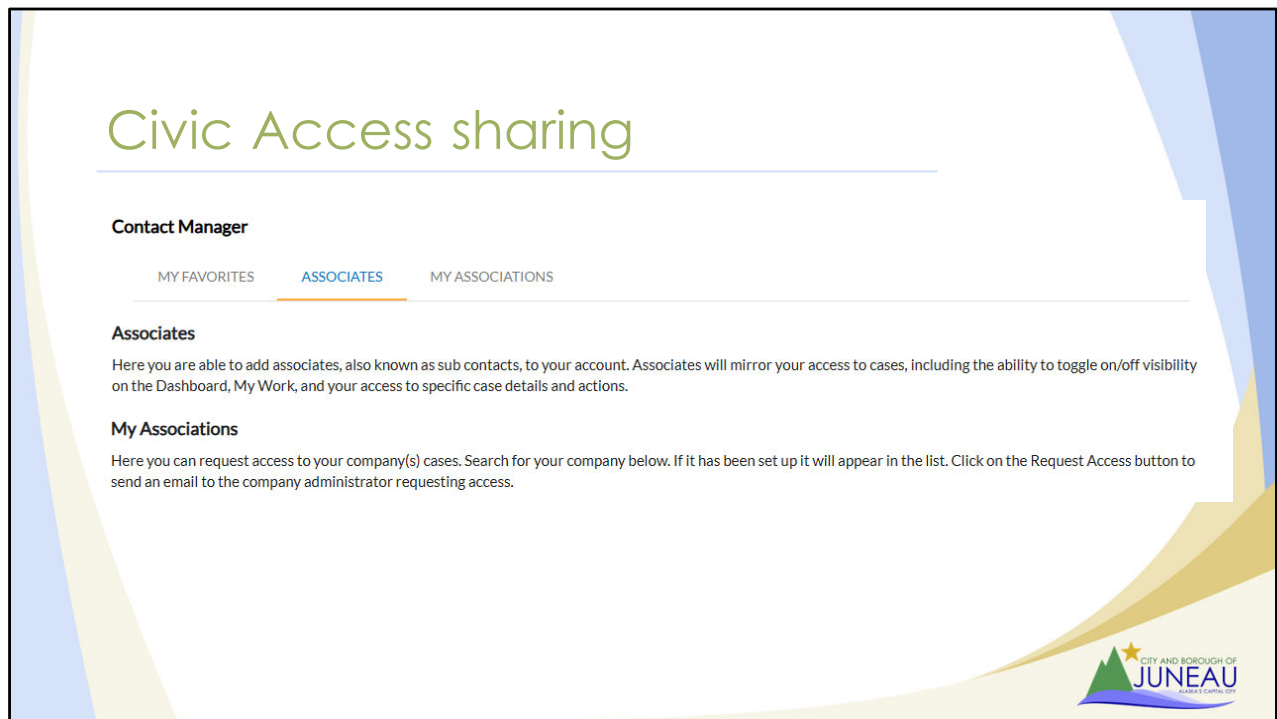


Ok, because I know you will ask – can you share this account with your staff? Short answer – yes. We do not have to do this today – we can do it any time, and you can change it easily with staff fluctuations. Since you may not have your employees signed up today, let’s walk through how this would look.

First, under your login at the upper right corner, choose “Contacts Manager.”



There are multiple tabs under Contact Manager.

“Associates” are people who are looking at your applications.

“My Associations” are people whose applications you are looking at.

There are two ways to set up the relationships that correspond to the type of relationship.

Nailed It!

Contact Manager

MY FAVORITES ASSOCIATES 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 ☐ [Search](#)

Contact ID	First Name	Last Name	Company	Email	
ID-000000145	Irene	Gallion	Epic Proportions Development, LLC	imgallion@fastmail.fm	Request Access

