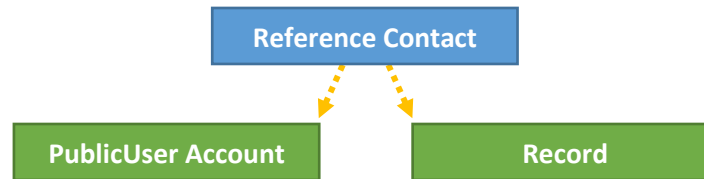
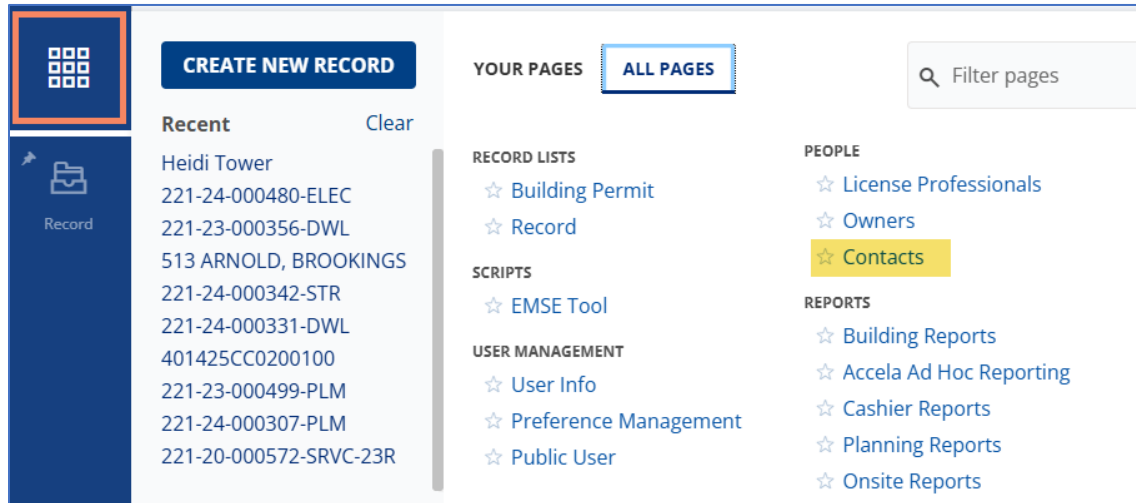


Link PublicUser to Record to View Electronic Plans

By default, the PublicUser who submitted the online application can always view electronic plans on the record. To allow other PublicUsers to view the electronic plans, a Reference Contact can be added to both the PublicUser account and Record to link them together.



1. Go to **Contacts** from the Launchpad.

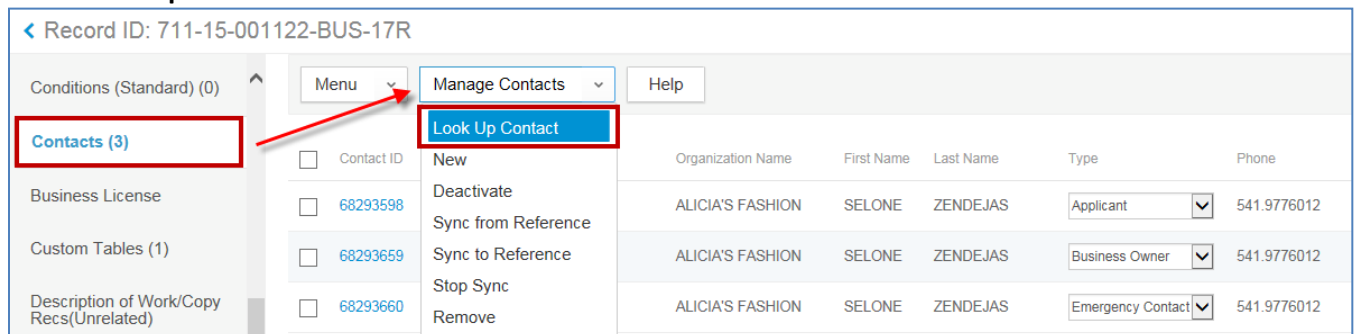


2. This will open up the **Reference Contacts** page. First, search for the appropriate contact to see if it exists. If it doesn't, go ahead and **create it**. After it's created, take note of the **Reference Contact ID**. This is a unique number associated to each reference contact and can be used in the next steps.

The screenshot shows the 'Contacts' page with a table of reference contacts. The table has columns for Last Name, First Name, Organization Name, Type, Phone 1, E-mail, Preferred Channel, and Reference Contact ID. A single contact is listed: Heidi Tower, 221-24-000480-ELEC, 221-23-000356-DWL, 513 ARNOLD, BROOKINGS, 221-24-000342-STR, 221-24-000331-DWL, 401425CC0200100, 221-23-000499-PLM, 221-24-000307-PLM, 221-20-000572-SRVC-23R.

Last Name	First Name	Organization Name	Type	Phone 1	E-mail	Preferred Channel	Reference Contact ID
Tower	Heidi		Applicant	503-555-5555	heidi.s.tower@dcbs.oregon.gov	E-mail	1491671

3. Go to the Record List and search for the appropriate record. Go to **Contacts** and hover over **Manage Contacts**. Select **Look Up Contact**.



- Search for the appropriate reference contact. Make sure to select the one with the matching **Reference Contact ID** as seen in the step above.

