CONFICERT
Watching for transparency

CONFICERT Platform Guides

User Guide for Evaluation Staff – CONFICERT Web Platform

V1, 10.OCT.2026

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1. Purpose

The purpose of this guide is to describe how the CONFICERT web platform works for the evaluation staff of Certification Bodies. It details the procedures for accessing the private area and viewing profile information, the available payment methods, and the processes for purchasing and taking training courses and obtaining the corresponding completion certificate.

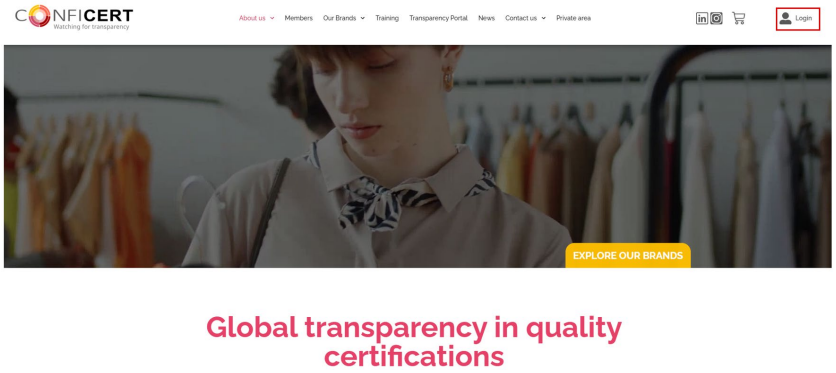
2. Private Area

The access credentials (username and password) of the evaluation staff are generated by the Certification Body from its own profile on the platform, in accordance with the procedure described in the **"User Guide for Certification Bodies – CONFICERT Web Platform".**

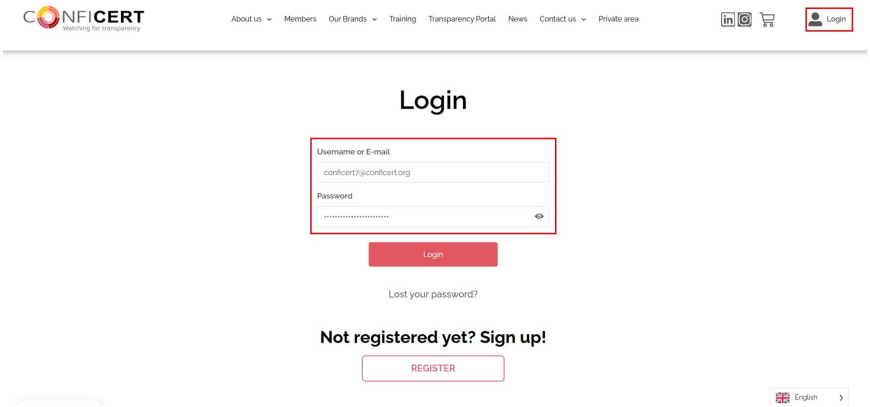
Once logged in, evaluation staff members access their private area, a personal space within the platform from which they can view their profile data and the courses in which they have been enrolled by their Certification Body.

- **Accessing the Platform**

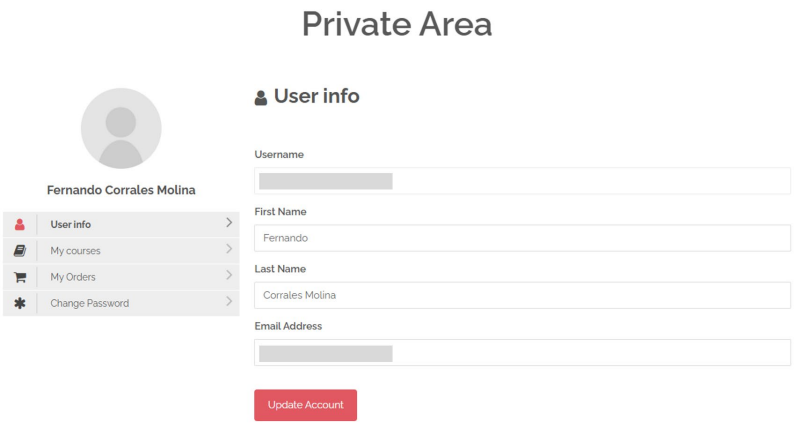
1) To access the platform, go to www.conficert.org and click the **"Login"** icon, located in the upper-right corner.



2) Next, enter the CONFICERT platform access credentials provided by the Certification Body.

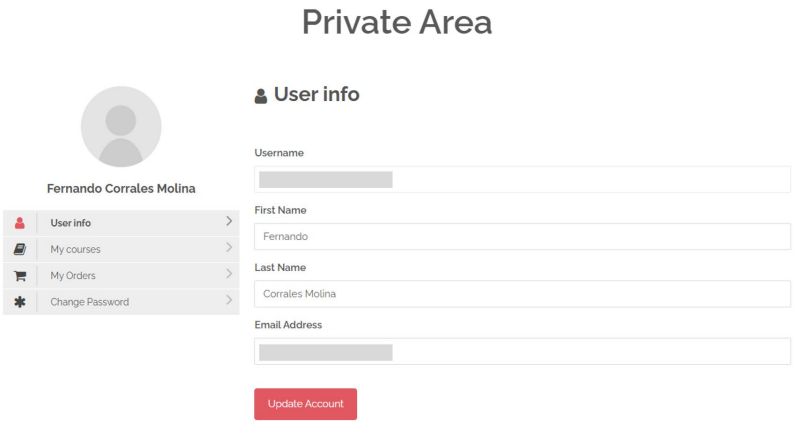


3) Once logged in, the user's private area is displayed.



