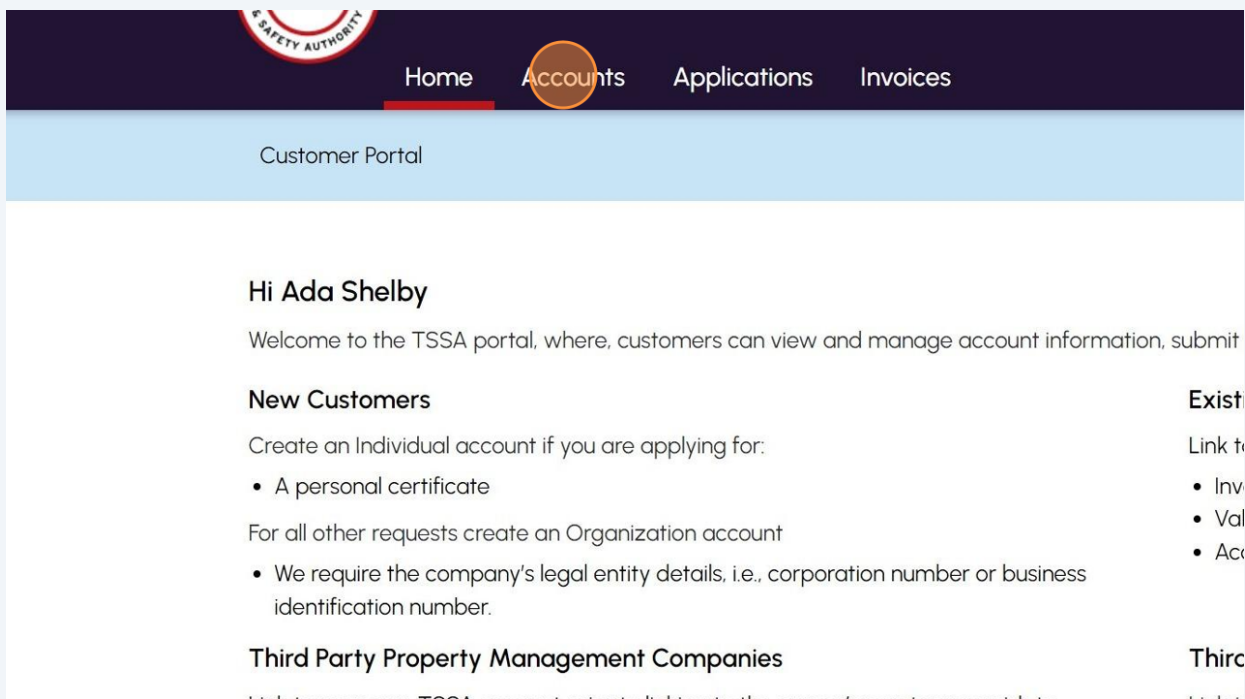


Overview of Portal User Responsibilities



This guide will provide you with step-by-step instructions on how to navigate, view details, and update TSSA accounts as the "Portal User".

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



2 Click a TSSA Account.

Customer Portal > Accounts

Hi David Smith!

Create Account Link Existing Account

Portal Manager

Account Name	Account Number	Inventory	Authorizations	Work Orders In Progress	Unpaid Invoices
David Smith	00301	0	0	0	0
June	0030	0	0	0	0
Tesla O/A	0030	0	0	0	0
ViewSonic O/A	00301	0	0	0	0

Portal User

Account Name	Account Number	Inventory	Authorizations	Work Orders In Progress	Unpaid Invoices
CANADA'S WONDER	3	11	14	14	3

3 The "Account Details" page will appear. You will be able to:

- View All Authorizations
- View All Inspection Reports
- View All Non-Compliances
- View All Inventory
- View All Work Orders in Progress
- View All Invoices

TSSA TECHNICAL STANDARDS SAFETY AUTHORITY

Home Accounts Applications Invoices Profile Sign out

BPV Owner BPV Insurer

Customer Portal > Accounts > Account Details

Account Number: 003

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	1264 4375462432 Secondary Contact(s)

View All Authorizations View All Inspection Reports View All Non-Compliances

View All Inventory View All Work Orders in Progress

View All Invoices

4

Click "**View All Authorizations**". The "**Authorizations/Certificates**" page will appear.

