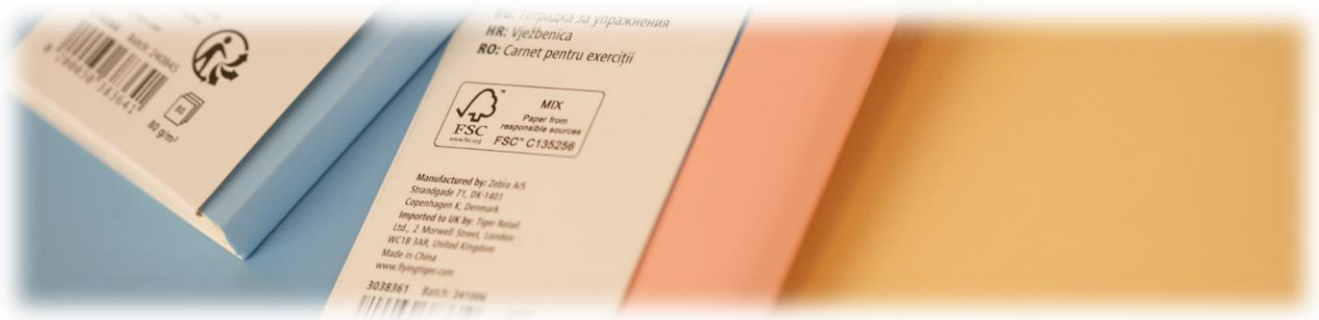


# Forestry Client Portal - Guidance



Welcome to the Soil Association Certification Forestry trademark approval portal.

Certificate holders can use the portal to submit and manage trademark approval requests.

Use the portal to:

- Submit new approvals online
- Respond to amends
- Keep a history of all requests
- Use as your trademark records area for auditing purposes



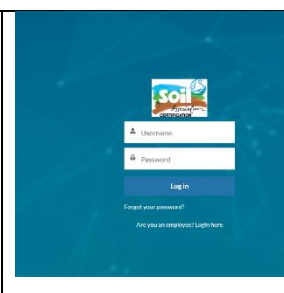
## Contents

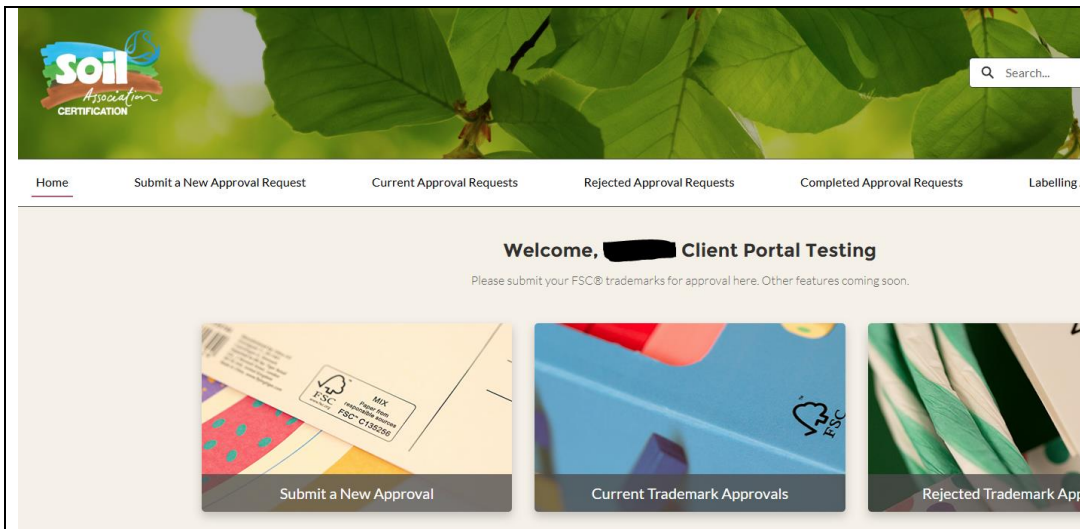
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### 1. Introduction

The Portal has been created initially to allow our customers to submit trademark approvals online and provide a convenient records area for audit purposes. This is the first phase in the development of a wider client portal which is being built to improve the certification experience for our customers. The portal will allow trademark approvals to be managed online, allowing certificate holders to submit new approvals and keep a history of all their requests. We will continue designing more features and improvements as we strive to progress our digital offerings.

