

# How to update Account Contact Details



This guide will provide you with step-by-step instructions on how to update "Account Contact Details" in the TSSA Client Portal.

**1** From the Client Portal homepage, click the "**Accounts**" tab.

Customer Portal

Hi Ada Shelby

Welcome to the TSSA portal, where, customers can view and manage account information, submit applic

**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.

**Existing C**

Link to your

- Invoice c
- Valid aut
- Account

**Third Party Property Management Companies**

Link to your own TSSA account prior to linking to the owner/operator you wish to

**Third Part**

Link to your

2 Click a listed **TSSA account**. The account details will appear.

Customer Portal > Accounts

Hi Eric Lee!

Create Account Link Existing Account

Portal Manager ⓘ

Name	Account Number	Exams	Authorizations	Work Orders In Progress	Unpaid Invoices
Aby Shelby	00301	0	0	0	0
David Smith O/A De	00301	0	0	0	0

3 Click the **"Edit"** button to proceed to the **"Account Management"** page.

Customer Portal > Accounts > Account Details

David Smith O/A Dell Enterprises  
Account Number: 003018017

Account Summary

Account Type	Organization	Primary Address	Primary Contact
Account Name	David Smith O/A Dell Enterprises	77 Mutual St Toronto, Ontario Canada M5B 0B9	1264 4375462432

Secondary Contact(s)

Edit

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

Scroll down to "**Contact Details**" and click "**Edit**".

## Account Management

Account Number: 003019136

### Account Details

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

Account Type  
Organization

Legal Name  
Google

Other Name Type  
O/A

Business Registry Information  
Business Number

Charity Information  
Charity Number  
445566

Third Party Information  
Third Party Account Key  
(Please contact TSSA to change the key if required)  
HIM8D6

Account Name  
Google O/A Google corp

Other Name  
Google corp

Business Identification Number Expiry Date

Third Party Account Purpose  
Submitter

Contact Details

Shipping Preferred Delivery Method  
Mail

Billing Preferred Delivery Method  
Mail

Edit

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Complete the following fields to update the **Contact Details**.

to update any information in this

### Update Contact Details

Shipping Preferred Delivery Method  
Email

Primary Account Email Address\*  
kevinbrown@gmail.com

Billing Preferred Delivery Method  
Email

Billing Email\*  
kevinbrown@gmail.com

Primary Phone Type  
Business

Primary Phone Country Code\*  
Canada

Primary Phone Number\*  
(437) 654-

Primary Phone Extension

Mutual St Toronto O

Activity Type

Close Update

Attention

Name  
with O/A Dell Enterpris  
me  
prises  
Identification Number  
/24  
ferred Delivery Metho  
ail  
ry Phone Type  
ry Phone Country Cod  
ry Phone Number  
ry Phone Extension

6 Click the "Update" button.

The screenshot shows a modal form for updating contact information. The form contains the following fields:

- Email: [Dropdown menu]
- Billing Email\*: kevinbrown@gmail.com
- Primary Phone Type: Business
- Primary Phone Country Code\*: Canada
- Primary Phone Number\*: (437) 654-
- Primary Phone Extension: [Empty text box]

At the bottom of the form, there are two buttons: "Close" and "Update". The "Update" button is highlighted with an orange circle. In the background, a "Change Address" button is also visible.

7 Review the updated information in the "Contact Details" section.

The screenshot displays the "Contact Details" section of a user profile. It is organized into two columns of information:

Account Details	Account Information	Billing Information
<p>(Please <a href="#">click here</a> for process to update any information in this section.)</p>	<p>Account Type Organization</p> <p>Legal Name David Smith</p> <p>Other Name Type O/A</p> <p>Business Registry Information</p> <p>Business Number 33226655</p>	<p>Account Name David Smith O/A Dell Enterprises</p> <p>Other Name Dell Enterprises</p> <p>Business Identification Number Expiry Date 2024</p>
Contact Details	<p>Shipping Preferred Delivery Method Email</p> <p>Primary Account Email Address kevinbrown@gmail.com</p> <p>Primary Phone Type Business</p> <p>Primary Phone Country Code 01</p> <p>Primary Phone Number 4376548</p> <p>Primary Phone Number Extension</p>	<p>Billing Preferred Delivery Method Email</p> <p>Billing Email kevinbrown@gmail.com</p> <p>Secondary Phone Type</p> <p>Secondary Phone Country Code</p> <p>Secondary Phone Number</p> <p>Secondary Phone Extension</p>

An orange circle highlights the "Primary Phone Number" field in the "Contact Details" section.

