



Client User Guide

Version 3

December 2023

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Business Partners

Topics	Page Number
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Business Partners Field Dependencies - Guidance:

New field dependency has been implemented for the Business Partner records between the Type of Business Partner and the available Processing Steps/Activities that can be selected for the record.

The screenshot shows a 'New Business Partner' form with the following sections and fields:

- Information**
 - * Business Partner Name: Text input with value 'Test BP Andrei 1'.
 - * Type: Dropdown menu with value 'Facility'. Below it is a link 'View all dependencies'.
 - Business Partner's Tax ID: Text input.
 - Employees: Text input.
 - * Account: Dropdown menu with value 'ADELE DEMO SPA'.
 - * Business Partner Account: Search input with value 'Search Accounts...'.
 - Type of Relation: Dropdown menu with value 'Main'.
 - Contact: Search input with value 'Search Contacts...'.
- Address**
 - Address of Operation: Text input.
 - City: Text input.
 - State: Text input.
 - Country: Dropdown menu with value '--None--'.
- Certification Details**
 - * Independently Certified Standard: Two columns, 'Available' and 'Chosen'. The 'Available' column contains CCS, GOTS, GRS, and OCS.
 - * Processing Steps/Activities: Two columns, 'Available' and 'Chosen'. The 'Available' column contains 'No processing | P...', 'Boiling | PR0001', 'Breeding | PR0002', and 'Biological recyclin...'. Below it is a link 'View all dependencies'.

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Business Partners Facility and Subcontractor Types - Guidance:

If the Type of Business Partner is selected as Facility or Subcontractor, the Processing Steps/Activities will become accessible and mandatory for the user to select different values applicable for the Business Partner.

Business Partners Other Types - Guidance:

If the Type of Business Partner is selected is not Facility or Subcontractor, the Processing Steps/Activities will become inaccessible for the user to select different values applicable for the Business Partner.

Business Partners Type of Relation Validation - Guidance:

A Validation Rule has been implemented in order to ensure correct data is input for the Type of Business Partner and the Type of Relation.

Edit Test BP Andrei 1

Review the errors on this page.

* Business Partner Name: Test BP Andrei 1

* Type: Facility

Business Partner's Tax ID: [Empty]

Employees: [Empty]

Type of Relation: --None--

Contact: Search Contacts...

Type of Relation is required for this Business Partner Type

If the Business Partner is a Facility or Subcontractor, the Type of Relation field is mandatory in order to save the Business Partner record.

An error message is displayed on the screen with the message “Type of Relation is required for this Business Partner Type”.

Edit Test BP Andrei 1

Review the errors on this page.

* Business Partner Name: Test BP Andrei 1

* Type: Subcontractor

Business Partner's Tax ID: [Empty]

Employees: [Empty]

Type of Relation: --None--

Contact: Search Contacts...

Type of Relation is required for this Business Partner Type

User Specified Terms on Business Partner

Process User Specified Terms Component - Guidance:

Component displayed on the right hand side of the screen above the Files related list. This component displays a list of Processing Steps defined on the Processing Steps/Activities field and a column to add the **User Specified Terms**.

The screenshot shows the 'Business Partner' record for 'MILENA'. The 'Process User Specific Term' component is highlighted with a blue border. It contains a table with the following data:

Processing Step	Process User Specific Term
No processing PR0000	TEST 1
Boiling PR0001	TEST 2
Breeding PR0002	TEST 3
Biological recycling PR0003	TEST 4

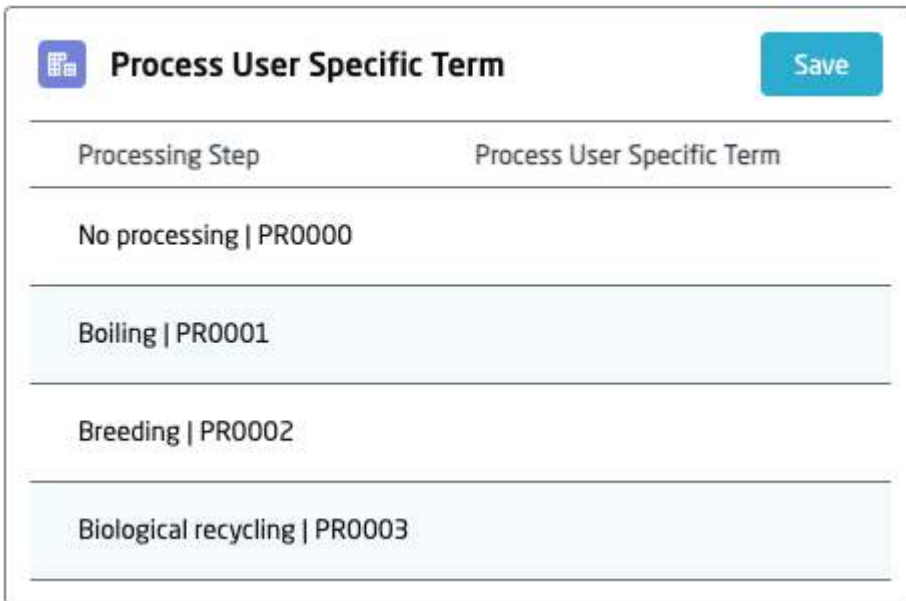
Below the table, there is a 'Files (0)' section with an 'Add Files' button and an 'Upload Files' button. At the bottom, there is a 'Business Partner Relations (0)' section.

Edit the Business Partner record and add the corresponding options under the Processing Steps/Activities multi-select picklist. Once the options are added, click the **Save** button and refresh the current page browser.

The screenshot shows the 'Processing Steps/Activities' multi-select picklist interface. It is divided into two columns: 'Available' and 'Chosen'. The 'Available' column contains the following options: 'Chemical recycling | PRO...', 'Collecting | PR0005', 'Concentrating | PR0006', and 'Down processing | PR00...'. The 'Chosen' column contains the following options: 'No processing | PR0000', 'Boiling | PR0001', 'Breeding | PR0002', and 'Biological recycling | PR00...'. Below the picklist, there is an 'Expiry Date' field and a 'Save' button.

User Specified Terms on [Business Partner](#)

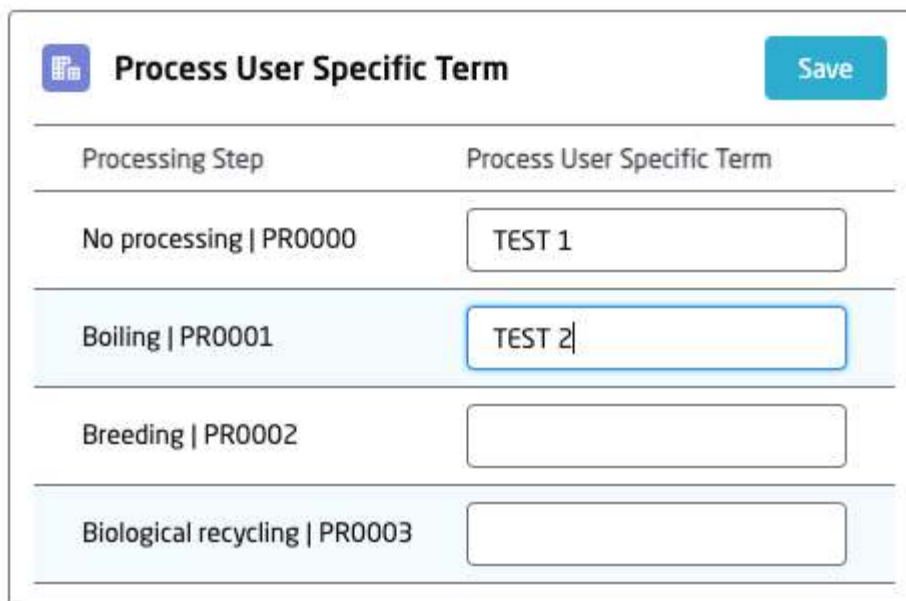
On the [Process User Specified Terms](#) component from the screen, under the column [Processing Step](#), a list of rows will appear accordingly to the options selected on the [Processing Steps/Activities](#) field.



Processing Step	Process User Specific Term
No processing PR0000	
Boiling PR0001	
Breeding PR0002	
Biological recycling PR0003	

Guidance: Double click on the component to enable editing.

Define the Process User Specific Term on the rows of Processing Step that need information.



Processing Step	Process User Specific Term
No processing PR0000	TEST 1
Boiling PR0001	TEST 2
Breeding PR0002	
Biological recycling PR0003	

Click on the [Save](#) button in order to save the changes. A success message will be displayed at the top of the page.



Scope Certificate

Topics	Page Number
<ul style="list-style-type: none">1. Creation<ul style="list-style-type: none">a. Adding standards to the certificateb. Adding products, material compositions and product facilities<ul style="list-style-type: none">i. Label gradeii. Material composition percentage validation2. Chatter Interactions<ul style="list-style-type: none">a. Taggingb. Notifications3. Status Comments<ul style="list-style-type: none">a. Substatus4. Cloning Button5. Business Partner Relations	

Adding Standard to the Certificate - Guidance:

Certificate Standard object has been created to store the relationship between a Certificate and a Standard. This relationship is a one-to-many relationship, therefore one Scope Certificate can be linked to multiple Certificate Standards in order to comply with the multi-standard policy. Certificate Standards related list is now part of the layout of a Scope Certificate.

intertek
sourceclear Home Certificate Business Partners Contacts More

Certificate C-0000794 [+ Follow](#) [New Business Partner Relation](#) [Submit Request](#) [Clone Scope Certificate](#)

Status Pending **Record Type: Scope Certificate**

Pending Submitted Audit Completed Approved Rejected Suspended Withdrawn/Ter... Archive Expired [Mark Status as Complete](#)

Key Fields [Edit](#) **Guidance for Success**

Certified Company [ADELE DEMO SPA](#)

Project Type Re-certification

Reference Standard

- This status is used to provide all the information required for Scope Certificates.
- Make sure all key fields are populated.
- Add products using the Certificate Products section.
- Add facilities and sub-contractors using the Business Partner Relations section. Indicate number of employees for GRS applications.
- Please indicate if you are using consultants.
- For any certified entities you must provide License number and certificate expiry date.
- Add details to the customer information section; fields related to process with chemicals must be completed only for GRS applications.
- Once the information is completed, please submit this request.

Information

Certified Company [ADELE DEMO SPA](#)

Contact [Adele Puteri](#)

Project Type Re-certification

Reference Standards

Program Name RAF

Status Comments

Certificate Name C-0000794

Owner [Adele Puterissss](#)

Related scope certificate

Status Pending

Sub-Status

Customer Information

Process with Chemicals

Quantity of chemicals used

Standard history

Other Services

Other Services- Describe

Your Company's Tax ID

Claim forms

Please use the links below to download the claim form:

[Claim form: Textile Exchange](#)

[Claim form: GOTS](#)

RELATED CHATTER

[Claim Approval Requests \(0\)](#)

[Activity History \(0\)](#)

[Business Partner Relations \(0\)](#)

[Certificate Standards \(0\)](#) [New](#)

Click on the [New](#) button of the Certificate Standards related list in order to add a new Certificate Standard to the Scope Certificate.

New Certificate Standard - Guidance:

1. Specify the Reference Standard that is applicable to the Scope Certificate.
 2. Specify the Standard Version of the Reference Standard.
- There is a pre-defined dependency between the Reference Standard selected and the available Standard Versions.

New Certificate Standard

Information

* Reference Standard
1 RCS
[View all dependencies](#)

* Certificate
C-0000794

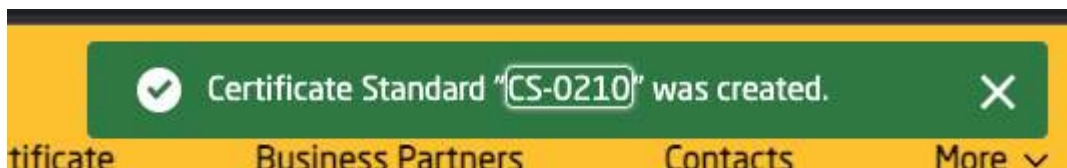
* Standard Version
2 2.0
[View all dependencies](#)

Logo Information

Standard Logo

Cancel Save & New Save

Click on the [Save](#) button in order to add a new Certificate Standard to the Scope Certificate.



A new Certificate Standard has been saved and added to the related list of Certificate Standards of the Scope Certificate.

New Certificate Standard - Guidance:

The Certificate Standards list now contains the Standards specified for the Scope Certificate.

A new field has been introduced called Reference Standards that displays the list of Reference Standards selected for the Scope Certificate.

The screenshot shows a form for creating a new certificate standard. The 'Reference Standards' field is highlighted with a blue box and contains 'RCS'. The 'Certificate Standards' list on the right is also highlighted with a blue box and shows one entry:

Certificate Standard N...	Certified Weight (Kg)	Reference Standard	Standard Version
CS-0210	0.00	RCS	2.0

Multi Standard Certificate - Guidance:

If the Scope Certificate is a multi standard certificate, the user can add multiple Certificate Standards related to the Scope Certificate following the previous adding process.

The screenshot shows the same form as above, but the 'Reference Standards' field now contains 'RAS;RCS;RMS'. The 'Certificate Standards' list is highlighted with a blue box and shows three entries:

Certificate Standard N...	Certified Weight (Kg)	Reference Standard	Standard Version
CS-0210	0.00	RCS	2.0
CS-0211	0.00	RAS	1.0
CS-0212	0.00	RMS	1.2

The Scope Certificate can have multiple Certificate Standards related. The relationship is represented by the Related List Certificate Standards and the Reference Standards field.

Important Note:

There cannot be more than once instance of the same Reference Standard on a Scope Certificate.

Certificate Product - Guidance:

On the Certificate Product record, a new related list has been created to store the Certificate Product Standards. This object is a relationship between the Certificate Standards from the Scope Certificate and the Reference Standards applied on the Certificate Product.

Create a Certificate Product from the related list of Certificate Products on the Scope Certificate.

Certificate Products (1) New			
Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8662	Men's apparel PC0001...		▼
			View All

On the Certificate Product created, you can find the related lists of Product Facilities, Material Composition SC's and a new list called Certificate Product Standards.

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Certificate Product
P-8662 Edit

▼ **Scope Product**

Product Category
Men's apparel | PC0001

Product Category - User Specific Terms ⓘ

Certificate Product Name
P-8662

Certificate
[C-0000794](#)

Product Status

Geographic Origin Not Specified ⓘ

Final Product ⓘ
No

Composition Type SC ⓘ

▼ **Transaction Product**

Invoice Number

Invoices on Product

Article Number

Product Details
Overcoats, jackets, vests | PD0001

Product Details - User Specific Terms ⓘ

Product Description SC
Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 -

Product Description
Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 -

Material Composition SC ⓘ

Material Composition TC ⓘ

Product Facilities (0) New

Material Composition SC's (0) New

Material Composition TC's (0)

Certificate Product Standards (0)

Files (0) Add Files

[Upload Files](#)

Or drop files

Certificate Product History (1)

Date	Field	User	Original Value	New Value
21/04/202...	Created.	Adele Puteri...		▼

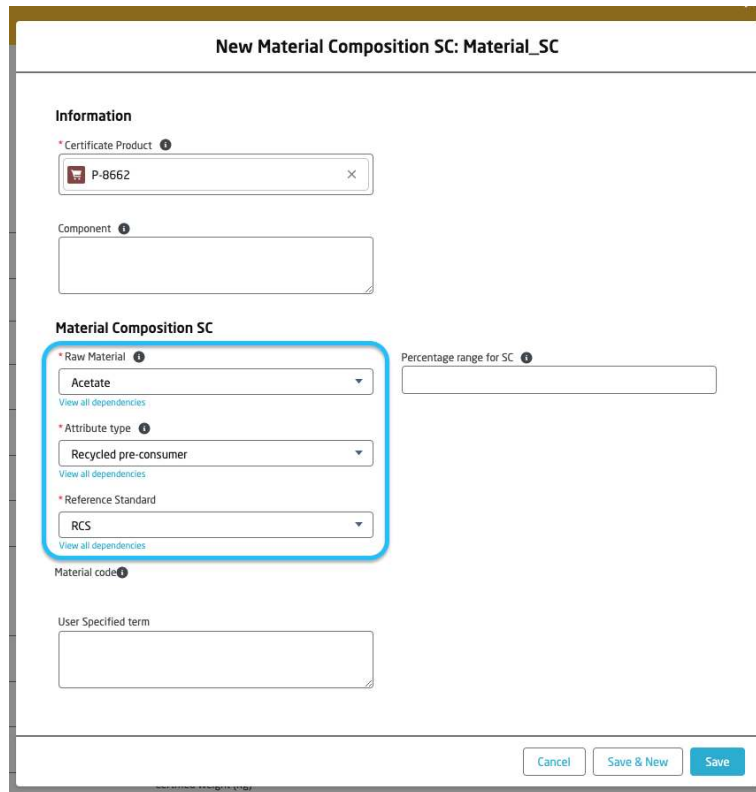
[View All](#)

From the related list of Material Composition SC's create a new Material Composition.

Material Composition SC - Guidance:

The Material Composition SC record is directly linked to the Reference Standard that is suitable for and it is mandatory for creation.

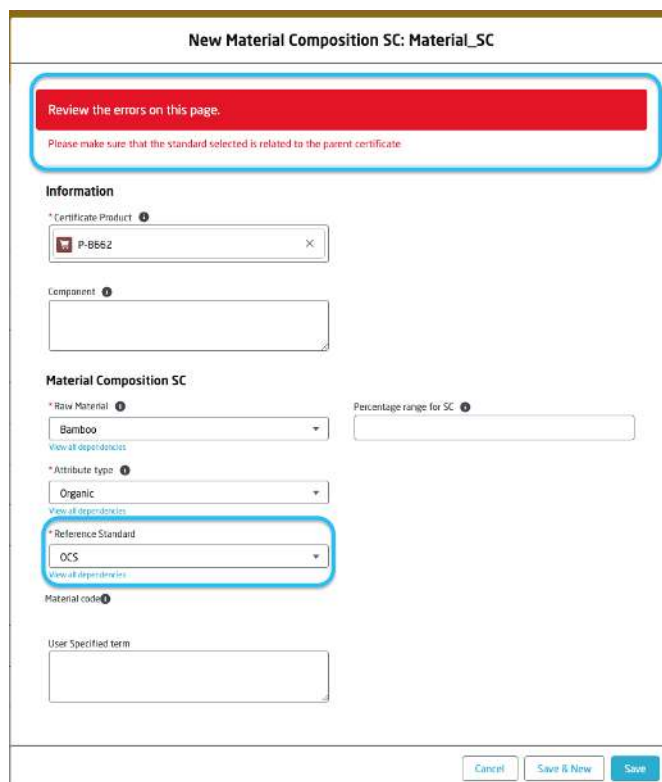
The available Reference Standards on the Material Composition depend on the Reference Standards applied on the Scope Certificate record.



The screenshot shows a web form titled "New Material Composition SC: Material_SC". The form is divided into sections: "Information" and "Material Composition SC". In the "Information" section, the "Certificate Product" field contains "P-B662". The "Material Composition SC" section contains several fields: "Raw Material" (Acetate), "Attribute type" (Recycled pre-consumer), "Reference Standard" (RCS), "Percentage range for SC", "Material code", and "User Specified term". A blue box highlights the "Raw Material", "Attribute type", and "Reference Standard" fields, indicating a dependency between them.

There is a field dependency between the 3 fields highlighted in order for the user to be able to select a Reference Standard.

Make sure you select a Reference Standard that is present at the Scope Certificate level. If you are trying to save the Material Composition record with a different standard that is not part of the standards selected for the Scope Certificate, an error message will be displayed.



The screenshot shows the same web form as above, but with an error message displayed at the top in a red box: "Review the errors on this page. Please make sure that the standard selected is related to the parent certificate." The "Reference Standard" field in the "Material Composition SC" section is highlighted in a blue box and contains "OCS", which is not the same as the "RCS" shown in the previous screenshot.

Label Grade - Guidance:

On the Standard Salesforce UI, the Label Grade is defined on the Certificate Product Standard related records of a Certificate Product.

The Certificate Product Standard record is created automatically once you add a Material Composition record to the Certificate Product and define a Reference Standard from the selected standards on the Scope Certificate.

Once the Material Composition record is created, a new Certificate Product Standard record is created for the specified Reference Standard.

Material Composition SC "MCSC-004335" was created. X

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Certificate Product P-8662

Scope Product

Product Category: Men's apparel | PC0001

Product Details: Overcoats, jackets, vests | PD0001

Certificate Product Name: P-8662

Certificate: C-0000794

Product Status: No

Geographic Origin Not Specified: No

Final Product: No

Composition Type SC: Recycled pre-consumer Acetate

Transaction Product

Product Facilities (0)

Material Composition SC's (1)

Material Compo...	Raw Material	Attribute type	Percentage rang...
MCSC-004335	Acetate	Recycled pre-con...	

Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000364	RCS		

There is a dependency between the Reference Standard selected on the Material Composition and the Label Grade you can select at the Certificate Product Standard record level.

Edit the existing Certificate Product Standard record and define a Label Grade.

Material Compo... Raw Material

Edit CPS-000364

Information

Certificate Product Standard Number: CPS-000364

Certificate Product: P-8662

Certified Weight (Kg):

Certificate Standard: CS-0210

System Information

Created By: Adele Puterissss, 23/04/2023 17:22

Last Modified By: Adele Puterissss, 23/04/2023 17:22

Reference Standard: RCS

Label Grade: RCS 100

Cancel Save & New Save

Save the changes by pressing the **Save** button.

Material Composition Percentage Validation - Guidance:
Validation Rule has been implemented in order for the system to enforce the user to have a specific Percentage Range for SC format value across all the Material Composition records defined for a Certificate Product.

The field called Composition Type SC controls the value format of the Percentage range for SC field for all the related Material Compositions.

Composition Type SC None - Guidance:
No specific format value is applied for the related Material Composition Percentage range for SC field.

Composition Type SC Blank - Guidance:
The values defined on the related Material Composition record should be blank in order to save the Material Composition record.

Composition Type SC Percentage - Guidance:
The values defined on the related Material Composition record should have the format of a value between 1 and 100 followed by the '%' symbol. Example: 52%

Composition Type SC Percentage Range - Guidance:
The values defined on the related Material Composition record should have the format of two values between 1 and 100 and each one followed by the '%' symbol. Example: 34%-64%

Product Facility - Guidance:

Product Facility object is a relationship between the Certificate Product and the Business Partner Relations present on the Scope Certificate.

Certificate
C-0000794

Status: Approved Record Type: Scope Certificate

+ Follow
New Business Partner Relation
Submit Request
Clone Scope Certificate

Approved
Rejected
Suspended
Withdrawn/Ter...
Archive
Expired
Mark Status as Complete

Guidance for Success

- The technical review has been completed and your certification request has been approved.
- The Scope Certificate has been issued and can be downloaded from the files section.

Information

<p>Certified Company ADELE DEMO SPA</p> <p>Contact Adele Puteri</p> <p>Project Type Re-certification</p> <p>Reference Standards RAS,RCS,RMS</p> <p>Program Name RAF</p> <p>Status Comments</p>	<p>Certificate Name C-0000794</p> <p>Owner Adele Puterissss</p> <p>Related scope certificate</p> <p>Status Approved</p> <p>Sub-Status</p>
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Customer Information

<p>Process with Chemicals</p> <p>Quantity of chemicals used</p> <p>Standard history</p>	<p>Other Services</p> <p>Other Services- Describe</p> <p>Your Company's Tax ID</p>
---	--

Certificate Dates

Certificate Initial Date	Certificate Issue Date
--------------------------	------------------------

Claim forms

Please use the links below to download the claim form:

Claim form: Textile Exchange

Claim form: GOTS

RELATED CHATTER

Claim Approval Requests (0)

Activity History (0)

Business Partner Relations (1)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
MILENA	GRS,OCS	No processing PR000...	Facility

[View All](#)

Add Product Facility - Guidance:

The available Business Partners to be selected for the Product Facility records are the Business Partners found on the related Business Partner Relations on the Scope Certificate.

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Certificate Product
P-8662

Edit

Scope Product

<p>Product Category Men's apparel PC0001</p> <p>Product Category - User Specific Terms</p> <p>Certificate Product Name P-8662</p> <p>Certificate C-0000794</p>	<p>Product Details Overcoats, jackets, vests PD0001</p> <p>Product Details - User Specific Terms</p> <p>Product Description SC Men's apparel PC0001 - Overcoats, jackets, vests PD0001 - 20% Recycled pre-consumer Acetate</p>
--	--

Product Facilities (0) New

Material Composition SC's (1) New

Material Compo...	Raw Material	Attribute type	Percentage rang...
MCS-004335	Acetate	Recycled pre-con...	20%

[View All](#)

From the related list of Product Facilities on the Certificate Product, click on the **New** button to add a new Product Facility record.

