

Cloudpermit

11911 Freedom Drive, Ste. 720
Reston, Virginia 20190
United States

Order Form

Order #: Q-02180-2
Customer #: CUST-0005222
Date: 2/23/2024
Sales Person: Josh Carpentier
Sales Person Email: josh.carpentier@cloudpermit.com
Delivery Method: E-Mail

Ship To

Erik Pullum
Mccordsville
6280 West 800 North
McCordsville, Indiana 46055
United States
317-335-5129
epullum@mccordsville.org

Bill To

Mccordsville
6280 West 800 North
McCordsville, Indiana 46055
United States

Subscription

Product		Year 1	Year 2	Year 3
Building	Annual Total	USD 5,000	USD 5,000	USD 5,000
Code Enforcement	Annual Total	USD 1,000	USD 1,000	USD 1,000
Licensing and Registration	Annual Total	USD 2,500	USD 2,500	USD 2,500
Planning	Annual Total	USD 3,500	USD 3,500	USD 3,500
Subscription Total:		USD 12,000	USD 12,000	USD 12,000

Subscription start date will be the contract signature date unless otherwise stated in the Terms & Condition section.

Service

Description	Annual Total
Data Import	USD 2,000
Implementation Fee - Building Software Solution	USD 500
Implementation Fee - Code Enforcement Software Solution	USD 500
Implementation Fee - Licensing and Registration Software Solution	USD 500
Implementation Fee - Planning Software Solution	USD 1,000
Service Total:	USD 4,500

Customer Total First Year:

USD 16,500

Terms and Conditions

Term: 3 years, billable annually
Invoicing: Subscription invoice to be sent after contract is signed and then annually.
First invoice (50%) for implementation fee is due upon implementation start (M1) and the second invoice (50%) for implementation fee to be sent after Go Live Milestone (M2) is approved.
Payment Term: Net 30 days from Invoice Date
Subscription Start Date: Date of contract signature

All stated prices are exclusive of any taxes.

Customer Name: _____
Signature: _____
Printed Name of Person Signing: _____
Title: _____
Date: _____
Accounts Payable Email: _____

By signing here, the Customer agrees to this Order Form, the Software Service Agreement and any other appendices and documentation expressly referenced in this Order Form, the Software Service Agreement and/or any amendments (together the "Agreement").
The individual signing this Agreement represents and warrants that he or she has the right and authority to bind the Customer.

Cloudpermit

Signature: _____
Printed Name of Person Signing: Jarkko Turtiainen
SVP North America
Title: _____
Date: _____

Cloudpermit Software

Service Agreement

THIS AGREEMENT is made by and between the "**Customer**" as identified in the Order Form and Cloudpermit, Inc. a Delaware corporation with its office at 11911 Freedom Drive, Suite 720, Reston, VA, 20190 ("**Cloudpermit**").

1. DEFINITIONS

1.1 Unless the context otherwise requires, the following words and expressions have the following meanings:

"Affiliate" means any entity that directly or indirectly controls, is controlled by, or is under common control with the subject entity. Such control, for purposes of this definition, means direct or indirect ownership or control by agreement or otherwise of more than 50% of the voting interests of the subject entity.

"Agreement" means the Order Form, this Software Service Agreement and all appendices and other documents expressly referenced in the Order Form, this Software Service Agreement and/or any amendments.

"Business Day" means any day other than a Saturday, Sunday or federal holiday in the USA.

"Cloudpermit Software" means the Cloudpermit platform, software applications and any third-party software applications that Cloudpermit will provide access to for the Customer and End Users.

"Confidential Information" means any information made available by one Party to the other, in any form or medium, that is proprietary or confidential to a Party or its affiliates, or their respective customers, suppliers, or other business partners, including, without limitation, all documentation, products, tools, materials, inventions, discoveries, works of authorship, programs, derivative works, information, designs, know-how, trade secrets, configurations, technical information, data, ideas, methods, processes, schematics and business plans, whether or not specifically identified as confidential.

"Customer Data" means information, data and other content that is provided by the Customer to Cloudpermit, but does not include any content that is publicly available, currently or in the future.

"Customer Systems" means the Customer's information technology infrastructure including computers, software, databases, database management systems, other electronic systems and networks, whether operated directly by the Customer or through the use of third-party services that enable the Customer and/or End Users to access the Cloudpermit Software.

"End User" means any individual that Customer has designated or authorized to use the Cloudpermit Software. End Users may include, for example, residents, employees, consultants, contractors of Customer, and representatives of any other third parties with which Customer transacts business.

"End User Data" means the information, data and other content that is provided by an End User to Cloudpermit but does not include any content that is publicly available, currently or in the future.

"Fees" means the annual subscription fees, implementation fees and any other fees stated in the Order Form, any Appendix or otherwise agreed to in writing by the Parties.

"Force Majeure Event" means any event or occurrence which is outside the reasonable control of a Party and which is not attributable to any act or failure to take commercially reasonable preventative action by that Party, including war, act of foreign enemies, hostilities (regardless of whether war is declared), terrorist activities, strikes, lockouts, pandemics, interruption or failure of electricity, and Acts of God (including fire, flood, earthquake, hurricane, or other natural disaster), but not including insolvency or lack of funds.

"General Communications Network" means communication networks owned, and/or leased, and operated by internet service providers which allow individuals to access the internet and access the Cloudpermit Software via the internet.

"Identifier" means a user name and password that associates an End User with the End User's account or user ID in the Cloudpermit Software.

"Implementation" means the initial configuration and implementation of the Cloudpermit Software for the Customer.

"Party" and **"Parties"** mean Cloudpermit and its affiliates and/or the Customer.

2. CLOUDPERMIT'S RESPONSIBILITIES

- 2.1 Cloudpermit will make the Cloudpermit Software available to the Customer pursuant to this Agreement and the additional terms and conditions for use of the Cloudpermit Software by End Users available at www.cloudpermit.com as may be amended from time to time.
- 2.2 Cloudpermit will use all commercially reasonable efforts to keep the Cloudpermit Software available for use except for downtime or degradation for maintenance, installation, change, data security risk, requirements of law, regulation by government authorities, a Force Majeure Event, or any other circumstances beyond Cloudpermit's reasonable control.

3. CUSTOMER'S RESPONSIBILITIES

- 3.1 The Customer and each End User is required to maintain an internet connection at its own cost to access the Cloudpermit Software.
- 3.2 The Cloudpermit Software may be used by the Customer and End Users only in accordance with this Agreement and the additional terms and conditions for use by End Users available at www.cloudpermit.com as may be amended from time to time.

- 3.3 The Customer will at all times maintain and operate in good repair the Customer Systems and take all actions necessary to secure Customer Data, End User Data and access credentials, including Identifiers. Cloudpermit is not liable or responsible for any delay or performance failure caused by the Customer or Customer Systems.
- 3.4 If the Customer becomes aware of any actual or threatened harmful activity with respect to Customer Data, End User Data, Identifiers, unauthorized access to the Cloudpermit Software, unauthorized access to or acquisition of Customer Data or End User Data, or any other breach related to the Cloudpermit Software in any way, the Customer will immediately notify Cloudpermit and the Parties will each mitigate any negative effects of such harmful activity or breach.
- 3.5 The Customer will promptly, upon request by Cloudpermit, provide all necessary information and guidelines to Cloudpermit for providing the Cloudpermit Software to the Customer and its End Users. The Customer ensures that the information and guidelines it provides are correct.
- 3.6 The Customer shall not, and shall not authorize any other person to, access or use the Cloudpermit Software except as expressly permitted by this Agreement and the Customer shall not: (a) copy, modify or create derivative works or improvements to the Cloudpermit Software; (b) rent, lease, lend, sell, sublicense, assign, distribute, publish, transfer or otherwise make available the Cloudpermit Software to any person, including on or in connection with any time-sharing, service bureau, software as a service, cloud or other technology or service; (c) reverse engineer, disassemble, decompile, decode, adapt or otherwise attempt to derive or gain access to the source code of the Cloudpermit Software; (d) access or use the Cloudpermit Software other than by an authorized End User through the use of his or her own then-valid access credentials; (e) input, upload, transmit or otherwise provide to or through the Cloudpermit Software any content, information or materials that are unlawful or injurious, or contain, transmit or activate any harmful code or content; or (f) access or use the Cloudpermit Software for purposes of competitive analysis of the Cloudpermit Software, or for the development, provision or use of a competing software service or product.

4. SERVICE FEES AND PAYMENT TERMS

- 4.1 In consideration of Cloudpermit's performance of its obligations under this Agreement, the Customer will pay all Fees in the manner provided for in the Order Form.
- 4.2 All Fees and other amounts payable by Customer stated in the Order Form and in this Agreement are exclusive of applicable taxes.
- 4.3 All amounts payable to Cloudpermit will be paid by the Customer in full without any set-off, recoupment, counterclaim, deduction, debit or withholding for any reason.
- 4.4 Any sum not paid by the Customer when due will bear interest from the due date until paid at a rate of 1.5% per month, compounded monthly, or the maximum rate permitted by law.
- 4.5 Invoices will be sent to the Customer as provided in the Order Form.