Results per page: 1 - 1 of 1 << < 1 > >>

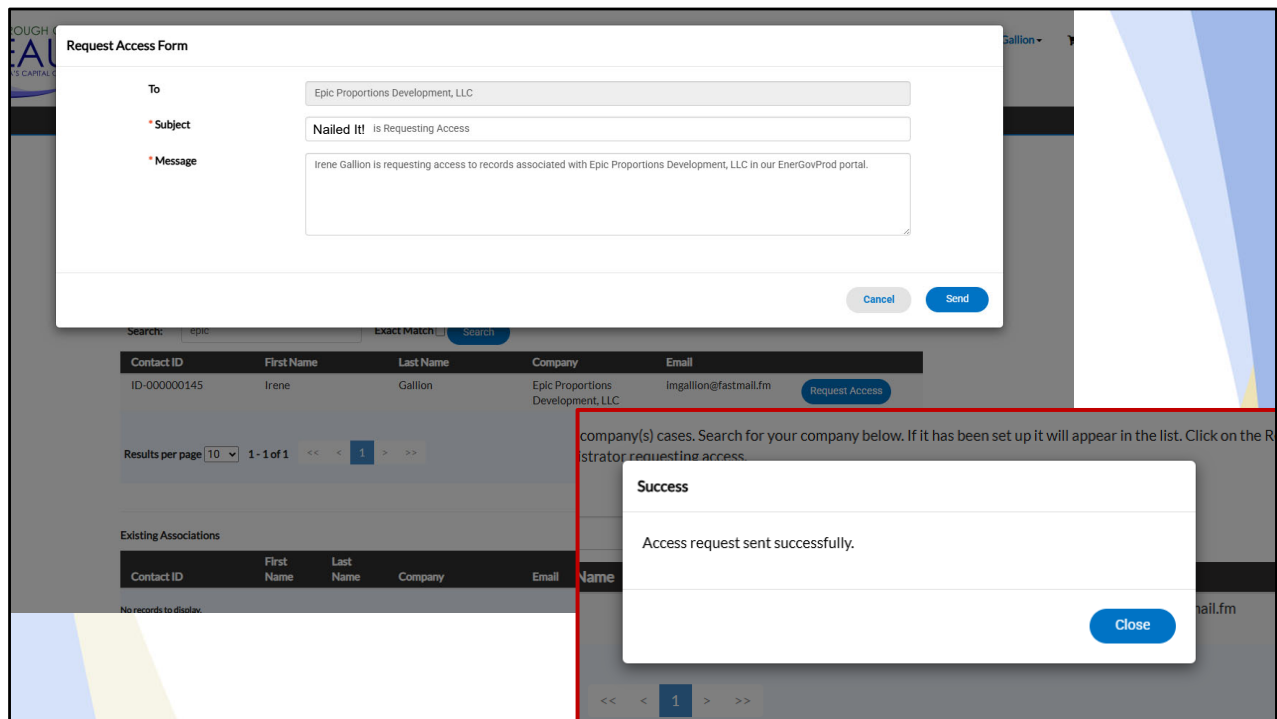
Existing Associations

Contact ID	First Name	Last Name	Company	Email	Action
No records to display.					

BOROUGH OF
JEAN
ALABAMA CAPITAL CITY

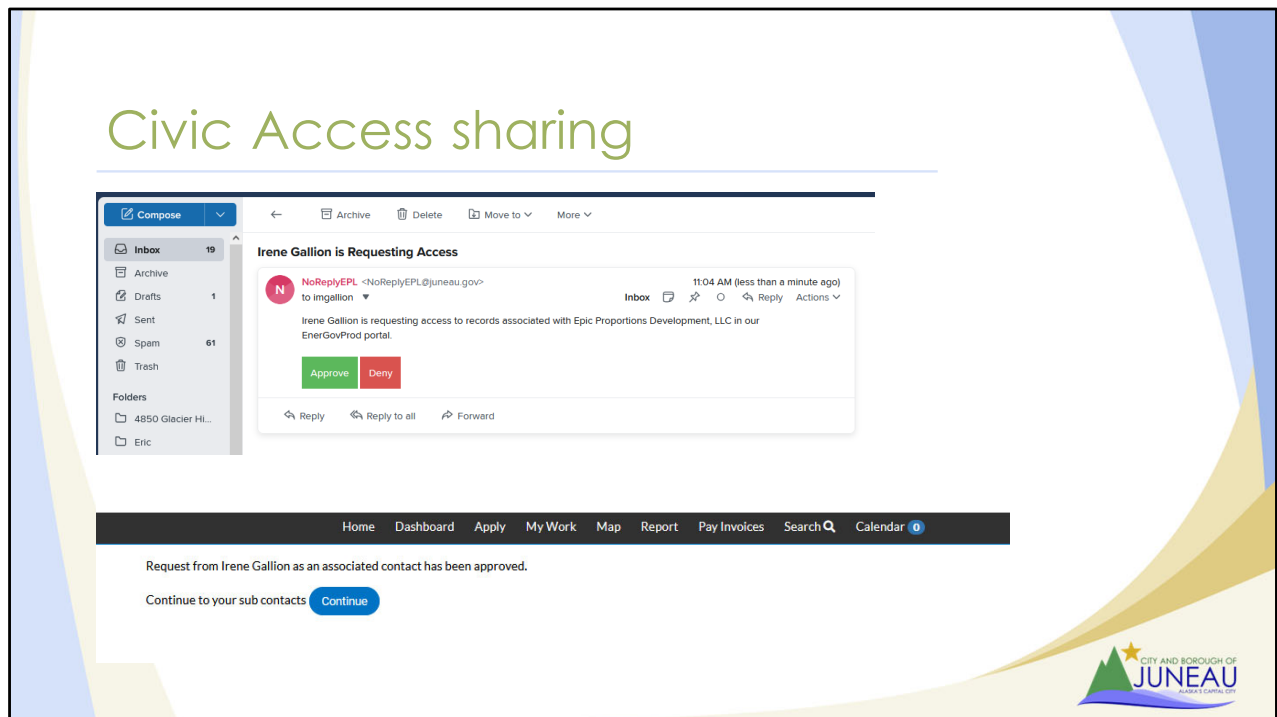
To look at someone else's information, you go to "Associations" and request permission.