Once the Business Partner is defined as an existing Business Partner related to the Scope Certificate, press the **Save** button.

New Product Facility

Information

Product Facility Name

* Business Partner

MILENA

To remove the selected record, press Backspace or Del.

* Certificate Product

P-8662

Cancel Save & New Save

The newly created Product Facility's Business Partner matches an existing Business Partner from the list of Business Partner Relations on the Scope Certificate.

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source clear

Home Certificate Business Partners Contacts More

Search...

Certificate Product P-8662 Edit

▼ Scope Product

Product Category Men's apparel | PC0001

Product Category - User Specific Terms

Certificate Product Name

Product Details Overcoats, jackets, vests | PD0001

Product Details - User Specific Terms

▼ Customer Information

Process with Chemicals

Quantity of chemicals used

Standard history

Other Services

Other Services- Describe

Your Company's Tax ID

▼ Certificate Dates

Certificate Initial Date

Certificate Issue Date

Product Facilities (1) New

Product Facility...	Business Partner...	Type	Type of Relation
PF-5444	MILENA	Facility	Main

View All

Activity History (0)

Business Partner Relations (1)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
MILENA	GRS,OCS	No processing PR000...	Facility

View All

Chatter Post Tag - Guidance:

Users can now mention other internal users in the Chatter Feed of the Scope Certificate record.

Certificate
C-0000794

Status: Submitted Record Type: Scope Certificate

[+ Follow](#) [New Business Partner Relation](#) [Submit Request](#) [Clone Scope Certificate](#) ▼

Submitted Audit Completed Approved Rejected Suspended Withdrawn/Ter... Archive Expired [Mark Status as Complete](#)

Guidance for Success

- Your certification request has been submitted.
- You will receive an update on this shortly.

Information

Certified Company	Certificate Name
ADELE DEMO SPA	C-0000794
Contact	Owner
Adele Puteri	SCTC CS Rep Queue
Project Type	Related scope certificate
Re-certification	Status
Reference Standards	Submitted
RAS,RCS,RMS	Sub-Status
Program Name	
RAF	
Status Comments	

Claim forms

Please use the links below to download the claim form:

[Claim form: Textile Exchange](#)

[Claim form: GOTS](#)

RELATED **CHATTER**

Post

Hi [@Andrei Budescu](#),

I have now provided the required details

B I U S L Link Embed Image

To: C-0000794

[Share](#)

Use the @ symbol in order to mention an internal user on your post. The user mentioned in the post will receive a notification. Click on the [Share](#) button and the post will be stored in the record's Chatter Feed and the internal mentioned user will receive the notification about your update.

RELATED **CHATTER**

Post

Share an update...

[Share](#)

Sort by: Latest Posts ▼ ▼ ↻

[Adele Puterissss](#) (Customer) ▼

Just now

Hi [@Andrei Budescu](#) (Employee),

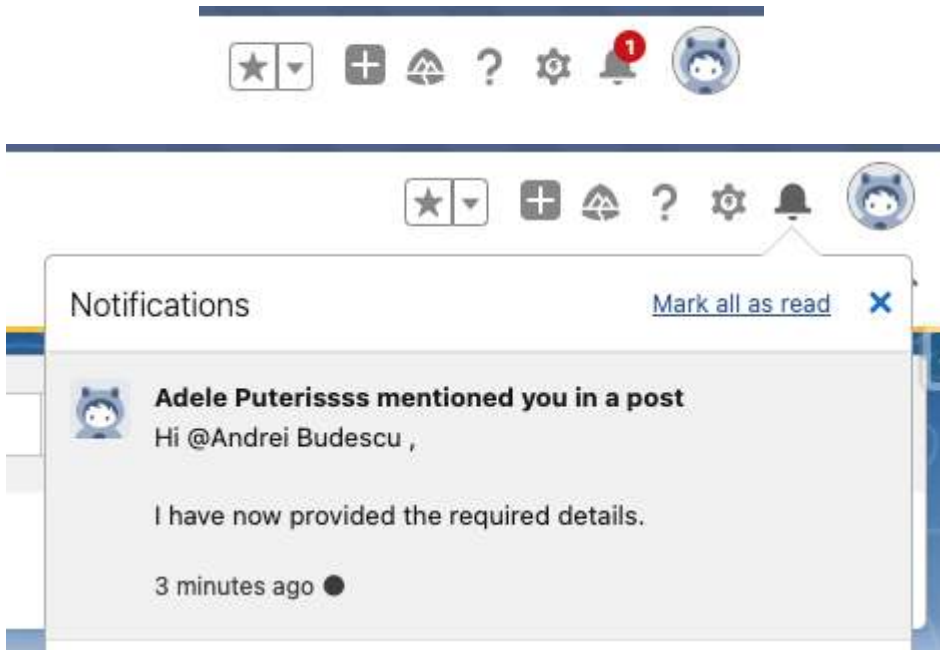
I have now provided the required details.

👍 Like 💬 Comment

[Share](#)

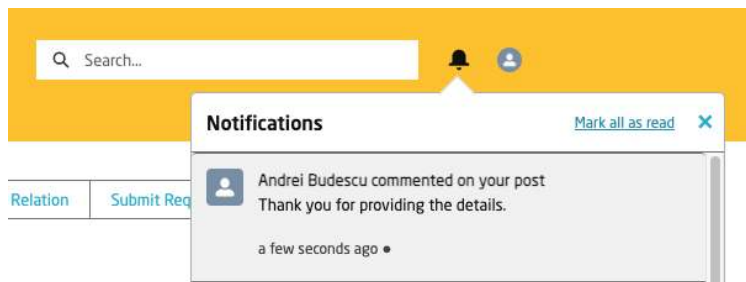
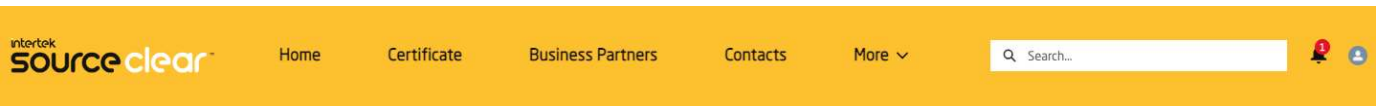
Chatter Post Notification - Guidance:

When a user is mentioned on a post on a Scope Certificate record's Chatter Feed, this receives a custom notification.



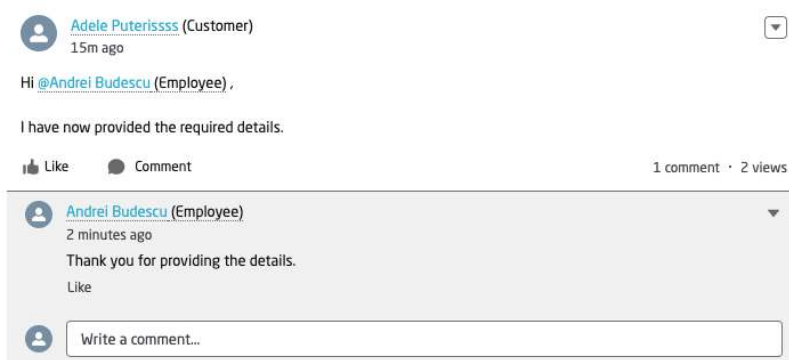
Once the post has been shared on the feed, the Internal User mentioned on the post will receive a notification and can be viewed from the Bell notification icon.

The user can now click on the Notification and will be redirected to the notification record page and will be able to answer to the client user.



Client user receives the notification from the Internal User's reply.

The reply can be accessed by clicking on the notification received or can be viewed on the Scope Certificate's Chatter Feed.



History Tracking - Guidance:

The Chatter Feed displays information about the changes of the Status of a Scope Certificate.

Certificate C-000020

Status: Submitted | Record Type: Scope Certificate

Buttons: + Follow, New Business Partner Relation, Submit Request, Clone Scope Certificate

Progress: Submitted (Active) | Audit Completed | Approved | Rejected | Suspended | Withdrawn/Ter... | Archive | Expired | Mark Status as Complete

Information

Certified Company	ADELE DEMO SPA	Certificate Name	C-000020
Contact	Adele Puteri	Owner	SCTC CS Rep Queue
Project Type		Related scope certificate	
Initial certification		Status	Submitted
Reference Standards	CCS;GOTS;GRS	Sub-Status	
Program Name			
Status Comments			

Customer Information

Process with Chemicals	Yes	Other Services	Yes
Quantity of chemicals used	More than 5	Other Services- Describe	Social audit
Standard history		Your Company's Tax ID	12345654321

Certificate Dates

Certificate Initial Date	10/05/2022	Certificate Issue Date	10/05/2022
Certificate Expiry Date	10/05/2023	Audit Completion Date	10/05/2023

Claim forms

Please use the links below to download the claim form:

- Claim form: Textile Exchange
- Claim form: GOTS

RELATED CHATTER

Post: [Empty]

Share an update... [Share]

Sort by: Latest Posts | Search this feed... | [Filter] | [Refresh]

Andrei Budescu (Employee) updated this record. Just now

Status: Pending to Submitted

[Like] [Comment]

The Chatter Post describes the status change and stores information about who performed it.

Status Comment Substatus - Guidance:

When a Scope Certificate's Status has been updated, the External User can see what is the reason for the current status.

If the Status has been updated to Withdrawn / Terminated, the user can see the reason in the Substatus field.

Certificate C-0000564

Status: Withdrawn/Terminated | Record Type: Scope Certificate

Buttons: + Follow, New Business Partner Relation, Submit Request, Clone Scope Certificate

Progress: [Previous Steps] | Withdrawn/Ter... (Active) | Archive | Expired | Mark Status as Complete

Information

Certified Company	ADELE DEMO SPA	Certificate Name	C-0000564
Contact	Adele Puteri	Owner	Milena Lopez
Project Type		Related scope certificate	
Initial certification		Status	Withdrawn/Terminated
Reference Standards		Sub-Status	Withdrawal by Intertek
Program Name			
Status Comments	Status reason comments.		

Customer Information

Claim forms

Please use the links below to download the claim form:

- Claim form: Textile Exchange
- Claim form: GOTS

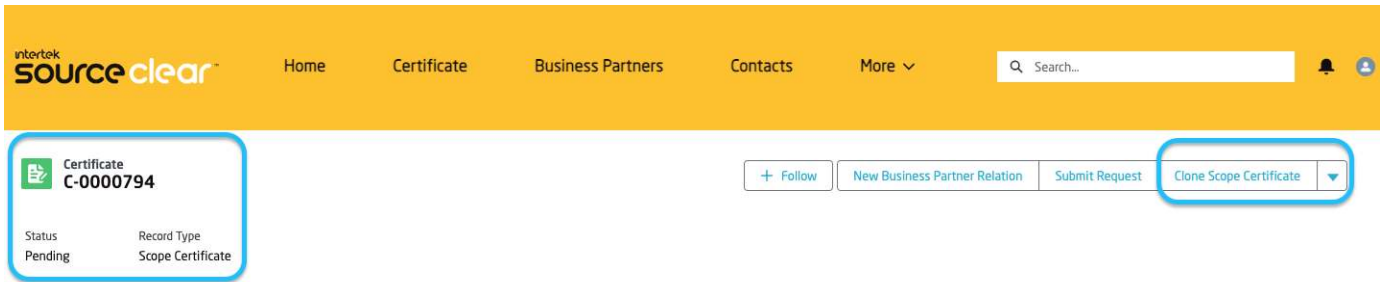
RELATED CHATTER

Claim Approval Requests (3)

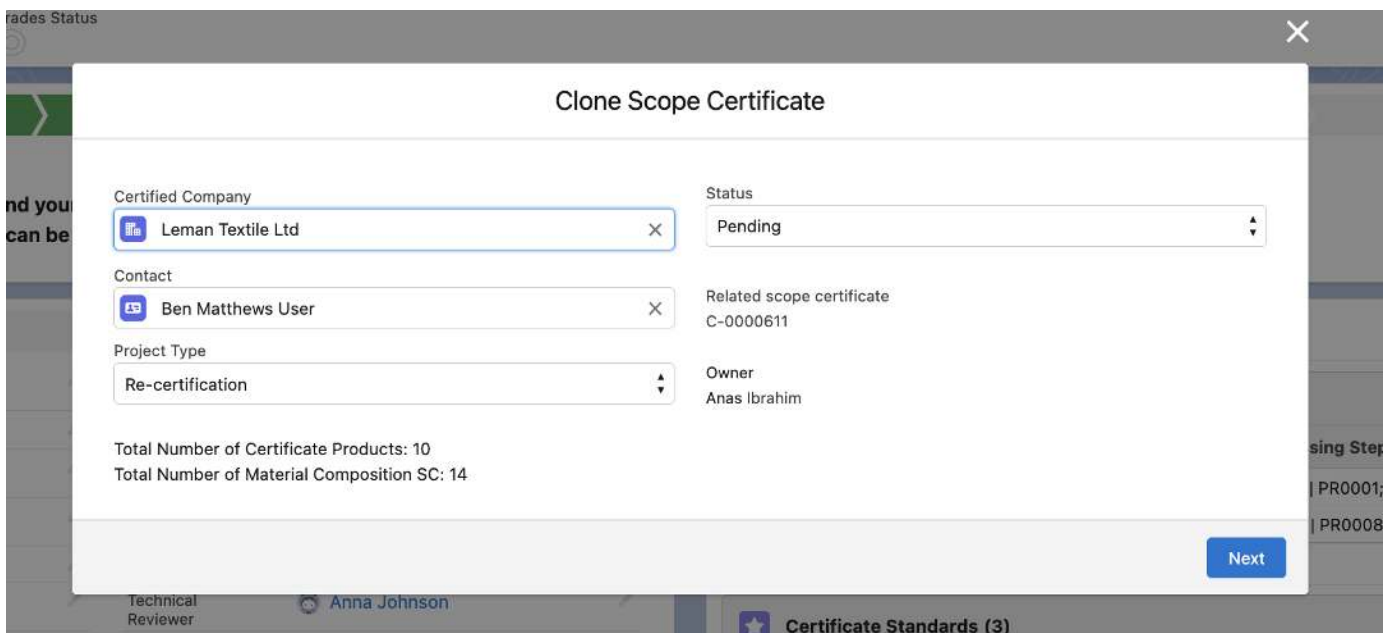
Claim Approval Reque...	Status	Details of Decision	Client Comments
-------------------------	--------	---------------------	-----------------

Clone Scope Certificate - Guidance:

The functionality to clone a Certificate is only present on the Scope Certificate records.



Click on the [Clone Scope Certificate](#) button and confirm the details of the new cloned Scope Certificate.



The Certified Company and Contact fields are pre-populated with the values from the original Scope Certificate.

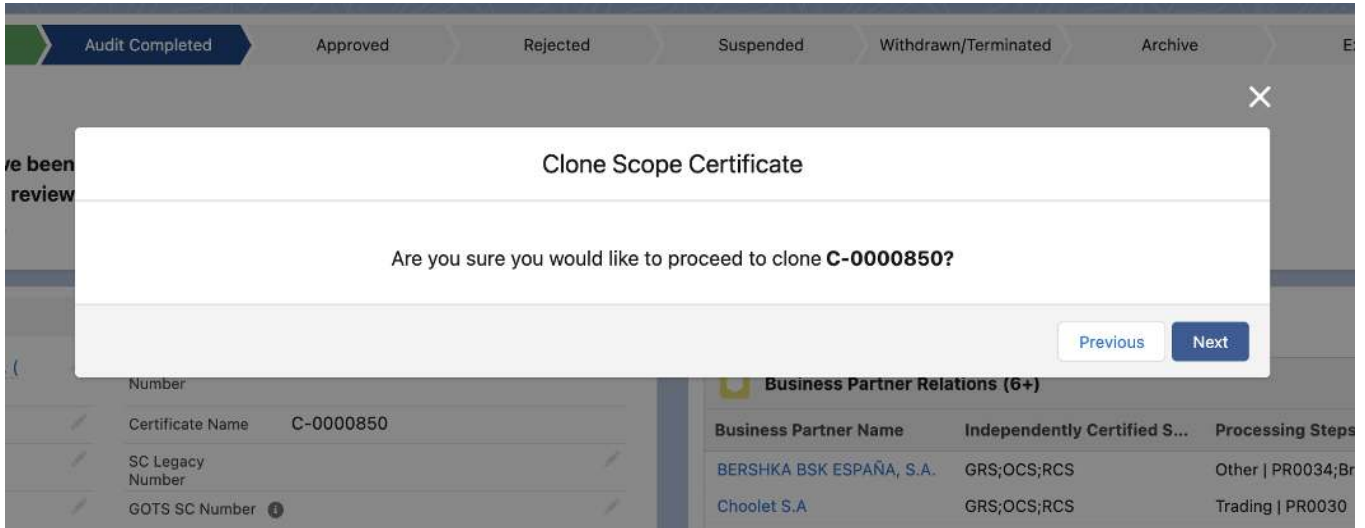
Once the Project Type and Status are defined, click on the [Save](#) button.

Clone Scope Certificate - Guidance:

The amount of total products and material compositions will now be displayed on the initial screen.

Clone Scope Certificate - Guidance:

There will be a confirmation screen so that the user can make sure they would like to proceed.



SCENARIO 1:

If the certificate has a large number of Products/Material compositions, the clone feature will perform a asynchronous (background) process that may take a few minutes.

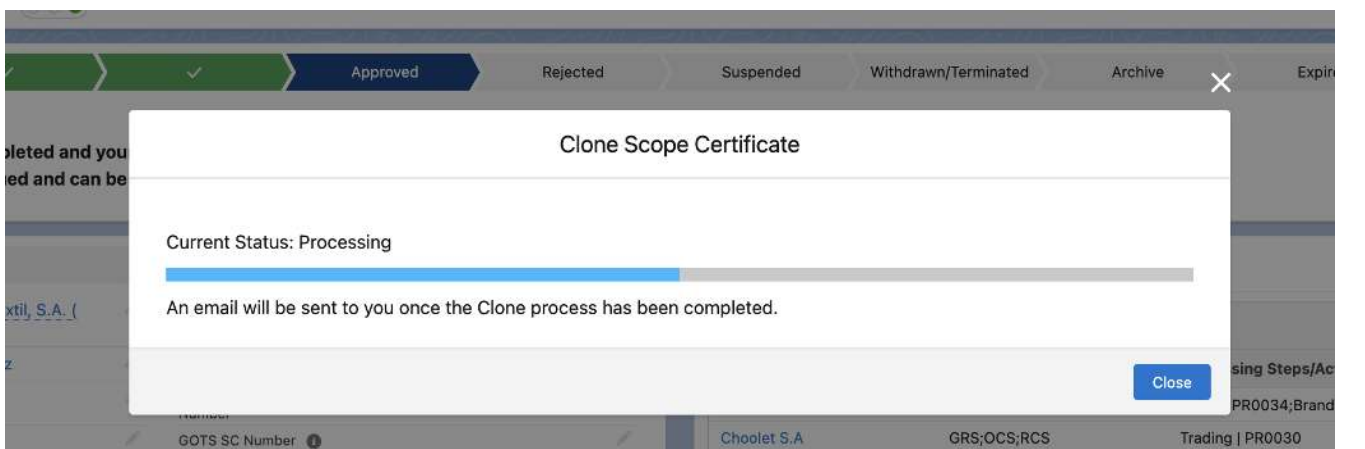
The user can close the clone screen and continue with their activity.

An **email** will be sent to the user once the clone is complete with a link to the new certificate. Please check your spam folder for the email.

Additionally, you can locate the Certificate in the 'Child Certificates' component on the original Scope Certificate.

Clone Scope Certificate - Guidance:

A progress screen will be displayed displaying the status of the clone activity which the user can wait or close.



SCENARIO 2:

If the certificate does not have a large number of products/Material compositions, then the synchronous process will trigger and it will clone immediately.

There will be no progress bar and the user will be redirected to the new cloned certificate when the clone feature is completed.



Clone Scope Certificate - Guidance:

If the original Scope Certificate has bad data the clone will be successful but the certificate will not be able to be approved until the bad data has been resolved.

Some Bad Data examples:

- If a certificate product does not have any product facilities.
- If a certificate product has no Material Composition record that has a certified attribute.

The cloned Scope Certificate is related to the original Scope Certificate via the Related scope certificate field.

You can find the new Scope Certificate created under the related list called Child Certificates of the original Scope Certificate.

Child Certificates (1) New			
Certificate Name	Status	Certificate Issue Date	Record Type
C-0000795	Pending		Scope Certificate ▼
View All			

Clone Scope Certificate - Guidance:

In addition to the existing Scope Certificate cloning functionality we have implemented a series of items to also be cloned along the previously defined details.

Original Scope Certificate

Certificate
C-0000794

Status: Approved Record Type: Scope Certificate

+ Follow
New Business Partner Relation
Submit Request
Clone Scope Certificate ▼

▼
Approved
Rejected
Suspended
Withdrawn/Ter...
Archive
Expired
Mark Status as Complete

Guidance for Success

- The technical review has been completed and your certification request has been approved.
- The Scope Certificate has been issued and can be downloaded from the files section.

Information

Certified Company: [ADELE DEMO SPA](#)

Contact: [Adele Puteri](#)

Project Type: Re-certification

Reference Standards: **RAS,RCS,RMS**

Program Name: RAF

Status Comments:

Customer Information

Process with Chemicals: 0

Quantity of chemicals used: 0

Standard history: 0

Certificate Dates

Certificate Initial Date: 23/04/2023

Certificate Expiry Date:

Other

Have you used a Consultant? Yes

System Information

Created By: [Adele Puterissss](#), 21/04/2023 15:48

Certificate Name: C-0000794

Owner: [Adele Puterissss](#)

Related scope certificate: 0

Status: Approved

Sub-Status:

Other Services: 0

Other Services- Describe: 0

Your Company's Tax ID: 0

Certificate Issue Date: 23/04/2023

Audit Completion Date:

Consultant Name, If Used:

Last Modified By: [Andrei Budescu](#), 23/04/2023 17:44

Claim forms

Please use the links below to download the claim form:

Claim form: Textile Exchange

Claim form: GOTS

RELATED CHATTER

Claim Approval Requests (0)

Activity History (0)

Business Partner Relations (1)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
MILENA	GRS,OCS	No processing PR000...	Facility

[View All](#)

Certificate Standards (3) New

Certificate Standard N...	Certified weight (Kg)	Reference Standard	Standard Version
CS-0210	0.00	RCS	2.0
CS-0211	0.00	RAS	1.0
CS-0212	0.00	RMS	1.2

[View All](#)

Certificate Products (1) New

Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8662	Men's apparel PC0001...		

[View All](#)

Cloned Scope Certificate

Certificate
C-0000795

+ Follow New Business Partner Relation Submit Request Clone Scope Certificate ▾

Status: Pending Record Type: Scope Certificate

▾
Pending
Submitted
Audit Completed
Approved
Rejected
Suspended
Withdrawn/Ter..
Archive
Expired
✓ Mark Status as Complete

Key Fields Edit

Certified Company
[ADELE DEMO SPA](#) ✓

Project Type
Re-certification ✓

Reference Standard

Guidance for Success

- This status is used to provide all the information required for Scope Certificates.
- Make sure all key fields are populated.
- Add products using the Certificate Products section.
- Add facilities and sub-contractors using the Business Partner Relations section. Indicate number of employees for GRS applications.
- Please indicate if you are using consultants.
- For any certified entities you must provide License number and certificate expiry date.
- Add details to the customer information section; fields related to process with chemicals must be completed only for GRS applications.
- Once the information is completed, please submit this request.

Information

Certified Company
[ADELE DEMO SPA](#) ✓

Contact
[Adele Puteri](#) ✓

Project Type
Re-certification ✓

Reference Standards
RAS,RCS,RMS

Program Name
RAF ✓

Status Comments

Certificate Name
C-0000795

Owner
[Adele Puterissss](#) ✓

Related scope certificate
[C-0000794](#) ✓

Status
Pending ✓

Sub-Status

Customer Information

Process with Chemicals

Quantity of chemicals used

Standard history

Certificate Dates

Certificate Initial Date

Certificate Expiry Date

Other

Have you used a Consultant?
Yes ✓

System Information

Created By
[Adele Puterissss](#), 23/04/2023 17:44

Last Modified By
[Adele Puterissss](#), 23/04/2023 17:44

Claim forms

Please use the links below to download the claim form:

Claim form: Textile Exchange

Claim form: GOTS

RELATED CHATTER

Claim Approval Requests (0)

Activity History (0)

Business Partner Relations (1)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
MILENA	GRS,OCS	No processing PR000...	Facility ▾

[View All](#)

Certificate Standards (3) New

Certificate Standard N...	Certified Weight (Kg)	Reference Standard	Standard Version
CS-0213	0.00	RCS	2.0 ▾
CS-0214	0.00	RAS	1.0 ▾
CS-0215	0.00	RMS	1.2 ▾

[View All](#)

Certificate Products (1) New

Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8663	Men's apparel PC0001...		▾

[View All](#)

The related list of Certificate Standards are now cloned across to the new Scope Certificate.