### 2. Logging in

<p>You will be provided with a username and password. Your username and password will be sent from <a href="mailto:noreply@salesforce.com">noreply@salesforce.com</a>. Your email system may label it as junk mail or spam.</p> <p>To log in in simply go to <a href="https://soilassociation.my.site.com/clientaccess/s/login/">https://soilassociation.my.site.com/clientaccess/s/login/</a> and submit your username and password.</p> <p>If you need to reset your password, please email <a href="mailto:forestryportals@soilassociation.org">forestryportals@soilassociation.org</a></p>	
<p>This is the trademark approval homepage. There are seven options at the top of the page:</p>	



"Submit a New Approval"

"Current" – a list of requests waiting for approval.

"Rejected" – a list of rejected approvals waiting to be resubmitted.

"Complete" – a list of all completed approvals

"Labelling Agreements" – An area for you to view and upload your labelling agreements

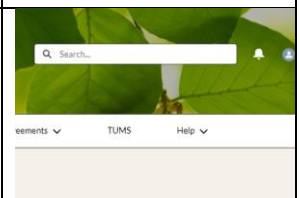
"Special Approvals" – A list of all the approved special approvals

"Help" – a useful area to help with portal questions and problems that you might have.

In the top right of the screen, you will also see a search bar (for finding past approvals quickly).

The **bell symbol** next to this lets you know if you have received any **notifications**. This will show a small red dot next to it if you have received a chatter post – see 6. [Chatter facility](#).

Click on the grey circle with the image of the person if you would like to **log out** of the portal.



### 3. Submitting a trademark for approval

First click on the submit an approval option on the home page.

Here you will be asked whether it is an approval or template approval.

You will be asked also whether it is On-product or for Promotional use.

#### SA TM Approval Submission

- \* Approval Request Type
  - ☒ Approval Request
  - ☐ Template Approval Request
- \* Intended Use ⓘ
  - ☐ Promotional Use
  - ☒ On-Product Use



Next complete the information boxes below. For specific information about labelling agreement details please see section '5. Uploading and submitting a trademark with a labelling agreement'. For specific information about the special approval details please see section '7. Submitting a trademark with a special approval'.

☐ Does the artwork reference an existing labelling agreement? If so, please tick the checkbox and select from this list below.

Your reference or job number <sup>1</sup>

\*Description of submitted artwork <sup>1</sup>

☐ Does the artwork use an approved special approval? If so, please tick the checkbox and select from this list below.

Additional email(s) <sup>1</sup>

☐ I confirm that the correct registration symbol has been used according to the requirements of the FSC's Trademark Registration List

The next screen is the prompt for uploading files

SA TM Approval Submission

Upload Related Files

Or drop files

Please press the Submit Approval button below once you have finished uploading your files. If you are not submitting files with your approval request then just press the Submit Approval button.

At this point you can upload files from your drive, or simply drag the files over to the "Or drop files" prompt.

You can upload more than one file at this point.

Click "submit approval" when finished uploading. If you do not click this, we cannot approve.

Home Submit a New Approval Current Approval Request

SA TM Approval Submission

Upload Related Files

Or drop files

- Please keep your file size below 10 megabytes where possible.
- We cannot accept .ai Illustrator files.
- If artwork is not 1:1 scale please include the dimensions of the FSC label on the artwork.

Once the approval is submitted, one of our staff will check the file and approve or reject. Until then it will appear in the current list.