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**Important:** If the updated **Billing preferred delivery method** is changed from **"Mail"** to **"Email"**, the changes will reflect in the Account Addresses. Click **"Edit"**.

Account Addresses 1

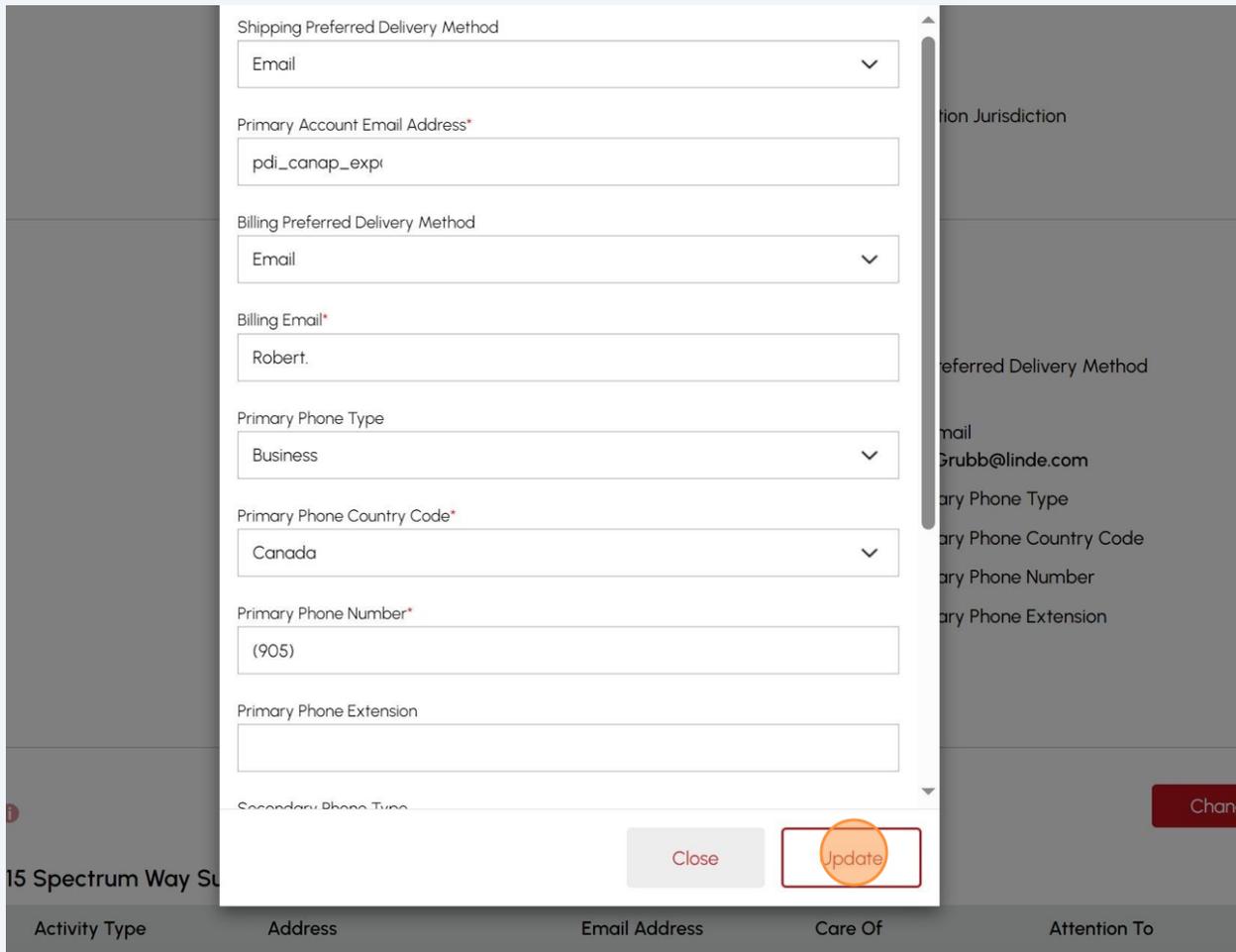
Change Address

Primary Address: HUNT CLUB RD OTTAWA ON 1C5 Canada

Address Type	Activity Type	Address	Email Address	Care Of	Attention To	
Bill To		HUNT CLUB RD, OTTAWA, ON, K2E Canada	treasury @cost		Tom	
Ship To	Authorization	WEST HUNT CLUB RD, OTTAWA, ON, 1C5, Canada				
Ship To	Correspondence	HUNT CLUB RD, OTTAWA, ON, K2E Canada				
Ship To	Inspection Report	WEST HUNT CLUB RD, OTTAWA, ON, 1C5, Canada				

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Click the **"Shipping preferred delivery method"** field and select from **"Mail"** to **"Email"**. Click **"Update"**.



10 To add an email address for "Shipping preferred delivery method", click "Edit".

Primary Phone Number Secondary Phone Extension

Primary Phone Number Extension

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Account Addresses 1 Change Address

Primary Address: 5015 Spectrum Way Suite 500 Mississauga ON L4W 0E4 Canada

Address Type	Activity Type	Address	Email Address	Care Of	Attention To
Bill To		BISCAYNE CRES, BRAMPTON, ON, L6W Canada			<span>Edit</span>
Bill To		Spectrum Mississauga, ON	Suite 500, 0E4, Canada	_exp@imaget	<span>Edit</span>
Bill To		BARMAC DR, TORONTO, ON, M9L Canada			<span>Edit</span>
Ship To	Authorization	CRES, BRAMPTON  ON, L6W 4R3, Canada			<span>Edit</span>
Ship To	Authorization	Spectrum Mississauga, ON,	Suite 500, 0E4, Canada		<span>Edit</span>
