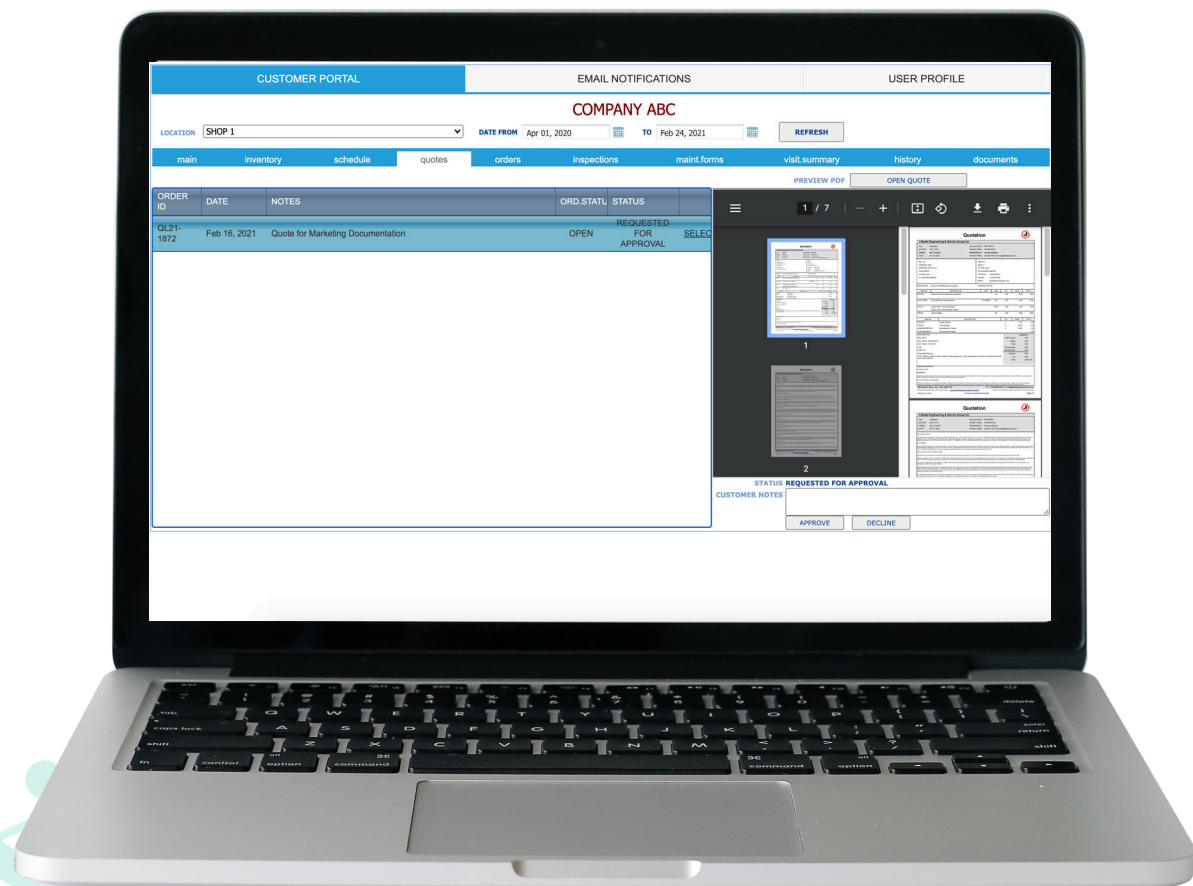
- 1 Select the correct location
- 2 Select the date range
- 3 Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your quote history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.



## How do I read the data?

ORDER ID	DATE	NOTES	ORD.STATU	STATUS
----------	------	-------	-----------	--------

Once you have refined your search your quotes data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders are easy and efficient. To verify if a heading is interactive you can simply scroll over the heading, and a message will appear saying “click here to sort”.

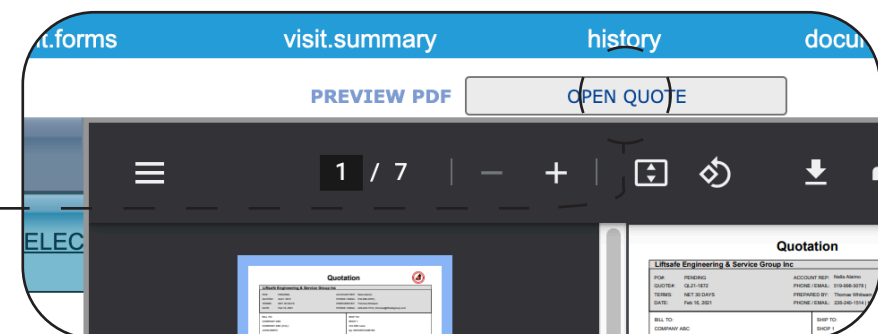
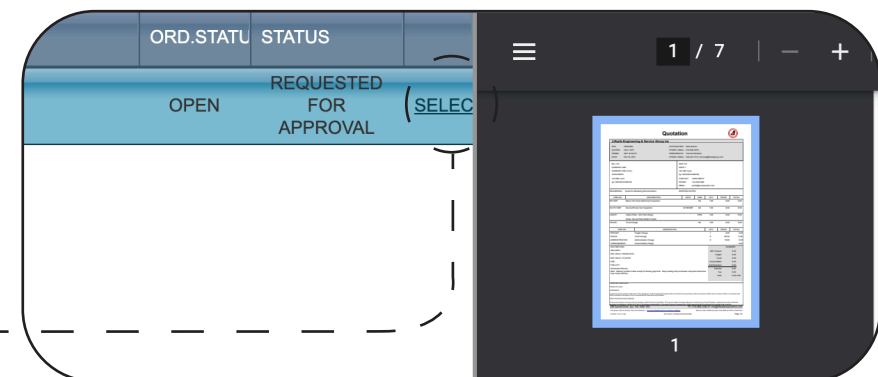
### Tool Bar Includes

<b>Order ID *</b>	Quote number generated by Liftsafe.
<b>Date</b>	The date the quote is created.
<b>Notes</b>	A description of the work being performed.
<b>Ord. Status</b>	Fulfillment status of the order.
<b>Status</b>	Order approval or decline status.

## How do I generate a pdf?

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

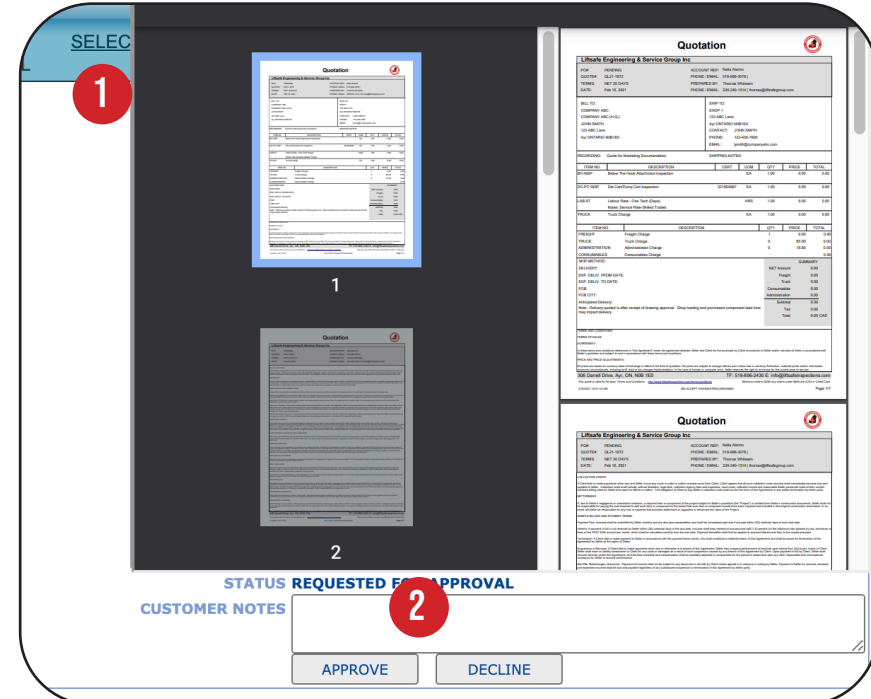
- 1 Click on ‘select’ found on the far right column of any quote. A preview of the quote will generate.
- 2 Click the open quote button above the preview menu to generate the pdf in a new window. This PDF will detail the work needed and the cost associated.



## How do I approve/decline a quote?

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

- 1 Click on 'select' found on the far right column of any quote. A preview of the quote will generate.
- 2 Two buttons, approve and decline can be found at the bottom of the quotes tab. Select approve or decline.
- 3 Upon clicking the approve button an email will be generated to begin scheduling.
- 4 Your request will be confirmed by one of our reps. If you encounter any issues contact us at 1-866-496-6600.

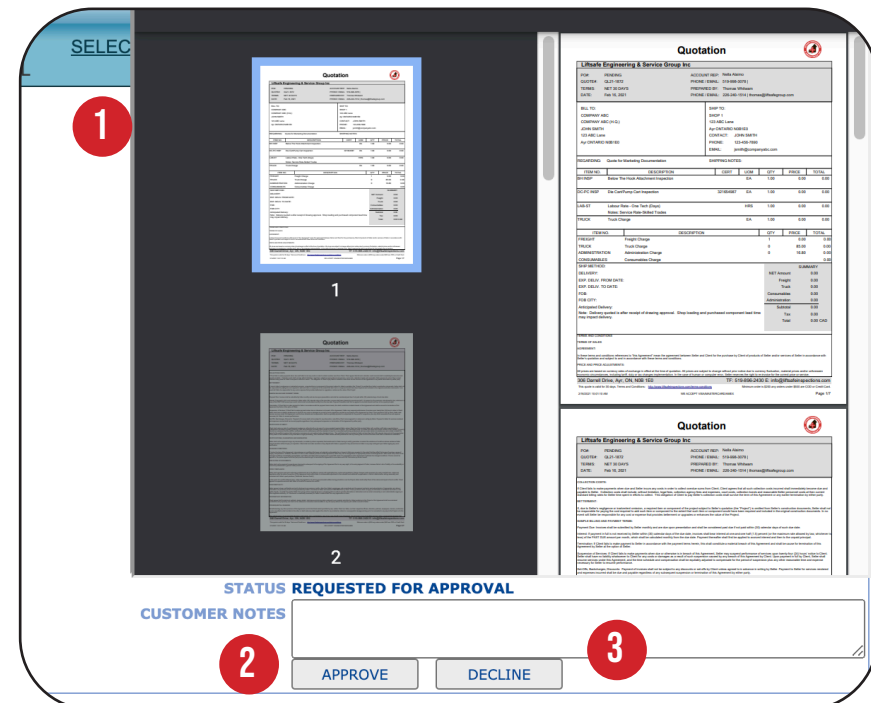


The screenshot shows a web interface for managing quotes. On the left, a list of quotes is displayed with a 'SELECT' button highlighted in the top right corner of the first quote. On the right, a detailed view of a quote is shown, including a table of services and their costs. At the bottom of the interface, there is a 'STATUS REQUESTED FOR APPROVAL' section with a 'CUSTOMER NOTES' text area and two buttons: 'APPROVE' and 'DECLINE'.

