Natural Resource Online Services Account Settings

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1. Introduction

The following guide will provide an overview of the Account Settings in the Natural Resource Online Services Portal. ***Please note: The 'Manage Your Agent Access' is a separate guide and can be found under the Tools and Resources section of your Dashboard.***

1.1. Account Settings Overview

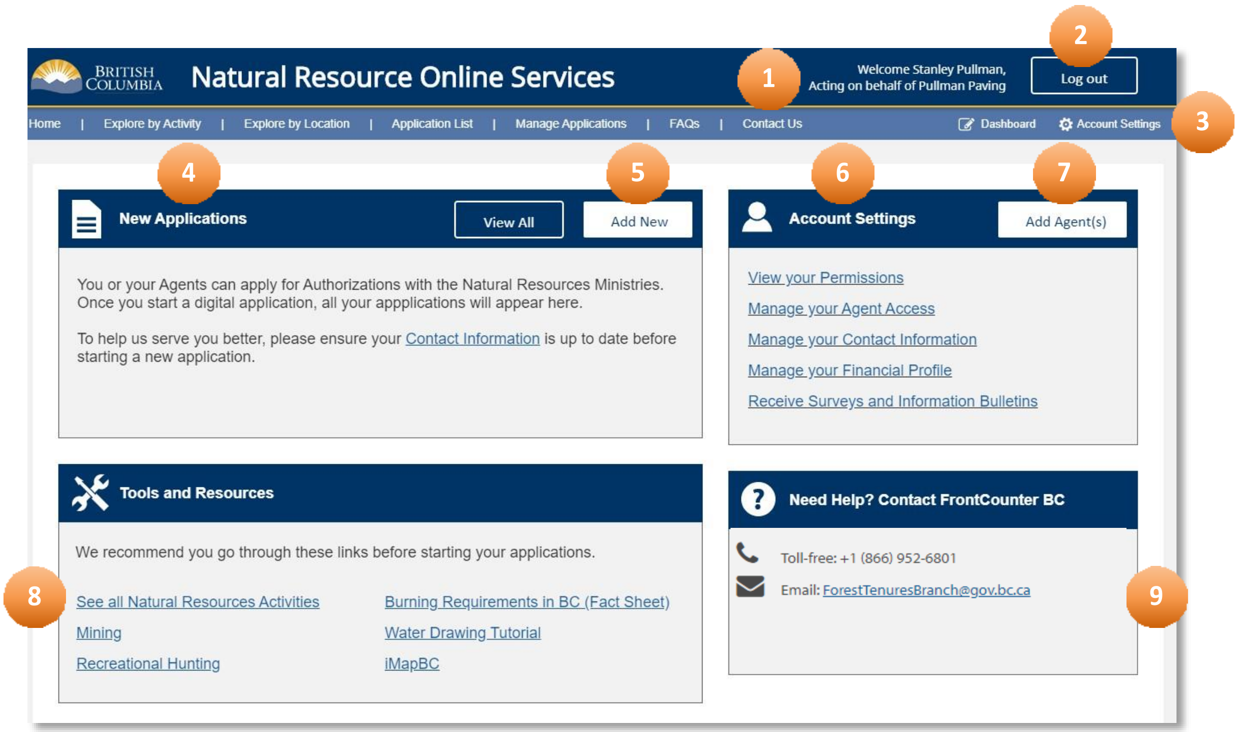
There are five areas in the Account Settings section. Click one of the links below to go directly to that section in the guide.

1. View your Permissions
    - There is where you can view what permission status you have been granted. The two permission statuses are:
        - **Client Manager:**
            - has the same access as the owner of the account and can add and change access to any users under the account
            - can access all applications that are supplied for the client
        - **Client Representative**:
            - has no ability to invite others
            - can only access applications that they created
2. Manage Your Agent Access (separate guide)
3. Manage Your Contact Information
    - This is where you can add additional contact information for the account. (Must have Client Manager status)
4. Manage Your Financial Profiles
    - This is where you can add finance and billing information to the account. There must be at least one billing account added to NR Online Services in order to pay for applications online. (Must have Client Manager status)
5. Receive Surveys and Information Bulletins
    - This is where you can opt in and out of receiving surveys and information bulletins from the Natural Resource Ministries.

2. NR Online Services Dashboard Overview

Log onto **NR Online Services** with a **BCeID**.

