



Viewing and Editing Your Company Profile User Guide

For the SQFAD Assessment Database

Contents

Log Into SQFAD	2
Locate and View Your Company Profile.....	2
View Company Registration, Certificate, & Gross Sales	5
View Company User Profiles and Access	6
Edit Your Company Profile	7
Updating Your Company Website.....	7
Updating Food Sector Categories (FSCs).....	9
Adding & Removing Buyers.....	10
Adding and Removing a SQF-Licensed Certification Body	11
Create and Manage User Profiles	12

Viewing Your Company Profile

IMPORTANT: Please use Mozilla Firefox for an improved user experience. Using other browsers, such as Google Chrome or Internet Explorer may result in compatibility issues and complicate the registration process.

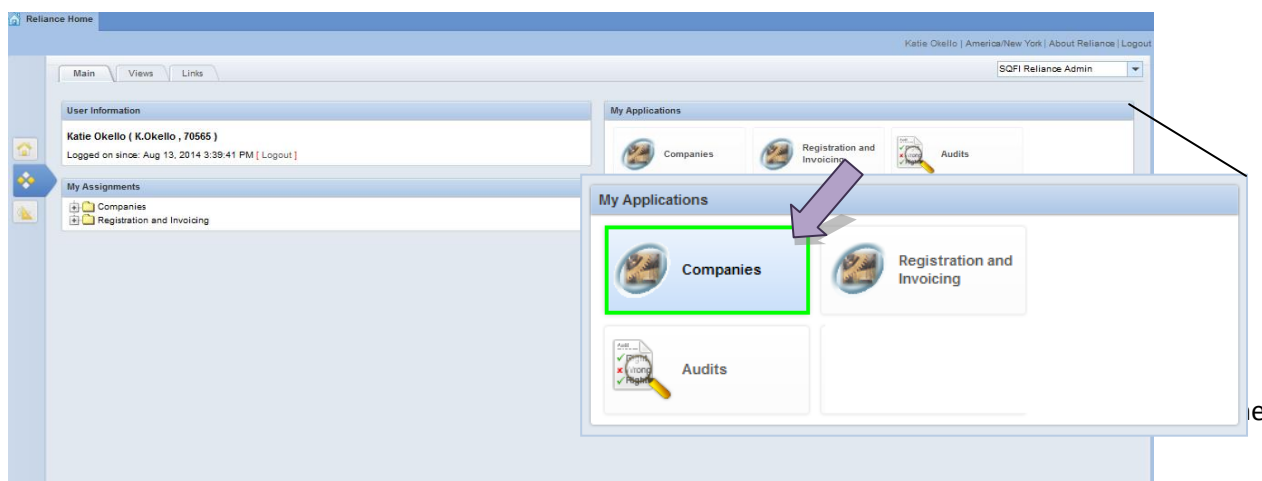
LOGIN TO SQFAD

- 1) Visit www.sqfi.com. Click on the “Suppliers” tab and select “Existing Users.”

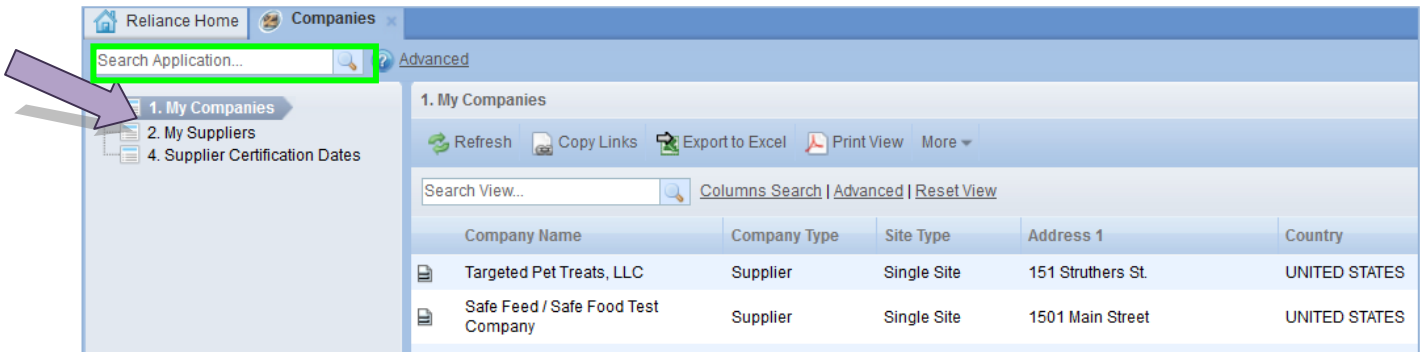
Type your username and password into the correct fields as demonstrated below. If at any time you forget your password, please select “Forgot Password.” A temporary password will be sent to the email address on file with login instructions. The system will prompt you to create a new password.

