



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 [click here](#) and enter your Username and Password.

If you have not logged in before or are having any difficulties please contact Membership Services.

A screenshot of the RSPCA Assured login portal. At the top center is the RSPCA Assured logo. Below it are two input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a lock icon. Below these fields is a blue "Log in" button. At the bottom of the form area is a link that says "Forgot your password?".

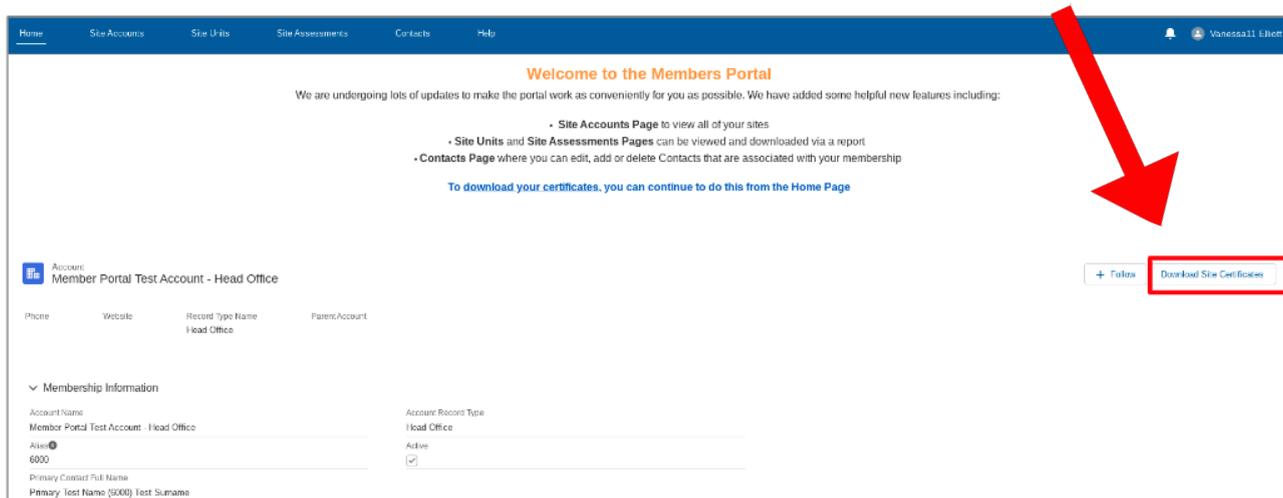


[Log in](#)
[Forgot your password?](#)



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.



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



How do I view my site accounts?

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

The screenshot shows the RSPCA ASSURED website interface. At the top, there is a navigation bar with the following items: Home, Site Accounts (highlighted with a red arrow), Site Units, Site Assessments, Contacts, and Help. On the right side of the navigation bar, there are search, notification, and user profile icons (Vanessa11 Elliott).

Below the navigation bar, the page title is "Site Accounts for your membership". Below this, there is a message: "Below is a list of all of the sites and their status and address details that we hold on our system. To make any changes to the site addresses please contact Membership Services".

The main content area is titled "Accounts" and shows a table with 7 items. The table has the following columns: Account Name, Membership Nu..., Account Record..., Status, Billing Street, Billing City, County, Billing Zip/Postal..., Region, and Last Modified Date. Each row represents a site account.

Account Name	Membership Nu...	Account Record ...	Status	Billing Street	Billing City	County	Billing Zip/Postal...	Region	Last Modified Date
1 Member Portal Test Account - Head Office	.	Head Office	MEMBER	Parkside	Horsham	West Sussex	RH12 1GY	South East	07/06/2023 12:29
2 Portal Demo Site 1	6000.0006	Site	MEMBER	Farm 1	Oxfordshire	Oxfordshire	OX1 1OX	South East	06/06/2023 17:22
3 Portal Demo Site 2	6000.0013	Site	MEMBER	Station Road	Portsmouth	Berkshire	PO9 9PO	South East	06/06/2023 17:20
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
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 Hauler	6000.0016	Site	MEMBER	Big Road Farm	Oxon		OX1 1OX		06/06/2023 17:23

[All Site Accounts](#)