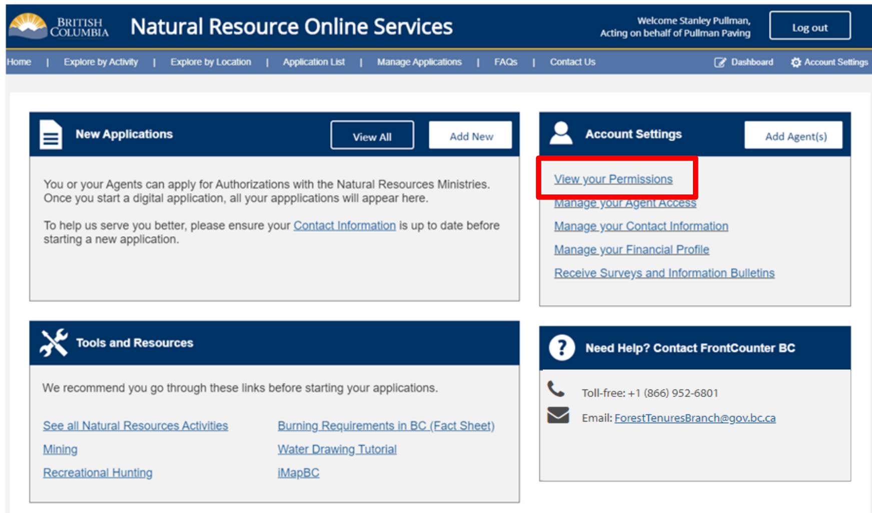
You will be taken to the **NR Online Services Dashboard**.



1. **Account Name:** The name of the NR Online Services account associated with the BCeID sign in credentials
2. **Log Out**: Click to log out of NR Online Services
3. **Dashboard and Account Settings links**: These are visible on all pages of NR Online Services
4. **New Applications**: A list of the most recent applications submitted through NR Online Services. If you have not submitted an application yet, some guidance will be displayed here.
5. **Add New Application**: Click to start a new application through NR Online Services
6. **Account Settings**: This area is where you can view permissions, manage agents, contact information and financial profile
7. **Add New Agent(s):** Click to add a new representative to act on the client's behalf
8. **Tools and Resources**: A list of helpful links to Natural Resource information and activities
9. **Need Help?:** Contact information for FrontCounter BC

3. View Your Permissions

On the Dashboard, click the **View your Permissions** link in the **Account Settings** panel.



On the **What can I do on behalf of the client?** page it will show what permissions you have been granted.

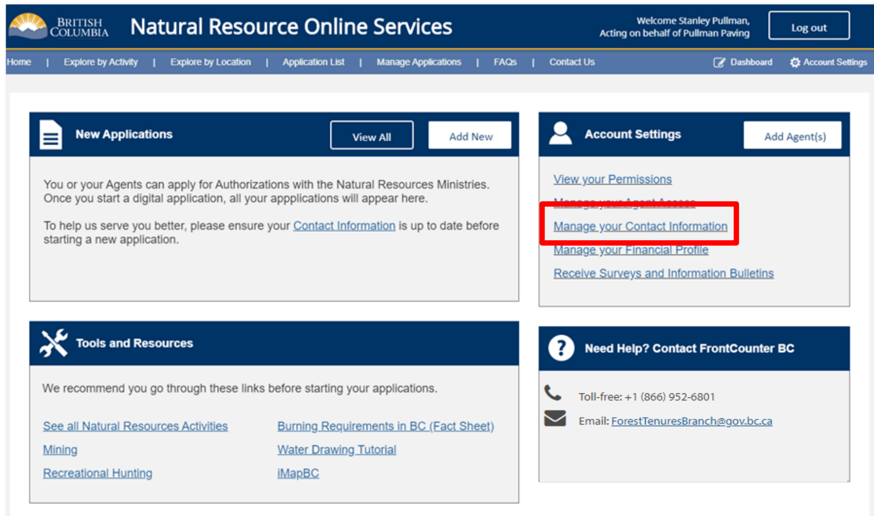
What can I do on behalf of the client?

The table below describes your current permissions.

