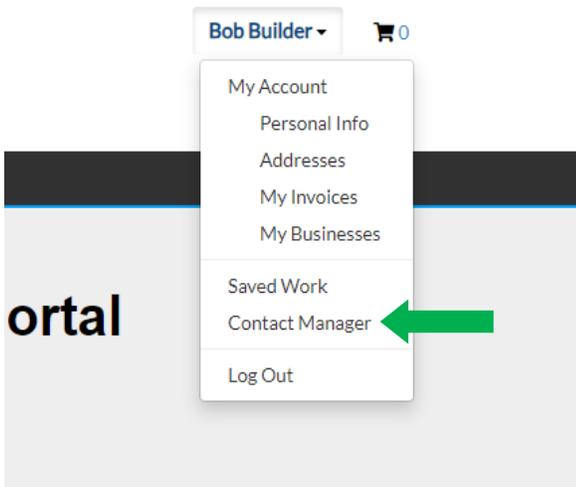


Sub contacts: How to add users to an account

Every company in the Town of Breckenridge’s software has a main contact. That contact has an email address associated with the account, that they use to login to their Building Access Portal account. The main contact has the ability to add as many other users to the account as needed—for example, other employees or project managers. In this guide, we will refer to the main contact as “main contact”, and any other users as “sub contacts.” Once added by the main contact, sub contacts have the same abilities as the main contact has: they can view permit info, apply for permits, request inspections, and pay invoices.

If you are the Main Contact and need to add Sub Contacts to your account:

- First, make sure any sub contacts you want to add have an Access Portal account. If they do not have one, instruct them to register for one.
- Login to your Access Portal account. On the home screen, in the top right corner, click on your name and a pull-down menu will appear. Click on “Contact Manager”



- In the Contact Manager screen, click on “Associates”



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
No records to display.					

- In the “search” field, search for the user you would like to add as a sub contact, and click “search”
- Contacts that match your search are displayed. Click “Add” to add that contact.

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

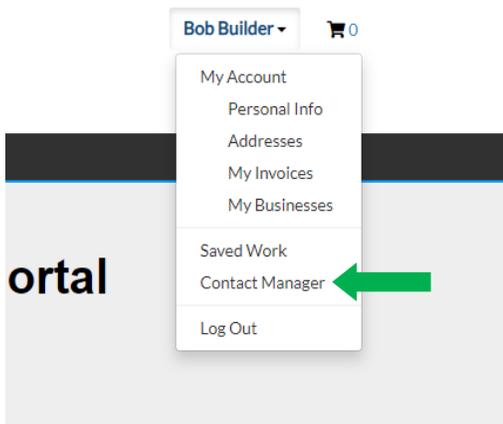
Contact ID	First Name	Last Name	Company	Email	Action
ID-000005733	Jamie	Dockery		t. [redacted]@gmail.com	<input type="button" value="Add"/>
ID-000005743	Malcome	Dockery	Jamie's Company	D. [redacted]@gmail.com	<input type="button" value="Add"/>

Results per page 1 - 2 of 2 << < 1 > >>

- Repeat steps to add as many other sub contacts as needed.

If you would like to be a sub contact and need to request access from the main contact:

- Login to your Access Portal account. If you do not have one, register for one.
- Once you're logged in, on the home screen in the top right corner, click on your name and a pull-down menu will appear. Click on “Contact Manager”



- On the Contact Manager screen, click on “My Associations”

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

Existing Associations

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

- In the search field, enter the name of the main contact and click “Search”
- Search results will display. Click “Request Access” next to the appropriate contact.

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	Action
ID-000005743	Malcome	Dockery	Jamie's Company	D[REDACTED]@gmail.com	Request Access

Results per page

10

1 - 1 of 1

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1

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- The “Request Access” form will display. Click “Send” to send the request to the main contact.
- The main contact will receive an email and will need to approve access.

Request Access Form

To: Jamie's Company

* Subject: Bob Builder is Requesting Access

* Message: Bob Builder is requesting access to records associated with Jamie's Company in our [BreckenridgeCO](#) portal|

Cancel Send



The Town of Breckenridge Planning and Building Departments are open Monday-Thursday from 8am to 5pm, and Fridays from 8am to 12pm. During business hours we can be reached by phone at 970-453-3180, or via email at building@townofbreckenridge.com