

Customer Portal Series

Creating a Contractor Profile

A customer must first complete the registration and setup of a customer account. A contractor profile may then be created. A customer can associate to one contractor company at a time. A contractor profile allows the account holder to apply for permits on behalf of their employer or clients.

Currently, only Right of Way (ROW) contractors require a license (proof of insurance).

There are two ways to create a contractor profile: – customers can 1) **Register as a New Contractor** or 2) **Associate to an Existing Contractor**. In this instance, contractor means contracting company.

STEP 1. Navigate to My Contractor Profile Section

From the customer dashboard menu bar open the **Profile** Page.

The screenshot shows the HALIFAX customer portal interface. The top navigation bar includes the HALIFAX logo, the user name 'Welcome, Dodi Todd', and several menu items: 'Home', 'Search', 'Pay', 'My Payments', 'Profile' (highlighted with a yellow box), and 'Sign Out'. Below the navigation bar, the page title is 'My Profile'. Underneath, there is a section for 'CUSTOMER DETAILS' with fields for 'First Name' (Dodi), 'Middle Name', 'Last Name' (Todd), and 'Email Address' (Dodi.Todd@Halifax.ca). There are 'Change Password' and 'Change Email' buttons. The 'Notification Method' section has radio buttons for 'Postal Mail' and 'Email' (selected), with a link for 'Action Completion Emails'. Below this is the 'MAILING ADDRESSES' section with a '+ Mailing Address' button and a table showing one address: '123 Somewhere Street, Halifax, NS B2N 1J0' with a 'Primary' checkbox checked. The 'PHONE NUMBERS' section has a '+ Phone Number' button and a table with columns for 'Type', 'Phone Number', and 'Ext.'. The 'Type' dropdown is set to 'Main', and the phone number is '(902) 555-4466'. At the bottom, there is a checkbox for 'I am associated with a Contractor?' and a 'Save' button.

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At the bottom of the page, select the box marked “I am Associated with a Contractor.”

I am associated with a Contractor?	<input type="checkbox"/>
I am associated with a Contractor?	<input checked="" type="checkbox"/>

This will open a new section called ‘MY CONTRACTOR’ where the contractor profile information is managed.

I am associated with a Contractor?	<input checked="" type="checkbox"/>
MY CONTRACTOR	
<i>Enter your Contractor PIN to associate your account with an existing contractor.</i>	
Contractor PIN: <input type="text"/>	Associate to Existing Contractor
<i>Register a new contractor and associate it to your account</i>	
+ Register as a New Contractor	

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STEP 2: OPTION 1 – Register as a New Contractor

This option is used by the first person to register a contractor profile for an organization. It will typically be the owner or manager of those responsible for applying for permits on behalf of the organization.

1. Click register as a new contract button.
2. Window open to collect contractor information: name of company / contact information etc.
3. Complete all required field in the form.
4. Save form when complete.

The screenshot shows a web form titled "Contractor" with a person icon. The form contains the following fields and sections:

- Business Name:** Mighty Builders Inc
- Doing Business As:** Mighty Builders
- Primary Phone Number:** (902) 222 - 2222
- Office Phone Number:** () -
- Cell Phone Number:** () -
- Fax Number:** () -
- Email Address:** elle.parker@yahoo.com

Below the form are three expandable sections:

- MAILING ADDRESS:** A button labeled "+ Mailing Address" is shown. Below it, a table has two columns: "Primary" and "Mailing Address".
- LICENSES:** A button labeled "+ Contractor License" is shown. Below it, a table header is visible with columns: "License Holder", "License Type", "License Number", "Expiration Date", and "Status".

A "Save" button is located at the bottom left of the form.