LOCATING AND VIEWING YOUR COMPANY PROFILE

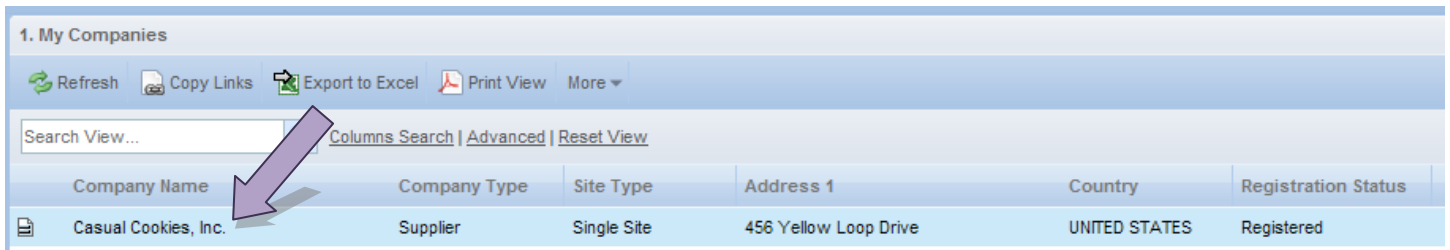
- 1) When logging into SQFAD after having been registered, you will first land on what is known as your **SQFAD portal**. Your portal houses your user information, assignments, and applications.
- 2) Within your portal, select “**Companies**” from “**My Applications**.”



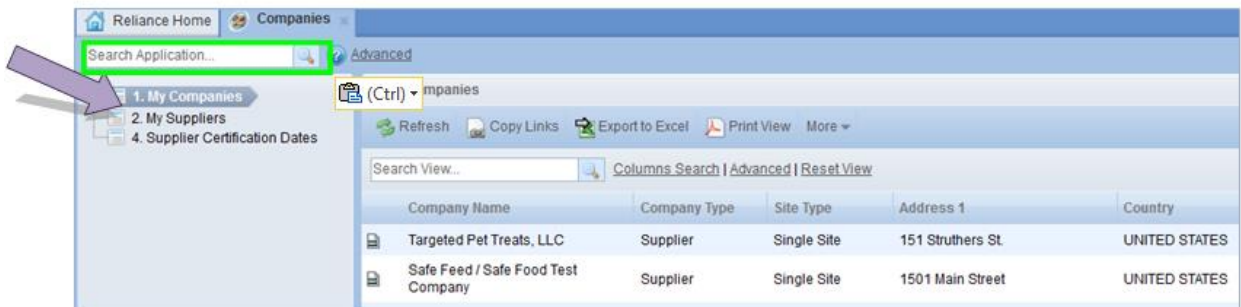
“Companies” application, you can locate any company you are currently listed as a contact for, regardless of the number of companies. Under the “My Companies” view from the left navigation bar, you will be able to view each company you are associated with in the right window.



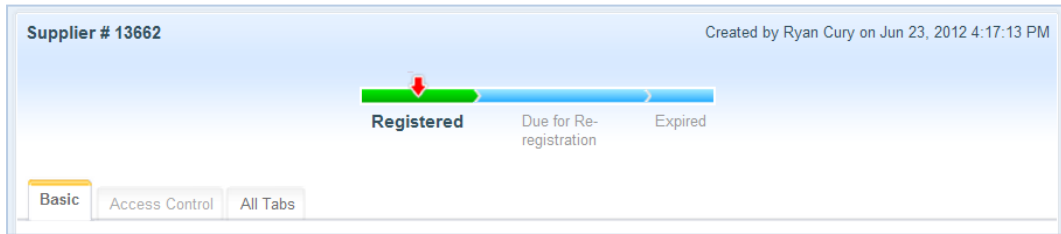
4) To access a company, simply select the company name, as show below.



If you are a contact for multiple companies, you can easily search for a company via the “Search View” field, by completing a search, or by sorting your companies per column. Then click on a company name in order to enter the **Company Profile**.



Entering your company profile will open a new tab where you can view your company profile. At the top of this tab you will notice what is known as a **phase tracker**. This phase tracker simply tracks the status of your SQFAD assessment database registration at any given time.



PHASE TRACKER

Registered – during the “Registered” phase, your facility is considered active. **You will not be able to re-register a company during this phase.**

Due for Re-registration – begins 90 days prior to your company registration’s expiration. Notification is sent via automated email. You are able re-register your company during this phase.

Expired – your company will enter the “Expired” phase on the date of your registration expiration.

IMPORTANT: If your company enters the “Expired” phase, your current SQF certificate can be invalidated due to registration expiration.

Beneath the phase tracker is what is known as your **company profile form**. Here you are able to view and edit company information.

