Table of Contents

01 Account Access

How to register, sign in, and recover your password

Before you can use the Inquiry Module, the Report Module, or the Chat Module, you need a QRS ERP account. This section walks you through the three account-related screens you will encounter: **Sign Up** (create new account), **Sign In** (log in with existing credentials), and **Forgot Password** (reset password via email OTP).

> **About the OTP code**
> Both Sign Up and Forgot Password use a one-time password (OTP) sent to your work email. The OTP is a 6-digit code that proves you own the email address. It expires after 10 minutes — if you wait too long, simply request a new one.

Sign In - returning users

If you already have an account, this is the screen you will see at *https://qrs-portal/login* (or your company's QRS URL).

1. **Open the QRS portal in your browser**
   You will see the **Welcome Back** screen with the QRS coat-of-arms logo at the top, followed by two input fields and a blue **Sign In** button.

2. **Enter your registered email address**
   Type the email address you used when registering (for example *developer1@altayaboon.com*). The system will look up your account by this email.

3. **Enter your password**
   Click the password field and type your password. Click the **eye icon** on the right side of the field to toggle password visibility — useful when you want to confirm what you typed.

4. **Click 'Sign In'**
   The blue **Sign In** button submits your credentials. If correct, you are taken straight to the Dashboard. If incorrect, an error message appears under the form.

5. **If you forgot your password**
   Click the **Forgot password?** link below the Sign In button. It takes you to the password reset screen (covered later in this section).

> **Tip - first-time visitors**
> If you do not have an account yet, look for the **Don't have an account?** section at the bottom of the Sign In screen. Click the **Create Account** button to register. Skip ahead to the Sign Up steps below.

01 Sign Up - Create a New Account

How to register from scratch (new users only)

Use this flow only if you are setting up a brand-new QRS account. If your manager has already created an account for you, skip this and use Sign In instead. After signup, you will receive a 6-digit OTP code on your email to verify your address.

1. **Click 'Create Account' on the Sign In screen**
   On the Welcome Back screen, scroll to the bottom and click the pink **Create Account** button. The Sign Up form opens.

2. **Enter your First Name and Last Name**
   These names will appear in the system whenever you submit an inquiry, send a chat message, or appear in reports. Use your real name as registered with HR — no nicknames.

3. **Enter your work email address**
   Use your **work email only** (for example *yourname@altayaboon.com* or *yourname@iicc.ae*). Personal emails (Gmail, Yahoo, Hotmail) are usually rejected by your admin policy.

4. **Choose a strong password**
   Use at least 8 characters mixing letters, numbers, and symbols. Click the **eye icon** to verify what you typed. Avoid simple passwords like *123456* or *password* - these are blocked by the system.

5. **Re-type the password in 'Confirm Password'**
   Repeat the same password exactly. If the two fields do not match, the form will reject your submission. The eye icon works here too.

6. **Click the blue 'Create Account' button**
   The system creates your account and sends a 6-digit OTP code to the email address you provided. You will be taken to a verification screen.

7. **Open your email - find the OTP**
   Check your inbox for an email from *QRS System* with the subject **Your verification code**. The email contains a 6-digit number. If you do not see it within 1 minute, check Spam or Junk folder.

8. **Enter the OTP and submit**
   Type the 6-digit code into the verification field on the QRS screen and click **Verify**. Your account is now active and you are signed in.

> **Important - one account per email**
> Each email address can only have one account. If you try to sign up with an email that is already registered, you will get an error. In that case, use **Sign In** with your existing password, or **Forgot Password** if you do not remember it.

01 Forgot Password - Reset via OTP

Recover access when you cannot remember your password

If you forget your password, you can reset it without contacting IT. The system will email you a 6-digit OTP code, and you choose a new password right after entering it. The whole process takes less than 2 minutes.

1. **Click 'Forgot password?' on the Sign In screen**
   Below the blue Sign In button, you will see a small pink link that says **Forgot password?**. Click it to open the password recovery screen.

2. **You will see the 'Forgot Password?' screen**
   The screen says **Enter your email and we will send an OTP code**. There is one email field and a blue **Send OTP Code** button.

3. **Enter your registered email**
   Type the email address linked to your account. It must match exactly the email you used during signup. If you enter a wrong email, you will not receive the OTP.

4. **Click 'Send OTP Code'**
   The system sends a 6-digit code to your email. You will see a confirmation message: **OTP sent to your email - please check inbox**.

