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1. Creating an account in CREST Membership Portal

a) E-mail invitation

Please check your inbox, you will have received an e-mail with the subject “CREST International - membership portal registration”.

If you have not received an e-mail, please contact **crestcamp@crest-approved.org**.

b) Create your user profile

Please click “**Join now**” to create your user profile and choose a password to start populating your application forms.

Click “**Register as an individual**”.

The screenshot shows a registration page with the following elements:

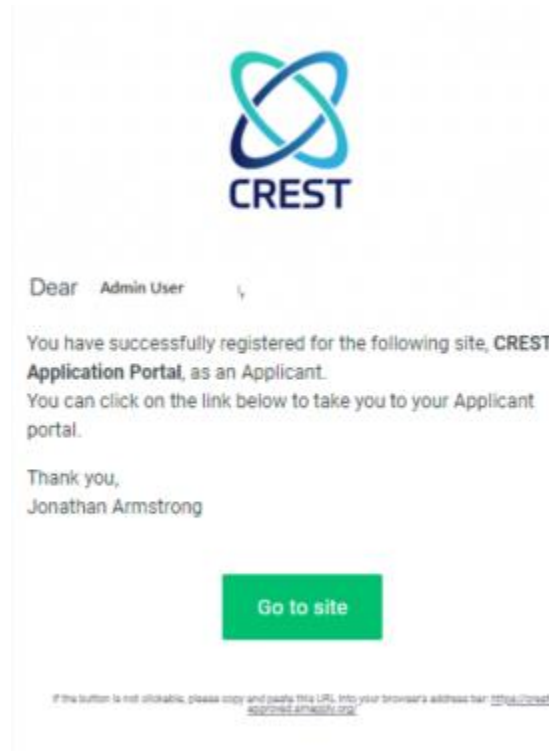
- Header: "You've been invited to be an Applicant on this site" in red, followed by "Register for your account below" in grey.
- Registration Method: "Register with" followed by a red button with a white "G" logo.
- Separator: "OR" in grey.
- Registration Type: Two radio buttons. "Register as an individual" is selected (indicated by a green dot). "Register as an organization" is unselected.
- Form Fields: "First name" and "Last name" (both containing "Test"), "Email" (containing "htiaarsqwhonvvvwn@ytnhy.com"), "Password", and "Confirm password" (both with eye icons for visibility).
- Disclaimer: "By registering for an account, you agree to our [terms of service](#) and [privacy policy](#)".
- Button: A blue "CREATE ACCOUNT" button.
- Footer: "By registering, you agree to receive email communications from us. You may unsubscribe at any time."

Click “**Create Account**” to complete account creation.

Please note, the first user to create an account will be designated as the primary Admin.

c) E-mail confirmation

You will receive an e-mail confirmation of your registration, please click “**Go to site**”.