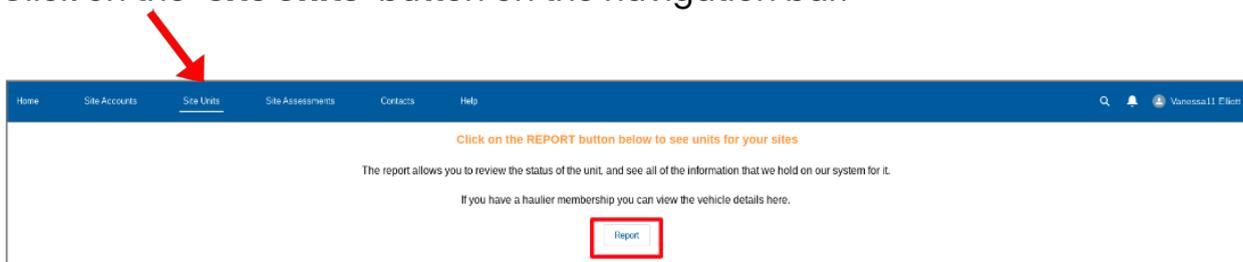
Here, you will see all the sites that are associated with you. You can see their status and the site details that we hold on our system.

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



How do I view my site units?

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

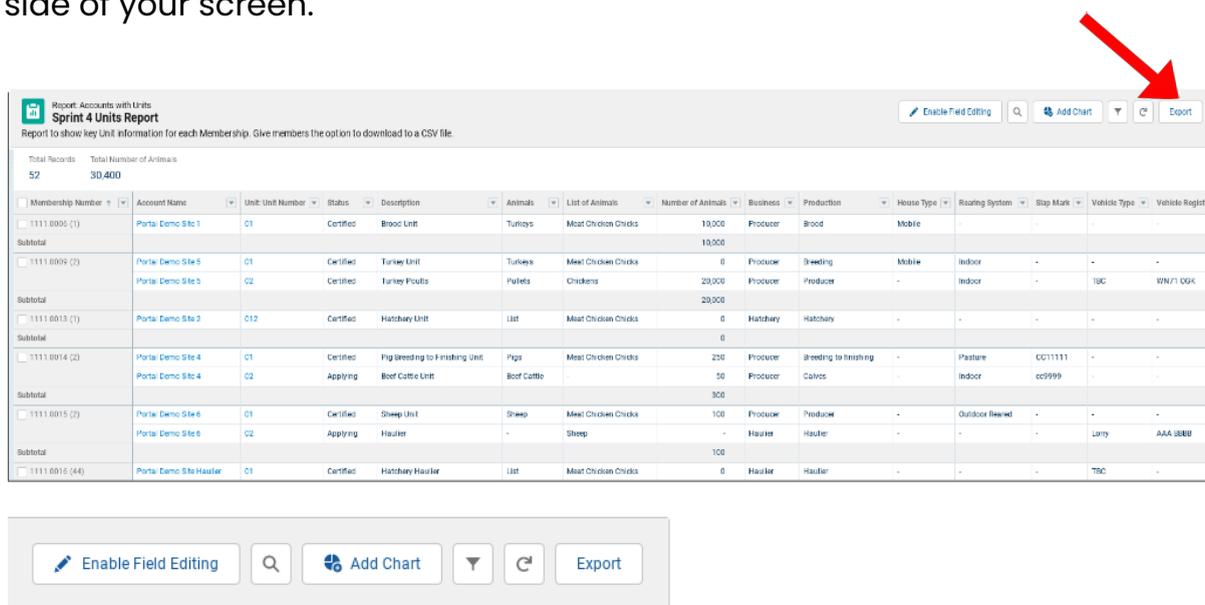


Then click on the Report button in the middle of the screen.

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.

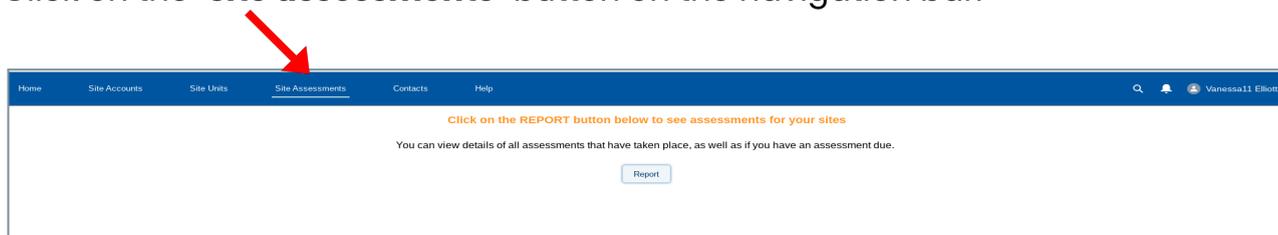
Please note the description field is shown on your certificates. To **export your report to an Excel format**, click on the **'export'** button on the right hand side of your screen.