SUBMIT A NEW APPROVAL CURRENT REJECTED COMPLETED LABELLING AGREEMENTS TUMS

Trademark Approvals  
Current

6 items • Sorted by Trademark Approval Id • Filtered by All trademark approvals - Request Status, Request Type • Updated 11 minutes ago

<input type="checkbox"/>	Trademark Appr... ↑	Client Reference/Job c... ↓	Request Type ↓	Intended Use ↓	Request
1	<input type="checkbox"/> TM-00001	GOBO 9999	Approval Request	On-Product Use	Unassign
2	<input type="checkbox"/> TM-00003	BUSINESS	Approval Request	Promotional Use	Unassign
3	<input type="checkbox"/> TM-00004	123	Approval Request	On-Product Use	Unassign
4	<input type="checkbox"/> TM-00005	213	Approval Request	On-Product Use	Under R
5	<input type="checkbox"/> TM-00006	123	Approval Request	On-Product Use	Unassign
6	<input type="checkbox"/> TM-00007	12345	Approval Request	On-Product Use	Unassign



Once checked an email will be sent to the registered email address, with the approval decision.

If approved the approval request will be moved to the completed tab, if rejected it will appear in the rejected tab.

Dear

Your reference or job code: 123SA456

Thank you for sending your FSC trademark artwork for approval. I can confirm that the proposed use of the FSC trademark meets the requirements of the FSC Trademark Standard 50-001 v2.0.

Please ensure you retain access to this portal to evidence confirmation of our approval.

Best wishes

Simon Flinn

Soil Association Certification  
Tel +44 (0)117 9142435  
[www.soilassociation.org/forestry](http://www.soilassociation.org/forestry)



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Forest Management  
and Chain of Custody Certification



## 4. Resubmitting a rejected approval

If your trademark is rejected, you will receive an email which will contain reasons for rejection.

The approval will also appear in the rejected list.

Dear

Your reference or job code: 12345

Unfortunately, the trademark use submitted cannot be approved according to the requirements of the FSC Trademark for the following reason(s): NB: The clause number relates to v2.0 of the FSC Trademark Standard 50-001.

1. The trademark registration symbol ® needs to be included after the initials FSC. (1.4)

Please amend and resubmit the artwork for approval. As we work on a rota system of Trademark Approvers, please upload your changes and respond within the portal so that it is clear what issues need resolving.

Best wishes

Simon Flinn

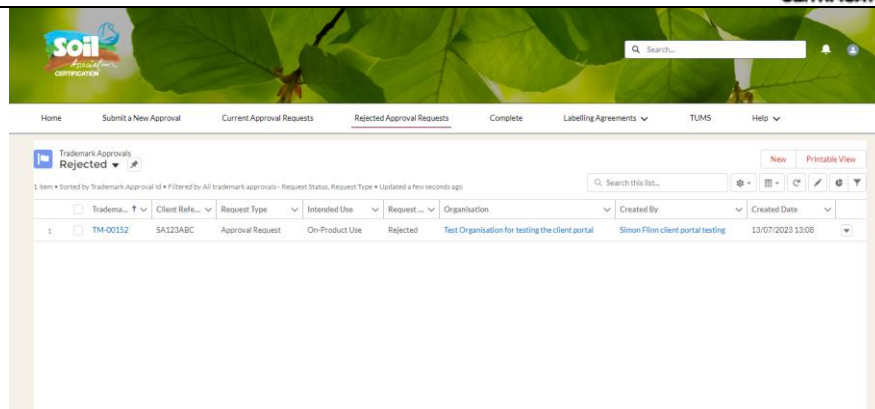
Soil Association Certification  
Tel +44 (0)117 9142435  
[www.soilassociation.org/forestry](http://www.soilassociation.org/forestry)