5. CHANGES

- 5.1 Cloudpermit reserves the right to make any changes to the Cloudpermit Software that it deems necessary or useful to: (a) maintain or enhance the quality or delivery of the Cloudpermit Software to its customers, the competitive strength of or market for the Cloudpermit Software, or the cost efficiency or performance of the Cloudpermit Software; or (b) to comply with applicable law.
- 5.2 Cloudpermit will make reasonable efforts to notify the Customer of any changes in advance. If such advance notice is not reasonably possible, then Cloudpermit will notify Customer after the change without delay.

6. DATA, PRIVACY AND PROTECTION

- 6.1 The Parties will each comply with all applicable privacy and data protection laws in force during this Agreement.
- 6.2 Cloudpermit warrants that it will employ security measures in accordance with Cloudpermit's privacy policy available at www.cloudpermit.com as may be amended from time to time. Neither Party is responsible for the data security of the General Communications Network or any disturbance in the General Communications Network.
- 6.3 Customer has and will retain sole responsibility for: (a) all Customer Data and End User Data, including its content and use; (b) all information, instruction and materials provided by or on behalf of the Customer or any End User in connection with the Cloudpermit Software; (c) the Customer Systems; (d) the security and use of Customer's and End Users' access credentials, including Identifiers; and (e) all access to and use of the Cloudpermit Software directly or indirectly by or through the Customer Systems or any End Users' systems.
- 6.4 Customer will employ all physical, administrative, and technical controls, screening, and security procedures and other safeguards necessary to: (a) securely administer the distribution and use of Identifiers or other credentials to access the Cloudpermit Software; and (b) control the content and use of Customer Data and End User Data, including uploading or other use or processing of Customer Data and End User Data, whether or not related to the Cloudpermit Software.
- 6.5 Cloudpermit warrants that it will not cause or permit any Customer Data to be collected, reproduced, stored or otherwise processed in any manner or for any purpose other than performance of Cloudpermit's obligations stated in this Agreement.
- 6.6 As between Customer and Cloudpermit, Customer is and shall remain the sole and exclusive owner of all right, title, and interest in and to Customer Data. Customer hereby grants to Cloudpermit a license to use and process Customer Data as necessary for performance of the Cloudpermit's obligations stated in this Agreement and the Customer's and End User's use of the Cloudpermit Software.
- 6.7 The Cloudpermit Software may provide external links to other sites on the internet, as a convenience for the Customer and End Users. Cloudpermit is not responsible for such linked destinations and such links do not imply Cloudpermit's association, affiliation, sponsorship or endorsement of the content, operation or security of any such linked destination.

- 6.8 Cloudpermit will provide a mechanism for the Customer to download and export Customer Data and End User Data during the Term of the Agreement to the fullest extent commercially reasonable in light of the circumstances that required such data recovery and restoration.
- 6.9 Upon termination of the Order Form for any reason, whether or not Customer has retrieved Customer Data, Cloudpermit reserves the right to permanently and definitively delete the Customer Data held in the Services thirty (30) days following termination of the Order Form.

7. IDENTIFIERS AND THEIR USE

- 7.1 Cloudpermit will deliver to the Customer identifiers necessary for access to and use of the Cloudpermit Software in accordance with this Agreement and any additional terms and conditions for use by End Users.
- 7.2 The Customer will be responsible for the use of the Cloudpermit Software by its employees, agents and End Users, including use of Identifiers. The Customer will notify Cloudpermit without delay if an Identifier has been disclosed to a third party or if the Customer suspects that an Identifier has been disclosed or otherwise misused.
- 7.3 Upon request by Cloudpermit, the Customer will change any Identifier for access to the Cloudpermit Software.
- 7.4 Cloudpermit may change any Customer Identifier and will provide prompt notice to Customer of such change.

8. DATA LOCATION

- 8.1 The servers used by Cloudpermit to provide the Cloudpermit Software and all data regarding the Cloudpermit Software will be hosted in the USA.

9. WARRANTIES

- 9.1 Each Party represents and warrants to the other Party that it has all required powers and capacity to enter into this Agreement, to grant the rights and license granted under this Agreement, and to perform its obligations under this Agreement.
- 9.2 The Customer represents, warrants and covenants to Cloudpermit that the Customer owns or otherwise has, and will have, the necessary rights and consents in and relating to the Customer Data and End User Data so that, as received by Cloudpermit and processed in accordance with this Agreement, neither Party and will infringe, misappropriate or otherwise violate any intellectual property rights, or any privacy or other rights of any third party or violate any applicable law.
- 9.3 EXCEPT FOR THE EXPRESS WARRANTIES STATED IN THIS AGREEMENT, ALL SOFTWARE, SERVICES AND MATERIALS PROVIDED BY ONE PARTY TO THE OTHER HEREUNDER ARE PROVIDED "AS IS". CLOUDPERMIT HEREBY DISCLAIMS ALL CONDITIONS AND WARRANTIES, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE UNDER THIS AGREEMENT, AND CLOUDPERMIT SPECIFICALLY DISCLAIMS ALL IMPLIED CONDITIONS AND WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AND ALL WARRANTIES ARISING FROM COURSE OF DEALING, USAGE OR TRADE PRACTICE.

10. OWNERSHIP AND INTELLECTUAL PROPERTY RIGHTS

- 10.1 The Customer acknowledges that, as between the Customer and Cloudpermit, Cloudpermit owns all right, title, and interest, including all intellectual property rights, in and to the Cloudpermit Software. The Customer and End Users are granted only a limited right to use the Cloudpermit Software during the term of this Agreement in accordance with this Agreement and the additional terms and conditions for use by End Users.
- 10.2 If the Customer or any of its employees or contractors sends or transmits any communications or materials to Cloudpermit by mail, email, telephone, or otherwise, suggesting or recommending changes to the Cloudpermit Software, including without limitation, new features or functionality relating thereto, or any comments, questions, suggestions, or the like, Cloudpermit is free to use and incorporate such feedback irrespective of any other obligation or limitation between the Parties governing such feedback for any purpose whatsoever and without any requirement to pay any compensation to the Customer or to any other person or entity.
- 10.3 If any part of the Cloudpermit Software is, or in Cloudpermit's reasonable opinion is likely to be, claimed to infringe, misappropriate or otherwise violate any third party intellectual property right, or if the Customer's or any End User's use of the Services is enjoined or threatened to be enjoined, Cloudpermit may, at its option and sole cost and expense: (a) obtain the right for the Customer to continue to use the Cloudpermit Software materially as contemplated by this Agreement; (b) modify or replace the Cloudpermit Software, in whole or in part, to seek to make the Cloudpermit Software (as so modified or replaced) non-infringing, while providing materially equivalent features and functionality, in which case such modifications or replacements will constitute the Cloudpermit Software as provided under this Agreement; or (c) by written notice provided sixty (60) calendar days in advance to the Customer to terminate this Agreement with respect to all or part of the Cloudpermit Software (providing a pro-rated refund for any prepaid access to the Cloudpermit Software) and require the Customer to immediately cease any use of the Cloudpermit Software or any specified part or feature thereof.

11. INDEMNITY

- 11.1 Each party will indemnify, defend and hold harmless the other Party and its officers, directors, employees, agents, successors, subcontractors, attorneys, affiliates and assigns from and against any and all losses, damages, liabilities, claims, penalties, fines, costs or expenses of whatever kind, including legal fees, disbursements and charges, and the cost of enforcing any right to indemnification and the cost of pursuing any insurance providers incurred by a Party to the extent arising out of or relating to: (a) any claim by a third party that a Party's acts or omissions with respect to the Cloudpermit Software infringes a third party's intellectual property right, provided that the foregoing obligation does not apply to any claim arising out of or relating to any access to or use of the Cloudpermit Software in a manner contrary to this Agreement or the additional terms and conditions for use by End Users available at www.cloudpermit.com as may be amended from time to time, or contrary to any instructions provided by Cloudpermit regarding use of the Cloudpermit Software or use of the Cloudpermit Software in combination with any hardware, system, software, network or other materials or service not provided or authorized by Cloudpermit; (b) the indemnifying Party's breach of this Agreement; or (c) the indemnifying Party's negligence or willful misconduct in connection with this Agreement.

