

SALESFORCE CUSTOMER PORTAL USER GUIDE

July 2023

Introduction

Welcome to the members portal user guide. We are undergoing lots of updates to make the portal work as conveniently for you as possible. We understand that going digital means a big change in how you deal with and process your RSPCA Assured membership, but we are here to help you every step of the way.

How do I log on to the portal?

To log in, please <u>click here</u> and enter your Username and Password. If you have not logged in before or are having any difficulties please contact Membership Services.





How do I view my certificate?

To view the certificate for a site please visit the homepage. Then, click on the **'Download Site Certificates'** button on the right-hand side of the screen.

| Home | Site Accounts | Site Units | Site Assessments | Contacts | Help | | | 🐥 (🕘 Vanessall Ellott |
|--|--|---------------------|------------------------------|---|--|---|---------|----------------------------|
| | | | We are undergoi | ng lots of updai | es to make the • Site Units a acts Page whe To download | Welcome to the Members Portal protal work as conveniently for you as possible. We have added some helpful new features including: • Site Accounts Page to view all of your sites of Site Assessments Pages can be viewed and downloaded via a report are you can edit, add or delete Contacts that are associated with your membership your certificates, you can continue to do this from the Home Page | | |
| Phone Acce | ount mber Portal Test A Websile | CCOUNT - Head Offic | C e Parent Account | | | | + Falaw | Download Site Certificates |
| ✓ Memil Account Ni Member P Aliss 6000 Primary Cc Primary To | me offal Test Account - Hear mark Full Name est Name (5000) Test Su | Head Office | | Account Ro Head Offic Active I | cord Type e | | | |
| | | | | | | | | |

Then select the certificates you would like to download and they will automatically appear in your download folder.

Download Site Certificates

+ Follow



How do I view my site accounts?

Click on the **'site accounts'** button on the navigation bar.

| Home | Site Accounts Site Unit | s | Site Assessments | Contacts | Help | | | | | | Q 📮 🙆 Vanes | ssa11 Elliott |
|-----------|---|---------------|----------------------|------------------|--------------------------|----------------------------|--------------------------|------------------|---------------------------|------------|--------------------|---------------|
| | | | | | Site | Accounts for your me | embership | | | | | |
| | | | | Below is a | list of all of the sites | and their status and addre | ess details that we hold | d on our system. | | | | |
| | | | | To | make any changes to | the site addresses please | e contact Membership | Services | | | | |
| Accounts | s | | | | | | | | | | | |
| 7 items • | Sorted by Account Name • Filtered by All accounts | • Updated a f | lew seconds ago | | | | | | | | | Ci |
| | Account Name 1 | ~ | Membership Nu \vee | Account Record V | Status V | Billing Street 🕈 🛛 🗸 | Billing City V | County ~ | Billing Zip/Postal \vee | Region ~ | Last Modified Date | \sim |
| 1 | Member Portal Test Account - Head Office | | | Head Office | MEMBER | Parkside | Horsham | West Sussex | RH12 1GY | South East | 07/06/2023 12:29 | V |
| 2 | Portal Demo Site 1 | | 6000.0006 | Site | MEMBER | Farm 1 | Oxfordshire | Oxfordshire | OX1 10X | South East | 06/06/2023 17:22 | • |
| 3 | Portal Demo Site 2 | | 6000.0013 | Site | MEMBER | Station Road | Portsmouth | Berkshire | P09 9P0 | South East | 06/06/2023 17:20 | V |
| 4 | Portal Demo Site 4 | | 6000.0014 | Site | MEMBER | The Manor Farm | Norfolk | | IP postcode | | 07/06/2023 12:01 | |
| 5 | Portal Demo Site 5 | | 6000.0009 | Site | MEMBER | The Hatchery | London | Greater London | postcode | London | 07/06/2023 12:02 | V |
| 6 | Portal Demo Site 6 | | 6000.0015 | Site | MEMBER | Castle Farm | Horsham | West Sussex | postcode | South East | 07/06/2023 12:29 | |
| 7 | Portal Demo Site Haulier | | 6000.0016 | Site | MEMBER | Big Road Farm | Oxon | | OX1 10X | | 06/06/2023 17:23 | |
| | | | | | | | | | | | | |

All Site Accounts

Here, you will see all the sites that are associated with you. You can see their status and the site details that we hold on our system.

