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:

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:
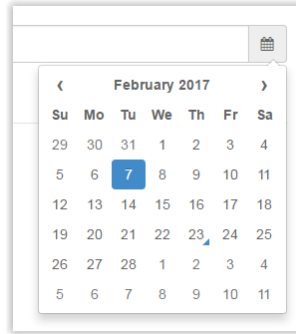
Details *

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:
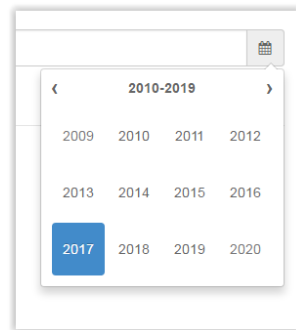
Click the small left or right arrow to move to a different decade, until the year of your choice is displayed. Then click that year. You can then click the month, and thereafter the day, to select your date.

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

Radio buttons

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

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":
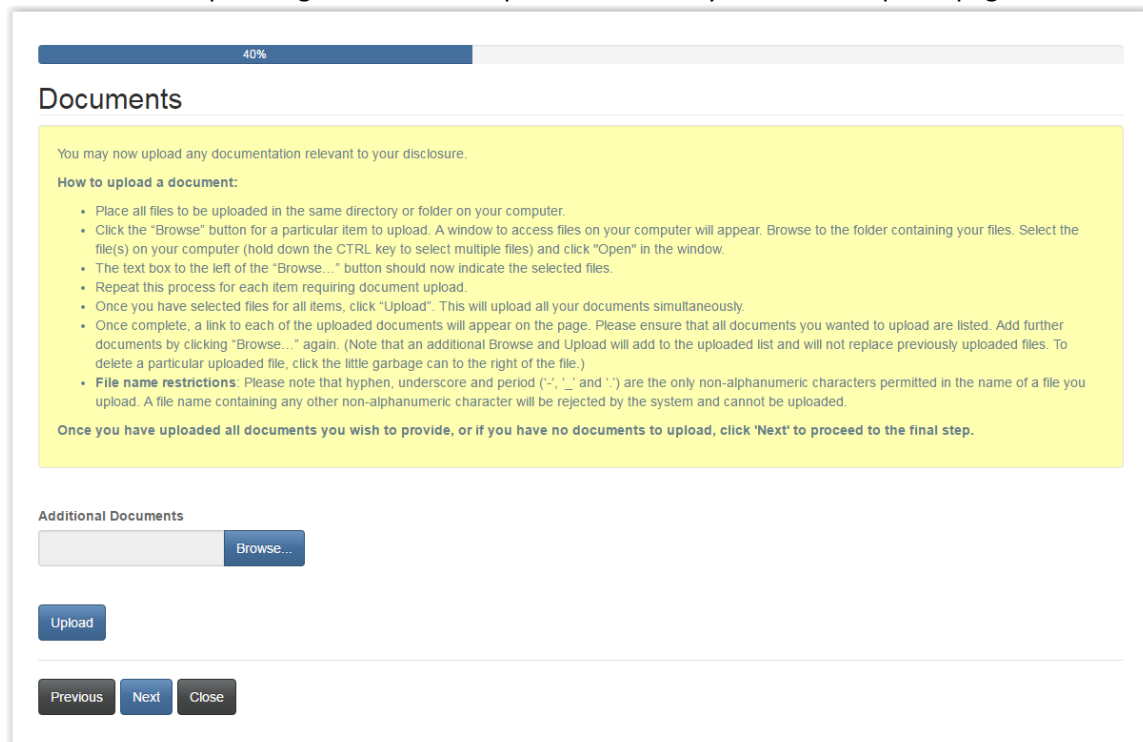
> ⓘ The form could not be submitted for the following reasons:
>
> Credit grantors is a required field.

Review the error message and correct your selection or data entry. Then click "Next" again to proceed.

Uploading documents

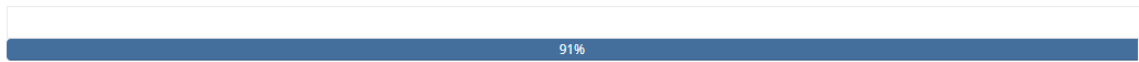Instructions for uploading documents are provided on every documents upload page:

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

91%

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 *

Submit