



**Corporate Registry
Administrator's Guide**

Date: March 2023



Disclaimer

Materials in this document are for demonstration purposes only. The characters and events depicted are fictional. Any similarity to real events or persons (whether living or deceased) is unintentional.

Transaction forms can change from time to time. Although we do everything we can to ensure transactions are processed in a timely way, use of outdated forms may result in delays or incomplete transactions. Using the most up-to-date form will help ensure your transactions are processed without delay.

Visit the ISC website to access the most recent versions of the forms. ISC does not accept responsibility for any losses resulting from the use of outdated forms.

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Revision History

Version	Revision Date	Summary of Changes	Pages Changed
1.0	27 July 2016	Creation	All
2.0	12 Mar 2023	Updated to reflect changes associated with new Business and Non-profit Corporations Acts and Regulations	All



Formatting Note

In this manual, underlining is used to emphasize important points.

Bold type is used to identify key terms the first time they appear in the manual. It is also used for:

- The names of documents. The titles of standardized documents, such as forms, are capitalized as well as bolded.
- Computer applications.
- Specific screens, screen sections, buttons, menus, menu options and fields in those applications.

Italics are used for the titles of acts and regulations.

[Green text](#) is used for cross-references. If you are using a PDF version of this document, you can click on this text to go directly to the page number or section indicated.



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Getting Started

If you are the **Administrator** for your company this means you have administrative capabilities that allow you to manage your users and account(s) effectively including:

Account management

- Determine which payment account is linked to this Corporate Registry account
 - This requires an account password
- Determine which users can charge to this account
- Change Account owner

User management

- Determine who gets access to use your account
 - Add or remove Users and control their privileges
 - Administrator
 - Create Submission
 - Submit Submission
 - Charge Account
 - Control and manage user access
 - Including creating and re-setting passwords

Key Points

- Most offices will identify at least 2 administrators to ensure there is always a backup in the office
- The most common account and user management needs can be resolved by an Administrator in your office, without requiring you to contact ISC.
- Administrators can view all submissions, document orders and any messages for all users working in the account





Logging in to Corporate Registry

To start:

1. Go to <https://corporateregistry.isc.ca/>
2. Enter your username and password.

3. Click **Login**. Your **dashboard** will display.

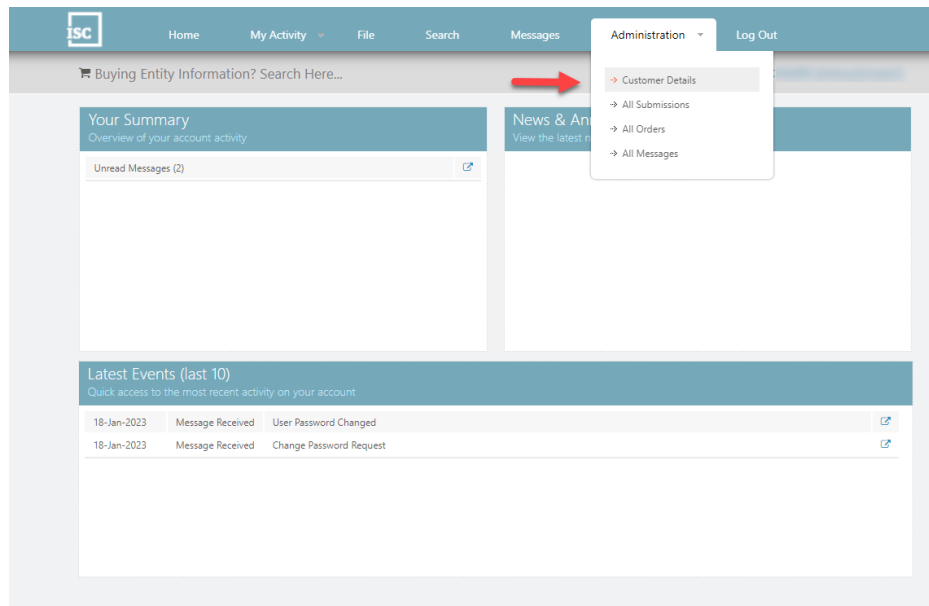




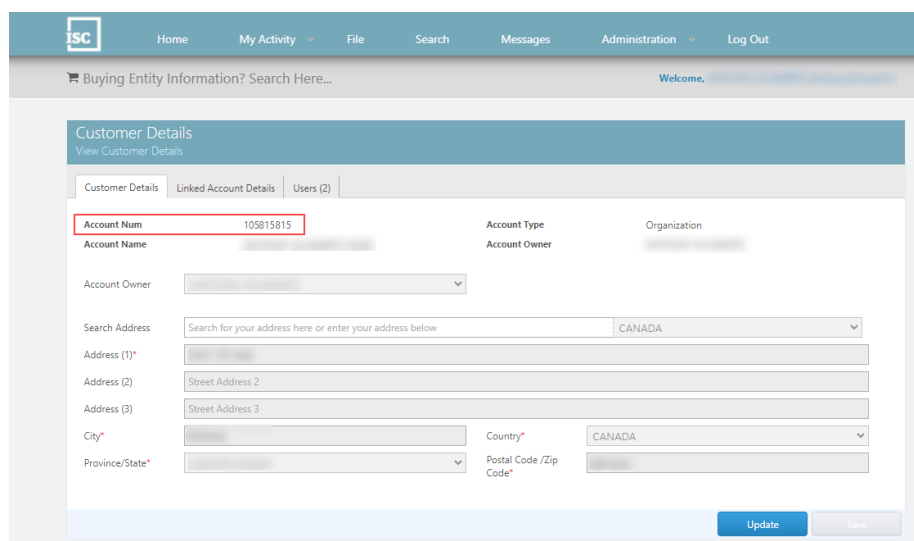
Account Management

One of the first things an Administrator should verify is that the account being charged is correct.