How do I view my assessment information?

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



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.

Membership Number	Account Name	Application Type	Parent Account	Paid	Allocated Assessor	Assessment Date	Assessment Deadline	Assessment status	Application: Application Number
1111.0006	Portal Demo Site 1	Renewal	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		11/07/2022	05/07/2022	Certified	AP007222
		Renewal	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		-	16/06/2023	Awaiting appointment date	AP011364
1111.0009	Portal Demo Site 5	Renewal	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		26/02/2021	30/06/2021	Certified	AP011857
		Renewal	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		08/11/2022	26/04/2022	Certified	AP011871
		Renewal	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		-	08/01/2024	Awaiting appointment date	AP011882
1111.0013	Portal Demo Site 2	Update	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		12/07/2022	15/06/2022	Certified	AP008947
1111.0014	Portal Demo Site 4	Update	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		04/07/2022	15/06/2022	Certified	AP008948
1111.0015	Portal Demo Site 5	Update	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		13/06/2022	15/06/2022	Certified	AP008949
1111.0016	Portal Demo Site Haulier	Update	Member Portal Test Account - Head Office	<input checked="" type="checkbox"/>		11/07/2022	15/06/2022	Certified	AP008950



How do I view my contact details?

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



Home Site Accounts Site Units Site Assessments **Contacts** Help

Contacts are split into 2 sections:

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

You can **EDIT**, **ADD NEW**, or **DELETE** contacts by clicking on the buttons on the top right hand corner of the screen.

Assigning 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

Please note to change the Head Office Primary Contact please get in touch with the Membership Services

Head Office Contacts									Edit	Delete	New
SELECT TO DELETE	NAME	EMAIL	TITLE	PRIMARY CONTACT	ROLE	MOBILE	PHONE	PREFERRED PHONE			
<input type="checkbox"/>	Jo Smith	help@rspcaassured.org.uk		<input type="checkbox"/>	Administration Contact; Assessments Contact; Certification Contact; Invoice Contact		01111 11111	Landline			
<input type="checkbox"/>	Primary Test Name (6000) Test Surname	help@rspcaassured.org.uk		<input checked="" type="checkbox"/>	Administration Contact; Assessments Contact; Certification Contact; Invoice Contact		03333 33333				

Site Contacts

Edit Delete New



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How do I edit a contact?

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

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<input type="checkbox"/>	Primary Test Name (6000) Test Surname	help@rspcaassured.org.uk		<input checked="" type="checkbox"/>	Administration Contact;Assessments Contact;Certification Contact;Invoice Contact		03333 333333				

Site Contacts

Edit Delete New



Update the information fields and then press **'save'**.

Head Office Contacts											Cancel	Save	Delete	New	
SELECT TO DELETE	FIRST NAME	LAST NAME	EMAIL	TITLE	PRIMARY CONTACT	ROLE	MOBILE	PHONE	PREFERRED PHONE						
<input type="checkbox"/>	Angel	Galtrey	training+963@rspcaassured.org.uk		<input type="checkbox"/>	5 Values Selected			Select an Option						
<input type="checkbox"/>	Gemma	Riley	training@rspcaassured.org.uk	Senior Administrator	<input checked="" type="checkbox"/>	0 Values Selected	07387 102296	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

Vanessa11 Elliott

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Assigning Contact Roles:
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<input type="checkbox"/>	Primary Test Name (6000) Test Surname	help@rspcaassured.org.uk		<input checked="" type="checkbox"/>	Administration Contact;Assessments Contact;Certification Contact;Invoice Contact		03333 333333			

Site Contacts

Edit Delete New

Complete the fields and press **'save'**.

New Contact

*First Name

*Last Name

*Email

*Job Title

*Phone

*Mobile

*Role

*Preferred Phone

Cancel Save



How do I delete a contact?

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

Head Office C
SELECT TO DELETE
<input checked="" type="checkbox"/>
<input type="checkbox"/>

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
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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:

help@rspcaassured.org.uk, or by phone: [01403 286170](tel:01403286170) (lines are open

Monday to Friday 9 am to 5 pm).