2. Logging in and navigating to your organization

a) Logging in to your CREST Membership Portal

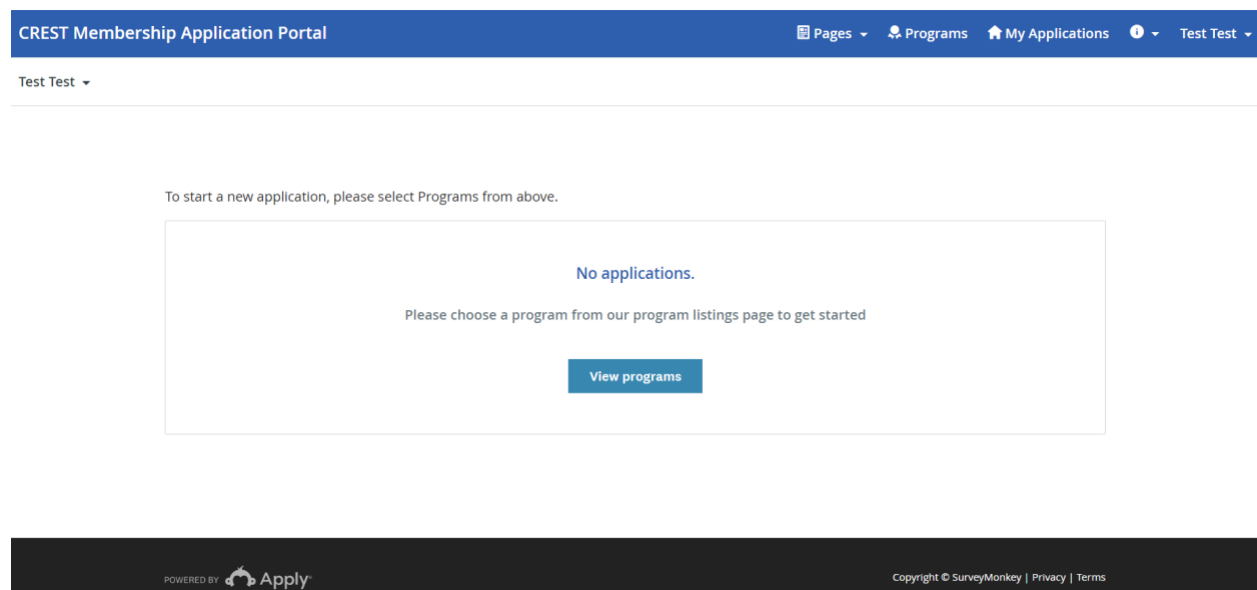
On the login page, enter your **Username** and **Password** in the retrospective fields.

If you forget your password, click “**Forgot your password**” to reset it.

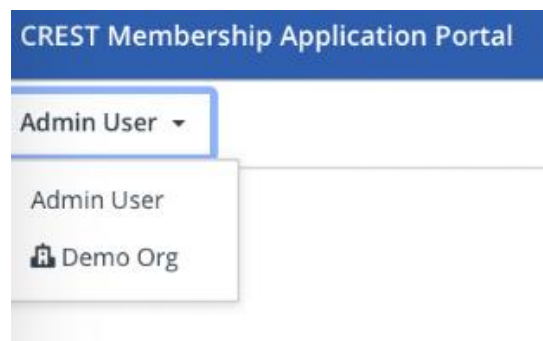
Click “**Login**” to access the CREST Membership Portal.

b) Navigate to your organization

After logging in, you will be directed to the “**Dashboard**”.



On the left-hand side of the page, look for a tab or button labelled with your username e.g. “**Admin User**”.



Click on the relevant tab to proceed e.g. “**Demo Org**”.

Click on “**View Programs**” and you will be directed to the “**Eligible Programs**” page.

Eligible Programs ▾

Search programs...



Pathway Onboarding Form

Complete this form to start your journey on the Pathway to Membership and Accreditation.

Organizations can apply.

MORE >

1 - 1 of 1 Programs

Click on “**More**” to proceed to an overview of the application.

Click “**Apply**”.

APPLY

Open to

Organizations can apply.

Categories

Pathway to Membership and Accreditation

You will now be able to view and populate the Pathway Onboarding Form, which should appear as follows:

The screenshot displays the Pathway Onboarding Form interface. On the left, a sidebar shows task progress: "0 of 8 tasks complete" with a progress bar, "Last edited: 6 Sep 2024 02:44 PM (BST)", and "REVIEW" and "SUBMIT" buttons. Below this, the user is identified as "Admin User" (AU) with a "View & edit" link and an "Add Member or Team" button. The main content area shows the form title "Pathway Onboarding F...", ID "PATH-2730337852", and status "Demo Org Status: In Progress". It has tabs for "APPLICATION" and "ACTIVITY". A "Your tasks" section lists seven sections, each with a document icon and a right-pointing arrow:

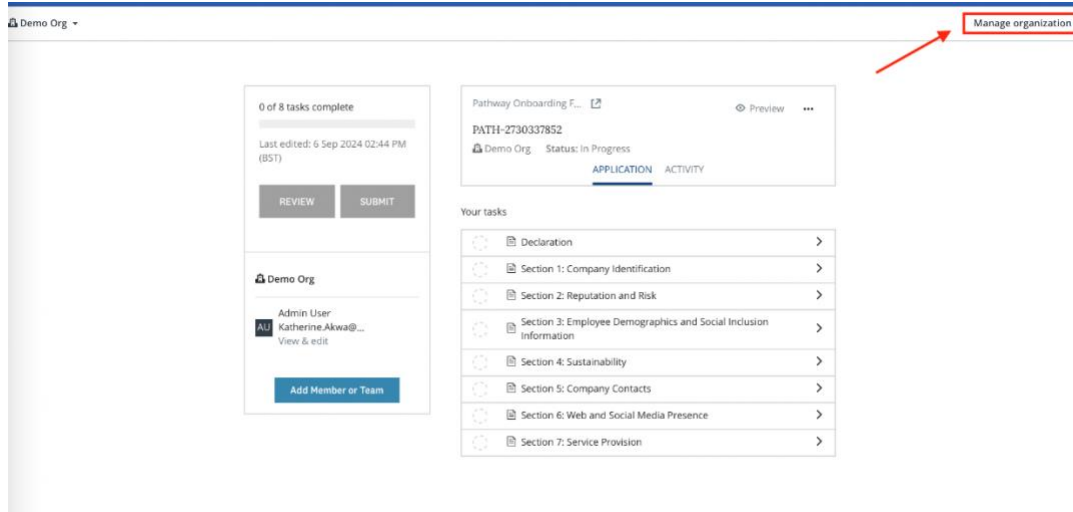
- Declaration
- Section 1: Company Identification
- Section 2: Reputation and Risk
- Section 3: Employee Demographics and Social Inclusion Information
- Section 4: Sustainability
- Section 5: Company Contacts
- Section 6: Web and Social Media Presence
- Section 7: Service Provision

In the process of filling out your application you may require additional support from other personnel in your company, please see “3. Manage Organizations – Members” on how to manage your organization within the portal.

3. Manage Organization – Members


a) Manage organization

In the top right corner, click **“Manage organization”**



You will be able to see the profile of your organization, where you can edit details such as the company name, address as well as your personal details.

Organization logo



Organization information

Organization name

Address

City Country

Organization phone number Organization email

Website

Primary organization administrator

First name Last name

Email

b) Add Member from organization

To add additional members to populate the Pathway Onboarding form, click “**Manage Organization**” > “**Members**” > “**Add Members**”.

Profile **Members** Teams

Add members [Import members...](#)

First name: Test Last name: Test

Email: (required) typsaumftzmmulcz@nbmbb.com

Role:
 Non-administrator
 Organization administrator

Add to team
Select...

Notify member by email that they have been added
 Include a custom message in the email

[CANCEL](#) [ADD](#)

If you chose the “**Notify member by email that they have been added**” option, they should receive a notification via e-mail that looks like this:



Dear John Smith ,

Mark Grigg has invited you to collaborate on their application, **PATH-4822557456**, for the following program, **Pathway Onboarding Form**.

Please click on the link below to accept the invitation to collaborate on this application.

Kind Regards

CREST Portal Team

[Join now](#)

The user will be prompted to repeat the following steps from “1. Creating an account with CREST Membership Portal”:

a) E-mail invitation

b) Create your user profile

c) E-mail confirmation

Register your organization
Register for your account below

Register with

G

OR

First name <input type="text" value="Test"/>	Last name <input type="text" value="Test"/>
--	---

Email

Password

Confirm password

By registering for an account, you agree to our [terms of service](#) and [privacy policy](#)

CREATE ACCOUNT

As primary Admin you will need to manually add user(s) to the forms you wish for them to complete, by going to the form and clicking “**Add Member**” then selecting the name of the member you would like to add.


