COMPASSKC

CITY SERVICES AT YOUR FINGER TIPS

KANSAS CITY MISSOURI

HOW TO USE CONTACT MANAGER

The Contact Manager is a feature within the Compass KC system designed for companies to manage access to their records. It is used by a company's main contact and other employees, called "sub-contacts," who need to access company records.

This tool is especially helpful for businesses where multiple team members need to work on the same projects, such as when a company is applying for a permit or a developer is submitting an application.

Requesting Access to Company Records:

Step 1: Go to the ***Compass KC*** website and log in (https://compasskc.kcmo.org)

Step 2: Click on your name in the top right-hand corner and select ***Contact Manager***.

Step 3: Click on ***My Associations***.

Step 4: Search for the company name or email address.

Step 5: Click on ***Request Access*** next to the company's name. An email will be sent asking for approval.

APPROVING OR DENYING A REQUEST

A Guide for Using the Main Company Contact

This section is for the main company contact. The City recommends setting up the company contact with a group email, such as permitting@mycompany.com or office@mycompany.com. To complete the process of registering a company, please email compass@kcmo.org to let us know you have registered. Please include the email address you used to set up the company account.

When an employee, or "sub-contact," requests access to your company's records, you'll receive an email notification. The following steps explain how to approve or deny those requests.

To approve or deny the request:

Step 1: Click the appropriate link in the email to ***Approve*** or ***Deny*** the request

- ***Approving*** a request gives the user access to all records associated with the company. If the person only needs a few cases, you should add them as a contact on the individual record instead.
- ***Denying*** a request cannot be undone. *The person will have to submit a new request if they still need access.*

Step 2: After clicking your choice, you will be taken to the log-in screen if you are not already logged in.

Step 3: Once you log in, a message will confirm your choice to either approve or deny the request.

Step 4: The newly approved user can then go to the ***My Work*** section and use a toggle switch to view the records associated with the main contact.