12. LIMITATION OF LIABILITY

- 12.1 IN NO EVENT WILL EITHER PARTY BE LIABLE TO THE OTHER PARTY IN CONTRACT, TORT OR OTHERWISE, WHATEVER THE CAUSE THEREOF, FOR ANY LOSS OF PROFIT, BUSINESS, REVENUE OR GOODWILL, DAMAGES CAUSED BY DELAYS, OR A FAILURE TO REALIZE EXPECTED SAVINGS, OR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, INCIDENTAL, EXEMPLARY, AGGRAVATED OR PUNITIVE COST, DAMAGES OR EXPENSE OF ANY KIND, HOWSOEVER ARISING UNDER OR IN CONNECTION WITH THIS AGREEMENT OR THE CLOUDPERMIT SOFTWARE, WHETHER OR NOT SUCH DAMAGES, COSTS, LOSSES OR EXPENSES COULD REASONABLY BE FORESEEN OR WHETHER OR NOT THEIR LIKELIHOOD HAS BEEN DISCLOSED.
- 12.2 NEITHER PARTY SHALL BE LIABLE FOR THE DESTRUCTION, LOSS OR ALTERATION OF THE OTHER PARTY'S DATA OR DATA FILES, NOR FOR ANY DAMAGES AND EXPENSES INCURRED AS A RESULT, INCLUDING EXPENSES INVOLVED IN THE RECONSTRUCTION OF DATA FILES.
- 12.3 IN NO EVENT SHALL EITHER PARTY'S AGGREGATE LIABILITY ARISING OUT OF OR RELATED TO THIS AGREEMENT, WHETHER ARISING OUT OF OR RELATED TO BREACH OF CONTRACT, TORT (INCLUDING NEGLIGENCE) OR OTHERWISE, EXCEED THE AGGREGATE AMOUNT PAID OR PAYABLE TO CLOUDPERMIT PURSUANT TO THIS AGREEMENT DURING THE SIX (6) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO THE CLAIM. MAXIMUM LIABILITY SHALL BE SIX (6) MONTHS OF THE ANNUAL SUBSCRIPTION FEE.
- 12.4 NOTWITHSTANDING THIS SECTION 12, NOTHING IN THIS AGREEMENT SHALL LIMIT EITHER PARTY'S LIABILITY FOR DELIBERATE BREACH, DELIBERATE DEFAULT, WILLFUL MISCONDUCT OR GROSS NEGLIGENCE.

13. CONFIDENTIALITY

- 13.1 In connection with this Agreement each Party (as the "Disclosing Party") may disclose or make available Confidential Information to the other Party (as the "Receiving Party"). "Confidential Information" means information in any form or medium (whether oral, written, electronic or other) that the Disclosing Party considers confidential or proprietary, including, information consisting of, or relating to, the Disclosing Party's technology, trade secrets, know-how, business operations, plans, strategies, customers and pricing and information with respect to which the Disclosing Party has contractual or other confidentiality obligations, in each case whether or not marked, designated or otherwise identified as "confidential".
- 13.2 Confidential Information shall not include any data or information: (i) that, at the time of disclosure, is in or, after disclosure, becomes part of the public domain, through no act or failure on the part of the Receiving Party; (ii) that, prior to disclosure by the Disclosing Party, was already in the possession of the Receiving Party, as evidenced by written records kept by the Receiving Party in the ordinary course of its business, or as evidenced by proof of actual prior use by the Receiving Party; (iii) that was independently developed by the Receiving Party, by persons having no direct or indirect access to the Disclosing Party's Confidential Information provided that the Receiving Party provides clear and convincing evidence of such independent development; or (iv) which, subsequent to disclosure, is obtained from a third person: (A) who is lawfully in possession of the such information; (B) who is not in violation of any contractual, legal, or fiduciary obligation to either Party, as applicable, with respect

to such information; and (C) who does not prohibit either Party from disclosing such information to others; (v) is further disclosed with the prior written consent of the Disclosing Party, but only to the extent of such consent; or (vi) is a disclosure required by state or federal open records laws or a disclosure ordered by a court or similar adjudicator or authority.

- 13.3 Each Party will, and will cause its employees, agents and contractors to hold Confidential Information of the other Party in confidence, and will use the same degree of care by instruction, agreement or otherwise, to maintain the confidentiality of the other Party's Confidential Information that it uses to maintain the confidentiality of its own Confidential Information, and with at least a reasonable degree of care commensurate with the nature and importance of such Confidential Information. Each Party agrees not to make use of Confidential Information other than for the exercise of rights or the performance of obligations under this Agreement, and not to release, disclose, communicate or make it available to any third person other than employees, agents and contractors of any Party or third party who reasonably need to know it in connection with the exercise of rights or the performance of obligations under this Agreement.
- 13.4 In the event that a Party receives a request to disclose all or any part of the Confidential Information under the terms of a valid and effective subpoena or order issued by a court of competent jurisdiction or by a governmental authority, such Party will: (i) immediately notify the other Party of the existence, terms and circumstances surrounding such a request; (ii) consult with the other Party on the advisability of taking legally available steps to resist or narrow such request; and (iii) if disclosure of such Confidential Information is required, exercise reasonable efforts to obtain an order or other reliable assurance that confidential treatment will be accorded to such portion of the disclosed Confidential Information which the other Party so designates.
- 13.5 Each Party acknowledges and agrees that any unauthorized use or disclosure by it of any of the other Party's Confidential Information, in whole or part, will cause irreparable damage to the Disclosing Party, that monetary damages would be an inadequate remedy and that the amount of such damages would be extremely difficult to measure. The Receiving Party agrees that the Disclosing Party shall be entitled to seek temporary and permanent injunctive relief to restrain the Receiving Party from any unauthorized disclosure or use. Nothing in this Agreement shall be construed as preventing the Disclosing Party from pursuing any and all remedies available to it for a breach or threatened breach of this Agreement, including the recovery of monetary damages from the Receiving Party.
- 13.6 Cloudpermit is entitled to identify the Customer as a user or former user of the Cloudpermit Software without violating any confidentiality obligation.

14. TERM AND TERMINATION

- 14.1 This Agreement commences on the date of its execution by the Customer and will continue in effect for the term stated in the Order Form unless terminated earlier under any of this Agreement's express provisions.
- 14.2 Either Party may terminate this Agreement by giving written notice to the other Party upon the occurrence of any of the following: (a) the other Party defaults with respect to a material obligation under this Agreement and does not remedy that default within

ten (10) Business Days after receiving written notice of the default; or (b) the other Party: (i) makes a general assignment for the benefit of its creditors; (ii) has issued against it a bankruptcy order or otherwise becomes subject to any involuntary proceeding under any domestic or foreign bankruptcy law; or (iii) commences or institutes any application, proceeding or other action under any law relating to bankruptcy, insolvency, winding-up, reorganization, administration, plan of arrangement, relief or protection of debtors, compromise of debts or similar laws. Termination related to such assignment or bankruptcy will not result in any penalties or liability to either Party.

- 14.3 Upon the expiration or termination of this Agreement, except as expressly otherwise provided in this Agreement: (a) all rights, grants of rights, licenses, consents and authorizations by either Party to the other will immediately terminate; (b) notwithstanding anything to the contrary in this Agreement, with respect to Confidential Information then in its possession or control: (i) the Receiving Party may retain the Disclosing Party's Confidential Information in its then current state and solely to the extent and for so long as required by applicable law, (ii) Cloudpermit may retain Customer Data in its backups, archives and disaster recovery systems until such Customer Data is deleted in the ordinary course of its business, (iii) all information described in this Agreement will remain subject to all confidentiality, security and other applicable requirements of this Agreement; and (c) Cloudpermit may disable all Customer and End User access to the Cloudpermit Software.
- 14.4 Termination or expiration of this Agreement will be without prejudice to any rights, remedies or obligations of the Parties accrued under this Agreement prior to termination or expiration.

15. FORCE MAJEURE

- 15.1 Neither Party will be liable for failure to fulfill, or for delay in fulfilling, its obligations required hereunder due to a Force Majeure Event.
- 15.2 The Party whose performance under this Agreement is prevented or delayed by a Force Majeure Event will advise the other Party by notice in writing of the occurrence of the Force Majeure Event as soon as possible and shall do all things reasonably possible to mitigate any loss being caused to the other Party by reason of the Force Majeure Event, and will notify the other Party of the termination of the Force Majeure Event.

16. NOTICES

- 16.1 Every notice or other communication between the Parties will be deemed to have been given and made if in writing and if served by personal delivery upon the Party for whom it is intended, when sent by registered or certified mail, return receipt requested, or by a national courier service, or if sent by email (receipt of which is confirmed) to the Customer's and Cloudpermit's contact persons as stated in the Order form.
- 16.2 Any such notification will be deemed to have been delivered: (a) upon receipt, if delivered personally; (b) on the next Business Day, if sent by national courier service for next business day delivery or if sent by email and (c) in five Business Days if sent by mail when the actual time of receipt is not otherwise shown by the postal system. Any correctly addressed notice or last known address of the other Party that is reasonably relied upon that is refused, unclaimed, or undeliverable because of an act

or omission of the Party to be notified shall be deemed effective as of the first date that said notice was refused, unclaimed, or deemed undeliverable by the postal authorities by mail, through messenger or commercial express delivery services.

