

CB Guide: How to Upload Public Summary Reports and Certification related Documentation

Background/ Issue Summary

Currently the new lightning experience offered in the FSC Salesforce hosted database does not support uploading of public summary reports and related documentatuin as an attachment format which is required to display the information via the FSC Public search database.

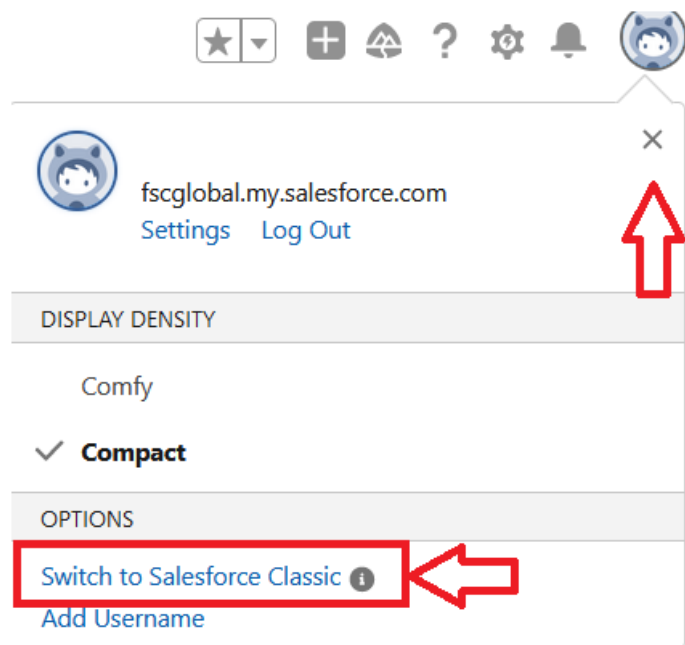
This means that all public summary and related certification documents uploaded as attachments while using the Salesforce lightning mode experience are not currently visible in the FSC Public search database.

Solution/ Workaround

In order to ensure that public summary and related certification documents uploaded via the FSC Salesforce database are available and visible on the FSC public dashbaord. Certification Bodies are requested to use the Salesforce classic version to upload all public summary reports.

Please follow the **3 easy Steps** below on how to upload documents via the Salesforce Classic Mode

Step 1. Log in to Salesforce and clock on the top right corner avatar icon to switch to **salesforce classic version**



Step 2. Open the respective certificate record, from the certificate attachment section; click **New Certificate Attachment**. Provide the attachment information.

Products
New Product

Action	Product Classification Name	Main Output Category	Level 1
Edit Del	Prod-00047981	FSC 100%	W1 Rough wood
Edit Del	Prod-00048035	FSC Controlled Wood	N9 Food

Certificate Attachment
New Certificate Attachment

Action	Date of Document	Subject	Document Type
Edit Del			Annexes
Edit Del	27/03/2018	Extended	(Extended) Company Risk Assessment (available on Website)

Status History
New Status History

Step 3. Provide the details in the Certificate Attachment Edit page and save. In the Certificate Attachment detail page, click **Attach File** to upload the public summary and related certification documents.

Certificate Attachment
Att-00238291

[Notes & Attachments](#)

Certificate Attachment Detail [Edit](#) [Delete](#) [Clone](#)

Certificate

Subject

Active

CerAttachDynamicsId

UpdateToDynamics

Certificate Attachments Name

Created By

[Edit](#) [Delete](#) [Clone](#)

Notes & Attachments

New Note
[Attach File](#)
←

Step 4. Follow the steps in the “Attach File” page to upload the attachment and click Done.

NOTE

This is a temporary workaround. The FSC Technology team is working on a permanent solution together with our IT Service partners to enable upload of Public summary reports and related certification documentation. Once the solution development is complete a notification will be shared with all accreditation bodies.