# Building, Planning and Land Development Online Applications and Permits

# Customer Portal User-Guide

## Create a Contractor and Personal Identification Number (PIN)

Professionals, contractors, and companies who submit applications on a customer's behalf or wish to be linked or associated to submitted applications, are required to have a Customer account with My ServiceOttawa (MySO). Within this Customer account, a Professional/Contractor account can then be created or associated.

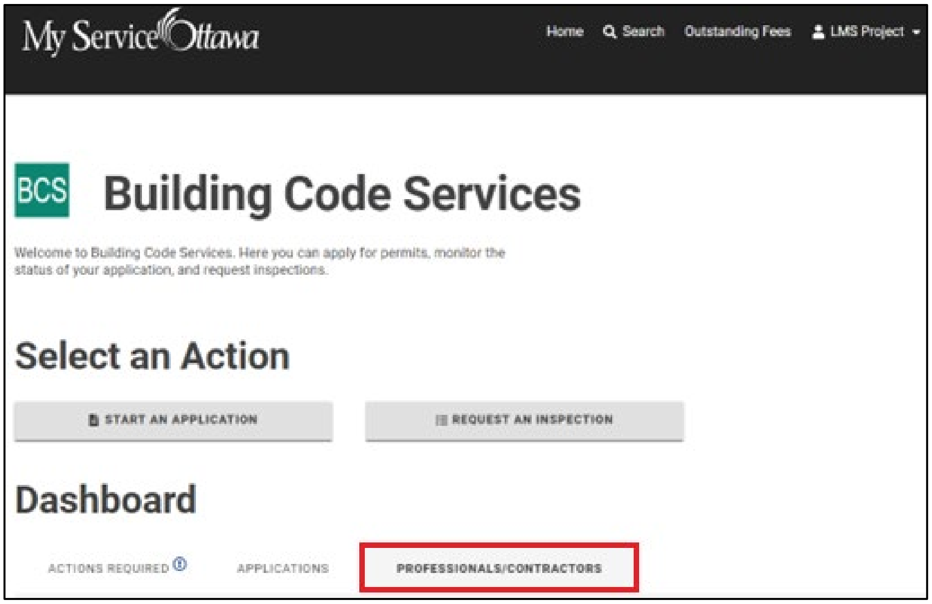
## Linking an Existing Professional/Contractor Account

Professional/Contractors who have previously submitted or currently have active applications, will be receiving a notice from the City of Ottawa containing a Professional/Contractor PIN. This number can be used to link your Customer portal account to an existing Professional/Contractor account, allowing you to access all previous applications. If you have done business with Building Code services in the past but did not receive a PIN, please contact LMS_Support@ottawa.ca

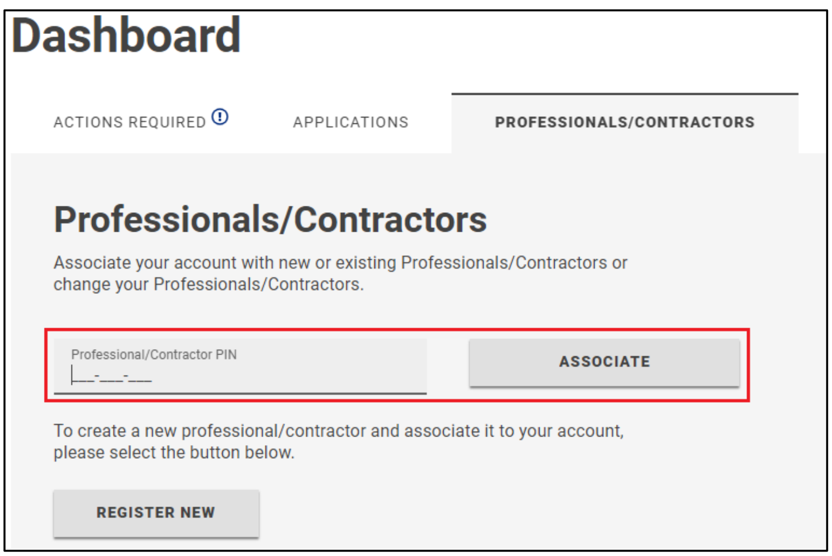
To link to your existing Professional/Contractor account using the provided PIN,

1. Login to your Customer Account within My ServiceOttawa (MySO).

2. Select the **“Professionals/Contractors”** tab on the main Dashboard page.




3. Enter the unique PIN provided in the **“Professional/Contractor PIN”** field and select the **“Associate”** button.




The account has now been linked and associated to your Customer account.