17. ASSIGNMENT

- 17.1 Neither Party may assign or transfer this Agreement or any right under this Agreement without the prior written consent of the other Party, except to an Affiliate or successor in interest by merger, acquisition or reorganization.

18. AMENDMENTS AND WAIVERS

- 18.1 No amendment to this Agreement will be valid or binding unless it is made in writing and executed by all Parties. No waiver of any breach of any provision of this Agreement will be effective or binding unless made in writing and signed by the Party purporting to give any waiver and, unless otherwise provided, any waiver will be limited to the specific breach waived.

19. SEVERABILITY

- 19.1 If a provision of this Agreement is or becomes invalid, ineffective or unenforceable, the validity, effectiveness or enforceability of the remaining provisions will remain unaffected. The Parties will negotiate in good faith to replace the invalid, ineffective or unenforceable provision immediately with a valid, effective or enforceable provision which comes as close as possible to the spirit and purpose of the provision to be replaced.

20. APPLICABLE LAW AND DISPUTES

- 20.1 This Agreement is governed by the laws of the state in which the Customer is located excluding any conflict of law rule or principle of such laws that might refer such interpretation or enforcement to the laws of another jurisdiction. Each Party submits to the jurisdiction of the applicable court(s) in such location with respect to any matter arising under this Agreement.

21. CONTINUING TO PERFORM

- 21.1 Except in the event of termination of this Agreement pursuant to its terms, during a dispute or notice or cure period, Cloudpermit will continue to fulfill all its obligations under this Agreement, and Customer will continue to make all payments required by the Agreement.

22. ENTIRE AGREEMENT

- 22.1 This Agreement is the complete agreement between the Parties concerning the subject matter of this Agreement and replaces any prior oral or written communications between the Parties. There are no conditions, understandings, agreements, representations, or warranties expressed or implied, that are not specified in this Agreement including, without limitation, the Order Form. In the event and to the extent of an inconsistency or conflict between any of the terms of this Agreement, including its appendices, and any other documents incorporated herein by reference,

the conflict or inconsistency shall be resolved by giving those provisions and documents the following order of descending precedence: (1) the Order Form; (2) this Software Service Agreement; (3) any Appendices; (4) any other document referenced by this Agreement or agreed to by the Parties, unless it expressly and specifically replaces or modifies any of the prior documents, in whole or in part.

23. RELATIONSHIP

- 23.1 The Parties are independent contractors and no other relationship is intended. Nothing herein shall be deemed to constitute either Party as an agent, representative or employee of the other Party, or both Parties as joint venturers or partners for any purpose. Neither Party shall act in a manner that expresses or implies a relationship other than that of independent contractor. Each Party shall act solely as an independent contractor and shall not be responsible for the acts or omissions of the other Party. Neither Party will have the authority or right to represent nor obligate the other Party in any way except as expressly authorized by this Agreement.

24. NO THIRD PARTY BENEFICIARIES

- 24.1 This Agreement is for the sole benefit of the Parties and their successors and assigns and nothing herein, express or implied, is intended to or shall confer upon any other person any legal or equitable right, benefit or remedy. End Users may benefit from their use of the Cloudpermit Software, but End Users' relationships to the Parties are not defined by this Agreement because they are defined solely: (a) to Cloudpermit by the terms and conditions for use by End Users available at www.cloudpermit.com as may be amended from time to time; and (b) to the Customer by separate agreement(s), if any, between the Customer and End Users.

25. EXECUTION

- 25.1 ***This Agreement must be executed simultaneously in two separate places:*** (1) on the Order Form; and (2) in the signature block below (both documents must be signed by the Customer before execution of this Agreement is complete). They may be executed in two or more identical counterparts, or by way of facsimile and electronic transmission without any further exchange of documents containing original signatures, each of which when executed by a Party will be deemed an original and such counterparts together will constitute one and the same Agreement.

CUSTOMER NAME: _____

Signature: _____

**Printed Name of
Person Signing:** _____

Title: _____

Date: _____

☐ I confirm that I have received and read all applicable product descriptions.

By signing here, the Customer agrees to the Order Form, this Software Service Agreement and any other appendices and documentation expressly referenced in the Order Form, this Software Service Agreement and/or any amendments (together the "**Agreement**").

The individual signing this Agreement represents and warrants that he or she has the right and authority to bind the Customer.

Signature: _____ **Cloudpermit**

**Printed Name of
Person Signing:** _____ **Jarkko Turtiainen**

Title: _____ **SVP North America**

Date: _____



CLOUDPERMIT IMPLEMENTATION MODEL



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CLOUDPERMIT IMPLEMENTATION DESCRIPTION

The implementation model, described herein, details the proven model used to implement the various products offered by Cloudpermit for a new public-facing solution for the Customer. This is accomplished through a five-stage implementation process: Stage 1 – Kickoff, Stage 2 – Workshop, Stage 3 – Configuration, Stage 4 - Training & Testing and Stage 5 - Go Live.

The product(s) to be implemented is identified on the approved order form and is inclusive of the functionality that is identified in the product specific documentation.

Any services not listed on the Order Form are considered out of scope and can only be added through an agreed upon change order.

IMPLEMENTATION TIMELINE

The implementation schedule for Cloudpermit is mutually agreed upon prior to the Kickoff meeting and documented with a project plan. Any modifications or extensions to the project plan will be requested through the customer's authorized representative and evaluated by Cloudpermit Head of Professional Services for review and discussion. If this modification or extension is granted, Cloudpermit will provide a change order to be signed by the Customer. Cloudpermit standard implementation timeline is detailed below.

Cloudpermit Estimated Project Timeline	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19
Building Department	5-6 weeks																		
By-Law or Code Enforcement						4-5 Weeks													
Planning Department										8-10 weeks									



To manage this timeline, Cloudpermit Implementation Specialist will establish a weekly meeting checkpoint to ensure the implementation is on track and weekly action items are achieved.

IMPLEMENTATION MODEL

As part of the Implementation Model, Cloudpermit and the Customer will be responsible for performing tasks throughout the various stages of the implementation process. The following is a description of tasks needed to successfully complete the implementation of the Cloudpermit Product. For a more detailed description please refer to the Cloudpermit Implementation Methodology documentation.

Kickoff

A meeting between Cloudpermit and the Customers staff and key stakeholders to provide an overview of the product, discuss the goals and objectives and the agreed upon project schedule to establish a plan for a successful implementation.

Workshop

Cloudpermit solution is built on standard, out of the box, functionality. The workshop will ensure that the Implementation Specialist has a full understanding of the business processes, the details the municipality needs to collect from the applicant, fee schedules and any templates which needs to be generated. Cloudpermit standard out of the box solution integrates with ESRI ArcGIS through a REST(API) to establish the property location and also integrates with certain Payment Providers to allow for online payments. Cloudpermit encourages the use of 3rd party payment providers which are already integrated with Cloudpermit. The Implementation Specialist can provide a full list of the 3rd party payment providers, however, if the municipality uses another 3rd party vendor, then a custom integration is needed and could impact the schedule. This should be identified as soon as possible to minimize the impact to the schedule.

Note: Any Non-Standard Integrations are subject to additional Scope and costs.

Configuration

Configuration of Cloudpermit with the features and functionalities needed to allow the customer the ability to process applications using the online Cloudpermit solution.

Training & Testing

Cloudpermit Implementation Specialist will provide two (2) standard training sessions to key users of the system to ensure the customer can successfully test the product.

Additional Training: Cloudpermit's training is built to ensure the customer is ready to utilize the software to its full extent. In some cases, additional training is necessary during implementation or Post Go Live. The customer can order additional training according to Cloudpermit's price list.

Go Live

Go Live includes a Go/No Go decision prior to a scheduled Go Live meeting where the training environment configuration will be promoted to the production. At the Go Live meeting the customer will



submit their first Customer permit/application and/or create their first case in Cloudpermit to satisfy the Customers go live.

MILESTONES & ACCEPTANCE CRITERIA

Milestones are used for acceptance of various steps within the Implementation process. At the completion of each milestone the client will receive a Milestone Acceptance Document to be signed accepting that the tasks provided within each milestone have been completed. It is agreed that the Customer will accept each Milestone, unless such Milestone contains a “go live blocker” defect and Customer so notifies Cloudpermit, in writing, within 5 business days of the Milestone Acceptance Request. Milestones that do not receive notification of non-acceptance within 5 business days will be deemed accepted.

Milestone Number	Milestone Description	Billable Amount
M1	Project Plan Acceptance	50%
M2	The kickoff, configuration, and 1 st training sessions has been completed	50%
	Go Live tasks have been completed and the first permit/application is entered in Cloudpermit production Environment.	

Once Cloudpermit has provided corrections, Customer will have Seven (7) business days to verify that the corrections are sufficient and to provide written notice of any failure to correct a Go Live Blocker. If no written notification is provided, the corrections and the Milestone will be deemed accepted.