5. **Open your email - find the OTP**
   Look for an email from *QRS System* with subject **Password reset code**. Note - the OTP is valid for only 10 minutes. If it expires, click **Resend OTP** on the QRS screen.

6. **Enter the OTP**
   Back on the QRS screen, type the 6-digit code into the verification box. Click **Verify**. The system confirms the code and shows the new password form.

7. **Set a new password**
   Type a new password in the **New Password** field, then re-type it in **Confirm New Password**. Use the eye icon to verify spelling. Use a different password than your old one (the system blocks reusing the last password).

8. **Click 'Reset Password' and sign in**
   The system saves your new password and redirects you to the Sign In screen. Enter your email and the new password to log in. You are done.

Did not receive the OTP email?

Check these in order: (1) your **Spam / Junk** folder, (2) confirm you entered the correct email address, (3) wait 1-2 minutes (delivery can be slow), (4) click **Resend OTP** on the screen. If still nothing arrives after 5 minutes, contact IT support - your email may be blocked by the company spam filter.

Quick comparison - which to use

Situation	Use this screen
I have an account and remember my password	**Sign In**
I have an account but forgot my password	**Forgot Password (OTP)**
I do not have an account yet	**Sign Up / Create Account (OTP)**
My account was disabled by admin	**Contact IT - cannot self-recover**
I changed my email at work	**Contact IT - email change requires admin**

02 Introduction & Purpose

Welcome to the QRS Inquiry & Report Module manual. This guide is designed specifically for the **Marketing Team** to walk you through every step of submitting client inquiries, tracking their progress through the certification workflow, and producing professional reports for management.

By the end of this manual, you will be able to:

- Submit a complete client inquiry with all required documentation
- Choose the correct certification body (QRS or TQS) and audit stage
- Track inquiries as they move through the 6-stage workflow
- Understand each status change and what action it requires from you
- Review, confirm, and request changes on certification drafts
- Filter, analyze, and export the inquiry report for management
- Troubleshoot common issues without needing IT support

Who should read this manual?

All marketing team members who interact with the QRS ERP system — whether you submit inquiries, follow up with clients, or report progress to management. No technical background is required.

Quick navigation tip

Use the Table of Contents on the previous page to jump to any section. Each step includes screenshots-style descriptions and color-coded badges that match exactly what you see on screen.

03 Understanding the Inquiry Module

What it does and why it matters

The Inquiry Module is the **starting point** of every certification engagement. When a client approaches QRS for ISO certification — whether it's their first audit, a routine surveillance, or a re-certification — the marketing team creates an inquiry record in the system. This record then flows through the scheme department, who review the details, draft the proposal, and ultimately issue the final certificate.

Why this module exists

Before this system, inquiries were tracked in spreadsheets and emails — which made it difficult to know the current status, who was responsible, and what documentation was attached. The Inquiry Module solves these problems by giving every inquiry:

[v]	**A unique reference number**	*INQ-2026-05-0001*
[v]	**A clear status at every moment**	*Pending, In Review, etc.*
[v]	**All client documents in one place**	*Trade license, prior cert, etc.*
[v]	**Automatic email notifications**	*To you, to scheme, to management*
[v]	**Full audit trail**	*Who did what, and when*

Three types of inquiries

Every inquiry is classified by type. This drives what fields are required and how the scheme team handles it:

INITIAL	First-time certification for a brand new client.	No previous certificate. Audit Stage: Stage 1 -> Stage 2.
SURVEILLANCE	Routine ongoing audit during the 3-year certificate cycle.	Previous cert required. Audit Stage: Surveillance.
RE-CERTIFICATION	Renewing the certificate at the end of its 3-year validity.	Previous cert required. Audit Stage: Recertification.

04 Workflow Overview — 6 Stages

Every inquiry passes through these stages in order

The certification workflow consists of **6 sequential stages**. Each stage represents the current state of an inquiry, who owns it at that moment, and what action is needed to move it forward.

1. **Pending**
   Inquiry has been submitted by Marketing. Waiting for the Scheme department to begin review.

2. **In Review**
   Scheme is actively reviewing the client's details, scope, and uploaded documents.

3. **Draft Ready**
   Scheme has generated a draft certificate proposal. Marketing/client must review and approve.

4. **Changes Requested**
   Marketing or client has requested corrections to the draft. Scheme will revise it.