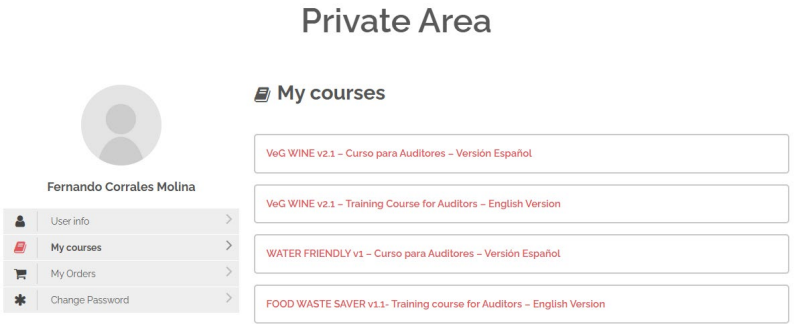
2.1. User Info

This section shows the basic account information: the username **("Username")**, which cannot be modified; the first name **("First Name")** and last name **("Last Name")**; and the email address associated with the account.



2.2. My courses

This section shows all the courses in which the evaluation staff member's profile is enrolled, both those assigned by their Certification Body and those purchased directly from their own profile.



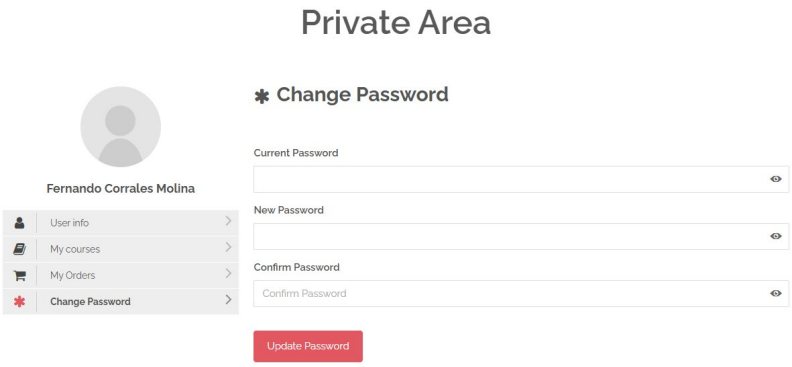
2.3. My Orders

This section shows all the orders placed along with their corresponding status. Orders with status "Completed" have their invoice available for download.

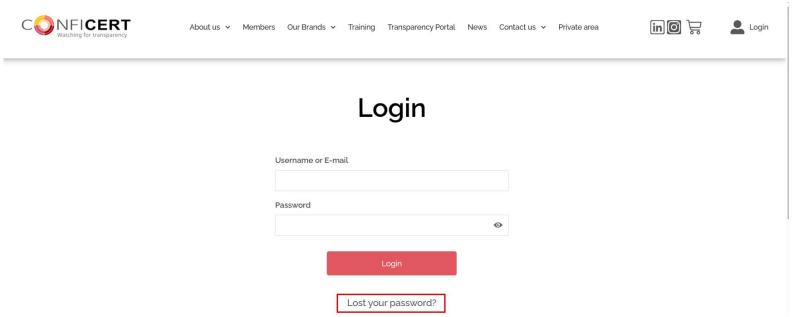


2.4. Change Password

From this section, the platform access password can be changed.



The password can also be reset from the login screen using the option **"Lost your password?",** located below the username and password fields.

