

CERTIAPP Platform Guides

User Guide for Operators – CERTIAPP Platform

V1, 03.AUG.2026

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1. Purpose

The purpose of this document is to provide operators with a clear and practical guide for using the CERTIAPP platform, the tool through which the certification process under the CONFICERT scheme is managed.

This guide describes the main tools and functionalities available for the operator profile, as well as the steps to be followed throughout the certification process: from logging in and reviewing contact details, through signing the contract, registering facilities and technicians, completing the certification request, and resolving Non-Conformities, to obtaining the final certificate.

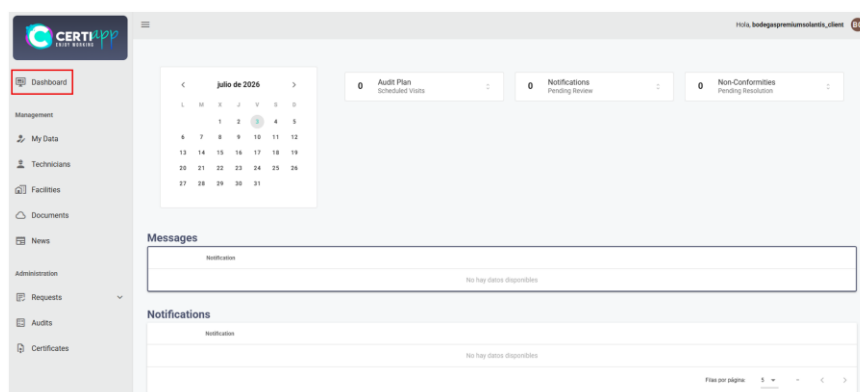
The aim is to enable operators to work independently within the platform, understanding the correct use of each section and thus facilitating smooth and efficient communication with the Certification Body (CB) throughout the entire process.

2. Tools

2.1. Dashboard

The dashboard tool displays a summary of the account's activity. It includes a calendar showing the planned and announced audits scheduled by the Certification Body (CB), the messages and notifications received, as well as a summary of:

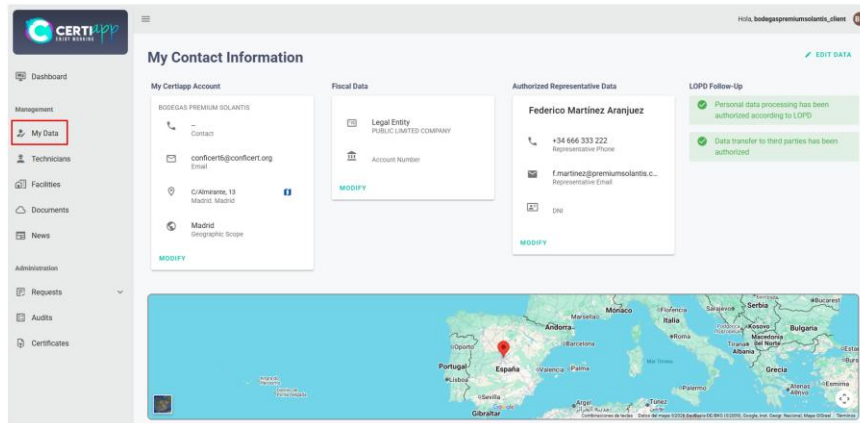
- The Audit Plans, which must be received at least 48 hours before the audit date.
- Notifications pending review.
- Non-Conformities pending resolution (which are generated upon receiving the Non-Conformity pack after the audit is closed).



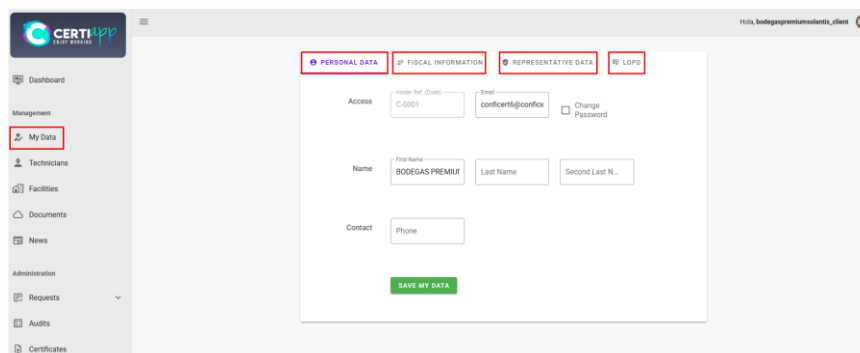
2.2. Management

2.2.1. My Data

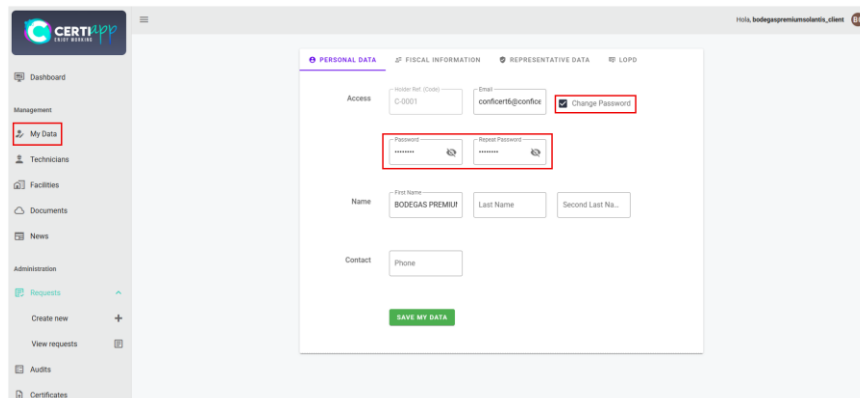
This section displays a summary of the operator's contact information. It includes an overview of the account, the tax data, the details of the person declared as authorized representative, and acceptance of the Organic Law on Data Protection (LOPD). These data are loaded beforehand by the Certification Body when creating and registering the operator client's account.



To modify any of these fields, click on “Modify”. A window will open with the four sections mentioned, where the necessary information can be edited.



For example, in the “Personal Data” field, the account password can be changed by clicking on the “Change Password” box, where the new password must be entered and repeated to confirm it. **The email address with which the account was registered must not be changed.** Once the changes have been made, click on “Save My Data”.



Likewise, the information in the “Fiscal Information”, “Representative Data”, and “LOPD” sections can be updated.

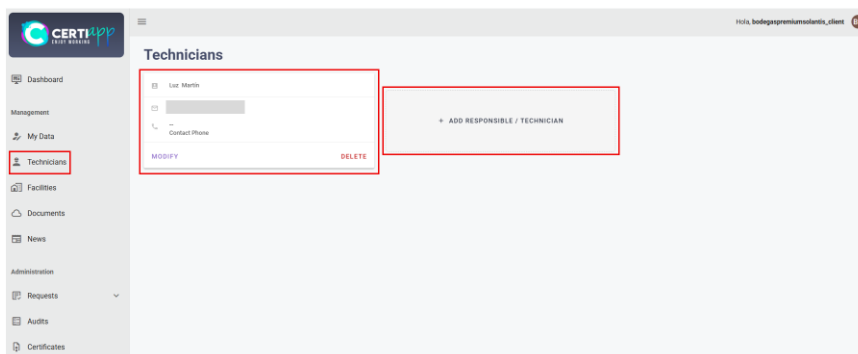
In the “LOPD” section, both fields will initially appear unchecked. The operator must check them by clicking on the corresponding box in order to give consent regarding the Organic Law on Data Protection. After checking them, save the changes by clicking on “Save My Data” and notify the Certification Body that consent has been given. **This step must be completed before the certification request is opened.**

Any change made in this section must be communicated to the CB with which the certification process is being carried out.

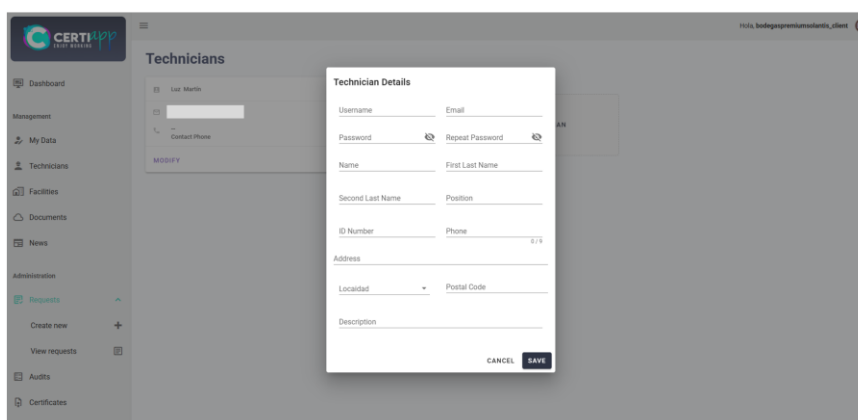
2.2.2. Technicians

In this section, all technicians relevant to the certification process can be added, such as the quality manager. This section works only as a record to identify the technicians or persons in charge linked to the process, and its use is **voluntary**, not mandatory.

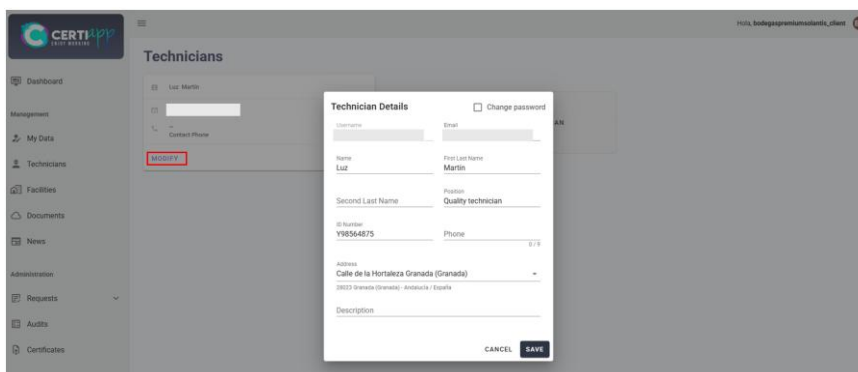
To add a new technician, click on the “Add Responsible/Technician” button.



A box will open in which the requested data must be completed. Although the username and password assignment is shown as a mandatory field, any value can be entered, since no access profiles will be generated for these technicians; this section is only an informational record and is not mandatory. Once all fields have been completed, click on “Save” to save the data.



To modify a technician's data, click on “Modify”, edit the necessary information, and save the changes by clicking on “Save”.



2.2.3. Facilities

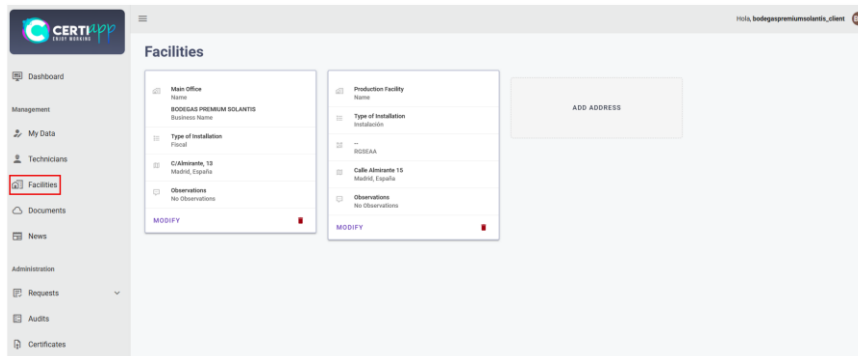
This section displays all the facilities declared within the certification process, such as the head office and the facilities that will be audited during the process.

There must be a **minimum of 2 addresses**: one set as the main address, of the fiscal type, and another of the facility type. If the head office address and the facility address are the same, two records must still be created: one of the office (fiscal) type and another of the facility type. **There must always be at least two facilities.**

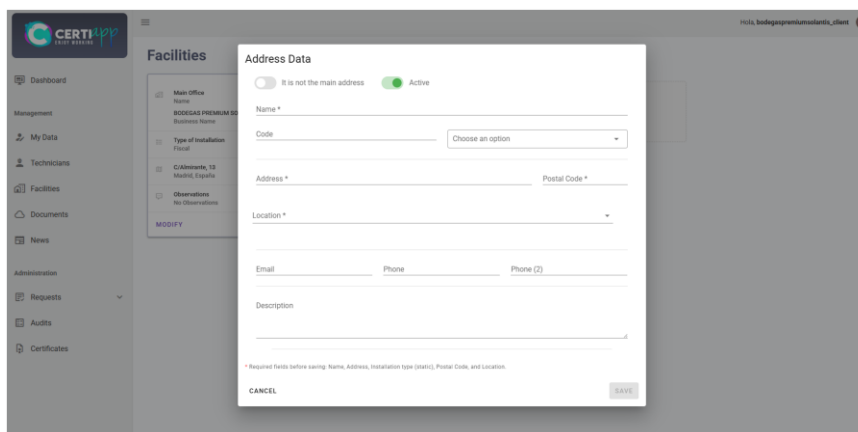
- **Single-site individual operators:** minimum of 2 facilities (one of the fiscal type for the head office and another of the facility type).

- **Multi-site operators or groups of operators:** minimum of 3 facilities (1 of the fiscal type and 2 of the facility type), since in this case there is more than one site to be audited.