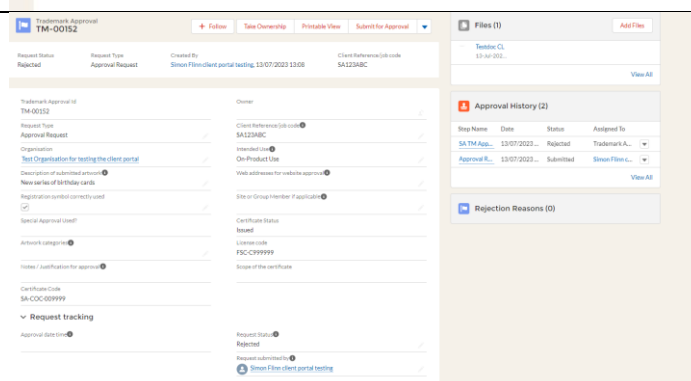
**Expert | Efficient | Effective**

Forest Management

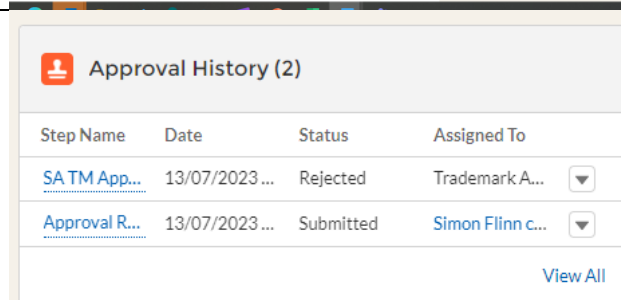
The rejected trademark request, will appear in the rejected list



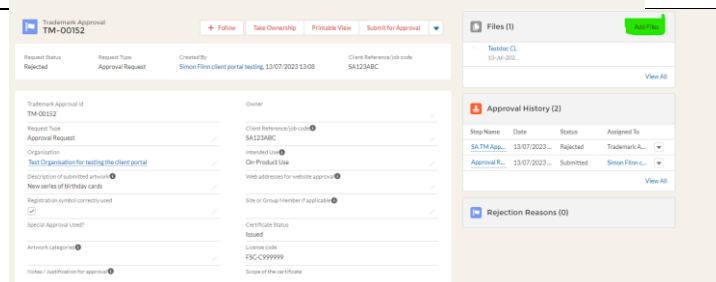
If you click on the submission you would like to change it will take you approval record.



You can review the approval history by clicking "view all." This will show any submission and approver comments including reasons for rejection.

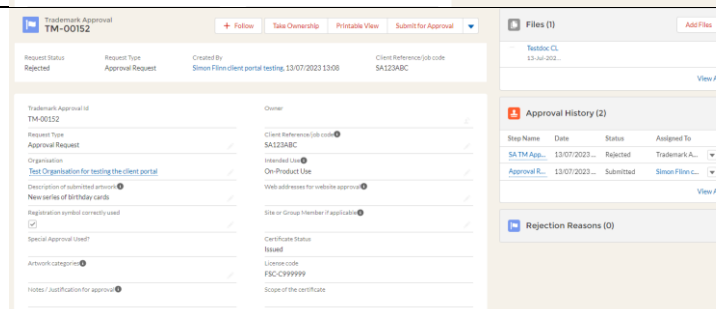


To resubmit Click on "add files" and reupload the amended trademark.



Once new file(s) uploaded click Submit for approval.

A comments box will appear, please write that you have re-uploaded the amended file for approval. The original file will remain in the folder.



Once you have finished your amendments, click the Submit for Approval button.

[rship](#)
[Printable View](#)
[Submit for Approval](#)

Files (1)

Testdoc CL  
13-Jul-202...

Client Reference/Job code  
SA123ABC

2023 13:08

Approval

## 5. Uploading and submitting a trademark with a labelling agreement

The portal allows you to upload and view your own labelling agreements.

To upload a new labelling agreement, select "create labelling agreement" from the drop-down menu.

Search...