## How do I make comments?

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

- 1 Click on 'select' found on the far right column of any quote. A preview of the quote will generate.
- 2 At the bottom of the quotes tab you will see a customer notes section. Here you can make any comments or document any questions for us to review.
- 3 Upon clicking the approve button comments will be sent to a representative.



This screenshot is identical to the one above, showing the quote management interface. It highlights the 'CUSTOMER NOTES' text area at the bottom of the interface, which is used for adding comments or questions before approving a quote.

# Navigating the orders tab

The ORDERS TAB is similar to the QUOTES TAB and contains all of your sales orders. You will see a unique order ID and can reference based on date. Here you will be able to view a detailed breakdown of the work performed and any associated costs.

1

LOCATION

COMPANY ABC (H.Q.)

DATE FROM

Jan 01, 2020

2

Feb 11, 2021

3

REFRESH

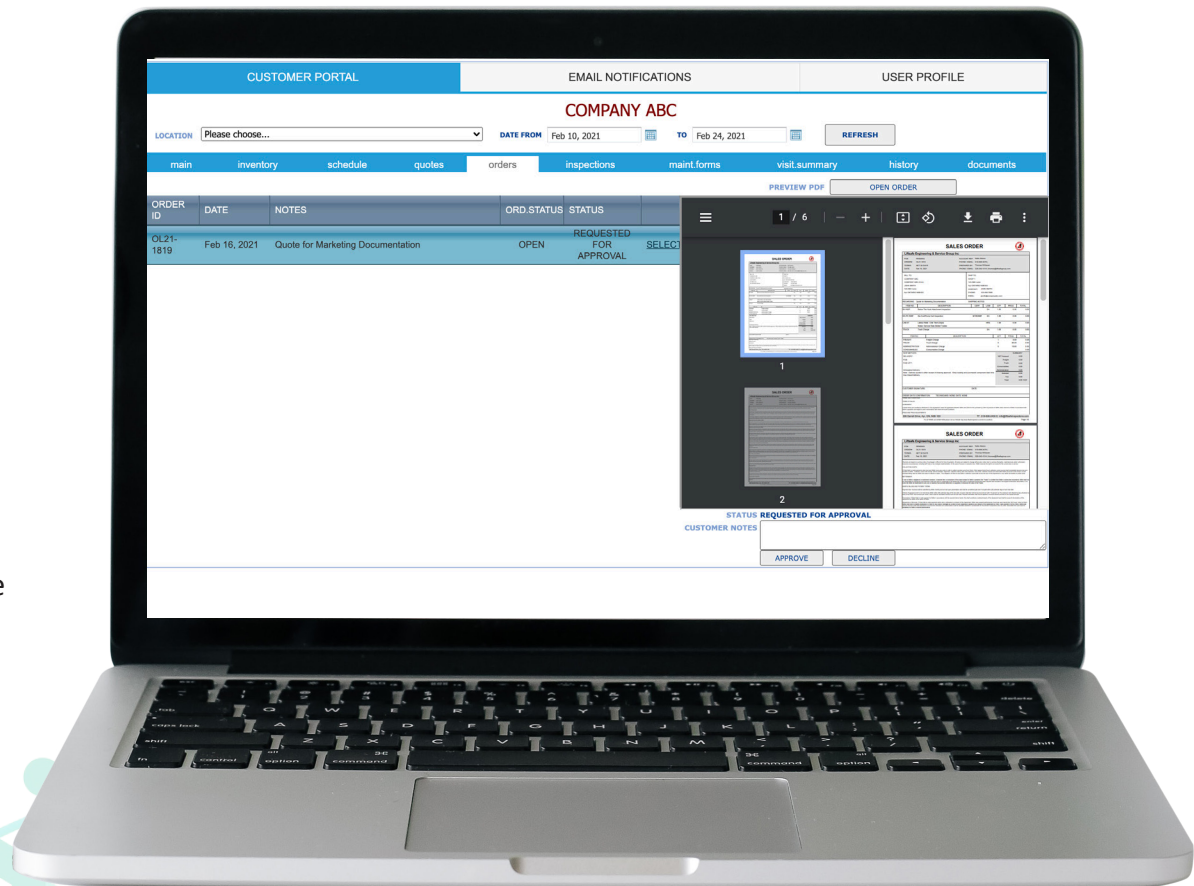
- 1 Select the correct location
- 2 Select the date range
- 3 Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

ORDER ID	DATE	NOTES	ORD.STATU	STATUS
----------	------	-------	-----------	--------

Once you have refined your search your orders data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders is easy and efficient. To verify if a heading is interactive you can simply scroll over the heading, if interactive, a message will appear saying “click here to sort”.

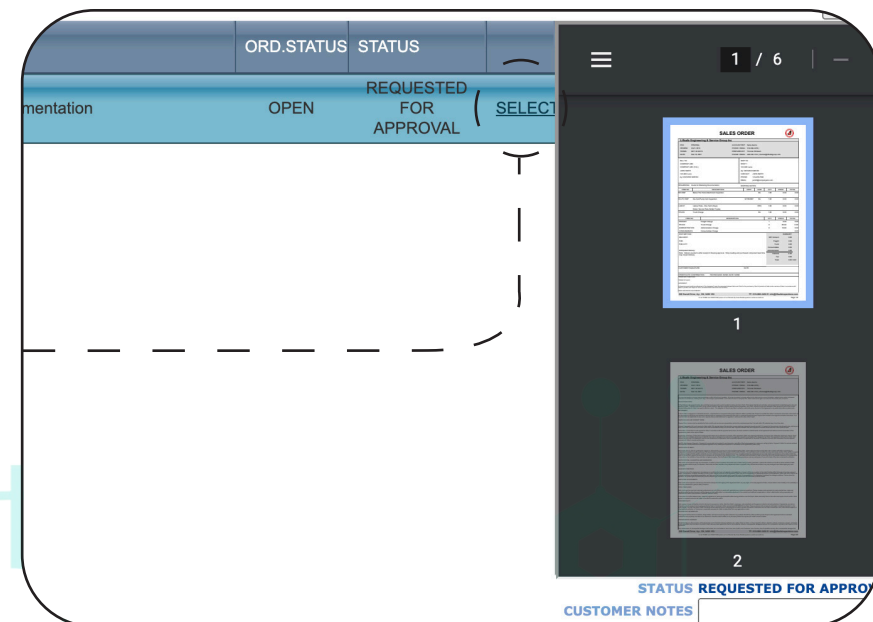
### Tool Bar Includes

<b>Order ID *</b>	Quote number generated by Liftsafe.
<b>Date</b>	The date the quote is created.
<b>Notes</b>	A description of the work being performed.
<b>Ord. Status</b>	Fulfillment status of the order.
<b>Status</b>	Order approval or decline status.

## How do I select an order?

Select location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

- 1 By clicking select, your sales order will be generated in a PDF preview, which can be printed or saved based on your needs.

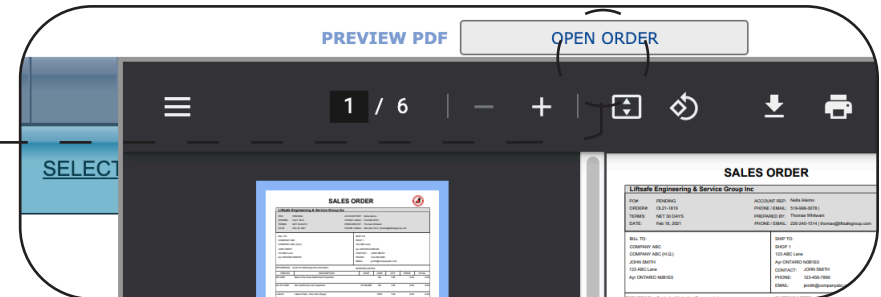
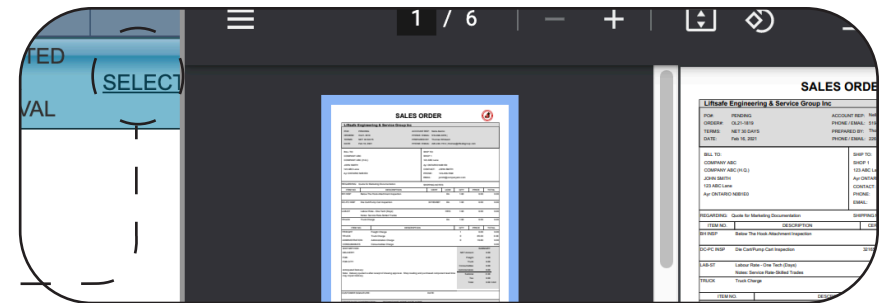




