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
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 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.

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.

Next complete the information boxes below.

The next screen is the prompt for uploading files.
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.

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.

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.
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.

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.
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.
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.

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.

On the approval record any question will appear on the Chatter object at the bottom of the page.

To respond simply click on “write a comment.” Write your reply and then click the red comment button.