0 of 8 tasks complete

Last edited: 6 Sep 2024 02:44 PM (BST)

REVIEW **SUBMIT**

Demo Org

Admin User
 AU Katherine.Akwa@...
 View & edit



Add Member or Team

Pathway Onboarding F... Preview ...

PATH-2730337852

Demo Org Status: In Progress

APPLICATION ACTIVITY

Your tasks

- Declaration >
- Section 1: Company Identification >
- Section 2: Reputation and Risk >
- Section 3: Employee Demographics and Social Inclusion Information >
- Section 4: Sustainability >
- Section 5: Company Contacts >
- Section 6: Web and Social Media Presence >
- Section 7: Service Provision >



Please note, that any **“Member”** can fill out the application form including those with **“non-administrator”** status but only **“organization administrators”** will be able to submit the form for final review.



c) Change Member status to **“Organization administrator”**


To change the status of a member, click **“Manage Organization”** > **“Members”** > then


Click  next to the name of the member whose status you want to change.

Profile **Members** Teams

0   [Add member](#)

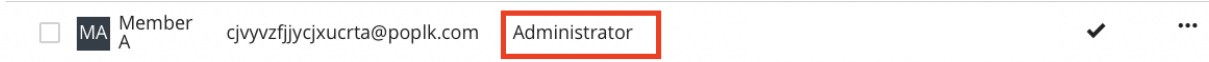
<input type="checkbox"/>	Name	Email	Role	Teams	Last login	Invited at	Signup date	Active
<input type="checkbox"/>	AU Admin User	bshfbvoixjpcnnsdosno@approved.org	Primary administrator		Yesterday			
<input type="checkbox"/>	MA Member A	cjvyzffjjycxucrta@poplk.com	Non-administrator					 ...

Page: 1 (1 - 2 of 2) 

You will be given the following options, select “Toggle role” to change their status.


- Email
- Change team membership
- Resend invite
- Toggle role**
- Activate
- Toggle site access
- Delete from organization

This change should be reflected accordingly:



d) Remove members from organization

To remove a member from your portal organization and all applications, click “**Manage**

Organization” > “**Members**” > then Click “” next to the name of the you want to remove then select “**Delete from organization**”

- Email
- Change team membership
- Resend invite
- Toggle role
- Activate
- Toggle site access
- Delete from organization**

We recommend having the following personnel from your organization help in filling out the forms:

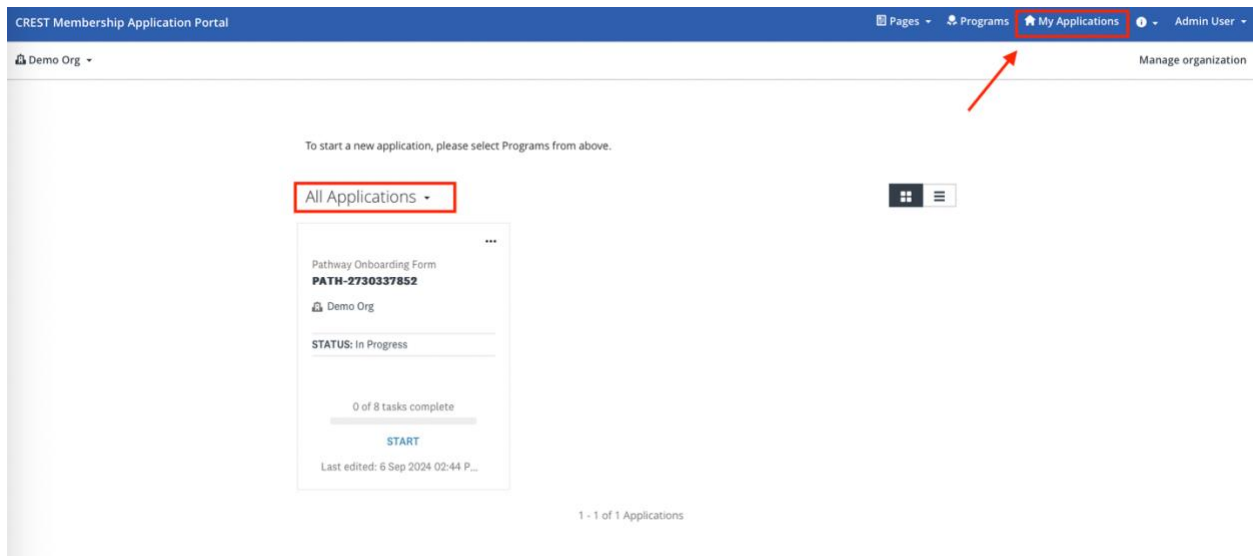
- Primary Administrator
- Secondary Administrator
- Accounts/Finance Member
- HR Member
- Governance / Legal Member

