

## Introducing Portal Sharing

We are excited to introduce **Share**, a new feature in the CityView Portal. Share is a feature that allows a contact on an application to share an application/case with another registered user.

*Contacts - any person or business that has some involvement with an application or case. Contacts will always include applicants and property owners and may include contractors, complainants, violators, etc.*

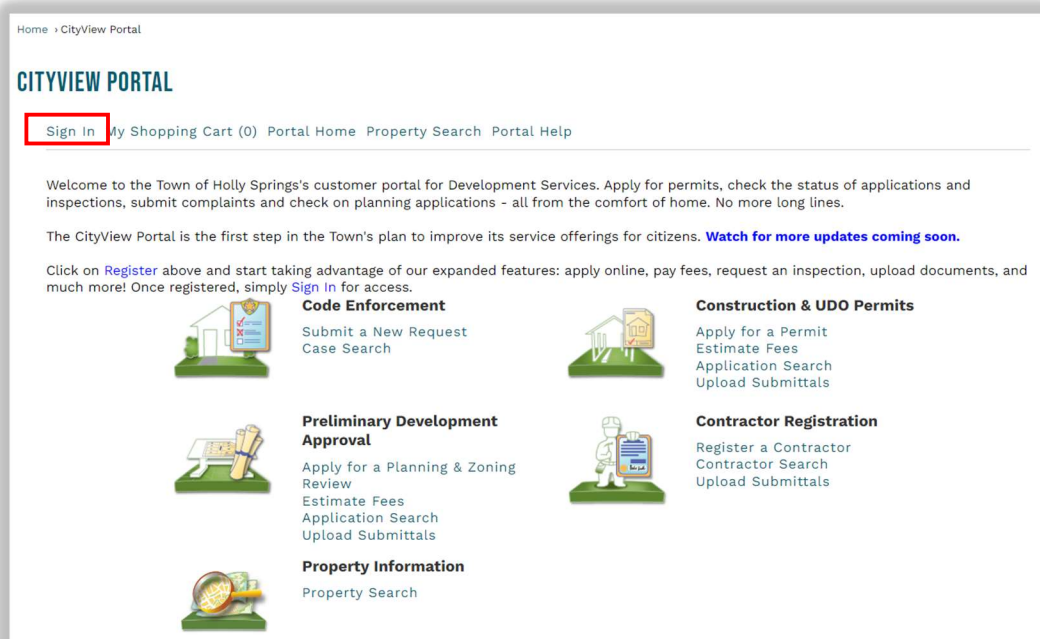
## Why Share?

Once an application/case is shared, the registered user(s) will be able to pay fees, schedule inspections, view documents, etc.

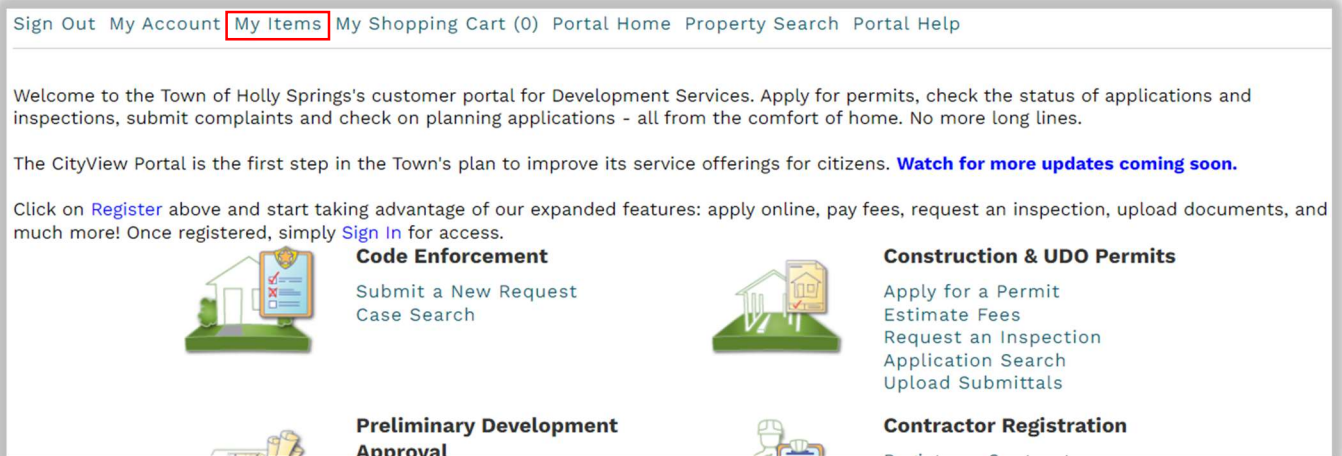
## How to Share an Application/Case

A registered CityView Portal user who is listed as a contact on an application/case can elect to share an application/case with anyone. All you need is their valid email address. The recipient will receive an email and will complete their portion.