Permission	Description
Client Manager	With this permission a user can manager all aspects of their profile. A Client Manager can invite new client representatives, manage permissions for client representatives and delegate the Client Manager role to other representatives. A Client Manager also has all the same permissions as the Client Representative role.
	OR
Client Representative	A Client Representative is invited by the Client Manager to act on behalf of a business owner. By default they can perform all the activities related to submitting and managing applications.

4. Manage Your Contact Information

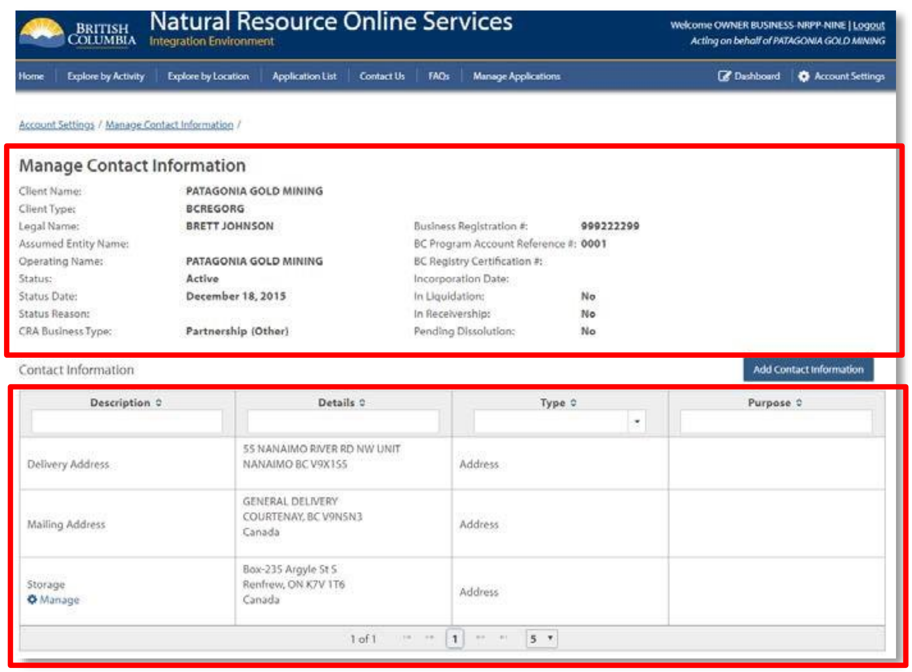
On the dashboard, click the **Manage your Contact Information** link in the **Account Settings** panel.



The **Manage Contact Information** page is split into two sections.

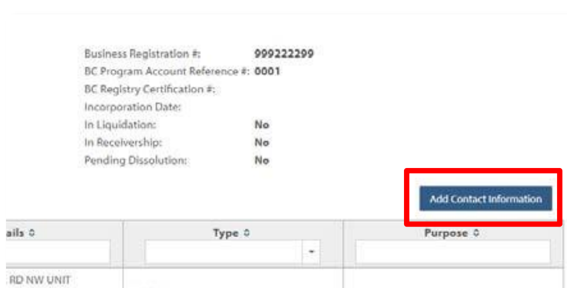
The top section is information that is pulled from BCeID. This information cannot be modified on NR Online Services. If information needs to be updated, it must be done on the BCeID account, which will then reflect in NR Online Services.

The bottom section is where additional contact information can be entered and managed. Only information which is added in NR Online Services can be edited here.



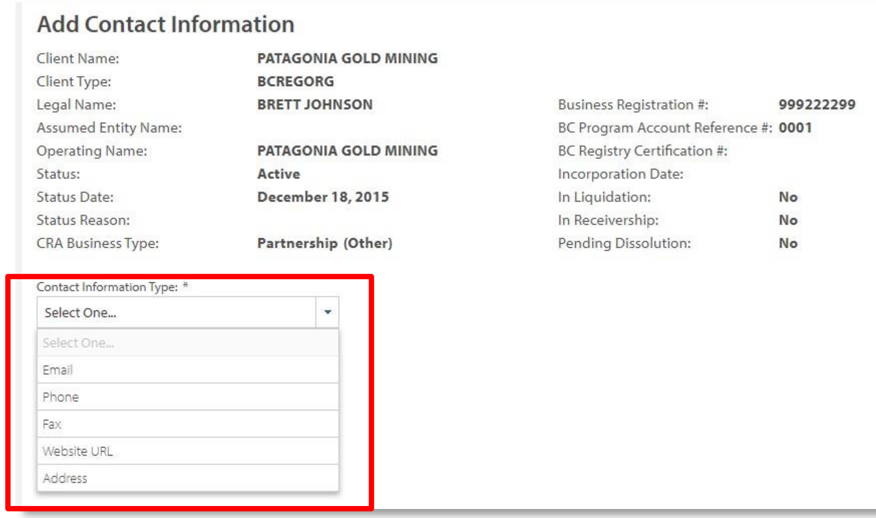
<u>Adding Contact Information</u>

Click the **Add Contact Information** button.



