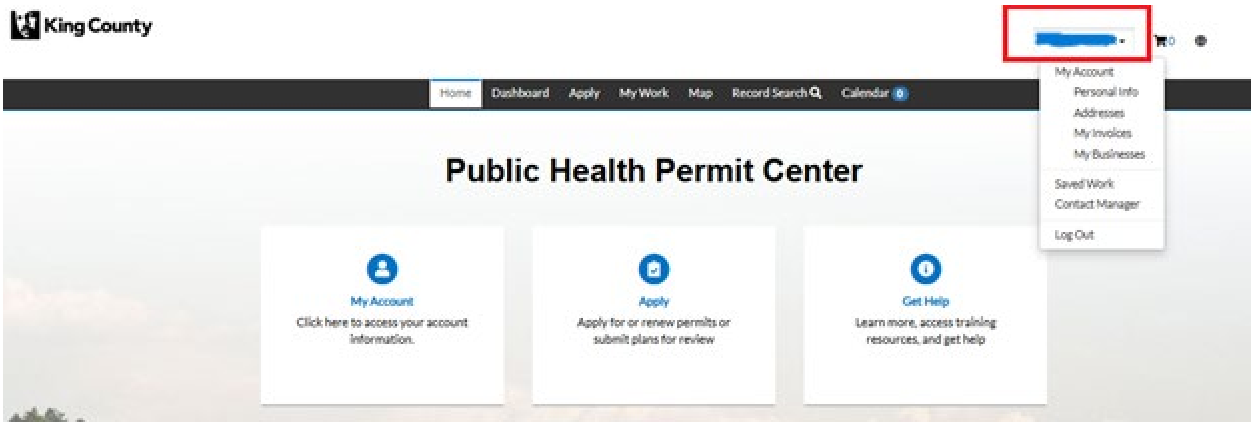
How to View and Change your Account Information

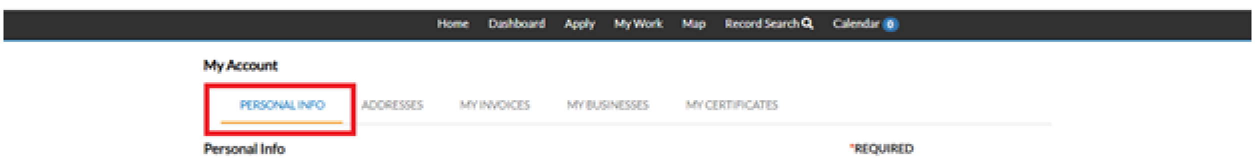
Once logged in, select your name in the upper right corner of the screen and select **“My Account”** (the first option in the drop-down menu) or the relevant option.



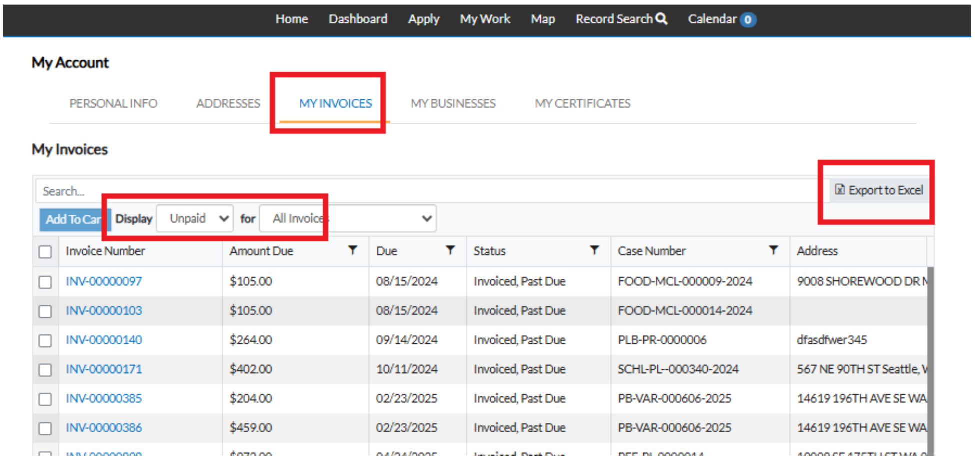
My Account

Your account is organized into several tabs, each containing specific information:

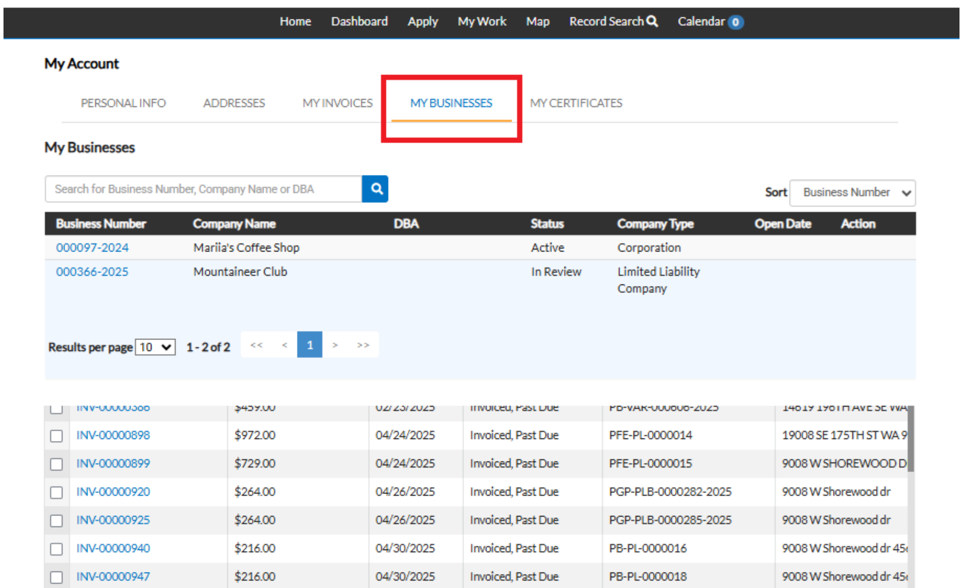
- **Personal Info**: Personal account details such as name, phone numbers, and email address.



- **Addresses**: The address information used in your applications.
- **My Invoices**: A list of all your invoices.
  - Use the **"Display"** and **"For"** filters to sort or narrow the list.
  - Select **"Export to Excel"** to download the invoice data as an Excel spreadsheet.



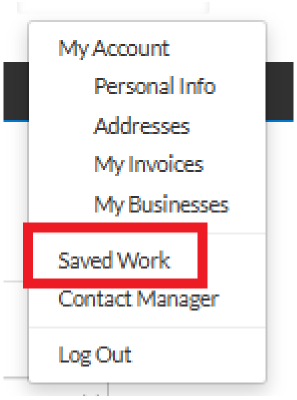
- **My Businesses**: All businesses associated with your account.
    - When submitting a permit application for the first time, you can add a new business.
    - If a business is already linked to your account, you can select it from the list.



- **My Certificates**: All certificates currently issued to your account.

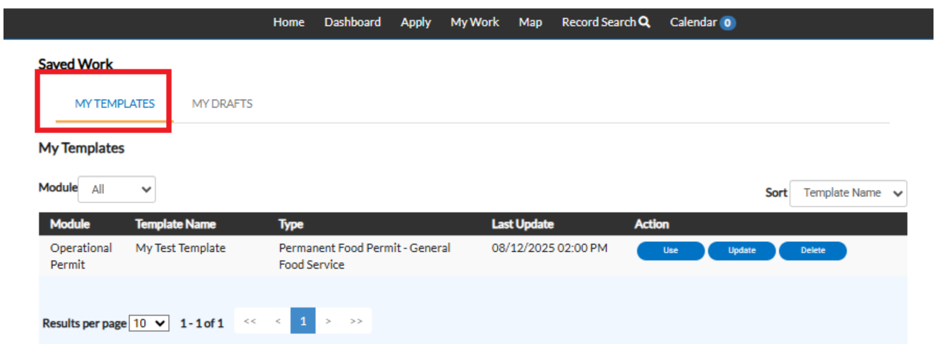
Saved Work

You can access your saved work by selecting your name in the upper right corner of the screen, then selecting **"Saved Work"** from the drop-down menu.