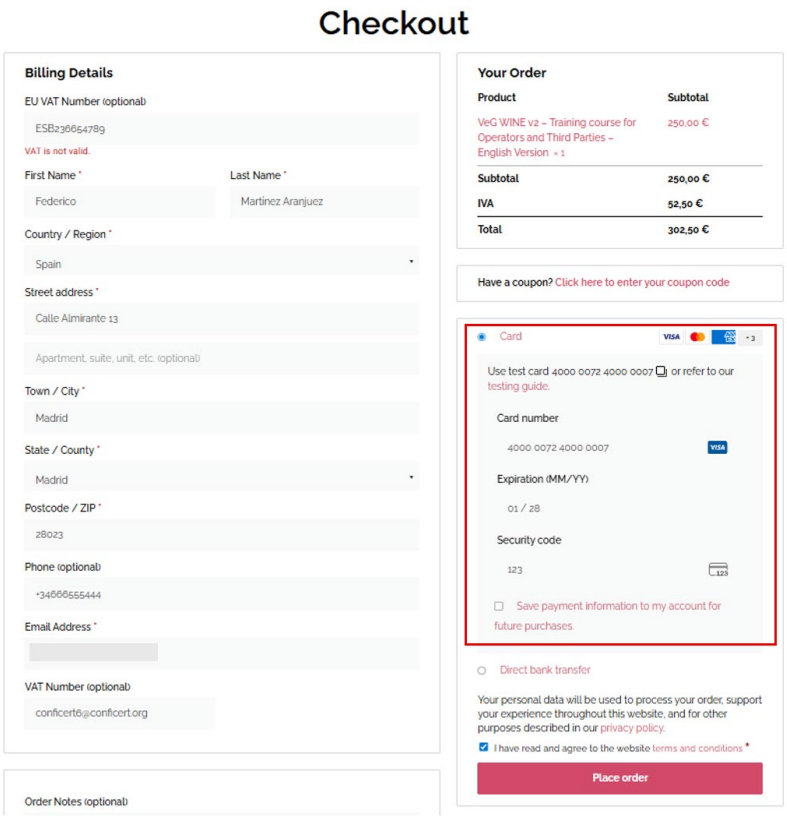


3. Payment Methods

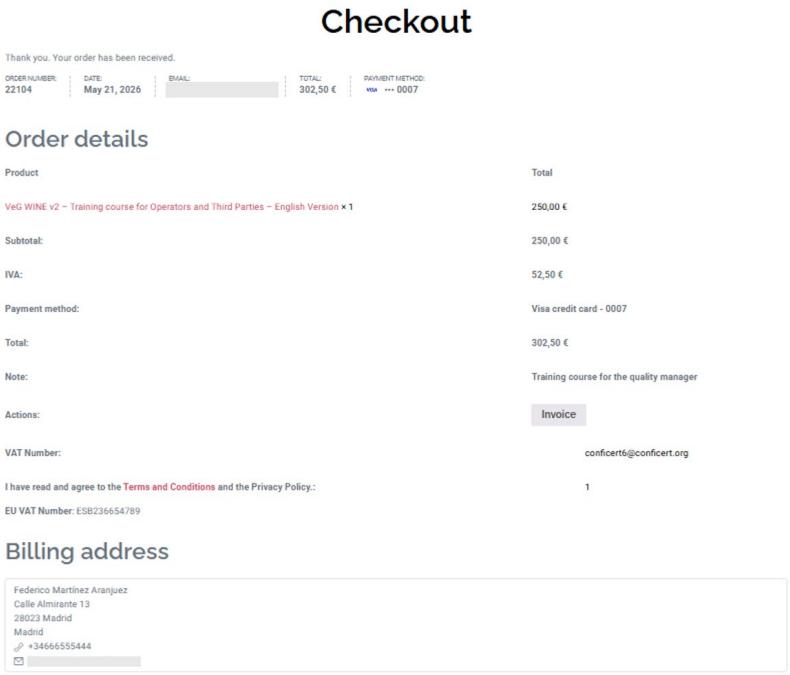
Courses are generally assigned and paid for directly by the Certification Body, so evaluation staff do not need to make any payment. However, if a course is purchased directly from the evaluation staff profile, two payment methods are available.

3.1. Payment by Bank Card

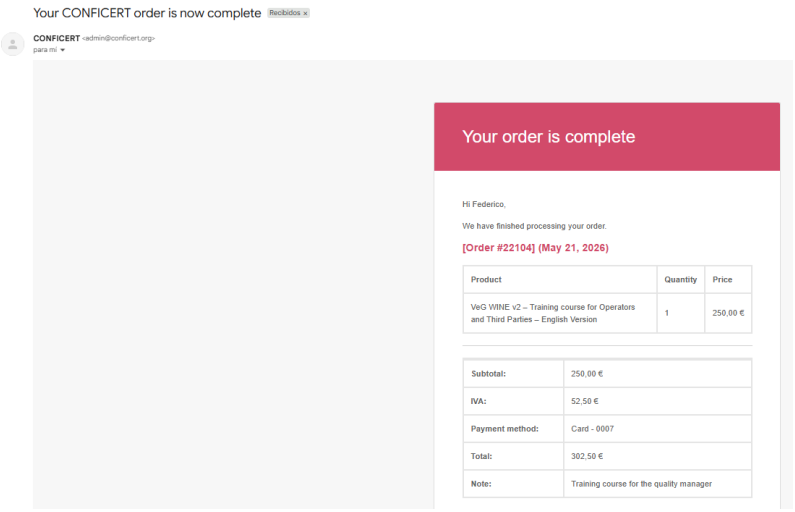
To pay by card, go to the **"Checkout"** and complete all the billing details. Then select the payment method **"Card"**, check both terms and conditions boxes, and click **"Place Order"**.



Once the payment has been processed, the order summary is displayed along with the billing details. Since this is a card payment, the system automatically records it as **completed**, so the invoice can be downloaded immediately by clicking **"Invoice"**.

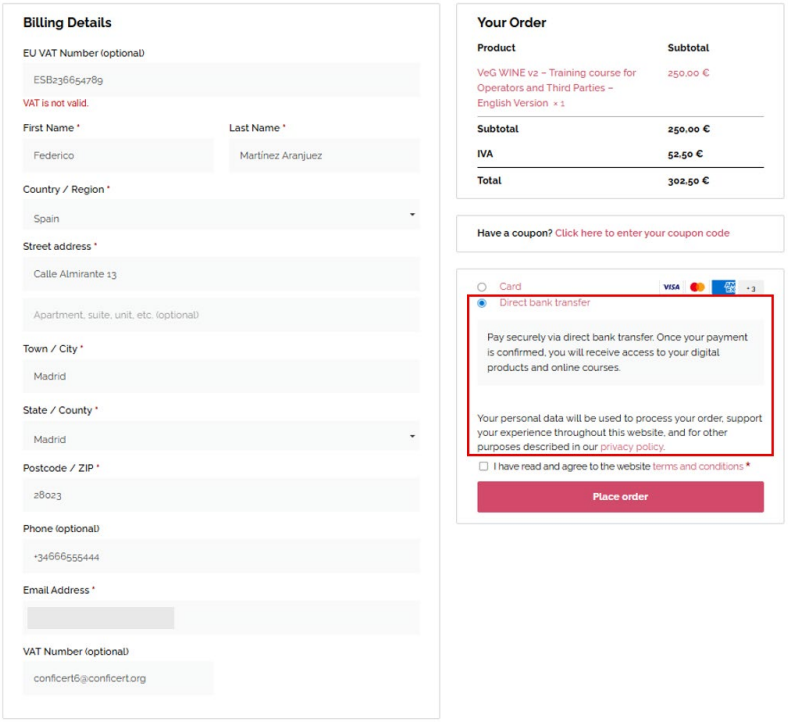


A confirmation email of the completed order will also be received, with the invoice attached.



