

# How to Update Contact Connections



This guide will provide you with step-by-step instructions on how to update your contact connections in the TSSA Client Portal.



**Alert! Only Portal Managers and Property Management Companies can update the Contact Connections.**

**1** From the Client Portal home page, click the "**Account**" tab.

Customer Portal

**Hi Ada Shelby**  
Welcome to the TSSA portal, where customers can view and manage account information, submit application requests, pay invoices, and more.

**New Customers**  
Create an Individual account if you are applying for:

- A personal certificate

For all other requests create an Organization account

- We require the company's legal entity details, i.e., corporation number or business identification number.

**Third Party Property Management Companies**  
Link to your own TSSA account prior to linking to the owner/operator you wish to transact on behalf of, i.e. pay an invoice, submit an application request,

If you do not have an account with TSSA:

- Please create a Third-Party Property Manager account first,
- Then proceed to linking to the owner/operator you wish to transact on behalf of.

**Existing Customers**  
Link to your TSSA account with,

- Invoice or inspection report or
- Valid authorization (licence/certificate)
- Account Access Key

**Third Party Submitters**  
Link to your own TSSA account prior to linking to the owner/operator you wish to transact on behalf of, i.e. submit an application request,

If you do not have an account with TSSA:

- Please create a Third-Party Submitter account first,
- Then proceed to linking to the owner/operator you wish to transact on behalf of.

## 2 Click on the **TSSA** account.

Portal Manager 1

<a href="#">Aby Shelby</a>	Account Number: 003018036	0 Exams	0 Authorizations	0 Work Or
<a href="#">David Smith O/A Dell Enterprises</a>	Account Number: 003018017	0 Inventory	0 Authorizations	0 Work Or
<a href="#">June Lee</a>	Account Number: 003018003	0 Exams	0 Authorizations	0 Work Or
<a href="#">Karen Tremel O/A Auto Cars</a>	Account Number: 003018042	0 Inventory	0 Authorizations	0 Work Or
<a href="#">Tesl</a>	Account Number: 003	0 Inventory	0 Authorizations	0 Work Or
<a href="#">View</a>	Account Number: 003	0 Inventory	0 Authorizations	0 Work Or

## 3 The **Account** will appear. Click the **"Edit"** button.

Home > Accounts > Account Details

**Karen Tremel O/A Auto Cars**  
Account Number: 003018042

**Account Summary** Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name	Karen Tremel O/A Auto Cars	55 Mutual St Toronto, ON Canada M5B 2A9	<a href="mailto:karentremel@gmail.com">karentremel@gmail.com</a> 01 4376532567
Account Access Key	W8G3F1		Secondary Contact(s)
Third Party Account Purpose	Submitter		

[View All Authorizations](#) [View All Inspection Reports](#) [View All Non-Compliances](#)

[View All Contacts](#) [View All Inventory](#) [View All Work Orders in Progress](#)

[View All Invoices](#)

4 The "Account Management" page will appear.

## Account Management

Account Number: 472

### Account Details

(Please [click here](#) for process to update any information in this section.)

Account Type  
Organization

Legal Name  
COS

Other Name Type  
N/A

Corporation Information

Corporation Number  
ONT 00

Account Name  
COS

Other Name

Corporation Jurisdiction  
Ontario

### Contact Details

Shipping Preferred Delivery Method  
Mail

Primary Account Email Address  
PERMITSCAN

Primary Phone Type  
Business

Primary Phone Country Code  
01

Billing Preferred Delivery Method  
Email

Billing Email  
treasur

Secondary Phone Type

Secondary Phone Country Code

Secondary Phone Number

Edit



Alert! To change a Contact's email address and connection role, you need to inactivate the existing Contact and create a new record.

5 To change the email address for a contact, scroll down and click the "Inactivate" button.

### Contact Connections ⓘ

Add

Contact Name	Contact Role ⓘ	Email	Primary Phone	Starting Date	Status	
DARRYL D	Contact for	@oxford properties.com	64750		Active	Edit Inactivate
Mon	Portal Manager for Account (Contact)	mba		2024	Active	Edit Inactivate

6 Click the "Add" button.

Contact Connections ⓘ Add

Contact Name	Contact Role ⓘ	Email	Primary Phone	Starting Date	Status	
DARRYL D	Contact for	@oxford properties.com	64750		Active	<span>Edit</span> <span>Inactivate</span>
Mon	Portal Manager for Account (Contact)	mba		2024	Active	<span>Edit</span> <span>Inactivate</span>