## How do I generate a pdf?

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

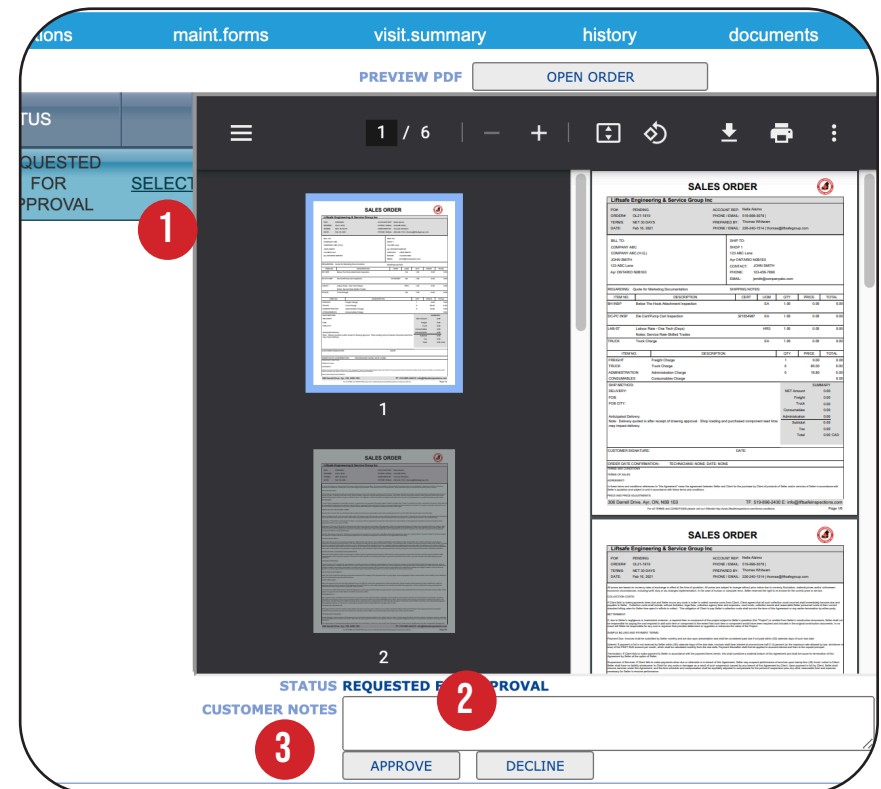
- 1 Click on 'select' found on the far right column of any order. A preview of the quote will generate.
- 2 Click the open order button above the preview menu to generate the pdf in a new window. This PDF will detail the work needed and the cost associated.



## How do I approve/decline/edit an order?

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

- 1 Click on 'select' found on the far right column of any order. A preview of the order will generate.
- 2 Two buttons, approve and decline can be found at the bottom of the order tab. Once you are ready to approve your order, simply click approve and the status will update accordingly.
- 3 To edit your order you will see a customer notes section at the bottom of the PDF preview. Here you can make any comments or document any questions for us to review before the quote is approved. You must select approve or decline to send edits.
- 4 Your request will be confirmed by one of our reps. If you encounter any issues contact us at 1-866-496-6600.



# Navigating the inspections tab

Access a complete list of your inspections to make verification of your safety practices simple and efficient. The INSPECTIONS TAB contains a variety of detailed information pertaining to inspected equipment. This tab allows you to view, organize and print all of your inspection data.

1

LOCATION

COMPANY ABC (H.Q.)

COMPANY ABC

DATE FROM

Jan 01, 2020

2

Feb 11, 2021

3

REFRESH

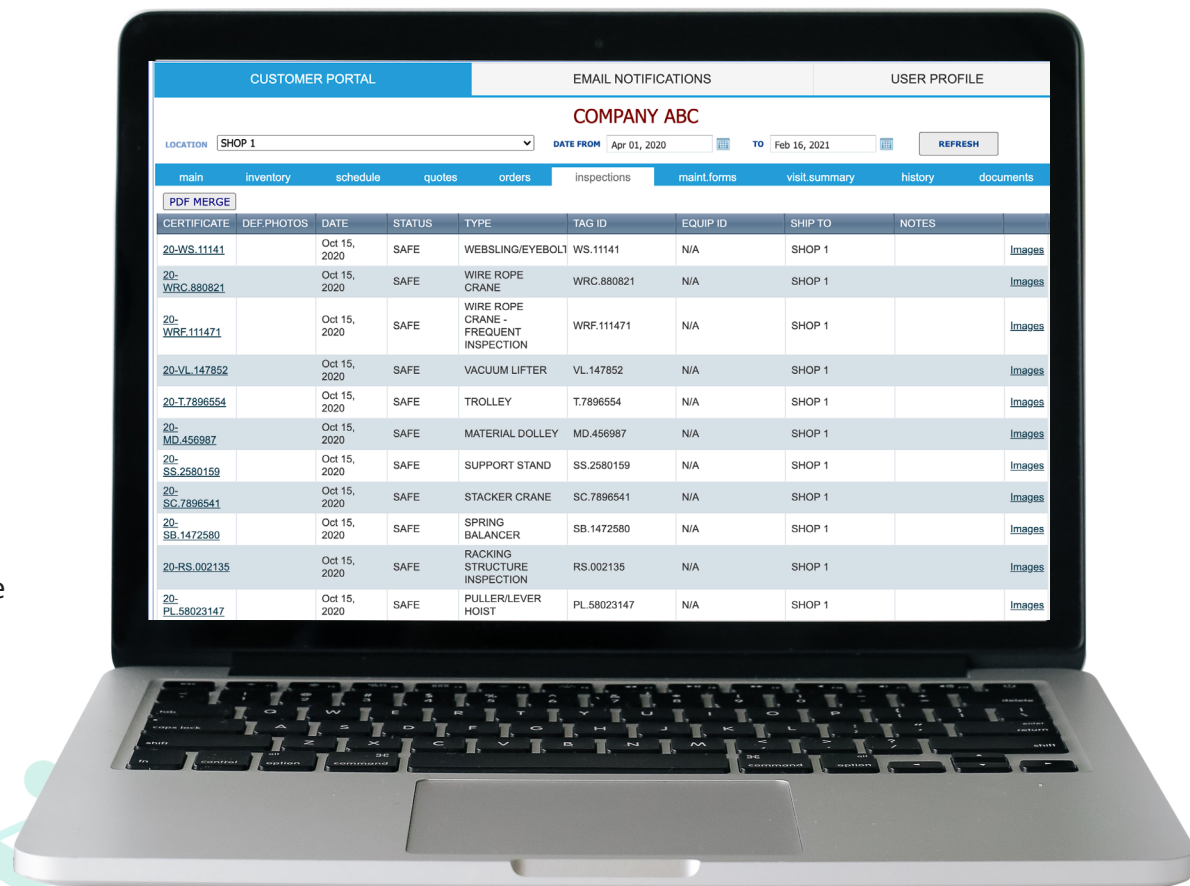
- 1 Select the correct location
- 2 Select the date range
- 3 Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

CERTIFICATE	DEF.PHOTOS	DATE	STATUS	TYPE	TAG ID	EQUIP ID	SHIP TO	NOTES
<a href="#">20-WS.11141</a>		Oct 15, 2020	SAFE	WEBSLII	WS.1114	N/A	SHOP 1	
<a href="#">20-WRC.880821</a>		Oct 15, 2020	SAFE	WIRE ROPE CRANE	WRC.880	N/A	SHOP 1	
<a href="#">20-WRF.111471</a>		Oct 15, 2020	SAFE	WIRE ROPE CRANE - FREQUE INSPEC	WRF.111	N/A	SHOP 1	
<a href="#">20-VL.147852</a>		Oct 15, 2020	SAFE	VACUUM LIFTER	VL.14785	N/A	SHOP 1	
<a href="#">20-T.7896554</a>		Oct 15, 2020	SAFE	TROLLE	T.789655	N/A	SHOP 1	
<a href="#">20-MD.456987</a>		Oct 15, 2020	SAFE	MATERI/ DOLLEY	MD.4569	N/A	SHOP 1	
<a href="#">20-SS.2580159</a>		Oct 15, 2020	SAFE	SUPPOR STAND	SS.2580	N/A	SHOP 1	
<a href="#">20-SC.7896541</a>		Oct 15, 2020	SAFE	STACKE CRANE	SC.7896	N/A	SHOP 1	
<a href="#">20-SB.1472580</a>		Oct 15, 2020	SAFE	SPRING BALANC	SB.1472	N/A	SHOP 1	
<a href="#">20-RS.002135</a>		Oct 15, 2020	SAFE	RACKIN( STRUCT	RS.0021	N/A	SHOP 1	

The inspections tool bar is interactive, all search criteria can be sorted to ensure finding your inspections is easy and efficient. For example, clicking the status heading will enable you to sort by various statuses such as safe or not safe. Please note it is possible to sort based on multiple criteria such as type and status.

### Tool bar includes:

- 1. Certificate:** All certificates pertaining to your inspection can be found under the certificate heading. Clicking on any of the specific certificates will generate a PDF that can be printed or saved. All inspection points are documented and contain comments and appropriate statuses based on the inspection performed.
- 2. Def Photos:** Should there be any deficiencies with any of your inspection items, a detailed list with photos will be found here. Once you click on any of the listed deficiencies a PDF will generate which can be saved or printed.
- 3. Date:** The date of your inspection can be found here and can be used to sort your data by date.
- 4. Status:** This column allows you to quickly view the status of your items that were inspected. By sorting this you can quickly see which of your equipment requires action or which of your items are safe.
- 5. Type:** This column provides you with the ability to filter based on equipment type. For example, if you are looking to view all basketball inspections, click the heading to filter.
- 6. Tag id:** The tag id is our internal records number to keep track of maintenance performed.
- 7. Equip id:** The equipment id is the clients external reference number for equipment (if provided) to allow for easy search and tracking.
- 8. Ship to:** Location the equipment is sent to for maintenance or repairs.
- 9. Notes:** Notes made by our technicians when inspecting equipment.





## Accessing your certificates

Be sure to select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

- 1 Click on the certificate number found on the far left column. A pop-up with a link to the certificate will generate.




## Understanding your certificate

Each certificate has a uniform layout.




- 1 At the top you will find the certificate number, equipment ID, and the sales order number.
- 2 You will then see all of the relevant data we have for that particular item including location, size, material, and more.
- 3 In the middle of the page, you will see the various inspection points we look at when we inspect your equipment. Some inspection points don't always apply to a given item. Having this breakdown allows you to see what areas of the item passed / failed with either a check mark or X in the status column.
- 4 There is also an additional column where technicians can put comments and a hazard class which are defined at the bottom of the certificate.
- 5 Above the hazard class icon legend, an overall item status will be displayed indicating if the item is "Safe" or "Not Safe." This section will include an image of the item inspected and the name of the technician who inspected the equipment, in the event you have additional questions.