3.2. Payment by Bank Transfer

To pay by bank transfer, go to the **"Checkout"** and complete all the billing details. Then select the payment method **"Direct Bank Transfer"**, check both terms and conditions boxes, and click **"Place Order"**.



The order summary will be displayed along with CONFICERT's bank details (bank name, IBAN, and BIC). When making the transfer, the order number must be entered as the reference in the description or message field of the banking app.

Please note that, since this is a bank transfer, the order will remain in **"On hold"** status until receipt of payment is confirmed. While the order remains in this status, the invoice will not be available.

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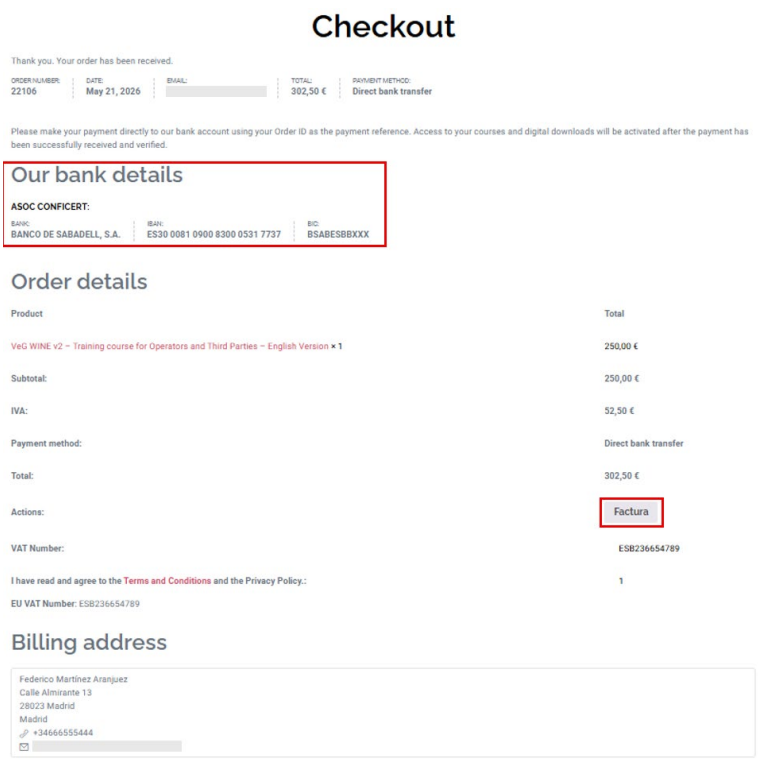
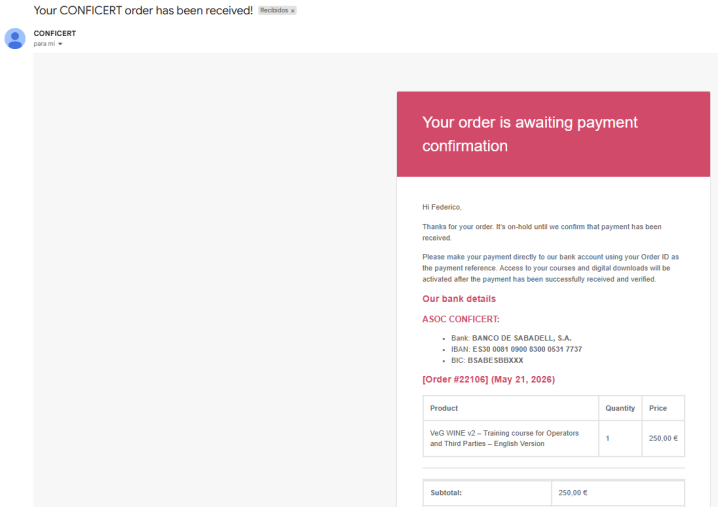
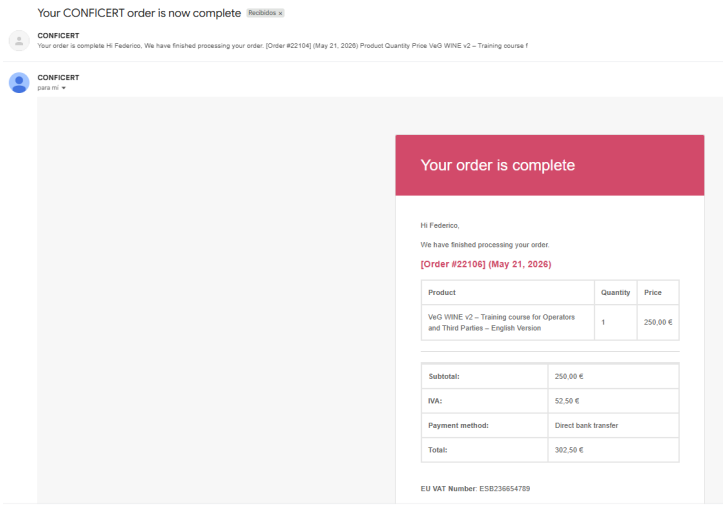


A confirmation email of receipt of the order will also be received, which includes the bank details for making the transfer and the instruction to use the order number as the payment reference.