5. **Client Confirmed**
   Client has approved the draft. The inquiry is now ready for final issuance.

6. **Final Issued**
   The certificate has been formally issued. The certification process is complete.

Important

An inquiry can loop between **Draft Ready** and **Changes Requested** multiple times until the client is satisfied. There is no penalty for requesting changes — the system is designed to support this back-and-forth.

04 Workflow at a Glance

How an inquiry moves through the system

	MARKETING	->	SCHEME	->	CLIENT	->	SCHEME
Action:	Submit		Review + Draft		Approve or Reject		Issue Final
Status:	Pending		In Review -> Draft Ready		Confirmed or Changes Req.		Final Issued

Who is responsible at each stage?

Stage	Owner	What you (Marketing) do
Pending	**Marketing**	Just submitted — wait for Scheme. No action.
In Review	**Scheme**	Wait for Scheme to finish review. Answer questions if asked.
Draft Ready	**Marketing / Client**	Review draft -> confirm OR request changes.
Changes Requested	**Scheme**	Wait for Scheme to apply changes. Status returns to Draft Ready.
Client Confirmed	**Scheme**	Wait for Scheme to issue final certificate.
Final Issued	**Done!**	Forward final certificate to client. Archive inquiry.

05 How to Submit a New Inquiry

Step-by-step guide from login to submission

1. **Log in to the QRS ERP system**
   Open your browser and go to the QRS portal. Enter your username and password. If you've forgotten your password, click 'Forgot Password' or contact IT. After login, you'll land on the Dashboard.

2. **Navigate to the Inquiries module**
   From the left-side menu, click **Modules -> Inquiries**. You will see the Inquiries page with a list of all existing inquiries, plus a blue **+ Add Inquiry** button at the top right.

3. **Click '+ Add Inquiry' to open the form**
   A multi-step form will appear with sections for Company, Inquiry Type, Certification Body, Audit Details, Scope, ISO Standards, Documents, and Notes. Required fields are marked with a red asterisk (*).

4. **Select the company**
   Start typing the client's company name in the dropdown — matching companies will appear. If the company doesn't exist yet, click **+ New Company** in the dropdown to create it.

5. **Choose Inquiry Type & Cert Body**
   Select one of: **INITIAL**, **SURVEILLANCE**, or **RE-CERTIFICATION**. Then select the Certification Body — either **QRS** or **TQS**. These two fields together drive most of the workflow.

6. **Fill in audit details**
   Enter the proposed Audit Date, the Auditor Name (if known), and choose the **Audit Stage** from the dropdown. For Surveillance and Re-certification inquiries, you must also enter the Previous Certificate Number.

7. **Add the scope of work**
   In the Scope of Work text area, describe what the client does — the activities, products, or services the certificate will cover. Be specific. Scheme uses this exactly when drafting the proposal.

8. **Select ISO Standards**
   Click the standards dropdown and select all standards the client wants to be certified against (e.g., ISO 9001:2015, ISO 14001:2015, ISO 45001:2018). You can select multiple.

9. **Upload supporting documents**
   Attach the Trade License, the Previous Certificate (for Surveillance/Re-cert), and any relevant Audit Reports or Scope Letters. Click **+ Add File**, choose the file, then label it correctly.

10

Add notes (optional) and submit

Use the Notes field for anything Scheme should know — special client requests, deadlines, holidays, language preferences. Click the green **Submit Inquiry** button at the bottom. The inquiry is now in **Pending** status.

What happens after I click Submit?

The system instantly: (1) saves the inquiry with a unique reference like **INQ-2026-05-0001**, (2) emails the Scheme team and management, (3) shows a real-time notification to the relevant people, and (4) sets the status to **Pending**. You'll see the new inquiry appear at the top of the table.