### SAFETY INSPECTION CERTIFICATE





<b>Liftsafe Engineering &amp; Service Group Inc</b>			
Certificate:	20-WRC.880821	Customer:	COMPANY ABC
Equipment Id:	N/A	Location:	SHOP 1
Sales Order:	OL20-5113	Address:	123 ABC Lane Ayr ONTARIO N0B1E0
CONTACT: JOHN SMITH		PHONE: 123-456-7890	EMAIL: jsmith@companyabc.com


<b>DATA: WIRE ROPE CRANE</b>			
CUSTOMER ID NO.	ABC1112	SPECIFIC LOCATION	LSI SHOP
MAKE	KONE	MODEL	GXT-14
SERIAL NO.	11101	CAPACITY	40 TON
TYPE	MONORAIL	VOLTAGE	460V
CONTROL VOLTAGE	220V	CRANE CLASSIFICATION	CLASS D (HEAVY SERVICE)
HOIST SPEED	16FPM	LIFT/FALL	4:1
ROPES	1/4"	PENDANT DATA	SIEMENS
PENDANT BUTTONS	6+E-STOP	HOOK THROAT	N/A
HOOK LOAD POINT	N/A	TROLLEY MAKE	KONE
TROLLEY MOTOR MODEL	KONE	TROLLEY MOTOR SERIAL	0000141
BRIDGE MAKE	KONE	BRIDGE ID NO.	11-K1
BRIDGE DRIVE MOTOR MAKE	KONE	BRIDGE DRIVE MOTOR MODEL	DUAL
BRIDGE DRIVE MOTOR SERIAL	012	END TRUCK MAKE	KONE
END TRUCK MODEL	KONE-112	END TRUCK SERIAL	000012
SPAN	40'	FESTOON	BUS BAR
CRANE BEAM SIZE (WEBXFLANGE)	N/A	RECOMMENDED PM FREQUENCY	SEMI-ANNUALLY
ACCESS REQUIREMENTS	SCISSOR LIFT		


<b>INSPECTION POINTS</b>			
Inspection Point	Status	Repairs	Comments
<div><div><div><b>Status: SAFE</b></div></div><div></div></div>			
Technician: Thomas Whitwam		Signature: 	Date: Oct 15, 2020

HAZARD CLASS ICON LEGEND:

 REMOVE FROM SERVICE, DO NOT USE UNTIL REPAIRED

 MONITOR - SCHEDULE MAINTENANCE AT NEXT POSSIBLE INTERVAL

 CAUTION - RECOMMEND IMMEDIATE REPAIRS

 OK - MONITOR

All lifting devices which contain the **SAFE FOR USE** or **CERTIFIED** ICON have been thoroughly examined by a competent person to determine its capability of handling the maximum load as rated, as required by the OHSA Reg. 851-51(1)(b)

This inspection is valid for work which was specifically requested at time of inspection only. All certificates are a result of work performed in conformance with applicable specifications and standards to the best of our ability and intent. However, Liftsafe Engineering & Service Group Inc will not be responsible for deviations within the normal limits of accuracy, nor will it be held responsible for issues arising from incorrect operation or use of equipment in accordance with standard practices. Liftsafe Engineering & Service Group Inc, its owners, affiliates and employees will not be held liable for any failure, downtime, or injury as a result of this inspection report or work performed on this equipment.

306 Darrell Drive, Ayr, ON, N0B 1E0

TF: 519-896-2430 E: info@liftsafeinspections.com

For all TERMS and CONDITIONS please visit our Website <http://www.liftsafeinspections.com/terms-conditions>

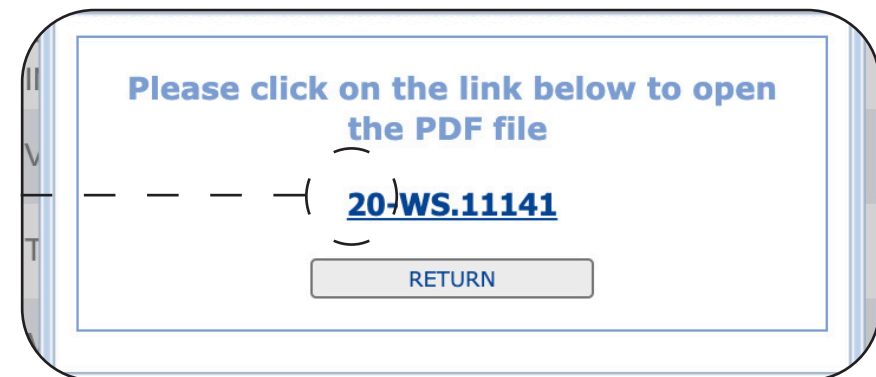
Page 1/1

## How do I generate a pdf?

Follow these steps to generate a pdf of your inspection certificate, which can be saved or printed if you require. Be sure to select location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

- 1 Click on any of the work order numbers to the left. A pop-up will open.
- 2 Click the document link in the center of the pop-up and the pdf will generate in a new window. This PDF will detail the work that has been completed, the status of the work and the time it took to complete the repairs.

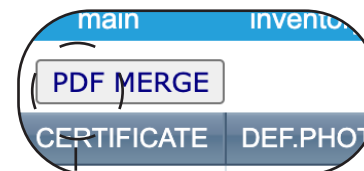
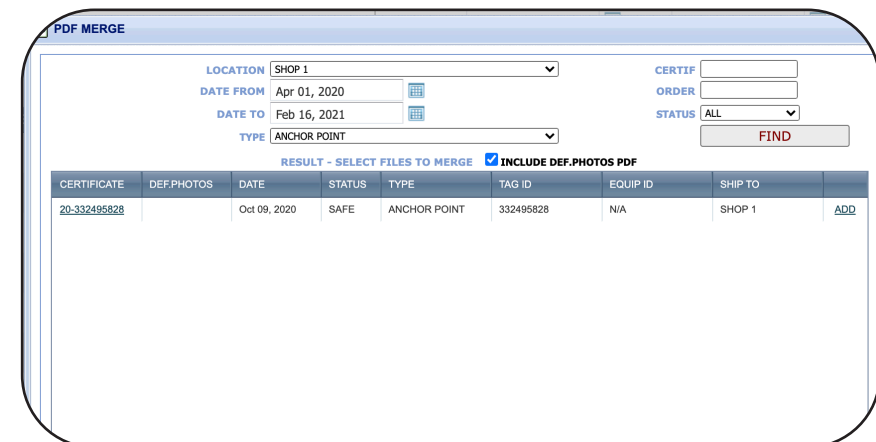
<a href="#">20-WS.11141</a>	Oct 15, 2020
<a href="#">20-WRC.880821</a>	Oct 15, 2020
<a href="#">20-WRF.111471</a>	Oct 15, 2020



## How do I merge a pdf?

PDF MERGE allows you to combine all or some of your certificates into one PDF document. Be sure to select location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

- 1 Click on the PDF MERGE button in the top left corner
- 2 Set location, date and type, then click find.
- 3 Click add on the certificates you would like to add into the PDF.
- 4 When finished adding all the certificates, hit PDF MERGE. This will open a new document which you can save or print.

PDF MERGE

LOCATION: SHOP 1  
DATE FROM: Apr 01, 2020  
DATE TO: Feb 16, 2021  
TYPE: ANCHOR POINT

CERTIF:   
ORDER:   
STATUS: ALL

FIND

RESULT - SELECT FILES TO MERGE ☒ INCLUDE DEF.PHOTOS PDF

CERTIFICATE	DEF.PHOTOS	DATE	STATUS	TYPE	TAG ID	EQUIP ID	SHIP TO	
<a href="#">20-332495828</a>		Oct 09, 2020	SAFE	ANCHOR POINT	332495828	N/A	SHOP 1	<a href="#">ADD</a>

# Navigating the maintenance tab

The MAINTENANCE TAB houses all relevant maintenance records for any particular piece of equipment. Keep track of your crucial paper work, such as previous maintenance records to ensure everything you need is conveniently located in one place. All of these documents can be accessed on demand and can be printed or saved based on your needs.

1

LOCATION

COMPANY ABC (H.Q.)

DATE FROM

Jan 01, 2020

2

Feb 11, 2021

3

REFRESH

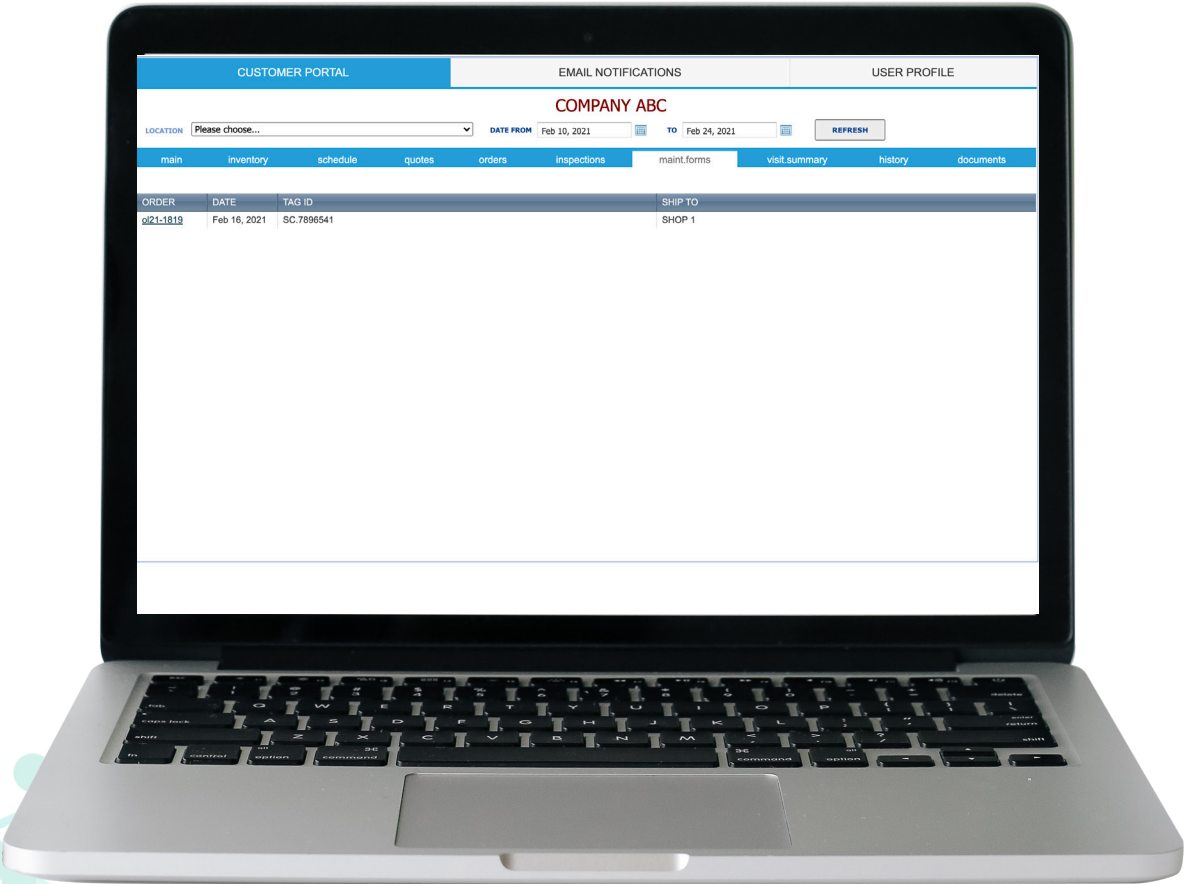
- 1 Select the correct location
- 2 Select the date range
- 3 Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.