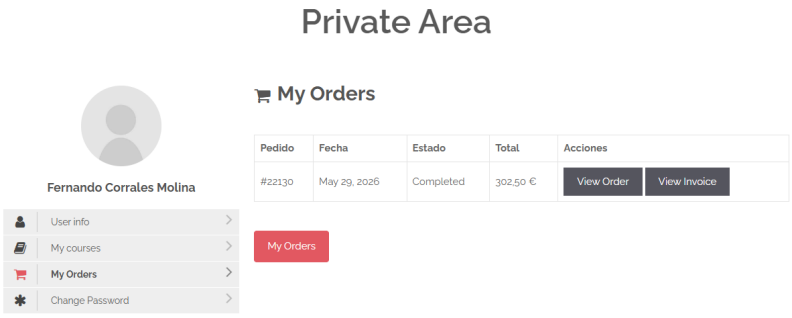


For the invoice to be issued, once the transfer has been made, an email must be sent to conficert5@conficert.org with the subject line **"INVOICE FOR PAYMENT OF ORDER NO. (order number)"**, attaching the proof of payment and billing details. Once this information has been received, the order status will be changed from **"On hold"** to **"Completed"**. Once updated, a confirmation email of the completed order will be received, with the invoice attached.



3.3. Order Management

In the **"My Orders"** section of the private area, the status of all orders placed is displayed. Orders with status **"Pending payment"** or **"On hold"** do not have an associated invoice. Only orders whose payment has been confirmed, and which therefore appear as **"Completed"** in the system, have their invoice available for download.



3.4. Changes, Refunds, and Cancellations

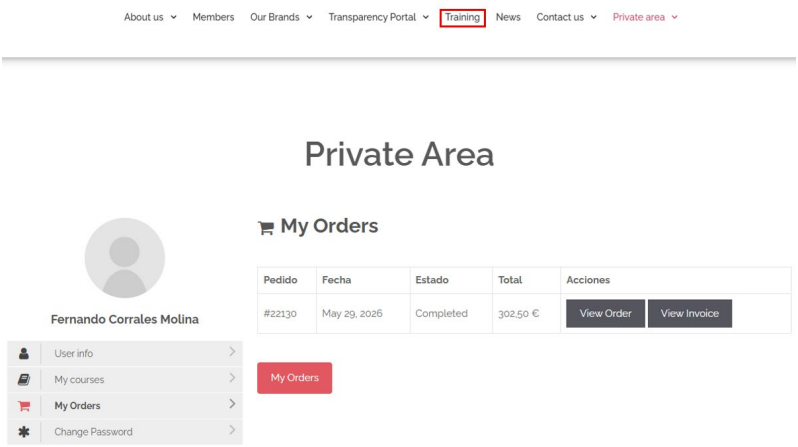
To request a change of payment method, a refund, or the cancellation of a purchase, an email must be sent to conficert5@conficert.org, where each case will be handled individually. Refunds and cancellations will be credited using the same payment method used for the original purchase.

4. Processes

4.1. Course Purchase

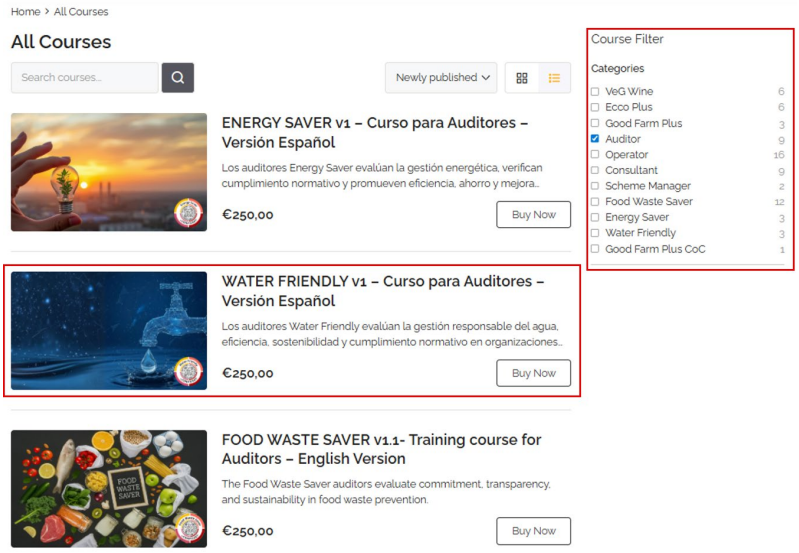
Courses are generally assigned by the Certification Body. However, evaluation staff may also purchase them on their own from their profile.

1) To purchase a course, go to the **"Training"** section of the main menu, located in the top bar of the screen.

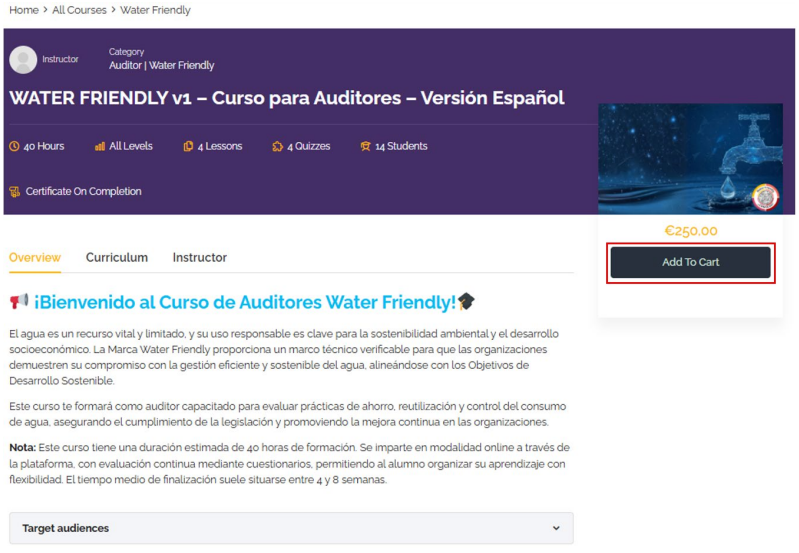


2) Next, find the course by browsing the catalog, filtering by category, or entering its name in the search box. Note that the auditor version of the course must always be selected.