The form is titled 'Company Information' and contains the following fields:

- Company Number: 13662
- Company Name: Casual Cookies, Inc.
- Company Type: Supplier
- Site Type: Central Site Sub-Site Seasonal Single Site
- Address 1: 456 Yellow Loop Drive
- Address 2: Suite 2
- Country: UNITED STATES
- City: Orlando
- State / Province: Florida
- Postal Code: 12345
- Phone Number: 164-469-6540
- Fax Number: 164-469-8200
- Company Website:
- Company Description:
- Applicable Food Sector Categories:
- Buyers:
- Certification Body:

VIEW COMPANY REGISTRATION, CERTIFICATE, & GROSS SALES

REGISTRATION STATUS

Your most current registration status is accessible on your Company Profile at any time. This information is housed beneath your selected Certification Body within your Company Profile.

Registration			
Registration Status Registered	Initial Registration Date Feb 28, 2013	Re-registration Date	Registration Expiration Date Feb 28, 2014
Gross Sales ≤ \$100,000.00 USD	Classification A	Amount USD 100.00	

IMPORTANT: The “**Registration Expiration Date**” is the specific date that your company is set to expire. It is crucial that your company is re-registered prior to this date to ensure that you are active and registered within the system.

CERTIFICATE STATUS

Your most recent certificate information will also be made available to you on your Company Profile beneath your assessment database registration status. **Companies who have not yet completed an audit are considered registered but not yet certified.** Please see the screen shots below to better visualize how this will reflect in SQFAD depending upon variations in certificate status.

NOT YET CERTIFIED

Certification		
Certificate Status Not Yet Certified	Certificate Number	Certified Audit Type
Current Score	Current Rating	Unannounced Audit Cycle
Certificate Decision Date	Certificate Issue Date	Certificate Expiry Date
Re-Certification Audit Due Date (+/- 30 days)		
Initial Certificate Decision Date	Initial Certificate Issue Date	Initial Certification Audit End Date

CERTIFIED

Certification		
Certificate Status Certified	Certificate Number 102115	Certified Audit Type Recertification Facility Audit Ed. 7.1 Lv. 2
Current Score 99	Current Rating E - Excellent	Unannounced Audit Cycle 2014-2017
Certificate Decision Date Nov 14, 2013	Certificate Issue Date Nov 14, 2013	Certificate Expiry Date Nov 14, 2014
Re-Certification Audit Due Date (+/- 30 days) Oct 26, 2014		
Initial Certificate Decision Date Nov 28, 2012	Initial Certificate Issue Date Nov 28, 2012	Initial Certification Audit End Date Oct 26, 2012

GROSS SALES

The most recent gross sales range selection, classification, and amount (USD), are made available to you beneath your company certificate information. This information is specific to your most recent registration or re-registration with SQFAD.

Registration Status Registered	Registration Expiration Date Jun 23, 2013	
Certificate Status Not Yet Certified		
Next Audit Date		
Gross Sales > 5 million USD ≤ 25 million USD	Classification C	Amount USD 350.00

VIEWING COMPANY USER PROFILES AND ACCESS

At the bottom of the **Company Profile Form** you will find user profiles associated with your company. Here you may add additional user profiles and indicate whether a user is a primary contact, a billing contact, or both.

CONTACT TYPES

Primary Contact – Primary Contacts are those users who will work within SQFAD regularly. These individuals will have the most editing rights within your Company Profile. There is no limit to how many individuals can be listed as primary contacts. This contact can edit the following fields:

- Company Phone and Fax Numbers
- Company Website
- Company Description
- Applicable Food Sector Categories
- Buyers
- Certification Body
- Registration/Re-registration Forms
- Add/Remove/Reorder Company Contacts
- Own User Profile
- Create Internal Audit Plan
- Schedule Internal Audit
- Corrective Actions
- Print Audit and Corrective Action Reports

Billing Contact – This level of access is for users who will register or re-register your company(ies). The Billing Contact can be the same individual as the Primary Contact. There is absolutely no limit to how many Billing Contacts there are for a particular company. This contact type will be granted editable access to the following information:

- Own User Profile
 - Registration/Re-registration Forms
-

Editing Your Company Profile

You are able to edit many items within your company profile; however, some fields are read-only as SQF audits are site-specific. Below is a breakdown of fields which may be edited by the user and which fields are read-only.