[quests](#)
[Complete](#)
[Labelling Agreements](#)
[TUMS](#)
[Help](#)

All Labelling Agreements

Create Labelling Agree...

Flinn client portal test

for approval here. Other features coming soon

Click on the red button on the next screen.

TM - Labelling Agreement Flow

Click the button below to create a Labelling Agreement record.

Create Labelling Agreement

Then complete the small form.

TM - Labelling Agreement Flow

License code

Date of Agreement

Name of other party

Other party certification code

Are you acting as supplier or buyer?

Who is responsible for approving TM Use?

Notes

Labelling agreement file upload

Upload Files Or drop files

- PDF is the preferred file format.
- Please keep your file size below 10 megabytes where possible.
- We cannot accept .ai Illustrator files.

Finally upload the agreement

--None--

Notes

Labelling agreement file upload

Upload Files Or drop files

- PDF is the preferred file format.
- Please keep your file size below 10 megabytes where possible.
- We cannot accept .ai Illustrator files.


To submit a trademark request with a labelling agreement, go to the tab 'Submit a New Approval Request'.

Home

Submit a New Approval Request


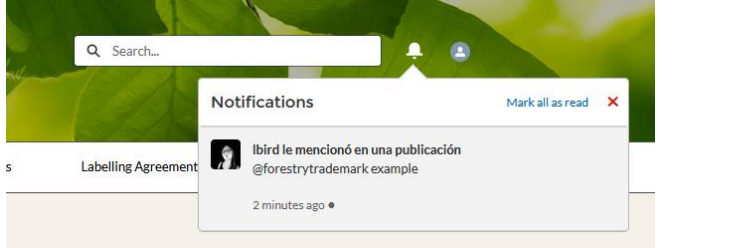
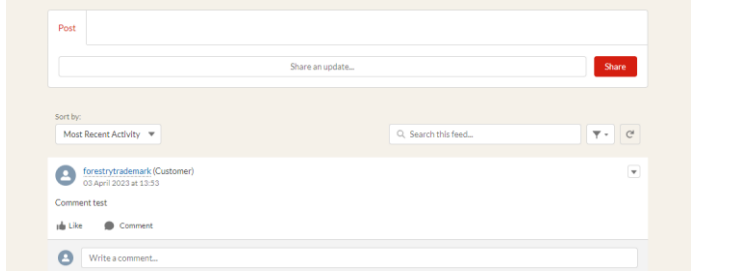
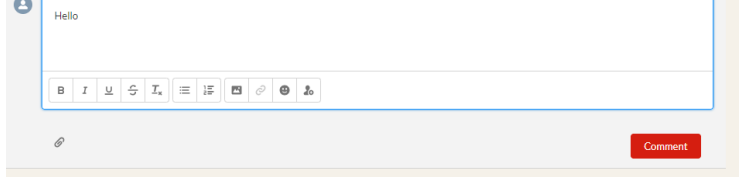
SA TM Approval Submission



<p>Click on the tick box 'Does the artwork reference an existing labelling agreement?', select the labelling agreement related to the trademark request.</p>	<p><b>* Intended Use</b></p> <p><input type="radio"/> Promotional Use</p> <p><input checked="" type="radio"/> On-Product Use</p> <p><input checked="" type="checkbox"/> Does the artwork reference an existing labelling agreement? If so, please tick the checkbox and select from this list below.</p> <p>* Does the artwork reference an existing labelling agreement?</p> <p>--None--</p> <p>--None--</p> <p>Not Applicable</p> <p>LA-00132 - TESTING</p> <p>LA-00139 - TESTING</p>
<p>In the next screen you can add the files related to your trademark request and follow the rest of the trademark request process just as you would do it for a normal trademark request (see '3. Submitting a trademark for approval').</p>	<p><b>SA TM Approval Submission</b></p> <p>Upload Related Files</p> <p> <b>Upload Files</b> Or drop files</p> <ul style="list-style-type: none"> <li>• PDF is the preferred file format.</li> <li>• Please keep your file size below 10 megabytes where possible.</li> <li>• We cannot accept .ai Illustrator files.</li> <li>• If artwork is not 1:1 scale please include the dimensions of the FSC label on the artwork.</li> </ul>