In this case, Nailed It! is asking to view Epic Proportions documents.



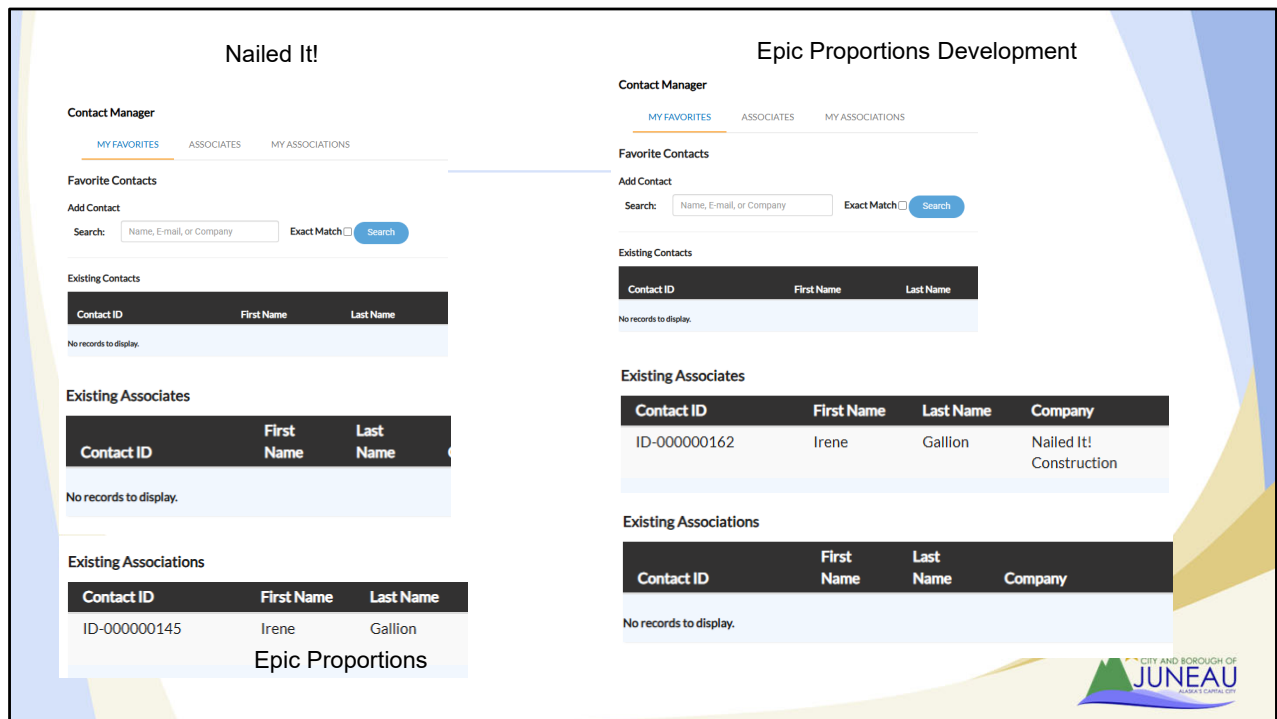
You get a chance to personalize the e mail...

Civic Access sharing



Meanwhile, the entity you are requesting to view will get an e mail with the request, and can hit “Approve” or “Deny.” They’ll be briefly routed to the Civic Access site, which will confirm that the Associate has been approved.

In this case, Epic Proportions got the request from Nailed It!, and chose to approve.



Reviewing the contact manager for each company:

In our example, Nailed It!

- Has no existing favorite contacts.
- Has no Associates (no one looking at their applications)
- Has one Association (They are looking at Epic Proportions applications)

Epic Proportions

- Has no existing favorite contacts.
- Has one Associate (Nailed It! Can look at their applications)
- Has no Association (they are not looking at anyone else's data).