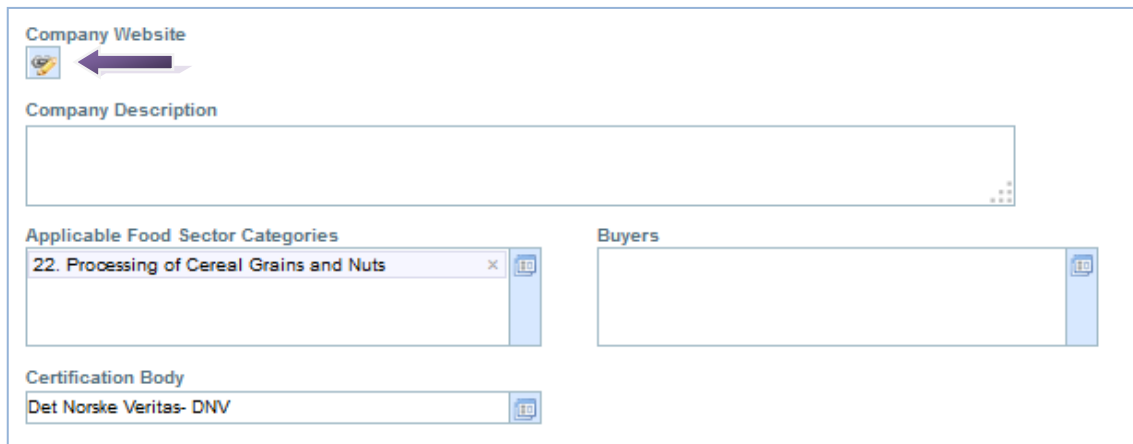
EDITABLE FIELDS IN COMPANY INFORMATION SUBFORM

- Phone Number & Fax Number
- Company Website
- Company Description
- Applicable Food Sector Categories
- Buyers
- Certification Body

If you have a change needed at any time to any of the read-only fields, please contact your Certification Body to assist in having this information updated on your behalf.

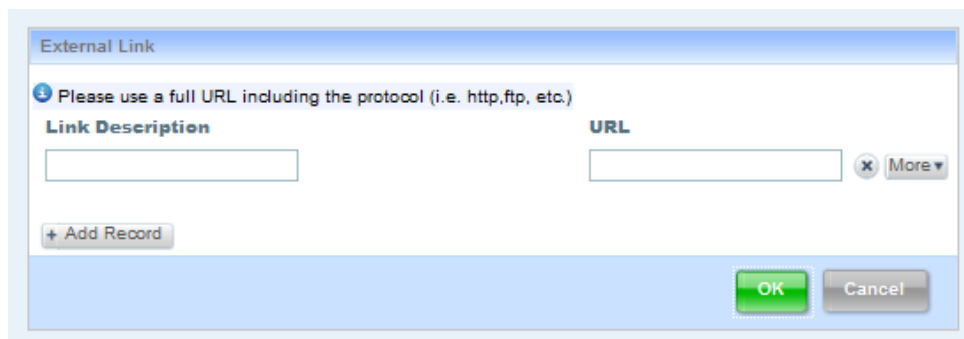
UPDATING THE COMPANY WEB ADDRESS

Step 1: To enter your company website, simply select the hyperlink icon, as shown below.



The screenshot shows a form titled 'Company Profile' with several fields. The 'Company Website' field is at the top, followed by 'Company Description', 'Applicable Food Sector Categories', 'Buyers', and 'Certification Body'. A purple arrow points to a small icon in the 'Company Website' field, which is used to open a dialog for adding a new website link.

Step 2: In the new window, enter the “**Link Description**” and the desired web address. You may also enter a company email address. Primary Contacts may add multiple sites to the Company Profile.



The 'External Link' dialog box contains a message: 'Please use a full URL including the protocol (i.e. http,ftp, etc.)'. It has two input fields: 'Link Description' and 'URL'. There is a '+ Add Record' button at the bottom left and 'OK' and 'Cancel' buttons at the bottom right.

Step 3: To add new websites, simply select the “Add Record” button at the bottom left hand corner of the last website listed. A new “Link Description” and “URL” field will appear for you.

External Link

Please use a full URL including the protocol (i.e. http,ftp, etc.)

Link Description: Casual Cookie, Inc. Website

URL: http://www.casualcookies.com/

+ Add Record

OK Cancel

External Link

Please use a full URL including the protocol (i.e. http,ftp, etc.)

Link Description: Casual Cookie, Inc. Website

URL: http://www.casualcookies.com/


Casual Cookie, Inc. Email

mailto:info@casualcookies.com

+ Add Record

OK Cancel

NOTE: When entering a web address within SQFAD, you must ensure that the entire link is placed within the “URL” field, including **http://**. Copy and paste the web address directly into the “URL” field to ensure the web address is entered correctly. When entering a generic email address, you must include the words **mailto:** prior to the email address itself to ensure that the email address links correctly on your Company Profile.

To remove an unwanted link, simply select the  to the right of the “URL” field.

Link Description: Casual Cookie, Inc. Website

URL: http://www.casualcookies.com/

Casual Cookie, Inc. Email

mailto:info@casualcookies.com

Company Website

- Casual Cookie, Inc. Email
- Casual Cookie, Inc. Website

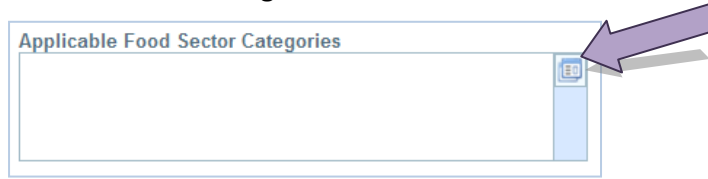
You may also have a “Company Description” added to your Company Profile, as shown below.