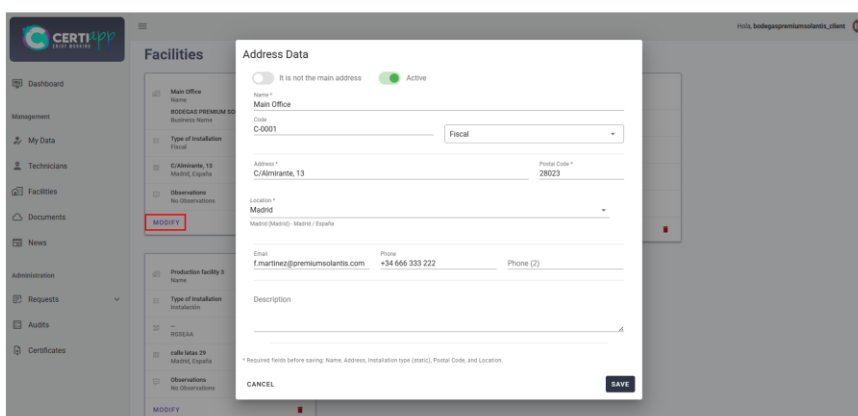
To create a new facility, click on “Add Address”.



Complete the requested data in the corresponding fields and indicate that the address is currently active. To save the information, click on “Save”.



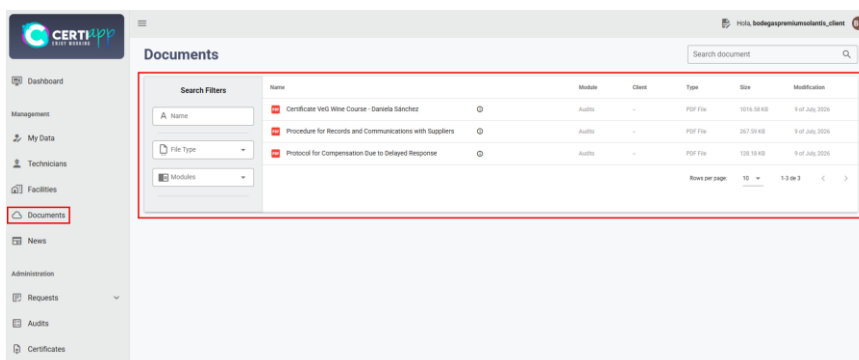
The Certification Body (CB) may have previously completed the data for the facilities (fiscal or facility type) declared beforehand. In that case, these sites will already appear registered on the platform; to modify the information of any of them, click on “Modify” on the corresponding facility.



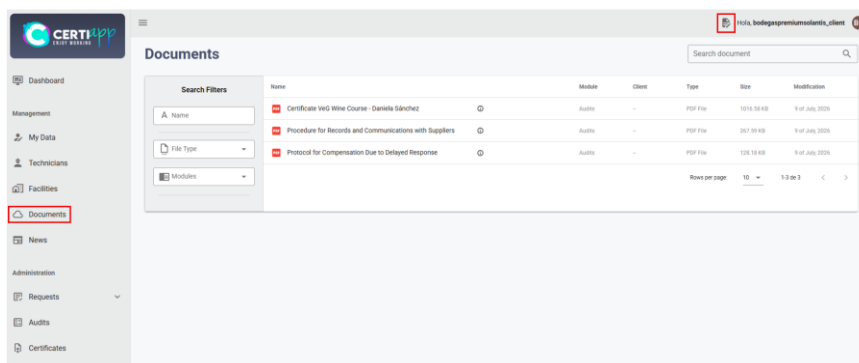
The modification or addition of new facilities must be carried out **before** submitting the certification request; this step is essential. Any change made must be notified to the CB with which the certification process is being carried out.

2.2.4. Documents

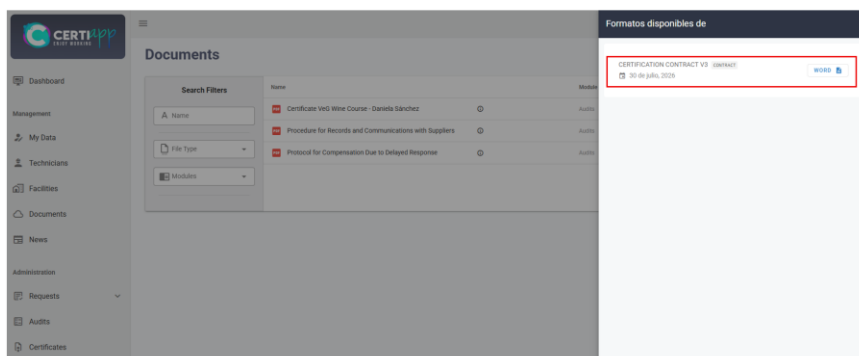
This section contains all the documents exchanged through CERTIAPP, such as the certification request and the evidence uploaded by the operator to resolve the Non-Conformities detected during the audit. These documents can be filtered by name, type, or module.



From this same section, the certification contract can also be downloaded and signed; it must be signed prior to the request. To access it, click on the “” icon located in the upper right corner of the screen, available only within the “Documents” section.

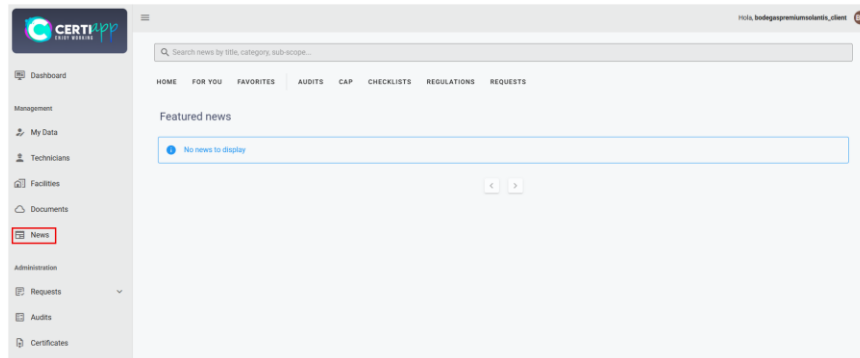


Clicking on the icon will display a box with the certification contract. To download it (it is downloaded in Word format), click on the “Word” icon. Check that the operator's information appears correctly in the corresponding fields. Once it has been confirmed that everything is correct, the contract must be signed and sent, signed, to the indicated CB email address for filing and validation.



2.2.5. News

This section displays the news and announcements that CONFICERT shares with operators.



2.3. Administration

2.3.1. Request

- **Create new**

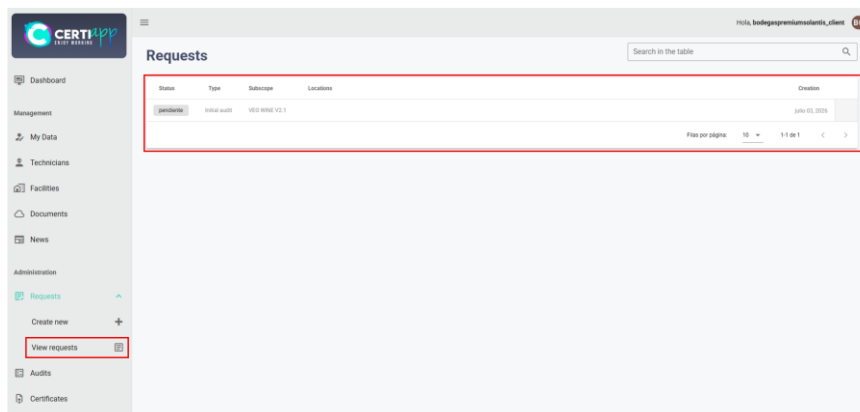
This section is where the certification request is created. The request will always be created by the Certification Body (CB); the operator's task is to complete it.