Menu ▾ New in Reference Search Close Matches **Select** Cancel Help

Showing 1 of 1

<input type="checkbox"/>	Last Name	First Name	Organization Name	Type	Phone 1	E-mail	Preferred Channel	Reference Contact ID
<input checked="" type="checkbox"/>	Tower	Heidi		Applicant	503-555-5555	heidi.s.tower@dcbs.oregon.gov	E-mail	1491671

You should receive confirmation that the contact was added successfully.

Menu ▾ Manage Contacts ▾ Help

1 record(s) added successfully.

<input type="checkbox"/>	Contact ID	Full Name	Organization Name	First Name	Last Name	Type	Phone	E-mail
<input type="checkbox"/>	73736102			Heidi	Tower	Applicant ▾	503-555-5555	heidi.s.tower@dcbs.oregon.gov
<input type="checkbox"/>	73734095	TODD S WILSON	TODD S WILSON			Applicant ▾	5413734954	nothing@nothing.com
<input type="checkbox"/>	73734096		TODD S WILSON			Site Contact ▾	5413734954	nothing@nothing.com

- Next, associate the same reference contact to the public user account. This step can only be done after the user has created their public user account. Go to the Launchpad and open the **Public User** page.

CREATE NEW RECORD

Recent Clear

- 221-24-000480-ELEC Heidi Tower
- 221-23-000356-DWL 513 ARNOLD, BROOKINGS
- 221-24-000342-STR
- 221-24-000331-DWL
- 401425CC0200100
- 221-23-000499-PLM
- 221-24-000307-PLM
- 221-20-000572-SRVC-23R

YOUR PAGES **ALL PAGES** Filter pages

- ☆ Record
- ☆ Owners
- ☆ Contacts

SCRIPTS

- ☆ EMSE Tool

USER MANAGEMENT

- ☆ User Info
- ☆ Preference Management
- ☆ **Public User**

REPORTS

- ☆ Building Reports
- ☆ Accela Ad Hoc Reporting
- ☆ Cashier Reports
- ☆ Planning Reports
- ☆ Onsite Reports

TASKS & ACTIVITIES

- ☆ My Tasks
- ☆ Activities

- Search for the public user account based on the email address associated to the account. Email or User ID are generally the best ways to search for a public user account.

Public User

Menu ▾ Submit Reset Cancel Help

Organization Name

Last Name First Name

Public User's E-mail
putyour.email_@here.com

User ID

7. Select the public user account by clicking on the email address.

The screenshot shows the 'PublicUser' interface. At the top, there is a 'Menu' dropdown, 'New', 'Search', and 'Help' buttons. Below these, there are two search criteria: 'User ID' and 'E-mail'. The 'E-mail' field contains the text 'putyour.email_@here...' and is highlighted with a red box. Below the search fields, there is a 'state_combo_' dropdown.

8. Click on **Contact** and choose **Look Up**.

The screenshot shows the 'Public User' interface. On the left, there is a sidebar with links: 'Public User', 'Registered Agencies', 'License', 'Address', 'Parcel', 'Owner', and 'Contact'. The 'Contact' link is highlighted with a red box. On the right, there is a table with columns: 'Last Name', 'First Name', 'Organization Name', 'Type', and 'Phone 1'. The table is empty, and a message '0 record(s) found.' is displayed. Above the table, there is a 'Menu' dropdown and buttons: 'Look Up', 'Delete', 'Approve', 'Reject', 'Set as Account Owner', and 'Help'. A red arrow points from the 'Look Up' button to the 'Contact' link.

9. Search for the same reference contact that was associated to the record. Make sure to select the one with the matching Reference Contact ID. Click **Connect**.

The screenshot shows the 'Public User' interface. At the top, there is a 'Menu' dropdown, 'Connect', 'Search', 'Close Matches', 'Cancel', and 'Help' buttons. Below these, there is a table with columns: 'Last Name', 'First Name', 'Organization Name', 'Type', 'Phone 1', 'E-mail', 'Preferred Channel', and 'Reference Contact ID'. The table contains three rows of data. The first row is highlighted with a red box, and the 'Reference Contact ID' '691571' is highlighted in yellow. A red arrow points from the 'Connect' button to the first row of the table.

Last Name	First Name	Organization Name	Type	Phone 1	E-mail	Preferred Channel	Reference Contact ID
Shamberger	Heidi		Applicant	503-999-9999	heidi.s.shamberger@oregon.gov	Email	691571
Shamberger	Heidi		Applicant	111-111-1111	hshamberger@gmail.com		671245
Shamberger	Heidi		Business Owner	999-999-9999	heidi.s.shamberger@oregon.gov		671339

You should receive confirmation that the contact was added successfully.

The screenshot shows the 'Public User' interface. At the top, there is a 'Menu' dropdown, 'Look Up', 'Delete', 'Approve', 'Reject', 'Set as Account Owner', and 'Help' buttons. Below these, there is a yellow message box that says '1 record(s) connected successfully.'. Below the message box, there is a table with columns: 'Last Name', 'First Name', 'Organization Name', 'Type', and 'Phone 1'. The table contains one row of data.

Last Name	First Name	Organization Name	Type	Phone 1
Shamberger	Heidi		Applicant	503-999-9999

At this time the public user can log into Citizen Access and see all electronic plans!