## How do I read the data?

main	inventory	schedule	quotes	orders	inspections	maint.forms	visit.summary
ORDER	DATE	TAG ID	SHIP TO				

Once you have refined your search your maintenance data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders is easy and efficient. To verify if a heading is interactive you can simply scroll over the heading, if interactive a message will appear saying “click here to sort”.

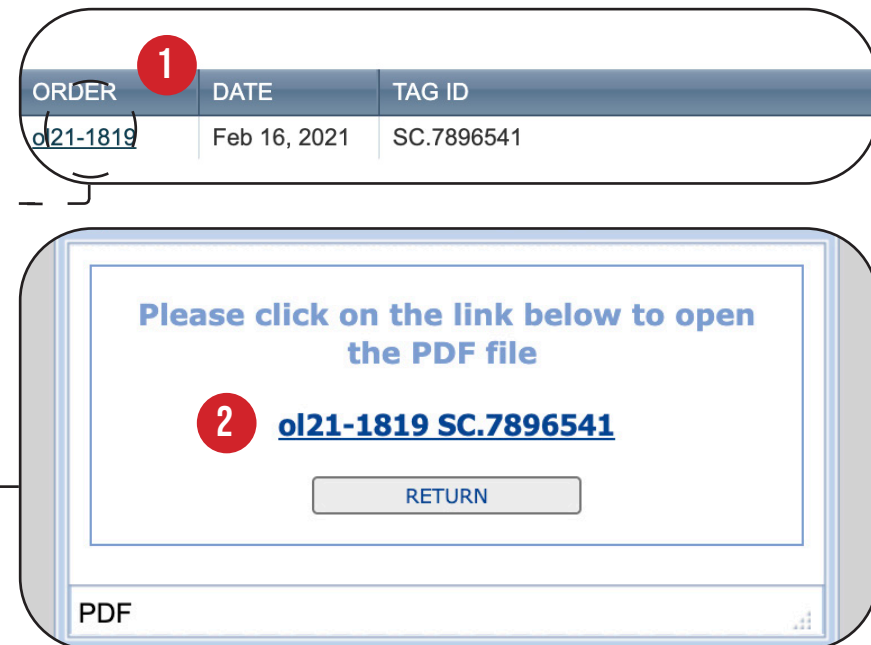
### Tool Bar Includes

Order ID *	Assigned order number from the Liftsafe system.
Date	Scheduled date of repair.
TAG ID	Liftsafe certificate number.
Ship to	Customer company name.

## How do I review my work order?

Select location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

- 1 Clicking on any of the work order numbers to the left will open a document pop-up.
- 2 This pop-up will include a link to generate a PDF in a separate tab.
- 3 This PDF will detail the work that has been completed, the status of the work and the time it took to complete the repairs. This PDF can remain saved here, or printed for your convenience.



ORDER	DATE	TAG ID
<a href="#">o21-1819</a>	Feb 16, 2021	SC.7896541

Please click on the link below to open the PDF file

2 [o21-1819 SC.7896541](#)

RETURN

PDF



# Navigating the visit summary tab

The SITE VISIT SUMMARY TAB allows you to get a detailed report of the work performed on any given work order. Your Customer Portal Account will populate the SITE VISIT SUMMARY screen, where you will be able to see a synopsis of the work that was performed at a specific location. Here you will be able to review the work, account for unsafe equipment and gather all pertinent information to proceed with repairs.

1

LOCATIONCOMPANY ABC (H.Q.)

COMPANY ABC

DATE FROMJan 01, 2020

2Feb 11, 2021

3REFRESH

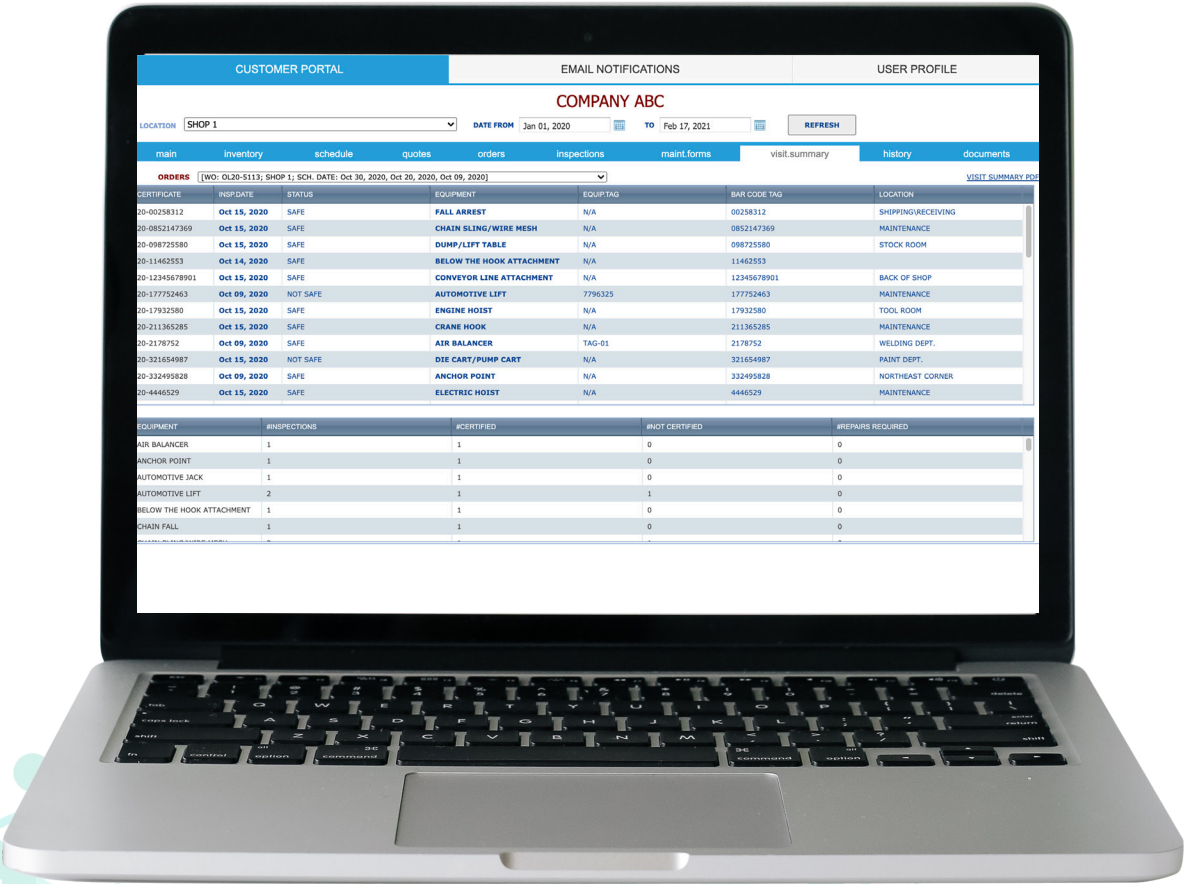
- 1Select the correct location
- 2Select the date range
- 3Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

CERTIFICATE	INSP.DATE	STATUS	EQUIPMENT	EQUIP.TAG	BAR CODE TAG	LOCATION
20-00258312	Oct 15, 2020	SAFE	FALL ARREST	N/A	00258312	SHIPPING/RECEIVING
0852147369	Oct 15, 2020	SAFE	CHAIN SLING/WIRE MESH	N/A	0852147369	MAINTENANCE

Information will populate under multiple headings. The tool bar is interactive, all search criteria can be sorted to ensure finding your information is easy and efficient. To verify if a heading is interactive you can simply scroll over the heading, if interactive, a message will appear saying “click here to sort”.

### Tool Bar includes:

<b>Certificate</b>	Internal Liftsafe certificate number.
<b>Insp. Date</b>	Date of inspection for each piece of equipment.
<b>Status</b>	Status of equipment determined by technicians, i.e. safe or unsafe.
<b>Equipment</b>	Type of equipment that has been inspected or repaired.
<b>Equip. Tag</b>	External client code for internal classification and OEM linkage.
<b>Bar Code Tag</b>	Internal Liftsafe certificate number, minus the year.
<b>Location</b>	Location of equipment within the facility.

EQUIPMENT	#INSPECTIONS	#CERTIFIED	#NOT CERTIFIED	#REPAIRS REQUIRED
AIR BALANCER	1	1	0	0
ANCHOR POINT	1	1	0	0
AUTOMOTIVE JACK	1	1	0	0

<b>Equipment</b>	Type of equipment that has been inspected or repaired.
<b>Inspections</b>	The number of inspections performed for each piece of equipment.
<b>Certified</b>	Number of inspections passed for each piece of equipment.
<b>Not certified</b>	Number of inspections not passed for each piece of equipment.
<b>Repairs required</b>	Number of repairs required for not passed pieces of equipment.



## How do I find my site visit summary?

Select location, date and click refresh (remember you must always press refresh when you are adjusting date ranges and locations).

1

Select the work order from the orders field.

2

Your customer portal account will populate the site visit summary screen, where you will be able to get a synopsis of the work that was performed at a specific location. Here you will be able to review the work, account for the unsafe equipment and gather all the pertinent information to proceed with the repairs.