1. Click the **Administration** menu.



2. Click **Customer Details** and verify your account number.





3. Click **Linked Account Details**.

The screenshot shows the ISC Customer Details page. The navigation bar includes Home, My Activity, File, Search, Messages, Administration, and Log Out. Below the navigation bar is a search bar with the text "Buying Entity Information? Search Here..." and a "Welcome" message. The main content area is titled "Customer Details" and has a sub-header "View Customer Details". There are three tabs: "Customer Details", "Linked Account Details", and "Users (2)". The "Linked Account Details" tab is selected, and a red arrow points to it. The account information displayed is: Account Num: 105815815, Account Balance: \$ 0, and Address: [Redacted]. At the bottom right, there are two buttons: "Add Funds" and "Change Account".

4. To add funds to your account balance, click **Add Funds**.

This screenshot is identical to the previous one, but with a red arrow pointing to the "Add Funds" button at the bottom right of the page. The "Account Balance" field is also highlighted with a red box.

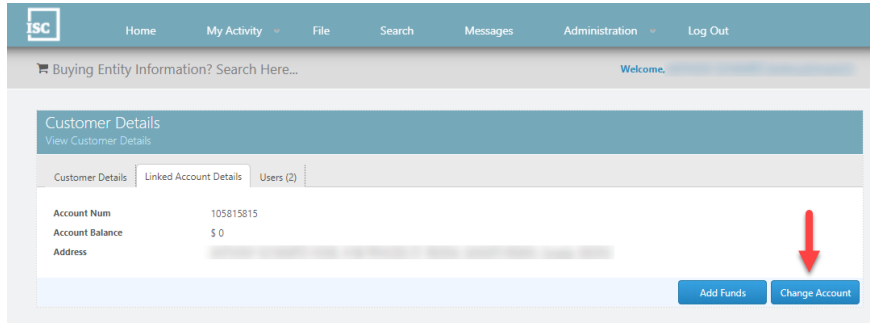
5. Remit Payment

The screenshot shows the "Add Funds" modal form. It has a title bar with the text "Add Funds" and a close button. The form contains the following fields: "Name on Card" (text input), "Card Type" (dropdown menu with "Select Card" selected), "Card Number" (text input), "Expiry Date" (two dropdown menus, the first with "February (2)" and the second with "2023"), "Security Code" (text input), and "Top Up" (text input with "\$0,000" entered). Below the fields are logos for VISA and MasterCard. At the bottom right, there is a "Make Payment" button.





6. To change the payment account linked to your user profile, click **Change Account**. A new window will appear.



7. Input new account number and password.

If you want to change the billing account and don't know your account number or password, contact ISC.



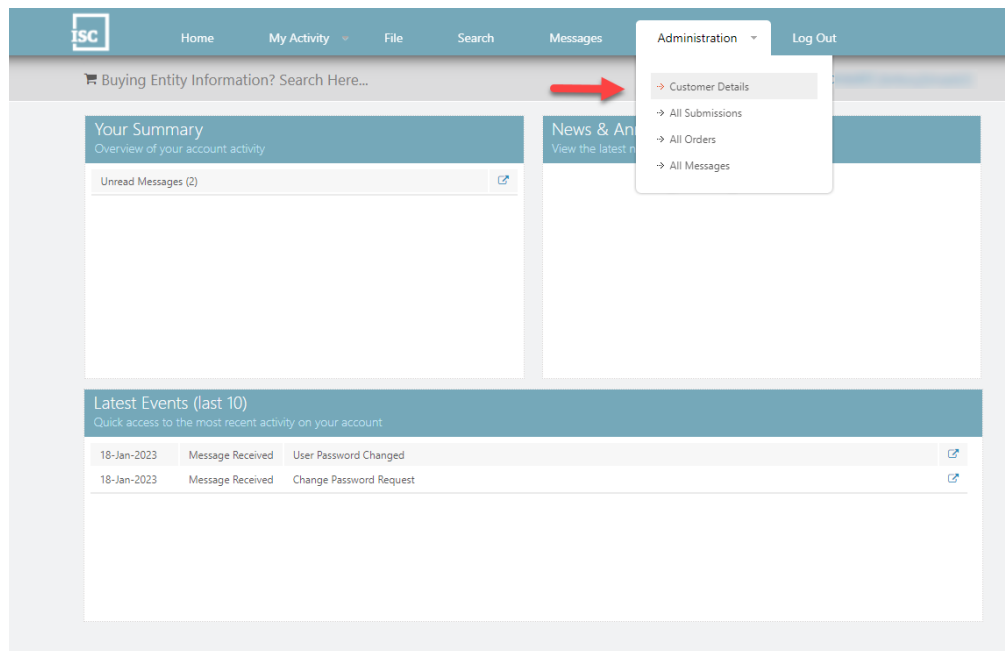


User Management

As an administrator you determine who gets access to use your account as well as the type of access for each user. Administrators can also create and reset passwords for any other users associated with this account. You can view, add, delete or modify existing users associated with this account.