06 Field-by-Field Reference

What every field in the inquiry form means

Field	Required?	What to enter
Company	Yes	The full legal name of the client. Must match their trade license.
Inquiry Type	Yes	INITIAL (new client), SURVEILLANCE (routine), or RE-CERTIFICATION (renewal).
Cert Body	Yes	QRS or TQS — which certification body will issue the certificate.
Audit Stage	Recommended	Stage 1, Stage 2, Surveillance, or Recertification. Used by Scheme for planning.
Audit Date	Yes	The proposed date for the on-site audit. Can be adjusted later.
Auditor Name	No	Name of the proposed lead auditor, if already known.
Previous Cert No.	Conditional	Required for SURVEILLANCE and RE-CERTIFICATION. Format: certificate numbe
Issue Date	No	Date the previous certificate was issued (for Surveillance / Re-cert).
Expiry Date	No	Date the previous certificate expires.
Surv. Audit Due	No	Date by which the next surveillance audit must be completed.
Re-cert Due	No	Date by which re-certification must occur.
EA Code (Accred.)	No	The European Accreditation code for the client's industry sector.
Scope of Work	Yes	Detailed description of activities, products, or services to be certified.
ISO Standards	Yes	Select all standards being requested (e.g., ISO 9001, 14001, 45001).
Documents	Yes	Upload Trade License + Previous Certificate (if applicable) + any others.
Notes	No	Any extra context, special requests, or messages for the Scheme team.

About document uploads

Each uploaded document must be labeled. Use the labels: **Trade License**, **Previous Certificate**, **Audit Report**, **Scope Letter**, or **Other**. Maximum file size is 10 MB. Accepted formats: PDF, DOCX, JPG, PNG.

07 Certification Body & Audit Stage

Two new fields you must understand

These two fields are **recently added** and may be unfamiliar. They are important because they determine which body issues the certificate and how the audit is classified for management reporting.

Certification Body

Every inquiry must be assigned to one of two bodies:

QRS	**Quality Registrar Systems**	The primary QRS-branded body. Used for most standard certifications.
TQS	**Third-party Quality Systems**	Alternative body used in specific regional or sector cases. Check with your manager if unsure.

Audit Stage

The audit stage classifies *where* in the certification lifecycle the audit falls. There are 4 options:

Stage 1	Initial document review audit. First step of certification.	*Use for INITIAL inquiries.*
Stage 2	On-site implementation audit. Confirms the system works.	*Use after a successful Stage 1.*
Surveillance	Annual check during the 3-year validity period.	*Use for SURVEILLANCE inquiries.*
Recertification	Full audit at the end of 3 years to renew.	*Use for RE-CERTIFICATION inquiries.*

Quick decision rule

If unsure which Audit Stage to pick: match it to the Inquiry Type. INITIAL -> Stage 1 (then Stage 2 later). SURVEILLANCE -> Surveillance. RE-CERTIFICATION -> Recertification. When in doubt, ask the Scheme team.

08 Status Workflow & Actions

What buttons you'll see at each stage

The system shows different action buttons depending on the inquiry's current status. This prevents accidental clicks and keeps everyone on the same page.

* Pending

What you see: Edit · View · Delete (admin only)

What to do: **Wait. Scheme will start review automatically.**

* In Review

What you see: View · Edit (limited)

What to do: **Wait for Scheme. Answer any clarification emails.**

* Draft Ready

What you see: View · Download PDF · Download Word · Confirm · Request Changes

What to do: **Open the draft. Review with the client. Then either Confirm or Request Changes.**

* Changes Requested

What you see: View · See change request notes

What to do: **Wait for Scheme to revise. Status will return to Draft Ready.**

* Client Confirmed

What you see: View · Download PDF · Download Word

What to do: **Wait for Scheme to issue final certificate.**

* Final Issued

What you see: View · Download Final PDF · Archive

What to do: **Send final certificate to the client. Archive the inquiry.**

09 Reviewing & Confirming Drafts

What to do when an inquiry reaches Draft Ready (review only)

When the Scheme department finishes their review, they generate a draft proposal. The status changes to **Draft Ready** and you'll receive an email notification. This is the moment you involve the client.

1 Open the inquiry from the table
Click the inquiry's reference number, or click **View**. The detail modal opens with the new draft attached.

2 Download the draft files
You'll see two new buttons: **Download PDF** and **Download Word**. Use the PDF for sending to the client. The Word version is in case minor edits are needed before review.

3 Send to the client
Email the PDF to your client contact. Wait for their feedback. They will either approve as-is, or send back specific corrections.

4a If client approves: click 'Confirm Draft'
Status changes to **Client Confirmed**. Scheme is automatically notified and begins the final issuance step.

4b If client wants changes: click 'Request Changes'
A small dialog appears asking for the client's feedback. Type the specific changes the client wants (e.g., 'Update scope to include manufacturing plant 2'). Submit. Status changes to **Changes Requested**. Scheme is notified and will revise the draft.