To make any changes to site addresses please contact Membership Services via email: <u>help@rspcaassured.org.uk</u>.



How do I view my site units?

Click on the 'Site Units' button on the navigation bar.

| Home | Site Accounts | Site Units | Site Assessments | Contacts | Help | ۹ | 💄 🕒 Vanessa 11 Eliott |
|------|---------------|------------|------------------|-------------------|---|---|-----------------------|
| | | | | | Click on the REPORT button below to see units for your sites | | |
| | | | | The report allows | you to review the status of the unit, and see all of the information that we hold on our system for it. | | |
| | | | | | If you have a haulier membership you can view the vehicle details here. | | |
| | | | | | Report | | |
| | | | | | X | | |

Then click on the Report button in the middle of the screen.

This report allows you to review the status of the unit, and see all of the information that we hold on our system for it.

If you have a haulier membership you can also view the vehicle details here.

Please note the description field is shown on your certificates. To **export your report to an Excel format**, click on the **'export'** button on the right hand side of your screen.

| Beport: Accounts with Sprint 4 Units R | units eport | | | | | | | | | 🖌 Enable F | leid Editing Q | 🍪 Add Cha | n T C | Export |
|---|--------------------------|----------------------|----------------|--------------------------------|-------------|---------------------|---------------------|------------|-----------------------|--------------|------------------|-------------|----------------|---------------|
| Report to show key Unit info | mation for each Members | hip. Give members th | e option to do | whicad to a CSV file. | | | | | | | | | | |
| Total Records Total Numb 52 30,400 | ar of Animais | | | | | | | | | | | | | |
| Membership Number 🔶 💌 | Account Name | Unit: Unit Number 💌 | Status 💌 | Description | Animals 💌 | List of Animais | Number of Animals 💌 | Business 💌 | Production | House Type 💌 | Rearing System 💌 | Slap Mark 💌 | Vehicle Type 💌 | Vehicle Regis |
| 1111.0005 (1) | Portal Demo Site 1 | 01 | Certified | Brood Unit | Turkeys | Meat Chicken Chicks | 10,000 | Producer | Brood | Mobile | | | | |
| ubtotal | | | | | | | 10,000 | | | | | | | |
| 1111.0009 (2) | Portal Demo Site 5 | 01 | Certified | Turkey Unit | Turkeys | Meet Chicken Chicks | 0 | Producer | Breeding | Mobile | Indoor | | | |
| | Portal Demo Site 5 | 02 | Certified | Turkey Poults | Pullets | Chickens | 20,000 | Producer | Producer | • | Indoor | | TBC | WN71 OGK |
| ubtotal | | | | | | | 20,000 | | | | | | | |
| 1111.0013 (1) | Portei Demo Site 2 | 012 | Certified | Hatchery Unit | List | Meat Chicken Chicks | 0 | Hatchery | Hatchery | | | | | |
| ubtotal | | | | | | | 0 | | | | | | | |
| 1111.0014 (2) | Portal Demo Site 4 | 01 | Certified | Pig Breeding to Finishing Unit | Pigs | Meat Chicken Chicks | 250 | Producer | Breeding to finishing | | Pasture | 0011111 | | |
| | Portal Demo Site 4 | 02 | Applying | Beef Cattle Unit | Boof Cattle | | 50 | Producer | Calves | | Indoor | 009999 | | |
| ubtotal | | | | | | | 300 | | | | | | | |
| 1111.0015 (2) | Portal Demo Site 6 | 01 | Certified | Sheep Unit | Sheep | Meat Chicken Chicks | 100 | Producer | Producer | | Outdoor Reared | | | |
| | Portal Demo Site 6 | 02 | Applying | Haulier | | Sheep | | Haulier | Haulier | | | | Lony | AAA BBBB |
| ubtotal | | | | | | | 100 | | | | | | | |
| 1111.0016 (44) | Portal Demo Site Hauller | 01 | Certified | Hatchery Hauller | List | Meet Chicken Chicks | 0 | Haulier | Haulier | | | | TBC | |

| 💉 Enable Field Editing | Q | 🚷 Add Chart | Ŧ | C | Export |
|------------------------|---|-------------|---|---|--------|



How do I view my assessment information?