Cloudpermit will correct all Go Live Blockers as described above and handle Post Go Live issues within a reasonable Post Go Live window. All other Defects will be tracked for potential future releases. Notice of any Go Live Blocker defect must be provided to Cloudpermit in writing.

CHANGE MANAGEMENT

Cloudpermit Implementation Model provides a comprehensive, fully inclusive approach to implement the Cloudpermit solution. During the implementation process, additional needs may be identified for the Customer, that are outside of the project scope. These items once identified will be managed through a Change Request. The Change Order will identify the request, detail the requirements and justification and any scheduling or cost implications resulting from the change Request.

ADDITIONAL SERVICES COST

Additional Services are available from the Professional Services team that may not be included in the previously agreed upon scope. Cloudpermit can provide additional services as per the price list and through a change order

For on-site meetings, travel and per diem expenses will be invoiced to the Customer in accordance with Cloudpermit Travel Policy which will include airfare, mileage, hotel accommodations and daily per diem.

A woman wearing a white hard hat and a high-visibility safety vest over a plaid shirt is shown in profile, looking at a tablet device. The background is dark with some blurred lights, suggesting an outdoor construction or industrial setting at night. The overall image has a blue tint.

Cloudpermit Building Permitting Product Description 2023

Cloudpermit 
Products |

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General Description

Cloudpermit is online community development software that provides local governments with Software-as-a-Service (SaaS) products available 24/7.

The Cloudpermit product portfolio includes Building Permitting, Planning, Land Use Permitting, and Code Enforcement products.

This product description applies to Building Permitting product.

The information in this document is subject to change without notice aligning with future releases. Releases supply information about new features and non-security updates.

Cloudpermit Core Benefits

Cloudpermit supplies one complete end-to-end product for local governments to manage the entire building, licensing, and planning e-permitting and code enforcement case process. It allows all parties integral to the process, from applicants to authorities to key stakeholders. This ensures that all parties receive real-time information about applications, licenses, and cases.

Below are described the primary benefits Cloudpermit provides to its customer base:

- ⇒ Cloudpermit standardizes local government's building, licensing, planning, and code enforcement processes by supplying the best digital practices.
- ⇒ The 24/7 online service on any browser or operating system allows remote and mobile work on-site.
- ⇒ Monthly releases enable automatic updates to the product providing the latest updates and enhancements while not requiring users to download or install any software files.
- ⇒ A cloud-based SaaS product provides a quick and easy implementation with a municipality-based configuration, lessening the burden on municipal resources.
- ⇒ Through interactive maps, local governments can use high-quality location data and up-to-date property information. This up-to-date property information is derived directly from the local government's Geographic Information System (GIS).
- ⇒ Workspaces enable instant collaboration and communication within applications and code enforcement cases, simultaneously speeding up processes and improving the workflow for all involved parties.

Cloudpermit Building Permitting

The Building Permitting product supplies online applications for public builders and municipal building authorities. The product is accessible on any browser and mobile device with an Internet connection.

The Building Permitting product enables the following features:

- ⇒ It provides end-to-end, online software for local government building department customers, which helps them to manage applications efficiently and effectively.
- ⇒ It allows the public to submit and track their building applications online.
- ⇒ It helps streamline processes associated with the day-to-day responsibilities of building departments.
- ⇒ It offers unique features to assist with pre-consultation, application reviews, inspections, permit issuance, and much more.

The Cloudpermit software is automatically updated periodically with the latest updates and enhancements, not requiring users to download or install any software files.

Cloudpermit Common and Building Permitting Features

Cloudpermit comprises unique features standard throughout the product. These include **Registration and Login, Dashboard, Workspace, Configuration tools, Interactive Maps, and Messaging.**

Cloudpermit Common Features:
Cloudpermit Registration and Login
Cloudpermit Dashboard
Cloudpermit Workspace
Configuration Tools
Interactive Maps
Messaging

The Building Permitting software provides **Pre-Consultation, Review Management, Circulation, Inspections, Fees Management, and Report Management** features to enhance an excellent user experience in the building workflow.

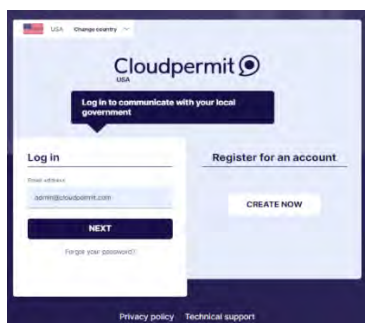
Cloudpermit Building Permitting features:
Pre-Consultation
Review Management
Circulation
Inspections
Fees Management
Report Management

Cloudpermit Registration and Login

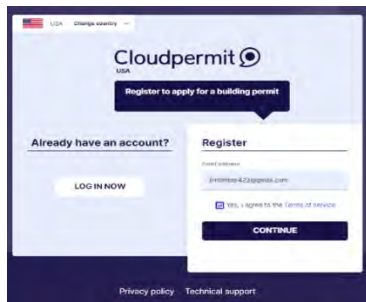
Cloudpermit maintains one centralized login function supplying the same functionality for public users and municipal authorities.

The login can be integrated with the organization's Active Directory (option) or a third-party Multi-Factor Authentication (MFA).

Municipal authorities will receive the Cloudpermit User ID during the product configuration.



A public user must first register the Cloudpermit account to the service. Through registration, the user is guided through a draft application to ensure an understanding of functionality.



Cloudpermit Dashboard

The Cloudpermit dashboard displays high-level information in a compact view. It enables new application creation, tracking user notifications and action requests, and searching, sorting, and filtering workspaces at each application lifecycle stage.

The dashboard includes the "Tasks and requests" view that notifies users about action requests.

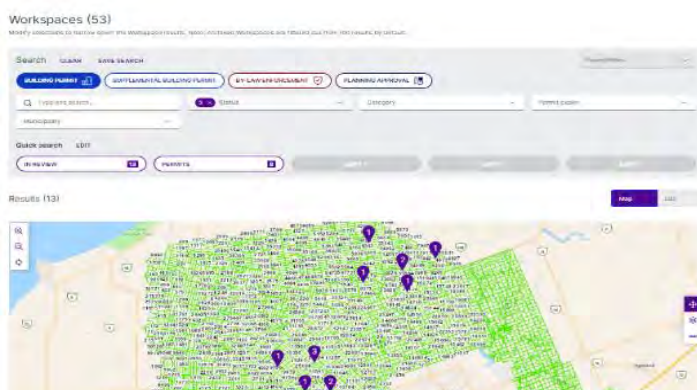


The dashboard allows applicants and municipal authorities to search and filter properties, applications, and code enforcement cases using various preconfigured search criteria.

The "Results" section shows the filtered workspaces in a list mode or a map view according to a user's choice.

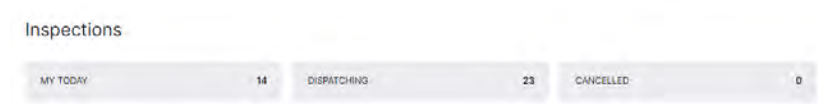
- ⇒ In the map view, the users can adjust their map by zooming in/out or choosing different layers to display the property location.
- ⇒ The list view shows the results as cards with the selected essential information of each workspace.

The "Results" section with a map view.



The primary navigational and functional elements are the same for applicants and municipal authorities in their dashboard in Cloudpermit. However, municipal authorities have additional features, like the **Inspections** section with quick access links to **My today**, **Dispatching**, and **Cancelled** inspections workspaces.

The quick access links in the user dashboard.

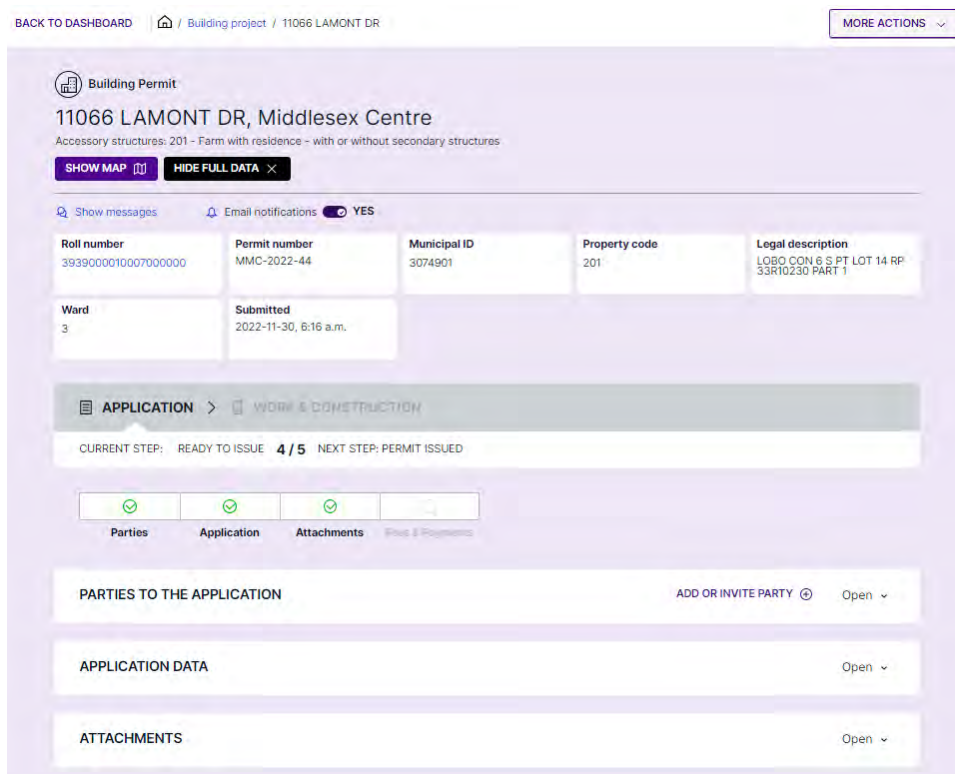


Cloudpermit Workspace

The Cloudpermit workspace is the core collaborative space for adding, updating, changing, uploading, and storing application and project information.