Clone Scope Certificate Certificate Products & Standards - Guidance:
 This extension of the cloning functionality include also all the Material Composition SC cloned across for the Certificate Products, that means the Standards defined are also copied across and the Certificate Product Standards are created with the corresponding Label Grade from the original records.

Original Certificate Product

Certificate Product
P-8662
Edit

Scope Product

Product Category Men's apparel PC0001	Product Details Overcoats, jackets, vests PD0001
Certificate Product Name P-8662	Product Description SC Men's apparel PC0001 - Overcoats, jackets, vests PD0001 - 20% Recycled pre-consumer Acetate
Certificate C-0000794	Product Description Men's apparel PC0001 - Overcoats, jackets, vests PD0001 -
Product Status	Material Composition SC 20% Recycled pre-consumer Acetate
Geographic Origin Not Specified	Material Composition TC

Transaction Product

Invoice Number	Invoice Date
Invoices on Product	Trade name as on invoice

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5438	MILENA	Facility	Main

Material Composition SC's (1)

Material Compo...	Raw Material	Attribute type	Percentage rang...
MCSC-004335	Acetate	Recycled pre-con...	20%

Material Composition TC's (0)

Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000364	RCS	RCS 100	

Cloned Certificate Product

Certificate Product
P-8663
Edit

Scope Product

Product Category Men's apparel PC0001	Product Details Overcoats, jackets, vests PD0001
Certificate Product Name P-8663	Product Description SC Men's apparel PC0001 - Overcoats, jackets, vests PD0001 - 20% Recycled pre-consumer Acetate
Certificate C-0000795	Product Description Men's apparel PC0001 - Overcoats, jackets, vests PD0001 -
Product Status	Material Composition SC 20% Recycled pre-consumer Acetate
Geographic Origin Not Specified	Material Composition TC

Transaction Product

Invoice Number	Invoice Date
Invoices on Product	Trade name as on invoice

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5439	MILENA	Facility	Main

Material Composition SC's (1)

Material Compo...	Raw Material	Attribute type	Percentage rang...
MCSC-004336	Acetate	Recycled pre-con...	20%

Material Composition TC's (0)

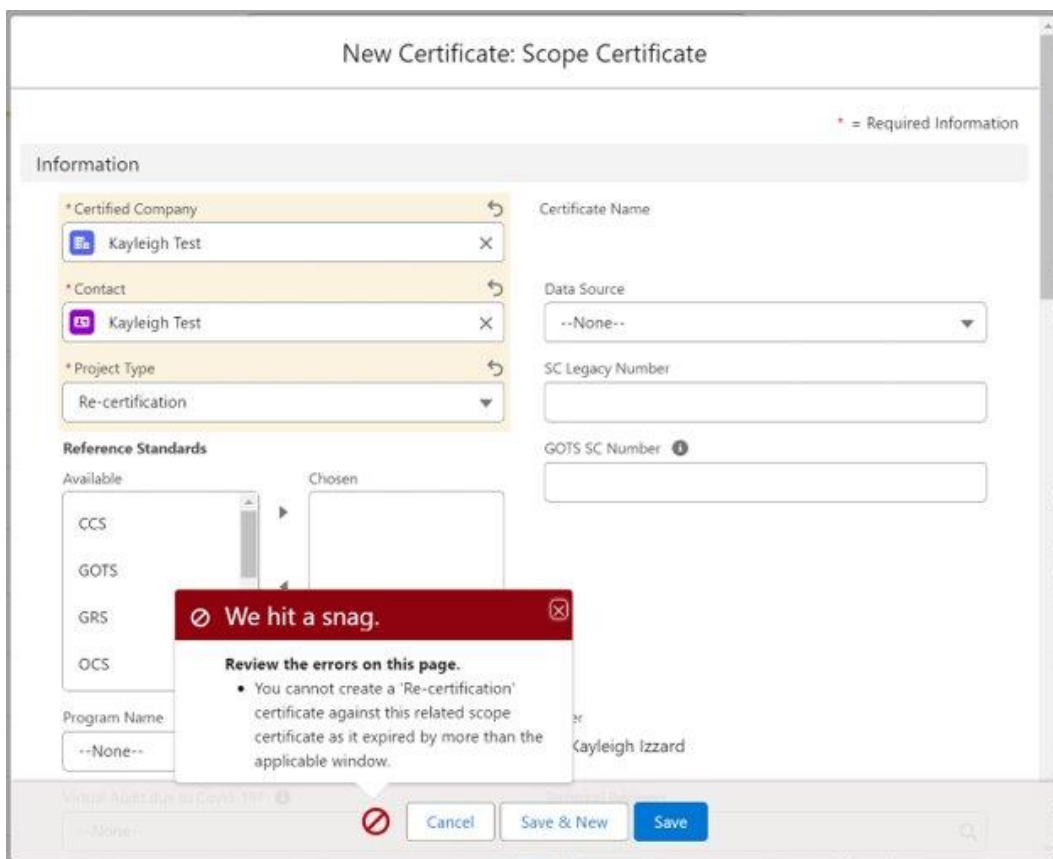
Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000365	RCS	RCS 100	

Re-certification Logic

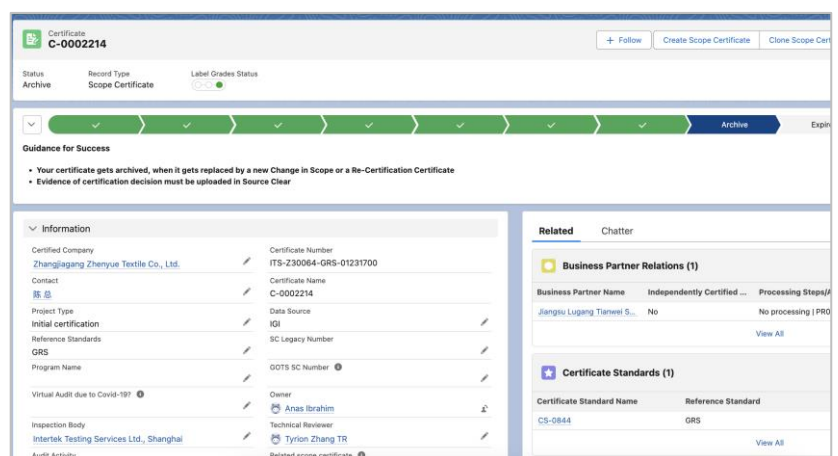
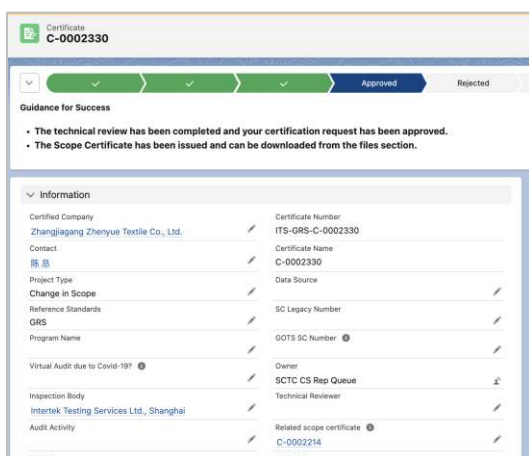
Validation to ensure scope certificates with a Project Type of 'Recertification' can only be created when the related Scope Certificate has a status of 'Expired' or 'Archived' AND the Related Scope Certificate has not expired beyond 180 days. This is to ensure there is only a single Scope Certificate for a given standard.

Error Message



Change in Scope Logic

Automation that when a Change in Scope SC is APPROVED, the related SC will be changed from Approved to Archived, automatically.



Transaction Certificate

Topics	Page Number
<ul style="list-style-type: none">1. Add standards to the certificate<ul style="list-style-type: none">a. Validation against the standards of the parent scope certificate2. Add products to the certificate<ul style="list-style-type: none">a. Filtering against the standards selected for the certificate3. Certified weight calculation<ul style="list-style-type: none">a. Per Raw Materialb. Per Certificate Product Standardc. Per Certificate Productd. Per Certificate Standard3. Certificate Product Validations<ul style="list-style-type: none">a. Number of transport documents validationb. 1000 products validation5. Business Partner Relations6. Status Comments and Substatus7. Chatter Interactions<ul style="list-style-type: none">a. Taggingb. Notifications	

Guidance: you will be required to manually add standards to the transaction certificate if the parent scope certificate is multi-standard. If the parent scope certificate is single-standard then the system automatically will add the standard to the new transaction certificate.

Navigate to the scope certificate, select **Related** section and search for **Child Certificates**. Click on **New** button to create a new transaction certificate.

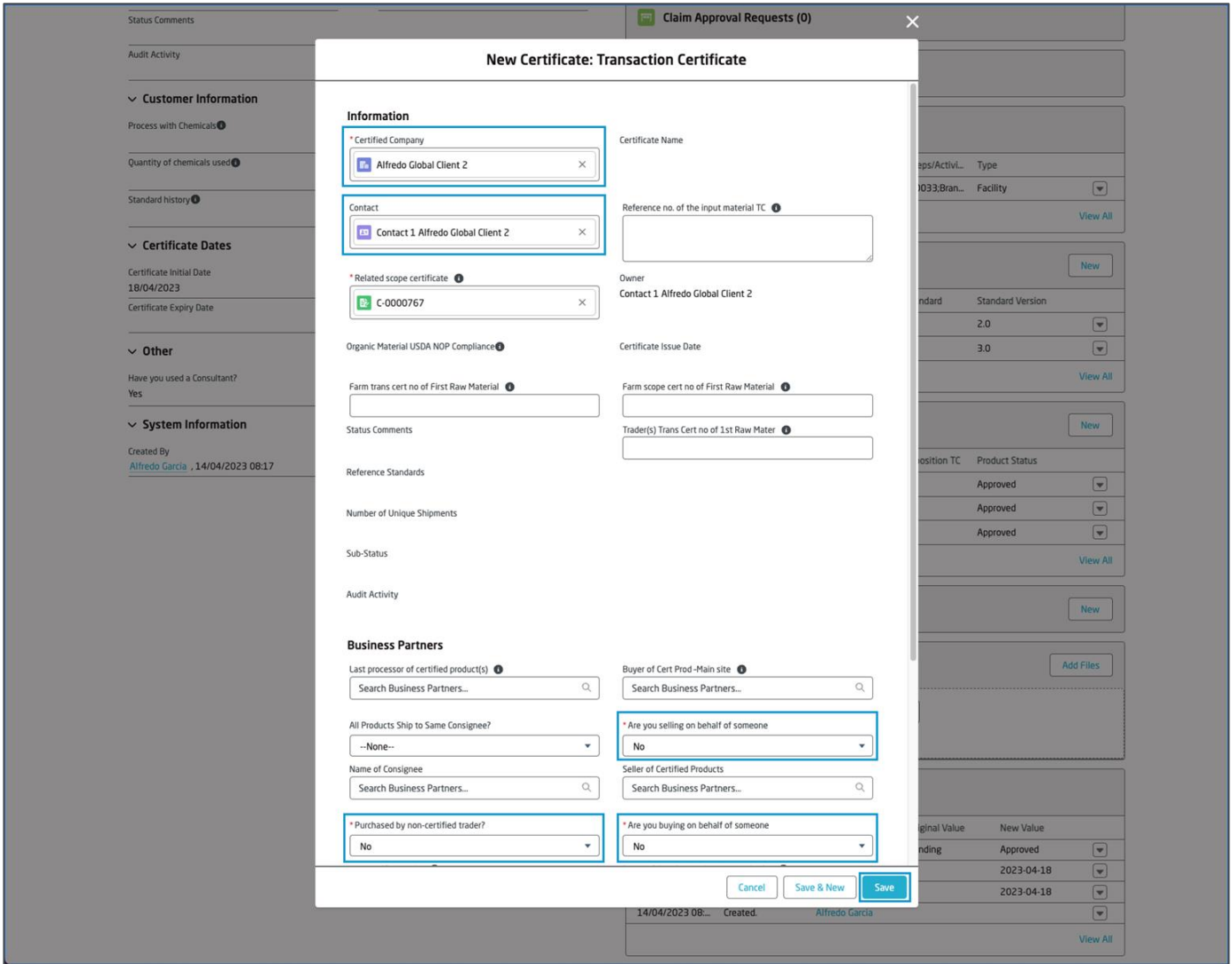
The screenshot displays a certificate record in the Source Clear system. At the top, there is a navigation bar with tabs for 'Approved', 'Rejected', 'Suspended', 'Withdrawn/Ter...', 'Archive', and 'Expired'. A 'Mark Status as Complete' button is also present. The main content area is divided into several sections:

- Information:** Includes fields for Certified Company (Alfredo Global Client 2), Certificate Name (C-0000767), Contact (Contact 1 Alfredo Global Client 2), Owner (Alfredo Garcia), Project Type (Initial certification), Reference Standards (OCS,RCS), Program Name, Status (Approved), and Sub-Status.
- Customer Information:** Includes Process with Chemicals, Quantity of chemicals used, Standard history, Other Services, and Your Company's Tax ID.
- Certificate Dates:** Includes Certificate Initial Date (18/04/2023), Certificate Expiry Date, Certificate Issue Date (18/04/2023), and Audit Completion Date.
- Other:** Includes a field for 'Have you used a Consultant?' (Yes).
- System Information:** Includes 'Created By' (Alfredo Garcia, 14/04/2023 08:17) and 'Last Modified By' (Alfredo Garcia, 18/04/2023 15:40).
- RELATED CHATTER:** This section is highlighted and contains several sub-sections:
 - Claim forms:** Includes buttons for 'Claim form: Textile Exchange' and 'Claim form: GOTS'.
 - Claim Approval Requests (0)**
 - Activity History (0)**
 - Business Partner Relations (1):** A table with columns: Business Partner Name, Independently Certified..., Processing Steps/Activi..., and Type. It lists 'Brand 1 Global Client 2' with 'Weaving | PR0033;Bran...' and 'Facility'.
 - Certificate Standards (2):** A table with columns: Certificate Standard N..., Certified Weight (Kg), Reference Standard, and Standard Version. It lists 'CS-0200' (0.00, RCS, 2.0) and 'CS-0201' (0.00, OCS, 3.0).
 - Certificate Products (3):** A table with columns: Certificate Product Na..., Product Description SC, Material Composition TC, and Product Status. It lists 'P-B655' (Unisex apparel | PC000...), 'P-B654' (Babies' apparel | PC000...), and 'P-B653' (Men's apparel | PC0001...).
 - Child Certificates (0):** This section is highlighted with a blue border and includes a 'New' button.
 - Files (0):** Includes an 'Add Files' button.

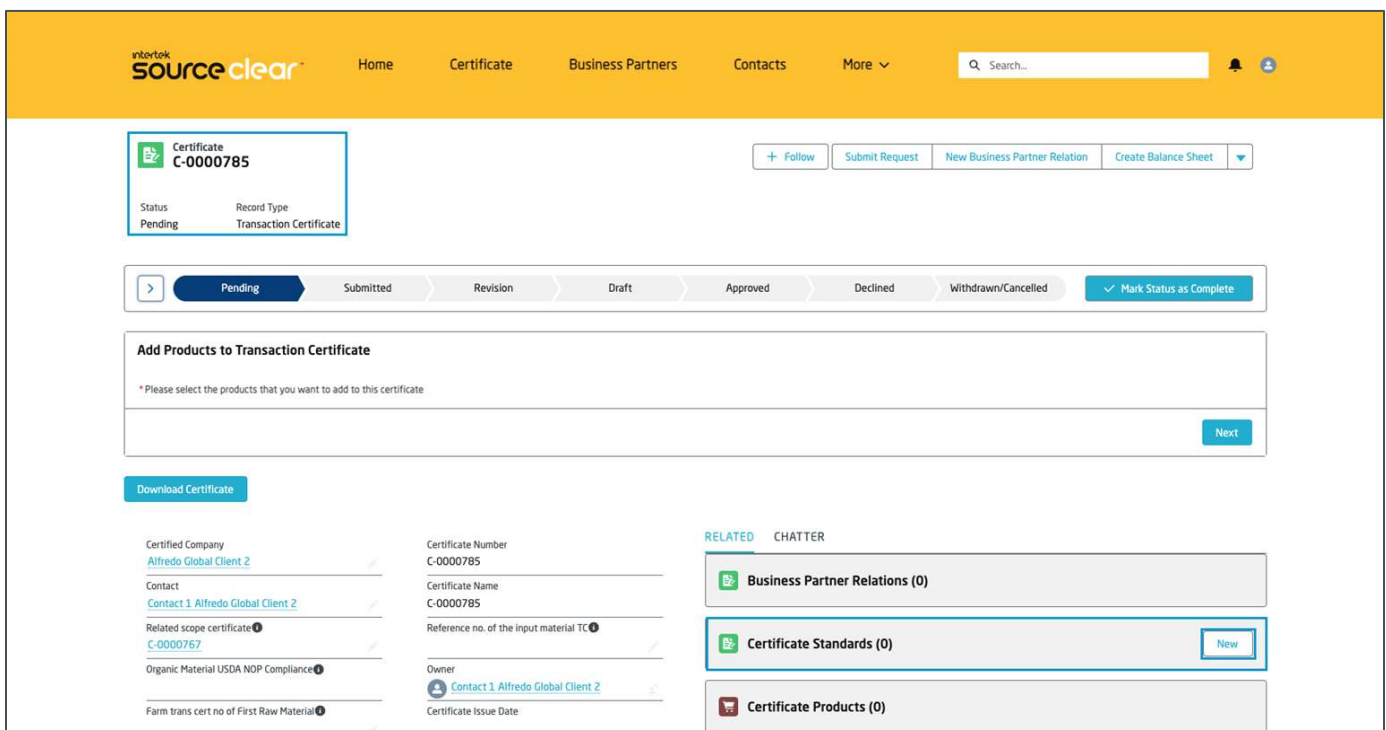
Select **Transaction Certificate** as the record type for the new certificate.

The screenshot shows a dialog box titled 'New Certificate' with a close button (X) in the top right corner. The dialog contains the text 'Select a record type' and two radio button options: 'Scope Certificate' and 'Transaction Certificate'. The 'Transaction Certificate' option is selected and highlighted with a blue border. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Next'.

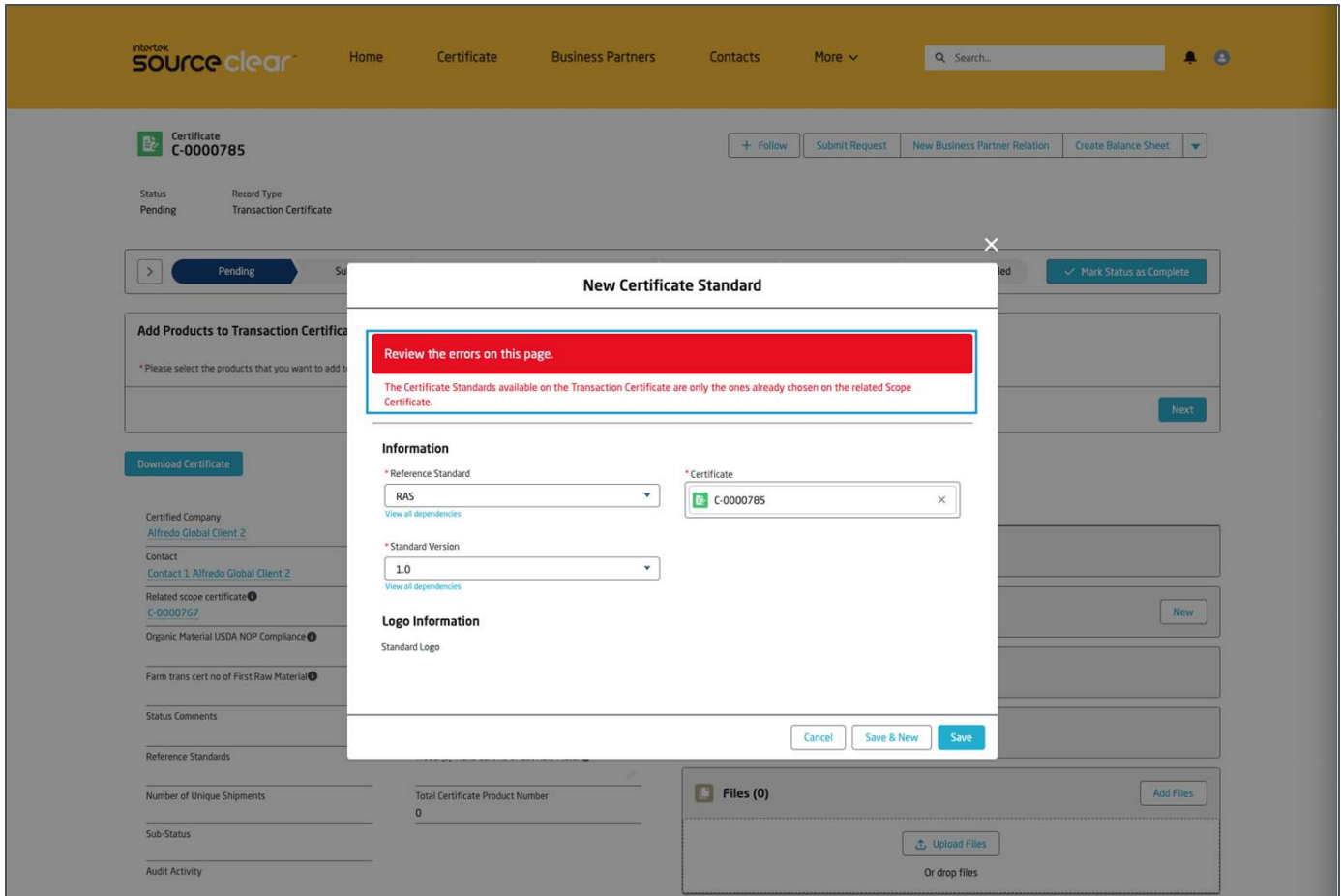
Complete all the required fields and save the certificate.



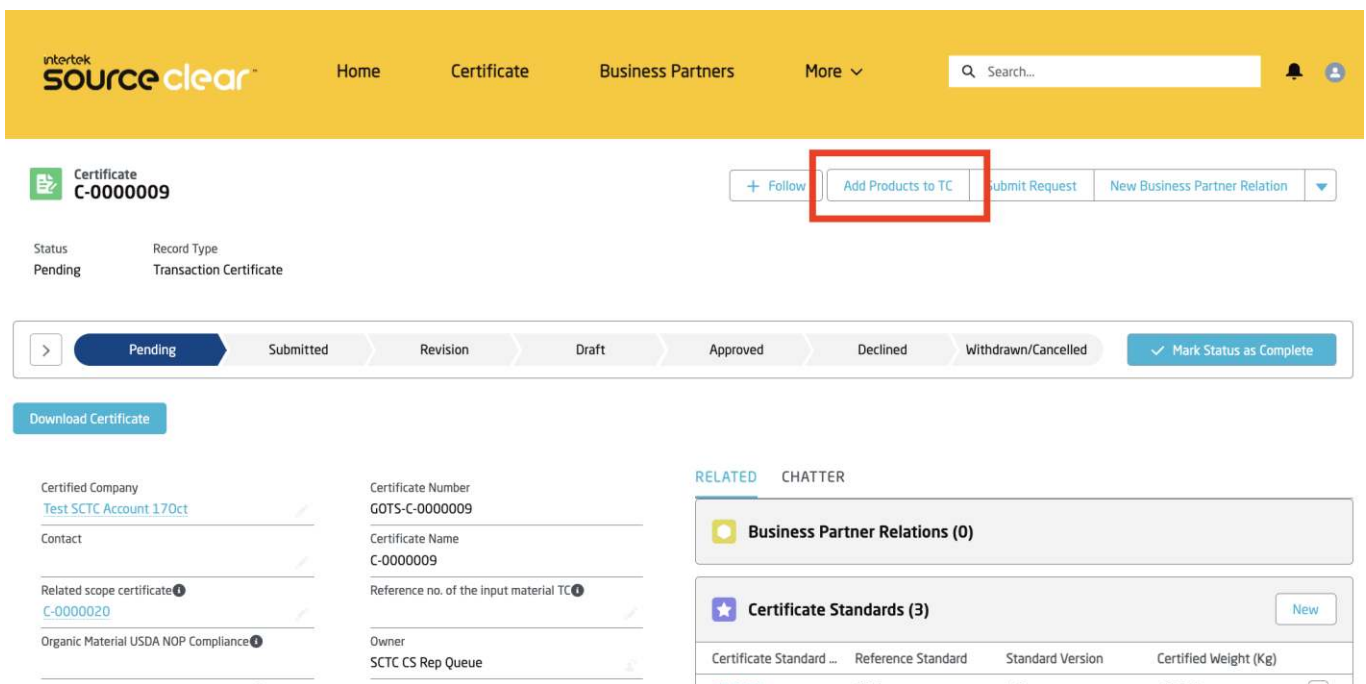
Navigate to the new transaction certificate, under **Related** you will see a module named **Certificate Standards**. Click on **New** button to add standards to your certificate.