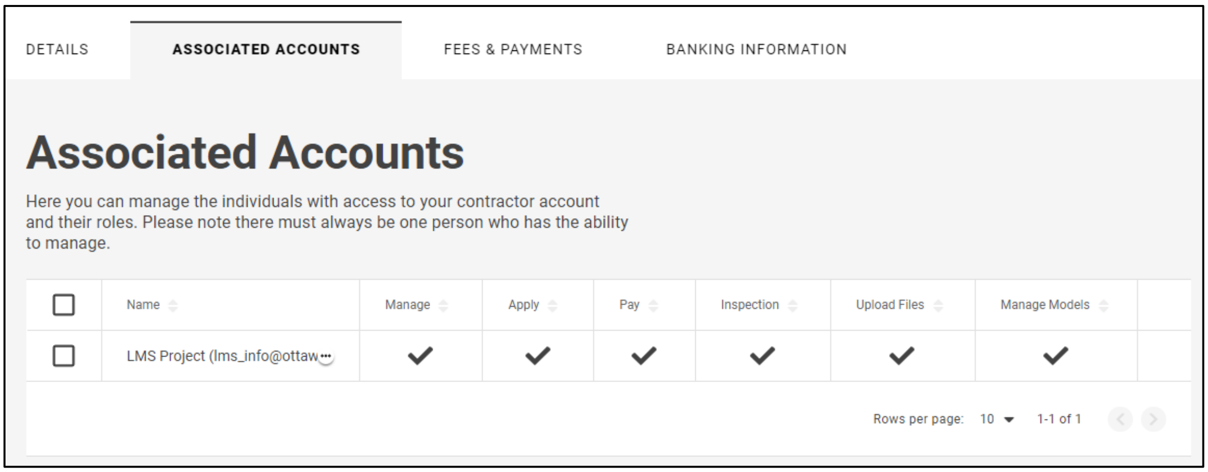
To view the account,

1. Select the **“Professional/Contractors”** tab from the main Dashboard.

2. Select the **“Business Name”** listed in the grid.

3. Select the **“Associated Accounts”** tab. The Professional/Contractor account will be shown, with all permissions checked off, providing you with the full manager role.

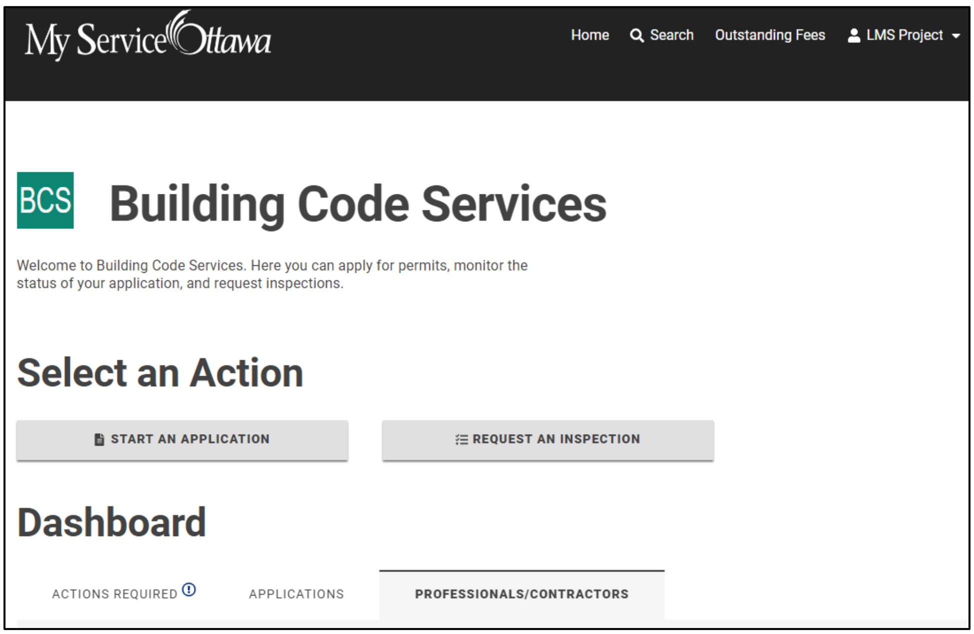
   Note: As the user initiating the Professional/Contractor account, you will act as the Manager of the account. There must always be a Manager for any Professional/Contractor Account.



