City of Palm Beach Gardens

Civic Access Guide – Managing Associate Access

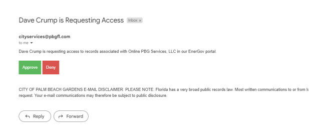
The city's online portal will allow contacts to request access to another account's records. A prime example of this scenario would be a business that wishes to allow staff within their organization to act on behalf of their company to manage permit records using their own login.

In this guide, we will cover basic associate management such as approving a request from another contact or removing associate access.

Approving Sub Contact Requests

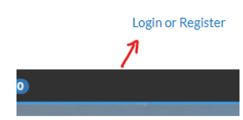
If your business is registered in the city's system as a company, other contacts can locate and request access to your account. Follow these steps for approving those requests

1. You will receive an automated email from our online portal when another contact is requesting access to your account

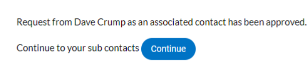


2. Click either the Approve or Deny button to accept or reject the request

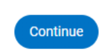
3. If you are not already logged into the system, sign into Civic Access by clicking on the Login or Register link using credentials you previously established (see appropriate guide for setting up your username and password)



4. If approving the request, you will be redirected to a confirmation screen within the online portal



5. Click Continue

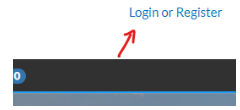


6. Upon accepting your first request, or staff manually linking the two accounts, an Associates tab will now be displayed in the Contact Manager portion of your online account

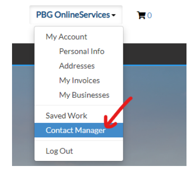
Adding Associates Manually

Rather than contacts requesting access, you can manually grant access to your account using the Contact Manager

1. Sign into Civic Access by clicking on the Login or Register link using credentials you previously established (see appropriate guide for setting up your username and password)

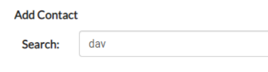


2. Once logged in, click your account name in the upper right corner and select Contact Manager from the drop-down



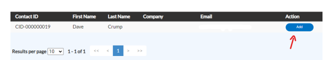
3. Select the Associates tab

4. In the Add Contact field, type is a portion of the contact's name that you would like to associate with your account

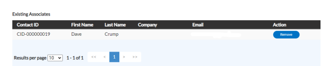


5. Click Search

6. In the results section, click the Add button next to the desired contacts



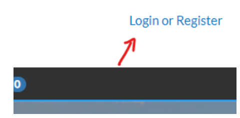
7. Contact(s) will now appear under the Existing Associates section of the Associates tab



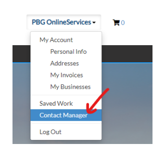
Removing Associate Access

Follow these steps if the contact no longer requires access to any of your online records

1. Sign into Civic Access by clicking on the Login or Register link using credentials you previously established (see appropriate guide for setting up your username and password)



2. Once logged in, click your account name in the upper right corner and select Contact Manager from the drop-down



3. Select the Associates tab

4. Under the Existing Associated section, find the sub contact record you wish to disassociate with your account and click the Remove button