CERTIFICATE	INSP DATE	STATUS	EQUIPMENT	EQUIP TI
20-00258312	Oct 15, 2020	SAFE	FALL ARREST	N/A
20-0852147369	Oct 15, 2020	SAFE	CHAIN SLING/WIRE MESH	N/A
20-098725580	Oct 15, 2020	SAFE	DUMP/LIFT TABLE	N/A
20-11462553	Oct 14, 2020	SAFE	BELOW THE HOOK ATTACHMENT	N/A
20-12345678901	Oct 15, 2020	SAFE	CONVEYOR LINE ATTACHMENT	N/A
20-177752463	Oct 09, 2020	NOT SAFE	AUTOMOTIVE LIFT	7796325
20-17932580	Oct 15, 2020	SAFE	ENGINE HOIST	N/A
20-211365285	Oct 15, 2020	SAFE	CRANE HOOK	N/A
20-2178752	Oct 09, 2020	SAFE	AIR BALANCER	TAG-01
20-321654987	Oct 15, 2020	NOT SAFE	DIE CART/PUMP CART	N/A
20-332495828	Oct 09, 2020	SAFE	ANCHOR POINT	N/A
20-4446529	Oct 15, 2020	SAFE	ELECTRIC HOIST	N/A

EQUIPMENT	#INSPECTIONS	#CERTIFIED	#
AIR BALANCER	1	1	0
ANCHOR POINT	1	1	0
AUTOMOTIVE JACK	1	1	0
AUTOMOTIVE LIFT	2	1	
BELOW THE HOOK ATTACHMENT	1	1	



## How to save and print a visit summary page?

As is standard with our software, we have enabled a feature that allows you to save or print a visit summary PDF from within the system.

1

Select the visit summary PDF link from the top right corner.

2

A PDF will generate in a separate link detailing a full summary of your site visits.

3

From here you can download and save or print this PDF file.

BAR CODE TAG	LOCATION
00258312	SHIPPING/RECEIVING
0852147369	MAINTENANCE

**VISIT SUMMARY**  
Sales Order: OL20-5113

**Customer Information:**

Ship To:  
COMPANY ABC  
JOHN SMITH

Ship To:  
SHOP 1  
123 ABC Lane  
APT ONE/ABC NORTH

**Inspections:**

Inspection	Status	Equipment Type	Equip. Date	Ins. Code	Ins. Tag	Equipment Tag	Notes/Location
20-00258312	SAFE	FALL ARREST	Oct 15, 2020	000010	N/A	SHIP/RECEIVING	
20-0852147369	SAFE	CHAIN SLING/WIRE MESH	Oct 15, 2020	080117089	N/A	MAINTENANCE	
20-098725580	SAFE	DUMP/LIFT TABLE	Oct 15, 2020	08030380	N/A	STOCK ROOM	
20-11462553	SAFE	BELOW THE HOOK ATTACHMENT	Oct 14, 2020	1146033	N/A		
20-12345678901	SAFE	CONVEYOR LINE ATTACHMENT	Oct 15, 2020	12345678901	N/A	BACK OF SHOP	
20-177752463	NOT SAFE	AUTOMOTIVE LIFT	Oct 09, 2020	17770483	1770030	MAINTENANCE	
20-17932580	SAFE	ENGINE HOIST	Oct 15, 2020	17930380	N/A	TOOL ROOM	
20-211365285	SAFE	CRANE HOOK	Oct 15, 2020	21130380	N/A	MAINTENANCE	
20-2178752	SAFE	AIR BALANCER	Oct 09, 2020	2178033	TAG-01	WELDING DEPT	
20-321654987	NOT SAFE	DIE CART/PUMP CART	Oct 15, 2020	32160487	N/A	PAINT DEPT	
20-332495828	SAFE	ANCHOR POINT	Oct 09, 2020	33049508	N/A	NORTHEAST CORNER	
20-4446529	SAFE	ELECTRIC HOIST	Oct 15, 2020	4446010	N/A	MAINTENANCE	
20-5478928	NOT SAFE	CHAIN SLING/WIRE MESH	Oct 15, 2020	5478015	N/A	LIB SHOP	
20-5874191	SAFE	CLEAN FALL	Oct 15, 2020	58010401	N/A	BATTERY AREA	

# Navigating the history tab

The HISTORY TAB is the section of the Customer Portal that gives you access to information about inspections and maintenance forms all within the same screen. In this tab you are able to filter by location as well as certificate number, order number, status or equipment type. This tab allows you to both sort and filter your content, ensuring all required documentation can be located with ease.

1

LOCATIONCOMPANY ABC (H.Q.)

DATE FROMJan 01, 2020

2Feb 11, 2021

3REFRESH

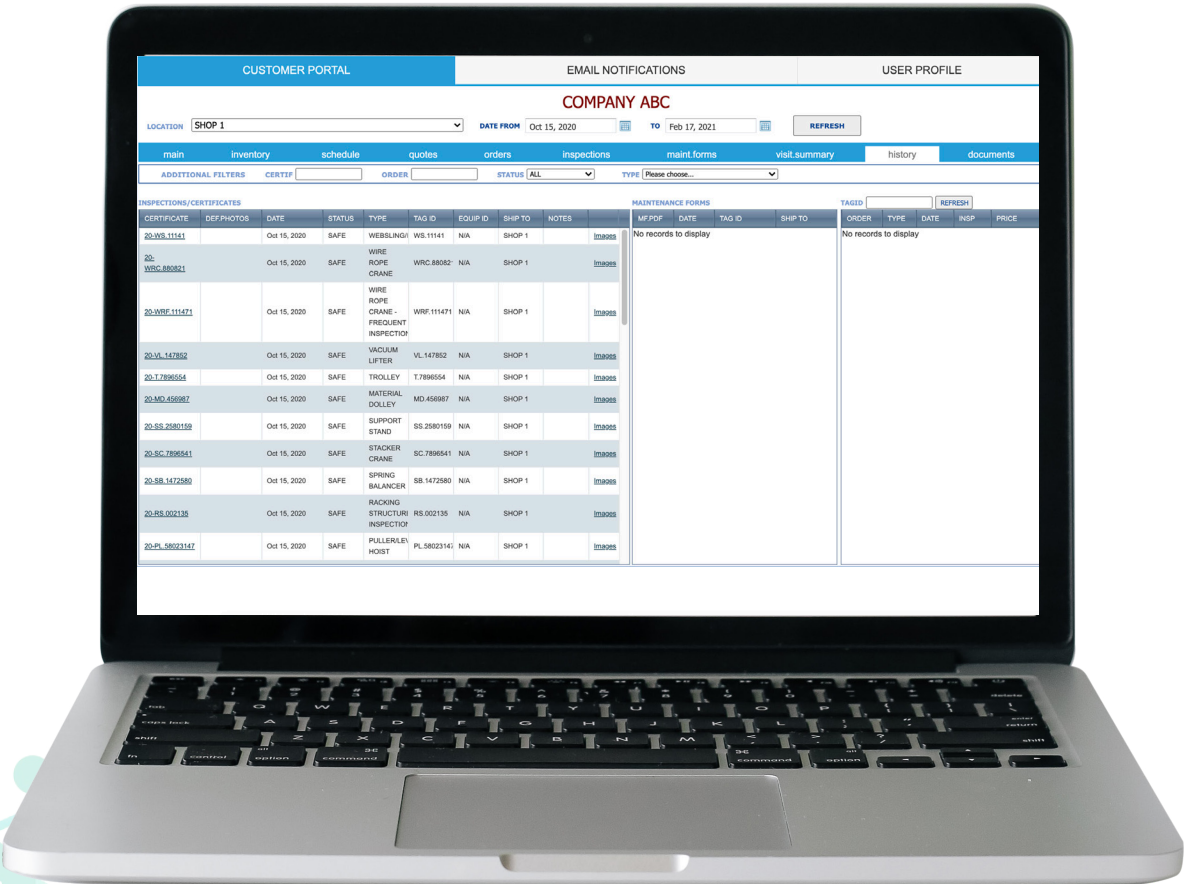
- 1Select the correct location
- 2Select the date range
- 3Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

Once you have refined your search your data history will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your orders are easy and efficient. To verify if a heading is interactive you can simply scroll over the heading, if interactive a message will appear identifying “click here to sort”.

INSPECTIONS/CERTIFICATES										MAINTENANCE FORMS				TAGID <input type="text"/> <input type="button" value="REFRESH"/>				
CERTIFICATE	DEF.PHOTOS	DATE	STATUS	TYPE	TAG ID	EQUIP ID	SHIP TO	NOTES		MF.PDF	DATE	TAG ID	SHIP TO	ORDER	TYPE	DATE	INSP	PRICE
<a href="#">20-WS.11141</a>		Oct 15, 2020	SAFE	WEBSLING/I	WS.11141	N/A	SHOP 1		<a href="#">Images</a>	No records to display				No records to display				

### Tool Bar Includes

<b>Certificate</b>	Internal Liftsafe certificate number.
<b>Def. Photos</b>	A deficiency photo generated to provide a visual representation of the failures as it pertains to the equipment. Internal Liftsafe certificate number and MOL standards included.
<b>Date</b>	Date of inspection.
<b>Status</b>	Status of equipment determined by technicians, i.e. safe or unsafe
<b>Type</b>	Type of equipment that has been inspected or repaired.
<b>Tag ID</b>	Internal Liftsafe certificate number, minus the year.
<b>Equip ID</b>	Number for the client's external use when tagging equipment.
<b>Ship To</b>	Department specific shipping details.
<b>Notes</b>	Internal client notes to Liftsafe.

### Maintenance forms

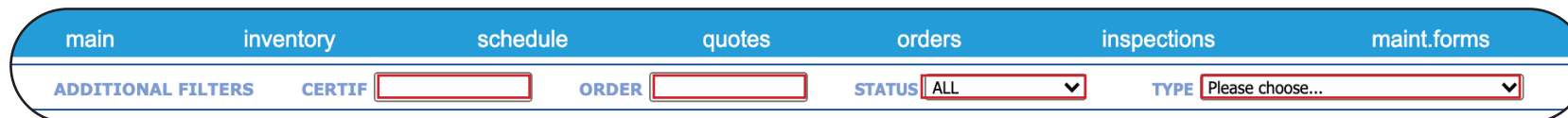
<b>MF.PF</b>	Maintenance Form PDF.
<b>Date</b>	Date the maintenance form was created.
<b>TAG ID</b>	Internal Liftsafe certificate number minus the year.
<b>Ship to</b>	Department specific shipping details.