4. Complete an application

a) Filling out the application

Under “**All Applications**” your organization’s application form will be available to populate and submit.

If for any reason you cannot see the forms you are looking for then click “My Applications” and/or repeat all the steps in “**2. Logging in and navigating to your organization**” of this manual.



Select the appropriate application and click “**START**” to proceed.

You will see tasks within the application stage, please complete all sections in order, starting with the “**Declaration**”.

All sections within the application are mandatory.

0 of 8 tasks complete

Last edited: 6 Sep 2024 02:44 PM (BST)

REVIEW SUBMIT

Demo Org

Admin User
Katherine.Akwa@...
View & edit

Member A
cjyvvzfjjycxurta...
View & edit

Add Member or Team

Pathway Onboarding F... Preview ...

PATH-2730337852

Demo Org Status: In Progress

APPLICATION ACTIVITY

Your tasks

- Declaration
- Section 1: Company Identification
- Section 2: Reputation and Risk
- Section 3: Employee Demographics and Social Inclusion Information
- Section 4: Sustainability
- Section 5: Company Contacts
- Section 6: Web and Social Media Presence
- Section 7: Service Provision

Click the first section and fill in accordingly,

Use the **“SAVE & CONTINUE EDITING”** to avoid losing progress.

Use the **“MARK AS COMPLETED”** to save the section.











Please note, there is no “Next” button to navigate between “Sections” or “Tasks” of the form, only within a section. Instead, you will be required to manually select each section to proceed.

The image shows two parts of a web application interface. On the left is a sidebar menu for a 'Pathway Onboarding Form' with ID PATH-2730337852 and status 'In Progress'. The sidebar lists four sections: 'Declaration' (completed with a green tick), 'Section 1: Company Identification' (in progress with a half-filled circle), 'Section 2: Reputation and Risk' (pending with a dashed circle), 'Section 3: Employee Demographics and Social Inclusion Information' (pending with a dashed circle), and 'Section 4: Sustainability' (pending with a dashed circle). A progress bar at the bottom of the sidebar shows '1 of 8 tasks complete' with a small blue bar. Below the sidebar are 'REVIEW' and 'SUBMIT' buttons. On the right is the main content area for 'Section 1: Company Identification', which has a '50%' progress bar at the top. It contains questions G.6 through G.10 with various input fields like dropdown menus, radio buttons, and an 'Upload a file' button. At the bottom of this section are 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'NEXT' buttons.

You will be able to see the collective progress of the application and the individual progress of each section in the relevant status bars:

- Completed sections of the form will contain a green tick symbol
- In progress sections of the form will contain a half-filled circle symbol.

You can toggle between sections and have different members of the team filling out different sections simultaneously.

  Section 3: Employee Demographics and Social Inclusion Information
  Section 4: Sustainability
  Section 5: Company Contacts
  Section 6: Web and Social Media Presence
  Section 7: Service Provision



6 of 8 tasks complete


Last edited: 9 Sep 2024 02:05 AM (BST)

Please note, you can scroll to see all the relevant sections of the form.