- **View request**

This section displays the certification requests opened by the CB. Here, the status, type, and scope of each request can be viewed globally.

If the status appears as **"Pending"**, the request can still be edited. If it appears as **"Approved"**, it can no longer be modified, as this indicates that the CB has verified and approved the information and that the process is closed, shortly before the creation of the audit plan.

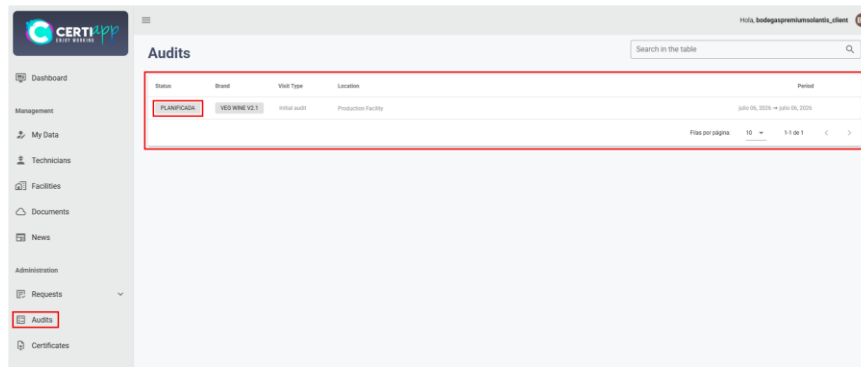
To edit or review a request, click on it. The entire request and its information must be completed in English. The procedure for completing the request is explained in section 3.6. Request.



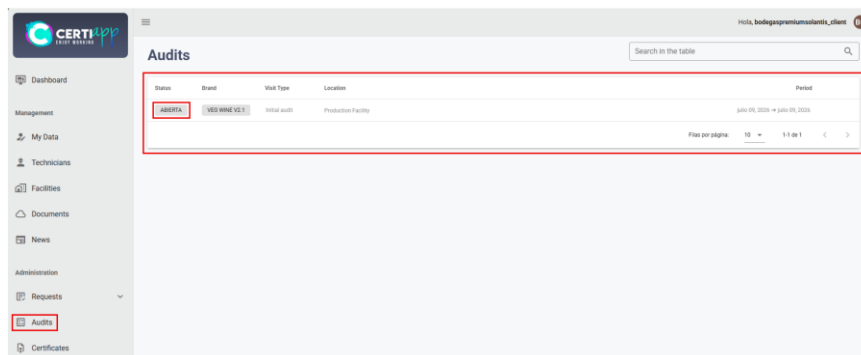
2.3.2. Audits

The audits tool displays audits with **Planned**, **Open**, or **Closed** status:

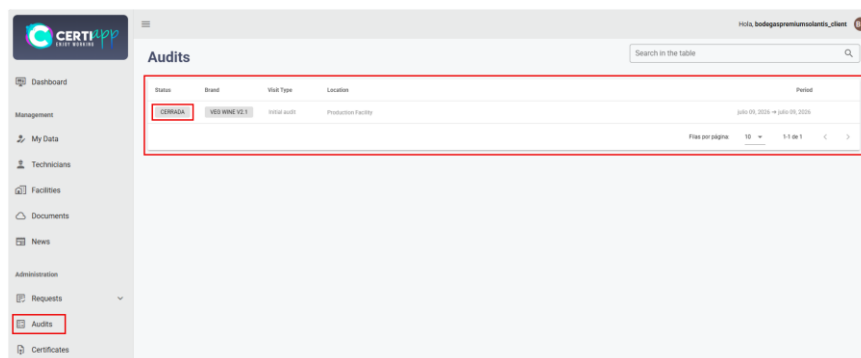
- **Planned:** the Scheme Manager has scheduled the audit, which will remain in this status until the corresponding auditor starts the process.



- **Open:** the assigned auditor has started the audit. After carrying it out, the auditor will send a Non-Conformity (NC) pack, which must be resolved within this same section. The auditor will send this pack only when the NCs are minor or serious, since in the case of a critical (K.O.) NC (non-compliance with a Level C in an essential requirement), the audit will be considered K.O.: it may be completed on the audit day, but the certification process cannot continue, in accordance with the General Rules.



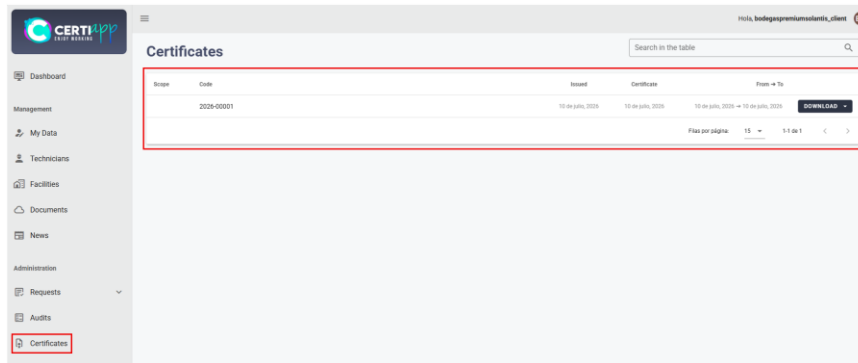
- **Closed:** once the NCs have been resolved and their resolution communicated to the auditor, the auditor will review and evaluate them and close the audit, which will thus move to Closed status. At that point, the auditor will send their ratings together with the audit report.



The procedure for resolving NCs within the CERTIAPP system is explained in section **3.7. Resolving Non-Conformities**.

2.3.3. Certificates

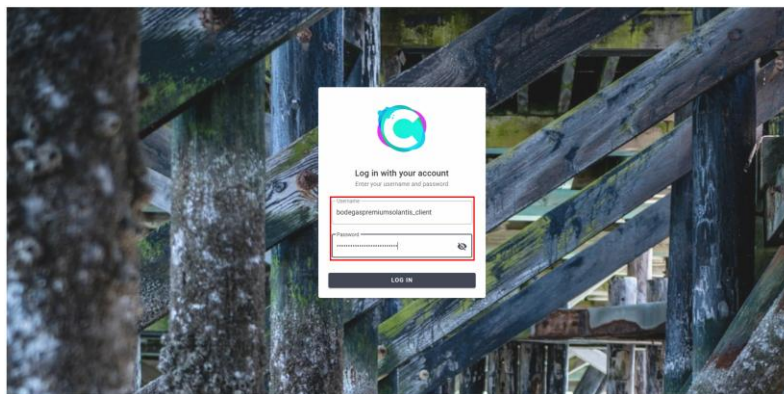
This section contains all the certificates obtained, available for download using the **“Download”** button.