5 Repeat if needed
The cycle Draft Ready <-> Changes Requested can repeat as many times as needed. Each time, Scheme generates a new draft and you re-send to the client.

> **Important: be specific in change requests**
> When clicking **Request Changes**, write the exact changes needed — not just 'client wants changes'. Scheme works from your text directly. Bad: "Update scope." Good: "Add 'manufacturing of polymer-based products' to scope. Remove 'trading' as client no longer trades."

10 Email Notifications

Who gets emailed and when

The system automatically sends emails for every important status change. You don't need to remember to inform anyone — the system handles it.

Event	Who gets emailed	What the email contains
New Inquiry submitted	Scheme team + Management (CO)	Reference, Company, Type, Cert Body, Audit Stage, Scope su
Status: In Review	Marketing (submitter)	Confirmation that Scheme has started review.
Status: Draft Ready	Marketing + Management	Notification with download links for the PDF and Word draft.
Status: Changes Requested	Scheme team + Management (CO)	Includes the specific change request notes you entered.
Status: Client Confirmed	Scheme team + Management (CO)	Notification that the draft is approved and ready for issuance.
Status: Final Issued	Marketing + Management	Final certificate notification with download link.

In-app notifications

Besides email, the system also shows a small bell icon () in the top right of the screen. Click it to see all notifications related to your inquiries — including ones you may have missed in email.

11 The Report Module — Overview

Your tool for management reporting

The Report Module is a separate page that gives you a high-level view of all inquiries — analytics, charts, distributions, and a downloadable PDF report. Use it whenever your manager asks 'how are we doing this month?' or 'how many inquiries did we close in Q1?'

How to access it

1. **Open the Inquiries page**
   From Modules -> Inquiries.
2. **Click the 'Reports' button at the top**
   It's a teal button in the toolbar, usually next to Analytics. Or navigate directly to **Modules -> Inquiries -> Reports**.
3. **The report opens in a new view**
   You'll see a dark gradient hero header followed by a series of analytics sections. The data loads automatically based on default filters.

What sections you'll see

#	Section	Shows
01	**Executive Summary**	8 KPI cards: Total, Pending, In Review, Draft Ready, etc.
02	**Cert Body & Audit Stage**	QRS vs TQS counts + Stage 1/2 vs Surveillance/Recert.
03	**Workflow Pipeline**	Visual 6-stage pipeline showing where every inquiry sits.
04	**Distribution Analysis**	Donut charts for status & inquiry type.
05	**Top Contributors**	Most active auditors and submitters.
06	**ISO Standards Demand**	Most-requested standards across inquiries.
07	**Monthly Trend**	Bar chart of inquiries per month — clickable.
08	**Inquiry List**	Full table of inquiries matching your filters.

12 Using Report Filters

Slice the data exactly the way you need

At the top of the report you'll see a filter bar with 6 dropdowns. Adjust them and the entire report — KPIs, charts, list — refreshes instantly.

Filter	Default	Use case
Year	Current year	Pick another year to compare historical performance.
Month	All Months	Narrow to a specific month for monthly reviews.
Status	All Statuses	Filter to e.g. 'Pending' to see only what needs attention.
Type	All Types	Filter to 'INITIAL' to see only new client onboarding.
Cert Body	All Bodies	Filter to QRS only or TQS only — for body-specific reporting.
Audit Stage	All Stages	Filter to 'Stage 1' to see only first-stage audits, etc.

Practical examples

Monthly review meeting

Year = current, Month = previous month, others = All. Gives you a clean snapshot of last month's performance.

QRS body performance

All filters = All except Cert Body = QRS. Shows only QRS-branded inquiries — useful for QRS-specific KPIs.

First-time customer onboarding

Type = INITIAL, Audit Stage = Stage 1. Shows only first-stage audits for new clients.

What's stuck?

Status = Pending OR Status = Changes Requested. Highlights inquiries that need someone's attention.

Tip: 'Clear Filters' button

If you've narrowed the report too much and seeing 0 results, just click **X Clear Filters** in the filter bar to reset everything to defaults.

13 Reading the KPIs & Charts

How to interpret what you see on screen

KPI cards (Section 01)

These are the big number tiles at the top. Each card shows a single metric. The colored bar at the top of each card is just visual styling — no meaning.