7 Enter the details and add the **new email address**.

M9W 4L7, Canada Management

### Add Connection Details ✕

First Name\*

Last Name\*

Email\*  
 ●

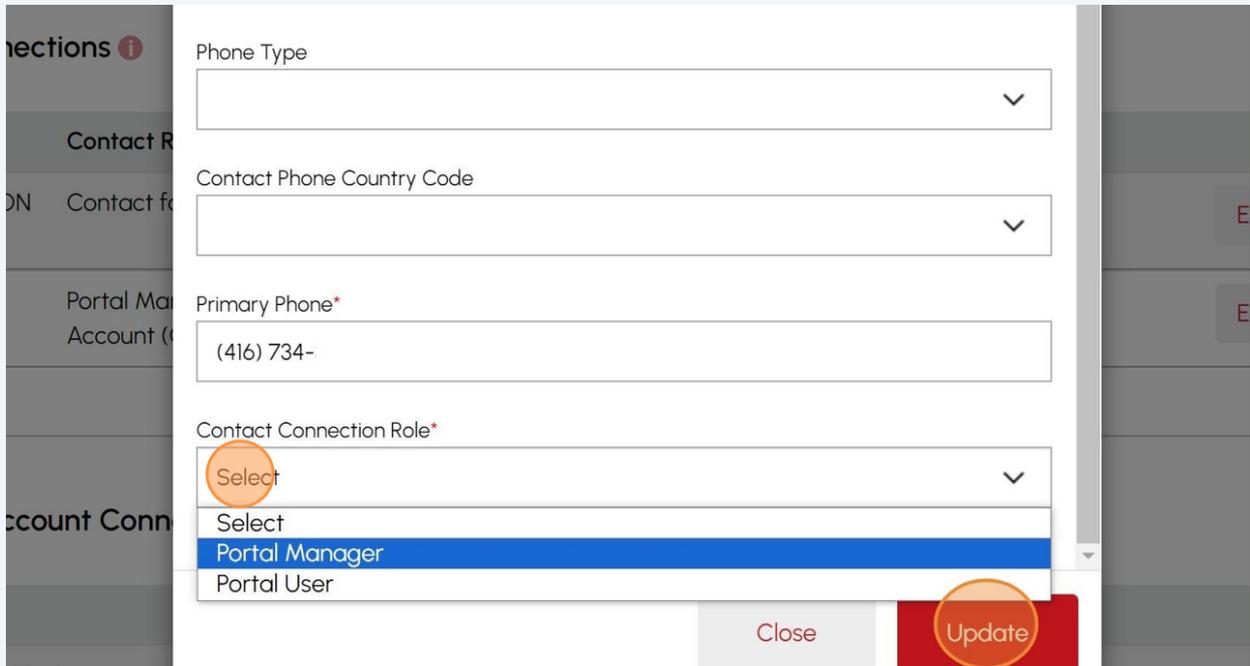
Phone Type  
 ▼

Contact Phone Country Code  
 ▼

8 Select one of the following **"Contact Connection Role"**:

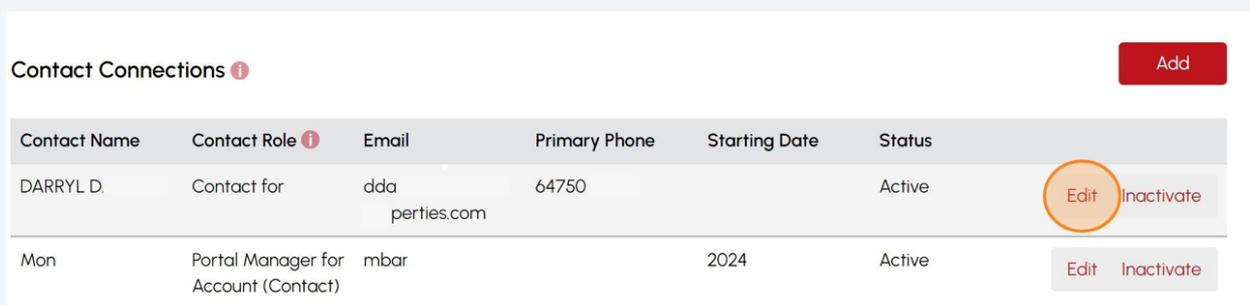
- Portal Manager
- Portal User

Click the **"Update"** button.



The screenshot shows a form for updating contact information. The fields include: Phone Type (dropdown), Contact Phone Country Code (dropdown), Primary Phone\* (text input with '(416) 734-' entered), and Contact Connection Role\* (dropdown menu). The dropdown menu is open, showing options: Select, Portal Manager (highlighted in blue), and Portal User. An orange circle highlights the 'Update' button at the bottom right of the form.

9 To change the primary phone number for a contact, scroll down and click the **"Edit"** button.



The screenshot shows a table titled 'Contact Connections' with an 'Add' button in the top right. The table has columns: Contact Name, Contact Role, Email, Primary Phone, Starting Date, and Status. The 'Edit' button for the first row is circled in orange.

Contact Name	Contact Role	Email	Primary Phone	Starting Date	Status	
DARRYL D.	Contact for	dda perties.com	64750		Active	<a href="#">Edit</a> <a href="#">Inactivate</a>
Mon	Portal Manager for Account (Contact)	mbar		2024	Active	<a href="#">Edit</a> <a href="#">Inactivate</a>

**10** Enter the new **primary phone number**. Click the **"Update"** button.

The screenshot shows a contact update form with the following fields and values:

- First Name\*: DARRYL
- Last Name\*: DAV
- Phone Type\*: Business
- Contact Phone Country Code\*: Barb
- Primary Phone\*: (647) 505. (An orange circle highlights the dot after the number)
- Primary Phone Extension: (empty)

At the bottom right of the form, there are two buttons: "Close" (grey) and "Update" (red). The "Update" button is circled in orange.

**i** Congratulations! You have successfully changed the "Existing Contact" including "Email Address", "Phone Number" and "Contact Connect Role" in the TSSA Client Portal.

**11** Contact Customer Service at 1-877-682-TSSA (8772) or send an email to [customerservices@tssa.org](mailto:customerservices@tssa.org) in case of any questions.