Real Estate Portal Quickstart Guide

Version 1.0

3 September 2019

Introduction

This is a quickstart guide for real estate salesperson, manager or agent users of the FCNB Portal (https://portal.fcnb.ca). It provides a brief introduction to the main features of the portal as it relates to real estate users.
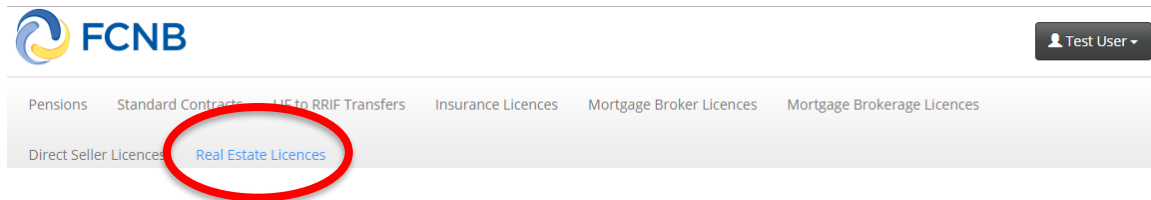
Please consult the general Real Estate help page at http://fcnb.ca/real-estate-agents.html or the FCNB Portal FAQ at http://fcnb.ca/portalfaq.html for additional guidance and resources regarding real estate functionality in our portal.

!	**This guide assumes that you have created an account and have logged in to the portal. If you do not have an account, please first consult the Portal Basics User Guide at http://fcnb.ca/portal-basics.html.**

Accessing the processes in the portal

Please ensure you select the appropriate option from the horizontal navigation bar at the top of the page. Click on the "Real Estate Licences" link in the grey menu bar at the top of the page to go to the "My Real Estate Licences" page.

Click the "Manage" button next to the licence you wish to view:

This will take you to the "Manage Licence Application" page.

Manage Licence Application

On this page you can view and manage various aspects of your licence or application.

For detailed explanations of each of the sections below, please click:

- This link if you are an agent.
- This link if you are a salesperson or manager.

You may need to scroll down to access the various buttons referenced.

Please note: The payment (if one is required) for your application, renewal or other submission, must be received in order for your submission to be fully submitted to FCNB for review.

Licence details

Transaction ID

190090266

Status

Active

Action buttons

Action buttons are listed at the bottom of the 'Manage Licence Application' page. Please note that depending on the status of your application or licence, type of licence and the expiry date of the licence, not all buttons will be displayed. Below is an example of possible buttons.

Actions

| Renew | File a Change in Circumstances | Download Application | Download Licence | Download Statement |

In addition to renewals and change in circumstances, agents can also complete branch management submissions to add, remove or update existing branches, and upgrade/downgrade licence submissions to increase or decrease the number of authorized salespersons for their licence.

Actions

| Renew | File a Change in Circumstances | Manage Branches | Upgrade/Downgrade Licence | Download Application | Download Licence |
| Download Statement |

Click on the button for the desired action to go to the first page of the selected process. For example, selecting "Renew" will bring you to this page:

Renewal

8%

Confirm applicant details

Your current portal profile information is shown below. Please review your information and confirm that the information is up-to-date by checking the box below. If any information is incorrect, please update your profile or file any required changes in circumstances before continuing with the renewal.

Licence

Real Estate - Salesperson - TEST Theresa Hughes

Licence type

Salesperson

!	**Note that each process step contains a yellow box with instructions. Please take the time to read the instructions on each page before proceeding. It will help you avoid unnecessary mistakes or delays.**

After carefully reading the instructions, make the appropriate selections or enter the required data as indicated.

Once you have completed a required step, click the "Next" button to proceed to the next step and "Submit" once you have completed all the required steps.

Please note: Once you have a Draft submission in progress, you can edit it by clicking on the corresponding Action button at the bottom of the page. For example, to edit a Draft renewal submission, click the Renew button.

Salespersons and Managers – Manage licence application page

On this page, salespersons and managers can see lists of any delegated parties, and their renewal and change in circumstances submissions. These submissions can be viewed by clicking on the Details option to the right of each entry in the list.

Delegated parties

Add

First name ⬆	Last name	Email

There are no records to display.

My renewal submissions

Transaction ID ↑	Current submitted to Agent date	Current submitted to FCNB and paid date	Status	Fee status

There are no records to display.

My change in circumstances submissions

Transaction ID ↑	Type of change	Current submitted to FCNB date	Status	
190090249	Information in licence application has changed	17/10/2019	Submitted to FCNB	▾

Agents – Manage licence application page

This page shows lists of any delegated parties, licensed branches, agent renewal submissions, agent change in circumstance submissions, agent upgrade/downgrade submissions, agent branch management submissions, salesperson/manager cancellation submissions and salesperson/manager change in circumstance submissions. These submissions can be viewed by clicking on the Details option to the right of each entry in the list.

Delegated parties

Add

First name ↑	Last name	Email

There are no records to display.