### TAG ID

<b>Order</b>	Liftsafe internal work order number.
<b>Type</b>	Product or service offered relative to unsafe equipment.
<b>Date</b>	Date the order was created.
<b>Price</b>	Cost breakdown of services.



## How do I filter data?

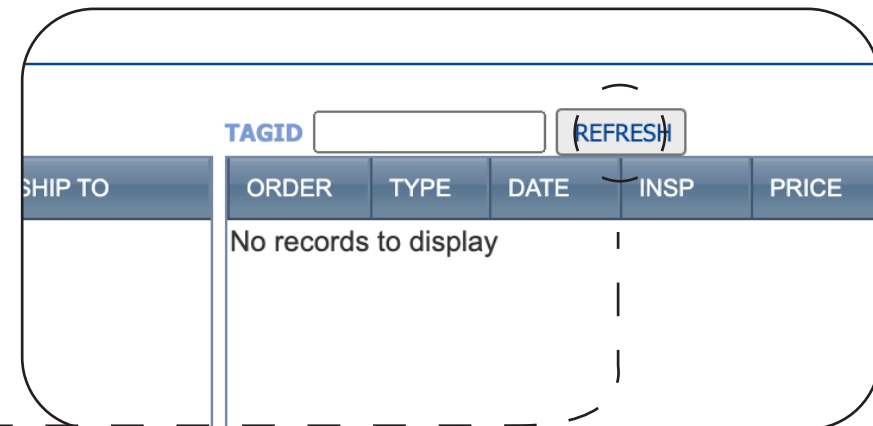


- 1 Search by, certificate, order, status or equipment type.
- 2 Always click refresh after changing any filter options.

## How do I search via Tag ID?

On the right hand side of the screen you will see the TAGID search field. You can search via corresponding Tag ID numbers by entering it in the field and clicking refresh. You will be able to view all associated costs with the relevant pieces of equipment.

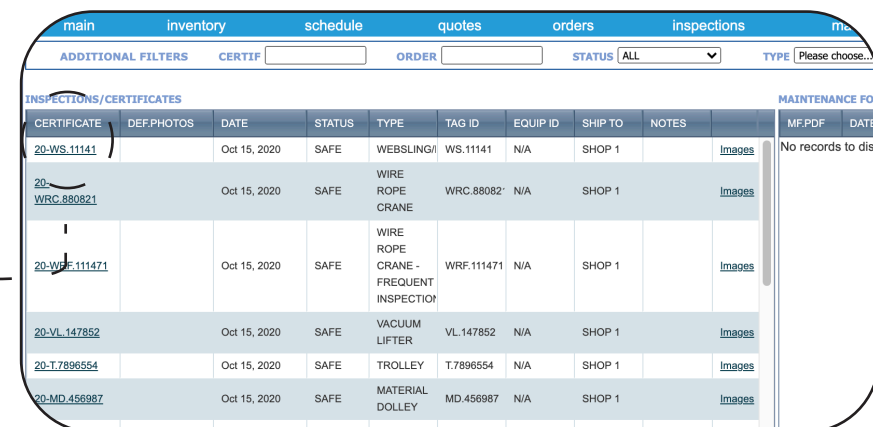
- 1 Click on any of the work order numbers to the left and a PDF will open in a new window.
- 2 This PDF will detail the work that has been completed, the status of the work and the time with which it took to complete the repairs. This PDF can remain saved here, or printed for your convenience.



## How do I manage pdfs?

Select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

- 1 Click on any of the work order numbers to the left and a PDF will open in a new window.
- 2 This PDF will detail the work that has been completed, the status of the work and the time with it took to complete the repairs. This PDF can remain saved here, or printed for your convenience.



CERTIFICATE	DEF.PHOTOS	DATE	STATUS	TYPE	TAG ID	EQUIP ID	SHIP TO	NOTES	Images
20-WS.11141		Oct 15, 2020	SAFE	WEBSLING	WS.11141	N/A	SHOP 1		<a href="#">Images</a>
20-WRC.88082		Oct 15, 2020	SAFE	WIRE ROPE CRANE	WRC.88082	N/A	SHOP 1		<a href="#">Images</a>
20-WRF.111471		Oct 15, 2020	SAFE	WIRE ROPE CRANE - FREQUENT INSPECTION	WRF.111471	N/A	SHOP 1		<a href="#">Images</a>
20-VL.147852		Oct 15, 2020	SAFE	VACUUM LIFTER	VL.147852	N/A	SHOP 1		<a href="#">Images</a>
20-T.7896554		Oct 15, 2020	SAFE	TROLLEY	T.7896554	N/A	SHOP 1		<a href="#">Images</a>
20-MD.456987		Oct 15, 2020	SAFE	MATERIAL DOLLEY	MD.456987	N/A	SHOP 1		<a href="#">Images</a>

# Navigating the documents tab

The DOCUMENTS TAB allows you to house all relevant documents for any particular piece of equipment. This tab will allow you to upload crucial paper work such as warranty information and user guides to ensure everything you need is conveniently located in one place. All of these documents can be accessed on demand and can be printed or saved based on your needs.

1

LOCATION

COMPANY ABC (H.Q.)

DATE FROM

Jan 01, 2020

2

Feb 11, 2021

3

REFRESH

1 Select the correct location

2 Select the date range

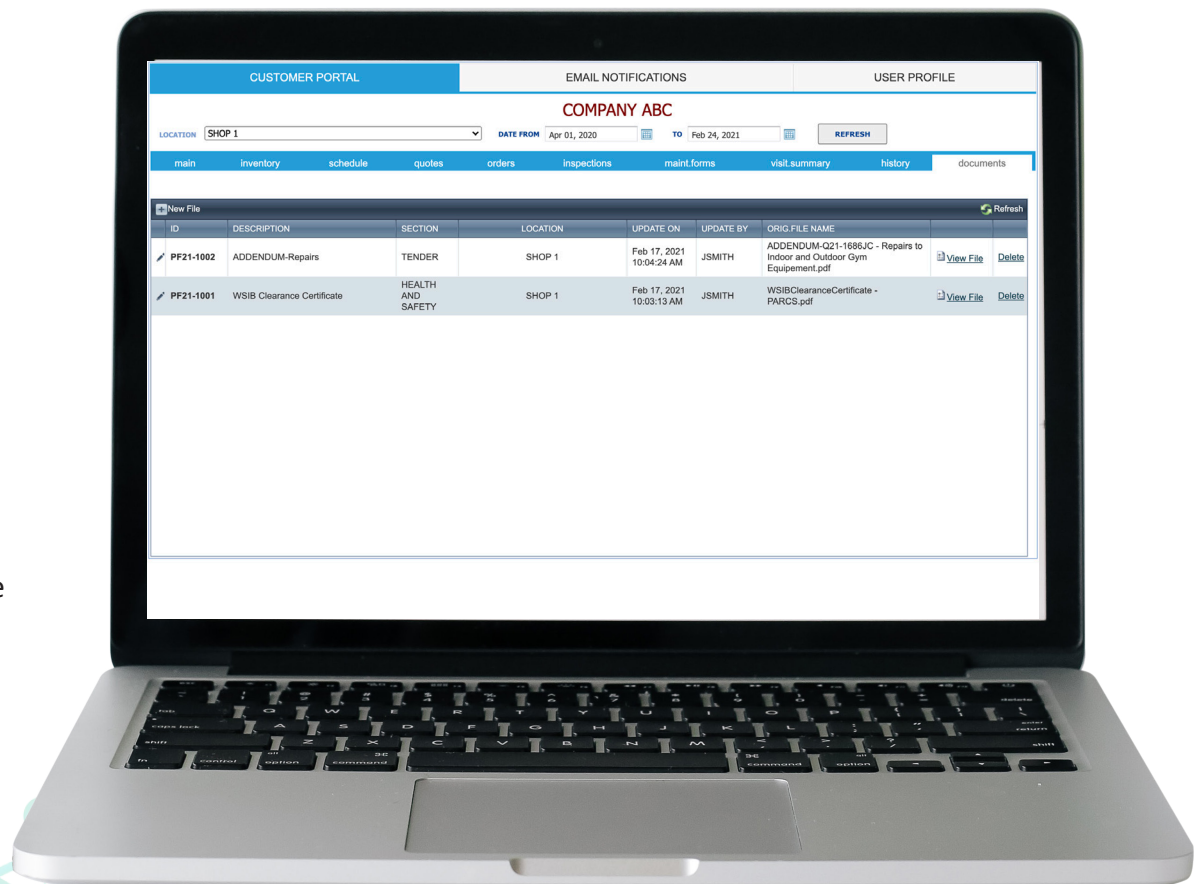
3 Select refresh

## Sorting Based on Location

The location drop-down menu allows you to access specific information on each location if applicable. To select one specific location, select the location from the drop-down menu and click.

## Sorting Based on Date

This field can be adjusted to backdate and receive further information on previous work. By clicking on the calendar, you will be able to check your history to ensure your date range of work is met. Once your date range is selected, press the refresh button to update.





## How do I read the data?

main
inventory
schedule
quotes
orders
inspections
maint.forms
visit.summary
history
documents

+ New File
Refresh

ID	DESCRIPTION	SECTION	LOCATION	UPDATE ON	UPDATE BY	ORIG.FILE NAME
----	-------------	---------	----------	-----------	-----------	----------------

Once you have refined your search, your documents data will display under the tool bar menu. The tool bar is interactive, all search criteria can be sorted to ensure finding your documents is easy and efficient.

### Tool Bar Includes

<b>ID</b>	Internal system generated ID number for uploaded documents.
<b>Description</b>	Description of the document itself.
<b>Section</b>	Catagory/department selected when uploaded.
<b>Location</b>	Department specific shipping details.
<b>Update on</b>	Date and time of document upload.
<b>Update by</b>	User name of the individual that uploaded file.
<b>Orig. File Name</b>	Original name of the uploaded document.



## How do I view my documents?

Select location, date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

1

To view any of your documents, simply click the “view file” link.

2

This will open up any documents you have saved in a new tab.