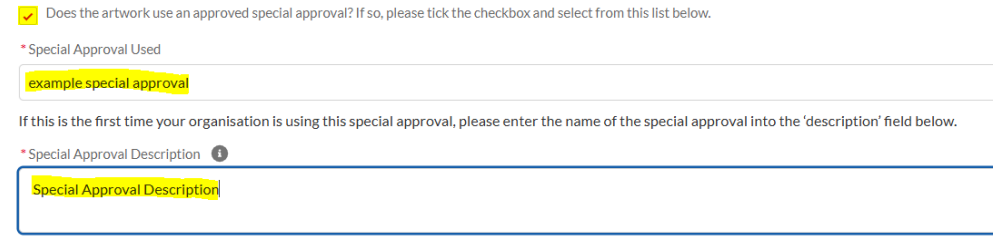
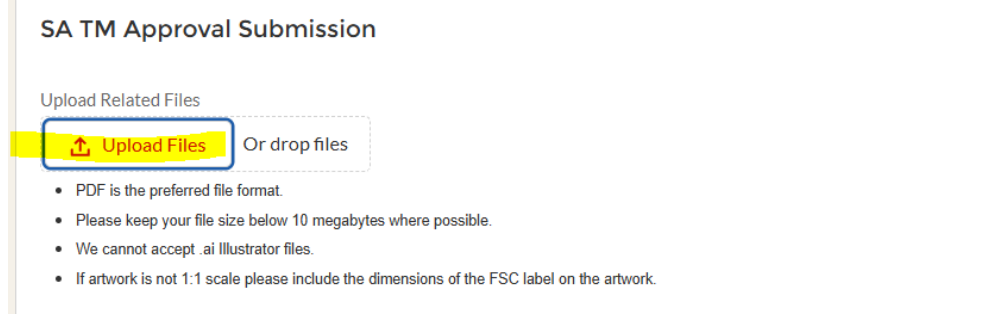
## 6. Chatter facility

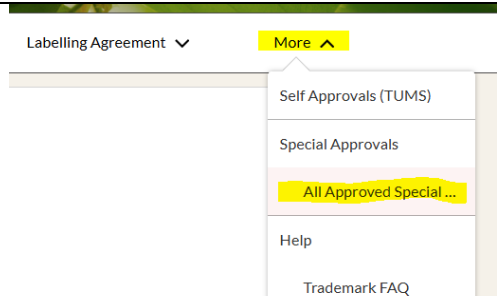
Occasionally there might be the need for one of our Trademark approvers to ask a question about an approval request before approving or rejecting. To allow you to respond in the portal, each approval now has a chatter object attached to it. Below lets you know when you receive a chatter response and how you can deal with it.

<p>When you receive a notification, of a chatter question you will receive an email notification, and the bell will have red dot on the home screen.</p>	
<p>Clicking on the bell will show you a drop down of your notifications. If you click on the notification, it will take you to the approval record.</p>	
<p>On the approval record any question will appear on the Chatter object at the bottom of the page.</p>	
<p>To respond simply click on "write a comment." Write your reply and then click the red comment button.</p>	

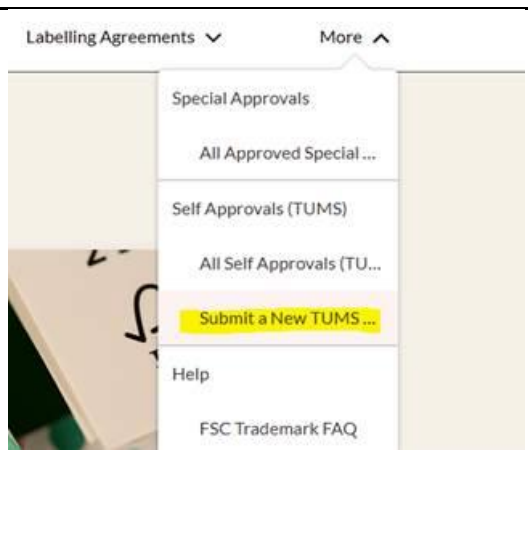



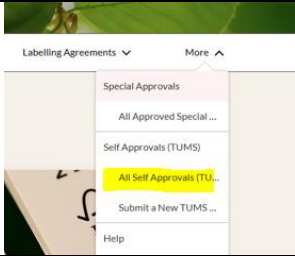

## 7. Submitting a trademark with a special approval

<p>To submit a trademark request with a special approval, go to the tab 'Submit a New Approval Request'.</p>	 <p>Home <b>Submit a New Approval Request</b></p> <p>SA TM Approval Submission</p>
<p>Click on the tick box 'Does the artwork use an approved special approval?', select the special approval related to the trademark request.</p>	 <p><input checked="" type="checkbox"/> Does the artwork use an approved special approval? If so, please tick the checkbox and select from this list below.</p> <p>* Special Approval Used</p> <p>example special approval</p> <p>If this is the first time your organisation is using this special approval, please enter the name of the special approval into the 'description' field below.</p> <p>* Special Approval Description ⓘ</p> <p>Special Approval Description</p>
<p>If this is the first time your organisation is using this special approval, you need to enter the name of the special approval into the field 'Special Approval Description'. If there isn't already an approved special approval recorded in our system for this trademark request, please select 'New special approval'. You will need to add the detail of the new special approval you would like us to record.</p>	 <p><input checked="" type="checkbox"/> Does the artwork use an approved special approval? If so, please tick the checkbox and select from this list below.</p> <p>* Special Approval Used</p> <p>New special approval (add detail to description field)</p> <p>If this is the first time your organisation is using this special approval, please enter the name of the special approval into the 'description' field below.</p> <p>* Special Approval Description ⓘ</p> <p>New Special Approval Name - Special Approval Details</p>
<p>In the next screen you can add the files related to your trademark request and follow the rest of the trademark request process just as you would do it for a normal trademark request (see '3. Submitting a trademark for approval').</p>	 <p>SA TM Approval Submission</p> <p>Upload Related Files</p> <p><b>Upload Files</b> Or drop files</p> <ul style="list-style-type: none"> <li>PDF is the preferred file format.</li> <li>Please keep your file size below 10 megabytes where possible.</li> <li>We cannot accept .ai Illustrator files.</li> <li>If artwork is not 1:1 scale please include the dimensions of the FSC label on the artwork.</li> </ul>

<p>To see all your approved special approvals, go to the tab 'More' and select 'All Approved Special Approvals'.</p>	
--	---

## 8. Submitting a self-approval TUMS request

<p>To submit a Self-Approval TUMS request, go to the tab 'Submit a New TUMS Request'.</p>	
<p>Complete the fields as best as you can. The 'TUMS Type' and 'Name of management representative' are mandatory fields.</p>	<p><b>SA TUMS Approval Submission</b></p> <p>Please fill in the fields below to create a TUMS approval:</p> <p>* TUMS Type: <input type="text" value="--None--"/></p> <p>Does the organisation have a good track record of using the FSC trademarks for the scope of the TUMS? <input type="text" value="--None--"/></p> <p>* Name of management representative with overall responsibility for the TUMS: <input type="text"/></p> <p>Do you have an adequate and up-to-date documented TUMS procedures in place? <input type="text" value="--None--"/></p> <p>If appropriate, are other personnel defined as being responsible for the implementation of each procedure? <input type="text" value="--None--"/></p> <p>Name(s) of company's internal trademark approver(s) <input type="text"/></p> <p>Have relevant staff been trained in the up-to-date version of the procedures? <input type="text" value="--None--"/></p> <p>Evidence that internal trademark approver(s) have been trained on FSC Trademark use: <input type="text" value="--None--"/></p>

