

# Customer Portal Series

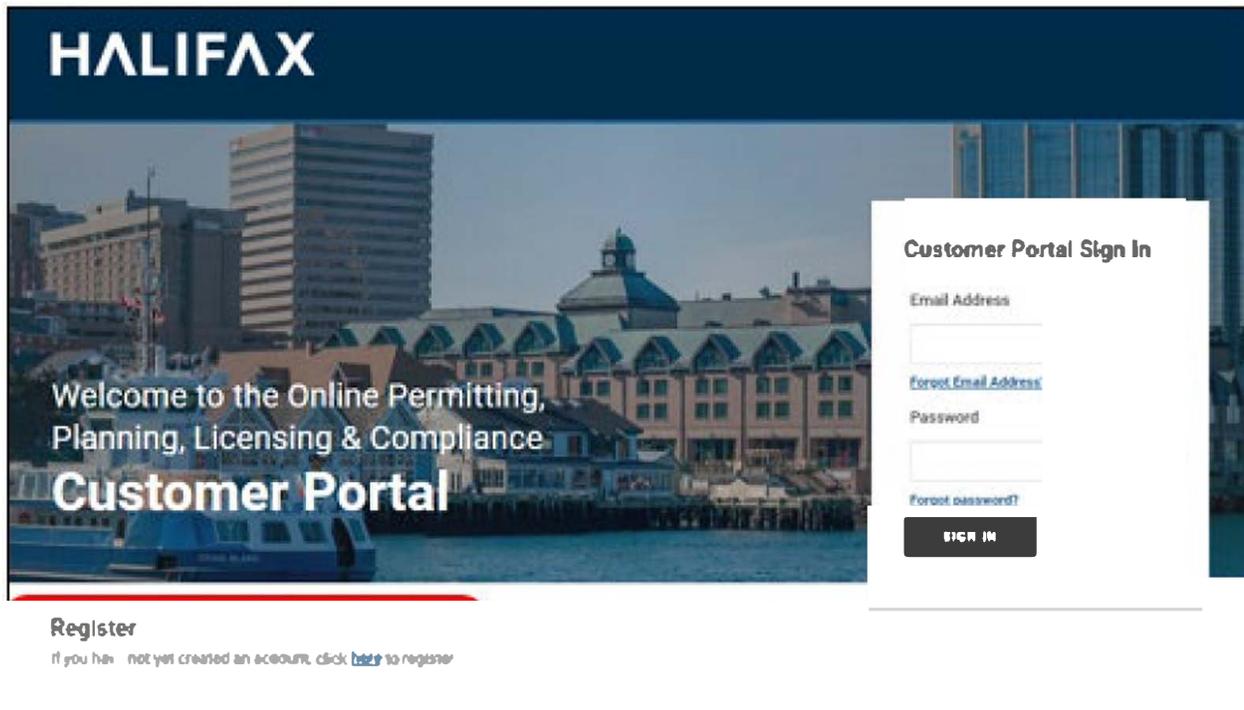
## Registering a Customer Portal Account

*Customers must register a customer portal account in order to use the online portal. The registration is a one-time process similar to registering for any online platform.*

### Access the registration / login page

Here is a link to the [Customer Portal Login](#)

**STEP 1:** At the bottom of the login page is a link to initiate a new account registration.



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**STEP 2:** Click the link

**STEP 3:** Complete the registration form. Fields marked with an asterisk are required. The registration will not proceed if those fields are blank.

Be sure to provide a security question as this will be used in the future to retrieve your password if you forget it.

When the form is complete click **'Finish Registration'**

The screenshot shows the registration page for the Halifax Online Learning Management System (LMS). At the top left is the 'HALIFAX' logo, and at the top right are links for 'Home' and 'Sign In'. The main heading is 'Welcome to Online LMS'. Below this is a paragraph of introductory text: 'Please register online. All fields with asterisks must be filled out in order to proceed. Once the information on this screen has been provided, the system will send a confirmation email with a link to this website, where you can confirm your registration.' Below the text are several sections of form fields:

- YOUR INFORMATION:** Includes fields for \*First Name, \*Last Name, \*Phone Number, \*Email Address (with a note: 'A valid email address is required as your email address will be used to send you emails from the system'), and \*Confirm Email.
- MAILING ADDRESS:** Includes fields for \*Address Type (with a dropdown menu showing 'Civic'), \*Street Address, Address Line 2, \*City / Town, \*State / Province (with a dropdown menu showing '(None)'), \*Country (with a dropdown menu showing '(None)'), and \*Zip / Postal Code.
- SECURITY QUESTION AND PASSWORD:** Includes fields for \*Security Question (with a dropdown menu showing '(None)'), \*Security Answer, \*Password (with a note: 'Password must be at least 8 characters, contain at least two (2) letters, one upper case and one lower case, and one number.'), and \*Confirm Password.
- Match Code:** A CAPTCHA image showing the characters '050p1'.

At the bottom of the form is a paragraph of privacy policy text: 'The personal information that you provide on this form and any attachments will be used for communicating with you concerning your application and for billing purposes. It is collected under the provisions of Section 33(1) of the Freedom of Information and Access to Information Act and is protected by the privacy provisions of the Act. Should you have any questions about the collection of your information, you may contact (Name Here) at (email here) or (phone number here) ADMIN.'

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**STEP 4:** Following the submission of the registration form you will see a confirmation page indicating your registration was submitted.

Note that in states your registration is **NOT** complete. This is because there is a validation step in an email sent to you that will authenticate your registration

HALIFAX

## Welcome to Online LMS

Your registration submission has been received.

Your user account's email address will be: Customer\_username@emailprovider.ca

Your registration is not complete.

We will send an email to the email address Username@emailprovider.ca

Follow the instructions in the email to complete your registration in the system

**STEP 5:** You will receive an automated email at the email address you entered in the registration form. The email contains a link to validate and complete the registration process.

Fr 6/26/2020 4:57 PM

**D** donotreply@plssystem.halifax.ca  
[External Email] Registration for Online LMS \* Test Email \*

To: Customer Name  
Cc:

[This email has been received from an external person or system]

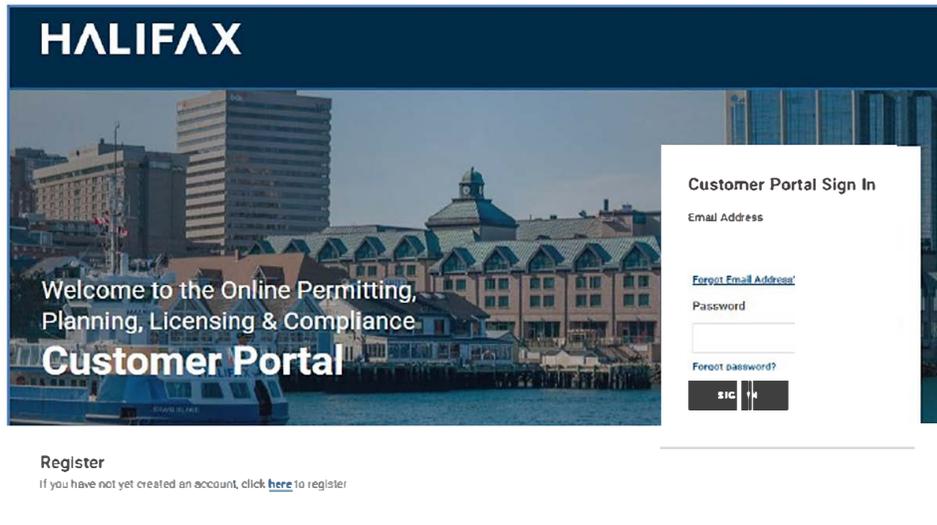
Dear User  
Thank you for *registering*. To activate your account and complete your registration, please [click here](#).

**Your Registration Information:**

First Name:	Customer Name
Last Name:	Last Name
Email Address:	Customer Username@emailprovider.ca
Phone Number:	(902) 555 XXXX
Security Question:	What is your favorite food?
Security Answer:	Pizza

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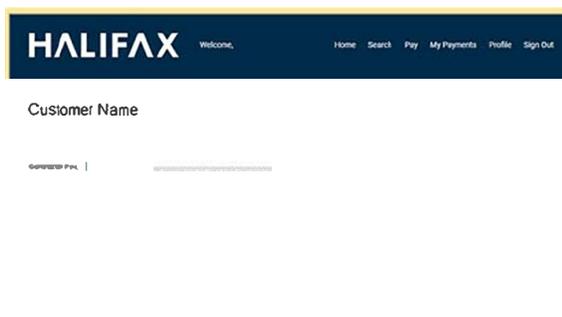
**STEP 6:** Click the link in the email and it verifies your email address is authentic. The login page for the Customer Portal will open.



All future access of the customer portal will begin at this log-in page. The registration steps are a one-time requirement only.

**STEP 8:** On your initial login you may be asked if you wish to create a contractor profile and a business profile.

Skip these steps for now to complete the activation of your online account. These options are available within your customer portal account at any time. Instructions for creating a contractor or business profile can be found on the website.



**SKIP**



**SKIP**

**Registering a Customer Portal Account**

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## STEP 9: Customer Portal Dashboard

All future logins will open to the Home Page of the Customer Portal. [See [How-to navigate the customer portal dashboard](#) for further instructions].

**HALIFAX** Welcome, Applicant Alex Home Search Pay My Payments Profile Sign Out

## Home

*Welcome to the Online Permitting, Planning, Licensing & Compliance Customer Portal*

**My Activities** is the **heart** of the Customer Portal - track your applications and check often for updates.  
**My Inspections** is where you can request and manage permit-related inspections.  
**My Businesses** is where you add and create Business Profiles for your License Applications.  
**My Projects** is where you can organize your permit and planning applications.

If your application does not appear in the My Activities tab below, use the Search in the menu above to retrieve. (You must be the applicant for this search to work).

**System Requirements**

**Permitting**  
> Apply for a Permit  
> Estimate Fees

**Planning**  
> Initiate Planning and/or Subdivision Application

**Licensing**  
> Apply for or Renew Licenses

**Compliance**  
> Report an Issue

[My Referrals](#)

**MY ACTIVITIES** MY INSPECTIONS MY PROJECTS MY BUSINESSES

Your account is now fully functional, and you can begin submitting applications online [See [How to apply for permits online](#) for further instruction].

To apply for permits on behalf of clients or your employer, you will need to create a contractor profile [See [How to create a contractor profile](#) for further instructions].

To apply for licenses for a Business, you will require a Business Profile. [See [How to create a business Profile from the Customer Portal.](#)]

To apply for planning applications, subdivision approvals or zoning confirmation letters on behalf of your company or your clients [create a professional/contractor profile.](#)