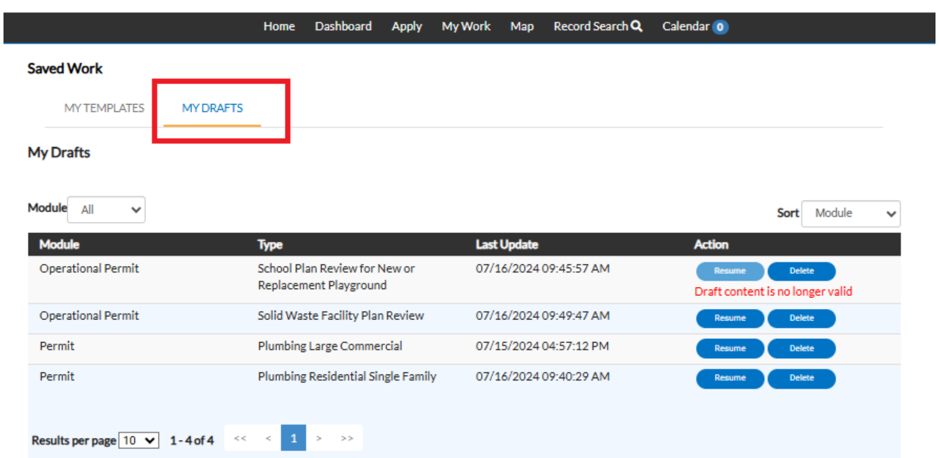


Your **"Saved Work"** page is divided into several sections:

- **My Templates**: Stores templates saved during the application process. This can be useful if you frequently submit similar applications and want to reuse the same information to save time.