<p>The second screen is for you to upload as many evidence documents as you can. These documents will be used by our Approval team to assess your application.</p>	<h3>SA TUMS Approval Submission</h3> <p>Please attach any evidence you can provide:</p> <ul style="list-style-type: none"> <li>• Evidence of your personnel trained on FSC trademark use</li> <li>• Evidence of your personnel being trained on your own internal procedure</li> <li>• Evidence of a good track record of using FSC trademarks</li> <li>• Evidence of an up-to-date documented TUMS procedure in place</li> </ul> <p>NB: a certificate from the FSC online Trademark Training course for Certificate Holders is recommended.</p> <p>Upload Related Files:</p> <div>  <a href="#">Or drop files</a> </div> <ul style="list-style-type: none"> <li>• PDF is the preferred file format</li> <li>• Please keep your file size below 10 megabytes where possible</li> </ul>
<p>To see your recent TUMS record request, go to the tab 'More' and select 'All Self Approvals'. Then select your TUMS record.</p>	
<p>If we need you to provide more required documents, you will receive an email which will describe the documents we require.</p> <p>Your TUMS record will also show the status 'Additional information required'.</p> <p>You can add more required documents from the Files section on the top right of your TUMS record.</p> <p>You can also update the 'Management representative' and 'Internal trademark approvers names' as needed. Once your record is amended click on 'Submit for Approval' for our approver team to assess your request.</p>	<p>Dear [REDACTED]</p> <p>Thank you for sending your TUMS request for approval. Unfortunately in order to approve we require additional information.</p> <p>Please amend and resubmit the TUMS for approval.</p> <p>Follow the link below to respond within the portal</p> <p>[REDACTED]</p> <h3>Request Tracking</h3> <p>Status</p> <p>Additional information required</p> <div> <p> <b>Files (1)</b> <a href="#">Add Files</a></p> <div> <p>[REDACTED]</p> <p>[REDACTED] • 25KB • pdf</p> <p><a href="#">View All</a></p> </div> </div> <div> <a href="#">Submit for Approval</a> <a href="#">Printable View</a> </div> <p>Organisation Cert Number</p> <p>[REDACTED]</p> <p>FSC Licence</p> <p>[REDACTED]</p> <p>Management representative for TUMS ⓘ</p> <p>[REDACTED]</p> <p>Internal trademark approver names ⓘ</p> <p>[REDACTED]</p>

When your TUMS request is approved you will receive an email with all data related to your TUMS request. You can keep this email for your own records.

Dear [REDACTED] Client,

Thank you for sending your TUMS request for approval. I can confirm that it meets the requirements of the FSC Trademark Standard 50-001 v2.1.

Please ensure you retain access to this portal to evidence confirmation of our approval.

Follow the link below to see your approval within the portal:

[REDACTED]

- Date: [REDACTED]
- Organisation Name: Test Organisation [REDACTED]
- Certificate Code: [REDACTED]
- FSC licence code: [REDACTED]

- Scope of TUMS: On-Product
- Does the organisation have a good track record of using the FSC trademarks for the scope of the TUMS? Yes
- Name of management representative with overall responsibility for the TUMS: [REDACTED]
- Are adequate and up-to-date documented TUMS procedures in place? (Eg.The procedure, the manual): Yes
- If appropriate, are other personnel defined as being responsible for the implementation of each procedure? Yes
- Have relevant staff been trained in the up-to-date version of the procedures? Yes
- Name(s) of company's internal trademark approver(s): [REDACTED]
- Evidence that internal trademark approver(s) have been trained on FSC Trademark use: Yes