Guidance: make sure the standard(s) you want to add to your transaction certificate are also related to the parent scope certificate, otherwise you will be presented with an error message.



Guidance: you will be able to add products to the transaction certificate once you have added at least one standard to it. The products available for you to add also depend on the standard(s) related to the certificate.



Go to the component [Add Products to Button](#), select the product(s) you want to add to the certificate from the [Add Products](#) button

The screenshot displays the 'Add Products to TC' interface. At the top, there is a navigation bar with 'Home', 'Certificate', and 'More' options, along with a search bar. Below this, the title 'Add Products to TC' is centered. The main content area is divided into two sections. The upper section provides a summary of the certificate with the following details:

Certificate Name	Certificate Number	Status	Reference Standards	All Products Ship to Same Consignee?	Name of Consignee
C-0000009	GOTS-C-0000009	Pending	CCS;GOTS;GRS		

Below the summary, a blue button labeled 'Add Products' is highlighted with a red box. The lower section contains a table of products already added to the certificate:

Certificate Product Name	Product Description SC	Material Composition TC	Product Status	Final Product
1 P-50830	Home textiles PC0010 - Towe...	50% Organic Bamboo, 25% Rec...		Yes
2 P-50826	Unisex apparel PC0005 - Over...	60% Content claimed Acetate [...]		Yes

At the bottom of the interface, there are several input fields for additional information, including 'Farm trans cert no of First Raw Material', 'Certificate Issue Date', 'Reference Standards' (set to CCS;GOTS;GRS), 'Farm scope cert no of First Raw Material', 'Number of Unique Shipments', and 'Trader(s) Trans Cert no of 1st Raw Mater'. On the right side, there is a table of standards with columns for standard ID, name, value, and cost:

CS-0081	GRS	4.0	497.20
CS-0083	CCS	2.0	250.80
CS-0084	GOTS	6.0	270.00

A 'View All' link is located at the bottom right of this table.

This is a summary screen that provides an overview of the Certificate itself with a detailed header along with the products that have already been added to the Transaction certificate.

You can modify the added products here by clicking the drop-down button on the right-hand side and make updates to all the product information.

When the Add Products button is clicked, a screen is presented that allows you to bulk add the invoice/transport number of the products. Products with the same Invoice/Transport number can be added in bulk or the process can be repeated for products with a different invoice/transport values.

1. Certificate Products From Scope Certificate

Invoice Number: Invoice Date: * Transport Document No: * Transport Document Date:

Number of products selected: 2 [Add Selected Products](#)

2. Advanced Search

Product Category: Product Details: Raw Material: Percentage: [Search](#)

	Certificate Product Name	Product Description SC	Product Category	Product Details	Final Product
1	<input checked="" type="checkbox"/> P-8476	Unisex apparel PC0005 - Over...	Unisex apparel PC0005	Overcoats, jackets, vests PD00...	Yes
2	<input checked="" type="checkbox"/> P-8276	Home textiles PC0010 - Towel...	Home textiles PC0010	Towels, kitchen linen, toilet line...	Yes
3	<input type="checkbox"/> P-8274	Children's apparel PC0004 - Pa...	Children's apparel PC0004	Pants, trousers PD0003	Yes

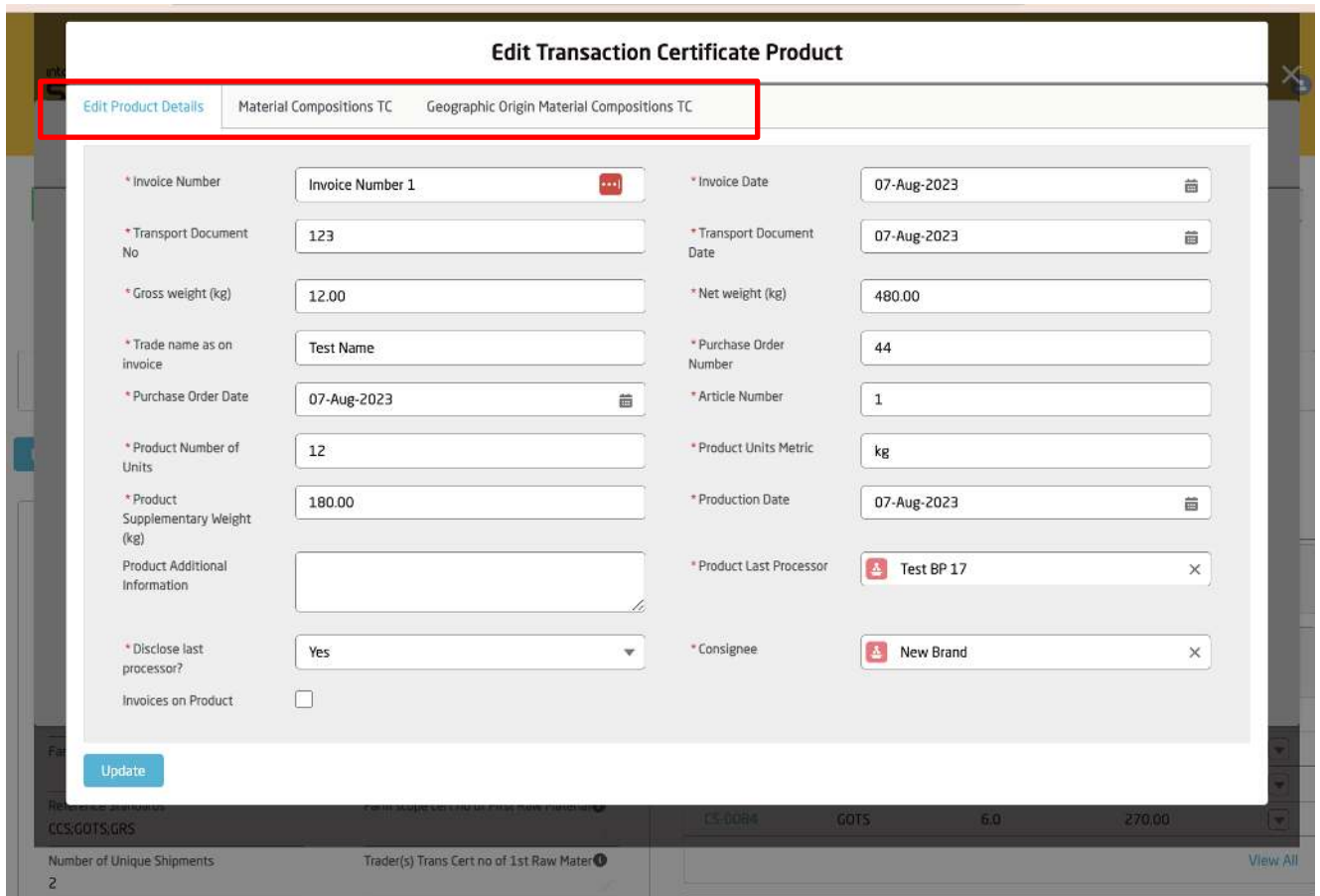
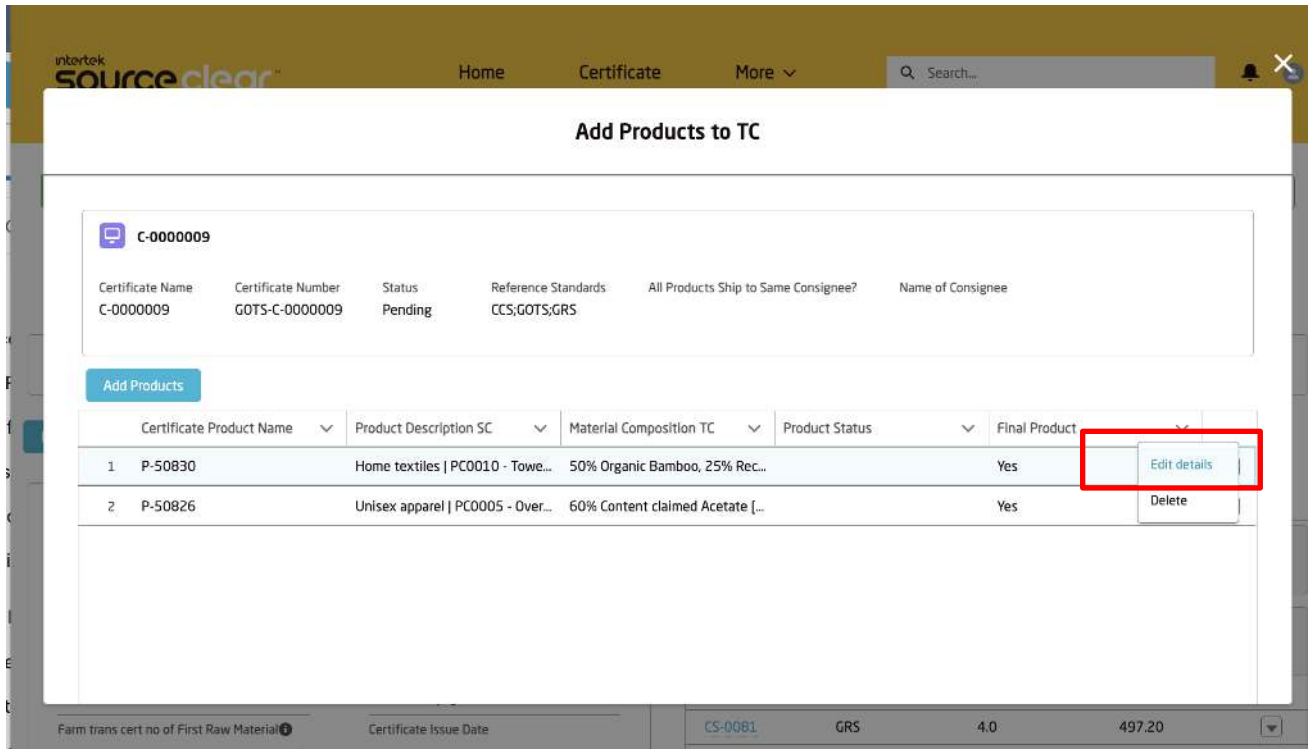
Reference Standards: CCS,GOTS,GRS | Farm scope cert no of First Raw Material: CS-0084 | CCS: 2.0 | 250.80 | GOTS: 6.0 | 270.00

Number of Unique Shipments: 2 | Trader(s) Trans Cert no of 1st Raw Mater: | Sub-Status: | Total Certificate Product Number: | [View All](#)

Note: In a scenario when there are more than 200 products associated to an SC, the user can use the advanced search option to filter the SC products by Product Category, Product Details, Raw Material and its Percentage (Or a combination of all attributes). The user can select multiple products and then click [Add Selected Products](#).

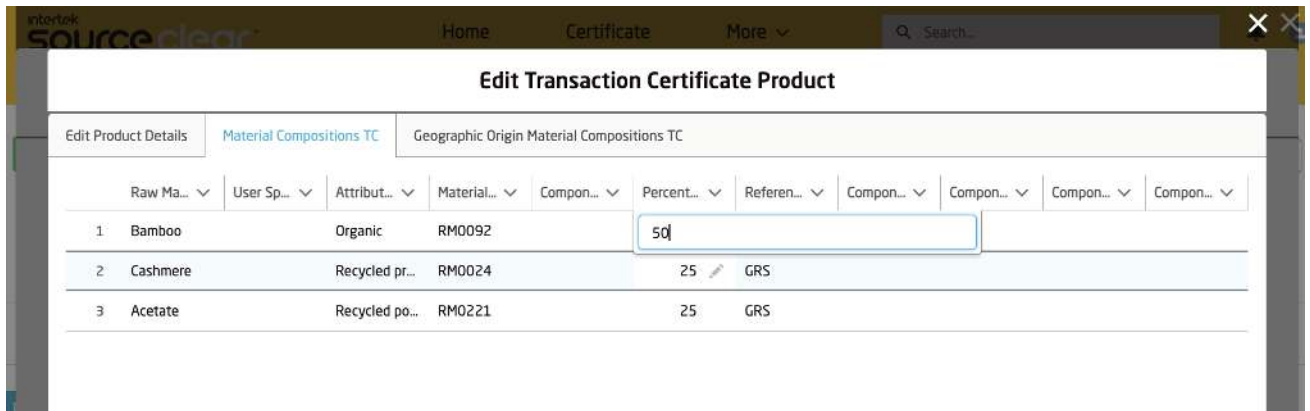
Guidance: For large certificates, multiple products can be selected even through pagination and navigating to the following product screens.

Once the product(s) have been added, navigate back to the summary screen and click **Edit details** on the product you would like to start adding information on.



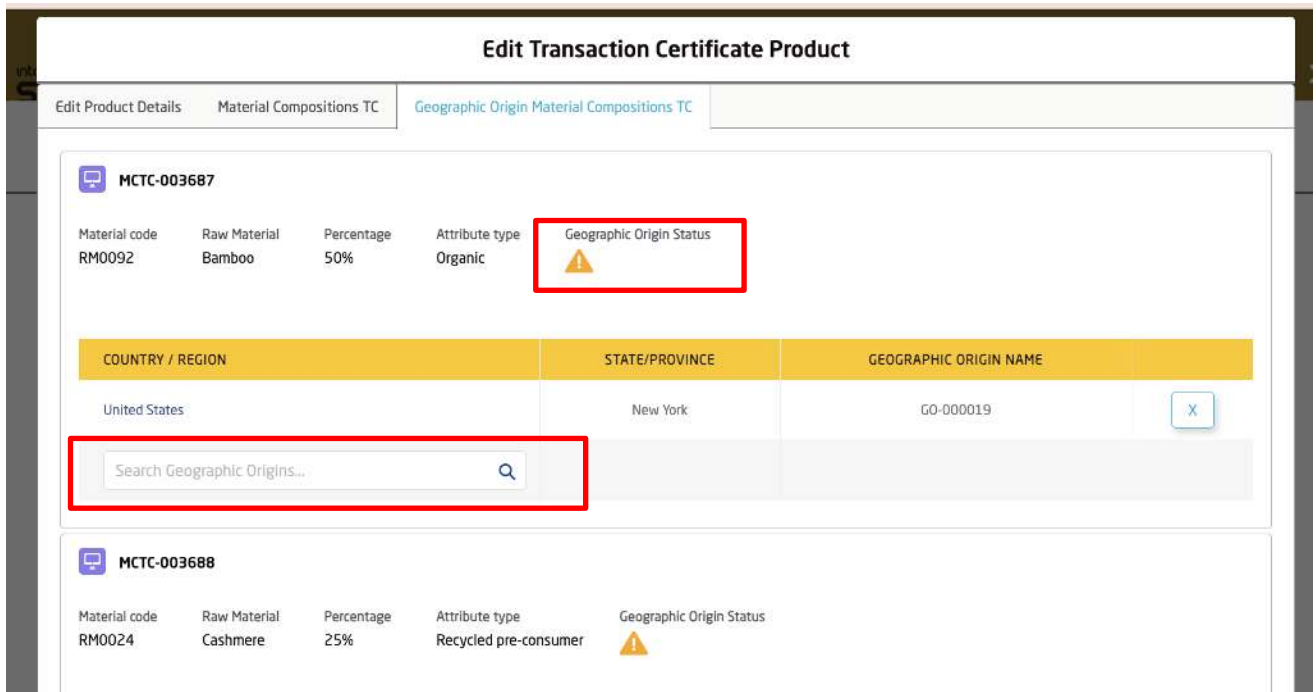
Guidance: There will be three tabs at the top to navigate through. Start by adding information on the product details tab first and move onto the next. There are validations on each tab to ensure the required information is added.

In the Material Composition Tab, you will be able to add the % composition for each row (Copied from the SC Product) using the **Pencil** icon next to the field.



Guidance: For SC products which are Final Product = Yes AND the Component field is populated, you will be able to enter information on the component fields in this screen and they will be mandatory.

Finally, once you have entered the Material Composition data, the last step for that product is to add the associated Geographic Origins.



Each Material Composition will have a separate component where the user can add the Geographic origins (GO). In the header there will be an icon that will prompt the user whether the GO is required or optional.

Search the state/City in the field and it will be added.

Repeat the process from the summary screen to add all the relevant details for all the products and when the process is completed, the screen can be closed and the Certificate record will have all the product and the added data created in the related lists.

Certified Company
[Alfredo Global Client 2](#) ✓

Contact
[Contact 1 Alfredo Global Client 2](#) ✓

Related scope certificate ①
[C-0000767](#) ✓

Organic Material USDA NOP Compliance ①

Farm trans cert no of First Raw Material ①

Status Comments

Reference Standards
OCS/RCS

Number of Unique Shipments
1

Sub-Status

Audit Activity

▼ **Business Partners**

Last processor of certified product(s) ①

All Products Ship to Same Consignee?

Name of Consignee

Certificate Number
ITS-RCS-OCS--C-0000785

Certificate Name
C-0000785

Reference no. of the input material TC ①

Owner
[Contact 1 Alfredo Global Client 2](#) ✓

Certificate Issue Date

Farm scope cert no of First Raw Material ①

Trader(s) Trans Cert no of 1st Raw Mater ①

Total Certificate Product Number
2

Buyer of Cert Prod -Main site ①

Are you selling on behalf of someone
No ✓

Seller of Certified Products

RELATED CHATTER

Business Partner Relations (2)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
Alfredo Buyer	No		Buyer
Alfredo Consignee	No		Consignee

[View All](#)

Certificate Standards (2) [New](#)

Certificate Standard N...	Reference Standard	Standard Version	Certified Weight (Kg)
CS-0202	RCS	2.0	103.00
CS-0203	OCS	3.0	113.00

[View All](#)

Certificate Products (2)

Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8657	Babies' apparel PC000...	100% Recycled post-co...	
P-8656	Men's apparel PC0001...	100% Organic Cotton	

[View All](#)

Guidance: Before the Certificate is submitted, the user can launch the screen again and modify the product information or make changes to the material compositions which will automatically update the calculated certified weights.

Navigate to any of the certificate products in your transaction certificate.

Certificate
C-0000785

Status: Pending Record Type: Transaction Certificate

[+ Follow](#) [Submit Request](#) [New Business Partner Relation](#) [Create Balance Sheet](#)

Pending
Submitted
Revision
Draft
Approved
Declined
Withdrawn/Cancelled
Mark Status as Complete

Add Products to Transaction Certificate

* Please select the products that you want to add to this certificate

Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton

Babies' apparel | PC0003 - Pants, trousers | PD0003 - 100% Recycled post-consumer Alpaca

Unisex apparel | PC0005 - Suits, suit- pants | PD0002 - 50% Organic Bamboo, 50% Recycled post-consumer Feather

[Next](#)

[Download Certificate](#)

Certified Company
[Alfredo Global Client 2](#)

Contact
[Contact 1 Alfredo Global Client 2](#)

Related scope certificate
[C-0000767](#)

Organic Material USDA NOP Compliance

Farm trans cert no of First Raw Material

Status Comments

Reference Standards
OCS,RCS

Number of Unique Shipments
1

Sub-Status

Audit Activity

Business Partners

Last processor of certified product(s)

All Products Ship to Same Consignee?

Name of Consignee

Certificate Number
ITS-RCS-OCS-C-0000785

Certificate Name
C-0000785

Reference no. of the input material TC

Owner
[Contact 1 Alfredo Global Client 2](#)

Certificate Issue Date

Farm scope cert no of First Raw Material

Trader(s) Trans Cert no of 1st Raw Mater

Total Certificate Product Number
2

Buyer of Cert Prod -Main site

Are you selling on behalf of someone
No

Seller of Certified Products

RELATED CHATTER

Business Partner Relations (2)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
Alfredo Buyer	No		Buyer
Alfredo Consignee	No		Consignee

[View All](#)

Certificate Standards (2)

Certificate Standard N...	Reference Standard	Standard Version	Certified Weight (Kg)
CS-0202	RCS	2.0	103.00
CS-0203	OCS	3.0	113.00

[View All](#)

Certificate Products (2)

Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8657	Babies' apparel PC000...	100% Recycled post-co...	
P-8656	Men's apparel PC0001...	100% Organic Cotton	

[View All](#)

Within the certificate product navigate to any **Material Composition TC** record.

Home Certificate Business Partners Contacts More

Certificate Product
P-8656

[Edit](#)

Scope Product

Product Category
Men's apparel | PC0001

Product Category - User Specific Terms

Certificate Product Name
P-8656

Certificate
[C-0000785](#)

Product Status

Geographic Origin Not Specified

Final Product
Yes

Composition Type SC

Transaction Product

Invoice Number
123

Invoices on Product

Product Details
Overcoats, jackets, vests | PD0001

Product Details - User Specific Terms

Product Description SC
Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton

Product Description
Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton

Material Composition SC
100% Organic Cotton

Material Composition TC
100% Organic Cotton

Invoice Date
19/04/2023

Trade name as on invoice Supplier

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5431	Brand 1 Global CL...	Facility	Facility

[View All](#)

Material Composition SC's (0)

Material Composition TC's (1)

Material Compo...	Raw Material	Attribute type	Reference Stand...
MCTC-001676	Cotton	Organic	OCS

[View All](#)

Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000360	OCS	OCS 100	113.00

[View All](#)

The certified weight for the material composition record is calculated in the field **Raw Material Certified Weight (kg)**.

Material Composition TC
MCTC-001676

Certificate Product: P-8656

Attribute Type Displayed on Certificate: Organic

Raw Material Displayed on Certificate: Cotton

Material Composition TC

Raw Material: Cotton

Percentage: 100%

Material code: RM0104

Component Net Shipping Weight (kg)

Component Supplementary Weight (kg)

Component Certified Weight (kg)

Certified Raw Material

Raw Material Certified Weight (kg): 113.00

System Information

Created By: Contact 1 Alfredo Global Client 2, 19/04/2023 12:56

Last Modified By: Contact 1 Alfredo Global Client 2, 19/04/2023 13:36

Guidance: the certified weight is calculated based on the following formula:

$$\frac{\text{Net Weight of Certificate Product} - \text{Supplementary Weight of Certified Product}}{\text{Percentage of Material Composition TC}}$$

Navigate back to the product, in the section **Certificate Product Standards** you will find a record for each standard and the certified weight calculated.

Certificate Product
P-8656

Scope Product

Product Category: Men's apparel | PC0001

Certificate Product Name: P-8656

Certificate: C-000785

Product Status:

Geographic Origin Not Specified:

Final Product: Yes

Composition Type SC:

Transaction Product

Invoice Number: 123

Invoices on Product:

Product Details

Product Category: Men's apparel | PC0001

Product Description SC: Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton

Material Composition SC: 100% Organic Cotton

Material Composition TC: 100% Organic Cotton

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5431	Brand 1 Global CL	Facility	Facility

Material Composition SC's (0)

Material Composition TC's (1)

Material Compo...	Raw Material	Attribute type	Reference Stand...
MCTC-001676	Cotton	Organic	OCS

Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000360	OCS	OCS 100	113.00

Guidance: the certified weight for the product standard is the summary of the **Raw Material Certified Weight** of all material composition for that same standard.

Within the certificate product search for the field **Certified Weight (Kg)**, the system calculates this value based on the certified weight of all **Certificate Product Standard** records related to the product.

intertek sourceclear Home Certificate Business Partners Contacts More

Certificate Product P-8656 [Edit](#)

Scope Product

Product Category: Men's apparel | PC0001
 Certificate: C-0000785
 Final Product: Yes
 Composition Type SC: 1

Transaction Product

Invoice Number: 123
 Article Number: 123
 Purchase Order Number: 123
 Transport Document No: 123
 Consignee: Alfredo Consignee
 Production Date: 19/04/2023

Product Details

Product Category - User Specific Terms: Overcoats, jackets, vests | PD0001
 Product Description SC: Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton
 Material Composition SC: 100% Organic Cotton
 Material Composition TC: 100% Organic Cotton

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5431	Brand 1 Global CL...	Facility	Facility

Material Composition SC's (0)

Material Composition TC's (1)

Material Compo...	Raw Material	Attribute type	Reference Stand...
MCTC-001676	Cotton	Organic	OCS

Certificate Product Standards (1)

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight...
CPS-000360	OCS	OCS 100	113.00

Files (0)

Certificate Product History (1)

Date	Field	User	Original Value	New Value
19/04/202...	Created	Contact 1 AL...		

Guidance: just a little recap on how the certified weights are calculated

- **Material Composition** certified weight is calculated based on product's net weight (manual input), product's supplementary weight (manual input) and material's percentage (manual input)
- **Product Standard** certified weight is calculated based on the certified weight of all material compositions for the same standard.
- **Product** certified weight is the summary of all certified weights of all standards for the product.

Update either the **Net weight** or the **Supplementary weight** in the product and see how the certified weights change.