3. Process

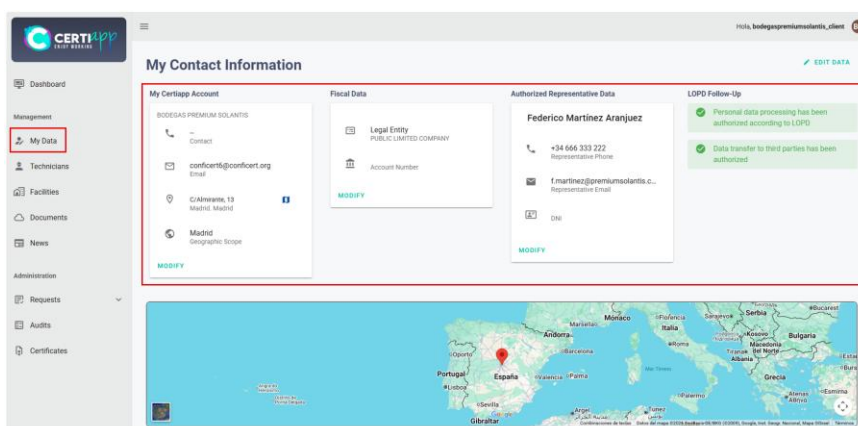
3.1. Login

Log in with the username and password provided by the Certification Body (CB) with which the service has been contracted.



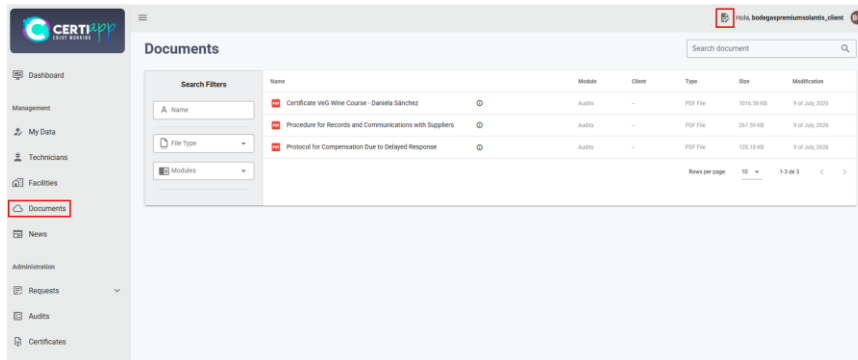
3.2. Contact Information Review

Verify that all the data entered by the CB in the profile ("My Data") are correct. If any data item needs to be edited, notify the CB. The procedure for reviewing and modifying this section is explained in point 2.2.1. **My Data**.



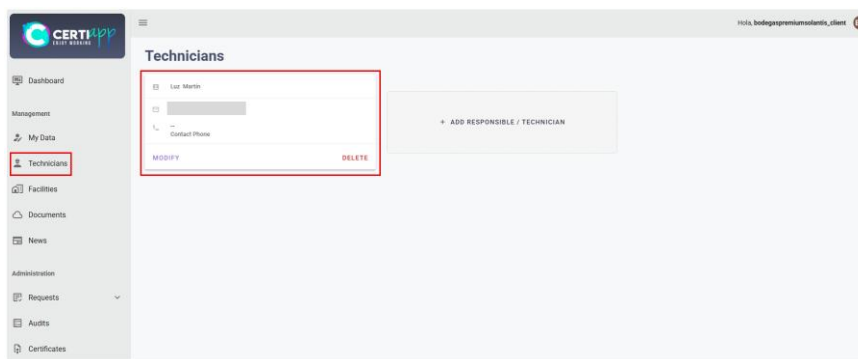
3.3. Contract Signing

Once the data have been confirmed, proceed to sign the contract. To locate it, click on the "Documents" tool, where a "📄" icon is shown in the upper right corner of the screen. Follow the steps indicated in section 2.2.4. **Documents** to complete the signing.



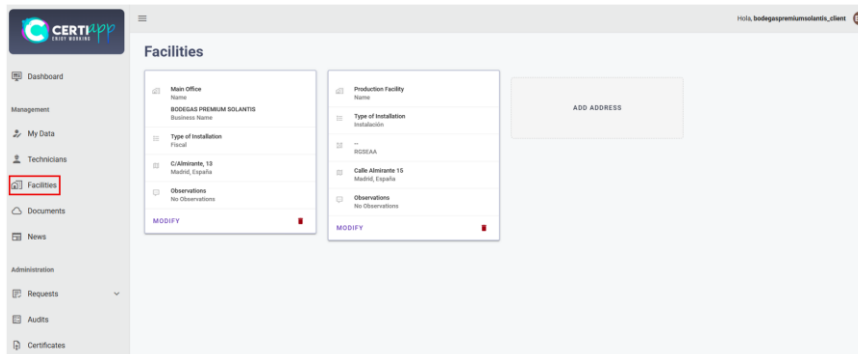
3.4. Technician Registration

On a voluntary (not mandatory) basis, the information of the technicians involved in the certification process can be entered. The procedure for adding or editing technicians and persons in charge is explained in section **2.2.2. Technicians**.



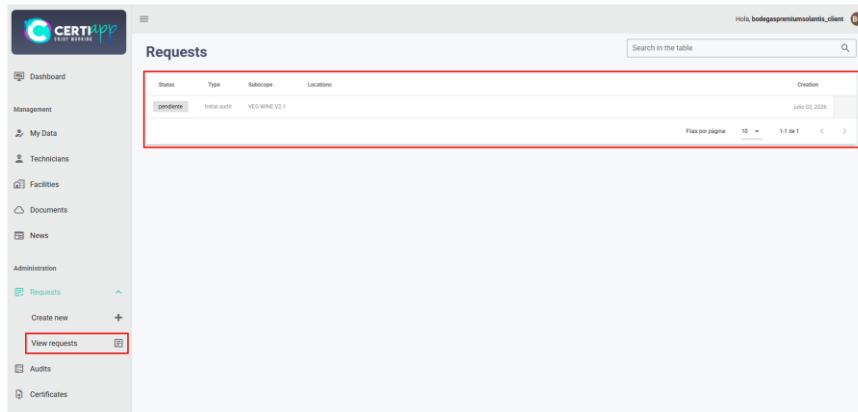
3.5. Facility Registration

All facilities to be audited must be added in the "Facilities" section, as explained in point **2.2.3. Facilities**. Special attention must be paid to declaring all facilities, since otherwise problems may arise when completing the request.



3.6. Request

The CB will open a request that must be completed from the "View Request" section. To be able to edit it, its status must be shown as "Pending". To access it, click on the corresponding request and complete it section by section.