# Creating a New Professional/Contractor Account and Generating a PIN

All Customers can create Professional/Contactor accounts from their Customer Accounts. Creating a Professional/Contractor account will generate a unique PIN number which companies can share with their employees.

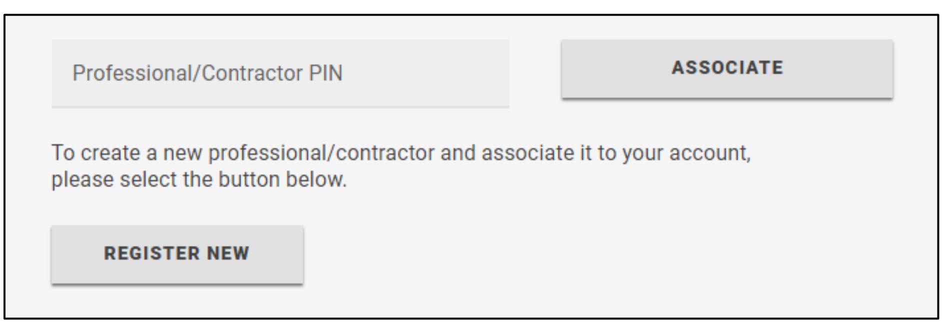
1. To begin, locate the "**Professionals/Contractors**" tab on the main Dashboard page.



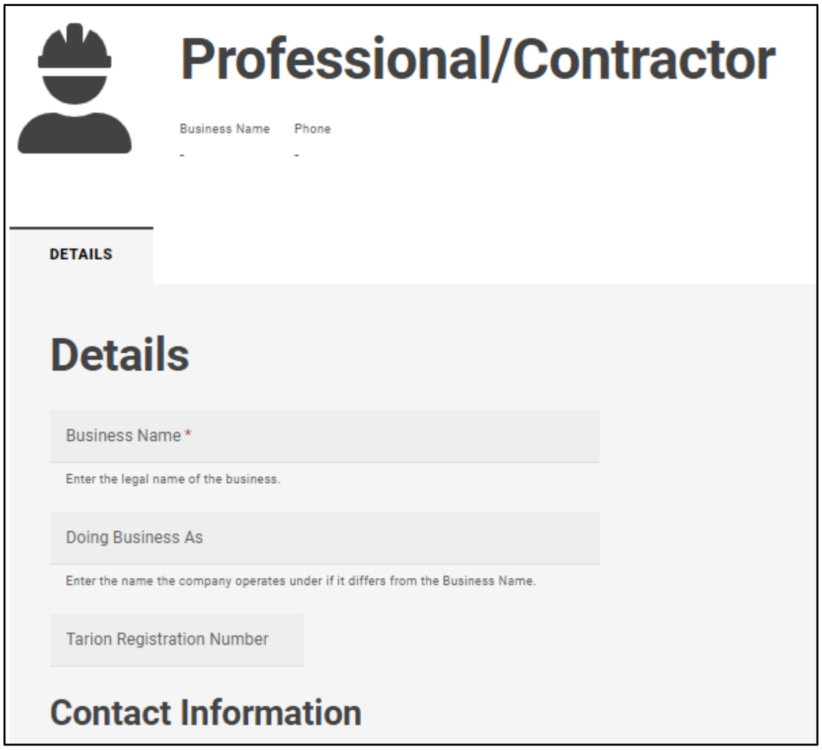

2. There will be options to:

   a. **"Associate"** your account with an existing Professional/Contractor via a PIN provided by a company or,

   b. **"Register"** as a new Professional/Contractor to your own account.

