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
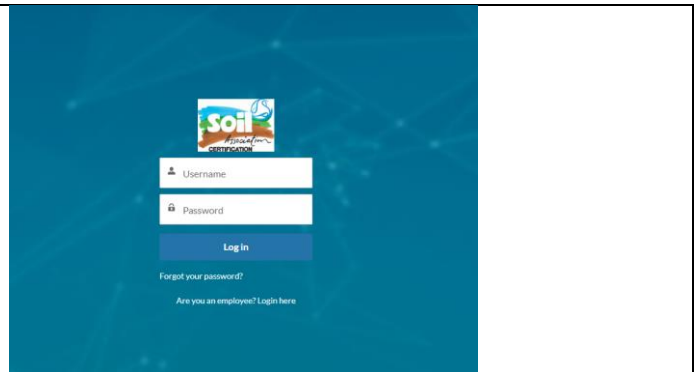
Contents

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

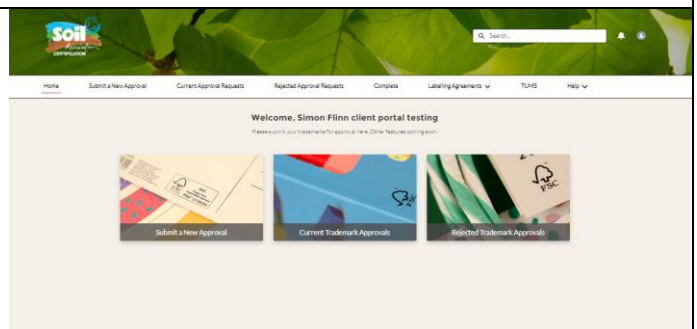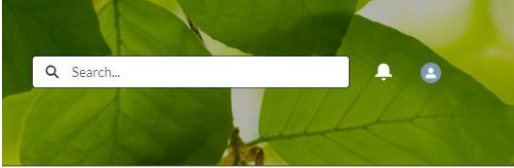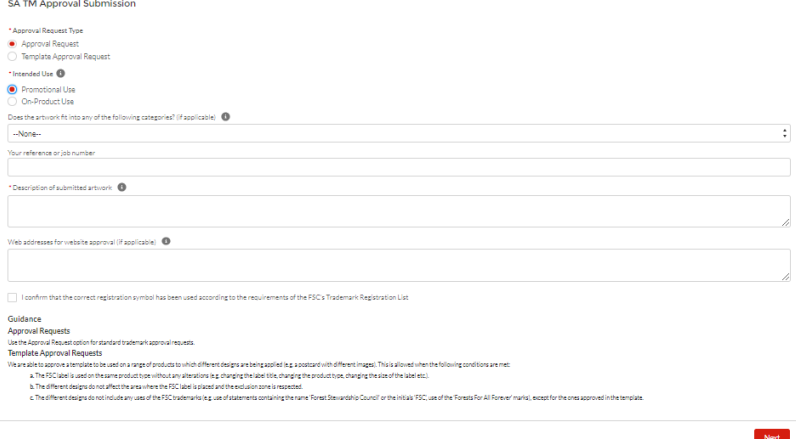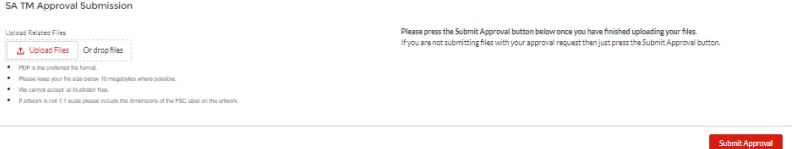|	
You will be provided with a username and password. Your username and password will be sent from noreply@salesforce.com. Your email system may label it as junk mail or spam. To log in in simply go to https://soilassociation.my.site.com/clientaccess/s/login/ and submit your username and password. If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

"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.	Q Search... 🔔 👤 eements ⌄ TUMS Help ⌄