Certificate Product P-8656 Edit

Scope Product

Product Category: Men's apparel | PC0001
 Certificate Product Name: P-8656
 Certificate: [C-0000785](#)
 Product Status:
 Geographic Origin Not Specified:
 Final Product: Yes
 Composition Type SC:
 Product Details: Overcoats, jackets, vests | PD0001
 Product Description SC: Men's apparel | PC0001 - Overcoats, jackets, vests | 100% Organic Cotton
 Material Composition SC: 100% Organic Cotton
 Material Composition TC: 100% Organic Cotton

Transaction Product

Invoice Number: 123
 Article Number: 123
 Purchase Order Number: 123
 Transport Document No: 123
 Consignee: [Alfredo Consignee](#)
 Production Date: 19/04/2023
 Invoice Date: 19/04/2023
 Supplier:
 Purchase Order Date: 19/04/2023
 Transport Document Date: 19/04/2023
 Certified Weight (kg): 135.00 (Automated calculation by the system)
 Gross weight (kg): 123.00
 Net weight (kg): 150.00 (Manual input by user)
 Product Supplementary Weight (kg): 15.00
 Product Number of Units: 100
 Product Units Metric: MZ
 Product Last Processor: [Brand 1 Global Client 2](#)
 Disclose last processor?: Yes

Product Facilities (1)

Product Facility...	Business Partner...	Type	Type of Relation
PF-5431	Brand 1 Global Cl...	Facility	Facility

Material Composition SC's (0)

Material Composition TC's (1)

Material Compo...	Raw Material	Attribute type	Reference Stand...
MCTC-001676	Cotton	Organic	OCS

Certificate Product Standards (1) *Automated calculation by the system*

Certificate Prod...	Reference Stand...	Label Grade	Certified Weight ...
CPS-000360	OCS	OCS 100	135.00

Files (0)

Certificate Product History (1)

Date	Field	User	Original Value	New Value
19/04/202...	Created.	Contact 1 Al...		

Navigate back to the certificate record, within the **Certificate Standards** section you will see the certified weight for each standard related to the certificate.

Certificate C-0000785 + Follow Submit Request New Business Partner Relation Create Balance Sheet

Status: Pending | Record Type: Transaction Certificate

Progress: Pending (selected) | Submitted | Revision | Draft | Approved | Declined | Withdrawn/Cancelled | Mark Status as Complete

Add Products to Transaction Certificate

*Please select the products that you want to add to this certificate

- Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton
- Babies' apparel | PC0003 - Pants, trousers | PD0003 - 100% Recycled post-consumer Alpaca
- Unisex apparel | PC0005 - Suits, suit- pants | PD0002 - 50% Organic Bamboo, 50% Recycled post-consumer Feather

Download Certificate

RELATED | CHATTER

Business Partner Relations (2)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
Alfredo Buyer	No		Buyer
Alfredo Consignee	No		Consignee

Certificate Standards (2)

Certificate Standard N...	Reference Standard	Standard Version	Certified Weight (kg)
CS-0202	RCS	2.0	103.00
CS-0203	OCS	3.0	135.00

Within the **Shipping Details** you will find the certified weight for the certificate, this value only becomes available once the products have been approved.

Certified Company
Alfredo Global Client 2 ✓

Contact
Contact 1 Alfredo Global Client 2 ✓

Related scope certificate ①
C-0000767 ✓

Organic Material USDA NOP Compliance ① ✓

Farm trans cert no of First Raw Material ① ✓

Status Comments

Reference Standards
OCS,RCS

Number of Unique Shipments
1

Sub-Status

Audit Activity

Business Partners

Last processor of certified product(s) ① ✓

All Products Ship to Same Consignee? ✓

Name of Consignee ✓

Purchased by non-certified trader?
No ✓

Non certified trader ① ✓

Declarations by Seller of Certified Prod ✓

Additional Declarations by Seller If Any ✓

Shipping Details

Country of Dispatch ✓

Gross shipping weight (kg) ①
283.00

Net shipping weight (kg) ①
273.00

Certified weight (kg) ①
238.00

System Information

Created By
Contact 1 Alfredo Global Client 2,
19/04/2023 09:48

Certificate Number
ITS-RCS-OCS-C-0000785

Certificate Name
C-0000785

Reference no. of the input material TC ① ✓

Owner
Contact 1 Alfredo Global Client 2 ✓

Certificate Issue Date

Farm scope cert no of First Raw Material ① ✓

Trader(s) Trans Cert no of 1st Raw Mater ① ✓

Total Certificate Product Number
2

Buyer of Cert Prod -Main site ① ✓

Are you selling on behalf of someone
No ✓

Seller of Certified Products ✓

Are you buying on behalf of someone
No ✓

Buyer of Cert Prod -other than Main site ① ✓

Country of Destination ✓

Earliest Invoice Date
19/04/2023

Last Modified By
Contact 1 Alfredo Global Client 2,
25/04/2023 12:15

RELATED **CHATTER**

Business Partner Relations (2)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
Alfredo Buyer	No		Buyer
Alfredo Consignee	No		Consignee

[View All](#)

Certificate Standards (2) New

Certificate Standard N...	Reference Standard	Standard Version	Certified Weight (Kg)
CS-0202	RCS	2.0	103.00
CS-0203	OCS	3.0	135.00

[View All](#)

Certificate Products (2)

Certificate Product Na...	Product Description SC	Material Composition TC	Product Status
P-8657	Babies' apparel PC000...	100% Recycled post-co...	Approved
P-8656	Men's apparel PC0001...	100% Organic Cotton	Approved

[View All](#)

Connection Request Certificates (0)

Files (0) Add Files

[Upload Files](#)

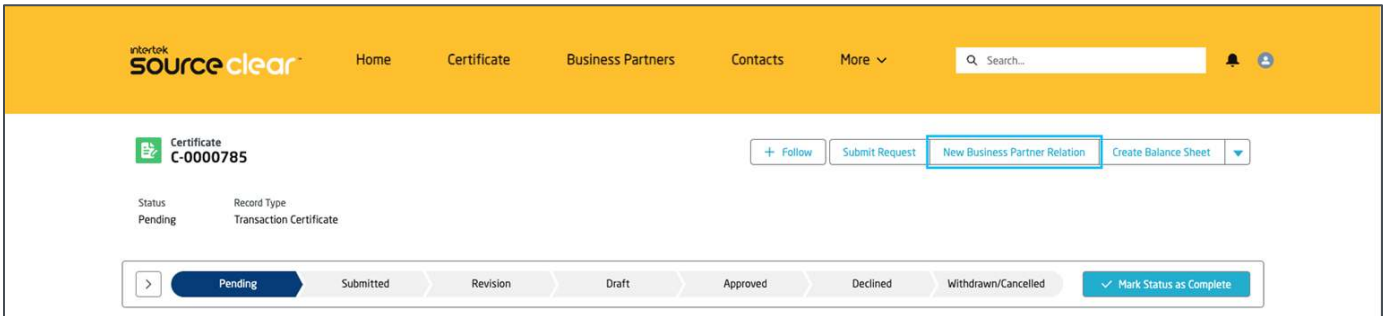
Or drop files

Certificate History (1)

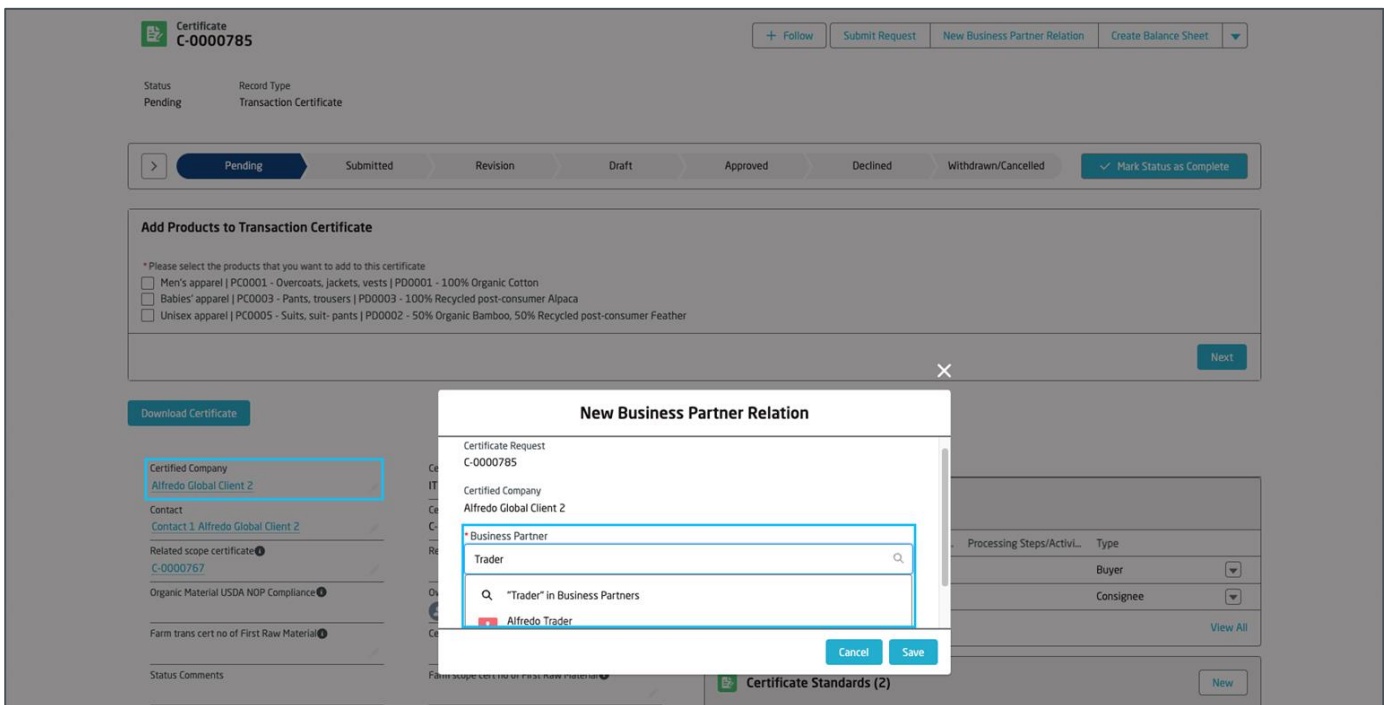
Date	Field	User	Original Value	New Value
19/04/2023 09:...	Created.	Contact 1 Alfredo ...		

[View All](#)

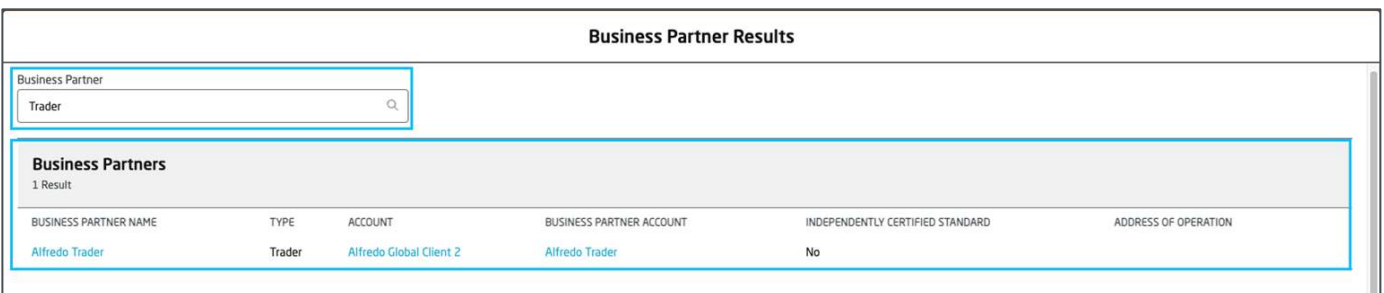
At the top of the certificate page you will find the **New Business Partner Relation** button, click on it to add a new business partner relation to the certificate.



Search for the business partner that you want to add to the certificate, now the system only allows you to select business partners related to the **Certified Company** of the certificate.



Use the search option to see more details of the business partner you are about to relate to the certificate.



Once you are sure which business partner to add to the certificate click on **Save** button.

New Business Partner Relation

Certificate Request
C-0000785

Certified Company
Alfredo Global Client 2

* Business Partner

Alfredo Trader ✕

Cancel
Save

The new business partner relation record will appear under the **Business Partner Relations** section

intertek sourceclear
Home
Certificate
Business Partners
Contacts
More ▾

Q Search...

Certificate
C-0000785

+ Follow
Submit Request
New Business Partner Relation
Create Balance Sheet ▾

Status: Pending Record Type: Transaction Certificate

>

Pending
Submitted
Revision
Draft
Approved
Declined
Withdrawn/Cancelled

✓ Mark Status as Complete

Add Products to Transaction Certificate

* Please select the products that you want to add to this certificate

Men's apparel | PC0001 - Overcoats, jackets, vests | PD0001 - 100% Organic Cotton
 Babies' apparel | PC0003 - Pants, trousers | PD0003 - 100% Recycled post-consumer Alpaca
 Unisex apparel | PC0005 - Suits, suit- pants | PD0002 - 50% Organic Bamboo, 50% Recycled post-consumer Feather

Next

Download Certificate

<p style="font-size: 0.7em; margin: 0;">Certified Company Alfredo Global Client 2</p> <p style="font-size: 0.7em; margin: 0;">Contact Contact 1 Alfredo Global Client 2</p> <p style="font-size: 0.7em; margin: 0;">Related scope certificate C-0000767</p> <p style="font-size: 0.7em; margin: 0;">Organic Material USDA NOP Compliance</p> <p style="font-size: 0.7em; margin: 0;">Farm trans cert no of First Raw Material</p> <p style="font-size: 0.7em; margin: 0;">Status Comments</p>	<p style="font-size: 0.7em; margin: 0;">Certificate Number ITS-RCS-OCS-C-0000785</p> <p style="font-size: 0.7em; margin: 0;">Certificate Name C-0000785</p> <p style="font-size: 0.7em; margin: 0;">Reference no. of the input material TC</p> <p style="font-size: 0.7em; margin: 0;">Owner Contact 1 Alfredo Global Client 2</p> <p style="font-size: 0.7em; margin: 0;">Certificate Issue Date</p> <p style="font-size: 0.7em; margin: 0;">Farm scope cert no of First Raw Material</p>
---	--

RELATED
CHATTER

Business Partner Relations (3)

Business Partner Name	Independently Certified...	Processing Steps/Activi...	Type
Alfredo Buyer	No		Buyer ▾
Alfredo Consignee	No		Consignee ▾
Alfredo Trader	No		Trader ▾

[View All](#)

You will also be prevented from attempting to relate business partners with types that don't apply for the transaction certificate, in this case we are attempting to relate a facility and the system is showing this error message.

New Business Partner Relation

Review the errors on this page.

Business Partner Type should be Buyer, Consignee, Trader or Seller

Certificate Request

C-0000785

Certified Company

Alfredo Global Client 2

* Business Partner



Brand 1 Global Client 2



Cancel

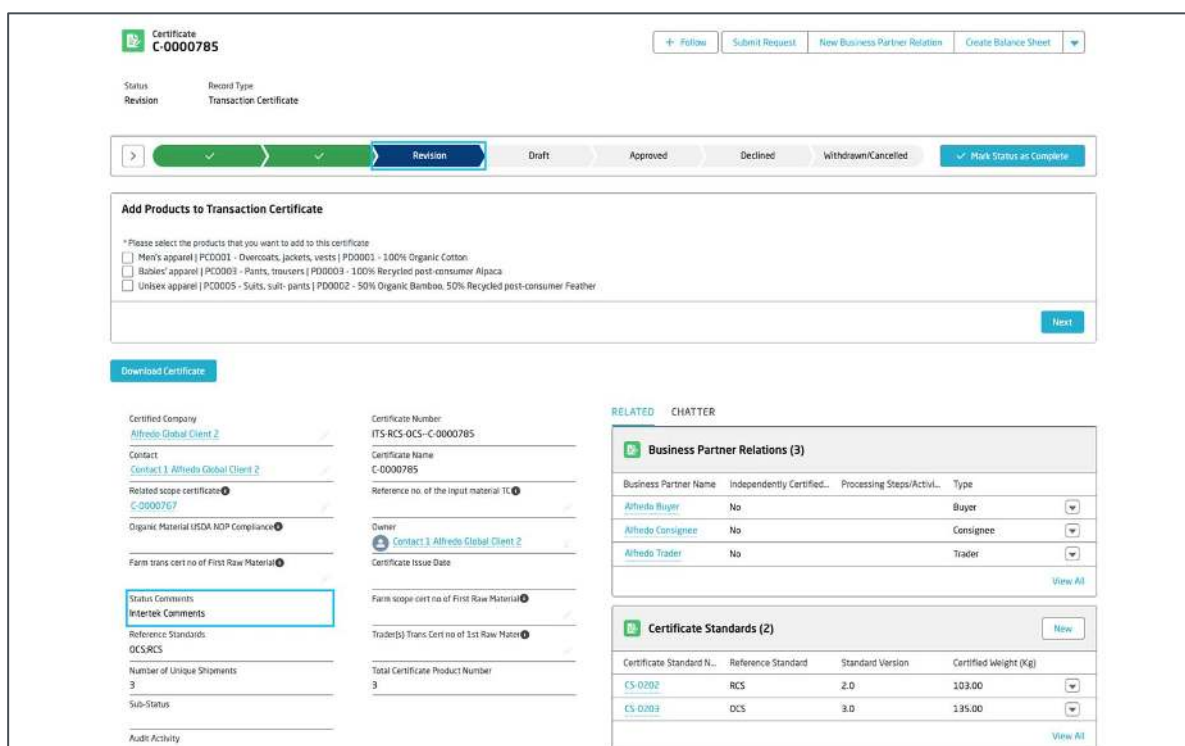
Save

Guidance: the following business partner types are allowed to be related to a transaction certificate

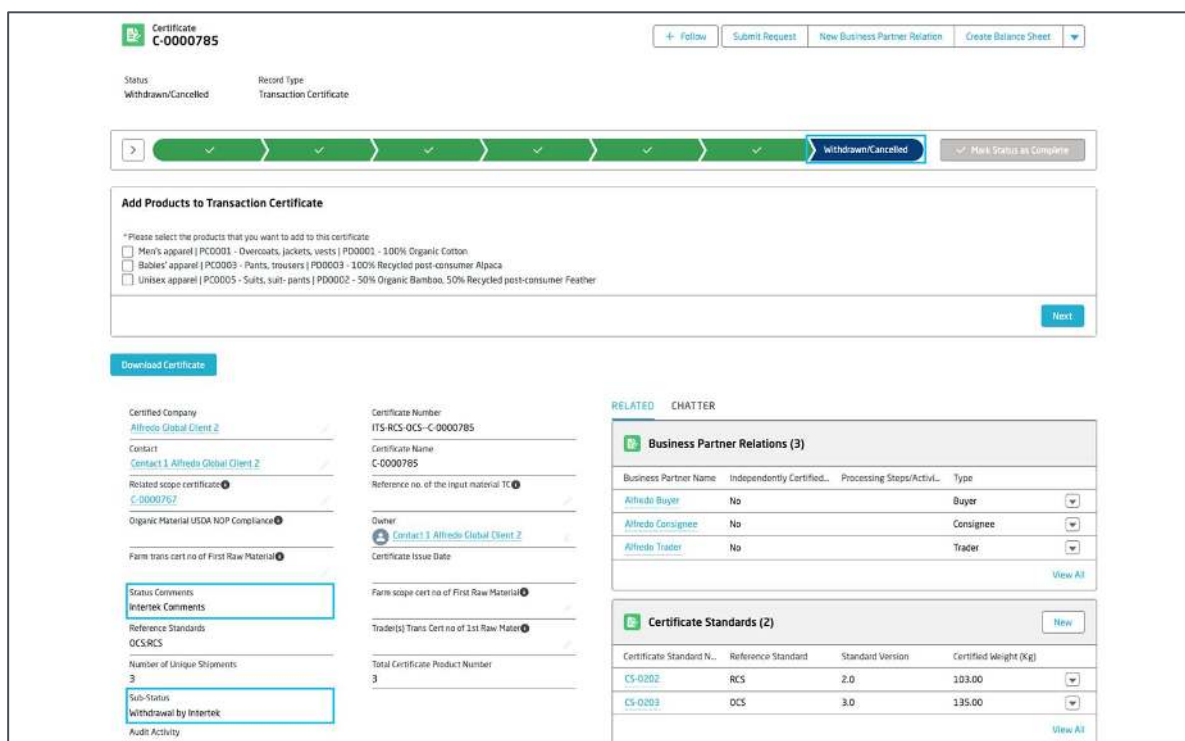
- Buyer
- Consignee
- Trader
- Seller

Two new fields have been added to the transaction certificate: **Status Comments** and **Substatus**.

Status Comments will be entered by Intertek employees when they want to communicate any particular update on why the certificate is in a certain status. For example, if the certificate is set to **Revision** status by the Customer Service Team then they will provide feedback in that field.



Substatus will be used by Intertek employees for the status **Withdrawn/Cancelled**. It will state if it was Intertek's decision or customer's decision to cancel the transaction certificate. Additionally, the **Status Comments** will indicate a more detailed explanation.



You will find a section named **CHATTER** within the transaction certificate, click on it and you will be presented with the most recent activity for the record, for example the changes in the status of the certificate.

The screenshot displays the 'Certificate C-0000785' page. At the top right, there are buttons for '+ Follow', 'Submit Request', 'New Business Partner Relation', and 'Create Balance Sheet'. Below this, the status is 'Pending' and the record type is 'Transaction Certificate'. A progress bar shows stages: Pending (active), Submitted, Revision, Draft, Approved, Declined, and Withdrawn/Cancelled. A 'Mark Status as Complete' button is also present.

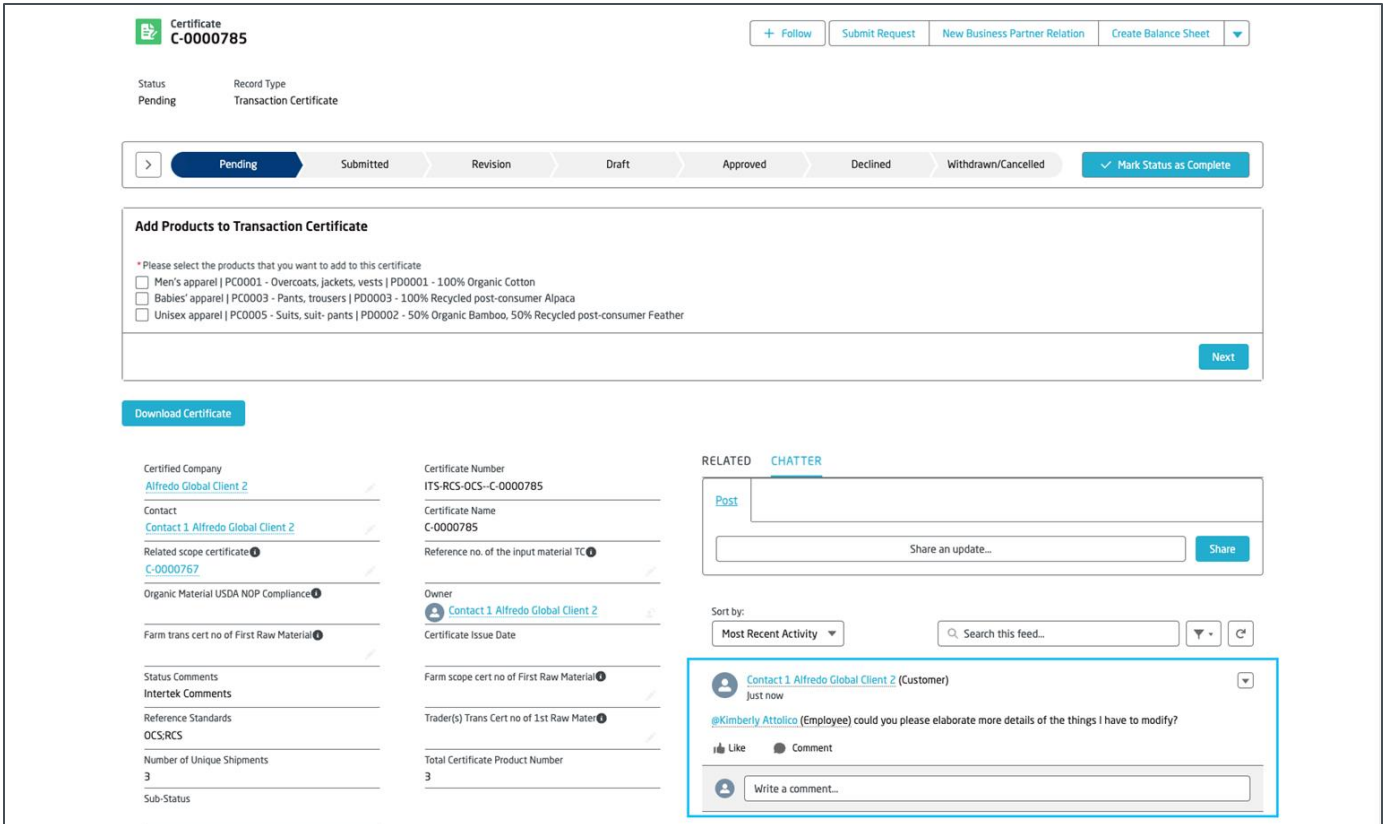
The 'Add Products to Transaction Certificate' section contains a list of product categories with checkboxes: Men's apparel, Babies' apparel, and Unisex apparel, each with specific material details.

