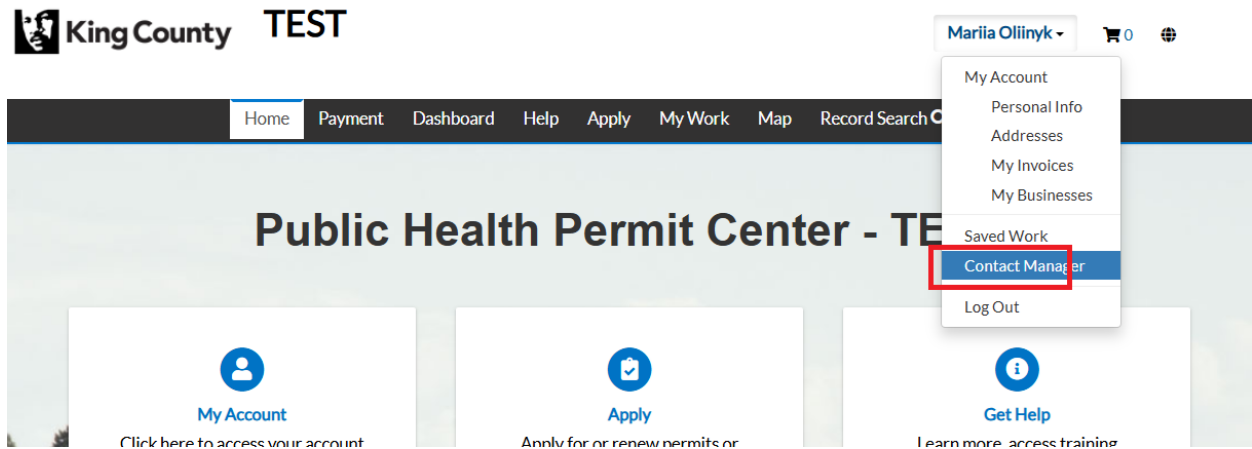
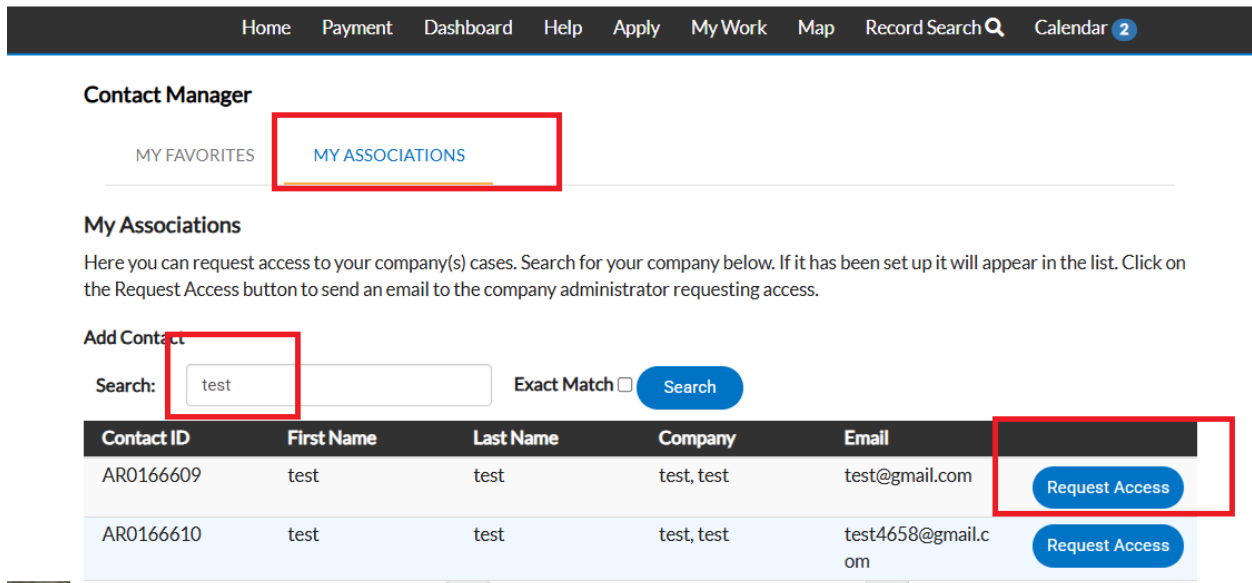


Plumbing Contractors: How to Request Access to Permit Records

1. Go to “Contact Manager”



2. Open “My Associations” tab and search for the company’s name.
 - a. Press “Request Access”



3. The company has to grant that access on their end (through their online portal):

Contact Manager

MY FAVORITES

ASSOCIATES

MY ASSOCIATIONS

Associates

Here you are able to add associates, also known as sub contacts, to your account. Associates will mirror your access to cases, including the ability to toggle on/off visibility on the Dashboard, My Work, and your access to specific case details and actions.

Add Contact

Search: Exact Match

Existing Associates

Contact ID	First Name	Last Name	Company	Email	Action
ID-1000000	M-	O...	TEST	test@gmail.com	<input type="button" value="Approve"/> <input type="button" value="Deny"/>

The company will have to go to the Contact Manager, open “Associates” tab and press “Approve” button.

- After request is approved by the company, plumbing contractor will see the company’s contact under “Existing Associations” section :

Contact Manager

MY FAVORITES

MY ASSOCIATIONS

My Associations

Here you can request access to your company(s) cases. Search for your company below. If it has been set up it will appear in the list. Click on the Request Access button to send an email to the company administrator requesting access.

Add Contact

Search: Exact Match

Pending Contacts

Pascale's Company Name

Existing Associations

Contact ID	First Name	Last Name	Company	Email	Action
ID-100006122	Pascale	Testing 2	Pascale's Company	pascale.testing2@gmail.com	<input type="button" value="Remove"/>

- After access has been granted, the plumbing contractor can open ‘My Work’ and turn on the ‘Include Company Records’ toggle in the upper right corner. Once enabled, they will see not only the permits where they are listed as a contact, but also the company-owned permit records they have been given access to:

