



D A M S T R A

Manage Contractor
Company Categories

Safety



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Manage Contractor Categories

Introduction

Damstra Safety provides an easy and effective way of managing the many Contractor Companies that your Organisation may deal with, by sorting them into categories.

In this guide, we'll show how to **create**, **edit** and **delete** these categories in 'Settings', this can be found under the 'Profile' icon at the top of the screen.



Category A

Category B

Category C

Manage Contractor Categories Settings, People Section

Click to expand the 'People' section, then click 'Contractor Company Categories'.

The screenshot displays the 'Settings' interface of a software application. The page is organized into sections, each with a green circular icon and a title. The sections are: General, Governance, People, Risk, Synchroniser, Compliance, Training, Users, Events, and Assets. The 'People' section is currently expanded, revealing a grid of sub-sections: Contractor Company Categories (highlighted with a blue box and a mouse cursor), Person Types, Job Positions, Shift, Worker Reviews, Contractor Company Insurance, Inductions, and Licences. The 'Contractor Company Categories' sub-section is further expanded, showing a list of categories with columns for Name, Description, and Actions. The top right corner of the settings page contains icons for help, refresh, and user profile.

Manage Contractor Categories

Add Category

The 'Contractor Company Categories Register' is shown, which displays all existing categories that have already been created.

To add a new category, **click** 'Add', then type the name of category, then **click** 'Save'.

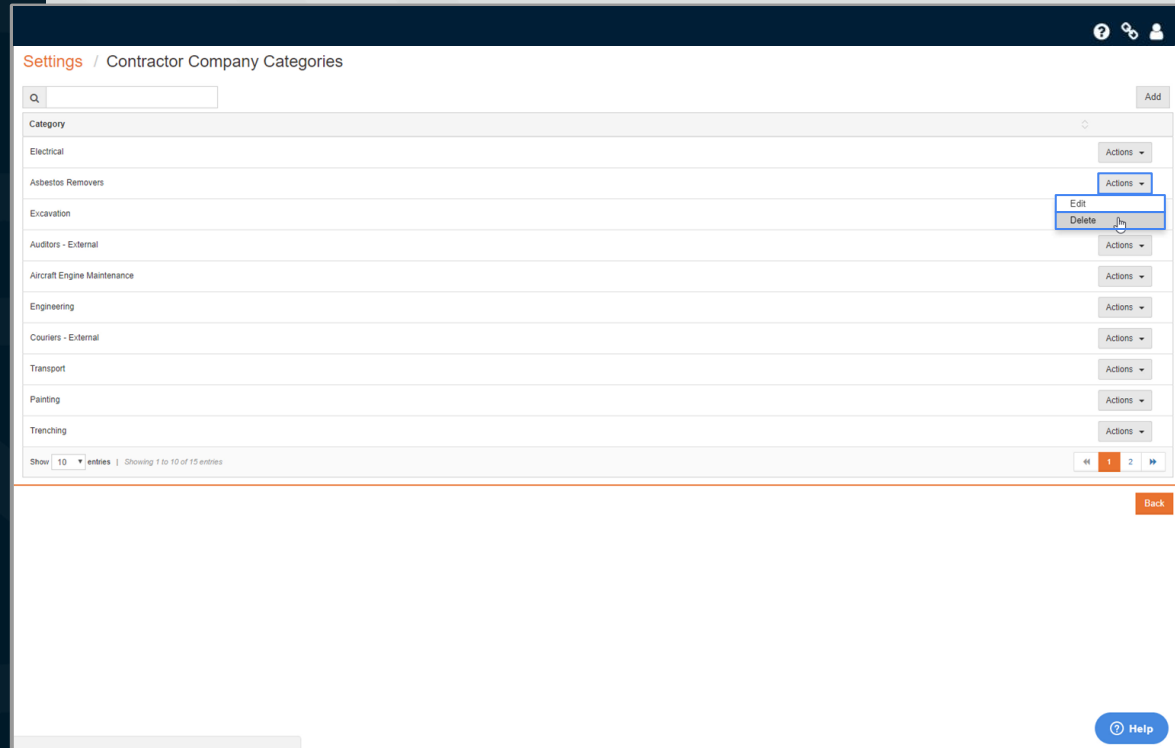
The screenshot displays the 'Settings / Contractor Company Categories' page. At the top right, there is a search bar and an 'Add' button. Below the search bar is a table with the following categories: Asbestos Removers, Excavation, Auditors - External, Aircraft Engine Maintenance, Engineering, Couriers - External, Transport, Painting, Trenching, and Masonry. Each row has an 'Actions' dropdown menu. At the bottom of the table, it says 'Show 10 entries | Showing 1 to 10 of 14 entries'. A modal form titled 'Add Contractor Company Category' is open in the foreground. It has a 'Category' label and a text input field containing 'Electrical'. At the bottom of the modal, there are 'Save' and 'Cancel' buttons. A 'Back' button is also visible in the top right corner of the modal area.

Manage Contractor Categories

Edit, Delete

The new category now appears in the 'Contractor Company Categories Register'.

To **edit** or **delete** an existing category, **click** 'Actions', followed by the appropriate selection.



The screenshot displays the 'Settings / Contractor Company Categories' page. At the top, there is a search bar and an 'Add' button. Below this is a table listing various contractor categories. Each row includes the category name and an 'Actions' dropdown menu. The 'Asbestos Removers' row is highlighted, and the 'Actions' dropdown is open, showing 'Edit' and 'Delete' options. The 'Delete' option is currently selected. At the bottom of the table, there is a pagination control showing 'Show 10 entries' and 'Showing 1 to 10 of 15 entries'. A 'Back' button is located in the bottom right corner of the table area. A 'Help' button is visible in the bottom right corner of the entire page.

Category	Actions
Electrical	Actions
Asbestos Removers	Actions
Excavation	Actions
Auditors - External	Actions
Aircraft Engine Maintenance	Actions
Engineering	Actions
Couriers - External	Actions
Transport	Actions
Painting	Actions
Trenching	Actions

Manage Contractor Categories

Using Categories

The new category may now be used when adding 'Contractor Companies' to the 'Company Register', and may be used as a filter when searching or browsing the 'Company Register'.