Choose the **Contact Information Type** from the drop down.

The following example will show how to add an address to NR Online Services. All contact information will be added and edited in the same manner.



Enter a description into the **Description** field.

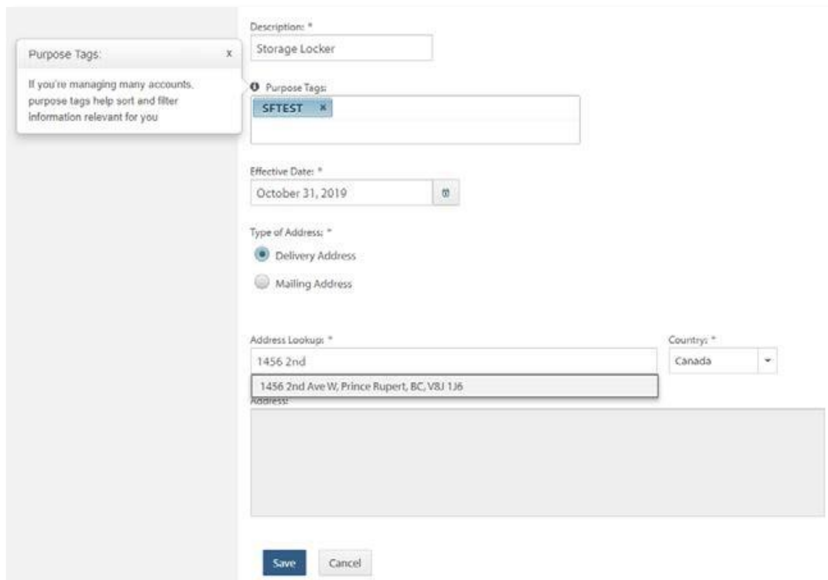
Enter the **Purpose Tags**, or words that will help filter information.

Using the calendar icon, enter the **Effective Date**.

Select the **Type of Address.**

Begin typing the address in the **Address Lookup** field. Canada post will automatically bring up addresses that match what is entered.

Click **Save.**

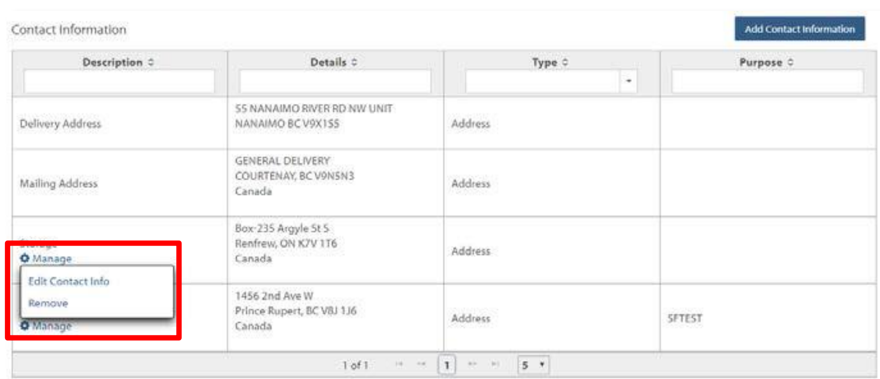


<u>Editing Contact Information</u>

Click the **Manage** link under the Description in the first column.

In the pop up that appears, choose **Edit Contact Info.**

To delete the contact information entirely, select **Remove**.