Some questions will contain a drag and drop feature, where you will be asked to rank your choices from a pre-written list.

b) Editing a Section

  Section 7: Service Provision Completed 9 Sep 2024 02:12 AM (BST)	<div style="border: 2px solid red; padding: 2px; display: inline-block;">...</div>
<p>Section 7: Service Provision</p> <p>Purpose and Usage statement:</p> <p>To understand and evaluate the service offerings and target markets of our Pathway and Member companies, we require the following information. This will assist us in assessing the range of services you provide, your experience in these areas, and your primary industry focus, ensuring they align with our values and standards.</p> <ul style="list-style-type: none"> • Services Provided (S.1): We request information on the types of services your company currently provides. This information helps us understand the scope of your service offerings and your areas of expertise. • Years of Service Provision (S.1a): If your company provides specific services, we request information on how long your company has been providing each of these services. This helps us assess your experience and track record in each service area. • Service Provision Type (S.2): We request information on whether your company provides these services internally (to your own company or group of companies) or externally (to third-party companies). This helps us understand the context of your service provision. 	

To change or amend your answers on the form click “**Section**” > then Click “” next to the name of the Section you want to edit and select “**Edit**”.

Download

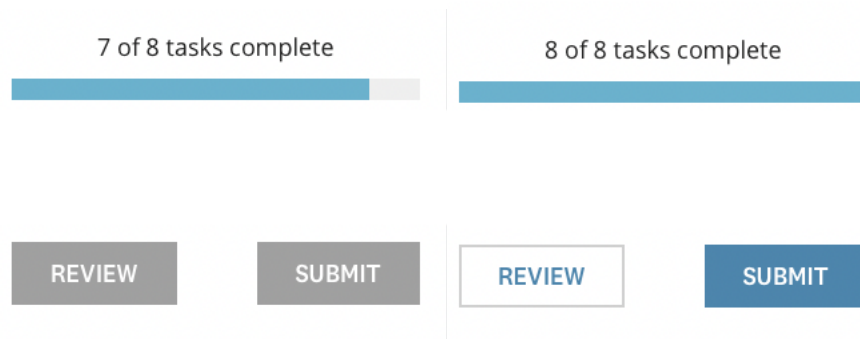
Reset

Edit

If you want to delete all answers given in a section, click “**Reset**” instead.


c) Submitting the Form

Once you have completed the all the relevant sections, your status bar will change and so will the color of the two options below it “**Review**” and “**Submit**”



Click “**Review**” to see the entirety of the form and all your answers in a scrolling view and once you have confirmed you are satisfied with the answers that you have provided and have filled out the application to the best of your ability and knowledge, click “**Submit**”.

Please note, once you submit your application you will no longer be able to go back and change your answers. Accordingly, you will be prompted a second time after clicking “**Submit**” whether you do in fact wish to submit the application.




Submit application

Please confirm submission of your application.

CANCELSUBMIT

Click “**Submit**” for a second and final time.



Application Submitted!

Thank you for submitting your Pathway Onboarding Form!

To continue your progress, please complete the following assessments:

- **Part 1: Company Self-Assessment:** This assessment helps us understand your organisation's general policies and procedures and identify areas for growth.
- **Part 2: Service Self-Assessments:** Depending on the specific services you provide, there will be one or more additional self-assessments to complete.

You can find these assessments under the **Programs** tab within the portal.