Company Description

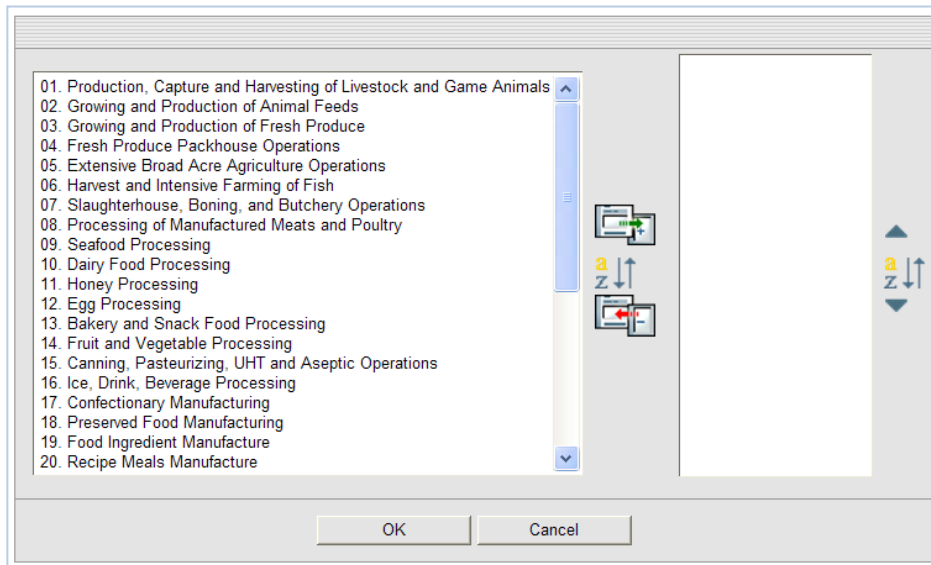
This field is for any additional information you would like to have placed in your Company Profile. There is no limit to how much text is within this field.

UPDATING FOOD SECTOR CATEGORIES (FSCS)

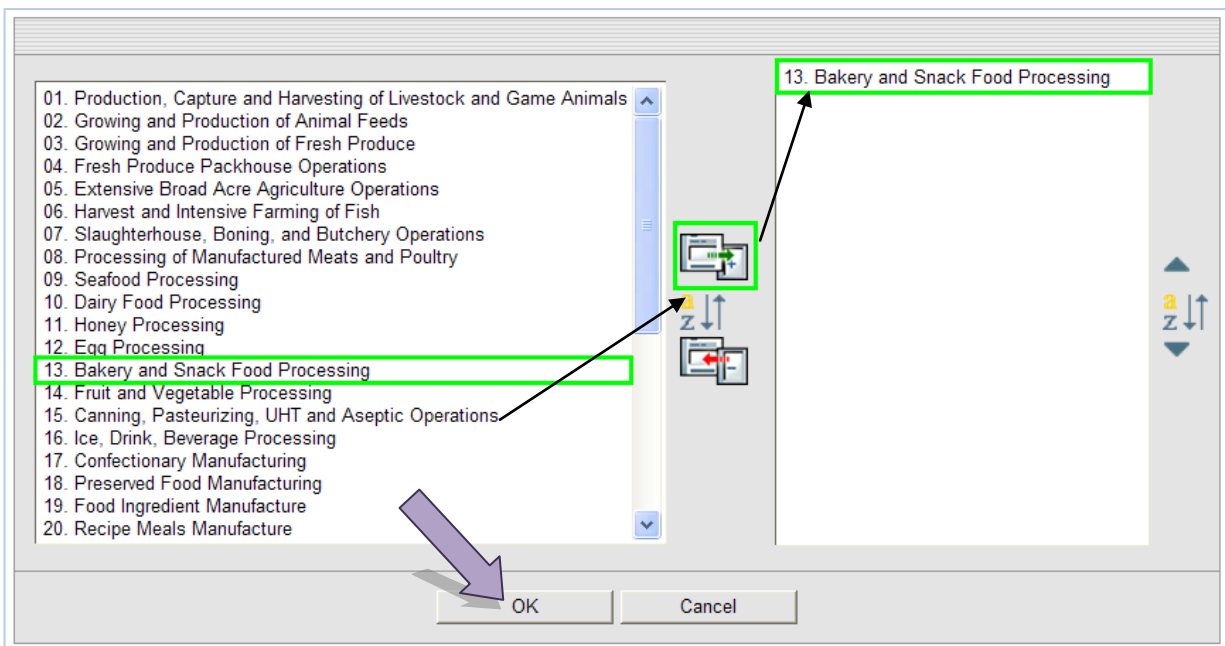
Step 1: To select your applicable food sector categories, or FSC's, simply click on the search icon to the right of the "Applicable Food Sector Categories" field.



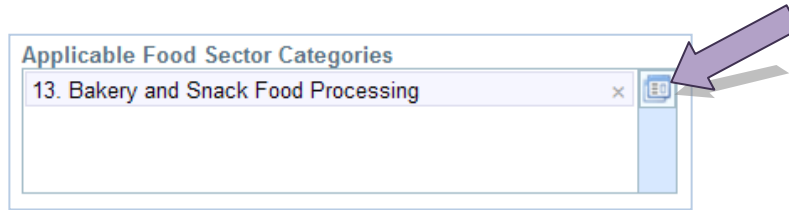
This will open a new window enabling you to select and choose which particular FSC's apply to your facility. This field is very important, as it represents the FSC's to which you will be audited against.



