



Direct Sellers Portal Quickstart Guide


Version 1.1

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Introduction

This is a quickstart guide for direct seller salesperson or vendor 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 direct seller users.

Please consult the general Direct Sellers help page at <http://fcnb.ca/direct-sellers.html> or the FCNB Portal FAQ at <http://fcnb.ca/portalfaq.html> for additional guidance and resources regarding direct seller 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 “Direct Sellers” link in the grey menu bar at the top of the page to go to the “My Direct Sellers Licences” page.



Click the “Manage” button next to the licence you wish to view:


[Add](#)

My Direct Seller Licences

Guides to using the portal are available on-line:
Portal Basics: <http://fcnb.ca/portal-basics.html>
Direct Sellers Guides: <https://fcnb.ca/en/online-services/fcnb-self-serve-portal/direct-sellers-portal-faq>
Please select the appropriate option below to add a new licence or to manage an existing licence.

Status

- **Draft** - Application has been started; however, not completed. Please click the **Edit** button.
- **Submitted to vendor** - Application is pending review and approval by the vendor.
- **Vendor requires more information** - The vendor is seeking further information from the applicant. Please click the **Edit** button.
- **Submitted to FCNB** - Application is submitted to FCNB for review. **Please note: Your application will not be reviewed until payment has been received.**
- **FCNB Requires More Information** - The FCNB is seeking further information from the applicant. Please click the **Edit** button.
- **Being Reviewed by FCNB** - Application is in the review process.
- **Rejected** - Application has been rejected. Please check your email for correspondence.
- **Closed Application** - Application has been closed by FCNB as the applicant did not respond to request(s) to provide additional information.



Transaction ID ↑	Licence type	Vendor name	Expiry date	Status	Fee Status	
180054592	Salesperson	Test		Submitted to Vendor	Not Paid	Manage
190090103	Vendor	Test Legal Name		FCNB Requires More Information	Not Paid	Manage Edit

This will take you to the “Manage Licence” page:

Manage Licence

On this page you can manage your licence or application.

If the legal name under which direct seller activities will be conducted has changed, a new licence application is required. The licence cannot be renewed.

Licence Details

Transaction ID

180054592

Status

Submitted to Vendor

Licence type

Salesperson

Legal name under which direct seller activities will be conducted

Test

Description of goods and/or services to be sold

xxx

Please note that depending on your licence type you will see different options as you are scrolling to and once you reach the bottom of the page.

Possible actions are listed at the bottom of the screen. Please note that depending on the status of your application or the time at which you are verifying said application, not all buttons will be displayed.

Actions

Upgrade Licence

Renew

File a Change in Circumstance

Request Licence Withdrawal

Download Application

Download Licence

Click on the button for the desired action. This will bring you to the first page of the selected process.

For example, selecting “Request Licence Withdrawal” will bring you to this page:

Request Licence Withdrawal

Reason for withdrawal

Please provide a detailed description of the reason for the withdrawal.

Reason for withdrawal *

Next

Close



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.

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:

Type of change in circumstance filing *

Any information provided in application has changed

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:

Details *

Type any information here.

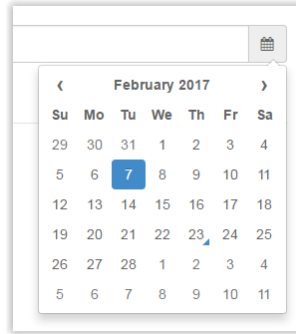
Date selection box

Click on the calendar icon:

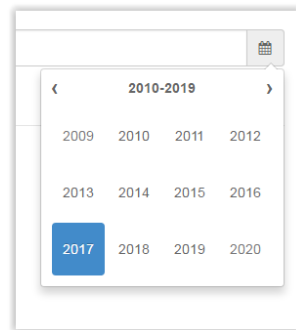
Effective date *

07/02/2017

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”:

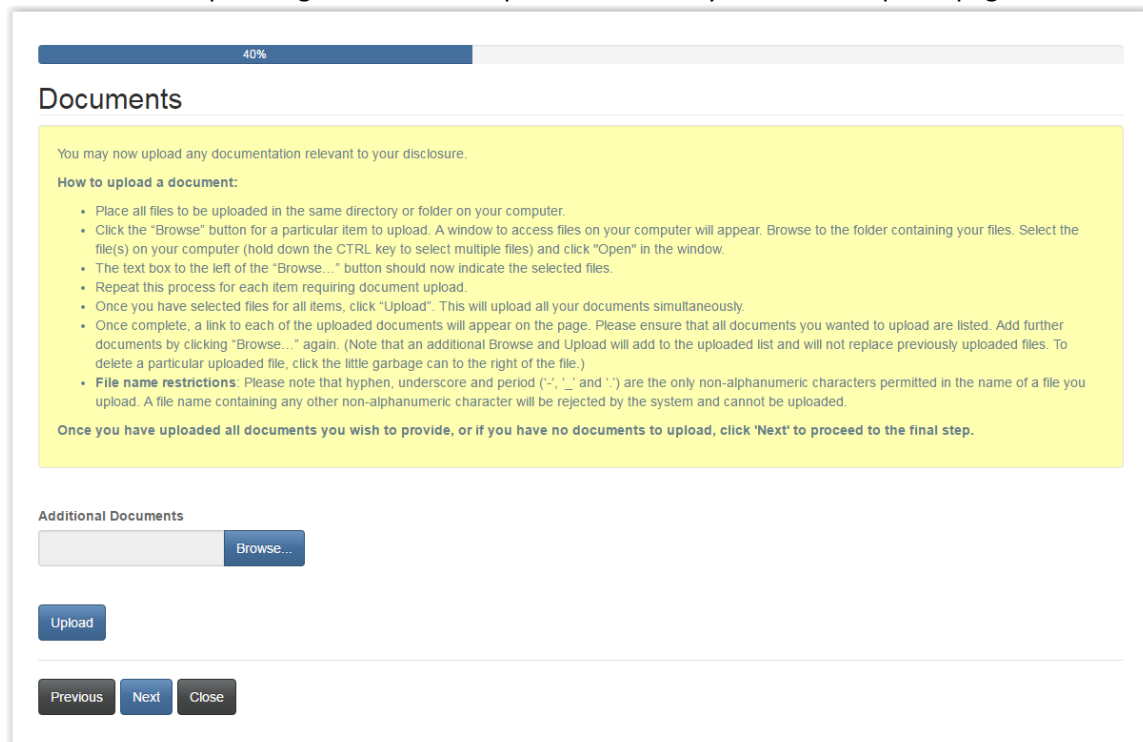
 The form could not be submitted for the following reasons:

[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:



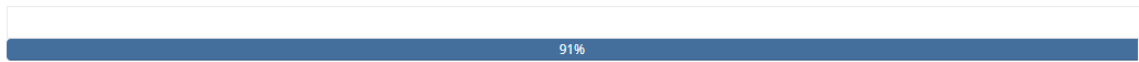
The screenshot shows a document upload interface. At the top, there is a progress bar indicating 40% completion. Below the progress bar, the heading "Documents" is displayed. A yellow box contains the following text: "You may now upload any documentation relevant to your disclosure." Underneath, the section "How to upload a document:" is followed by a bulleted list of instructions: "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.", "Once you have selected files for all items, click 'Upload'. This will upload all your documents simultaneously.", "Once complete, a link to each of the uploaded documents will appear on the page. 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.)", and "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." Below the yellow box, there is a section titled "Additional Documents" with a text input field and a "Browse..." button. Below that is an "Upload" button. At the bottom, there are three buttons: "Previous", "Next", and "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:

Apply For A New Licence



Fees and Payment

Fee summary

Description:	Fee
Application / Renewal / Filing / Process fee:	\$3,000.00
Total Fee:	\$3,000.00

Payment Method:

- Pay online using Visa, MC, Amex or Interac debit card
- I will send or deliver payment to FCNB separately

[Previous](#) [Next](#) [Close](#)

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 a Moneris online payment page, where you will be asked to complete an online transaction, whereafter you will be redirected to a Receipt page. If you select to send payment in separately, you will be directed to this page immediately:

Fees and Payment

Fee Summary

Transaction ID: 170059484
Transaction date: 11/28/2017
Applicant: TEST Theresa Hughes
Payment Method: I will send or deliver payment to FCNB separately
Payment status: Unpaid

Fee details:

Application / Renewal / Filing / Process fee:	\$3,000.00
Total	\$3,000.00

[Download Fee Summary](#)

[Previous](#) [Submit](#) [Close](#)

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