Card	What it means
Total Inquiries	All inquiries matching your filters. The 'biggest picture' number.
Pending	Submitted but not yet picked up by Scheme. If this is high, something is stuck.
In Review	Currently being reviewed by Scheme. Healthy when small and moving.
Draft Ready	Awaiting client approval. If high, marketing has follow-up to do.
Changes Requested	Drafts the client wants revised. If high, something is wrong with how scope is being captured.
Client Confirmed	Approved by client, awaiting final issuance from Scheme.
Final Issued	Successfully completed. The success metric.
Conversion Rate	Percentage of total that reached Final Issued. Higher is better. Target: 70%+.

Cert Body / Audit Stage KPIs (Section 02)

Four cards show: **QRS Inquiries**, **TQS Inquiries**, **Stage 1 + Stage 2** (initial certifications), and **Surveillance + Recert** (ongoing audits). The donut charts below break this down visually.

Workflow Pipeline (Section 03)

A horizontal flow diagram showing all 6 stages with the count at each. If you see big numbers stuck at 'Pending' or 'Changes Requested', that's a bottleneck worth investigating.

Donut charts (Section 04)

Two side-by-side donuts: one for status distribution, one for inquiry type. Each segment shows count + percentage of total. Helpful for instant proportional understanding.

Top Contributors & Standards (Sections 05–06)

Ranked lists. Use these to recognize high performers and spot which ISO standards are most in demand — useful for marketing campaigns.

Monthly Trend (Section 07)

Bar chart showing inquiry counts per month for the selected year. **Click any bar** to filter the entire report to just that month — a quick way to drill in.

Inquiry List (Section 08)

The full data table. Shows up to 50 rows on screen. The PDF download contains all rows. Each row has color-coded badges for type, cert body, audit stage, and status — making it easy to scan.

14 Exporting & Printing Reports

Three ways to share the report with management

1. **Apply your filters first**
The export uses whatever filters you've set. So before exporting, narrow the report exactly the way you want it shared.

2. **Click 'v Download PDF' in the top right**
A teal button at the top of the page. The system generates a multi-page PDF of the entire report — including all charts, tables, and analytics. The filename includes the year, month, and active filters.

3. **Or click ' Print'**
Opens your browser's print dialog. The report is print-optimized — filter bar and action buttons are hidden, and content fits A4.

4. **Or use 'Refresh' to reload**
If new inquiries have been added during your session, click **Refresh** to pull the latest data without reloading the page.

What the PDF looks like

The downloaded PDF is a high-resolution capture of exactly what's on screen. It includes the dark gradient hero header, all 8 sections, and the QRS branding footer. Suitable for sending directly to management or printing professionally.

PDF generation takes a few seconds

Don't refresh the page while the PDF is being created. You'll see **'Generating PDF…'** on the button. Wait until your browser pops up the save dialog. For large reports (1000+ inquiries) this may take 10–15 seconds.

15 Chat & Messaging Module

Real-time team chat for urgent matters

The Chat Module is a built-in **real-time messenger** — works just like WhatsApp but inside the QRS system. Use it whenever you need a fast response from the Scheme department, a coordinator, or a developer — especially for urgent matters where email is too slow.

What makes it different from email?

Chat is **instant** — your message arrives in seconds and you can see when the other person is online. You can attach certificates, screenshots, and documents directly in the chat. Messages are kept as a permanent conversation history, easy to search and refer back to.

When to use chat vs. email

Situation	Use Chat	Use Email
Urgent question (need answer in minutes)	[v]	
Sharing a screenshot or quick file	[v]	
Following up on a stuck inquiry	[v]	
Asking the developer about a bug	[v]	
Coordinating audit dates with the coordinator	[v]	
Formal status updates / official records		[v]
Communicating with external clients		[v]
Long detailed proposal text		[v]

15 Using the Chat Module

Step-by-step: send your first message

1. **Open the Messages panel**
   Click the chat icon () in the bottom-right floating button, or look for **Messages** in the top navigation bar. A panel opens showing all your active conversations with a count at the top (e.g. **4 conversations**).

2. **Browse existing conversations**
   The Messages panel lists everyone you've already chatted with — newest at the top. Each row shows the person's avatar, name, last message preview, and time (Yesterday, Thu, Wed, etc.). A small green dot under the avatar means they're currently online.

3. **Switch between All and Unread tabs**
   Use the **All** tab to see everyone. Click **Unread** to see only conversations with new messages waiting for you. The Unread filter is very useful for catching up at the start of the day.