Step 2: Select all applicable FSC(s). Once your selections have been made, you can have your selected FSC's added to the right window by clicking on the "Add" button, as shown below.

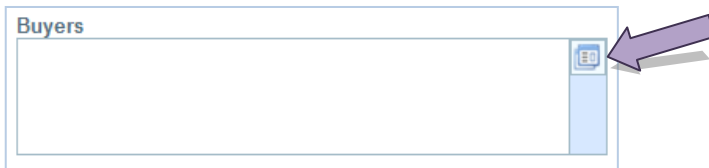


Select **“OK”** to return to your Company Profile. You will now notice your selected FSC’s listed. To remove any unwanted FSC simply scroll over that FSC and select the **“X”** that appears to the right, as shown below.



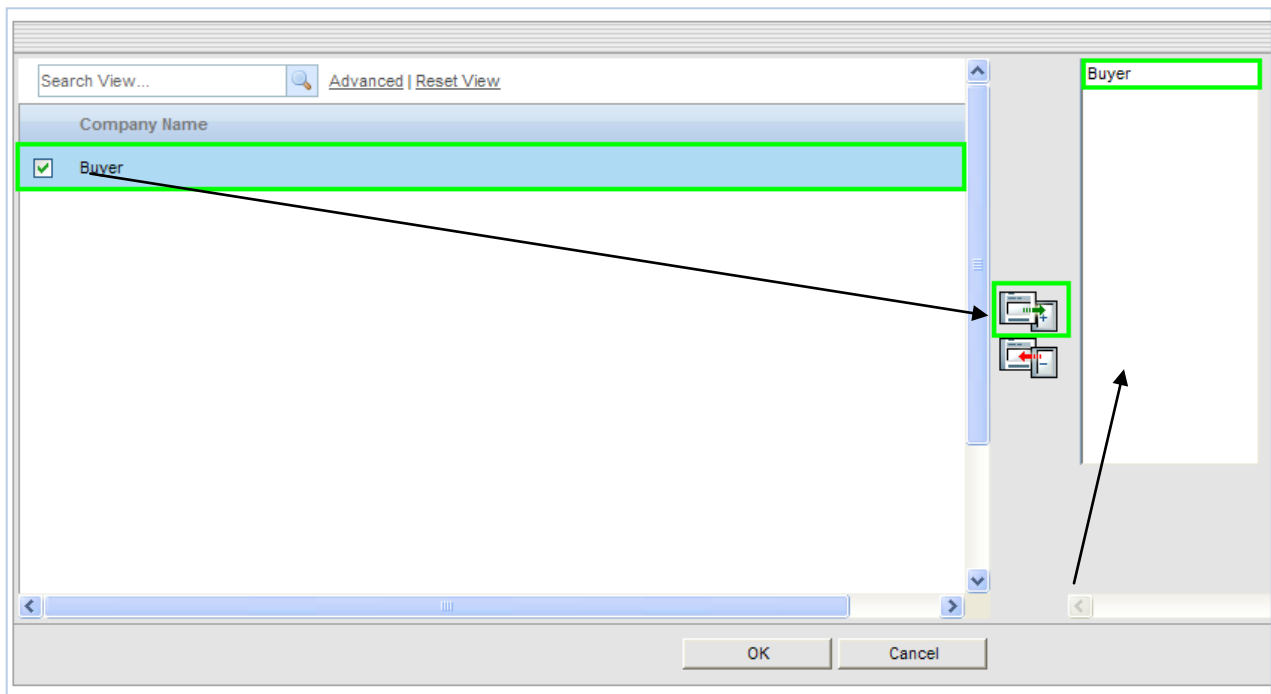
ADDING & REMOVING BUYERS

Step 1: Click on the search icon to the right of the **“Buyers”** field. This will open a new window, enabling you to choose from a list of available Buyers to add to your Company Profile.



Adding a Buyer to your Company Profile only grants that Buyer access to your Audit and Corrective Action Reports. Your Buyer will **not** be able to view any additional information within SQFAD.

Step 2: Select the Buyer(s) from the left hand window via the check box. You can select multiple Buyers at once, adding them to the right hand window with one click.



NOTE: If a Buyer does not appear within the system, and you have searched for that Buyer within the “Search View” field, the Buyer does not exist within SQFAD.

If a Buyer would like to be added to the SQFAD system, the Buyer’s representative must contact SQFI at SQFAD@sqfi.com requesting to be added into the system. Once added into the system, you may add the Buyer to your Company Profile and share your audit reports.