Click on the 'site assessments' button on the navigation bar.

| Home | | Site Assessments | | | Q 📮 🙆 Vanessa11 Elliott |
|------|--|------------------|---------|---------------------|--|
| | | | | Click on the | REPORT button below to see assessments for your sites |
| | | | You can | view details of all | assessments that have taken place, as well as if you have an assessment due. |
| | | | | | Report |
| | | | | | |
| | | | | | |

The report shows you assessment information per site, including the allocated assessor and dates of the assessment. It includes all assessments that have taken place, as well as if you have an assessment due.

The assessment status can be one of the following:

- > Awaiting payment (invoice has been issued or in progress)
- > Awaiting appointment date (assessment to be booked when it is due)
- > Awaiting assessment (assessment scheduled and waiting to take place)
- > Awaiting certification (assessment taken place & now in technical review)
- > Certified (assessment complete and approved by our Certification Body)

To export your report to an Excel format, click on the **'export'** button on the top right-hand side of your screen.

| Total Paid 9 | | | | | | | | | | |
|-----------------------|--------------------------|--------------------|--|------|--------------------|-------------------|-----------------------|------------------------------------|-------------------------------------|--|
| Membership Number 📍 💌 | Account Name 🕇 🔍 | Application Type 💌 | Parent Account | Paid | Allocated Assessor | Assessment Date 💌 | Assessment Deadline 💌 | f _x Assessment status ▼ | Application: Application Number 🕈 💌 | |
| 1111.0005 | Portal Demo Site 1 | Renewal | Member Portal Test Account - Head Office | Ø | | 11/07/2022 | 05/07/2022 | Certified | AP007222 | |
| | | Renewal | Member Portal Test Account - Head Office | Ø | | | 10/09/2023 | Awaiting appointment date | AP011364 | |
| 1111.0009 | Portal Demo Site 5 | Renewal | Member Portal Test Account - Head Office | | | 26/02/2021 | 30/06/2021 | Certified | AP011857 | |
| | | Renewal | Member Portal Test Account - Head Office | | | 08/11/2022 | 26/04/2022 | Certified | AP011871 | |
| | | Renewal | Member Portal Test Account - Head Office | | | | 08/01/2024 | Awaiting appointment date | AP011882 | |
| 1111.0013 | Portal Demo Site 2 | Update | Member Portal Test Account - Head Office | | | 12/07/2022 | 15/08/2022 | Certified | AP008947 | |
| 1111.0014 | Portal Demo Site 4 | Update | Member Portal Test Account - Head Office | | | 04/07/2022 | 15/08/2022 | Certified | AP008948 | |
| 1111.0015 | Portal Demo Site 6 | Update | Member Portal Test Account - Head Office | | | 13/06/2022 | 15/08/2022 | Certified | AP008949 | |
| 1111.0016 | Portal Demo Site Haulier | Update | Member Portal Test Account - Head Office | | | 11/07/2022 | 15/08/2022 | Certified | AP008950 | |



How do I view my contact details?

Click on the **'contacts'** button on the navigation bar.

| | | | X | | | | | | | |
|--|--|---|--|-----------------------------------|--|---------------------------------|--------------------------------------|-------------|-----------------------|--------------|
| Home | | Site Assessments | Contacts H | elp | | | | ٩ 4 | 💄 🙆 Vane: | ssa11 Elliot |
| ontacts are 1. Head O 2. Site cor | split into 2 sections: Iffice contacts are the people who d ntacts are the people that our asses | eal with your membership, this sors will contact to book asses | includes setting up new sors visits. | v sites, certificates, renewals a | and general enquiries. | | | | | |
| u can EDIT, | ADD NEW, or DELETE contacts by cliv | cking on the buttons on the top rig | ht hand corner of the scr | en. | | | | | | |
| ssigning Co o help us m | antact Roles: anage your membership as the port | al develops, please assign the ! | ollowing 4 ROLE TYPE | S to at least one of your Head | Office Contacts. To do this please click the ED | IT button on the right hand sid | e, update the Role and then | press save. | | |
| • Invoice • Assess • Complia • Admini | Contact Role who will receive a copy ment Contact Role who will receive a ance Contact Role who will receive a stration Contact Role who administer | of every invoice that we generate copy of the Assessment Report (fi copy of the Pink Report (for a late rs the membership for your site(s) | for you or a later stage in our poi r stage in our portal deve | tal development) lopment) | | | | | | |
| • Note: A ease note to | Il Site Contacts will be assigned an . > change the Head Office Primary Cont | Assessment Contact Role act please get in touch with the M | ambership Services | | | | | | | |
| | | | | | | | | | | |
| Head Of | flice Contacts | | | | | | | Edit | Delete | New |
| Head Of SELECT TO DELETE | D NAME | EMAIL | TITLE | PRIMA | RY ROLE | MOBILE | PHONE | Edit | Delete ERRED PHONE | New |
| Head Of | O NAME Jo Smith | EMAIL help@rspcaassured.org.uk | TITLE | PRIMAE | RV ROLE CAdministration Contact,Assessments Contact.Certification Contact;Invoice Contact | MOBILE | PHONE 01111 11111 | Edit | Delete ERRED PHONE | New |
| Head Of SELECT T DELETE | Tice Contacts O NAME Jo Smith Primary Test Name (6000) Test Sumare | EMAIL help@rspcaassured.org.uk help@rspcaassured.org.uk | TITLE | PRIMAI CONTA | RY CT ROLE Administration Contact.Assessments Contact. Certification Contact.Invoice Contact Administration Contact.Assessments Contact.Certification Contact.Invoice Contact | MOBILE | PHONE 01111 11111 03333 333333 | Edit | Delete ERRED PHONE | New |