3.6.1. "Consulting" Section

Complete the "Consulting" section by answering the corresponding questions.

3.6.2. Previous Certificate and CONFICERT ID Number Section

Complete this section by indicating whether any previous certification is held, whether from CONFICERT or not, and fill in the corresponding fields.

3.6.3. Declarations Section

Complete the "Declarations" section, answering as appropriate.

3.6.4. Brand's Specific Information Section

This section requires special attention, since the data entered here are what define the audit plan.

1) "Operator Description" Table

In question 1, on operator type, indicate whether the operator is an Individual Operator (single site), Multi-site, or Group of Operators. Depending on the type selected, complete the corresponding questions:

- **Individual operator (single site):** only question 1 is completed. The remaining boxes must be left empty since, as it is a single site, there will only be one location to be audited.

- **Multi-site operator:** questions 1 and 2 are completed, indicating in question 2 the "Number of locations/operating units under the certification scope". The other two boxes must not be completed.

- **Group of Operators:** the user with which the profile was created will be considered the "Lead Operator", who will manage the entire certification process. Questions 1, 3, and 4 are completed:
 - ✓ In question 3, indicate the total number of operators in the group, including the lead operator (for example, if there are 2, this means the lead operator plus one additional operator).
 - ✓ In question 4, indicate the "Number of locations/operating units under the certification scope", corresponding to the total sum of the sites declared by all operators in the group. For example, if the lead operator (Operator 1) has 2 operating units and the second operator (Operator 2) has 1 operating unit, the total to be entered will be 3.

2) "Requested Information of the Brand" Table

This table requires full attention, since the information entered defines the audit plan. Data are added by rows; to add a new row, click on the "+" icon.

A pop-up window will open with the questions corresponding to this section. The questions common to all Brands are:

- **Operator number:** completed according to the corresponding order (OPERATOR 1, OPERATOR 2, OPERATOR 3, etc., always in capital letters).

- **Site number:** completed according to the order of the site in question (SITE 1, SITE 2, SITE 3, etc., always in capital letters).
- **Location:** select the location assigned to this specific operator and site. It is essential to have correctly registered all locations to be audited in point 2.2.3. Facilities; they must be of the "Facility" type in order to be available in this section of the request.

This box is completed differently depending on the type of operator:

A. For an individual operator — single site:

- 1) Add a row with the "+" icon.
- 2) In "Operator number", enter "**OPERATOR 1**" and in "Site number", "**SITE 1**" (both in capital letters).
- 3) In "Location", select the location assigned to this site, complete the address and contact person and, since it is the only site to be audited, enter "**Main Location**".
- 4) The remaining questions on production or work details vary depending on the Brand to be certified. Once the information is complete, click on "**Save**".

Once saved, the information will be shown in a single row in the table.

B. For a multi-site individual operator:

As it is a single operator with more than one site to be audited, the "Number of Operator" field remains "OPERATOR 1" in all rows, and what varies is the "Number of Site".

- 1) For the **first site**, proceed as in the previous case: "Number of Operator" = "OPERATOR 1", "Number of Site" = "SITE 1" (Site 1 must always be the main location, or "Main Location").
- 2) Complete "Location", the address, and the contact person.
- 3) Complete the remaining questions on production or work details.
- 4) Save with "Save".

- 5) To add the **second site**, create a new row.
- 6) Keep "Number of Operator" = "OPERATOR 1" and change "Number of Site" to "SITE 2".
- 7) Select the corresponding location (for example, "Production Facility 2").
- 8) Add the address and contact person for this site and, in the question on approximate distance to the main location/site, enter the distance between the two points (Site 1 is always the main site and always belongs to Operator 1).
- 9) The remaining questions relate to production or work and vary depending on the Brand.
- 10) Repeat this process for each additional site declared by the operator.

Attention: in the last question, "*Does anyone in the company have the official Brand course completed?*", if it has already been answered for Site 1, it does not need to be answered again, since the certificate of completion of the Brand training course is per operator, not per site. In that case, enter "-".

- 11) Click on "Save" to save.

When finished, the table will show two rows corresponding to the same operator (OPERATOR 1) with its two sites (SITE 1 and SITE 2).

Number of ..	Num...	1. Lo..	Location	Enter the compl..	Contact Pe..	Approxima..	2. Pro..	Lio...
OPERATOR 1	SITE 1		Production Facility	Calle Alcanadre 15, 2...	Mariana Rivas ..	Main location		
OPERATOR 1	SITE 2		Production facility 2	Calle Alcanadre 15, 2...	Rosario Flores ..	Sk...		

C. For a Group of Operators:

“OPERATOR 1” refers to the "Lead Operator", who manages the account within the CERTIAPP platform. The remaining operators are identified from “OPERATOR 2” onwards.

- 1) To add the **first operator**, add a new row.
- 2) Complete "Number of Operator" = "OPERATOR 1" and "Number of Site" = "SITE 1" (Site 1 of Operator 1 must always be the main location).
- 3) Complete "Location", the address, and the contact person, and enter "Main Location". Save with "Save".

- 4) To add **Site 2 of Operator 1**, create a new row, keeping "Number of Operator" = "OPERATOR 1" and changing "Number of Site" to "SITE 2".
- 5) Select the corresponding location (for example, "Production Facility 2").

- 6) Add the address and contact person, and indicate the approximate distance from the main site.
Attention: the question "*Does anyone in the company have the official Brand course completed?*" must not be completed; simply enter "-" as the answer.
- 7) Save with **"Save"**.

- 8) To add a **second operator**, create a new row.
- 9) In this example, **Operator 2** has only 1 site, so complete "Number of Operator" = "**OPERATOR 2**" and "Number of Site" = "**SITE 3**" (continuing the overall site numbering, since Operator 1 took sites 1 and 2).
- 10) Select the corresponding location (for example, "**Production Facility 3**") and add the address, the contact person, and the approximate distance from Operator 1's main site.
Attention: once again, the question on the official Brand course must not be completed; enter "-".
- 11) Save with **"Save"** and repeat this process for each additional operator and site, following the same criteria, until the registration of the entire group is complete.

Once all operators have been completed with their corresponding sites, the global summary view will be as follows:

Number of ..	Num.	1. Le..	Location	Enter the compl..	Contact Pe..	Approxima..	2. Pre..	Lic.
OPERATOR 1	SITE 1	Production facility	Calle Albarque 15, 2.	Mariana Rivas	Main location	Ros		
OPERATOR 1	SITE 2	Production facility 2	Calle Mercuro 92, 28.	Rosario Flores	5km	WH		
OPERATOR 2	SITE 3	Production facility 3	Calle Latas 26, 2802.	Ariana Santos	15km	Ros		

3) "Group of Operators Information" Table

This table must be completed **only** by "Group of Operators" type operators; single-site or multi-site individual operators must not complete it.

In this table, the information of each member operator of the group is added, organized by rows. To add a row, click on the "+" icon.