Select “OK” to be brought back to your Company Profile. Your Buyer will be visible on your company profile. You may also remove an unwanted Buyer in the future by simply scrolling over the unwanted Buyer, and selecting the “X” that appears on the right.

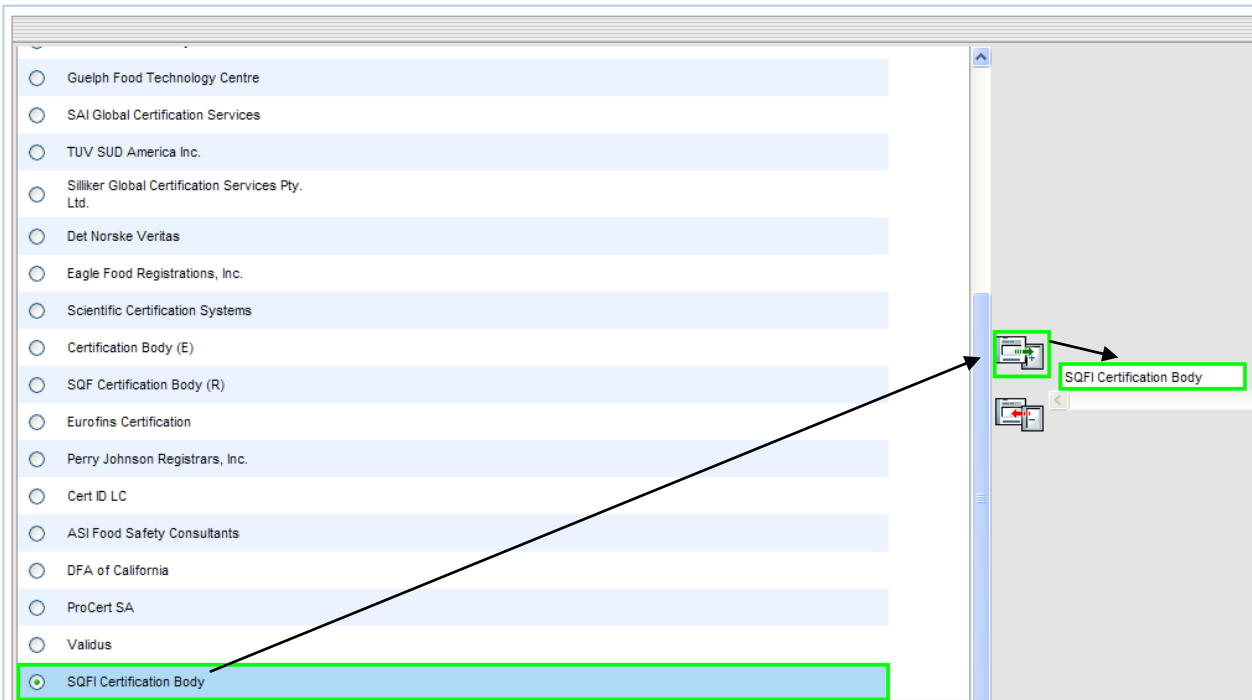
ADDING & REMOVING A SQFI-LICENSED CERTIFICATION BODY

Step 1: Click on the search icon to the right of the “Certification Body” field.



IMPORTANT: Selecting a Certification Body should be the first item you update within your Company Profile when entering SQFAD for the first time.

Step 2: To have a Certification Body added, select your desired Certification Body from the left hand and click the “Add” button.

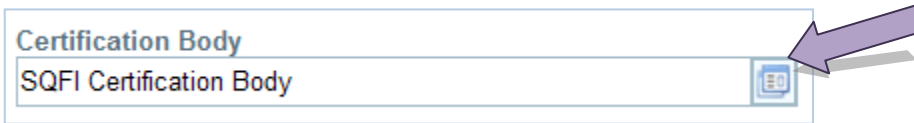


Once you have chosen a certification body, they will be able to view your Company Profile from their end within SQFAD. They will also be able to prepare audit materials for your facility. Select “OK” to return to the Company Profile.

REMOVING AND REPLACING A CERTIFICATION BODY

IMPORTANT: You are unable to change your Certification Body if you are currently undergoing an audit or your certificate status has been suspended or withdrawn.

If these conditions do not apply, you can replace your certification body by selecting the search icon to the right of the “Certification Body” field.