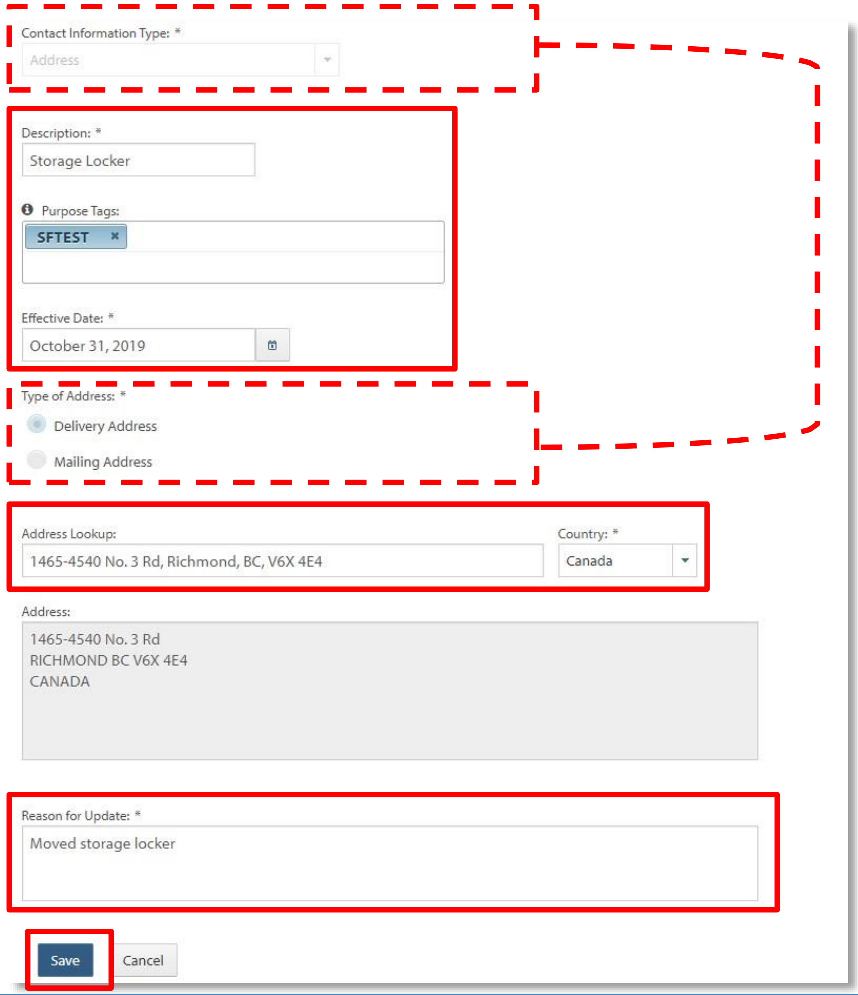
On the **Modify Contact Information** page, the **Contact Information Type** and the **Type of Address** cannot be modified. To modify these, the address would have to be removed and then added back in with the corrections.

The **Description**, **Purpose Tags** and the **Effective Date** can be modified.

Use the **Address Lookup** to enter the new address.

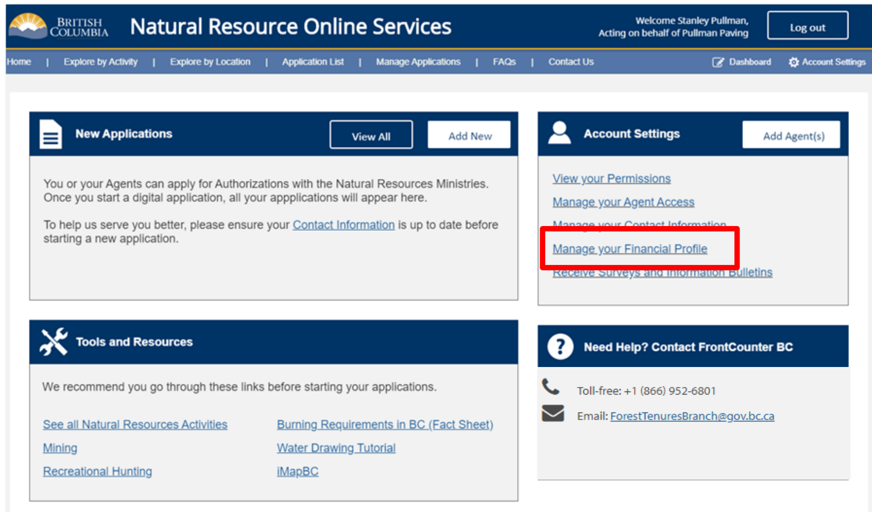
Enter a reason for the update.