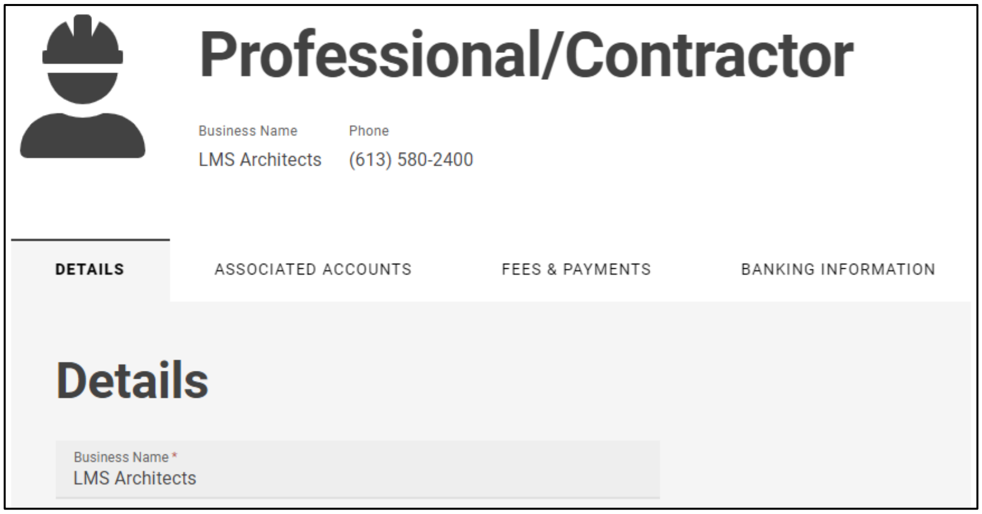


3. Select the “**Register New”** button. A new “**Details**” page will open where information will need to be completed. Mandatory fields are noted by a red asterisk (*).

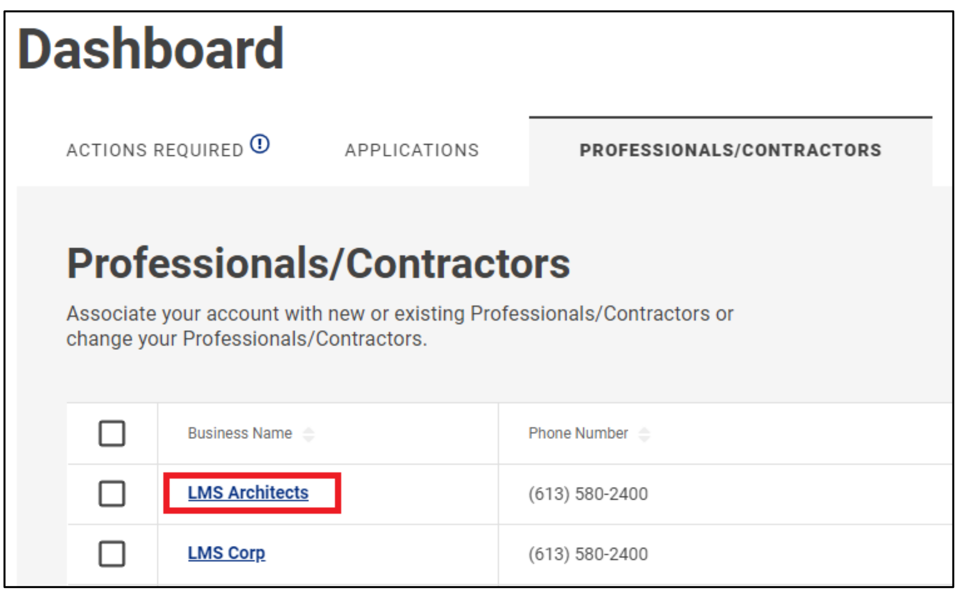



4. Complete all fields in the Details, Contact Information and Mailing Address sections and select the “**Save”** button.

