How to grant ESR access to CB contacts

Access to ESR can be granted to additional CB contacts by Certification Bodies that have access to the FSC Database (Salesforce).

Important Note 1: Please ensure that your account is fully set up before accessing the ESR application. You must first create your account in the FSC database and receive an activation email. After receiving the email, activate your account as instructed. Attempting to log in to the ESR application prior to activation may result in the creation of duplicate accounts and subsequent functionality issues.
If you encounter any problems or inadvertently create duplicate accounts, please contact FSC to resolve the issue promptly.

Important Note 2: Ensure that you begin by creating the CB Admin account and wait for it to be activated and operational in the ESR Registry. Once the CB Admin has successfully logged into ESR, you may proceed with creating the CB Auditor account. Creating the CB Auditor account before the CB Admin logs in will result in account malfunctions.
If you experience issues arising from this sequence, please contact FSC for assistance in resolving the problem.

CB Contacts can create CB Admin and CB Auditors by following the steps below.

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1. Adding New contacts and Granting access to ESR

1.1. On Salesforce, in the search bar search for your specific CB organization name or CB License code and open.
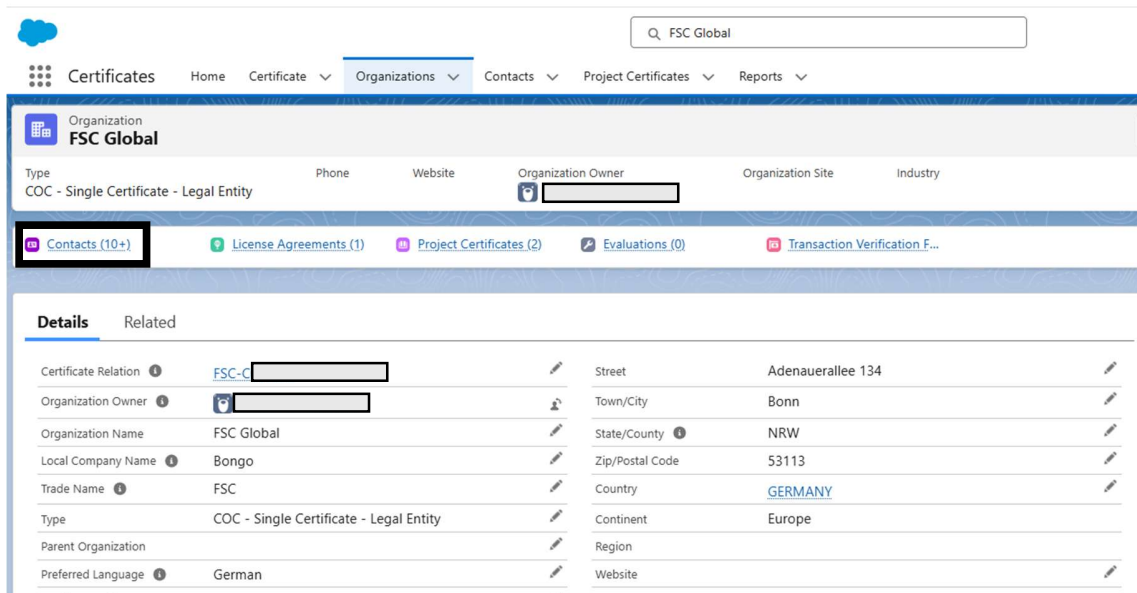
Please note that the CB contact should be created under the CB organization and not under a Certificate Holder organization.