UPDATE BY	ORIG.FILE NAME		
SMITH	ADDENDUM-Q21-1686JC - Repairs to Indoor and Outdoor Gym Equipment.pdf	<a href="#">View File</a>	<a href="#">Delete</a>

**VISIT SUMMARY**  
Sales Order: OL20-5113

**Customer Information:**  

B/E To:  
COMPANY ABC  
JOHN SMITH

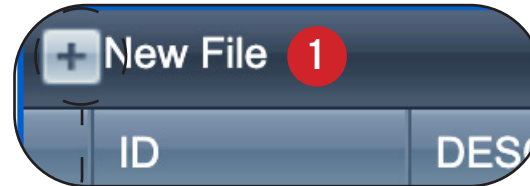
Ship To:  
SHOP 1  
123 ABC Lane  
Any ONTARIO N0B1E0

Certificate	Status	Equipment Type	Issp. Date	Bar Code Tag	Equipment Tag	Item Location
20-00258312	SAFE	FALL ARREST	Oct 15, 2020	00258312	N/A	SHIPPING/RECEIVING
20-085247369	SAFE	CHAIN SLING/WIRE MESH	Oct 15, 2020	085247369	N/A	MAINTENANCE
20-088725580	SAFE	DUMP/LIFT TABLE	Oct 15, 2020	088725580	N/A	STOCK ROOM
20-11462553	SAFE	BELOW THE HOOK ATTACHMENT	Oct 14, 2020	11462553	N/A	
20-12345678901	SAFE	CONVEYOR LINE ATTACHMENT	Oct 15, 2020	12345678901	N/A	BACK OF SHOP
20-17772463	NOT SAFE	AUTOMOTIVE LIFT	Oct 09, 2020	17772463	7796325	MAINTENANCE
20-17932580	SAFE	ENGINE HOIST	Oct 15, 2020	17932580	N/A	TOOL ROOM
20-211355265	SAFE	CRANE HOOK	Oct 15, 2020	211355265	N/A	MAINTENANCE

40

## How to upload a new file

- 1 Select the “New File” button to generate a pop-up window that can be populated with your document information.
- 2 Update your location, file path (upload file), description and category. You must select the file from your computer and upload the content.
- 3 Be sure to save after the upload.
- 4 Click the refresh button in the top right corner to view updated chart data.



FILE UPLOAD

LOCATION: SHOP 1

FILE PATH: [Select] [UPLOAD]

UPLOADED FILE: [Text Field]

DESCRIPTION: [Text Field]

CATEGORY: Please choose...

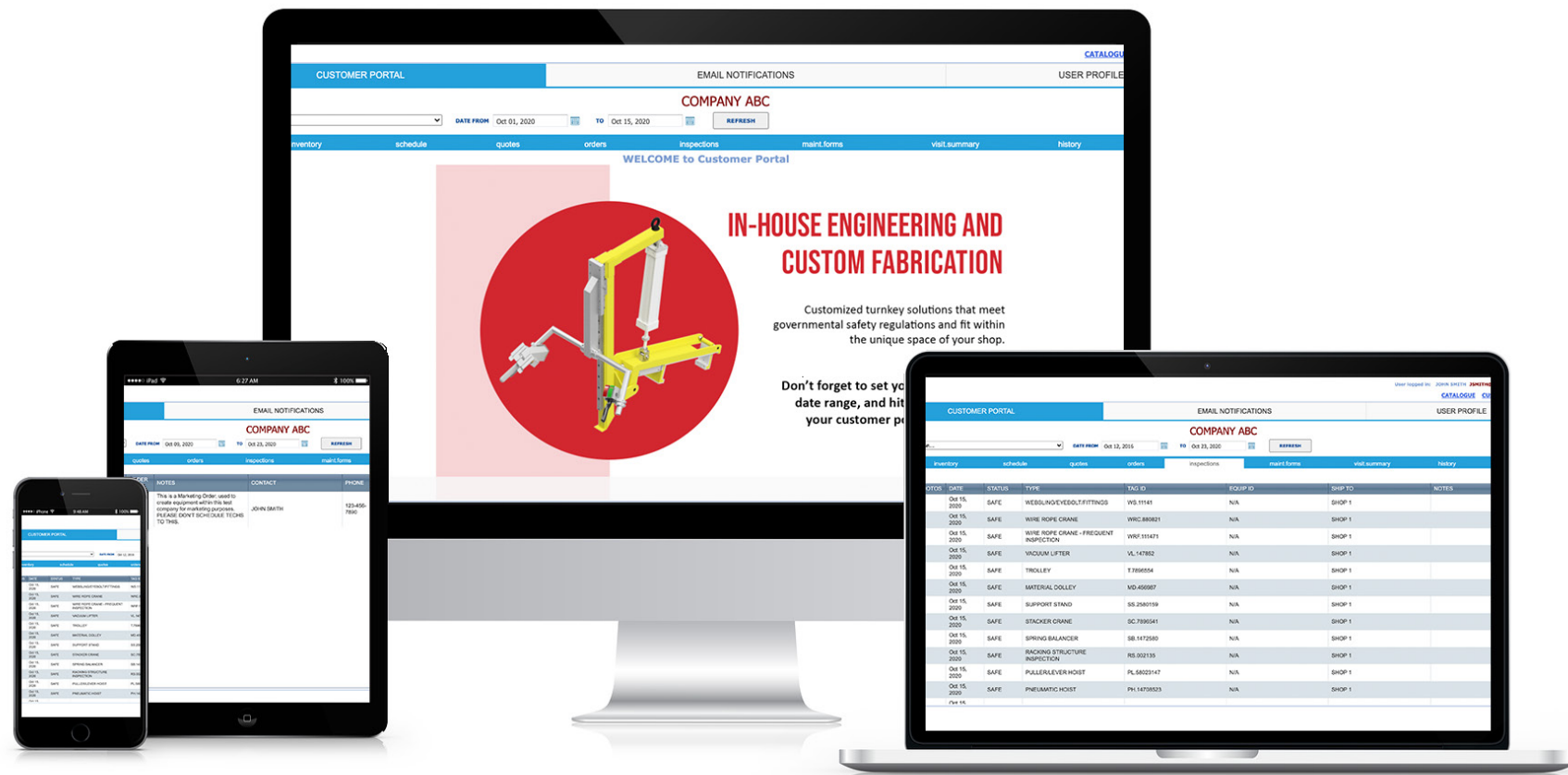
[SAVE] [RETURN]

## How to share documents

The documents tab is great for sharing large files between clients, all from one easy location.

- 1 To view and share any of your documents, simply click the “View File” link.
- 2 Your documents are housed within our database and can be shared through the web link generated when the PDF opens in a new tab.

UPDATE ON	UPDATE BY	ORIG.FILE NAME	
Feb 17, 2021 10:04:24 AM	JSMITH	ADDENDUM-Q21-1686JC - Repairs to Indoor and Outdoor Gym Equipment.pdf	<a href="#">View File</a>
Feb 17, 2021 10:03:13 AM	JSMITH	WSIBClearanceCertificate - PARCS.pdf	<a href="#">View File</a>



## Contact us

Our team is here to help if you need any further assistance or need to speak with a representative from our team. Please reach out to us at the following contact information and we will be happy to support.

- Toll Free: 1-800-977-2005
- Phone: 519-896-2430
- Email: [info@liftsafeinspections.com](mailto:info@liftsafeinspections.com)





# FAQ

## Frequently asked questions about the Liftsafe Customer Portal

### Q. Why am I getting email notifications?

**A.** Your email notifications are pre-set to send you reminders for your inspections, and services. You can edit the frequency of notifications using the following instructions. Once you have clicked on the email notifications tab you can select or de-select any of the boxes that do or do not apply to your account.

Once satisfied with your notification selections, click save. Not clicking save will cause your updates to be lost when you navigate away from the page.

### Q. Why can't I find my data?

**A.** Be sure to select location, date and click refresh (you must always click refresh when you are adjusting date ranges and locations).

The location drop-down menu allows you to access specific information on each location if applicable. The date can be adjusted to backdate and receive further information on previous work. Once your date range is selected, press the refresh button to update.

### Q. How do I reset my password?

**A.** The USER PROFILE tab is where you can reset your password when you first get access to your account and can be accessed at any time for security changes. Your company information and email on file will be listed. To reset your password:

1. Click on the user profile tab.
2. Type in your existing password.
3. Type in your new password.
4. Retype your new password.
5. Click save.

### Q. How do I merge PDFs?

**A.** When on the INSPECTIONS TAB, PDF MERGE allows you to combine all or some of your certificates into one PDF document.

1. Click on the PDF MERGE button in the top left corner
2. Set location, date and type, then click find.
3. Click add on the certificates you would like to add into the PDF.
4. When finished adding all the certificates, hit PDF MERGE.

### Q. Where is my reset password email?

**A.** Have you reset your password but have not received the confirmation email? This email is often sent to your junk box and we recommend checking that before resetting your password again. If the email is still missing please contact us via one of the following methods.

1. Toll Free: 1-800-977-2005
2. Phone: 519-896-2430
3. Email: [info@liftsafeinspections.com](mailto:info@liftsafeinspections.com)

### Q. What is a PM alert?

**A.** A PREVENTATIVE MAINTENANCE alert, assigns PM frequency relative to each piece of equipment. Remember to set an alert for your PM schedules to ensure your equipment is always properly maintained.

**Q. How do I access my certificates?**

**A.** To access your certificates under the INSPECTIONS TAB, be sure to first search the location and date and click refresh (remember you must always click refresh when you are adjusting date ranges and locations).

Click on the certificate number found on the far left column. A pop-up with a link to the certificate will generate.

**Q. How do I set a PM alert?**

**A.** Under the INSPECTIONS TAB simply go to the column that says PM alert, click on Not Set. The update item pop-up will open and you can adjust the PM alert frequency before selecting the save button.

**Q. How do I approve/decline/edit an order?**

**A.** Under the ORDERS TAB be sure to select location, date and click refresh. Click on 'select' found on the far right column of any order. A preview of the order will generate. Once you are ready to approve your order, click the approve button at the bottom of the page and the status will update accordingly. To edit your order you will see a customer notes section at the bottom of the PDF preview. You can make any comments or document any questions for us to review before the quote is approved. You must select approve to send edits. Your request will be confirmed by one of our reps. If you encounter any issues contact us at 1-866-496-6600.

**Q. How do I submit a multi-items request?**

**A.** Under the INVENTORY TAB go to the top right corner and select the Multi-items Request button. This will open a pop-up window showing all of your annual inspection items for this location. Fill in the form and click send.