5. New window opens to confirm contractor information. If correct, select next.

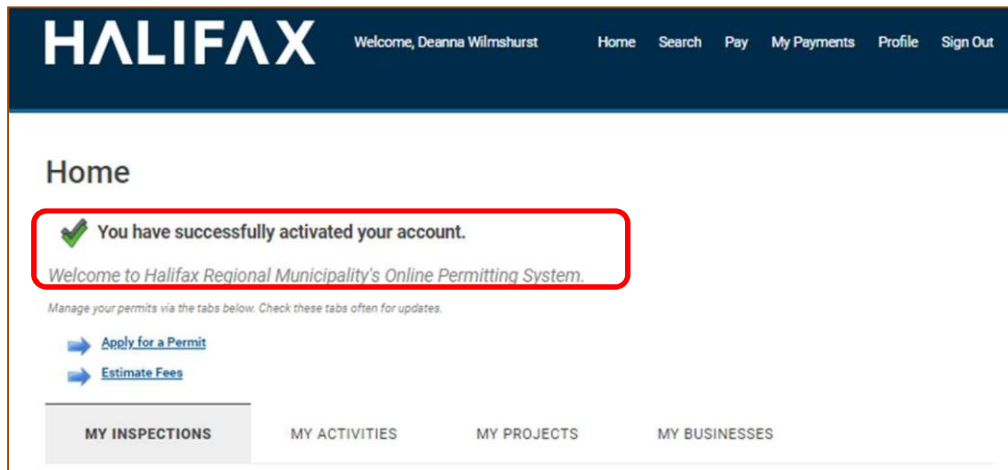
The screenshot shows a confirmation window titled "MY CONTRACTOR". It displays the following information:

- Update your contractor information
- Mighty Builders Inc dba Mighty Builders
- Phone: (902) 222-2222, No License Numbers

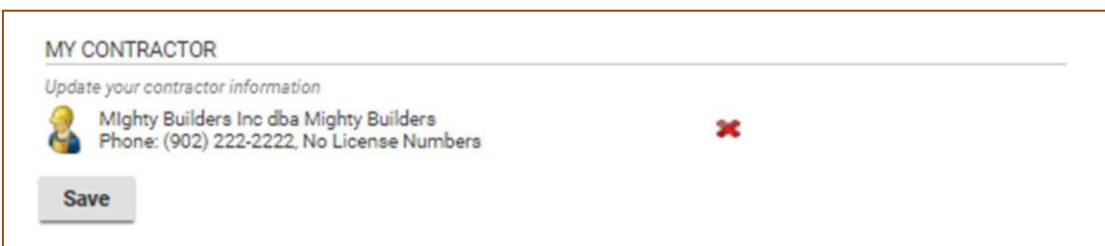
A red "x" icon is visible next to the phone number. At the bottom, there are two buttons: "Save" on the left and "Skip / Next" on the right.

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6. A second window will open asking about business association. This feature is not currently configured and unrelated to contractor profile. Select next.
7. You will be returned to the landing page and see the following message:



8. Your contractor profile is now active and you can manage the account from the 'My Contractor' section of your profile page.
 - Go to profile
 - Scroll to mycontractor section
 - Click on contractor icon to open your contractor profile management page



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Contractor Profile Manager

Because you are the initial registrant of the contractor company you have been granted privileges under the role of Contractor Profile Manager (CPM). You will see two tabs in your contractor profile: Details Tab and Associated Accounts Tab.

The screenshot displays the Contractor Profile Manager interface. At the top, there is a user icon and the title "Contractor". Below this, the contractor's name "Mighty Builders Inc dba Mighty Builders" and phone number "Phone: (902) 222-2222, No License Numbers" are shown. The interface has two tabs: "DETAILS" (selected) and "ASSOCIATED ACCOUNTS".

The "DETAILS" tab contains the following fields:

- *Business Name:** Mighty Builders Inc
- Doing Business As:** Mighty Builders
- Primary Phone Number:** (902) 222 - 2222
- Office Phone Number:** () -
- Cell Phone Number:** () -
- Fax Number:** () -
- Email Address:** elle.parker@yahoo.com
- PIN:** BP7-3AU-H6M. A "New PIN" button is next to it. A note states: "Use this PIN to allow other users to become associated with this contractor account."

Below the details are sections for "MAILING ADDRESS" and "LICENSES".

The "MAILING ADDRESS" section has a "+ Mailing Address" button and a table with columns "Primary" and "Mailing Address".

The "LICENSES" section has a "+ Contractor License" button and a table with columns "License Holder", "License Type", "License Number", "Expiration Date", and "Status".

A "Save" button is located at the bottom left of the form.

1. In the Details Tab you can edit your contractor profile information such as contact info and mailing address.

You can also manage the PIN for your organization. A PIN allows others to associate to the contractor account and apply for permits under the organization's name.

Contractors who associate to your company will not have access to manage the PIN unless they are given CPM rights.

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2. In the Associated Accounts Tab, as the CPM you will see all associated contractors. Associated contractors can apply for permits under the name of your organization.

From this tab the current CPM can assign the CPM role to other associated contractors.

Example: In the example below, Doris is the CPM for Little Builder Inc. as designated by the manager checkbox.