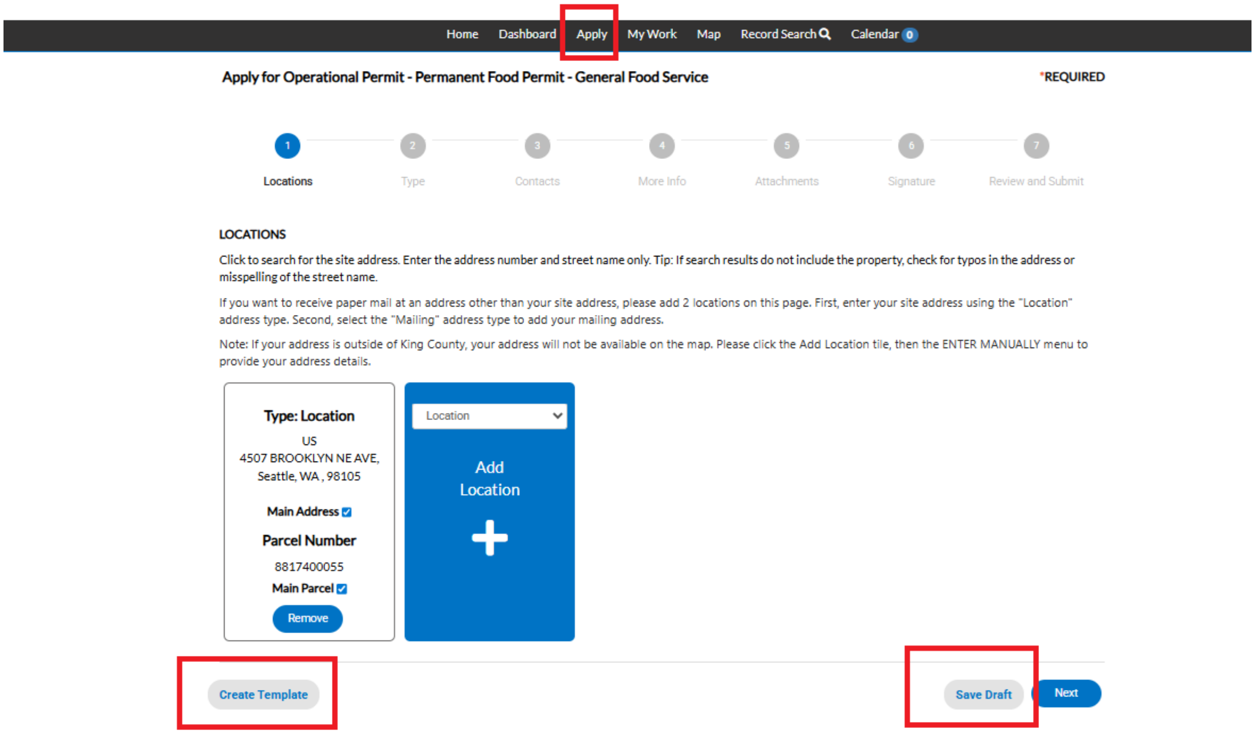


- **My Drafts**: Contains saved drafts of applications. Saved drafts can be found under your **Saved Work**.



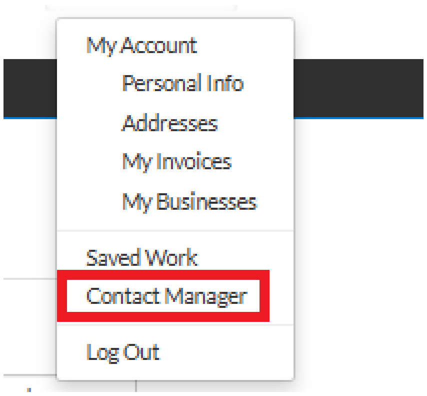
Creating a Template or Draft

- To create a template or draft, you must first start a new application
- Once the application is in progress, options to "**Save as Template**" or "**Save as Draft**" will appear at the bottom of the screen.



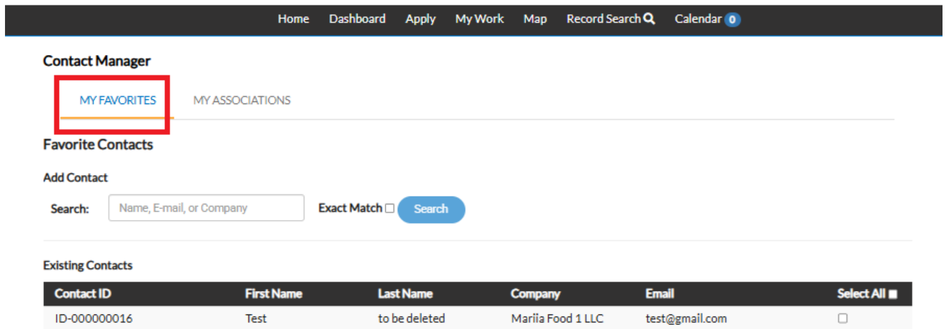
Contact Manager

You can manage your contacts by selecting your name in the upper right corner of the screen, then selecting **"Contact Manager"** from the drop-down menu.



This section is divided into two tabs, each with a specific function:

- **My Favorites:** Displays a list of all contacts you previously used during application submissions. This allows for quick access and reuse of frequently used contacts.



- **My Associations:** Allows you to request access to your company's cases.
  - Use the search field to find your company. If the company has already been set up in the system, it will appear in the results.
  - Select **"Request Access"** to send an email request to the company administrator for case access.