The 'Download Certificate' button is visible. The 'RELATED CHATTER' section is highlighted with a blue box. It shows a post with the text: 'This record was updated. 26m ago. Status: Withdrawn/Cancelled to Pending. Status: Pending to Withdrawn/Cancelled.' Below the post is a 'Show All Updates' link.

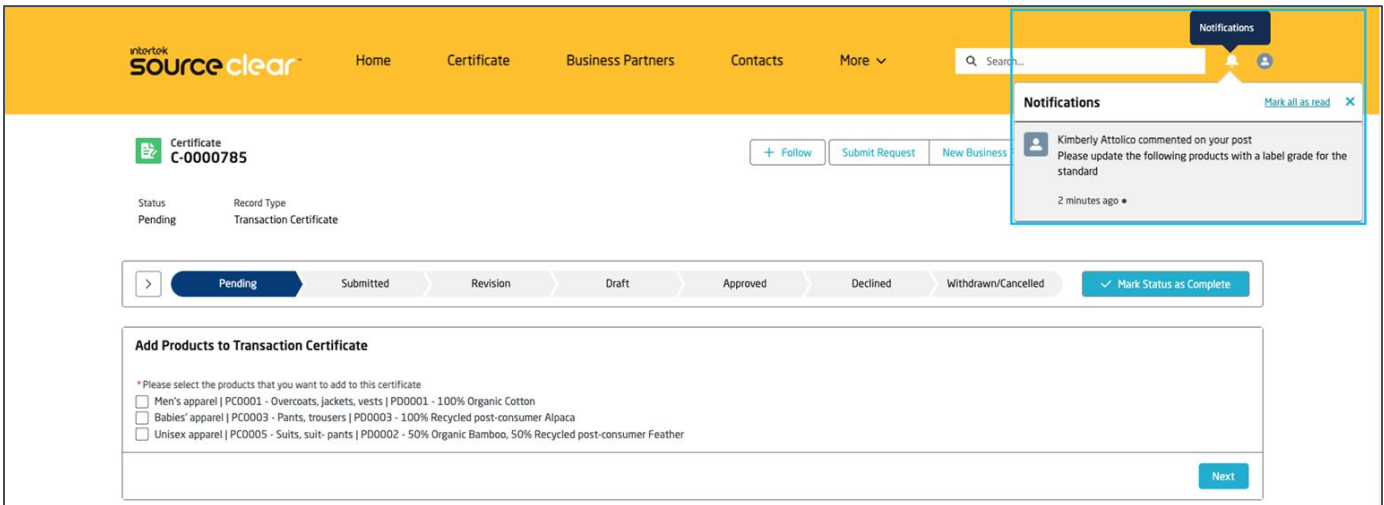
You can also add comments to the feed and direct them towards an Intertek employee (a Customer Service Representative or Technical Reviewer). To do so tag the user by typing '@' and then add the name of the person, you will be presented with the list of users that match that name.

This screenshot is similar to the previous one but shows the 'CHATTER' section with a post being composed. The post text is '@kimberly'. A dropdown menu is open, showing a search for 'kimberly' and a result for 'Kimberly Attolico (Employee)'. The post is addressed to 'To: C-0000785' and has a 'Share' button.

Finish editing your comment and click on the button **Share**, the tagged user will receive a notification with your comment. The comment will be added into the feed as it shows in the following image.

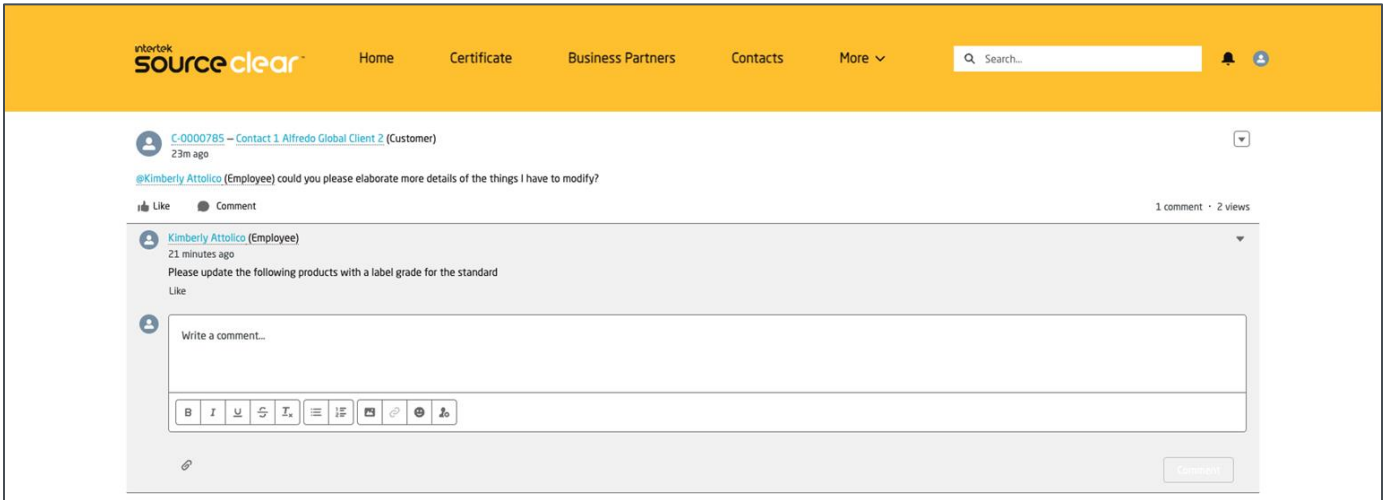


When the Intertek employee replies to your comment or tags you in another comment, you will receive a bell notification in the Source Clear Portal to let you know of this new update.

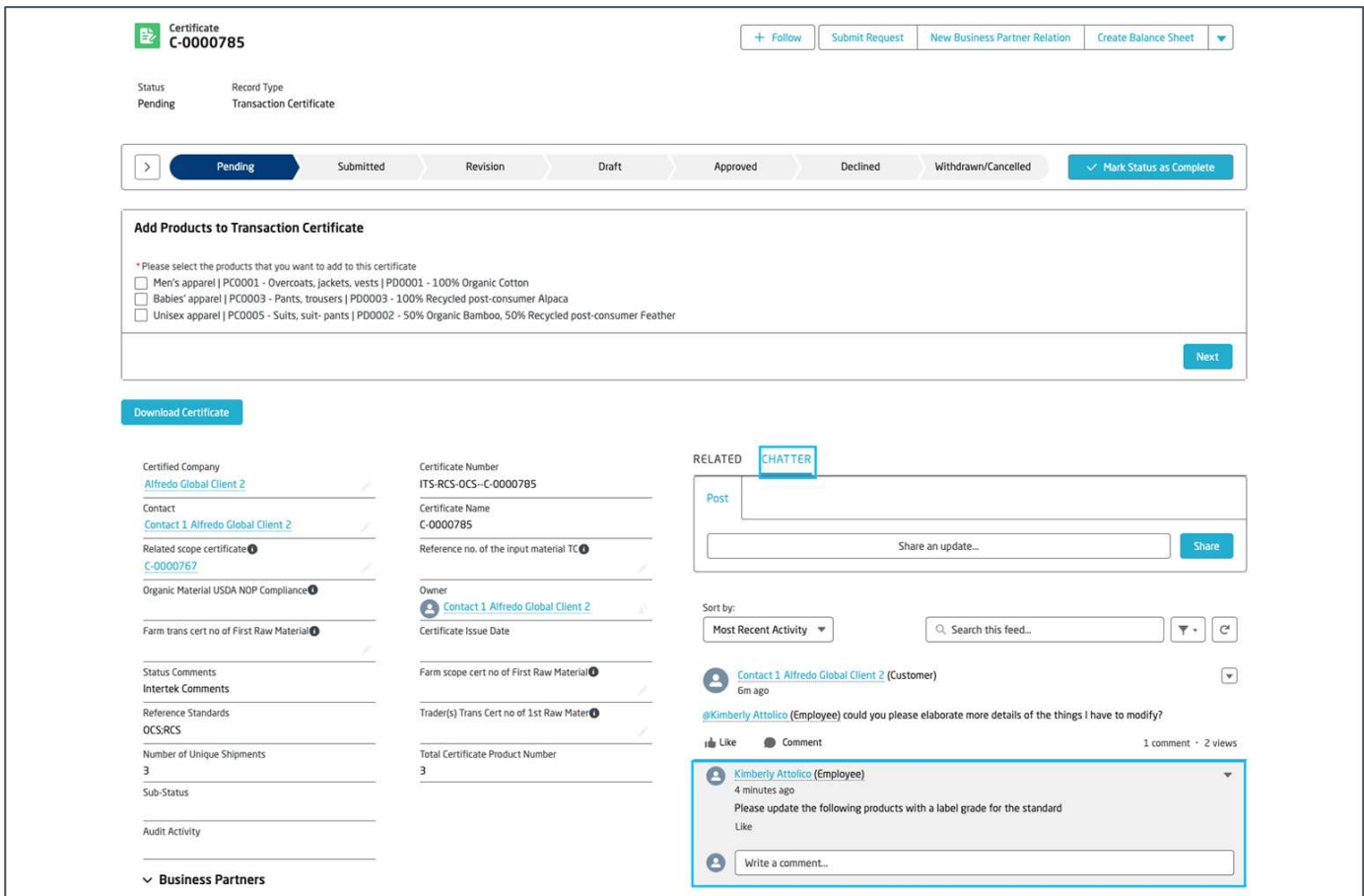


Guidance: you will also receive a notification in your email box.

You can click on the notification and it will navigate you to the comment posted by the Intertek employee.



You can also navigate back to the certificate, under the **CHATTER** section you will see the comment posted by the Intertek employee.



Guidance: for any new interaction within the thread you will receive a notification. If any users adds a new comment without tagging any other user then no notification is sent.

To ensure transaction certificates are created within a specified period(s), we've created a number of validations to ensure these period(s) are adhered to. These are as follows

- Transaction certificate creation - 30 Days following Scope certificate expiration..This can be extended upon request but will be approved for exceptions only.
- Transaction certificate creation - 15 Days following Scope certificate expiration where the Certificate Standards contain GOTS

Error Message

The screenshot shows the 'New Certificate: Transaction Certificate' form. The form is titled 'New Certificate: Transaction Certificate' and includes a legend '* = Required Information'. The form is divided into several sections: 'Information', 'Contact', 'Documentation Checked', 'Organic Material USDA NOP Compliance', 'Farm scope cert', and 'Farm trans cert n'. The 'Information' section includes fields for 'Certified Company' (Kayleigh Test), 'Certificate Name', 'Technical Reviewer', 'Reference no. of the input material TC', and 'Owner' (Kayleigh Izzard). The 'Documentation Checked' section has a dropdown menu set to '--None--'. The 'Organic Material USDA NOP Compliance' section has a dropdown menu set to '--None--'. The 'Farm scope cert' section has a dropdown menu set to 'Pending'. The 'Farm trans cert n' section has a dropdown menu set to 'None'. A red error message box is overlaid on the form, stating 'We hit a snag.' and 'Review the errors on this page.' with a list of errors: 'You cannot create a transaction certificate against this related scope certificate as it expired by more than the applicable window.' The form also includes 'Cancel', 'Save & New', and 'Save' buttons.

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SOURCE clear™

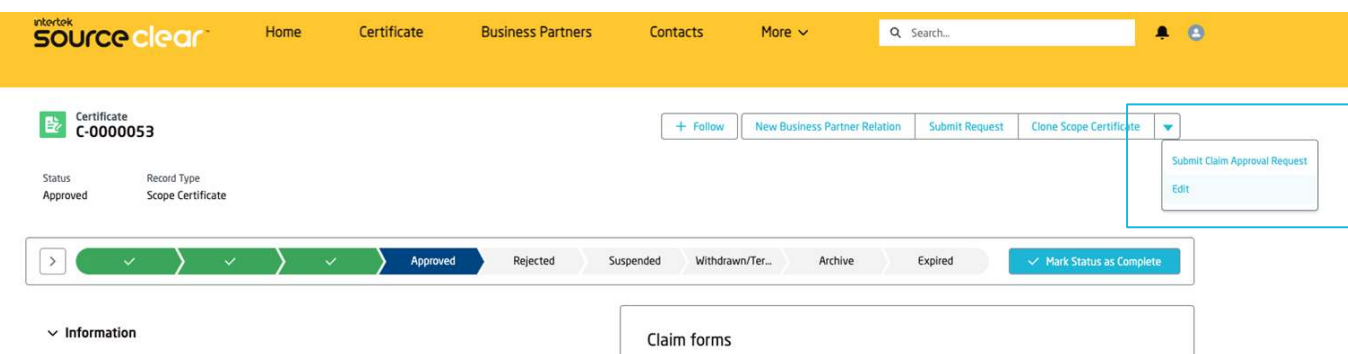
Claim Approval Request

Topics	Page Number
<ol style="list-style-type: none">1. Submitting Claim Approvals2. Uploading files3. Chatter Interactions<ol style="list-style-type: none">a. Taggingb. Notifications4. Notifications and Emails	

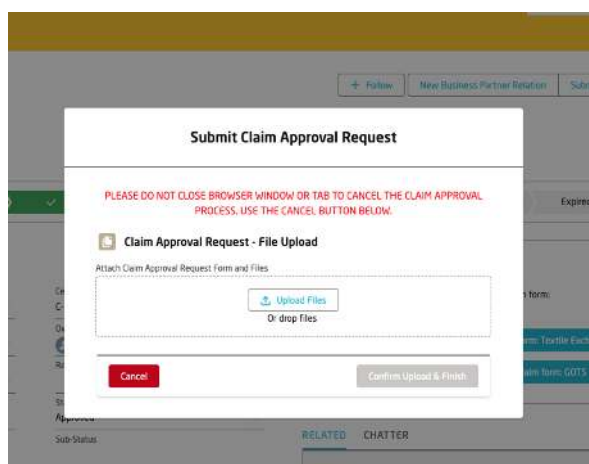
Guidance:

This process exists for when you need to submit a logo for approval. This is referred to as a Claim Approval Request in Source Clear.

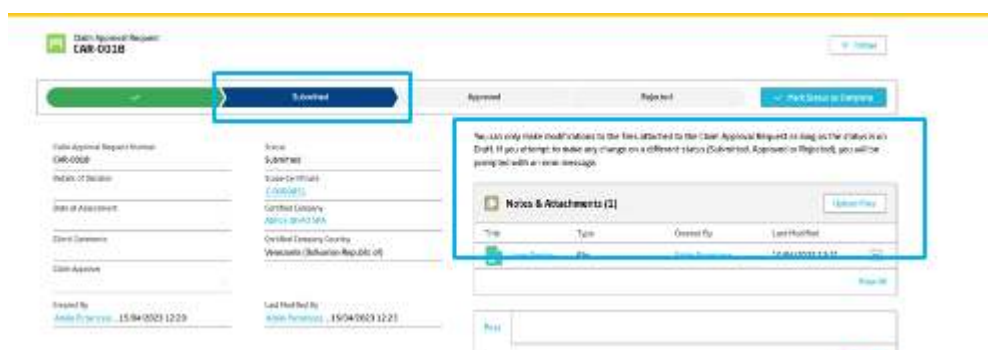
Navigate to an existing approved Scope Certificate in Source Clear. Using the drop down box on the far right of the page, select 'Submit Claim Approval Request'



When you click this button you will be prompted to upload an image for your logo for the Claim Approval Request process.



Check that the image has uploaded correctly viewing the related list on the right of the page and that the status of the record has changed to Submitted



You will receive an update via email when a claim has been reviewed. If a claim is rejected you will be given the reasons why and details of next steps

Global Clients

Topics	Page Number
<ol style="list-style-type: none">1. Supply Chain Accounts on Source Clear Portal2. Connection Request Creation3. Terms & Conditions4. Connection Request Accept, Decline and Inactive5. Data Visibility – Share Certificates Information	

Supply Chain Accounts Visibility on the Portal - Guidance: Customer Users marked with the Role "Supply Chain Contact" under their Account are able to send a Connection Request to other Clients in the Source Clear Portal.

Clients Visibility on the Source Clear Portal:

The Customer User can search in the Source Clear Portal the Account they would like to connect with in the Account tab.

Account Name	Type	Billing Street	Billing Cl...	Billing State/Pro...	Billing Country	Created Date	Dwin...	Owner La...	Account ...	Lice
1 ABC Corp	Client/Buyer	100 Mulberry Street	Newark	New Jersey	United States of America	22/02/2023 18:43	Samantha	Ulysse	SCTC Accou...	12:
2 Brand test		road 123	shanghai	Shanghai	China	17/11/2023 07:47	Jerry	Shi CS	SCTC Accou...	
3 BRAND TEST 2		shanghai road 11	shanghai	Shanghai	China	20/11/2023 07:03	Jerry	Shi CS	SCTC Accou...	
4 Company A	Brand	408 Locust Ave	Garwood	New Jersey	United States of America	10/05/2022 12:32	Kimberly	Hildebrandt CS	SCTC Accou...	LC:
5 EMMA BRAND 1	Brand	XXXX	XXX	Ankara	Turkey	20/04/2023 08:18	Emma	Yook CS Rep	SCTC Accou...	
6 EMMA GLOBAL CLIENT	Global Client	DD	DD	Palmyra Atoll	United States Minor Outly...	19/04/2023 08:29	Emma	Yook CS Rep	SCTC Accou...	
7 Emma's supply Chain A	Global Client	ABC	DEF	Oregon	United States of America	09/11/2023 02:23	Emma	Yook CS Rep	SCTC Accou...	12:
8 Emma's supply Chain B	Global Client	ABC	DEF	Busan Gwang'yeogsi	Korea (Republic of)	09/11/2023 02:27	Emma	Yook CS Rep	SCTC Accou...	12:
9 Qingdao Wenjie: test	Supplier	Jiaozhou	Qingdao	Shandong	China	08/11/2023 08:57	Tyrlon	Zhang CS	SCTC Accou...	Q1:
10 Shanghai Wefast Textile Co., Lt...		1/F, No.36B, Huichuang International ...	Shanghai CL	Jiangxi	China	30/10/2023 11:38	Anas	Ibrahim	SCTC Accou...	S6:
11 Suzhou Fast Textile Technolog...		8-102 (Shengze Plaza International Bu...	Suzhou	Jiangsu	China	12/05/2023 01:40	Peter	Zhu CS	SCTC Accou...	12:
12 Test SCTC Account	Supplier	Yukon-Koyukuk Census Area	test	Alaska	United States of America	08/06/2022 12:25	Varsha	Rathod Admin	SCTC Accou...	
13 Testing.1		100 Mulberry Street	Newark	New Jersey	United States of America	06/09/2022 03:41	Samantha	Ulysse CS	SCTC Accou...	98:
14 UAT Test 1		5 Times Square	New York	New York	United States of America	13/01/2023 01:19	Samantha	Ulysse CS	SCTC Accou...	ABI

Click on the Account Name to open the Account record.

Account
Suzhou Fast Textile Technology Co., Ltd.

Status: Billing Address: 8-102 (Shengze Plaza International Building), No.88, Shunhu West Road, Shengze Town, Wujiang District, Suzhou, Jiangsu, 215220, China. Account Owner: Peter Zhu CS

Account Name: Suzhou Fast Textile Technology Co., Ltd.
Chinese Name: [redacted]
License Number: 123654
VAT Number: [redacted]
CMPY: [redacted]
Phone: [redacted]
CM Code: [redacted]
Type: [redacted]

Address Information:
Billing Address: 8-102 (Shengze Plaza International Building), No.88, Shunhu West...
Chinese Address: [redacted]

RELATED: CERTIFICATES (0), CONNECTION REQUESTS RECEIVED (0), CONNECTION REQUESTS REQUESTED (1)

Connection ...	Receiver Acc...	Status	Start Date
CR-0056	Test SCTC Ac...	Inactive	22/11/2023

Supply Chain Accounts - Guidance: External Customer Users that are not linked to the accessed Account, can only see limited information (no Certificates, Business Partners, Related Contacts, etc. available) before they get an approved connection with the specific Client.

Connection Request:

In the Account record page, you can now see a new button called "New Connection Request".

The screenshot shows the account record page for Suzhou Fast Textile Technology Co., Ltd. The account name is highlighted. In the top right corner, there is a button labeled "New Connection Request" which is circled in orange. Below the account name, there are fields for Billing Address, Account Owner (Peter Zhu CS), Account Name, Chinese Name, License Number (123654), VAT Number, and CMPY. On the right side, there are sections for "RELATED" and "CHATTER", with "Certificates (0)" and "Connection Requests Received (0)" listed.

Connection Request Creation - Guidance: The system populates by default the information of the Requester and the Receiver Clients in the new Connection Request form.

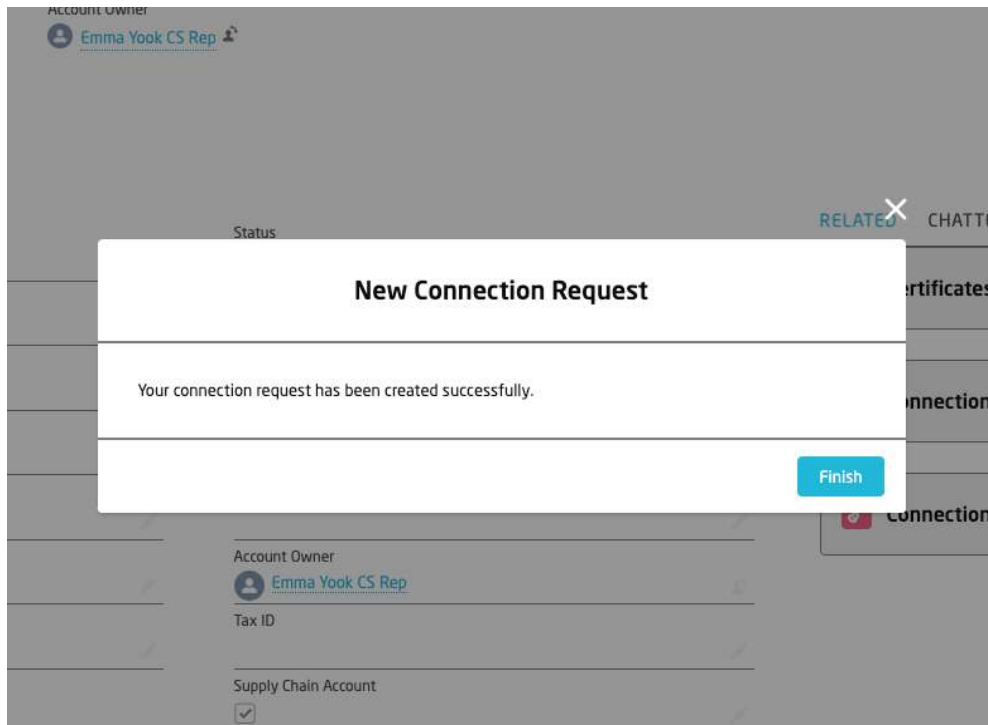
Click on the New Connection Request button. Review the Details and click Next.

The screenshot shows the "New Connection Request" form. The form has a title "New Connection Request" and a close button (X) in the top right corner. Below the title, there are two columns: "Requester" and "Receiver". The "Requester" field contains "Test SCTC Account" and the "Receiver" field contains "Suzhou Fast Textile Technology Co., Ltd.". At the bottom right of the form, there is a blue "Next" button.