John is an associated contractor who was provided a PIN and associated with Little Builders Inc and is now capable of applying for permits on behalf of little builders.

John can also be given CPM rights if Doris checks the manager box beside his name.

The screenshot shows a web interface for managing contractors. At the top, there is a header for 'Contractor' with a profile icon, the name 'little builders Inc', and the phone number '(902) 444-5555, No License Numbers'. Below this are two tabs: 'DETAILS' and 'ASSOCIATED ACCOUNTS', with the latter being selected. The main content area displays a table of associated contractors. The table has a 'Manager' column with checkboxes and lock icons. Doris Fox is listed as the manager, with a checked box and a lock icon. John Spekkens is listed below her, with an unchecked box and a red 'X' icon. A 'Save' button is located at the bottom left of the table area.

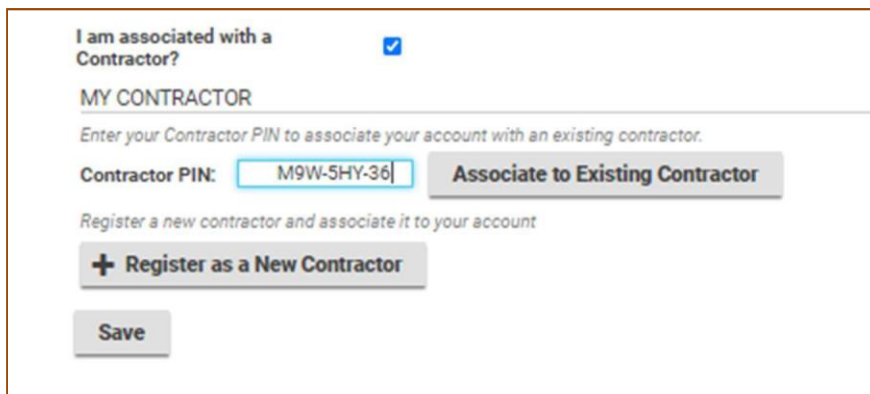
		Manager
	Doris Fox (902) 222-3333 - 456 IJ Street Halifax, NS B2T 1C3 Doris.Fox@Halifax.ca	<input checked="" type="checkbox"/>
	John Spekkens (902) 887-5621 - 951 Abby Road Halifax, NS B2T 1C3 John.Spekkens@Halifax.ca	<input type="checkbox"/>

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STEP 2 Option 2: Associate to an Existing Contractor

This option is typically used by employees of an organization provide a PIN from the person who manages the company's contractor profile.

1. To associate to an existing contractor (company) you must be provided a PIN by the CPM (person who manages the PIN).
2. Navigate to the 'My Contractor' section of the Profile Page within your Customer Portal account (see steps above).
3. Enter the PIN provided in the and click 'Associate to Existing Contractor'.



I am associated with a Contractor?

MY CONTRACTOR

Enter your Contractor PIN to associate your account with an existing contractor.

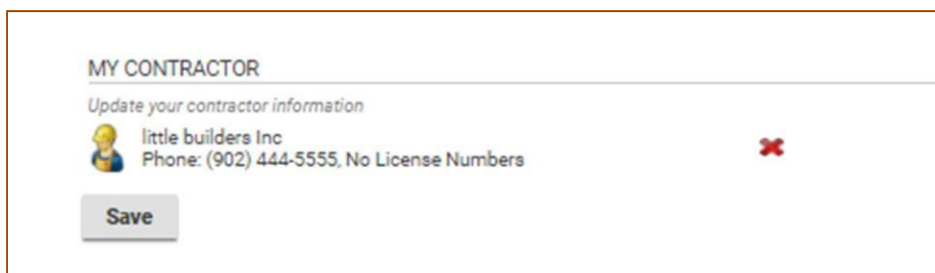
Contractor PIN: **Associate to Existing Contractor**

Register a new contractor and associate it to your account

+ Register as a New Contractor



Save

4. Your new Contractor Association will show immediately under My Contractor section of your profile. You can now apply for permits as a contractor under that company name.