Contacts are split into 2 sections:

- <u>Head Office contacts</u> are the people who deal with your membership, this includes setting up new sites, certificates, renewals and general enquiries.
- 2. <u>Site contacts</u> are the people that our assessors will contact to book assessor visits.



How do I edit a contact?

Click on the 'edit' button in the top right-hand corner of the screen.

| Home | Site Accounts | | Site Assessments | Contacts | Help | | | | | | ÷ | 2 | Vanessa11 Elliot |
|---|--|--|--|--|-----------------------------------|------------------------------|--|-----------------------------|-------------------------------------|----------|--------|-------|------------------|
| Contacts are 1. Head O 2. Site co | split into 2 sections: Office contacts are the ntacts are the people t | people who dea that our assesso | l with your membership, this ors will contact to book asse | inoludes setting u ssors visits. | o new sites, ce | rtificates, renewals and gen | eral enquiries. | | | | | | |
| You can EDIT, | ADD NEW, or DELETE | contacts by clicki | ing on the buttons on the top rig | ght hand corner of th | e screen. | | | | | | | | |
| Assigning Co To help us m | ontact Roles: nanage your membersh | nip as the portal | develops, please assign the | following 4 ROLE 1 | YPES to at leas | st one of your Head Office C | Contacts. To do this please click the E | DIT button on the right har | nd side, update the Role and then p | ress sav | /e. | | |
| Invoice Assess Compli | Contact Role who will sment Contact Role wh iance Contact Role who | receive a copy of to will receive a co o will receive a co | every invoice that we generate py of the Assessment Report (py of the Pink Report (for a late | e for you for a later stage in ou er stage in our portal | ır portal develop development) | pment) | | | | | | | |
| • Admini • Note: A | istration Contact Role | who administers t e assigned an As | the membership for your site(s) | | | | | | | | | | |
| Please note to | o change the Head Offic | e Primary Contact | t please get in touch with the N | lembership Services | | | | | | | - | | |
| Head Of | ffice Contacts | | | | | | | | | | Edit | Dek | ete New |
| SELECT T DELETE | O NAME | | EMAIL | TI | ΓLE | PRIMARY CONTACT | ROLE | MOBILE | PHONE | PF | REFER | RED F | PHONE |
| | Jo Smith | | help@rspcaassured.org.uk | | | | Administration Contact;Assessments Contact;Certification Contact;Invoice Contact | | 01111 11111 | La | ndline | | |
| | Primary Test N Test Surname | lame (6000) | help@rspcaassured.org.uk | | | × | Administration Contact;Assessments Contact;Certification Contact;Invoice Contact | | 03333 333333 | | | | |
| | | | | | | | | | | | | | |
| Site Cor | ntacts | | | | | | | | | | Edit | Dele | ete New |
| | | | | | | | | | | | | | |

Update the information fields and then press 'save'.

| Head Office C | Contacts | | | | | | | Cancel | Save Delete New |
|---------------------|------------|-----------|----------------------------------|----------------------|--------------------|---------------------|--------------|--------------|----------------------|
| SELECT TO DELETE | FIRST NAME | LAST NAME | EMAIL | TITLE | PRIMARY CONTACT | ROLE | MOBILE | PHONE | PREFERRED PHONE |
| | Angel | Galtrey | training+363@rspcaassured.org.uk | | | 5 Values Selected 💌 | | | Select an Option 🛛 🔻 |
| | Gemma | Riley | training@rspcaassured.org.uk | Senior Administrator | * | 0 Values Selected | 07387 102298 | 01482 895949 | Landline 💌 |



How do I add a new contact?