Each workspace holds the processes, functionality, and data fields necessary to manage, approve, and issue building and planning applications and code enforcement cases.

The “Building Permit” application workspace.



Interactive Maps

All Cloudpermit users can benefit from the interactive maps within Cloudpermit.

The interactive maps enable applicants to search for properties by address, roll number, PIN, or PID, enter property details manually, or map properties on the interactive map during the application creation.

Cloudpermit displays the property on a map with the location details.

Location for the application

Select a property for the application. Search by address or roll number or point to a location on the map. If the subject land consists of more than one property, additional properties are added later.

Middlesex Centre, Ontario

Q 10187 GREYSTAD DR X



Address
10187 GREYSTAD DR

Property details
Roll number: 3939000030205000000
Municipal ID: 3544736
Property code: 261 - Land owned by a non-farmer improved with a non-farm residence with a portion being farmed

Other information
Ward: 3
Legal description: CON 11 N PT LOT 7

CANCEL BACK NEXT →

On the department side, the GIS integration aids municipal authorities in selecting permit and inspection working areas, planning routes, and navigating optimal driving instructions for inspectors with a Google Maps integration. The map integration allows municipal authorities to read and accurately calculate property size, display information, and assign different sites based on locations and zones.

Messaging

The Messages feature is for all users and stakeholders. Built into each application, users can send, reply, and follow an application's public (messages visible to all users) or direct (messages visible to selected recipients) workspace messages within the application.

This real-time communication can remarkably speed up the application process for all parties associated with the application.

The workspace for public messages.

Workspace messages CLOSE X

Public Direct

Participants
Alice Administrator AUTHORITY, Sofia Doc

APPLICATION +

Sofia Doc 2022-02-17, 8:50 a.m.
Hi, do I need to provide more building drawings to my application?
REPLY

You AUTHORITY 2022-02-17, 9:51 a.m.
Hi Sofia, thank you for your message. Your attachments are OK. No other drawings are needed.
REPLY

Write new message here

Pre-Consultation

Pre-consultation is a pre-application step that is usually voluntary for building applicants. However, local governments may configure it as a mandatory step for specific application types.

Suppose pre-consultation is not mandatory in the selected building application type. In that case, applicants may decide during the application creation if they wish to have pre-consultation for their building plans. The pre-consultation option is available after selecting the application type, category, work type, and target for the draft application.

The applicant requests a pre-consultation in the application.

Select category, type and target for your application

Good to know

Describe the purpose of your application with the category, work type, and work target selections. The requirements and the process for your application in Cloudpermit will be set up based on your selections. Click on each category to see detailed definition of the category.

Category

- Accessory structures
- Change of use
- Combined use
- Demolition
- Heating
- Plumbing
- Pools
- Residential building
- Sewage system
- Short-term accommodation

Work type

Work target

Good to know

An Accessory structure includes the construction, alteration, addition to, or repair of a building accessory to a principal building. Examples: Deck, Gazebo, Porch, Ramp or Shed.

Do you require pre-consultation before a permit application?

YES **NO**

Note: Answering "yes" will start a pre-consultation process instead of a permit application.

CANCEL BACK NEXT →

The pre-consultation process includes one or more interactive meetings arranged through Cloudpermit. In that way, applicants and their authorized representatives can present and discuss their development proposal with relevant staff and external agencies within the local government well advanced of the project start. Cloudpermit enables municipalities to track and document their pre-consultation process digitally.

The pre-consultation process is as follows:

- ⇒ Applicants request a pre-consultation through a guided step-by-step process in Cloudpermit. The pre-consultation usually includes one or more meetings between the parties, which the municipal building authorities set up via Cloudpermit.
- ⇒ Upon meeting completion, the municipal building authority prepares a pre-consultation report and a draft approval application with requirements for the applicants to submit to the municipality in Cloudpermit.

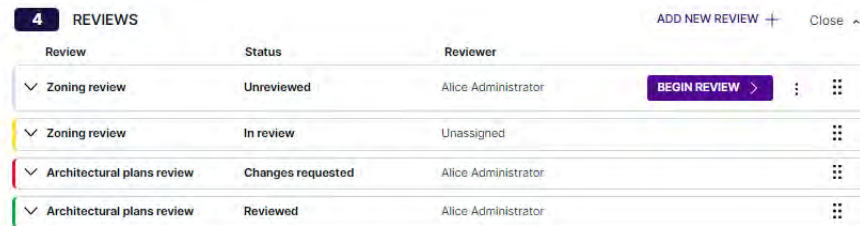
Review Management

The Review Management is for municipal authorities.

Cloudpermit enables municipal authorities the management of application submission reviews by providing a variety of review types that municipal administrators can configure for relevant application reviewers in Cloudpermit.

Municipal authorities assess each application and its plans after they are submitted. If the application requires extra reviews, municipal authorities request them from the appropriate reviewers. After completing evaluations, reviewers mark the forms and attachments evaluated as complete. If the application requires revisions from the applicant, a change request will be sent to the applicant.

The Reviews section in the building application workspace.



Review	Status	Reviewer	
▼ Zoning review	Unreviewed	Alice Administrator	BEGIN REVIEW > ⋮
▼ Zoning review	In review	Unassigned	⋮
▼ Architectural plans review	Changes requested	Alice Administrator	⋮
▼ Architectural plans review	Reviewed	Alice Administrator	⋮

When a change is requested for the application, Cloudpermit creates a task for applicants, which appears in the dashboard's Task and requests section. Applicants will also be notified via email about the change request.

After providing the required changes for the application, municipal authorities verify them. Also, the review result, notes, and time used are recorded in Cloudpermit. After completing all required application reviews, municipal authorities create a permit on configurable templates in Cloudpermit.

Circulation

Circulation is an essential part of processing workspaces within Cloudpermit.

Cloudpermit allows municipalities to decide which internal and external organizations, agencies, and corporations may participate as stakeholders in the Circulation process and add them to the municipality's approver groups in Cloudpermit.

In practice, the responsible municipal authority circulates the building application to the stakeholders, such as fire, water, or sewerage departments requesting comments or approvals in Cloudpermit. This way, comments and approvals can be requested from all stakeholders concurrently, which speeds up the approval processes.

Cloudpermit supplies user management and task assignment functionalities for stakeholder organizations to manage requests and internal circulation. However, the municipal building department's authorities can control who can see the original comments online. Cloudpermit also notifies the assigned circulation authorities or organization's administrators of new circulation requests and approaching due dates.

Additionally, Cloudpermit allows municipal department authorities to complete the circulation request on the stakeholders(s) behalf and record their results in Cloudpermit. That way, Cloudpermit can help municipal authorities ensure all circulations are accurately recorded on Cloudpermit and save time.

The municipal building authority completed the circulation request.

CIRCULATION		ADD CIRCULATION REQUEST ⓘ Close ^		
Status	Assigned to	Request	Due date	Completed
^ Complete	Middlesex Centre - Ministry of Municipal Affairs	2022-10-27, 9:48 a.m. by Alice Administrator	2022-10-28	2022-10-27 9:54 a.m.
Request description		Visibility Authorities and selected circulation assignee		
<p>"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."</p>				
Stakeholder comments				
<p>"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."</p>				
ADD COMMENT +				
		by Alice Administrator, 2022-10-27, 9:54 a.m.		

After circulation, the requesting municipal authority prepares and publishes a report to applicants, including received comments and approvals for the project.

Cloudpermit notifies the assigned circulation authorities or the organization's administrator of new circulation requests and approaching due dates.

Permit Issuance

The Permit Issuance feature is for municipal authorities.

The feature enables municipal authorities to **define, create, and issue permits** on pre-configurable templates. It also allows them to decide the project's required inspections and permit fees.