4. **Search for a specific conversation**
   If you have many chats, use the **Search conversations** bar at the top. Type any part of the person's name or the message text to filter the list.

5. **Start a new conversation**
   Click the small **compose icon** (in a square) at the top right of the Messages panel. A **New Message** dialog opens listing all 9 team members — Ana Sorita, Anisha C, Harshani A, KHOLA SAJID, Manzoor Ahmed, and others — with their email addresses and online/offline status.

6. **Pick the right person**
   Use the **Search by name or email** field at the top to find them faster. Click on the team member's row to open a fresh chat window. If they're offline, your message will be delivered when they come back online.

15 Sending Messages & Attachments

Text, files, screenshots, certificates

7 **Type your message**
At the bottom of the chat, click the **Type a message…** input field and type your text. Press **Enter** to send (or click the send arrow on the right). Your message appears as a purple bubble on the right side of the chat with a tiny [v] indicating it was delivered.

8 **Attach a file or certificate**
Click the **paperclip icon** next to the input field. A file picker opens. Choose any PDF, DOCX, JPG, or PNG file from your computer. The file uploads and appears as a thumbnail in the chat — the recipient can click to download it instantly.

9 **Add an emoji**
Click the **smiley icon** on the left of the input to open the emoji picker. Useful for marking urgency (), expressing thanks (), or confirmation ().

10 **Take and share a screenshot**
Use your computer's screenshot tool (Windows: **Win+Shift+S**; Mac: **Cmd+Shift+4**). Paste it directly into the chat input field, or save and attach via paperclip. Screenshots are the fastest way to show Scheme or developers exactly what you're seeing.

11 **Send a certificate for review**
Open the certificate's PDF on your screen, then drag-and-drop it into the chat window. Add a short message like "Issue date and expire date please check". The recipient sees both the file and your context together.

Real-time notifications
When someone sends you a chat message, you'll see: (1) a desktop notification (if your browser allows them), (2) a red unread count next to the chat icon, and (3) the message instantly inside the conversation if you have it open. No refresh needed.

15 Who to Message — and When

Pick the right person for the issue at hand

Issue	Who to message	Example
Inquiry stuck in 'Pending' or 'In Review'	**Scheme department**	*"Hi, INQ-2026-05-0003 has been pending for 3 days. Any update?"*
Draft contains incorrect company info	**Scheme department**	*[Attach screenshot] "Company name spelling is wrong on draft."*
Audit date conflicts with client availability	**Coordinator**	*"Client says May 15 doesn't work, can we reschedule to May 22?"*
Issue date / expiry date mismatch on certificate	**Scheme department**	*[Attach cert] "PROFILE RECRUITMENT — please verify dates."*
Form fields not loading / button not working	**Developer**	*[Attach screenshot] "Submit button does nothing."*
Cert Body / Audit Stage dropdown missing	**Developer**	*"Hard refresh didn't help. Still no Cert Body field."*
Logo, signature, or template wrong on PDF	**Developer + Scheme**	*[Attach PDF] "Letterhead is using the old logo."*
Need to share a sensitive document quickly	**Specific recipient only**	*Use chat — never group email for confidential files.*

Online vs. offline — what the green dot means

Each team member has a **green dot** under their avatar when they're online and active in the system. No dot (or grey) means they're offline. **Offline users still receive your messages** — they'll see them when they log back in, plus they'll get an email notification with a preview. So don't hesitate to message someone offline, but expect a delayed reply.

What counts as 'urgent'?

Use chat freely — but reserve **marker** or capital letters for genuinely urgent matters: client signing today, certificate error blocking issuance, audit happening tomorrow, etc. Overusing 'URGENT' loses its impact.

Best practices

(1) Lead with context — "Re: INQ-2026-05-0003" not just "Hey". (2) Attach files instead of describing them — saves time. (3) Don't send 10 short messages — combine into one. (4) Acknowledge receipt with or "Got it, will check" so the sender knows you saw it.