Only for Groups of Operators: The Lead Operator's information should be entered in the table below as "OPERATOR 1". If the applicant is not a Group of Operators, this table should not be completed.

The information in the following table must match what was declared in the previous table regarding operators. If there are 3 operators in the group, this table must show their data and sites.

Question 5 must state which sites (from the table above) belong to each operator. For example: operator 1 (always the lead operator) gets site 1 (the main site), plus site 2 and site 3; Operator 2 gets site 4 and 5; and Operator 3 gets site 6 and 7.

Question 6 must state the total number of sites for each operator. Using the same example, operator 1 has 3 sites, operator 2 has 2 sites, and operator 3 has 2 sites.

The sum of all these sites goes in the "Operators description" table, under operator type (group of operators) and total number of locations under the same certification scope – in this example, 7.

GROUP OF OPERATORS INFORMATION

Operator Num...	1. Name of the ...	2. VAT Num...	3. Le...	4. Co...	For th...	5. Ind...	For th...

In the pop-up window:

- **"Operator Number"**: enter the number of the corresponding operator (for example, "OPERATOR 1", always in capital letters), and complete the remaining questions.

New Record

Only for Groups of Operators: The Lead Operator's information should be entered in the table below as "OPERATOR 1". If the applicant is not a Group of Operators this table should not be completed.

*Operator Number (For example this information is for the OPERATOR 1)

1. Name of the Legal Entity

2. VAT Number (CIF/VAT/ BUC/cother)

3. Legal Entity Registered Address (Street/ Ave/Roadside + City + Province/State + Postal Code + Country)

4. Contact Person (Full name + Position + email + telephone)

For the next question you must state

5. Indicate which sites declared in the

CANCEL SAVE

New Record

Only for Groups of Operators: The Lead Operator's information should be entered in the table below as "OPERATOR 1". If the applicant is not a Group of Operators this table should not be completed.

*Operator Number (For example this information is for the OPERATOR 1)

OPERATOR 1

1. Name of the Legal Entity

Royal Winery

2. VAT Number (CIF/VAT/ BUC/cother)

26559845

3. Legal Entity Registered Address (Street/ Ave/Roadside + City + Province/State + Postal Code + Country)

Calle Almirante 15, 28023, Madrid (Madrid) - Madrid / Spain

4. Contact Person (Full name + Position + email + telephone)

Mariona Zavaleta
Manager
m.zavaleta@bodegas.es

For the next question you must state

5. Indicate which sites declared in the

CANCEL SAVE

- **Question 5**: indicate the sites related to this operator, previously declared in the previous table. For example, if Operator 1 has sites 1 and 2, the answer must include "**SITE 1** and **SITE 2**".
- **Question 6**: indicate the total number of sites belonging to this operator (in this example, 2).

- **Question on the official Brand course** ("Does anyone in the company have the official Brand course completed?"): this question must be answered for each member of the group, entering "Yes" or "No" as appropriate.

Click on "**Save**" to save the information.

The same procedure must be repeated for Operator 2 and for each additional operator in the group, following the steps above, until the registration of all members is complete.

*Operator Num...	1. Name of the ...	2. VAT Num...	3. Le...	4. Co...	For th...	5. Ind...	For th...	6. Tot...	7. Do...
OPERATOR 1	Royal Winery	26599648L	Calle Alm...	Marrivis Z...	SITE 1 & 2			2	Yes
OPERATOR 2	Winery deluxe	56609578L	Calle Mer...	Sofia Tor...	SITE 3			1	Yes

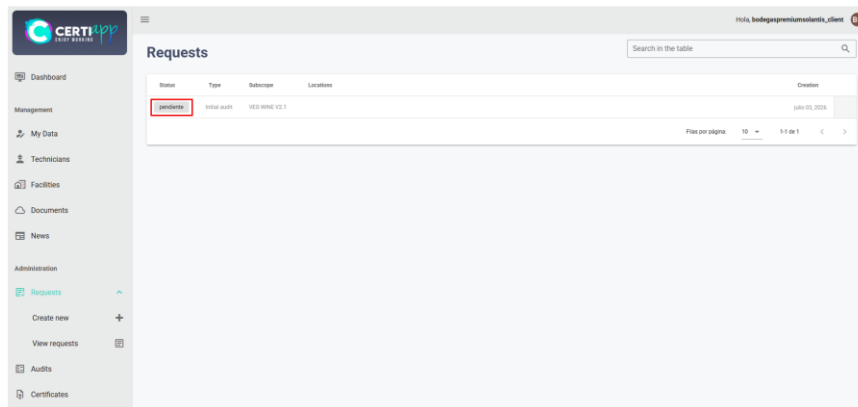
3.6.5. Additional Information Section

Enter, if applicable, the official website, any additional relevant information that could not be included in the previous questions, and a brief description of the company. **All of this information must be entered in English.**

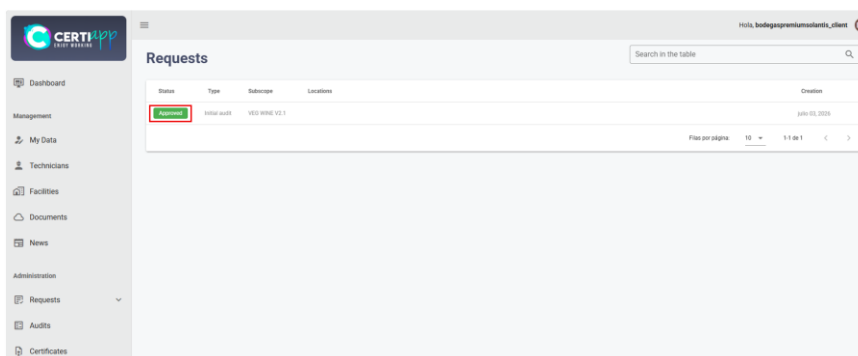
3.6.6. Information Confirmation Statement Section

Click on **"Continue"** and a summary of all the information completed in the request will be displayed. Check that everything is correct: to edit any item, click on **"Back"**; if everything is correct, click on **"Register Request"** to save the request.

Once saved, inform the Certification Body so that it can proceed with the review. Until the CB approves the request, it will remain in "**Pending**" status.



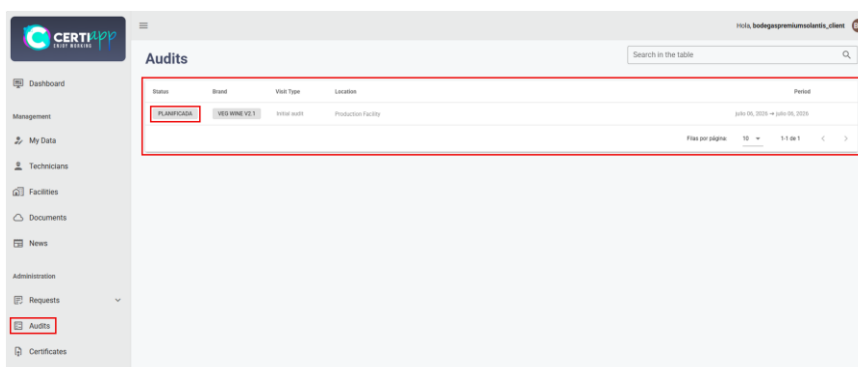
Once the CB approves the request, its status will change to "**Approved**" and it can no longer be edited. After approval, the CB must send the operator the request form in PDF, which will also be available in the document manager once the CB uploads it to the platform.