After completing reviews and acknowledging application payments, municipal authorities prepare the permit for issuance.

- ⇒ All issued permit PDFs are downloadable and saved in the application's "Permits" section in Cloudpermit.
- ⇒ Applicants and municipal authorities have access to all permits on the application anytime.

The "Permits" section in the building application workspace.

PERMITS

Close

Permit number	Issued on	Issued by	Status	Permit document
MMC-2022-10	2022-02-25, 10:33 a.m.	Alice Administrator	Issued	<div><div>DOWNLOAD PERMIT</div><div></div></div> <div><div></div><div>Signed by Fred Builder 2022-02-25, 10:33 a.m.</div></div>

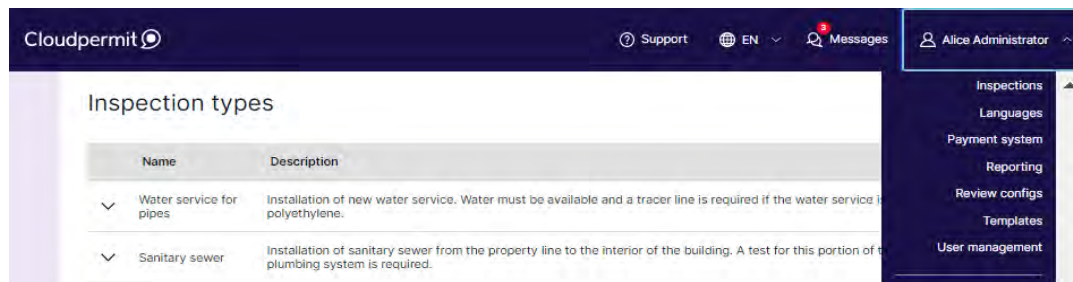
Inspections

A crucial component of Cloudpermit is the Inspections feature for municipal building authorities.

The Cloudpermit configuration enables municipal authorities to configure a set of default inspections for the selected application types.

They can manage inspections by adding new ones, removing unnecessary ones, and publishing a list of required inspections on each application they work on.

The inspections configuration workspace.



Applicants request inspections through the Inspections feature in their application in Cloudpermit and decide the date and time of the inspection.

Once the inspection request is dispatched to the relevant inspector, Cloudpermit allows building and planning inspectors to conduct on-site mobile inspections.

Inspectors only need to write their notes once, ensuring all data is available for all municipal authorities within the department online on any connected mobile device.

Inspectors have all permit information, property contact information, approved drawings, reports, and previous inspection data online in Cloudpermit.

Inspectors can do the following:

- ⇒ Manage deficiencies and orders online.
- ⇒ Upload photos to their inspection notes during the on-site visit.
- ⇒ Benefit from the configured templates while creating reports and certificates on-site.

All conducted inspections with the downloadable inspection report PDFs are recorded in the "All Visits" section in Cloudpermit.

The "All Visits" section in the inspection workspace.

ALL VISITS					Close
2		PASSED (SUBSTANTIALLY COMPLETE)	2022-09-01, 2:45 a.m.	Alice Administrator	Download inspection report
1		FAILED (NOT SUBSTANTIALLY COMPLETE) DEFICIENCIES	2022-09-01, 1:25 a.m.	Alice Administrator	Download inspection report

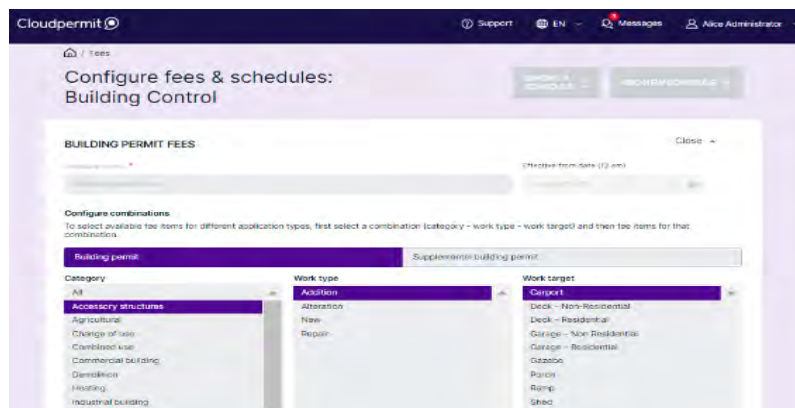
Fees Management

The Fees Management feature is for municipal authorities.

The feature is an all-in-one solution that allows Cloudpermit to manage permit and application fees. It facilitates payments made and received in person or online via native third-party integrations.

Municipality administrators create and process fees using preconfigured fee items. Additionally, Cloudpermit allows automation of fee calculation for deposits and upfront fees. The fee automation inserts the appropriately calculated fee for the bill to be paid online. Additionally, Cloudpermit automatically prepares and sends applicants a downloadable invoice PDF via email.

The fees and schedules configuration workspace.



The integrated online payment solution has the following benefits:

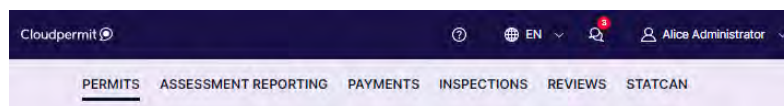
- ⇒ Online payment remarkably reduces on-premises cash payments because applicants can safely make payments online 24/7 and benefit from better transparency in their paid fees.
- ⇒ Online payment enables municipal authorities to automate permit delivery straight after the permit fee is acknowledged.

The selection of integrated online payment providers in Cloudpermit is limited. The third-party integration chapter on page 13 lists available integrated payment checkout systems.

However, Cloudpermit can integrate the payment process into local governments' payment checkout systems upon agreement (priced separately).

Report Management

The Report Management feature is for municipal authorities.



This feature provides customizable data exports for permits, payments, inspections, and review data. It also enables automatic assessment reporting for selected regions.

Processing time, review, and inspection reports reveal the organization's performance, supporting the process's improvement. The reporting data helps municipalities report issued permit numbers and types. It also provides a view of current open permits and in-progress applications.

Configuration Tools

According to the municipality's requirements, local government administrators have complete control of the service, including the Cloudpermit configuration.

Cloudpermit Building Permitting configuration enables the following:

- ⇒ Managing approver and user groups
- ⇒ Working application type configuration with requirements for each type
- ⇒ Configuring and managing inspections

- ⇒ Configuring and managing application fee items for schedules
- ⇒ Managing payment page settings
- ⇒ Supporting managing review configurations
- ⇒ Allowing automating notifications, for example, for permit expiry.
- ⇒ Managing language settings and selection in the user interface
- ⇒ Managing building document templates
- ⇒ Managing role-based permission in user management.

Cloudpermit also develops and sets various application templates and forms for municipal users.

Configuration Description

The tables below display the Building Permitting features configuration.

Configuration:

Section	Component	Description
Building permit categories	Category description	It allows changing the description of a category.
Building permit categories	Project types	It includes work categories, work types, and work targets.
Supplemental building permit	Categories	It allows the selection and editing of types of supplemental building permits.
Attachment types	Add a new attachment type	It includes available attachment types for permits.
Reviews and required forms, attachments, and review configs	Forms	The available forms will be added as required for any application type.
Permit numbering	Permit number	It allows assigning a numbering system to a municipality.

Fees Management:

Section	Component	Description
Fee schedule	Configuration	It includes a list of available fees specific to each client.
Other settings	Online payment	It allows configuring Cloudpermit to accept online payments from various service providers.

Inspections:

Section	Component	Description
Inspections	Time slots	Cloudpermit supports two timeslots for inspection scheduling: 8:00 - 12:00 p.m. and 12:00 p.m. - 4:00 p.m.

Inspection types	Inspection subtypes	Cloudpermit supports two inspection subtypes currently.
------------------	---------------------	---------------------------------------------------------

Templates:

Section	Component	Description
Templates	PDF Templates for inspections	It includes permit templates with customizable layouts.
Templates	PDF Templates for inspections	It includes template types.
Location for the application	Extra map layers	Cloudpermit can enable additional map layers for the client.

Application & Review:

Section	Component	Description
Sign off	Compliance language	It enables wording specific to country/province/state. Cloudpermit supports the following languages: en-ca, en-us, and fr-ca.

Cloudpermit Third-Party Integrated Systems

Cloudpermit has standard configurable integrations to over twenty (20) systems categorized under six different integration types described below.

Suppose the need for integration with a standard configurable integration cannot be fulfilled. In that case, Cloudpermit may integrate a new system, make a minor change to an existing one, or develop a custom one. These integrations are priced separately and, if applicable, addressed within your contract.

Standard Configurable Third-Party Integrations

Cloudpermit has integrations to third-party systems that can be configured for the client as part of the standard implementation. These integrations may include monthly or annual fees, which will be stated in a contract.

Geographic Information System (GIS)

Cloudpermit supports a one-way integration with the municipal authority's GIS to search properties by civic address or property identifier, retrieve property information, read map layers to be shown on maps, and retrieve owner information.