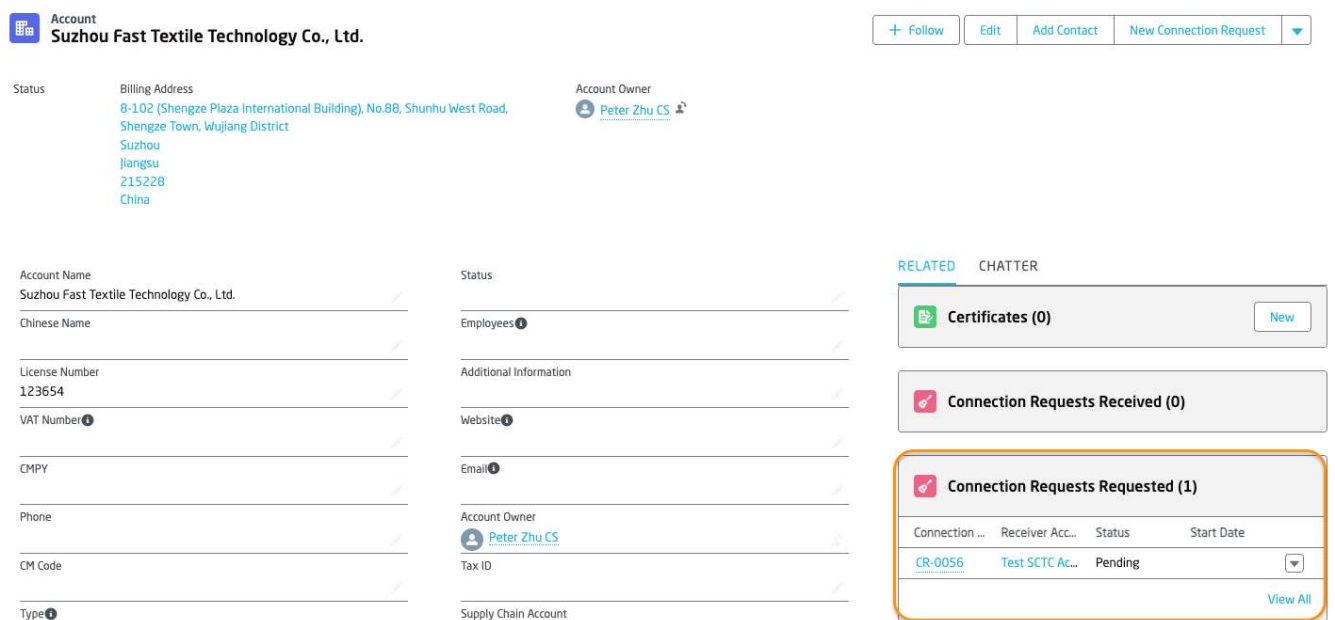
Connection Request Receiver - Guidance: The Receiver is the Account that is going to receive the Connection Request.

Connection Request Requester - Guidance: The Requester is the User's Account that has clicked on the "New Connection Request" button.

Once clicked on "Next", a success message is displayed.

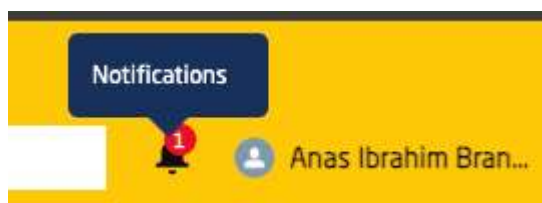


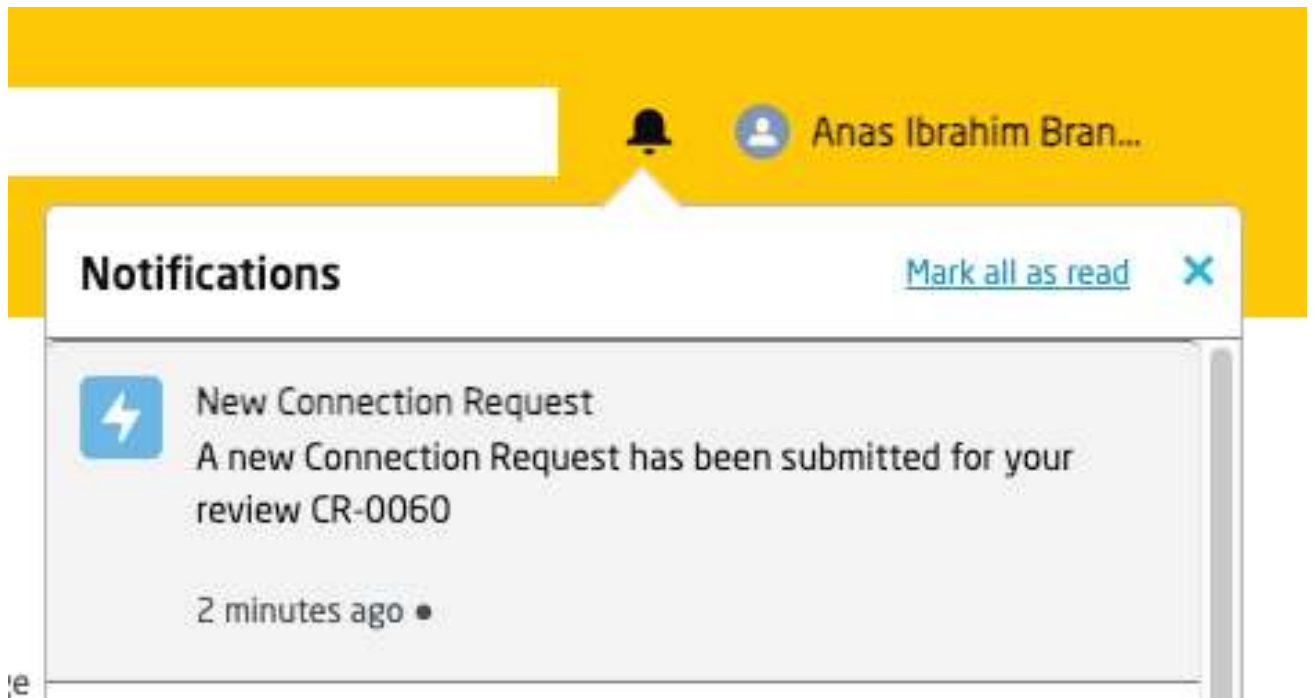
The Connection Request created can be verified in the Account's Page under the related list of "Connection Requests Received".



Connection Request Created - Guidance: Connection requests are created in Pending status.

The Supply Chain Contacts from the Receiver Account will receive an on-app notification and email notification.





Receiver Account's Users will see in the bell icon the notification that was sent by the Requester Account.

Click on the Connection Request bell notification to open the Connection Request record

Connection Request
CR-0060

Home Certificate Business Partners TC Input Contacts More

Q Anas Ibrahim Bran...

Pending Accepted Declined Inactive Mark Status as Complete

Connection Request Name
CR-0060

Requester Account
Test SCTC Account

Receiver Account
Suzhou Fast Textile Technology Co., Ltd.

I agree to terms and condition

Account Name
Test SCTC Account

Created By
Andrei Budescu , 23/11/2023 11:21

Status
Pending

Start Date

End Date

Last Modified By
Andrei Budescu , 23/11/2023 11:21

T&C RELATED

Intertek Source Clear Platform Terms and Conditions (T&C)

Welcome to the Intertek Source Clear Platform, which is made available subject to the following terms and conditions, which from time to time may be changed by Intertek without notice ("T&C"). You, as the Client, or an employee or agent of the Client, are responsible for ensuring your knowledge of, and compliance with the T&C. The T&C are and shall be construed as a contract between You and Intertek subject to specific terms to be further agreed to between you and Intertek, if any, in the event of your use of any particular type of online solution provided by Intertek based on or in association with the Source Clear Platform. Delivery of the T&C to You is presumed to occur at the time You submit any application for access the Source Clear Platform, and again whenever You affirmatively submit any acknowledgement approving and agreeing to the terms and conditions of the T&C (including a "click" on any "I Agree" button, or its equivalent). You acknowledge receipt of the T&C upon and at each such time and acknowledge that use of the Source Clear Platform and any other specific

Connection Request Record Page - Guidance:

On the record page you can see the details of the Connection Request, the Terms and Conditions the Receiver Account needs to accept, and the related list of Certificates shared between the Accounts.

Connection Request Terms & Conditions - Guidance:

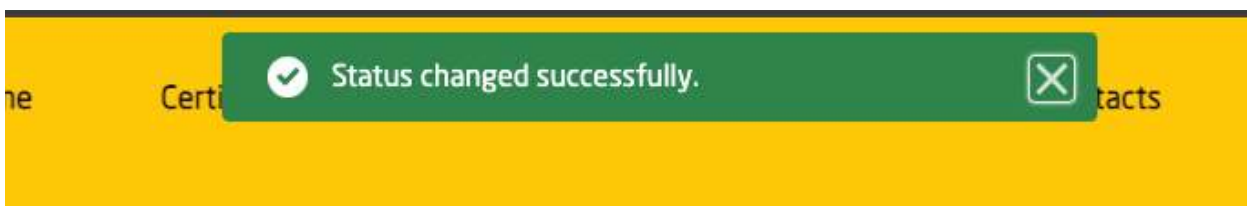
Receiver Account has the ability to Accept or Decline a Connection Request received. When the Connection Request is accepted the terms and conditions must be accepted due to confidential information is being shared to the Requester Account.

Accepting a Connection Request

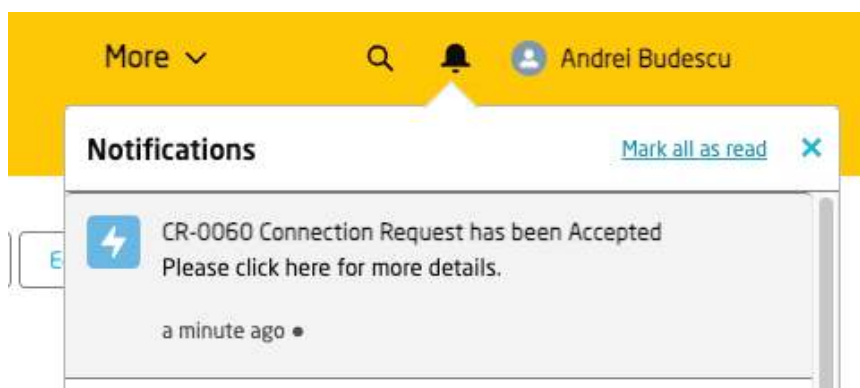
Click on the Accepted value of the Path then mark the box I agree to terms and conditions and click on the Mark as Current Status button.

The screenshot shows the 'Connection Request' interface for CR-0060. At the top, there are 'Edit' and 'Share Certificates' buttons. Below is a navigation path with four stages: 'Pending', 'Accepted', 'Declined', and 'Inactive'. The 'Accepted' stage is highlighted with a blue arrow. To the right of the path is a 'Mark as Current Status' button. Below the path is a 'Key Fields' section with a checkbox labeled 'I agree to terms and condition'. The main content area is divided into two columns. The left column contains details: Connection Request Name (CR-0060), Requester Account (Test SCTC Account), Receiver Account (Suzhou Fast Textile Technology Co., Ltd.), I agree to terms and condition (checkbox), Account Name (Test SCTC Account), and Created By (Andrei Budescu, 23/11/2023 11:21). The right column contains: Status (Pending), Start Date, End Date, and Last Modified By (Andrei Budescu, 23/11/2023 11:21). On the far right, there is a 'T&C RELATED' tab with a sub-tab 'Intertek Source Clear Platform Terms and Conditions (T&C)'. The T&C text reads: 'Welcome to the Intertek Source Clear Platform, which is made available subject to the following terms and conditions, which from time to time may be changed by Intertek without notice ("T&C"). You, as the Client, or an employee or agent of the Client, are responsible for ensuring your knowledge of, and compliance with the T&C. The T&C are and shall be construed as a contract between You and Intertek subject to specific terms to be further agreed to between you and Intertek, if any, in the event of your use of any particular type of online solution provided by Intertek based on or in association with the Source Clear Platform. Delivery of the T&C to You is presumed to occur at the time You submit any application for access the the Source Clear Platform, and again whenever You affirmatively submit any acknowledgement approving and agreeing to the terms and conditions of the T&C (including a "click" on any "I Agree" button, or its equivalent). You acknowledge receipt of the T&C upon and at each such time and acknowledge that use of the Source Clear Platform and any other specific solution provided by or via Intertek confirms the creation and existence of a contract between You and Intertek.'

The Terms & Conditions can be found on the record page layout under the T&C Tab on the right-hand side of the screen.



Connection Request Accepted / Declined - Guidance: After the Connection request is Accepted/Declined the system will inform the Request Account through the bell notification icon and via email.



To open the notification the Requester Account should click on the bell icon then click on the notification itself.

The screenshot shows the 'Connection Request' page for CR-0060. The status is 'Accepted', highlighted with a blue bar and a checkmark. The 'Start Date' is 23/11/2023, also highlighted with a blue box. The page includes details for the Requester Account (Test SCTC Account), Receiver Account (Suzhou Fast Textile Technology Co., Ltd.), and the user who created it (Andrei Budescu). A 'T&C RELATED' section contains the Intertek Source Clear Platform Terms and Conditions.

Inactive a Connection Request

Inactive Connection Request - Guidance: Any of the parties involved in a connection request can concluded the relationship changing it to Inactive status.

Click on the Connection Request tab and open the Connection Request which is going to be terminated.

The screenshot shows the 'Connection Requests' list page. The 'Connection Request' tab is selected and highlighted with a blue box. The list contains two items: CR-0059 (Pending) and CR-0060 (Accepted). The 'Connection Request' tab is highlighted with a blue box.

Click on Connection Request Name to open the record.

This screenshot is identical to the first one, showing the 'Connection Request' page for CR-0060 in the 'Accepted' status. The 'Start Date' is 23/11/2023. The page includes details for the Requester Account (Test SCTC Account), Receiver Account (Suzhou Fast Textile Technology Co., Ltd.), and the user who created it (Andrei Budescu). A 'T&C RELATED' section contains the Intertek Source Clear Platform Terms and Conditions.

Click on **Inactive** option of the Kanban then click on **Mark as Current Status** button.

The screenshot displays the Source Clear web application interface. At the top, a yellow navigation bar contains the 'intertek source clear' logo on the left and navigation links for 'Home', 'Certificate', 'Business Partners', 'TC Input', 'Contacts', and 'More'. On the right side of the navigation bar are search, notification, and user profile icons for 'Andrei Budescu'. Below the navigation bar, the main content area shows a 'Connection Request CR-0060' card. The card has a status bar with three stages: 'Accepted' (green), 'Declined' (grey), and 'Inactive' (dark blue). The 'Inactive' stage is currently selected and highlighted with an orange border. To the right of the 'Inactive' stage is a light blue button labeled 'Mark as Current Status'. Above the status bar, there are 'Edit' and 'Share Certificates' buttons.

Supply Chain Account Data Visibility - Guidance:

Client Accounts are able to see other Client Accounts in the system if the Account record is marked as "Supply Chain Account".

Visibility of the data is determined by the Connection Request record:

- **Connected Account:** When a Customer User accesses an Account that there is a connection with, this can view the Certificates that are shared with its Account.
- **Other Accounts:** When a Customer User accesses an Account that is not connected with, the related list of Certificates will display 0 records.

Connection established with SCTC Account – Data Visibility

Account: Suzhou Fast Textile Technology Co., Ltd.

Status: Billing Address: 8-102 (Shengze Plaza International Building), No.88, Shunhu West Road, Shengze Town, Wujiang District, Suzhou, Jiangsu, 215228, China. Account Owner: Peter Zhu CS

Account Name: Suzhou Fast Textile Technology Co., Ltd. Chinese Name: License Number: 123654. VAT Number: CMPY: Phone: CM Code: Type: Address Information: Billing Address: 8-102 (Shengze Plaza International Building), No.88, Shunhu West... Chinese Address:

Employees: Additional Information: Website: Email: Account Owner: Peter Zhu CS. Tax ID: Supply Chain Account:

RELATED CHATTER

Certificates (2)

Certificate ...	Status	Record Type	Created Date
C-0002281	Submitted	Scope Certifi...	11/11/2023 ...
C-0000880	Approved	Scope Certifi...	12/05/2023 ...

Connection Requests Received (1)

Connection ...	Requester Ac...	Status	Start Date
CR-0060	Test SCTC Ac...	Accepted	23/11/2023

Connection Requests Requested (0)

Other SCTC Account in the Source Clear Portal where there is no connection established.

Account: EMMA BRAND 1

Status: Billing Address: XXXX XXX, Ankara, XXXXX, Turkey. Account Owner: Emma Yook CS Rep

Account Name: EMMA BRAND 1. Chinese Name: License Number: VAT Number: CMPY: Phone: Address Information: Billing Address: XXXX XXX, Ankara, XXXXX, Turkey. Chinese Address:

Employees: Additional Information: Website: Email: Account Owner: Emma Yook CS Rep. Supply Chain Account:

RELATED CHATTER

Certificates (0)

Connection Requests Received (0)

Connection Requests Requested (0)

Connection Request Certificate - Guidance: Once an active connection request is established between two Client Accounts, each one of them can share a particular Transaction or Scope Certificate with the connected Account.

Open a Connection request record and click on [Share Certificates](#) button.

Connection Request **CR-0060** Edit Share Certificates

> Accepted Declined Inactive Mark Status as Complete

Connection Request Name: CR-0060
Requester Account: [Test SCTC Account](#)
Receiver Account: [Suzhou Fast Textile Technology Co., Ltd.](#)
I agree to terms and condition:
Account Name: Suzhou Fast Textile Technology Co., Ltd.
Created By: [Andrei Budescu](#), 23/11/2023 11:21
Status: Accepted
Start Date: 23/11/2023
End Date:
Last Modified By: [Anas Ibrahim Brand Connections](#), 23/11/2023 11:40

T&C **RELATED**
 Connection Request Certificates (0)

Choose a [Transaction](#) or [Scope Certificate](#) that is going to be shared and click on [Next](#) button.

Share Certificates

Showing 28 of 28 items • 1 item selected

Certificate...	Record Ty...	Reference...	Status	Certificate...
<input type="radio"/> C-0002085	Transaction Certificate	OCS	Pending	
<input type="radio"/> C-0002041	Transaction Certificate	GOTS	Cancelled	02-Jun-2023
<input type="radio"/> C-0000533	Scope Certificate	GOTS;SFA	Archive	10-Jan-2023
<input checked="" type="radio"/> C-0002081	Transaction Certificate	RCS	Approved	12-Jul-2023
<input type="radio"/> C-0000579	Scope Certificate	OCS	Approved	11-Jan-2023
<input type="radio"/> C-0002083	Transaction Certificate	CCS	Pending	
<input type="radio"/> C-0000000	Transaction	CCS	Pending	02-Jun-2023

Next

Start Date: 23/11/2023

Share Certificates

The Certificate has been successfully shared.

Finish

Once the Certificate records has been shared, in the related list of Connection Request Certificates a new record is created. This record highlights what is the Certificate that has been shared between the 2 Accounts.

Connection Request **CR-0060** Edit Share Certificates

Accepted Declined Inactive Mark Status as Complete

Connection Request Name: CR-0060
 Requester Account: [Test SCTC Account](#)
 Receiver Account: [Suzhou Fast Textile Technology Co., Ltd.](#)
 I agree to terms and condition:
 Account Name: Suzhou Fast Textile Technology Co., Ltd.
 Created By: [Andrei Budescu](#), 23/11/2023 11:21
 Status: Accepted
 Start Date: 23/11/2023
 End Date:
 Last Modified By: [Anas Ibrahim Brand Connections](#), 23/11/2023 11:40

T&C RELATED

Connection Request Certificates (1)

Certificate Name	Certificate Issue D...	Certificate Expiry D...
C-0002081	12/07/2023	

[View All](#)

Share Certificates with Connections - Guidance:

Client Users can share a Scope or Transaction Certificate with the connected Accounts directly from the Certificate record page.

Click on the **Certificate** tab and Open a Scope Certificate record.

intertek sourceclear Home **Certificate** Business Partners TC Input Contacts More Andrei Budescu

Certificates **Recently Viewed**

2 Items • Updated a few seconds ago

	Certificate Name	Record Type	Certified Company	Status	Reference Standards	Certificate Issue Date	Certificate Expiry Date
1	C-0000926	Transaction Certificate	Test SCTC Account	Approved	GRS	07/09/2023	
2	C-0000579	Scope Certificate	Test SCTC Account	Approved	OCS	11/01/2023	10/01/2024

Click on the **Triangle** icon.

intertek sourceclear Home Certificate **Certificate** Business Partners TC Input Contacts More Andrei Budescu

Certificate **C-0000579**

Status: Approved Record Type: Scope Certificate

Approved Rejected Suspended Withdrawn/Ter... Archive Expired Mark Status as Complete

Information

Certified Company: [Test SCTC Account](#)
 Contact: [Varsha Rathod](#)
 Project Type: Initial certification
 Reference Standards: OCS
 Certificate Name: C-0000579
 Owner: SCTC CS Rep Queue
 Related scope certificate:
 Status: Approved

Claim forms

Please use the links below to download the claim form:

[RFL ATFD](#) [CHATTER](#)

Click on the [Share Certificates with Connections](#) button.

Connection	Start Date
Suzhou Fast Textile Technology Co., Ltd.	23 Nov 2023

Select the Connected Account which is going to receive access to the Certificate and click on [Next](#) button.

The account(s) have been associated successfully to this certificate.

Click on [Finish](#) button in Share Certificates With Connections confirmation window.

Connection Request CR-0060

Status: Accepted

Start Date: 23/11/2023

End Date:

Receiver Account: Suzhou Fast Textile Technology Co., Ltd.

Created By: Andrei Budescu, 23/11/2023 11:21

Last Modified By: Anas Ibrahim Brand Connections, 23/11/2023 11:40

Certificate Name	Certificate Issue D...	Certificate Expiry D...
C-0002081	12/07/2023	
C-0000579	11/01/2023	10/01/2024

Once the Certificate has been shared, in the related list of [Connection Request Certificates](#) this information will be reflected and the Connected Account will have access to read the information on the Certificate shared.


Remove Shared Certificate Visibility with Connections - Guidance:

Client Users can remove the access to a previously shared Scope or Transaction Certificate with the connected Accounts from the Connection Request record page, by deleting the Connection Request Certificate record.

Click on the Triangle icon in the Connection Request Certificates record that is going to be removed.

T&C **RELATED**

 **Connection Request Certificates (2)**

Certificate Name	Certificate Issue D...	Certificate Expiry D...	
C-0002081	12/07/2023		
C-0000579	11/01/2023	10/01/2024	

[View All](#)

Click on **Delete** button.

T&C **RELATED**

 **Connection Request Certificates (2)**

Certificate Name	Certificate Issue D...	Certificate Ex	
C-0002081	12/07/2023		Edit
C-0000579	11/01/2023	10/01/2024	Delete

[View All](#)

Click on **Delete** button in the confirmation window.

23/11/2023

End Date

Certificate N

Delete Connection Request Certificate

Are you sure you want to delete this Connection Request Certificate?