3) Once located, select the course and click **"Buy Now"**.

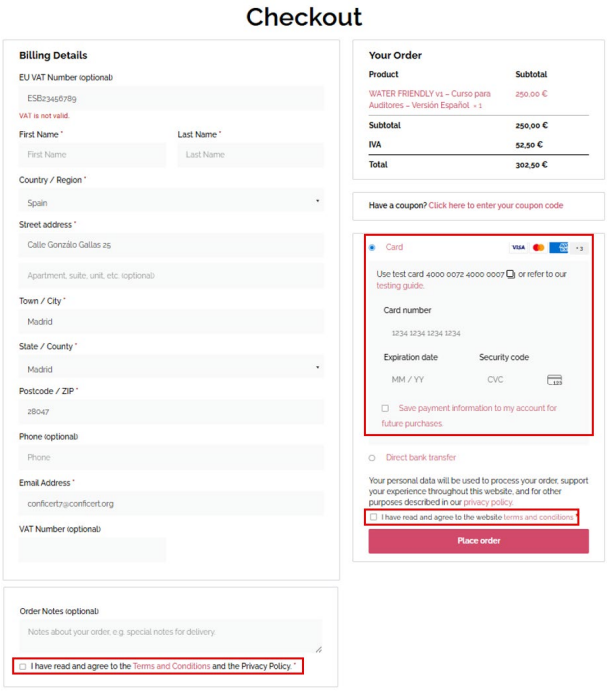


4) The course page will open. To add it to the cart, click **"Add to Cart"**.

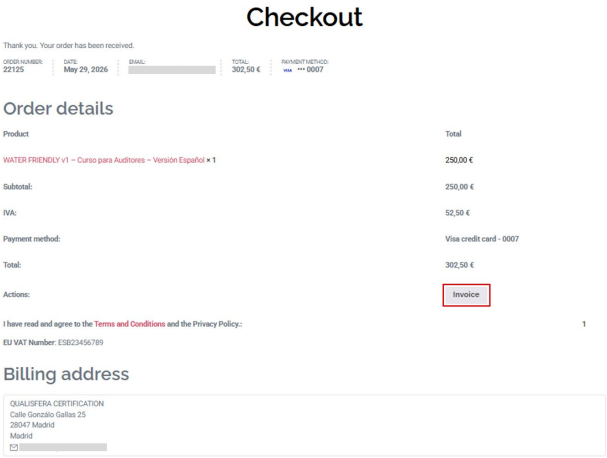


5) The system automatically redirects to the **"Checkout"**. To purchase other courses before completing the purchase, you can continue browsing and adding them to the cart; all of them will be included in the final order summary.

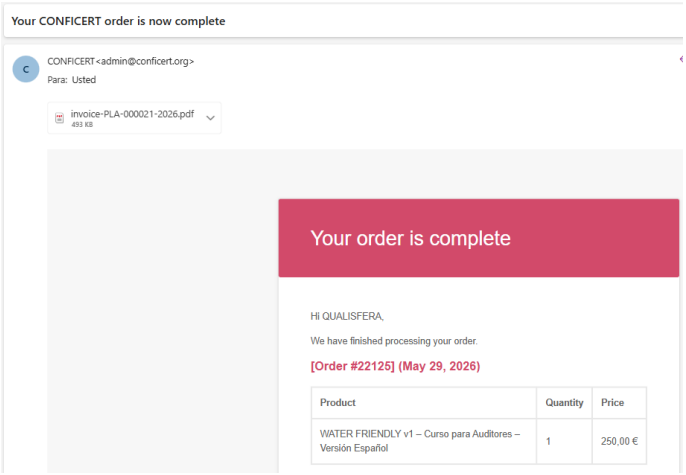
6) In the **"Checkout"**, complete all the billing details, accept the terms and conditions, and select the payment method. Optionally, a note can be added to the order. Once all the fields have been completed, click **"Place Order"**.



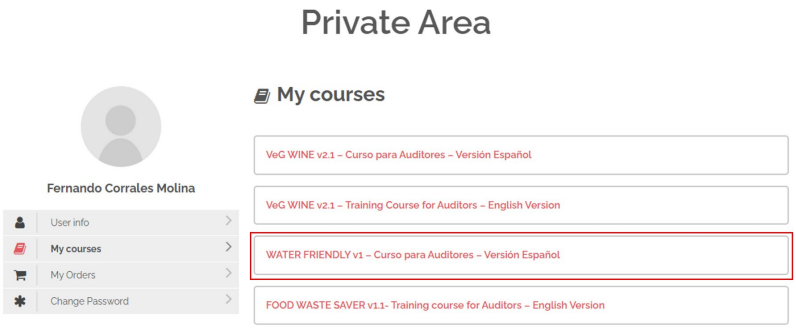
7) A purchase summary will be displayed with the order details and billing address. If payment was made by card, the order is automatically recorded as **"Completed"** and the invoice is available for immediate download. For bank transfer payments, follow the procedure described in section 3.2.



8) A confirmation email will also be received with the summary of the completed order and the invoice attached.



9) To verify that the purchase was successful, go to the **"My Courses"** section of the private area, where the purchased course will be shown.