Branch locations

Description ↑	Address	Address line 2	City	Province/State	Region	Postal code	Country	Telephone	Phone extension	Fax	Email
East Branch#1	48 Charlotte St East		Sussex	New Brunswick		E2N 1p7	Canada	5066962222			joe@abc.com
West Branch#1	48 King St West		Woodstock	New Brunswick		E2N 1p7	Canada	5066962222			joe@abc.com

My renewal submissions

Transaction ID ↑	Current submitted to FCNB and paid date	Status	Fee status	
190090028		Draft		▾

My upgrade or downgrade licence submissions
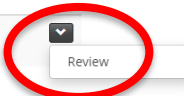
Transaction ID ↑	Current submitted to FCNB and paid date	Status	Fee status	
190090019		Submitted to FCNB		▾

In addition, there are lists of pending salesperson/manager applications and pending salesperson/manager renewals.

From these lists, agents can view or review salesperson and manager applications and renewals by clicking on the Review option to the right of the submission. Clicking Review opens a review page with additional Action buttons. Agents have the options to request more information, approve or reject the submission. Please note: Salespersons and managers are assigned to branches during the application approval process.

Pending salesperson and manager applications

≡ Pending Applications ▾

Transaction ID ↑	Licence holder name	Licence type	Current submitted to Agent date	Current submitted to FCNB and paid date	Status	Fee status	
190089310	My Legal Name	Salesperson	8/10/2019		Cancellation requested by Agent	Not Paid	☑ Review

Pending salesperson and manager renewals

Transaction ID ↑	Licence holder name	Licence type	Current submitted to Agent date	Current submitted to FCNB and paid date	Status	Fee status

There are no records to display.

Actions

Approve	Requires More Information	Reject	Download Application

From the list of active salesperson/manager licences, agents can submit requests to cancel salesperson or manager licences and can also change salesperson and manager branch assignments by clicking on the Manage option to the right of the submission. Clicking Manage opens a page with additional action buttons.

Active salesperson and manager licences

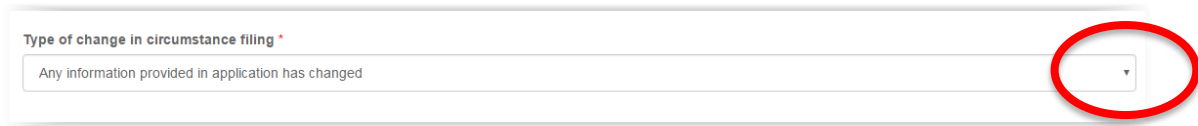| Transaction ID ↑	Licence holder name	Licence type	Expiry date	Status	Fee status	
190089310	My Legal Name	Salesperson	30/11/2019	Cancellation requested by Agent	Not Paid	☑ Manage

Actions

Cancel licence	Download Application	Assign Branch

How to enter data
The portal uses a few different ways of collecting information from you:

Dropdown box
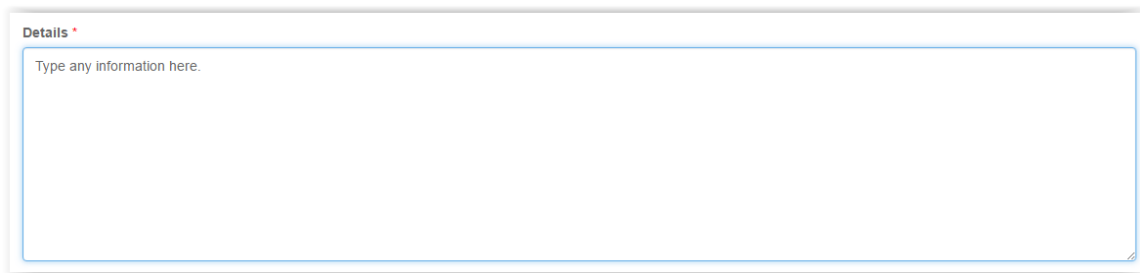Display available options by clicking on the little down arrow on the right:

Then, click on the desired option to select it. Your selection should now display in the box.
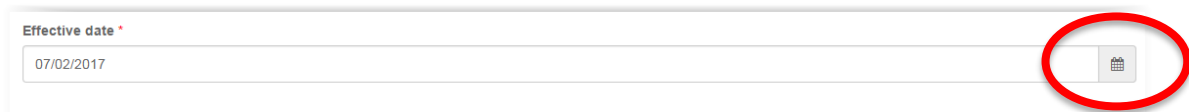
Text or data box
Simply click in the box and type in any required information:

Date selection box
Click on the calendar icon:

This will bring up a calendar dialog box:
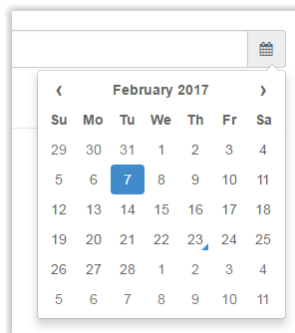
Click on the month year displayed (i.e. February 2017 in the above example). This will permit you to select a different month if the date you wish to select is in the present year. If it is not, click the year displayed (i.e. 2017 in the above example). This will display a decade selector:
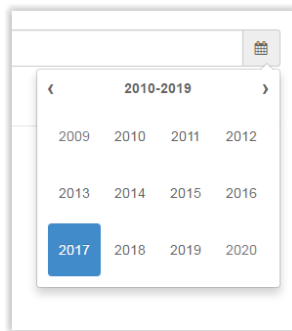
Click the small left or right arrow to move to a different decade, until the year of your choice is displayed. Then click that year. You can then click the month, and thereafter the day, to select your date.