1.2. Next navigate to **Contacts** section. You can create new contacts or open existing contacts.
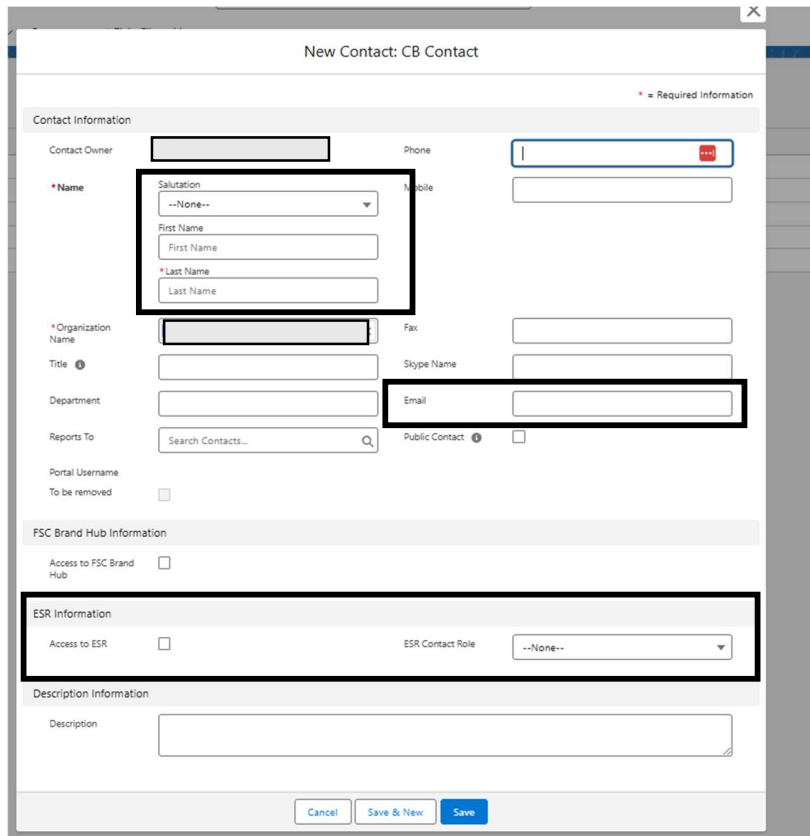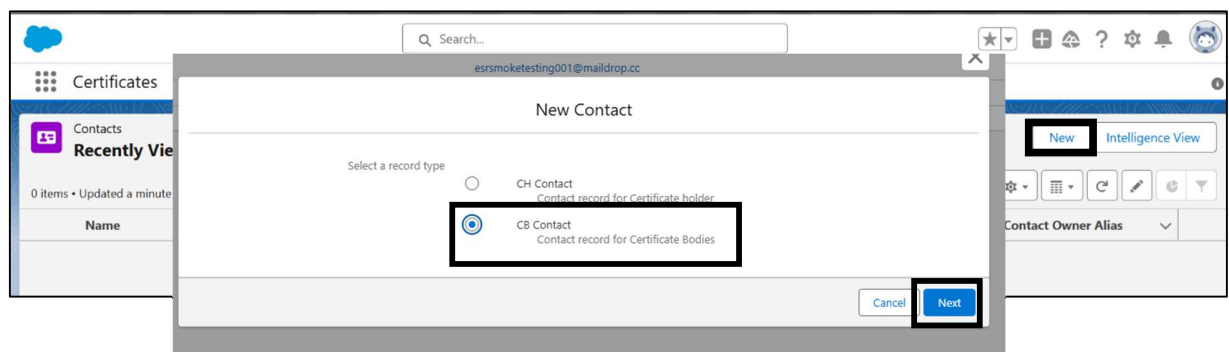

1.3. Select CB Contact and click **Next.**

1.4. Enter the following information under the **Contact Information section** of the page as required.
- Enter the **First Name, Last Name.**
- The related **Organization Name** is automatically populated.
- Enter the Email address.

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- In the **ESR Information** section, click the "**Access to ESR**" check box and choose the "**ESR Contact Role**"
- You can repeat this step to add more CB contacts.

