

MY CoC

Complete software guide

Check.
Verify what is registered.

Issue.
Capture and sign
certificates.

Manage.
Run work, payments and
oversight.

For the public, contractors, insurers, trade authorities and the My CoC team.

Version: September 2026

Important: My CoC shows what is registered in the system. It does not confirm that an installation is safe.

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The same guide is available inside the software from the Help link in every area.

1. Access and two-step verification

Public checks need no account. Every staff area requires a signed-in user and a current six-digit authenticator code.

First sign-in

1. Open the area you need and choose Sign in.
2. Enter your email and password, or choose Continue with Google.
3. Scan the setup image with Google Authenticator, Microsoft Authenticator or a similar app.
4. Enter the newest six-digit code to finish setup.

Later sign-ins

1. Enter your email and password or use Google.
2. Open the authenticator app and enter the current My CoC code.
3. My CoC sends you to the area allowed by your role.

Keep access secure: never share passwords, authenticator codes or API keys. A manager should switch off access immediately when a staff member leaves.

Invite codes

Contractor owners, insurer admins, authority managers and platform super admins can invite staff. The recipient signs in, enters the invite code and joins the correct organisation with the chosen role.

2. Public checks

Anyone can check registered information without signing in. Personal owner details, contractor contact details and full certificate numbers are not shown.

Check a property

1. Open Check a property.
2. Type at least three characters from the street address or erf number.
3. Select the matching suggestion or submit the full search.
4. Review each trade: On file, Needs a new one for a sale, Voided, or None on file.

Check a certificate

1. Open Check a certificate.
2. Scan its QR code, paste the verification link, or enter the certificate number.
3. Compare the trade, masked number, issue date and area with the paper document.
4. Report a suspected fake if the result fails or the information does not match.

A registered result is not a safety guarantee. If there is an immediate hazard, use an appropriately registered professional and the relevant emergency service.

3. Contractor company setup

Complete these items before field staff issue certificates or send financial documents.

Company and registrations

1. Open Overview and complete the company setup.
2. Open Registrations and add each trade registration with its supporting document.
3. Wait for verification. The registration must be active for the trade being issued.
4. Open Serial numbers and confirm numbers have been allocated by the authority. My CoC never invents serial numbers.

Business details

1. Open Business details.
2. Add the trading name, address, email, phone and bank details.
3. If VAT registered, switch VAT on and enter the VAT number. The system uses 15%.
4. Set payment terms, quote validity, document prefixes and footer note.
5. Create reusable Price list items.

Staff

Use Staff to invite team members and control signing rights. Every certificate must be signed by the registered inspector responsible for that work.

4. Issuing one certificate

A certificate may be issued only with an active, verified registration, an unused allocated serial number, and the registered inspector's signature.

1. Open New certificate and choose the correct trade.
2. Find or create the property and add the client details needed for your own records.
3. Complete every required trade field and reading.
4. Capture GPS and the required site photos.
5. Review the information carefully; then the registered inspector signs.
6. Choose Issue certificate. One serial is consumed, and the PDF and QR verification are created.
7. Open the certificate to download or share it.

Corrections

Issued certificates are permanent records. They cannot be edited or deleted. If one is wrong, void it with a clear reason and issue a replacement. The old and new records remain linked in the history.

Before issuing: confirm the property, trade, inspector, readings, photos and serial allocation. Do not issue a draft simply to test the button.

5. Projects, jobs, clients and staff

These tools organise everyday contractor work and larger multi-unit sites.

Projects

1. Create the project and add all units.
2. Prepare the master template for fields shared by the units.
3. Capture each unit's own readings, photos and test result.
4. Review progress and investigate identical-reading warnings.
5. Select only tested units, review the batch, and sign.
6. Download the batch ZIP or use the share option after issuing.

Jobs and clients

Jobs track upcoming, active and finished work. Start a quote from a job and an invoice from a finished job. Clients group their properties and certificate history, while reminders identify electrical records approaching the two-year sale threshold.

Reports

The monthly report summarises completed work and can be downloaded as a spreadsheet or printed. The activity and certificate audit records remain the authoritative history.

6. Quotes, invoices and payments

Contractors can quote, invoice and follow payments without leaving My CoC.

1. Open Quotes and invoices and choose Make a quote or Make an invoice.
2. Choose saved price-list items or add custom lines. Add client details and link the job or certificate where relevant.
3. Check quantities, prices, VAT treatment, issue date, due date and totals.
4. Save a draft while working. Send only when correct; sent documents are locked.
5. Download the PDF, share it on WhatsApp, open it in your email app, or copy the secure client link.
6. A client can accept or decline a quote from the link. Turn an accepted quote into an invoice.
7. Record EFT, cash, card or other payments. Add each part payment separately.
8. Open Money to review unpaid, part-paid, paid and overdue invoices and download the report.

If a sent document is wrong, void it with a reason and make a new one. Payments are not edited; void a mistaken payment with a reason and record the correct payment.

Email status

Direct sending from inside My CoC needs a verified sender address on a domain you own. PDF, WhatsApp, share link and your device's email app work without it.

7. Offline work

The contractor area stores field drafts and photos on the current device and sends queued work when the connection returns.

1. Open the contractor area while online before going to site.
2. Create and save drafts normally. Watch the sync status in the top bar.
3. If the connection drops, keep working and leave the browser data intact.
4. When online again, keep My CoC open while queued work sends in order.
5. Confirm the issued certificate and assigned serial appear after syncing.