Technical Standards
TSSA
SAFETY AUTHORITY

Home Accounts Applications Invoices Profile Sign out
BPV Owner BPV Insurer

Customer Portal > Accounts > Account Details

Account Number: 003

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	1264 4375462432 Secondary Contact(s)

View All Authorizations

View All Inspection Reports

View All Inventory

View All Invoices

View All Non-Compliances

View All Work Orders in Progress

5

Click the "**Download Excel**" button to download a list of Authorizations/Certificates.

To narrow your search for a specific authorization/certificate, enter the **authorization/certificate number** in the **Search** field.

Technical Standards
TSSA
SAFETY AUTHORITY

Home Accounts Applications Invoices

Customer Portal > Accounts > Account Details > Authorization View

Authorizations/Certificates

Account Name : WHOLESALE CANADA LTD.
Account Number : 472

Show 10 entries Search:

Service Item Name	Program	Authorization Number	Start Date	Expiry Date	Status	Inventory	Site Name	Site Address
COI for ROI - Triennial	Boilers and Pressure Vessels	COI1	January 19, 2021	January 18,	Expired	6466	Site	35 JOHN BIRCHALL RD, RICHMOND HILL, ON, L4S 0B2, Canada

Download Excel

6

Click an **Authorization number** to download a copy of the **Authorization/Certificate**.

Show 10 entries

Search:

Service Item Name	Program	Authorization Number	Start Date	Expiry Date	Status	Inventory	Site Name
COI for ROI - Triennial	Boilers and Pressure Vessels	COI10	March 31, 2021	March 30	Active	6507	Site
COI for ROI - Triennial	Boilers and Pressure Vessels	COI10	March 31, 2021	March	Active	650	Site

7

Click **"View All Inspection Reports"** from **"Account Details"**. The **"Inspection Reports"** page will appear.

TSSA TECHNICAL STANDARDS & SAFETY AUTHORITY

Home Accounts Applications Invoices Profile Sign out BPV Owner BPV Insurer

Home > Accounts > Account Details

Account Number: 003

Account Summary [Edit](#)

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	kevinbrown@gmail.com 01 4376548653
			Secondary Contact(s)

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

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

[View All Invoices](#)

8 Click the **"Download Excel"** button to download a list of Inspection Reports.

Or enter the **inspection report number** in the **Search** field to narrow your search.

Customer Portal > Accounts > Account Details > Inspection Reports View

Inspection Reports Download Excel

Please visit the ["Open Orders"](#) page to review the most up-to-date unresolved non-compliance information regarding your device/facility/ equipment/ business.
 Account Name: WHOLESALE CANADA LTD.
 Account Number: 472

Show entries Search:

Inspection Report Number	Program	Inventory	Inventory Group Number	OE Plant Number	Inspection Address	Inspection Completion Date	WO Number	Inspection Task Type
1001	Operating Engineer	-	-	649	55 NEW HUNTINGTON RD, VAUGHAN, ON, L4H 3M9, Canada	April	803	OE Periodic Inspection - Regulatory

9 Click an **Inspection report number**. It will download a copy of the **Inspection report**.

Show entries Search:

Inspection Report Number	Program	Inventory	Inventory Group Number	OE Plant Number	Inspection Address	Inspection Completion Date	WO Number
1014	Boilers and Pressure Vessels	-	-	-	559 DOURO ST, STRATFORD, ON, N5A 0E3, Canada	December 2023	141810
1014	Boilers and Pressure Vessels	-	-	-	234 Lockhart Rd, Barrie, ON, L4N 9G8, Canada	January 2024	14181
1014	Boilers and Pressure Vessels	10002	-	-	559 DOURO ST, STRATFORD, ON, N5A 0E3, Canada	December 2023	14188

559 DOURO ST,

10 Click **"View All Non-Compliances"** from **"Account Details"**.

Account Number: 003

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	kevinbrown@gmail.com 01 4376548653
			Secondary Contact(s)

View All Authorizations | View All Inspection Reports | **View All Non-Compliances** | View All Work Orders in Progress

View All Inventory | View All Invoices

11 Click the **"Download Excel"** button to download a list of Inspection Reports.

Or enter the **open non-compliance number** in the **Search** field to narrow your search.

Open Non-Compliances Download Excel

The following represents the most up-to-date unresolved non-compliance information regarding your device/facility/ equipment/ business.