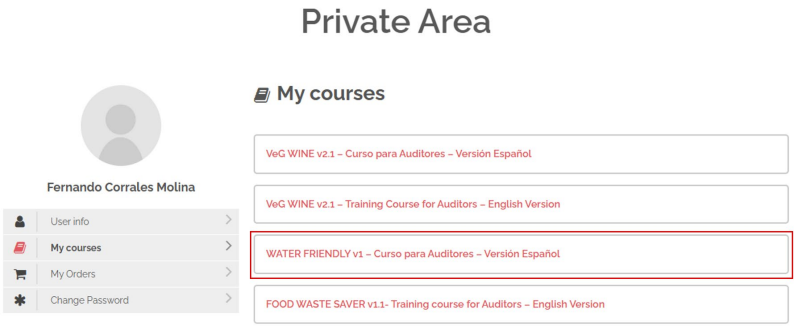
4.2. Taking Courses

Courses consist of three modules:

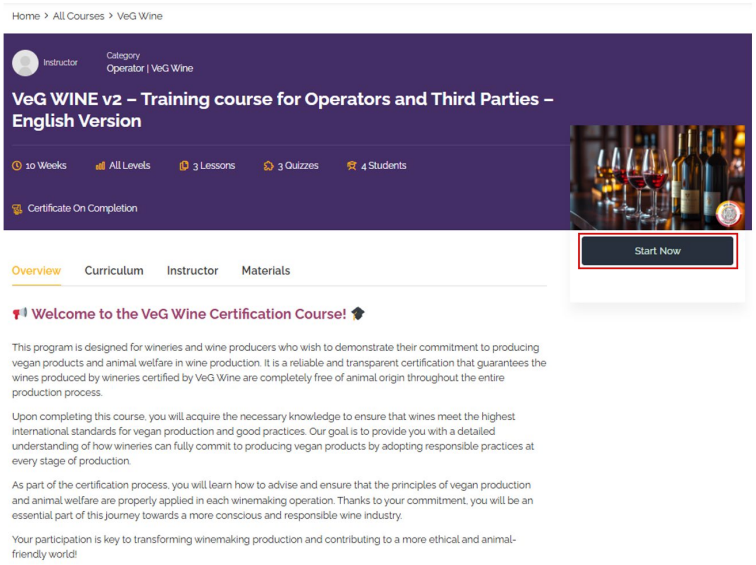
- the first, on the General Rules of the CONFICERT system;
- the second, specific to each brand and its standard;
- the third, on the evaluation of the brand's checklist requirements.

To pass each module, a minimum score of 75% must be obtained on the corresponding test.

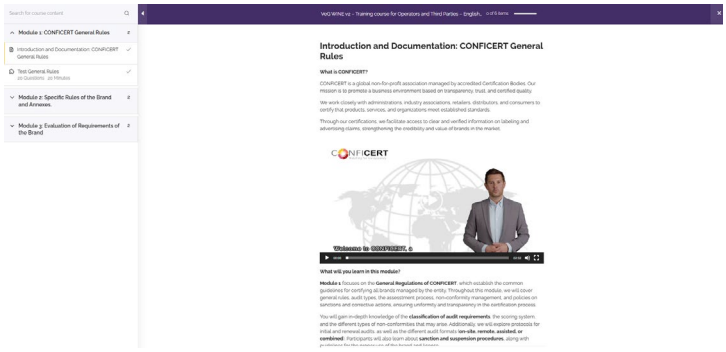
1) To take a course, go to the "My Courses" section of the private area and select the corresponding course. The course must have been previously purchased or assigned by the Certification Body.

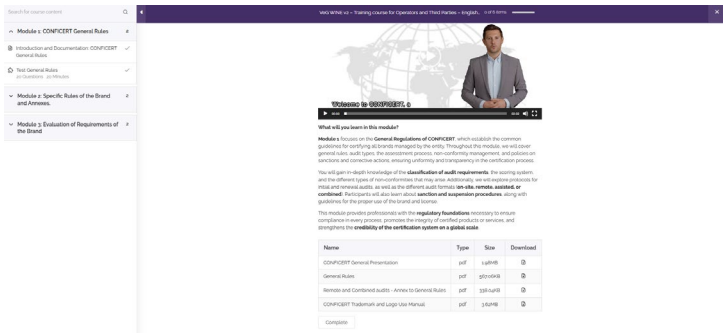


2) The course page will be displayed. To begin, click **"Start Now"**.

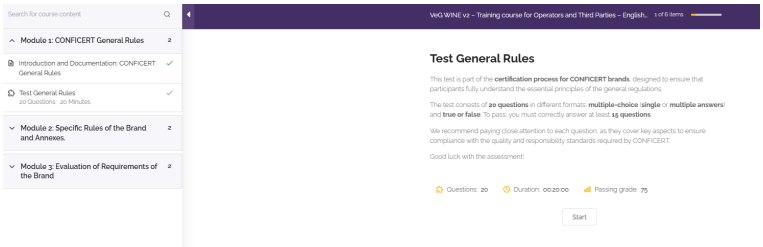


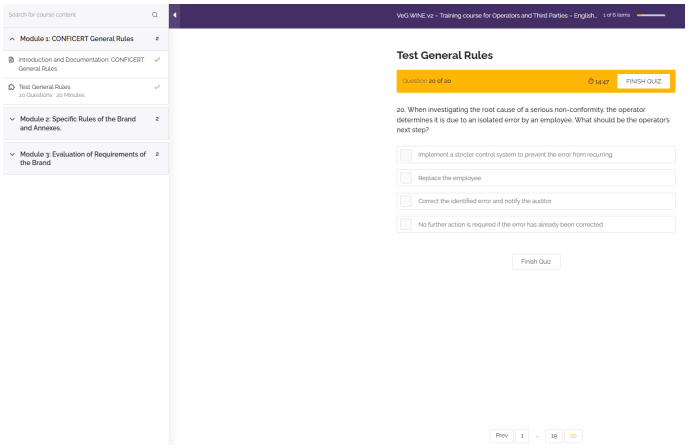
3) This opens **Module 1**. Scrolling down the screen, you will find the module content documents, which must be downloaded, read, and studied. Once they have been reviewed, click **"Complete"** to continue.