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.	SA TM Approval Submission * Approval Request Type 🔘 Approval Request ⚪ Template Approval Request * Intended Use ⓘ 🔘 Promotional Use ⚪ On-Product Use Does the artwork fit into any of the following categories? (if applicable) ⓘ --None-- Your reference or job number * Description of submitted artwork ⓘ Web addresses for website approval (if applicable) ⓘ ☐ I confirm that the correct registration symbol has been used according to the requirements of the FSC's Trademark Registration List **Guidance** **Approval Requests** Use the Approval Request option for standard trademark approval requests. **Template Approval Requests** We are able to approve a template to be used on a range of products to which different designs are being applied (e.g. a postcard with different images). This is allowed when the following conditions are met: a. The FSC label is used on the same product type without any alterations (e.g. changing the label title, changing the product type, changing the size of the label etc.) b. The different designs do not affect the area where the FSC label is placed and the exclusion zone is respected. c. The different designs do not include any uses of the FSC trademarks (e.g. use of statements containing the name 'Forest Stewardship Council' or the initials 'FSC', use of the 'Forests For All Forever' marks), except for the ones approved in the template. **Next**
The next screen is the prompt for uploading files	SA TM Approval Submission Upload Related Files Please press the Submit Approval button below once you have finished uploading your files. ⬆ Upload Files Or drop files If you are not submitting files with your approval request then just press the Submit Approval button. • PDF is the preferred file format. • 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. **Submit Approval**

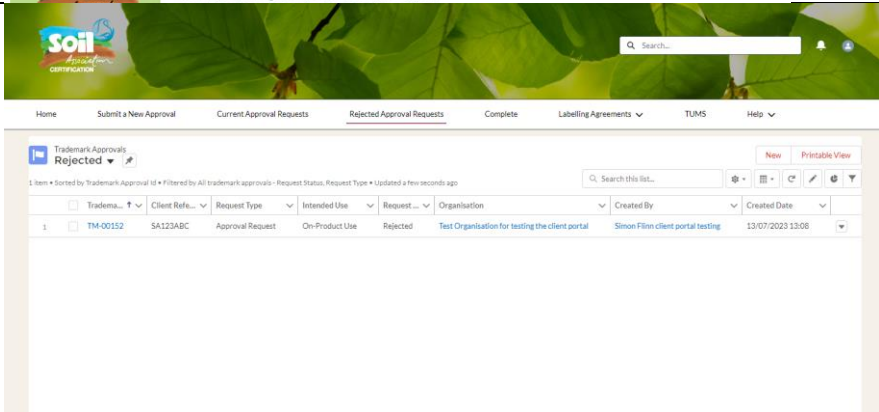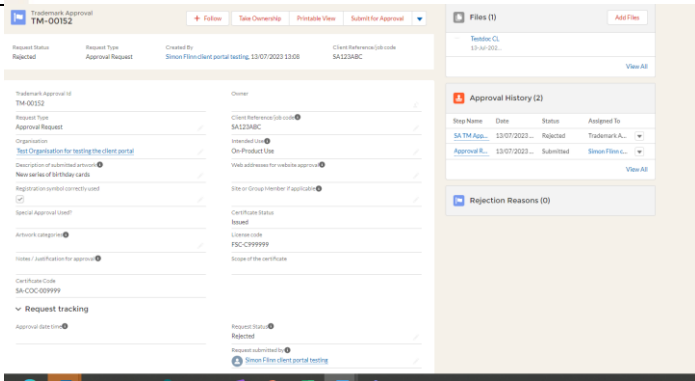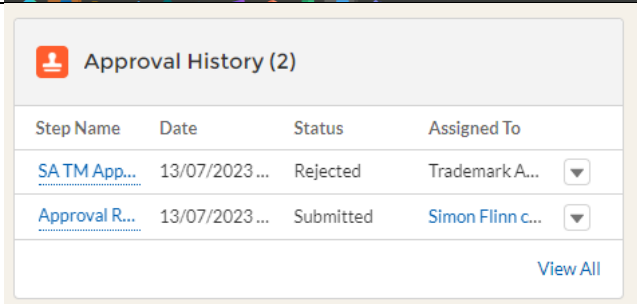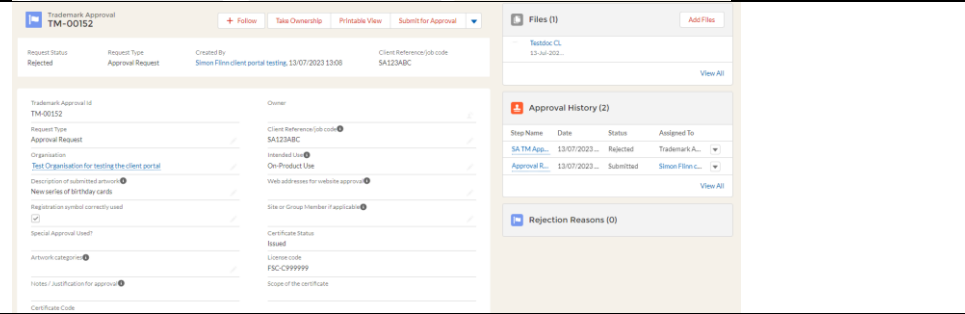| At this point you can upload files from your drive, or simply drag the files over to the "Or drop files" prompt. You can upload more than one file at this point. Click "submit approval" when finished uploading. If you do not click this, we cannot approve.	**SA TM Approval Submission** Upload Related Files 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. • 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 ▾ 8 items • Sorted by Trademark Approval Id • Filtered by All trademark approvals - Request Status, Request Type • Updated 11 minutes ago |	Trademark Appr... ↑ ∨	Client Reference/job c... ∨	Request Type ∨	Intended Use ∨	Request
1	TM-00001	GOBO 9999	Approval Request	On-Product Use	Unassig
2	TM-00003	BUSINESS	Approval Request	Promotional Use	Unassig
3	TM-00004	123	Approval Request	On-Product Use	Unassig
4	TM-00005	213	Approval Request	On-Product Use	Under R
5	TM-00006	123	Approval Request	On-Product Use	Unassig
6	TM-00007	12345	Approval Request	On-Product Use	Unassig	
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 **Expert | Efficient | Effective** Forest Management and Chain of Custody Certification Forestry soilassociation.org/forestry