1.5. Click **Save** – to save contact details and display the created contact.

2. Granting access to existing CB Contacts

On Salesforce navigate to **Contacts** section. Search and open the CB contacts you already have under your CB Organization or CB License code.
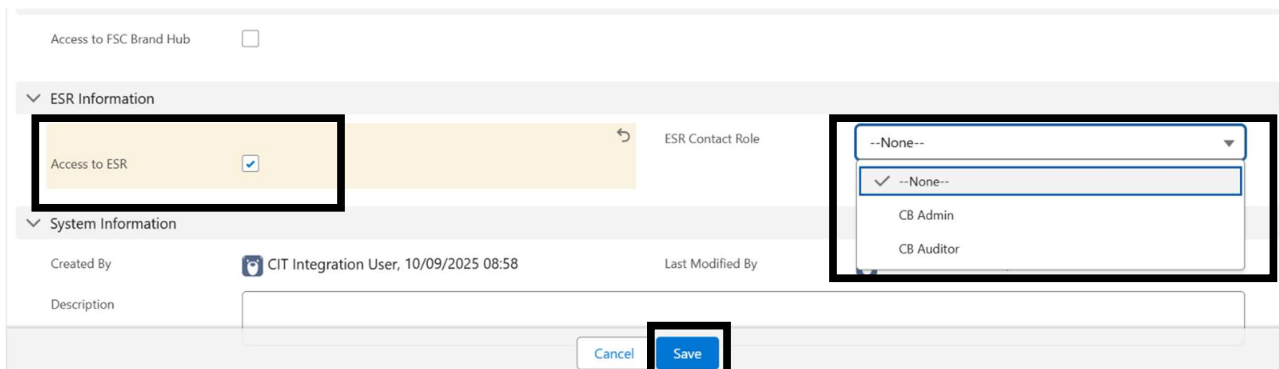
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2.1. From the CB Organization detail page, navigate to Contacts.
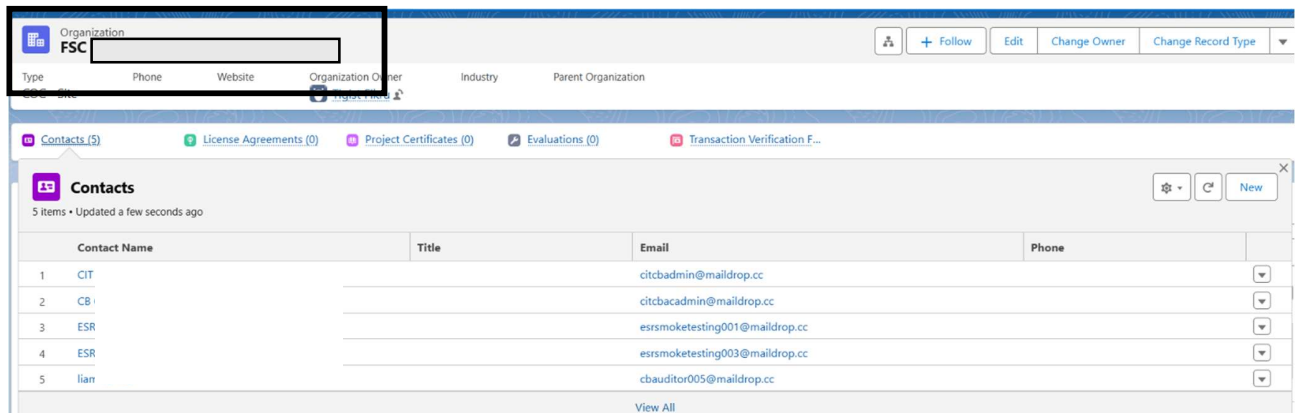
2.2. Open the contact to grant ESR access for. In the contact details page, there is a new section "**ESR Information**" as shown below.
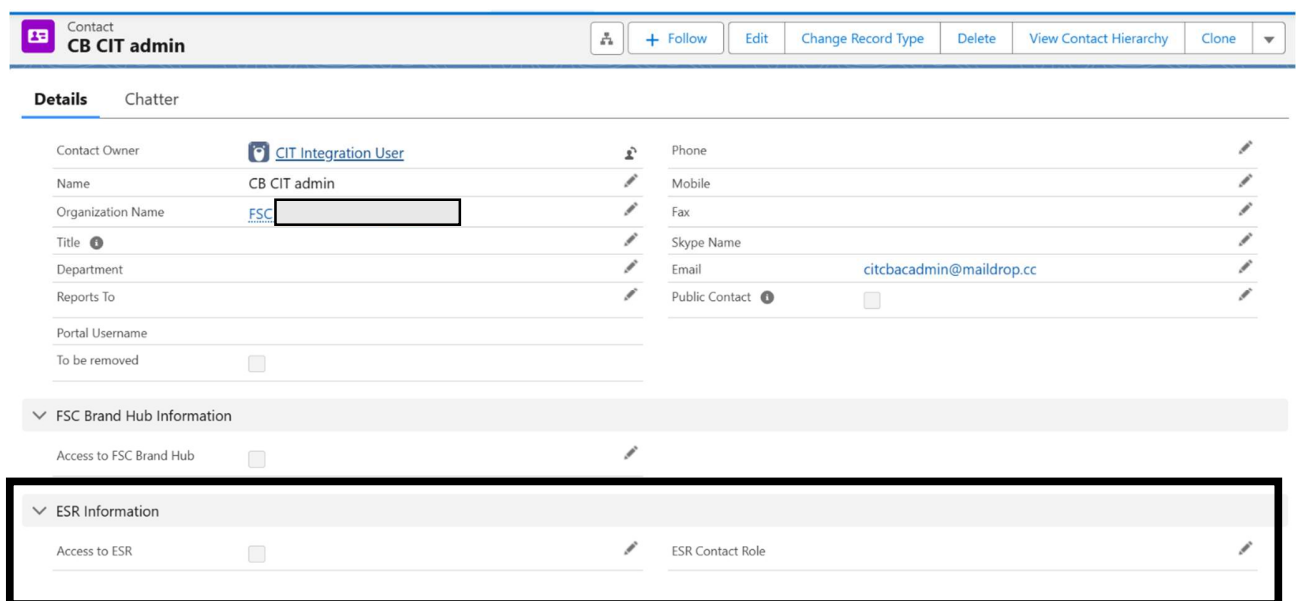
2.3. Mark the checkbox and choose the CB Contacts role and click 'Save". If the contact has an FSC connect account already, they will receive a "Welcome to ESR" email invitation. If the contact does not have an FSC Connect account, they will first receive an email to activate FSC Connect; once successfully activated they will login to the ESR application.

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Note: Emails are sent from the address notification@fsc.org ; please advise contacts to whitelist this email address or check the spam folder if the emails are not received.

Important Note 3: When revoking access to ESR for a contact or granting it again, it is important to allow some time for the process flow to finish. Concurrent processing of access granting and revoking can lead to failures due to parallel execution.

Important Note 4: Please refrain from changing a user's role from CB Admin to Auditor or from Auditor to CB Admin within Salesforce. If a role change is necessary, contact FSC for assistance. They will guide you through the process to ensure it is done correctly.

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