

# How to add/edit individuals, customers, and other contacts to your account

1. Log into your account, enter your User Name or E-mail and Password, then click the “Login” button.

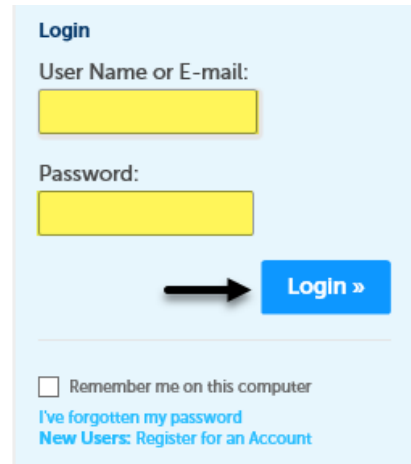
## Please Login

Existing users, please login using your user name or e-mail address and your password.

### New Users

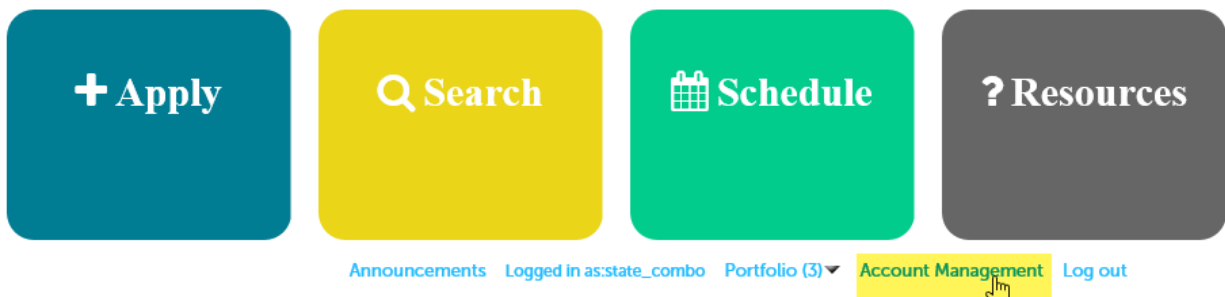
If you are a new user, you must [register](#) for an ePermitting account.

[Register Now »](#)



The screenshot shows a login form with the following elements: a title 'Login', a label 'User Name or E-mail:' followed by a yellow input field, a label 'Password:' followed by another yellow input field, a blue 'Login »' button with a black arrow pointing to it, a checkbox labeled 'Remember me on this computer', and two links: 'I've forgotten my password' and 'New Users: Register for an Account'.

2. Click on “Account Management”.



3. Scroll midway down the web page to the Contact Information section and then click “Add a Contact.”

Contact Information [Add a Contact](#)

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Showing 1-3 of 3 | [Download results](#)

Action	Contact Type	First Name	Last Name
<a href="#">Actions ▼</a>	Owner	Jerod	Broadfoot
<a href="#">Actions ▼</a>	Sub-Contractor	John	Smith
<a href="#">Actions ▼</a>	Applicant	State	Oregon

**Tip** – When setting up or managing your ePermitting account you will want to add contacts that you use on a regular basis. For example, let’s say that ABC Construction does all of the work for Burgers Inc. ABC Construction can add John Smith from Burgers Inc. as a contact on their account and when pulling permits can simply choose John

Smith from the list of contacts instead of typing his information into each and every application.

4. From the drop-down list, select the option that best describes the contact you are adding. For example, if the contact you are adding is a home owner you could select "Owner" or "Applicant". If they are a contractor you could select "General Contractor", "Sub-Contractor" or "Organization". Again, choose the option that comes the closest to describing the contact you are adding to your account. Then click the "**Continue**" button.

## Select Contact Type

\* Type:

**Con**

- Select--
- Agent for Applicant/Owner
- Applicant
- Business Owner
- General Contractor
- Individual
- Organization
- Owner
- Site Contact
- Sub-Contractor

5. Enter all of the contact information you want to have associated to the contact you are adding, then click the "**Continue**" button.

## Contact Information

\* First:

\* Last:

Name of Business:

\* Country:

\* Address Line 1:

\* City:

\* State:

\* Zip:

\* Primary Phone

Work Phone:

Mobile Phone:

\* E-mail:

Fax:

**Continue**

**Clear**

**Discard Changes**

- Now you have added a contact! Repeat the steps to enter as many contacts as you would like to your account.

# To update or remove an individual

1. To remove an individual, click on the **“Actions”** button next to the individual you wish to remove and simply select **“Remove.”**

Contact Information Add a Contact

Showing 1-3 of 3 | [Download results](#)

Action	Contact Type	First Name	Last Name
<a href="#">Act</a>	Owner	Jerod	Broadfoot
<b>Actions</b>	Applicant	Bob	Smith
	Applicant	State	Oregon

View  
Remove  
Set as Account Owner

2. Then click **“OK”** in the popup box to confirm.

Message from webpage

Are you sure you want to delete this item?

OK Cancel

3. To update an individual's information, click on the **“Actions”** button and select **“View,”** make the changes as needed and click **“Save.”**

From this screen you can edit/update all of the individual's information,

## Contact Information

\* First:

John

\* Last:

Smith

Name of Business:

ABC Construction

\* Country:

United States ▼

\* Address Line 1:

123 Abc St.

\* City:

Salem

\* State:

OR ▼

\* Zip:

97303-

\* Primary Phone

000-000-0000

Work Phone:

Mobile Phone:

\* E-mail:

somebody@abcconstruction.net



Fax:

Continue

Clear

Discard Changes