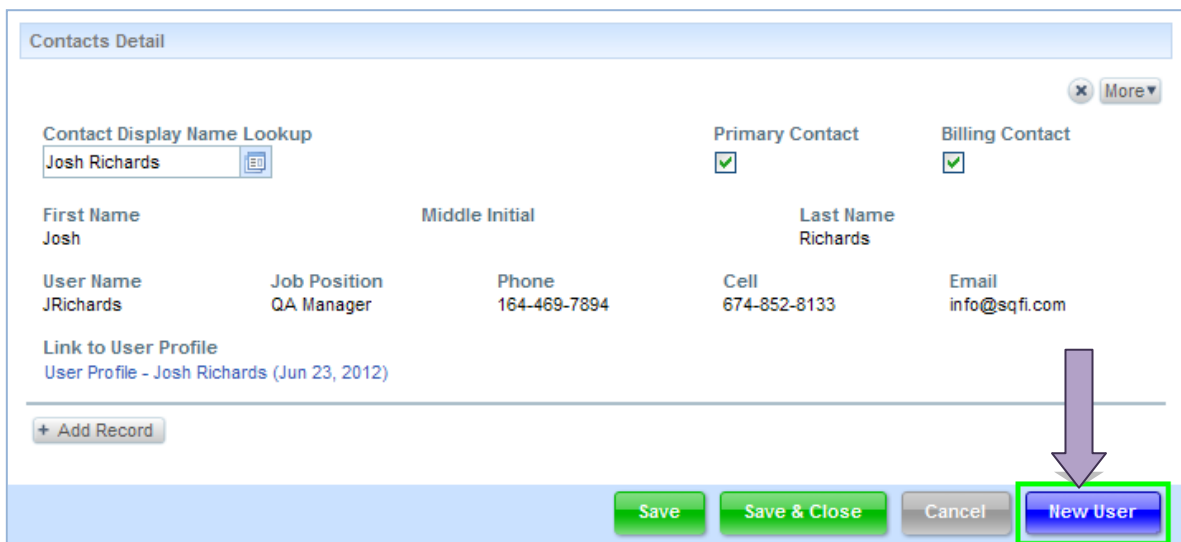


CREATE AND MANAGE USER PROFILES

As a Primary Contact, you have the ability to add multiple users to your company profile and determine each individual’s level of access. These contacts can consist of new users (those not yet having a user account in SQFAD) or existing users (those with an existing user account in SQFAD). **Only a Primary Contact has the ability to add contacts to a Company Profile.**

ADDING NEW CONTACTS TO YOUR COMPANY PROFILE

- 1) In order to add a new contact, **you must first create their user profile.** After creating the user profile, it must be **added to the Company Profile.** At the bottom of your Company Profile, select the “New User” button.



- 2) After selecting “New User,” you have entered into a blank “User Profile.” Fill in the correct information into the new User Profile.

NOTE: Please note the username you created. Select **Save & Close** to return to the Company Profile.

- 3) To add the recently created user to your company profile, scroll down to the company contact sub-form and select “Add Record.”

- 4) After selecting “Add Record,” a new, blank contact sub-form will appear. You may now search for that contact by typing their display name into the Contact Display Name Lookup field.

The screenshot shows a contact sub-form with a search field labeled "Contact Display Name Lookup" containing the text "Lindsey Proct". A dropdown menu is open below the search field, showing the name "Lindsey Procter". To the right of the search field are checkboxes for "Primary Contact" and "Billing Contact", both of which are currently unchecked. Below the search field, there are fields for "First Name", "Middle Initial", and "Last Name". At the bottom, there are fields for "User Name", "Job Position", "Phone", "Cell", and "Email". A link labeled "Link to User Profile" is also visible.


- 5) After adding the new contact determine whether that user will be listed as a primary contact, billing contact, or both. **IMPORTANT:** Contact SQFI to receive a temporary password for each new user.

The screenshot shows the contact sub-form with the search field now containing "Lindsey Procter". The contact details are filled in: First Name: Lindsey, Middle Initial: (blank), Last Name: Procter, User Name: LProcter, Job Position: QS Manager, Phone: 164-645-9878, Cell: (blank), and Email: lprocter@casualcookies.com. The checkboxes for "Primary Contact" and "Billing Contact" are still unchecked. A link labeled "Link to User Profile" is present, with the text "User Profile - Lindsey Procter (Jun 27, 2012)" below it.

ADDING EXISTING CONTACTS TO YOUR COMPANY PROFILE

- 6) When a contact already exists as a user within SQFAD, select “Add Record,” then search for the contact to have added to your Company Profile. Any primary contact can edit each individual’s level of access and all users on the company profile can access the company profile.

DELETING CONTACTS FROM YOUR COMPANY PROFILE

- 7) As a Primary Contact, you can edit or delete contacts from your Company Profile. To delete a contact from your Company Profile, simply select the  to the right of the contact sub-form.

The screenshot shows the contact sub-form with the search field containing "Lindsey Procter". The contact details are filled in: First Name: Lindsey, Middle Initial: (blank), Last Name: Procter, User Name: LProcter, Job Position: QS Manager, Phone: 164-645-9878, Cell: (blank), and Email: lprocter@casualcookies.com. The checkbox for "Primary Contact" is now checked, and the checkbox for "Billing Contact" is still unchecked. A link labeled "Link to User Profile" is present, with the text "User Profile - Lindsey Procter (Jun 27, 2012)" below it. The delete icon (an 'x' in a circle) in the top right corner of the form is highlighted with a green box.

NOTE: If you accidentally delete a contact from your Company Profile, you can easily have them added back to your Company Profile by following **Step 5**. **Please manage the contacts within your company to ensure that your contact list is accurate.**