16 Quick Reference Card

Print this page and keep it at your desk

TASK	WHERE TO GO	WHAT TO CLICK
Submit a new inquiry	Inquiries page	`+ Add Inquiry → fill form → Submit`
Find an inquiry	Inquiries page	`Use the search bar (by Ref or Company)`
See full details	Inquiries table	`Click the Ref number, or click View`
Edit an inquiry	Detail modal or table row	`Click Edit`
Download a draft	When status = Draft Ready	`Download PDF / Download Word`
Confirm a draft	When status = Draft Ready	`Confirm Draft`
Request changes	When status = Draft Ready	`Request Changes → enter notes`
See analytics	Inquiries page	`Analytics button`
Open full report	Inquiries page	`Reports button → /inquiries/report`
Filter the report	Top of report page	`6 dropdowns: Year, Month, Status, Type, Cert Body, Stage`
Download report PDF	Top right of report page	`v Download PDF`
Print report	Top right of report page	`Print`
See notifications	Top of any page	`Bell icon`
Open chat / messages	Bottom-right of screen	`Chat icon -> see all conversations`
Start new chat	Inside Messages panel	`Compose icon -> pick team member`
Attach file in chat	Inside an open chat	`Paperclip icon -> choose file`
Filter unread chats	Inside Messages panel	`Click 'Unread' tab`

Status color legend

*** Pending**	*** In Review**	*** Draft Ready**	*** Changes Requested**	*** Client Confirmed**	*** Final Issued**

17 Troubleshooting & FAQ

Common issues and how to resolve them

Q1. I can't find the company in the dropdown.

Companies are added once. If a brand new client, click **+ New Company** in the dropdown. If you're certain the company exists, try searching by trade license number or partial name. Still missing? Contact admin.

Q2. The form won't let me submit — fields are red.

A red border = required field is empty or invalid. Scroll up to find the red fields and complete them. Common culprits: Audit Date, Scope of Work, ISO Standards selection, Trade License upload.

Q3. I uploaded the wrong document. How do I remove it?

Open the inquiry in Edit mode. In the Documents section, click the **X** next to the wrong file. Then upload the correct one. Save.

Q4. The client wants changes after I already clicked Confirm.

Once Confirmed, only Scheme can revert it. Email or Slack the Scheme team explaining what changed. They'll set status back to Draft Ready and revise.

Q5. I don't see Cert Body or Audit Stage on the form.

Hard-refresh your browser (Ctrl+Shift+R or Cmd+Shift+R). If still missing, you may be on an older version — log out, log back in. Still missing? Contact IT.

Q6. The report is showing 0 inquiries.

Your filters are likely too narrow. Click **X Clear Filters** at the top of the report and check defaults. Common cause: Year set to a future year or Month set when no inquiries exist for it.

Q7. PDF download fails.

Try again — sometimes it's a temporary glitch. If it still fails: clear browser cache, or try a different browser (Chrome works best). For very large reports, use filters to narrow first, then download.

Q8. I forgot whether I should choose QRS or TQS.

Default to QRS unless your manager specifically told you TQS. The two bodies are not interchangeable mid-process — once submitted with QRS, switching to TQS requires Scheme intervention.

Q9. Can I delete an inquiry?

Only admins can delete. Marketing users can edit but not delete. If you submitted a duplicate, contact your manager — they'll have admin delete it.

Q10. Where do email notifications go?

To the email address on your user profile. Check your settings if you're not receiving them. Also check Spam — first-time emails sometimes land there.

Q11. The chat shows 'Offline' for everyone — is the chat broken?

No. 'Offline' just means the team member is not currently logged in. Your message will still be delivered — they'll see it when they next open the system, and they'll also get an email notification. Offline doesn't mean unreachable.

Q12. I sent a chat message but the person hasn't replied. What now?

Check whether they were online (green dot) when you sent it. If offline, give them time — they may not be at their desk. For genuinely urgent matters, follow up with a phone call or escalate to your manager. Don't spam multiple chat messages in a row.

Q13. Can I send the same chat to multiple people at once?

Currently chat is one-to-one only. For announcements that need multiple people, use email. For urgent matters where 2–3 people need to coordinate, send the chat to your primary contact and ask them to loop in others.

Q14. What file types can I attach in chat?

PDF, DOCX, JPG, PNG, and most common formats. Max 10 MB per file. For larger files (videos, big PDFs), upload to Google Drive and paste the share link in chat instead.

Still stuck? Contact us — fastest channels first

Chat (Messages panel): fastest way to reach Scheme, coordinator, or developer. Use for urgent matters with file attachments. **Email:** for formal records or when chat is not appropriate. **Your manager:** for cert body decisions, scope clarifications, or policy questions. Use the in-app feedback button () to report bugs.

End of manual. Thank you for taking the time to read it!

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