Once selected, the selected date will be displayed in the date box:

Radio buttons

Simply click "No" or "Yes" in response the question posed:

Will the applicant provide or arrange financing of purchases? *
◉ No ○ Yes

In most cases "No" is pre-selected - please ensure that this is the correct response before proceeding. Also, note that depending upon your selection additional data fields may be required to be completed.

Error messages

If you do not properly complete required information on a particular step, you will see an error message at the top of the page after clicking "Next":

> ❶ The form could not be submitted for the following reasons:
>
> Credit grantors is a required field.
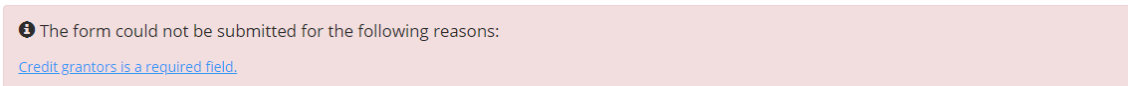
Review the error message and correct your selection or data entry. Then click "Next" again to proceed.

Uploading documents

Instructions for uploading documents are provided on every documents upload page:

Documents

You have completed the data entry portion of the process. Based on your selections during this online process, please upload the documents listed below.

How to upload a document:

- Place all files to be uploaded in the same directory or folder on your computer.
- Click the "Browse" button for a particular item to upload. A window to access files on your computer will appear. Browse to the folder containing your files.
- Select the file(s) on your computer (hold down the CTRL key to select multiple files) and click "Open" in the window. The text box to the left of the "Browse…" button should now indicate the selected files.
- Repeat this process for each item requiring document upload. Add any documents not within a particular category under the "Additional documents" item.
- Once you have selected files for all items, click "Upload". This will upload all your documents simultaneously.
- Once complete, uploaded documents will appear with the item with respect to which they were uploaded. Please ensure that all documents you wanted to upload are listed. Add further documents by clicking "Browse…" again. (Note that an additional Browse and Upload will add to the uploaded list and will not replace previously uploaded files. To delete a particular uploaded file, click the little garbage can to the right of the file.)

File name restrictions: Please note that hyphen, underscore and period ('-', '_' and '.') are the only non-alphanumeric characters permitted in the name of a file you upload. A file name containing any other non-alphanumeric character will be rejected by the system and cannot be uploaded.

Mandatory uploads have a red asterisk beside them (*).

Proof of NBREA Membership *

[   ] Browse...

Criminal Record Check *

[   ] Browse...

Additional documents

[   ] Browse...

Upload

Previous   Next   Close

In order to make the document upload process as easy as possible, ensure that you have all your documents scanned (preferably to PDF format) and placed together in a folder on your computer.

Payment step

Many processes have a payment step:

Fees and Payment
Fee summary

190087274-Real Estate - Salesperson - TEST Theresa Hughes

Transaction ID: 190087274

Description:	Fee
Base Fee	$50.00
Total Fee:	**$50.00**

Payment Method:

○ **Pay online using Visa, MC, Amex**

○ **I will send or deliver payment to FCNB separately**

[Previous] [Submit]

Select whether you wish to pay online or will be sending in your payment later. If you select to pay online, you will be redirected to an online payment page, where you will be asked to complete an online transaction, whereafter you will be redirected to a Fee Statement page. If you select to send payment in separately, you will be directed to this page immediately:

Fees and Payment
Fee Summary

190087274-Real Estate - Salesperson - TEST Theresa Hughes

Transaction ID: 190087274
Transaction date: 2019-09-04
Payment Method: I will send or deliver payment to FCNB separately
Payment status: Unpaid

Fee details:

Base Fee	$50.00
Total	**$50.00**

[Download Statement]

[Previous] [Done]

If you are sending payment separately, please download a copy of your fee statement to send along with your payment. When you are finished click "Done" to complete the process. You can access details of your submission by clicking the "Manage" button again and looking for submission details displayed there.

Help and Support

Please note that the Support staff is responsible for dealing with IT inquiries and that any suitability or licensing questions must be raised with our Consumer Licensing division.

If you are unsure of the answer required in a field, please contact the Consumer Affairs division at consumer.licensing@fcnb.ca.

If you are experiencing technical difficulties with the portal, please submit a support request using our online support request form at https://portal.fcnb.ca/requestsupport/:

Help

FCNB Portal Home / Request support

Request support

Describe the problem

Type *

Regulatory area *

Transaction ID or Licence #, if applicable

Details

Contact information

Name *

Email *

Phone Number *

Submit