4. Resubmitting a rejected approval

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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 **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.	

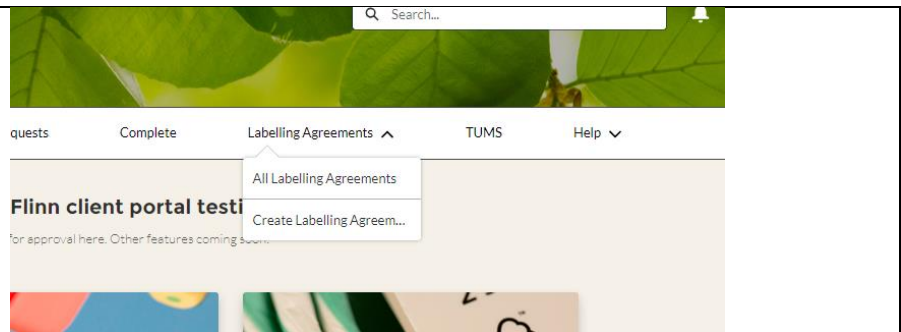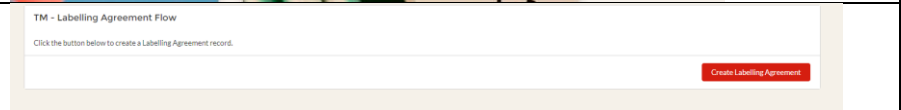|	
To resubmit Click on "add files" and reupload the amended trademark.	
Once new file(s) uploaded click Submit for approval. A comments box will appear, please write that you have re-uploaded the amended file for approval. The original file will remain in the folder.	
Once you have finished your amendments, click the Submit for Approval button.	
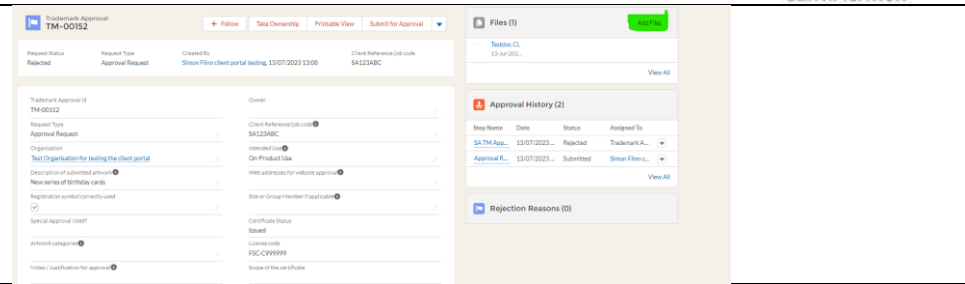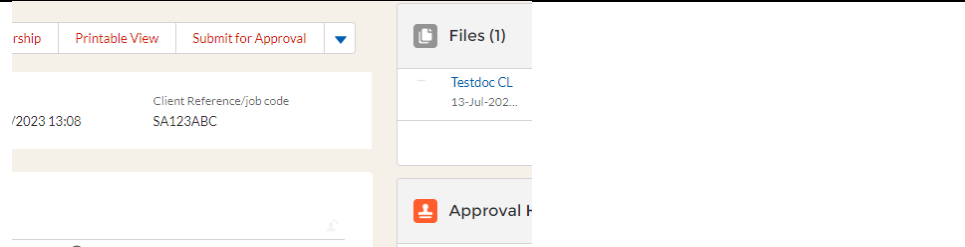
5. Uploading to labelling agreements to the portal
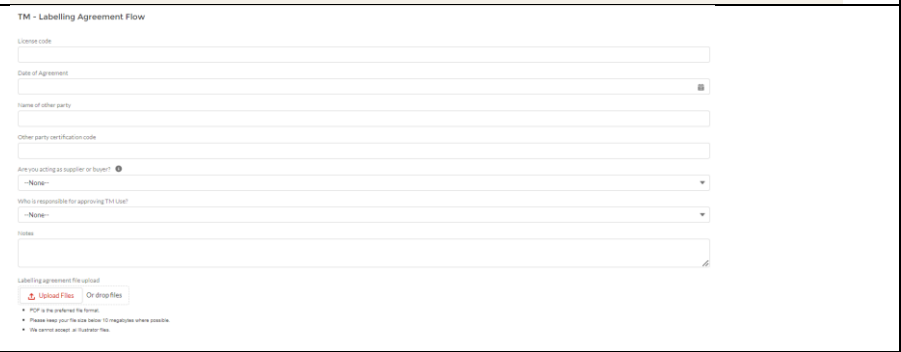
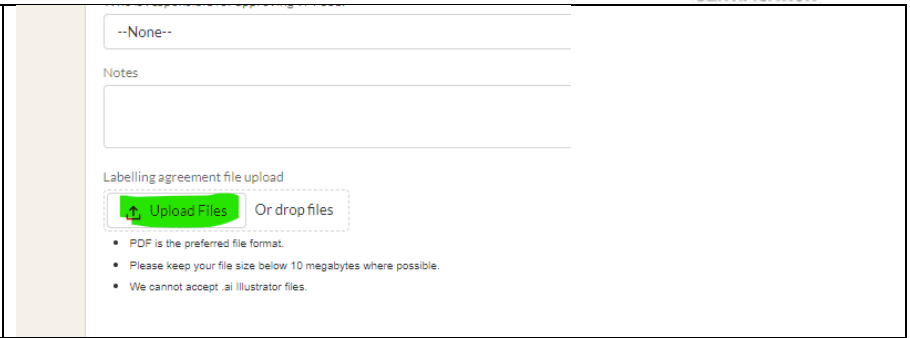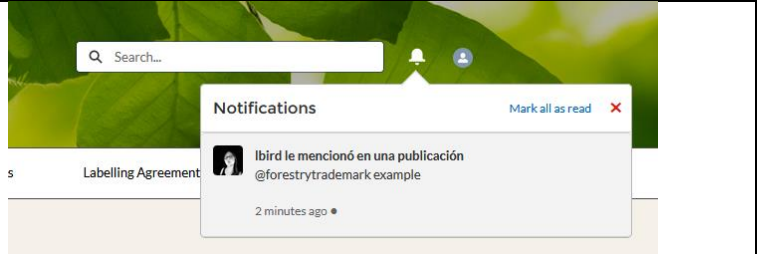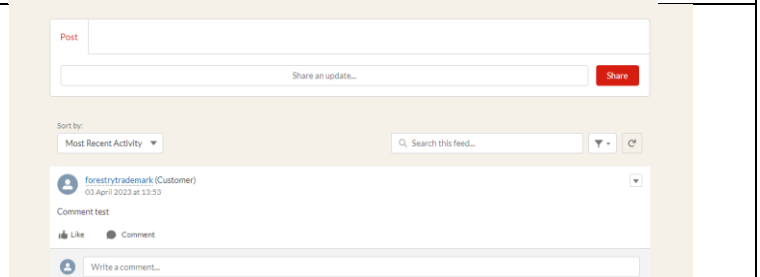|	
The portal now allows you to upload and view your own labelling agreements. To upload a new labelling agreement, select "create labelling agreement" from the drop-down menu.	
Click on the red button on the next screen.	
Then complete the small form.	

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.

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.

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.	Q Search... 🔔¹ 👤
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.	Q Search... 🔔 👤 Labelling Agreement **Notifications** Mark all as read ✕ Ibird le mencionó en una publicación @forestrytrademark example 2 minutes ago ●
On the approval record any question will appear on the Chatter object at the bottom of the page.	Post Share an update... **Share** Sort by: Most Recent Activity ▼ 🔍 Search this feed... ▼· C forestrytrademark (Customer) 03 April 2023 at 13:53 Comment test 👍 Like 💬 Comment 👤 Write a comment...
To respond simply click on "write a comment." Write your reply and then click the red comment button.	👤 Hello B I U S Tₓ ≡ ≔ 🖼 🔗 😊 👤 📎 **Comment**