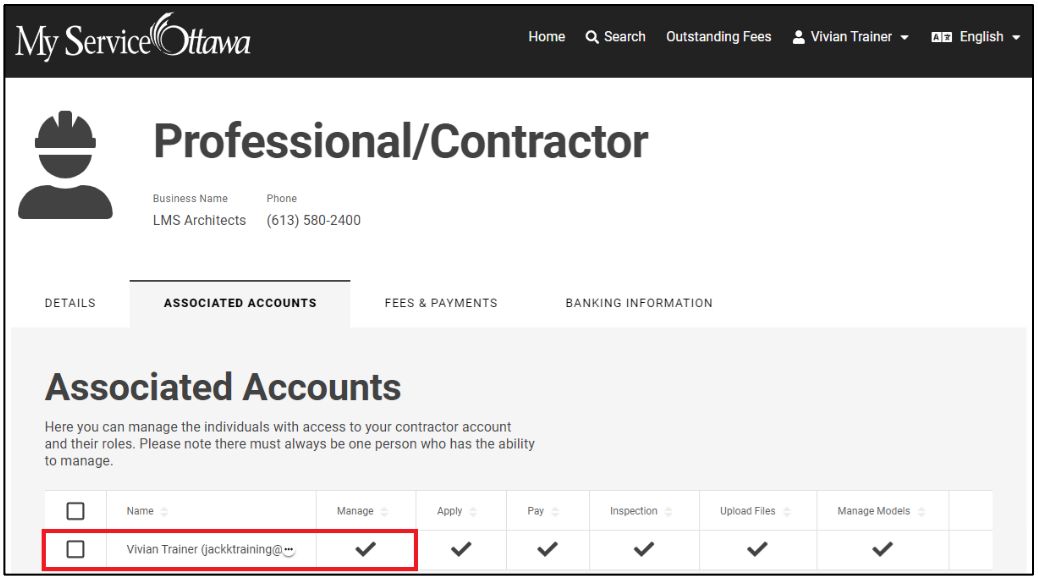
5. Upon saving, three new tabs will be available for the new Professional/Contractor where information can be stored and managed.




6. The registered Business will now appear in the Professionals/Contractors tab on the main Dashboard. To access the business profile and the related tabs, select the blue hyperlinked name under the “**Business Name**” column.



7. Within the **Associated Accounts** tab, you, the customer, will be identified as the Manager for this contractor account. The **Manage** role will have all other permissions enabled automatically.




The various permissions are:

The **"Apply"** role provides access to Permit Application Review actions such as submitting an application or communicating with staff regarding permit review issues.

The **"Pay"** role will allow the user to manage payment accounts and make payments.

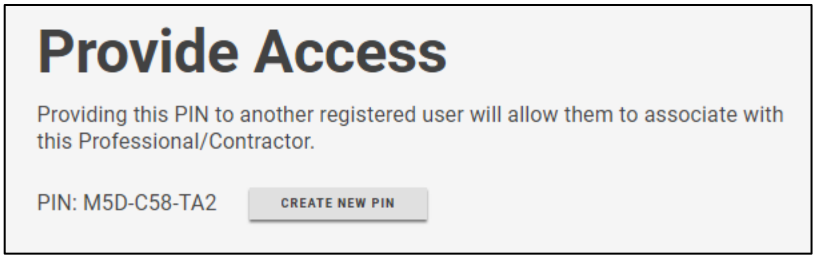
The **"Inspections"** role will allow the user to request inspections.

The **"Upload Files"** role will allow users to add documents to the application or permit.

The **"Manage"** role allows the user to complete all actions on behalf of the Professional/Contractor.

On initial set up, only the person who created the Professional/Contractor account will be listed as an Associated Account and they will automatically be given the "Manage" role.

8. Under the “**Provide Access”** section, the unique **PIN** is stored, which was created for this Professional/Contractor upon registration.