Ship To	Authorization	DR, TORONTO, ON, 2X8, Canada			<span>Edit</span>

11 Enter the email, select an Addressee, and "Attention To/Care of".

Secondary Phone Extension

Change A

### Update Additional Details

Email

Addressee

Attention To/Care Of

Close Update

Spectrum Way Su

Activity Type

Attention To

Authorization

145 BISCAYNE CRES, BRAMPTON

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If an Addressee is selected, input the name of the individual, department, or company in the Attention To or Care of field.

Update Additional Details

Email  
pdi\_canap\_

Addressee  
Attention To

Attention To\*  
Kevin

Close Update

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The email address for "**Shipping preferred delivery method**" is updated.

Repeat the same steps for all the Ship To addresses, i.e. Ship To Correspondence, Ship To Authorization, Ship To Inspection Report.

Primary Phone Number Extension

Account Addresses ⓘ Change Address

Primary Address: 5015 Spectrum Way Suite 500 Mississauga ON L4W 0E4 Canada

Address Type	Activity Type	Address	Email Address	Care Of	Attention To	
Bill To		BISCAYNE CRES. BRAMPTON, ON. L4R3, Canada				Edit
Bill To		Way, Suite 500, Mississauga, ON. L4W 0E4, Canada	Robert.			Edit
Bill To		BARMAC DR, TORONTO, ON. M9L Canada				Edit
Ship To	Authorization	BISCAYNE CRES. BRAMPTON, ON. L6W Canada	pdi_canap_		Kevin Brown	Edit
Ship To	Authorization	Way, Suite 500, Mississauga, ON. L4W Canada	_exp@imgaget ek-inc.com			Edit



Congratulations! You have successfully reviewed how to update the "Account Contact Details" in the TSSA Client Portal.

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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.