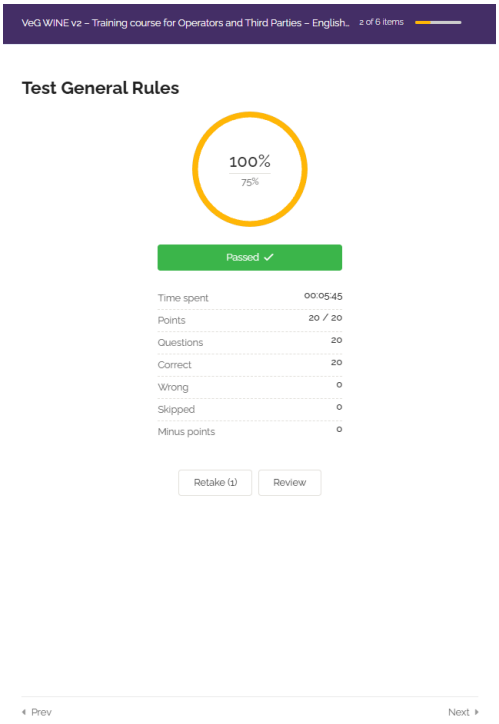


4) Next, access the test for Module 1, corresponding to the General Rules, which must be passed with a **minimum score of 75%.** The test includes multiple-choice questions (single-answer and multiple-answer) and true/false questions.

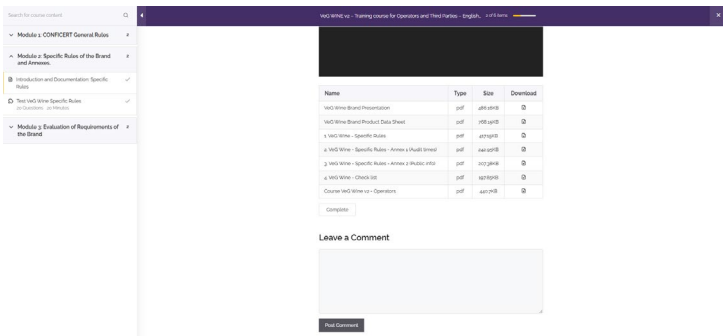


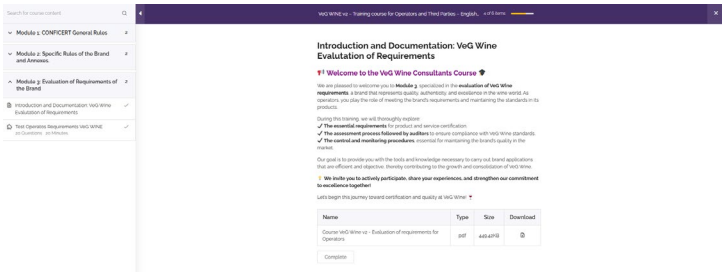


5) At the end of the test, a screen displays the result obtained. If any question has been answered incorrectly, it can be reviewed by clicking **"Review"**.

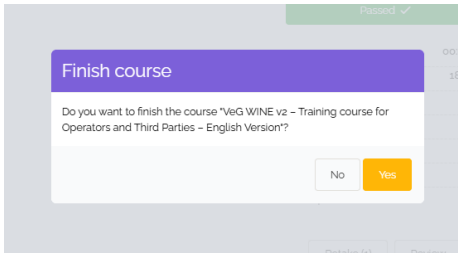


6) Repeat the same process for **Module 2** and **Module 3**.

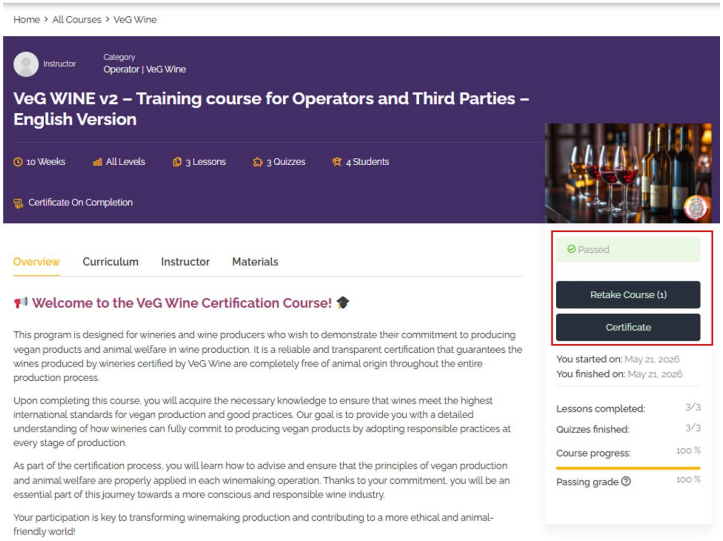




7) Once all the modules have been passed, the **"Finish Course"** window will be displayed. To finish the course, click **"Yes"**.



8) When returning to the course page, a summary is displayed with the following information: confirmation that the course has been passed, the number of attempts made, the option to retake it, and the **certificate download button**.



➢ **Note:** Once the course has been passed, the certificate must be downloaded and sent to the corresponding Certification Body.