

FAQs

Frequently Asked Questions

Answers to the most common questions from admins, bookers and delegates.

Check three things: (1) Does the course have a Compliance Type set? (Admin → Courses → edit). (2) Does the booking have a company_id? If not, run `select public.migrate_booking_company_ids();` in Supabase. (3) Was a certificate actually issued? Certificates only issue after the delegate submits course feedback.

Go to Admin → Compliance → Competency Requirements and add at least one requirement for the job role in question. The matrix only shows data for configured job roles.

On first use the caches are empty until the overnight crons run. Run these manually in the Supabase SQL Editor: `select public.compute_customer_health();` `select public.compute_customer_relationship();` `select public.compute_account_opportunities();` `select public.compute_management_alerts();`

Try rephrasing. The AI maps natural language to a fixed catalogue of approved reports. If your question doesn't match any report, the AI offers general advisory guidance instead. Use the quick-prompt buttons on the Management Intelligence dashboard for inspiration.

Two common causes: (1) The delegate hasn't submitted their course feedback yet — the certificate is held until feedback is received. (2) The delegate signed up with a different email address to the one used on the booking — they should sign out and create a new account with the correct email, or ask an admin to update the booking email.

The score equals current records divided by total tracked records. If employees have competency requirements set but no records yet, those count against the score. Records that haven't been entered yet are not included in the calculation.

Either all expiring certificates already have confirmed renewal bookings (good news), or there are no compliance records with expiry dates in the current pipeline window. Adjust the renewal window to 90 or 180 days to see a larger view.

This is the key commercial signal. The organisation's compliance is in good shape but they are not actively engaging with GTS MedOH — certificates may be sourced from other providers. Proactive outreach is recommended before renewals approach.

Those categories are seeded in the database but are inactive, pending the Prospect Sub module. They will activate automatically when that module is deployed — no dashboard changes will be needed.

Yes, temporarily. The platform is using Resend's sandbox sender while DNS setup is pending. Once gtsmedoh.com DNS is moved to Cloudflare and Resend is verified, emails will send from bookings@gtsmedoh.com. Contact your administrator for the DNS migration steps.

Ask the new user to create an account at nurse-training-booking.html. Then Admin → Users → find their name → change role to Admin. They will have full access on next sign-in. Only Superadmins can create other Superadmins.

Yes. Alert thresholds are stored in the `mgmt_alert_rules` table in Supabase. Update the `threshold_value` column for any rule to change when alerts fire. The daily cron picks up the new values automatically.