



CRM
Version 0.1



Technical Standards and Safety Authority

Onboarding Portal User Guide





Redeeming Your Invite & Completing the Registration Process

Contents

Overview	2
Prerequisites:.....	2
Redeeming Portal Code.....	3
Completing Registration Form	4

Overview

This training document will teach users how to complete their onboarding process for the portal by redeeming their code, sent to them in the portal invitation/email, and completing their registration form online.

Prerequisites:

- User received Portal Invite email from TSSA.



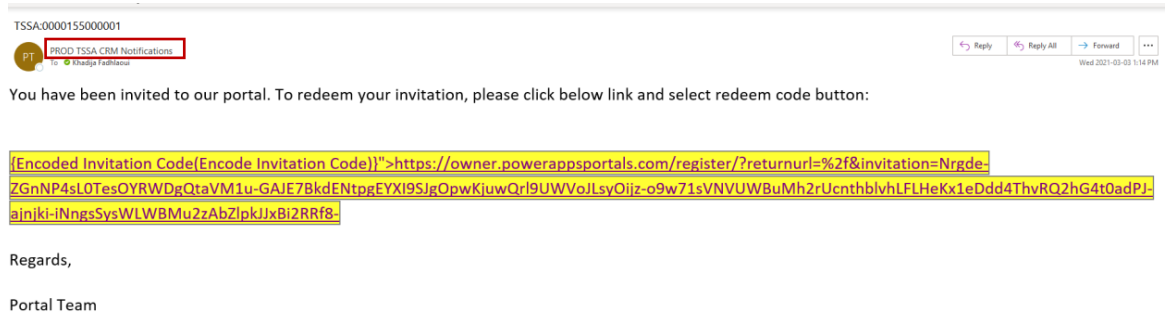
Step-by-step Instructions

Step	Task	Screen
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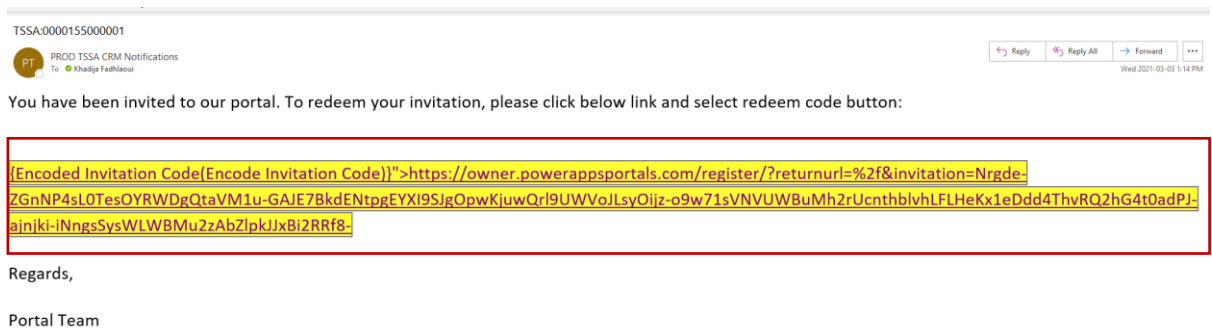
Redeeming Portal Code

1. Open Email sent to you from “PROD TSSA CRM Notifications”

△ *If you have not received a portal invite please call TSSA at 416.734.3400 or Email BPV_Inquiries@tssa.org*



2. Click on the link embedded in the Email Body
> User will be directed to the Portal, the Reedem Invitation Page





Click on the blue Redeem Code Button

> User will be redirected to Registration Form Page

Completing Registration Form

Complete the mandatory fields on the Registration Form

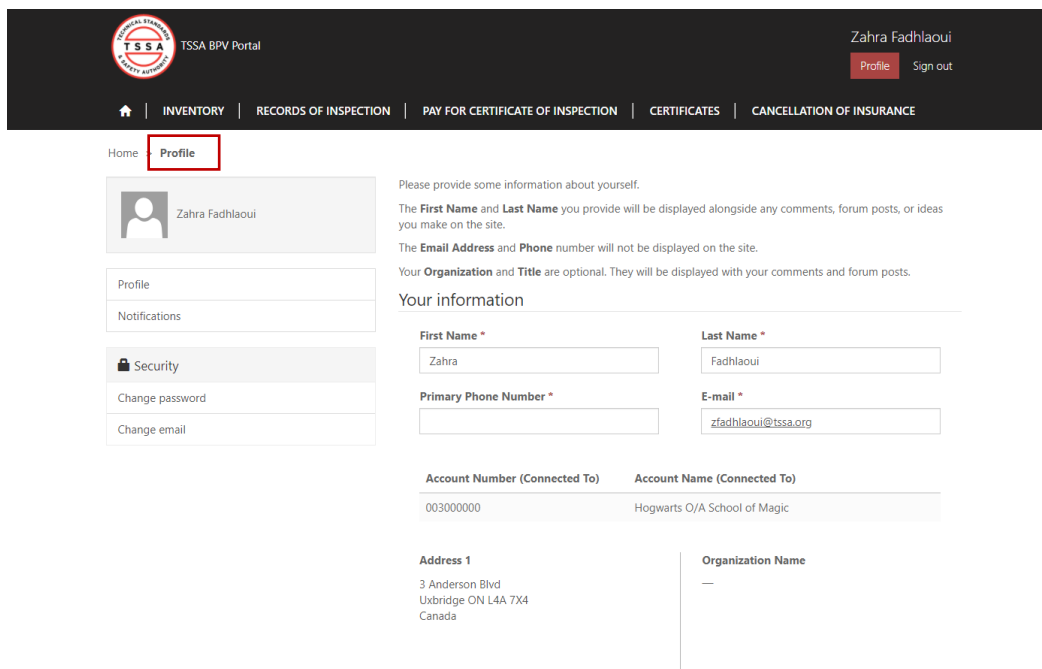
- ✓ Username
- ✓ Password
- ✓ Confirm Password

△ Username can also be your email address

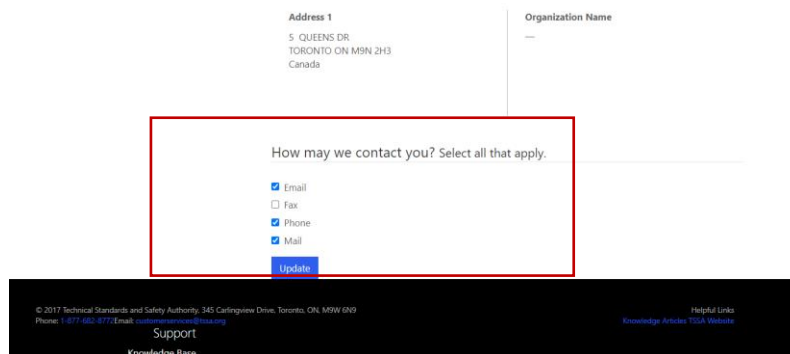


Click on Register Button

> User will be directed to the Profile Page inside their Portal Account



Complete the method of Contact section located at the bottom of the Profile Page. Click on Update once selection is made.



Confirmation e-mail will be sent to user once the portal account is successfully registered with TSSA.



To	✉ Zahra Fadhlaoui
Cc	---
Bcc	---
Subject	Portal Account Created TSSA:0000108000568

Dear Zahra Fadhlaoui,
Congratulations! Your portal account has been successfully registered with TSSA.
Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.
Thank You
Customer Service