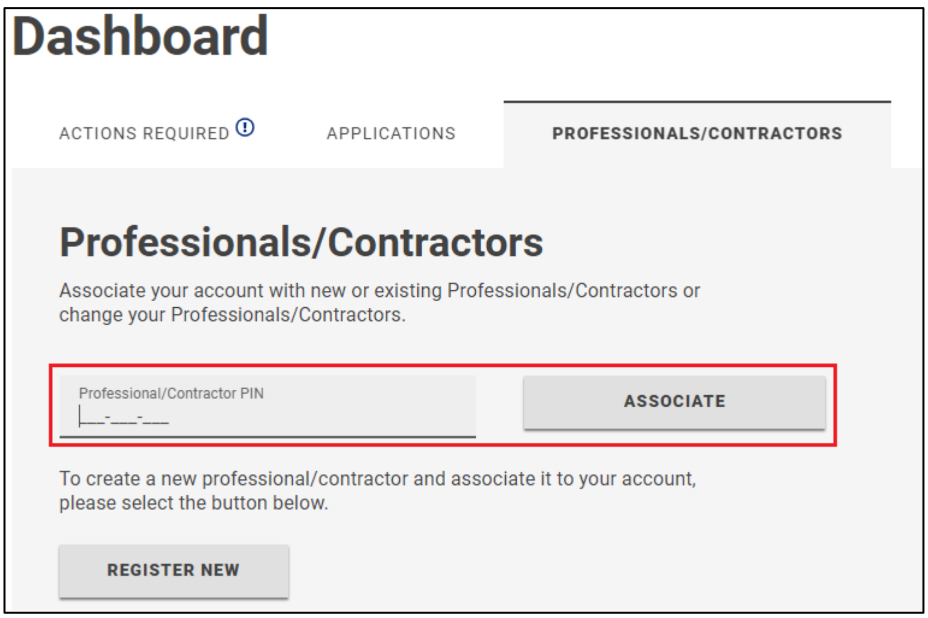

This PIN may be shared with Customers who will be submitting, paying, uploading documents, or requesting inspections on behalf of the Professional/Contractor.

# Adding Associated Accounts

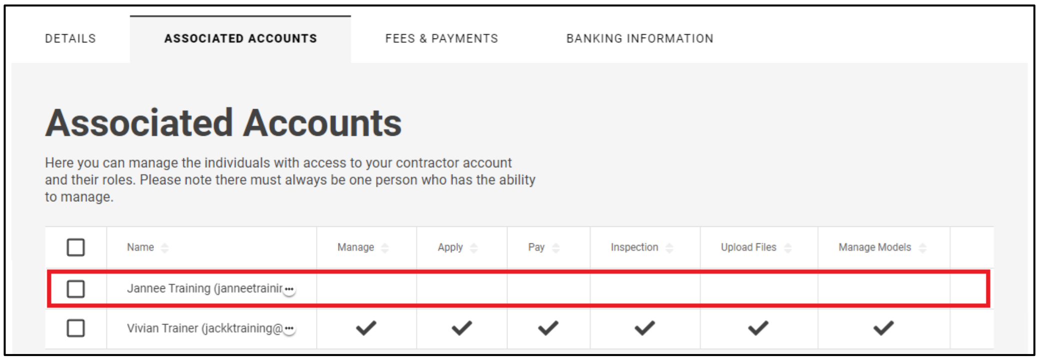
Now that you have created your Contractor account and generated your PIN, Customers can add your company as a contact on their application. To have other Customers associated to your professional/Contractor account, share the unique PIN number with them.

The Customer will then,

1. Login to their own Customer Account with My ServiceOttawa (MySO).
2. Select the **"Professionals/Contractors"** tab.
3. Enter the unique PIN in the "**Professional/Contractor PIN**" field and select the "**Associate**" button.



4. Once a customer has used your **PIN** and associated their account, they will be listed in the Associated Accounts tab of your contractor account. Initially, they will have no permissions until the Manager assigns them, by selecting the appropriate permission buttons.




5. Customers and permissions can be removed within the Associate Accounts tab by any user with the **"Manage"** role, by selecting the checkbox to the left of the Name column. A number of permission buttons will appear, including the option to fully remove the Customer from the Professional/Contractor account.