Account Name : WHOLESALE CANADA LTD.
Account Number : 4

Show 10 entries Search:

Priority	Program	Inspection Report Number	Inventory/Inventor Group	OE Plant	Site Address	Non-Compliance	Compliance Date
High	Fuels Safety	10051214	648	N/A	1415 BLAIR PL. GLOUCESTER, ON. K1J 1A5, Canada	Comply with clause 5.8.2 of the CAN/CSA-B149.2 Code, and ensure the discharge of a regulator vent, line relief valve, or hydrostatic relief valve is provided with a loose-fitting rain cap if discharging vertically upward, or a protective screen	January

12 Click **"View All Inventory"**. The **"Inventory"** page will appear.

Beta Trial Portal

TSSA TECHNICAL STANDARDS & SAFETY AUTHORITY

Home Accounts Applications Invoices Profile Sign out

BPV Owner BPV Insurer

Home > Accounts > Account Details

Account Number: 00

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	kevinbrown@gmail.com 01 4376548653
			Secondary Contact(s)

View All Authorizations View All Inspection Reports View All Non-Compliances View All Work Orders in Progress View All Invoices

View All Inventory

13 Click the **"Download Excel"** button to download a list of Inventories.

Or enter the **inventory number** in the **Search** field to find an inventory.

Customer Portal > Accounts > Account Details > Inventory View

Inventory Download Excel

Account Name : WHOLESALE CANADA LTD.
Account Number : 4

Note: If inventory status is Active and the corresponding authorization is not in an Active status or is not displayed on the [Authorizations](#) view, please contact TSSA Customer Services.

Show 10 entries Search:

Inventory Number	Status	Site Name	Site (Address)	Program	Asset Type
01	Draft	Site	2200 ISLINGTON AVE. UNIT D2, ETOBICOKE, ON, M9W 3W4, Canada	Fuels Safety	Liquid Fuels / FS Gasoline Station - Card/Keylock
01	Draft	Site	87 Harry Walker Pkwy S, Newmarket, ON, L3Y 9E7, Canada	Fuels Safety	Liquid Fuels / FS Gasoline Station - Card/Keylock

14

Click on **"View All Work Orders in Progress"** from **"Account Details"**. The **"Work Orders in Progress"** page will appear.

Home Accounts Applications Invoices Profile Sign out BPV Owner BPV Insurer

Home > Accounts > Account Details

Account Number: 00

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	kevinbrown@gmail.com 01 4376548653
			Secondary Contact(s)

View All Authorizations View All Inspection Reports View All Non-Compliances View All Work Orders in Progress View All Inventory View All Invoices

15

Click the **"Download Excel"** button to download a list of Work Orders.

Or enter the **work order number** in the **Search** field to find a work order.

Customer Portal > Accounts > Account Details > Work Orders In Progress

Work Orders In Progress Download Excel

Account Name : WHOLESALE CANADA LTD.
Account Number : 4

Show 10 entries Search:

Work Order Number	Status	Service Type	Service Item	Inventory Number	Site Address	Application Received Date	Application Number
800	Open	Registration - OE Plant	OE Plant Registration		1849 MERIVALE RD, NEPEAN, ON, K2G 1E3, Canada	January 26,	N/A
800	Open	Registration - OE Plant	OE Plant Registration		770 SILVER SEVEN RD, OTTAWA, ON, K2V 1A5, Canada	January 26,	N/A

16 Click on **"View All Invoices"** from **"Account Details"**.

Home > Accounts > Account Details

Account Number: 00

Account Summary Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	kevinbrown@gmail.com 01 4376548653
			Secondary Contact(s)


View All Authorizations View All Inspection Reports View All Non-Compliances

View All Inventory View All Work Orders in Progress

View All Invoices

17 Click on **"Unpaid Invoices"** to view unpaid invoices.

beta TSSA Portal

 Home Accounts Applications Invoices Profile Sign out

BPV Owner BPV Insurer

Home > Invoices

Invoices

TSSA Account

O/A Enterprises - 0030

Invoices **Unpaid Invoices** Paid Invoices

18 Click an **unpaid invoice number** to download a copy of the **unpaid invoice**.

Select the "**Download Excel**" button to download a list of invoices.

Or enter the unpaid invoice number in the **Search** field to narrow your search.

Unpaid Invoices Download Excel

Account Name :
Account Number :


Select specific invoices to be processed for payment or you may click on Select All for all invoices to be processed. Click on the Invoice Number to view the Invoice. PDF.

