Share access to your application with someone

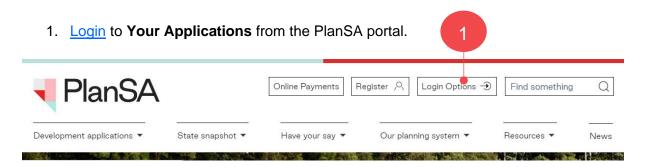


Background

This 'How To' will step you through how you can share access to your application with someone else so that they can perform actions on the application throughout the development application assessment process.

Examples of actions your contacts will perform include:

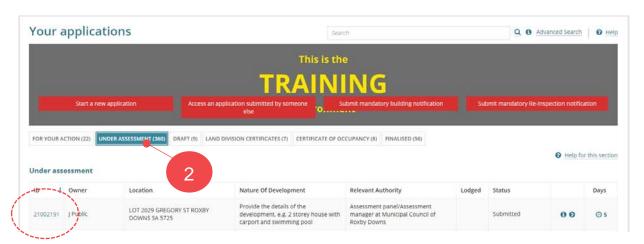
- Payment of fees: The 'invoice contact' receives an email request to make payment and makes a 'quick' payment within PlanSA or from the application within the ePlanning system.
- Provide information: The 'primary contact' receives an email request to provide missing and/or required documentation and uploads the information into the applications document store within the ePlanning system.



2. Click on the **Under Assessment** tab to locate the application.

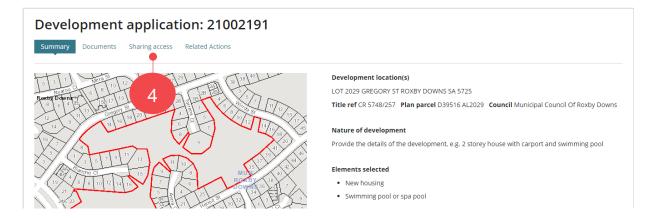
Alternatively, use the **Search** feature to locate the application using the ID number.

3. Click on the **ID** number of the application to view.



Version 1

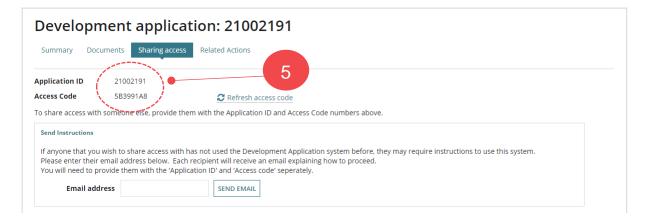
4. Click on Sharing access within the Development Application screen.



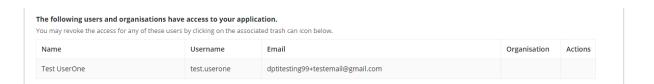
The Access Code is shown, provide this number and the application ID over the phone or in an email.

Use the Refresh access code option if the code has expired.

6. To send instructions on how to use the system to the contact who is being given access to the application, type their email address in the **Email Address** field and then click on **Send Email** to complete sharing the instructions.



A list of people that have access to your applications is also available from the **Sharing Access** screen, which allows you to check if your contacts have successfully accessed the application. You can revoke 'sharing access' from a contact in this section.

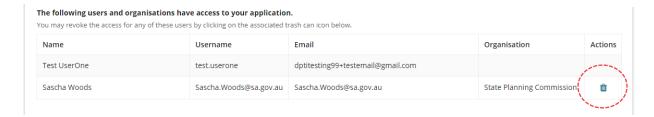


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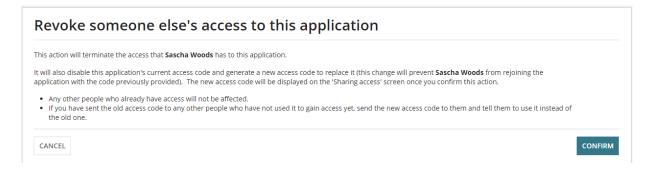
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Revoke Sharing Access

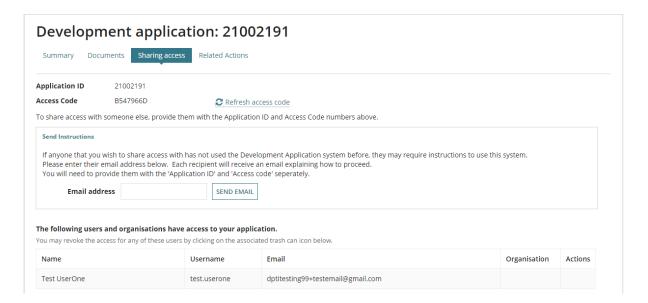
1. Click on the trash can icon.



2. Click on Confirm to complete the action.



The contact will be removed from the list of people that have access to your application.



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