Do not clear browser data, uninstall the app or change devices while work is queued. A failed item stays in the queue for review; it is not silently discarded.

Safe offline practice

Charge the device, confirm the correct registration and serial allocation before leaving coverage, and reconnect as soon as practical. Project photos should be confirmed online before final batch issue.

8. Insurer portal

Every insurer search requires a policy or claim reference. Searches and detail requests are logged.

1. Enter the policy or claim reference first.
2. Search by address, erf number or certificate number.
3. Review the per-trade status, issue date, contractor registration at issue and history.
4. Use a claim reference when technical readings or photos are required.
5. Flag suspicious records or add a property to the watch list.
6. Upload a portfolio CSV to produce a bulk status report.

Insurer administration

Insurer admins manage staff and API keys. Copy each new API key immediately because it is shown only once. Store it in a secret manager, rotate it if exposed, and switch off accounts that no longer need access.

Access conditions

The insurer organisation must have active access and a current agreement. Turning access off blocks the portal and API immediately.

9. Authority panel

Authority users are restricted to their assigned trade or trades, and all decisions are recorded.

1. Use Dashboard for issue and void totals, provincial activity, contractor activity and map coverage.
2. Search Certificates to inspect form data, history, photos, GPS and signatures, or export the list.
3. Use Contractors to review registrations, certificate counts, complaints and flags.
4. Investigate public, insurer, staff and automatic fraud flags; record inspections and closure outcomes.
5. Managers upload the official register in Registration sync. Suspended, cancelled or expired registrations are blocked immediately.
6. Managers allocate serial blocks or void unused serials. Existing serials are skipped.
7. Managers invite viewers, investigators and managers from Staff.

Authority actions apply only to the authority's assigned trades. A void or suspension always needs a clear reason.

10. Control room

The My CoC team uses role-based tools. Support, fraud, finance and super-admin staff see only the functions assigned to them.

1. Verification: review contractor registrations and documents.
2. Contractors and Certificates: search records and inspect permanent history.
3. Flags: review automatic and reported concerns.
4. Rules: maintain fraud thresholds and validity rules used by public checks.
5. Addresses: correct details or merge duplicates; related records move to the retained property.
6. Partners and Billing: manage access, agreements, plans, usage invoices and EFT payments.
7. POPIA: record requests, export held information and manage retention periods.
8. Support: reply to and close tickets.
9. Team: invite staff and assign platform roles.

View as user is read-only, requires a reason and is logged. Use it only for a genuine support need.

Automatic fraud checks

The system can flag high daily issuing, GPS distance, reused photos, identical unit readings and registration problems. A flag is a review signal, not a final finding.

11. Privacy, support and daily operations

My CoC minimises public information and keeps audit records for sensitive activity.

Privacy

Use Privacy and your information to submit or track a POPIA request. The control-room team records deadlines, finds relevant information and manages retention settings.

Support

Use Contact support for help. Replies are stored in the system. Until a sender domain is configured, staff must also contact the requester through their normal email service when necessary.

Daily checklist

1. Review failed sync items and unresolved flags.
2. Check registration expiries and insurer or authority access dates.
3. Follow up overdue invoices and open support or POPIA deadlines.
4. Remove access for departed staff.
5. Review unexpected audit entries and protect all API keys.

12. Owner deployment and backup checklist

My CoC is portable and uses standard application packages, PostgreSQL-compatible migrations and environment variables.

Required settings

Setting	Purpose
VITE_SUPABASE_URL	Browser database and authentication URL
VITE_SUPABASE_PUBLISHABLE_KEY	Browser publishable key
SUPABASE_URL	Server database and authentication URL
SUPABASE_PUBLISHABLE_KEY	Server publishable key
SUPABASE_SERVICE_ROLE_KEY	Server-only privileged operations
QR_TOKEN_SECRET	Signs certificate QR verification tokens
DATABASE_URL	Runs versioned database migrations

Deployment order

1. Provision the backend in a suitable region and configure HTTPS.
2. Set authentication URLs, email confirmation, Google sign-in and two-step verification.
3. Apply every SQL migration in filename order.
4. Create the private certificate-file bucket or apply the supplied seed setup as appropriate.
5. Set all application environment variables and build the server application.
6. Test sign-in, public check, issue, insurer search, authority access and control-room access before opening to users.

Backups

Back up the database and private file storage nightly. Keep encrypted copies in a separate location. Test a restore regularly; a backup is not proven until it can be restored.

13. Troubleshooting and status meanings

Use the checks below before contacting support.

Message or status	What to do
Nothing found	Check spelling and erf format. It may mean no matching property is registered.
None on file	The property exists, but no current record is shown for that trade.
Needs a new one for a sale	The configured rule says a new certificate may be needed for transfer.
Voided	Open the history or ask the issuer about the replacement.
Registration not confirmed	The system cannot confirm an active registration for the issue date.
No serial available	Ask the relevant authority to allocate valid serial numbers.
Two-step code failed	Use the newest code and confirm the phone time is automatic.
Queued offline	Reconnect, leave My CoC open and watch the sync status.
Access denied	Confirm your invite, role, organisation access, agreement and two-step verification.

When asking for help

Include the page you were using, the time, what you expected, and the exact message shown. Do not send passwords, authenticator codes, secret API keys or private client files through an unsecured channel.

For a suspected fake certificate, use the reporting option on the public check so the report enters the investigation workflow.