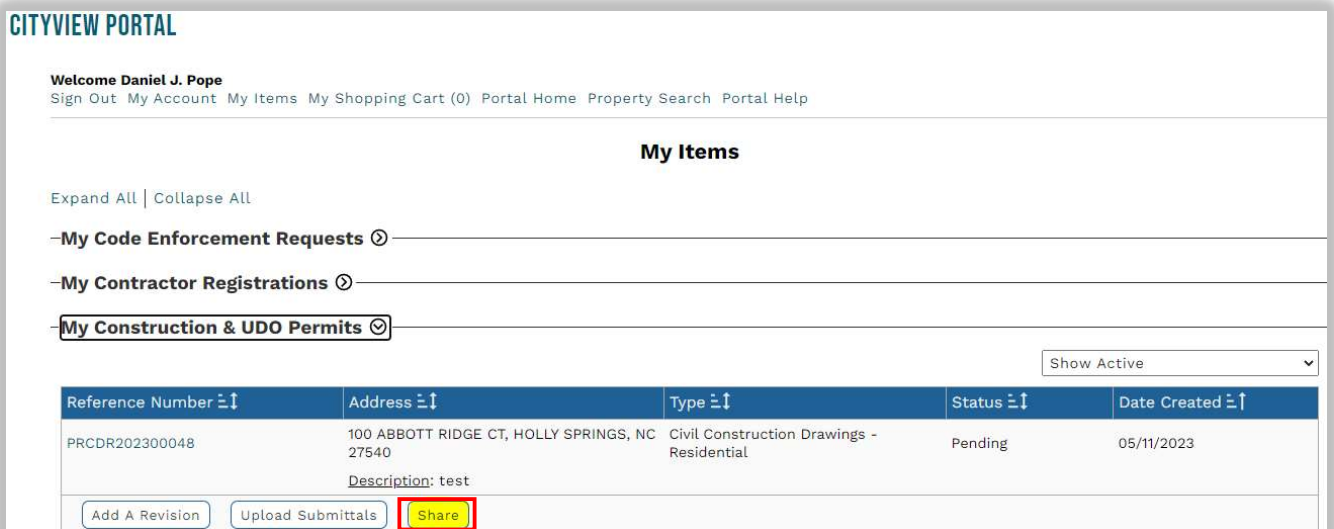
- ☐ Open CityView Portal and log in



- ☐ Select the **My Items** tab



- ☐ Locate the application/case you'd like to share
- ☐ Select **Share**



- ☐ Click on the **Add New Share Contact** button



- ☐ A new window will open. Enter the email address of the contact to share with.
- ☐ Click on **Share**

X

### New Shared Contact

By clicking the "Share" button, the item will immediately be shared with the user.  
If the email address does not match a registered portal user account, an invitation will be sent to that email address, inviting them to register.

Email Address:\*

johnnorjanedoe@gmail.com

Enter the user email address that you want to share the application with

Confirm Email Address:\*

johnnorjanedoe@gmail.com

Enter the user email address again.

Share

- ☐ You will be returned to the share screen. The shared contact will receive an email with a link to the shared record.

**CITYVIEW PORTAL**

Welcome Daniel J. Pope  
[Sign Out](#) [My Account](#) [My Items](#) [My Shopping Cart \(0\)](#) [Portal Home](#) [Property Search](#) [Portal Help](#)

### Permits and Inspections Sharing

Reference Number: PRCDR202300048  
 Type: Civil Construction Drawings - Residential  
 Description: test

[Unshare All](#)

**Shared Contact List** ☑

Email Address*
<div style="border: 1px solid #ccc; padding: 2px;">johnnorjanedoe@gmail.com</div> <div style="text-align: right; border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; text-align: center; line-height: 20px; margin-top: 2px;">X</div>

• johnnorjanedoe@gmail.com does not exist! an invitation email has been sent to this email.

Add New Shared Contact

Sharing this item will allow the person you are sharing with to access the item from the "My Items" page. The shared user will have the same permissions that you have as a contact on the item.

- ☐ The text in red indicates that the email address is not a current registered CityView Portal user with the Town of Holly Springs. The recipient will be notified by email and required to register.
- ☐ In the *Shared Contact List*, everyone you have shared the specific record with will be listed.
  - Selecting the X next to an email address will remove the shared rights to the record.

### Receiving a Shared Record

- ☐ Once the share request is sent, the recipient will receive an invitation via email with a link to the CityView Portal application/case.
- ☐ If the recipient is not a registered CityView Portal user with the Town of Holly Springs, they will be invited to register.
- ☐ Users must register with the same email address where their shared record invitation was received.
- ☐ Shared records will appear on the user's *My Items* page.