CMS Instructions

LOG IN
To log into the ExVeritas CMS system navigate to the following URL:

![Login Screen](image)

Log in to the system using the credentials that were email to you. Once logged in you will see the Quotes screen.

QUOTE REQUESTS
There are 4 quote requests drop downs to view the current quotes that are; Awaiting Approval, Submitted by me, Approved to Quote and All.

QUOTE REQUEST STATUS

AWAITING APPROVAL
Here you will see any quotes requests that are currently awaiting approval.
You can view the details of a quote request by clicking on the icon.

Here you can approve the quote by entering your name into the “Approved by” field and clicking submit.

**SUBMITTED BY ME**

Here you can view any quote requests that you have submitted to ExVeritas.
You can view the details of a submitted quote request by clicking on the Icon.

**APPROVED TO QUOTE**

Here you can view any quote requests that have been approved for a quote by ExVeritas.

You can view the details of these approved requests by clicking on the Icon.

**ALL**

Here you can view all quote requests regardless of the current status. You can also search for a quote using the search box.
You can review the details of any quote request by clicking on the icon.

**SUBMITTING A NEW QUOTE REQUEST**

You can submit a new quote request from any page within the quote requests menu by using the buttons at the top of the screen.

**REQUEST PRODUCT CERTIFICATION**

To request a quote for a product certification select the relevant button at the top of the screen. This will open the quote request from where you need to fill in all of the details.
Once this has been completed you can submit this to ExVeritas by filling in the approved by field and clicking submit.

REQUEST QUALITY CERTIFICATE

To request a quote for a quality certification select the relevant button at the top of the screen. This will open the quote request from where you need to fill in all of the details.
Once this has been completed you can submit this to ExVeritas by filling in the approved by field and clicking submit.

**REQUEST TRAINING CERTIFICATE**

To request a quote for a training certificate select the relevant button at the top of the screen. This will open the quote request from where you need to fill in all of the details.
Once this has been completed you can submit this to ExVeritas by filling in the approved by field and clicking submit.

LODGE TECHNICAL FILE

To request a quote for a lodge technical file select the relevant button at the top of the screen. This will open the quote request from where you need to fill in all of the details.
Once this has been completed you can submit this to ExVeritas by filling in the approved by field and clicking submit.

GENERAL REQUEST

To request a quote for a training certificate select the relevant button at the top of the screen. This will open the quote request from where you need to fill in all of the details.

Once this has been completed you can submit this to ExVeritas by filling in the approved by field and clicking submit.

QUOTES

There are 4 quote drop downs to view the current quotes that are; Open Quotes, Converted Quotes, Closed Quotes and All.
This is where you can view and approve any quotes that have been sent you from ExVeritas.

You can view the details of a quote by clicking on the icon.

Here you can approve or decline a quote.

To decline a quote you need to select a reason using the drop down list of options and then select the decline quote button at the bottom of the screen.
You can also approve the quote by clicking on the Approve Quote button.

CONVERTED QUOTES

Here you can view any quotes that have been converted into a project.

You can view the details of a converted quote by clicking on the icon.
CLOSED QUOTES

Here you can view the details of a closed quote.

You can view the details of a closed quote by clicking on the icon.
Here you can view all quotes regardless of the current status. You can also search for a quote using the search box.

You can review the details of any quote request by clicking on the icon.

**PROJECTS**

There are 2 Project drop downs to view the current and closed projects.

**PROJECT STATUS**

**OPEN PROJECT**

Here you can view all of the current projects and their status that you have with ExVeritas.
You can view further details of a project by clicking on the icon.

You also have the option to request a change to the project. To do this click the “Request Change” button at the bottom of the project details screen.
Here you can enter the details of the change and then submit it to ExVeritas by clicking the submit button.

Using the menu at the top of the screen you have the options to see a status history, files, and change requests.

CLOSED PROJECT

Here you can view all of the closed projects that you have with ExVeritas.

You can view further details of a project by clicking on the icon.
Using the menu at the top of the screen you have the options to see a status history, files, and change requests.

CERTIFICATES

There are 3 Certificate drop downs to view certificates. Equipment Certificates; Quality Certificates and Training Certificates.

EQUIPMENT CERTIFICATES

Here you can view all equipment certificates that have been issued to you by ExVeritas.
You can view further details of a project by clicking on the icon.

You can also see standards, Concessions, variations and files associated to the certificate by using the menu options at the top of the screen.
QUALITY CERTIFICATES

Here you can view all quality certificates that have been issued to you by ExVeritas.

You can view further details of a project by clicking on the icon.
You can also see files associated to the certificate by using the menu options at the top of the screen.

**TRAINING CERTIFICATES**

Here you can view any training certificates that have been issued to you by ExVeritas.

You can view further details of a project by clicking on the icon.

You can also see files associated to the certificate by using the menu options at the top of the screen.