Search:

Select All	Invoice Number	Authorizatic Number	Consolidate Invoice Number	Work Order Number	Service Category	Service Item	Total Amount	Invoice Date	Due Date	Invoice Balance Due
<input type="checkbox"/>	938	FS-LIC-50		831	FS Authorization	FS Rene...	\$197.50	May 01,	May 31,	\$197.50
<input type="checkbox"/>	938	FS-LIC-		111011	FS	FS R...	\$197.50	October	November	\$197.50

19 Click on "**Paid Invoices**" from **Invoices** section to view paid invoices.

Beta Trial Portal

Profile Sign out

Home Accounts Applications InvoicesBPV Owner BPV Insurer

Home > Invoices

Invoices

TSSA Account

Invoices

Unpaid Invoices**Paid Invoices**

20 Click a **paid invoice number** to download a copy of the **paid invoice**.

You can also click the "**Download Excel**" button to download a list of invoices.

Or enter the paid invoice number in the **Search** field to find paid invoices.

Paid Invoices Download Excel

Invoices paid on or after April 1 2022
Account Name :
Account Number : 32

Show entries Search:

Invoice Number	Authorizator Number	Consolidated Invoice Number	Work Order Number	Service Category	Service Item	Invoice Settlement Date	Total Amount	Invoice Balance Due	Status
908	000		80	FS Authorization	FS Renewal Propane Highway Tank	February 14,	\$185.00	\$0.00	Closed

21 Once you have viewed your account details, move to the "**Account Details**" page to edit your account details.

Click "**Edit**" from "**Account Details**" to edit your account details.

TSSA Profile Sign out

Home Accounts Applications Invoices BPV Owner BPV Insurer

Customer Portal > Accounts > Account Details

Account Number 00

Edit

Account Type	Organization	Primary Address	Primary Contact
Account Name		77 Mutual St Toronto, Ontario Canada M5B 0B9	1264 4375462432 Secondary Contact(s)

View All Authorizations

View All Inspection Reports

View All Non-Compliances

View All Inventory

View All Work Orders in Progress

View All Invoices

22 The **"Account Management"** page will appear.

Click the **"Click here"** hyperlink for information on how to update the account's **"Legal Name"**.

Account Management

Account Number:

Account Details

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

Account Type
Organization

Legal Name

Other Name Type
O/A

Business Registry Information

Business Number
44

Third Party Information

Account Name

Other Name

Business Identification Number Expiry Date
2024

Third Party Account Purpose

Contact Details

Shipping Preferred Delivery Method
Email

Primary Account Email Address

Billing Preferred Delivery Method
Mail

Billing Email

Edit

23 Scroll down and click **"Edit"** under **"Contact Details"** section.

Account Number: 00

Account Details

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

Account Type
Organization

Legal Name

Other Name Type
O/A

Business Registry Information

Business Number
332

Account Name
David Smith O/A

Other Name
Dell Enterprises

Business Identification Number Expiry Date
2024

Contact Details

Shipping Preferred Delivery Method
Mail

Primary Account Email Address

Primary Phone Type
Business

Primary Phone Country Code
1264

Primary Phone Number
4375

Primary Phone Number Extension

Billing Preferred Delivery Method
Mail

Billing Email

Secondary Phone Type

Secondary Phone Country Code

Secondary Phone Number

Secondary Phone Extension

Edit

24

To change the **account contact details**, please follow the steps in the guide "**How to update Account Contact Details**".

Account Number: 003018017

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

Contact Details

Account Addresses ⓘ

Primary Address: 77 Mutual St Toronto Ontario M5B 0B9

Address Type	Activity Type
Bill To	

Update Contact Details

Shipping Preferred Delivery Method
Mail

Primary Account Email Address

Billing Preferred Delivery Method
Mail

Billing Email

Primary Phone Type
Business

Primary Phone Country Code*
Anguilla

Primary Phone Number*
4375462432

Primary Phone Extension

Secondary Phone Type
Select

Secondary Phone Country Code

Close Update

25

To change the **account address**, please follow the steps in the guide "**How to change Address**".

Important: A Portal User cannot update Contacts and Account Connections; however, a Portal Manager can.

Account Addresses ⓘ

Primary Address: 77 Mutual St Toronto Ontario M5B 0B9 Canada

Address Type	Activity Type	Address	Email Address	Care Of	Attention To
Bill To		77 Mutual St, Toronto, Ontario, M5B 0B9, Canada			Edit
Ship To	Authorization	77 Mutual St, Toronto, Ontario, M5B 0B9, Canada			Edit
Ship To	Correspondence	77 Mutual St, Toronto, Ontario, M5B 0B9, Canada			Edit
Ship To	Inspection Report	77 Mutual St, Toronto, Ontario, M5B 0B9, Canada			Edit

[Change Address](#)



Congratulations! You have successfully reviewed how to navigate, view details, and update a TSSA account as a portal user in the TSSA Client Portal.

26

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