[Go to My Applications](#)

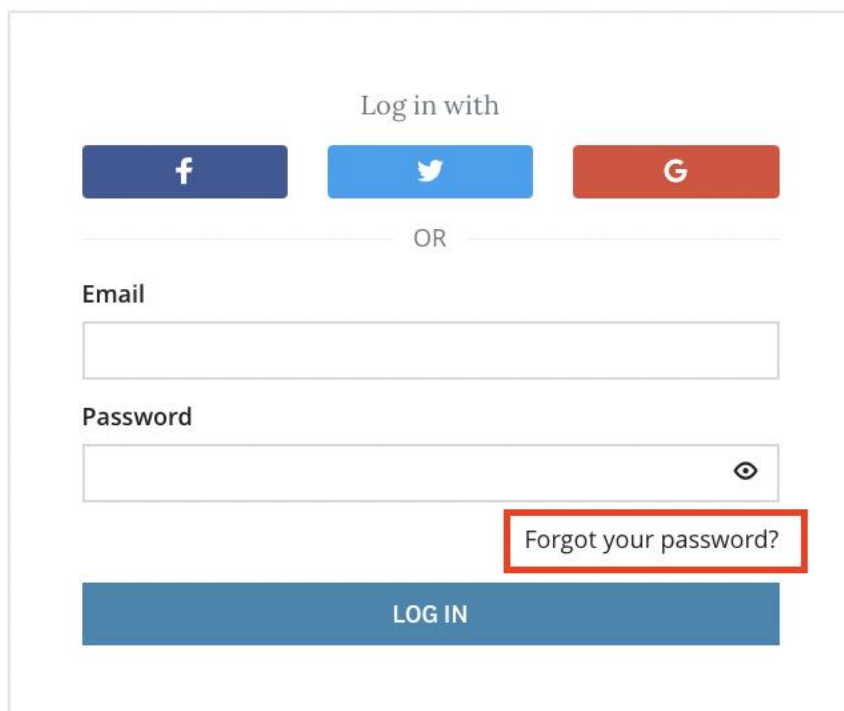
5. Troubleshooting

1. How do I find my password?

Unfortunately, for safety and security reasons we do not keep a record of your password. If you have forgotten it, you will need to reset it. Please follow the password reset instructions below.

2. How do I reset my password?

- Go to the SMAApply login page.
- Click on the "Forgot your password?" link.
- Enter the e-mail address associated with your account.
- Check your e-mail for the password reset link and follow the instructions to create a new password.



The screenshot shows the login interface for SMAApply. At the top, it says "Log in with" above three social media login buttons: Facebook (f), Twitter, and Google (G). Below these is an "OR" separator. There are two input fields: "Email" and "Password". The "Password" field has a toggle icon (an eye) to the right. Below the password field is a red-bordered link that says "Forgot your password?". At the bottom is a large blue button labeled "LOG IN".

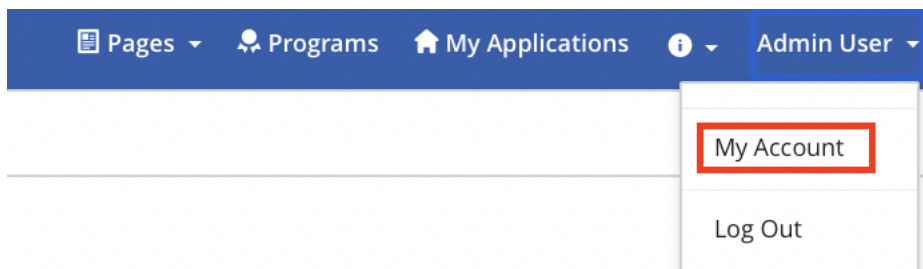
3. I have forgotten my username; how can I find this?

Your username is the e-mail address you used to create the account. Please check your e-mail inbox and spam folder for the welcome e-mail you received when registering if you cannot recall the specific e-mail account you used.

4. I have used the wrong e-mail address; can I change this?

Yes, you can change the e-mail address associated with your account:

1. Log into SMAApply using the incorrect e-mail.
2. In the top right corner of the portal, you should see your username.
3. Click on it then select "My Account" from the drop-down menu.
4. Update your e-mail address with the correct one.
5. Click "Save" to save changes.



5. I have already submitted my application; can I still edit this?

Unfortunately, once you have submitted the application you can no longer make amendments. If you feel that you have misrepresented your company during the process, please urgently reach out to crestcamp@crest-approved.org.