MY CONTRACTOR

Update your contractor information

 little builders Inc
Phone: (902) 444-5555, No License Numbers 

Save

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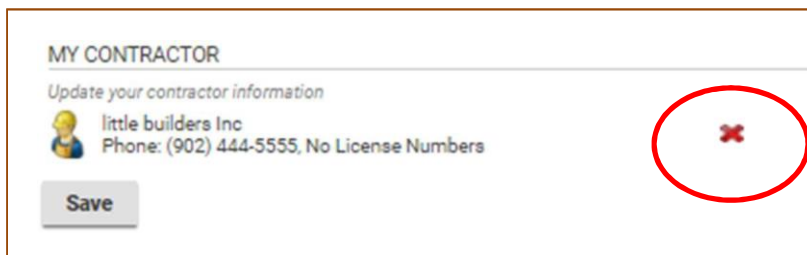
Disassociate a Contractor

An individual can only be associated with one contractor (company) at a time. Individuals can dissociate themselves, and CPM's can disassociate contractors if required.

Individual Disassociates


If an individual wants to disassociate they must:

1. Navigate to the 'My Contractor' section of the Profile Page.
2. Click the red X beside the contractor profile record




MY CONTRACTOR

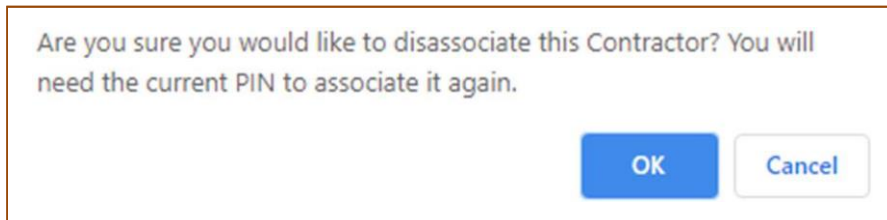
Update your contractor information

 little builders Inc
Phone: (902) 444-5555, No License Numbers

Save



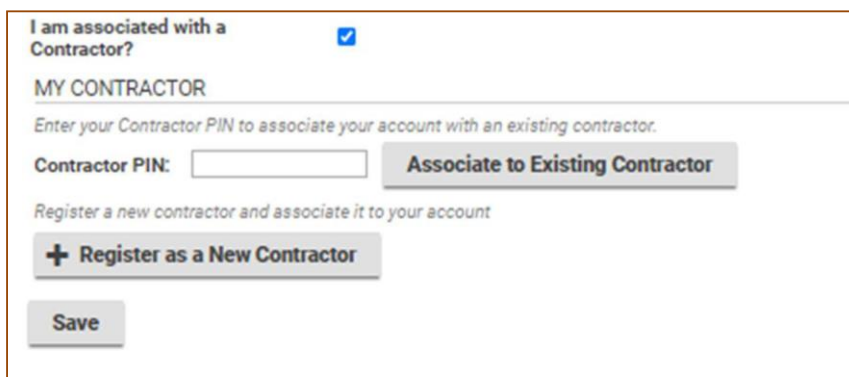
3. You will be prompted to confirm you want to continue to disassociate from the contractor.



Are you sure you would like to disassociate this Contractor? You will need the current PIN to associate it again.

OK Cancel

4. The 'My Contractor' section will return to create a future contractor profile.



I am associated with a Contractor?

MY CONTRACTOR

Enter your Contractor PIN to associate your account with an existing contractor.

Contractor PIN: Associate to Existing Contractor

Register a new contractor and associate it to your account

+ Register as a New Contractor

Save

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CPM Disassociates

If an organization needs to remove a contractor association, they must:

1. Inform the CPM
2. CPM navigates to 'My Contractor' profile - Associated Accounts Tab
3. Click the red X beside the contractor's name

The screenshot shows a contractor profile for 'little builders Inc' with phone number (902) 444-5555 and 'No License Numbers'. The 'ASSOCIATED ACCOUNTS' tab is active, displaying a list of users. Doris Fox is the manager, indicated by a checked box and a lock icon. John Spekkens is listed below with an unchecked box and a red X icon, which is highlighted by a red arrow. A 'Save' button is located at the bottom left of the list.

		Manager
	Doris Fox (902) 222-3333 - 456 IJ Street Halifax, NS B2T 1C3 Doris.Fox@Halifax.ca	<input checked="" type="checkbox"/>
	John Spekkens (902) 887-5621 - 951 Abby Road Halifax, NS B2T 1C3 John.Spekkens@Halifax.ca	<input type="checkbox"/>

4. You will be prompted to confirm the disassociation

Are you sure you would like to disassociate this user account?

5. In the **Details Tab** create a new PIN.
 - a. This prevents the employee from re-associating and continuing the apply for permits as a contractor under the company's name
 - b. Existing associated contractors will not be impacted.
 - c. New associated contractors will be provided the new PIN.