Click **Save.**



5. Manage Your Financial Profiles

On the dashboard, click the **Manage your Financial Profile** link in the **Account Settings** panel.



Adding a Billing Account

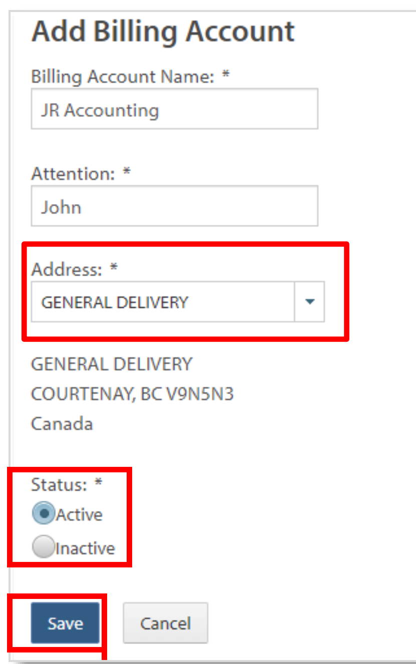
On the **Manage Finance Profile and Billing Accounts page,** click the **Add Billing Account** button.

On the **Add Billing Account** page, enter the **Billing Account Name** and **Attention** to.

Select an **Address** from the drop-down list.

Select the account as **Active**.

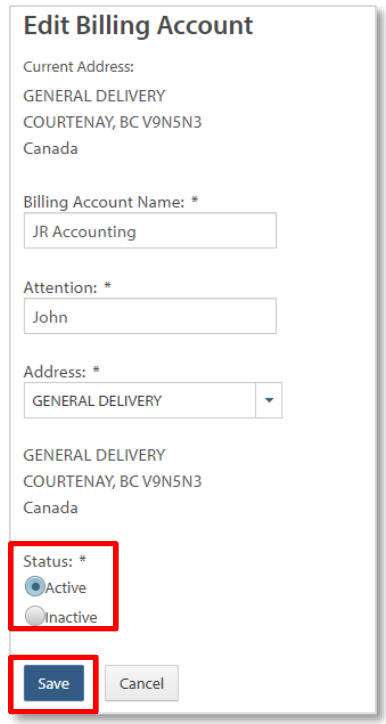
Click **Save**.



Modifying or Inactivate a Billing Account

On the Manage Finance Profile and Billing Accounts page, click the **Manage** link under the account to be modified.

On the **Edit Billing Account**, make the changes as required.

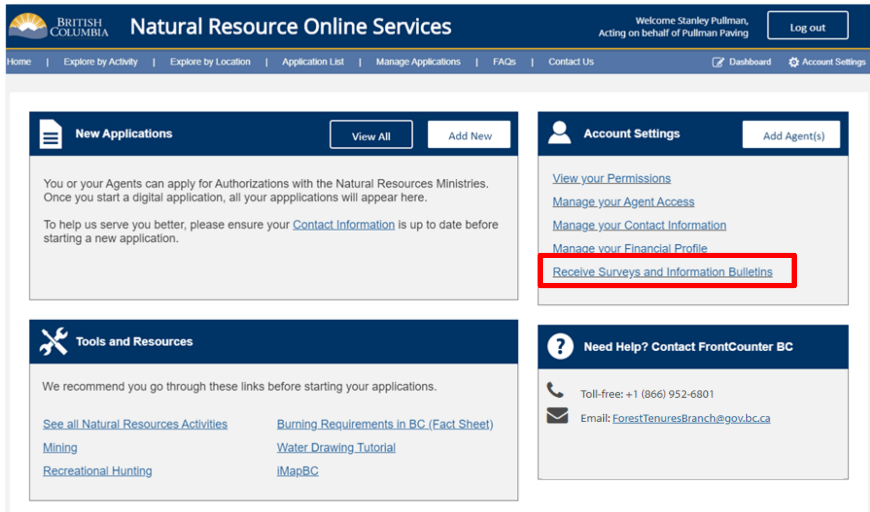


To inactivate the account, select the **Inactive** button.

Click **Save**.

6. Receive Surveys and Information Bulletins

On the dashboard, click the **Receive Surveys and Information Bulletins** link in the **Account Settings** panel.



To receive Survey's and Information Bulletins from the Natural Resource Ministries, check the **Opt-in** boxes.