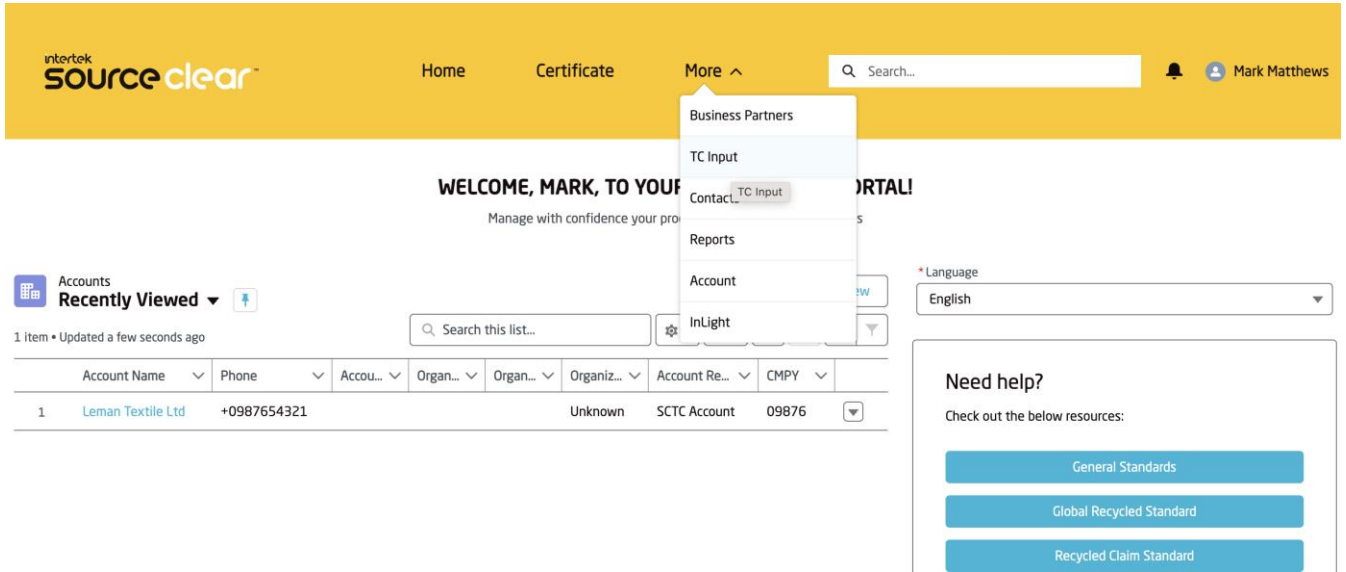
[Cancel](#) [Delete](#)

, 23/11/2023 11:40

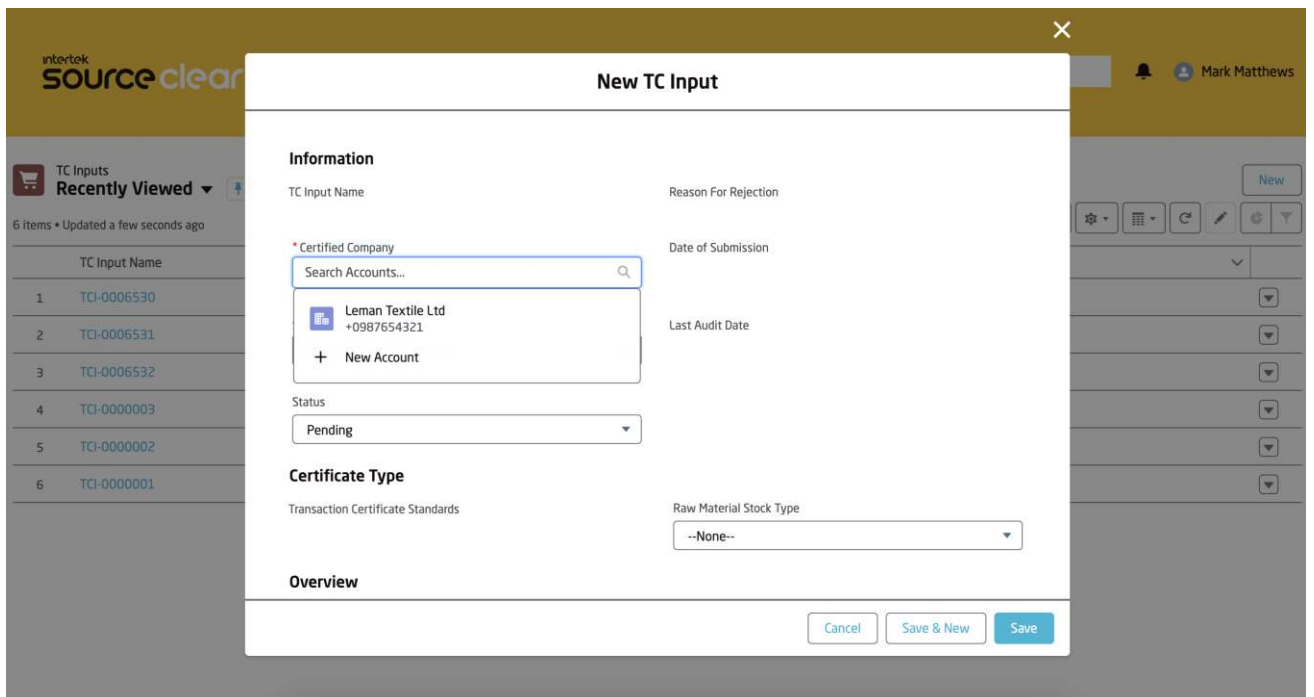
Once the Connection Request has been deleted the connected Account will be not able to see the certificate.

This process outlines the end-to-end guide on how client users create the TC Input records and their associating product, composition and origin records.

Choose [More](#) option on the navigation bar and click [TC Input](#)



Click [New](#) and enter the mandatory details on the TC Input parent record. Follow the validation rules and help texts on the page and click [Save](#)



After the TC Input parent record is created, you will be navigated to the guidance page.

This page contains a Guidance component on the top which outlines the steps needed to be complete in order to submit the TC Input with all the necessary data and files

Step 1: To associate a standard(s) to the TC Input, click **New** to the TC Input Standard object and enter the standard and version required, then click **Save**. The standards created will rollup to the parent TC Input record.

Step 2: Once the standards are created, the next step is to add the relevant products to the TC Input. Click New on the TC Input Product object and add the Category, Details and the Initial Net Weight in your stock.

After you click **save**, the Net Weight value will be copied into the raw material Inventory field. This represents how much **stock** is available to be used in **Balance Sheet calculations**.

TC Input Product TCIP-0018900 [Edit] [Clone] [Printable View]

Product Details

TC Input Product Name: TCIP-0018900

TC Input: [TCI-0006533](#)

Product Description: Women's apparel | PC0002 - Sweaters, pullovers, cardigans | PD0004 -

Stock Information

Purchased Raw Materials Net Weight (kg): 6,000.00

Raw Material Inventory (kg): 6,000.00

Total Certified Weight (kg):

System Information

Created By: [Mark Matthews](#), 05/05/2023 17:08

Last Modified By: [Mark Matthews](#), 05/05/2023 17:08

TC Input Material Composition (0) [New]

TC Input Stock Log (0) [New]

TC Input Product Standards (0)

TC Input Product History (1)

Date	Field	User	Original Value	New Value
05/05/2023 1...	Created.	Mark Matthews		

[View All]

Step 3: On the [related list](#), click New to add a TC Input Material Composition. This record represents the raw material, attribute the standard in which it is certified in

New TC Input Material Composition

Information

TC Input Component Name

* TC Input Product
TCIP-0018900

To remove the selected record, press Backspace or Del.

* Raw Material
--None--

* Attribute Type
[No attribute]

Material Code

Transaction Certificate Standard
--None--

Percentage

Cancel Save & New Save

Note: Only standards which have been associated to the parent Input TC record can be chosen.

Step 4: On the [related list](#) of the TC Material Composition record, please click New and associate a Geographic Origin to the Material Composition. Simply [Search](#) the State/Country and click [Save](#).

Geographic Origin Results

Geographic Origin

mexico

Geographic Origins
1 Result

GEOGRAPHIC ORIGIN NAME	COUNTRY/REGION	STATE/PROVINCE
GO-000018	Mexico	Yucatan

Cancel

Step 5: Navigate back to the Parent TC Input record and upload all the required files in the Files related list object (as per the guidance component).

Transaction Certificate Standards
GRS

Raw Material Stock Type
Recycled

▼ **Overview**

TC Input Number
TC-389292

Shipping Order Number
SO-8238923

Invoice Number
IN-37829832

▼ **System Information**

View All

Files (0) [Add Files](#)

[Upload Files](#)

Or drop files

TC Input History (1)

After uploading all the required documents, the client must set the 'Uploaded Documents' field to TRUE before submitting the TC Input.

TC Input
TCI-0006533

[Edit](#) [Clone](#) [Printable View](#)

▼ Pending **Submitted** Approved Rejected [Mark as Current Status](#)

Guidance for Success

- Your TC Input record has been submitted.
- You will receive an update on this shortly.

▼ **Information**

TC Input Name
TCI-0006533

Certified Company
[Leman Textile Ltd](#)

Seller of Materials
[Seller Business Partner](#)

Status
Pending

▼ **Certificate Type**

Reason For Rejection

Date of Submission

Last Audit Date

SCTC Supporting Documents Uploaded

TC Input Products (1) [New](#)

TC Input Prod...	Product Descri...	Raw Material I...	Purchased Ra...
TCIP-0018900	Women's appar...	6,000.00	6,000.00

[View All](#)

TC Input Standards (1) [New](#)

TC Input Standard N...	Reference Standard	Standard Version
TCI-3331	rbc	1.0

Once all the data and files have been created/uploaded, the client can **submit** the TC Input for review by changing the status at the top of the screen and clicking **Mark as Current Status**

This will lock the TC Input and the client will not be able to modify the status/data until the Technical Reviewer has completed the review.

Once the TC Input has been submit, the client will receive an email which confirms their TC Input Submission.



Dear Mark Matthews,

You have a new TC Input application that has just been submitted.

TC Input number: TCI-0006533
Company Name: Leman Textile Ltd

Please log into Source Clear for more information.

Best regards,

Source Clear Customer Service Team

DISCLAIMER: This is a system generated email please DO NOT REPLY to this email. If you have a follow-up question or feedback, please email us at sourceclear.support@intertek.com.

This email will be sent in the language of the client user.

The client will receive email updates whether the TC Input has been approved/rejected. In case of rejection, the Technical Reviewer will add Rejection comments in which the client can modify the TC Input request and re-submit.

This guide outlines the end-to-end guide on how client users submit Mass Balance Sheet records during their Transaction Certificate Request process.

Follow the steps in creating a Transaction Certificate request and adding all the necessary products from the associated Scope Certificate.

The screenshot shows the SourceClear interface for a Transaction Certificate (C-0000967). The status is 'Pending'. The record type is 'Transaction Certificate'. A progress bar shows stages: Pending (selected), Submitted, Revision, Draft, Approved, Declined, and Withdrawn/Cancelled. A 'Mark Status as Complete' button is visible. Key fields include Certified Company (Leman Textile Ltd), Related scope certificate (C-0000660), Last processor of certified product(s) (Subcontractor Business Partner), Buyer of Cert Prod - Main site (Vien - Buyer - Test 1), and Name of Consignee. A 'Guidance for Success' section lists instructions for providing information, populating key fields, adding products, including TC numbers, business partners, license numbers, and uploading documents.

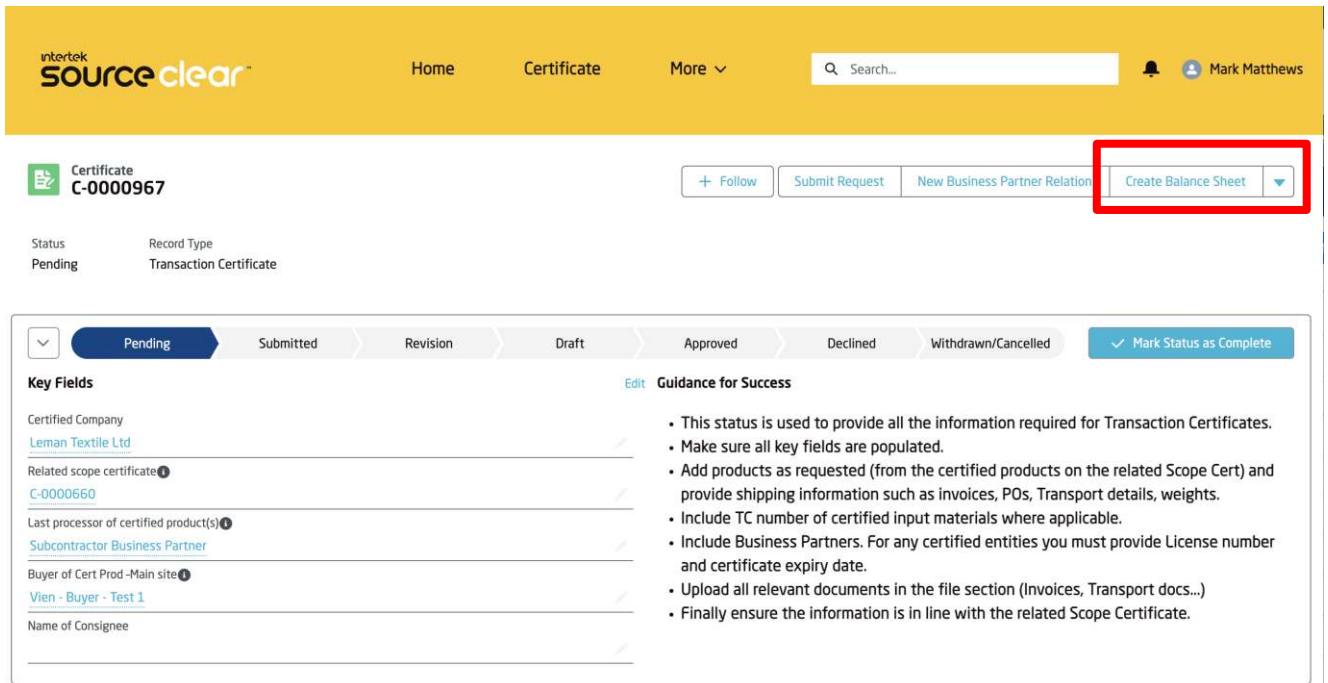
Ensure all the weight values are entered and the relevant records are created.

This screenshot displays detailed information for the certificate. On the left, a 'Download Certificate' button is present. The main area is divided into two columns of key-value pairs. The right column shows 'Business Partner Relations (0)', 'Certificate Standards (1)', and 'Certificate Products (1)'. The Certificate Standards table lists a standard (CS-0414) with a certified weight of 640.00 kg. The Certificate Products table lists a product (P-8751) with a certified weight of 50% Recycled post-c...

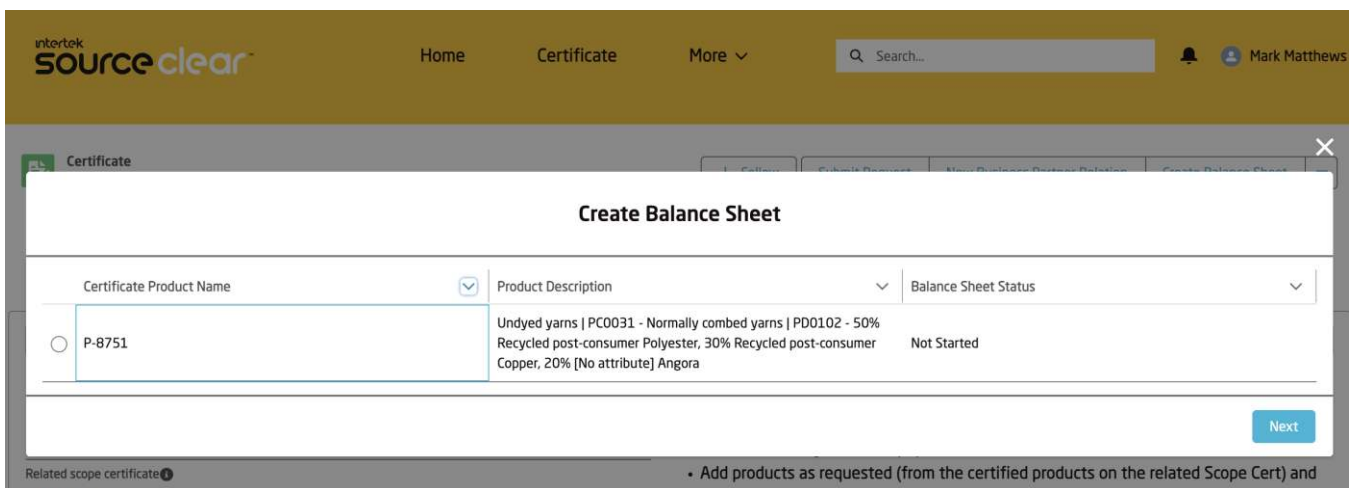
Certificate Standard...	Reference Standard	Standard Version	Certified Weight (Kg)
CS-0414	GRS	4.0	640.00

Certificate Product ...	Product Description SC	Material Composition ...	Product Status
P-8751	Undyed yarns PC00...	50% Recycled post-c...	

Once all the products and their compositions are created, navigate back to the parent TC record and click [Create Balance Sheet](#)



This will launch a screen where all the products listed under the TC will appear. The last column will display whether the Balance Sheet(s) have been fully completed for this product. Other status' include [In Progress](#) and [Completed](#)



Client users can use the last column to understand what product is still pending Balance Sheet creation. Certain clients will not be able to submit the TC if there are outstanding Balance Sheets to be created.

The next screen displays all the material compositions in each product. The user will select only the certified compositions for which to complete the Balance Sheet for.

Create Balance Sheet

Product Selection

Product Description: Undyed yarns | PC0031 - Normally combed yarns | PD0102 -
Gross Weight: 1,200kg
Supplementary Weight: 200kg
Net WeightProduct Net Weight: 1,000kg

Material Composition TCs

Raw Material	Attribute type	Reference Standard	Raw Material Certified Wei...	Percentage	Balance Sheet Created?
<input type="radio"/> Polyester	Recycled post-consumer	GRS	400	50%	
<input type="radio"/> Copper	Recycled post-consumer	GRS	240	30%	
<input type="radio"/> Angora	[No attribute]		160	20%	

Previous Next

If a client user selects a material composition that is not certified (Attribute Type = [No Attribute]) then an error message will appear to inform that this material composition cannot be chosen.

Also Note: There is a Balance Sheet Created column which will indicate whether a balance sheet has been submitted for a certified composition.

Once a Certified Material Composition has been chosen, then the next screen will display the **TC Input Stock** records which the client user can use for the Balance Sheet.

The screenshot shows the 'Create Balance Sheet' page. At the top, there's a navigation bar with 'Home', 'Certificate', and 'More' options. Below that, a search bar and a user profile for 'Mark Matthews' are visible. The main content area is titled 'Create Balance Sheet' and contains a 'Material Composition Selection' section. This section displays: Raw Material: Polyester, Reference Standard: GRS, Percentage: 50%, Certified Weight: 400kg, and Attribute Type: Recycled post-consumer. Below this, there are fields for 'Regeneration Total Verification GAP : 0' and 'Production Rate : 0'. The 'TC Input Products' section features a table with the following data:

TC Input Number	TC Input Product Name	Product Description	Raw Material Inventory (kg)	Input Amount KG
1 TC-1281	TCIP-0018897	Men's apparel PC0001 - Pants, trousers PD0003 - 90% Recycled post-consumer Polyester,10% [No attribute] Bamboo	3000	

At the bottom of the page, there are instructions: 'and certificate expiry date.', 'Upload all relevant documents in the file section (Invoices, Transport docs...)', and 'Finally ensure the information is in line with the related Scope Certificate.'

There is a collapsible summary table at the top of the screen which compiles the product and material composition which the user has chosen in the previous screens.

The TC Inputs which will appear in the section below will be based on matching:

- Raw Material
- Attribute Type
- Certified Standard

The client user must then enter the **weight of product(s)** used in order to manufacture the chosen TC material composition, captured by the **Certified Weight on the summary table**. Client users can chosen multiple TC Input products.

This screenshot shows the 'Create Balance Sheet' page with three rows in the 'TC Input Products' table:

TC Input Number	TC Input Product Name	Product Description	Raw Material Inventory (kg)	Input Amount KG
1 TC-1281	TCIP-0018897	Men's apparel PC0001 - Pants, trousers PD0003 - 90% Recycled post-consumer Polyester,10% [No attribute] Bamboo	3000	
2 TC-1281	TCIP-0018898	Unisex apparel PC0005 - Dresses, skirts PD0011 - 50% Recycled post-consumer Copper,50% Recycled post-consumer Polyester	4000	
3 TC-389292	TCIP-0018900	Women's apparel PC0002 - Sweaters, pullovers, cardigans PD0004 - 100% Recycled post-consumer Polyester	6000	600

At the bottom of the table, there are 'Clear Values' and 'Proceed' buttons. Below the table, there are instructions: 'and certificate expiry date.'

Once the user has entered the weight of the product(s) used, please click Proceed at the bottom of the screen. This will calculate the GAP and the Production Rate.

Create Balance Sheet

Material Composition Selection

Raw Material: Polyester Reference Standard: GRS Percentage: 50% Certified Weight: 400kg

Attribute Type: Recycled post-consumer

Regeneration Total Verification GAP : 200 Production Rate : 0.67

TC Input Number	TC Input Product Name	Product Description	Raw Material Inventory (kg)	Input Amount KG
TC-389292	TCIP-0018900	Women's apparel PC0002 - Sweaters, pullovers, cardigans PD0004 - 100% Recycled post-consumer Polyester	6000	600

GAP:

Certified Composition amount from the TC Input Product – Certified Weight from the TC Material Composition

Production Rate:

Certified Weight from the TC Material Composition / Certified Composition amount from the TC Input Product

There are validations in place to ensure that users cannot proceed with a GAP that is less than 0. Once complete, the client can click [Submit](#).

Create Balance Sheet

Success
Balance Sheet Submitted.

TC Input Number	TC Input Product Name	Product Description	Raw Material Inventory (kg)	Input Amount KG
TC-389292	TCIP-0018900	Women's apparel PC0002 - Sweaters, pullovers, cardigans PD0004 - 100% Recycled post-consumer Polyester	6000	600

Go Back **Submit**

Certificate C-0000967

Create Balance Sheet

Start Again Finish

expiry date.

After clicking Submit, the client can start again and complete the same process for all the remaining certified material compositions.

Once submitted, **two layers** of records are automatically created for each Balance Sheet submission. They can be found via the Material Composition related list

Layer 1: Balance Sheet

This record captures the **GAP & Production rate** of the material compositions entered by the client. It is the **parent** of all the associated TC Input records used in the balance sheet calculation. Each Material composition will have one Balance Sheet record.

Layer 2: Balance Sheet Material (Stock Log)

This record captures the **weight** entered by the client against the TC Input. It is a child record of the Balance Sheet and is also **related directly** to the TC Input Product record.

TC Balance Sheet Material
TCBSM-0002

Edit
Delete
Clone
▼

▼ **Information**

TC Balance Sheet Material Name TCBSM-0002	Status Pending
Certificate C-0000957	Material Type
TC Product P-8751	
TC Balance Sheet TCBS-0003	

▼ **TC Input Stock Log**

TC Input Product TCIP-0018900	Raw Material Regenerated Weight 600.00
Product Regenerated Weight 600.00	Raw Material Regenerated Weight 600.00

▼ **System Information**

Created By Mark Matthews , 23/05/2023 18:25	Last Modified By Mark Matthews , 23/05/2023 18:25
--	--

No related lists to display

From the TC Input Product page, the Stock Log record can also be accessed in the related list. Submitted Balance Sheets records which use this TC Input product will be seen here.

Home
Certificate
More ▼

Mark Matthews

TC Input Product
TCIP-0018900

Edit
Clone
Printable View

▼ **Product Details**

TC Input Product Name TCIP-0018900	Product Category Women's apparel PC0002
TC Input TCI-0006533	Product Details Sweaters, pullovers, cardigans PD0004
Product Description Women's apparel PC0002 - Sweaters, pullovers, cardigans PD0004 - 100% Recycled post-consumer Polyester	Material Composition TC 100% Recycled post-consumer Polyester

▼ **Stock Information**

Purchased Raw Materials Net Weight (kg) 6,000.00	Raw Material Inventory (kg) 6,000.00
	Total Certified Weight (kg) 6,000.00

▼ **System Information**

Created By Mark Matthews , 05/05/2023 17:08	Last Modified By Mark Matthews , 05/05/2023 17:10
--	--

TC Input Material Composition (1) New

TC Input Component Name	Raw Material	Attribute Type
TCIMC-36152	Polyester	Recycled post-consumer

[View All](#)

TC Input Stock Log (1) New

TC Balance Sheet M...	Product Regenerated...	Status	TC Product
TCBSM-0002	600.00	Pending	P-8751

[View All](#)

TC Input Product Standards (1)

TC Input Product Standard: T...	Reference Standard	Label Grade
TCIPS-3181	GRS	

[View All](#)

Page 5

The Raw Material Inventory value will be subtracted from all the Stock Logs only after the TC has been approved.

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TC Input Product
TCIP-0018900

Edit

Clone

Printable View

▼ **Product Details**

<p>TC Input Product Name TCIP-0018900</p> <hr/> <p>TC Input TCI-0006533</p> <hr/> <p>Product Description Women's apparel PC0002 - Sweaters, pullovers, cardigans PD0004 - 100% Recycled post-consumer Polyester</p>	<p>Product Category Women's apparel PC0002</p> <hr/> <p>Product Details Sweaters, pullovers, cardigans PD0004</p> <hr/> <p>Material Composition TC 100% Recycled post-consumer Polyester</p> <hr/> <p>Raw Material Inventory (kg) 5,400.00</p> <hr/> <p>Total Certified Weight (kg) 5,400.00</p>
---	--

▼ **Stock Information**

Purchased Raw Materials Net Weight (kg) 6,000.00	Raw Material Inventory (kg) 5,400.00
---	---

▼ **System Information**

TC Input Material Composition (1) New

TC Input Component Name	Raw Material	Attribute Type
TCIMC-36152	Polyester	Recycled post-consumer

[View All](#)

TC Input Stock Log (1) New

TC Balance Sheet M...	Product Regenerated...	Status	TC Product
TCBSM-0002	600.00	Approved	P-8751

[View All](#)

TC Input Product Standards (1)

Note:

If multiple Material Compositions are manufactured by the same TC Input, then the same weight should be entered during the Balance Sheet flow. Once the TC is approved, the weight entered (or the largest weight) will only be subtracted once from the TC Input Product Inventory.

To modify Balance Sheet submissions, the client must relaunch the Balance Sheet flow from the Create Balance Sheet button and enter the updated values and then submit.

If the TC is rejected, the Raw Material Inventory on the TC Input Product will not be subtracted.

Page 5

The Language of the user can be changed via the Language Selector component on the Home page. Currently the only languages supported in Source Clear are Chinese/English.

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Q Search...

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Check out the below resources:
General Standards

Once the user chooses their language, the page will reload and translate the portal in chosen language.

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Mark Matthews

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账号
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1个项目 • 已在几秒前更新

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1 Leman Textile Ltd	+0987654321				Unknown	SCTC 账号	09876

*语言
中文 (简体)

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Client User Guide

Version 1

April 2022