The **Manage User's Profile Details** screen is used to setup a new user and modify an existing user with the following information:

1. Click the **Administration** menu and select **Customer Details**.





- To view, add, delete or modify existing users associated with this account
Click **Users**.

The screenshot shows the ISC Customer Details page. The navigation bar includes Home, My Activity, File, Search, Messages, Administration, and Log Out. Below the navigation bar is a search bar for buying entity information and a welcome message. The main content area is titled "Customer Details" and has three tabs: Customer Details, Linked Account Details, and Users (2). A red arrow points to the Users (2) tab. Below the tabs is a table with columns for User Name, Name, Email, and Active. There are also filter and action buttons. An "Add" button is located at the bottom right of the table area.

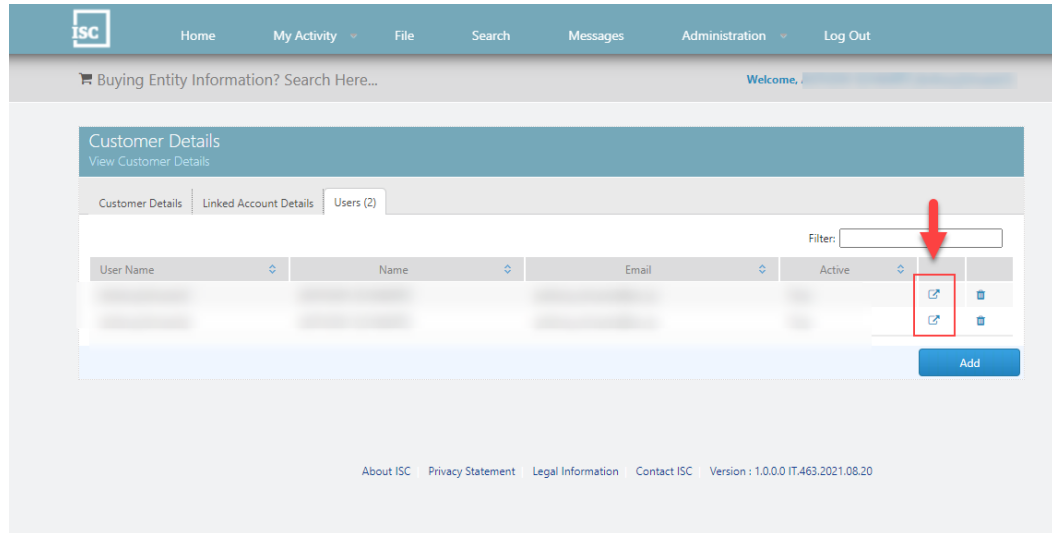
- To add a user, click **Add**.

This screenshot is identical to the previous one, but with a red arrow pointing to the "Add" button at the bottom right of the table area.





4. To modify a user, click the **Modify** icon  beside the user's name.



Once you've clicked to add or modify a user, you will see the following screen which allows you to complete any of the following user administration activities:

- Create or edit a username
- Create or edit a user's password
- Change Status of a user from Active to Inactive
- Add a client number
- Enter Contact Details
- Change user privileges
 - Administrator
 - Setup a user with administrator privileges
 - Create Submission
 - Allow a user to create a submission
 - Submit Submission
 - Allow a user to create and submit a submission
 - Charge Account





- Allow a user to charge to a billing account

ISC Home My Activity File Search Messages Administration Log Out

Buying Entity Information? Search Here... Welcome,

Customer User Profile

Manage User's Profile Details

User Profile

User Name* First Name*

Last Name* Password* 8-16 long, 1 upper & 1 lower case, 1 number, 1 of !@\$*

Confirm Password*

Status* Active Inactive

Do you have an existing client number?

Password: Must be 8 to 16 characters and must contain at least one upper case character (A-Z), one lower case character (a-z), one number (0-9), and one of the following special characters !@\$*

Contact Details

Email* Phone (xxx)xxx-xxxx

Mobile Fax (xxx)xxx-xxxx

Privileges

Administrator Charge Account

Create Submission Submit Submission

Cancel Save Details

5. Once you've entered all relevant information on the "Manage User's Profile Details" form (pictured above), click **Save Details**

Note – items with an asterisk are required fields.

6. To delete a user, click the Remove icon  beside the user's name.





ISC Home My Activity File Search Messages Administration Log Out

Buying Entity Information? Search Here... Welcome, [User Name]

Customer Details

View Customer Details

Customer Details | Linked Account Details | Users (2)

Filter:

User Name	Name	Email	Active	
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

[Add](#)

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