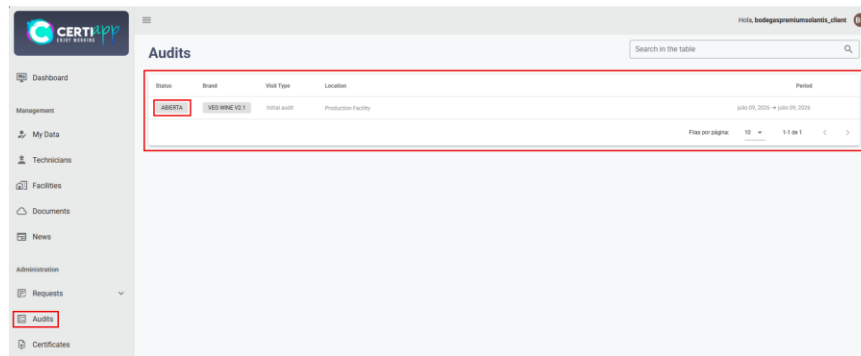
3.7. Resolving Non-Conformities

When the Scheme Manager plans the audit, it will appear in the "Audits" section with "Planned" status. Once the auditor starts the process, it will move to "Open" status.

- **Planned:** the Scheme Manager has scheduled the audit, which will remain in this status until the corresponding auditor starts the process.



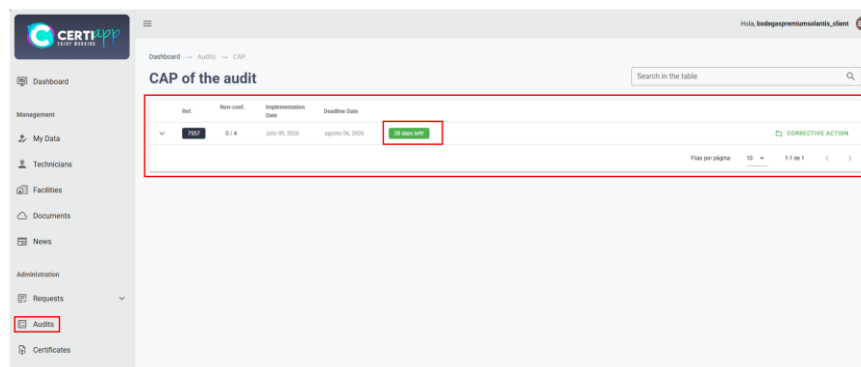
- **Open:** the assigned auditor has started the audit. After carrying it out, the auditor will send a Non-Conformity (NC) pack, which must be resolved within this same section. The auditor will send this pack only when the NCs are minor or serious, since in the case of a critical (K.O.) NC (non-compliance with a Level C in an essential requirement), the audit will be considered K.O.: it may be completed on the audit day, but the certification process cannot continue, in accordance with the General Rules.



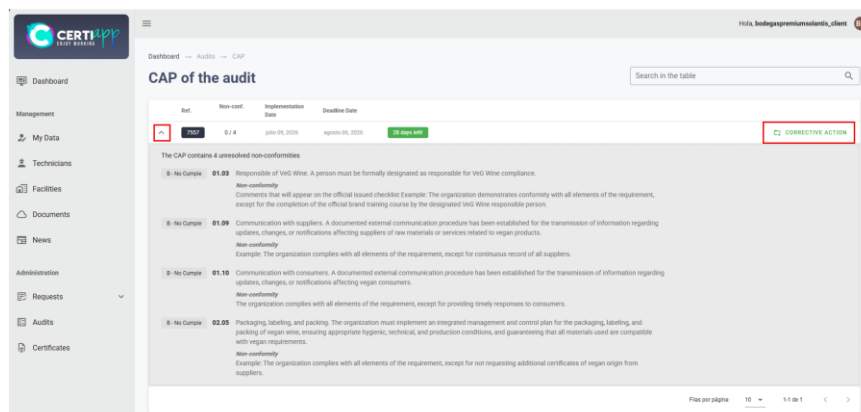
To view and resolve the Non-Conformities, click on the corresponding NC group. It shows the number of Non-Conformities, the deadline for submitting the resolution, and the days remaining until that date.

To expand the details of the NCs, click on the "▼" icon.

Note: Non-Conformity packs or groups are grouped by operator, not by site. That is, for a single-site or multi-site individual operator, a single group will be shown; whereas for a Group of Operators, a separate group will be shown for each operator.



To add corrective actions, click on "Corrective Action", which will open a pop-up window.

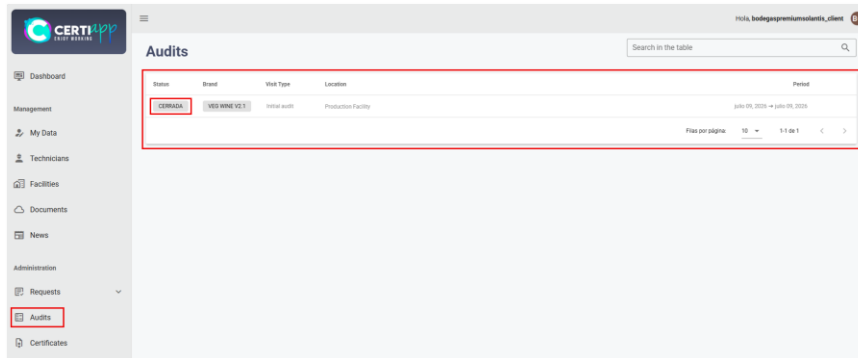


In this window, complete the fields corresponding to the corrective action and, to attach a file, click on "Add File", having first selected the NC to which that corrective action corresponds.

Once all corrective actions have been completed, the resolved Non-Conformities counter will show, for example, "4/4" (number of NCs with their corresponding corrective action out of the total number of NCs). To edit a corrective action already added, click on "Edit".

Once all corrective actions have been added, inform the auditor so that they can evaluate them. If the auditor considers that any action needs to be modified, it must be edited as indicated.

The audit will move to "**Closed**" status once the auditor evaluates the corrective action plan and closes the evaluation, or when the established deadline expires.



Once the auditor has evaluated and closed the audit, the auditor must send the operator the corresponding audit report.

3.8. Certificate

When the decision-maker issues a favorable result, the corresponding certificate will be generated and can be downloaded from this section by clicking on "Download".