Click on the 'new' button in the top right-hand corner of the screen.

| Home | Site Accounts | Site Units | Site Assessments | Contacts | Help | | | | | ۹ | ¢. | 2 Vane | essa11 Elliott |
|---|---|---|---|--|--|------------------------------|--|-----------------------------|--------------------------------------|---------|-------|---------|----------------|
| Contacts and 1. Head C 2. Site co You can EDIT | e split into 2 sections: Office contacts are the pe ontacts are the people the F, ADD NEW, or DELETE co | eople who deal v at our assessors ontacts by clicking | with your membership, this s will contact to book asse g on the buttons on the top ri | s includes setting essors visits. | up new sites, cer the screen. | tificates, renewals and gen | eral enquiries. | | | | | | |
| Assigning C To help us n | iontact Roles: nanage your membership | as the portal de | evelops, please assign the | following 4 ROLE | TYPES to at leas | st one of your Head Office (| Contacts. To do this please click the E | DIT button on the right han | d side, update the Role and then pre | ss save | e. | | |
| • Invoio • Asses • Compl • Admin • Note: / Please note t | e Contact Role who will re sment Contact Role who iance Contact Role who istration Contact Role wh All Site Contacts will be a to change the Head Office f | iceive a copy of e will receive a copy will receive a copy no administers the assigned an Asse Primary Contact p | very invoice that we generat y of the Assessment Report of the Pink Report (for a lat a membership for your site(s essment Contact Role slease get in touch with the N | ie for you (for a later stage in ier stage in our port ;) Membership Service | our portal develop al development) s | ment) | | | | | | | |
| Head O | ffice Contacts | | | | | | | | | E | dit | Delete | New |
| SELECT 1 DELETE | IO NAME | | EMAIL | 1 | TITLE | PRIMARY | ROLE | MOBILE | PHONE | PRI | EFERR | ED PHON | E |
| | Jo Smith | I | help@rspcaassured.org.uk | | | | Administration Contact;Assessments Contact;Certification Contact;Invoice Contact | | 01111 11111 | Lan | dline | | |
| | Primary Test Nan Test Surname | ne (6000) | help@rspcaassured.org.uk | | | × | Administration Contact;Assessments Contact;Certification Contact;Invoice Contact | | 03333 333333 | | | | |
| Site Co | ntacts | | | | | | | | | E | dit | Delete | New |

Complete the fields and press 'save'.

| | New Contact |
|--------------|------------------|
| * First Name | *Last Name |
| *Email | * Job Title |
| * Phone | * Mobile |
| * Role | *Preferred Phone |



How do I delete a contact?

Select the contact in the first column and press 'delete'.

| Head Office C |
|---------------------|
| SELECT TO DELETE |
| ~ |
| |

How do I assign contact roles?

To help us manage your membership as the portal develops, please assign the following 4 ROLE TYPES to AT LEAST ONE of your Head Office contacts. To do this, please click the 'edit' button on the right-hand side, update the role and then press 'save'.

- Invoice Contact Role who will receive a copy of every invoice that we generate for you
- Assessment Contact Role who will receive a copy of the Assessment Report (for a later stage in our portal development)
- Compliance Contact Role who will receive a copy of the Pink Report (for a later stage in our portal development)
- Administration Contact Role who administers the membership for your site(s)
- > Note: All Site Contacts will be assigned an Assessment Contact Role

To change the Head Office Primary Contact please get in touch with Membership Services via email: <u>help@rspcaassured.org.uk</u>



I still need help!

We are sorry to hear that you are still having issues with the updated salesforce system.

For more information please visit the HELP page on the members portal. Alternatively, please contact membership services via their email address: <u>help@rspcaassured.org.uk</u>, or by phone: <u>01403 286170</u> (lines are open Monday to Friday 9 am to 5 pm).