Supported GIS integrations include the following:

- ESRI ArcGIS
- CGIS
- CartoVista
- MuniSight

Online Payment

Cloudpermit integrates with most online payment providers through various online checkout systems or payment gateways to process fees and dues. Users can choose an online payment option for their bills when an online payment integration is configured for a municipality.

Payer information and bill contents are sent to the PCI-compliant payment provider and forwarded to the provider's checkout page. The payment provider returns information about the success of the payment. Where necessary (and possible), the convenience fees are configured in the payment system.

Supported Online Payment integrations include the following:

- Allpaid
- Bambora
- CCP/NIC Online Payment
- ePay
- E-xact
- Government Window
- Merchante
- Moneris
- OpenEdge
- Paymentus
- PayNowlink
- Square
- Stripe
- Payeezy

Authentication through Open ID Connect (OIDC)

When a user account is linked to an external system for authentication, Cloudpermit sends the authentication through an Open ID Connectivity (OIDC) API (Application Program Interface) to a third-party login page for the organization.

With this integration, the whole authentication happens in the third-party system, which returns a success of authentication to Cloudpermit. The integration does not include authorization; all groups and permissions are managed in Cloudpermit.

Supported OIDC authentication integrations include the following:

- Azure AD

Additional AD integrations are priced separately and, if applicable, addressed within your contract.

Multi-Factor Authentication (MFA)

When a Multi-Factor Authentication (MFA) is needed for a department, Cloudpermit login will require at least Two-Factor authentication.

After successful Cloudpermit authentication, the users will be sent to a third-party system for second-factor authentication, such as a mobile app or Security Management System (SMS).

The third-party system must supply an OIDC (Open ID Connect) interface, and it returns the success of the second-factor authentication to Cloudpermit.

Supported MFA integration includes the following:

- Duo

Additions and Minor Changes to Third-Party Integrations

Cloudpermit adds integrations with new systems if the integration is for an existing integration type, e.g., Online Payment or GIS. Cloudpermit has confirmed that the third-party system has Application Program Interfaces (APIs) that support the current integration model.

All integrations to new systems and minor changes to existing system integrations must be agreed upon separately, and they are not included in the standard implementation. Delivery may contain a development fee and an annual or monthly fee.

Cloudpermit will give an estimated future release for integration upon agreement.

Custom Integrations

All other integrations not Configurable Standard integrations, minor changes to existing integrations, or new systems with an existing integration type are considered Custom Integrations.

All custom integrations require a feasibility study and specifications before the agreement. Cloudpermit will give an estimated future release for integration upon agreement.

Delivery of a Custom Integration contains a development fee and an annual or monthly fee.

Integrations with Backend Systems

In backend system integrations, Cloudpermit leverages an integration process that enables sending the information to a backend system.

- ⇒ Cloudpermit creates a folder in the backend system for each workspace.
- ⇒ Cloudpermit links the properties and contacts into the folder and make new contacts if necessary.
- ⇒ Cloudpermit updates the folder's status and specified data fields in the folder.

Integration can be configured to include the transfer of fees to the backend system. Completed reviews and inspections can be configured to be transferred too. The integration setup will require changes in the backend system and mapping statuses and codes between the systems.

Integrated backend solutions are priced separately and, if applicable, addressed within your contract.

Integrations with Electronic Archives

This type of integration sends the content of a workspace to an external system for archival. The third-party systems are Enterprise Content Management (ECM) or Electronic Archives. Cloudpermit will create an archival folder in the third party, write the values of the configured data fields in the folder, and transfer configured attachments into the folder for archival.

Integrated electronic archive solutions are priced separately and, if applicable, addressed within your contract.



Contractor Registry

Software
Description
Guide 2023

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Cloudpermit Contractor Registration Product Guide

This document provides an overview of our Contractor Registration product, a component of the Cloudpermit product suite.

General Description

Cloudpermit provides an online community development software solution tailored for local governments, ensuring 24/7 accessibility. Our Software-as-a-Service (SaaS) products are crafted to streamline and optimize community development processes. The suite encompasses various domains within local government operations including:

- **Building Permitting:** Facilitate building permits issuance, inspections, and compliance management.
- **Planning:** Efficiently handle land-use planning and development applications.
- **Land Use Permitting:** Streamline land use permits approval and ensure zoning compliance.
- **Code Enforcement:** Manage code enforcement activities effectively.
- **Licensing:** Streamline the issuance and management of business licenses within your jurisdiction.
- **Contractor Registration:** This guide focuses on the Contractor Registration product, a tool for managing and verifying contractor credentials.

Cloudpermit Core Benefits

Cloudpermit unifies the entire process of building, licensing, planning e-permitting, and code enforcement case management under one digital roof. It brings all stakeholders - from applicants to authorities - onto a common platform, ensuring real-time updates on applications, licenses, and cases. Below are the primary benefits delivered by Cloudpermit:

- **Digital Standardization:** Cloudpermit embodies best digital practices, standardizing local government's operations in building, planning, code enforcement, and licensing.
- **24/7 Online Accessibility:** Accessible on any browser or operating system, facilitating remote and on-site mobile work.
- **Seamless Updates:** Monthly releases bring automatic updates, delivering the latest enhancements without the need for manual downloads or installations.
- **Swift Deployment:** A cloud-based SaaS product for quick and easy implementation, configured to match municipal requirements, hence easing the resource strain.
- **Interactive Maps:** Utilize high-quality location data and updated property information sourced directly from the local government's Geographic Information System (GIS).
- **Collaborative Workspaces:** Fosters instant collaboration and communication within applications and code enforcement cases, thus accelerating processes and improving workflows for all parties involved.

As you navigate through this guide, you'll find in-depth insights on how to make the most of the Contractor Registration product to manage and verify contractor credentials efficiently.

Cloudpermit Contractor Registration

Contractor Registration ('Registry') is a specialized module seamlessly integrated into Cloudpermit to facilitate efficient management of contractor information. Whether you're a local government official overseeing registrations or a contractor keen on establishing your presence, this module provides an intuitive platform for effortless interaction. Utilize the

Contractor Registration to maintain an updated database of contractors within your jurisdiction and allocate them to specific building permits with ease.

Important Note: *Information in this document may change without prior notice due to our continuous efforts to enhance our products in line with industry standards and valuable user feedback. Our regular releases, detailed within, will keep you informed about new features, enhancements, and non-security updates.*

We trust this Product guide will be an invaluable resource as you explore the Contractor Registration module. For any inquiries, challenges, or aid, feel free to contact our dedicated support team. We are here to aid you in maximizing the benefits of Cloudpermit's offerings for your community development needs.

Contractor Registration Application Creation Wizard

The Cloudpermit Contractor Registration ('Registry') product provides a simple user interface for creating, applying for, reviewing, managing, and issuing business registrations.

Beginning the application creation

Since registry applications in Cloudpermit are not associated with projects, and some registry applications do not have a specific address or property, the application creation wizard accessible from the user dashboard assists applicants in creating the appropriate workspace for the registry application.

The screenshot shows the 'My dashboard' interface in the Cloudpermit application. At the top, there is a dark blue header with the Cloudpermit logo, a 'Support' link, a 'Messages' link, and a user profile for 'Jim Timber'. Below the header, the 'My dashboard' section is highlighted in light purple. On the right side of this section are two buttons: 'GO TO WORKSPACE' and 'CLOSE'. The main content area displays a two-step wizard. Step 1, 'Select city', features two dropdown menus with 'Illinois' and 'Boone County' selected. Step 2, 'Select type of application', presents three selectable options, each with an icon and a brief description: 'Building Permit' (house icon), 'Contractor Registration' (person with hard hat icon), and 'Licensing' (document with magnifying glass icon).

Applicants will choose the state and municipality to which they will submit their application. As a result, applicants can only submit application types permitted in the selected municipality.

Applicants will select the registry category and trade(s) that best describes the purpose of their applications in the "Create a New Application" workspace. These choices will determine the application's requirements and process in Cloudpermit. **NOTE:** Create a new application

Good to know

Describe the purpose of your application with the type of registration and trades. The requirements and the process for your application in Cloudpermit will be set up based on your selections. Click on each registration type to see detailed definition of the type.

Type of registration

- ☒ New registration
- ☐ Renew registration

Trade

- ☐ Air Conditioning Contractor
- ☒ Building Contractor
- ☒ General Contractor
- ☐ Mechanical Contractor
- ☒ Plumbing Contractor
- ☐ Pollutant Storage Contractor
- ☐ Pool/Spa Contractor
- ☐ Precision Tank Tester
- ☐ Residential Contractor
- ☐ Roofing Contractor

An applicant can select multiple trades in one application.

Within Cloudpermit, the contractor can be a private individual or a business. Furthermore, authorities can also apply for registrations on behalf of their customers. Municipalities can also create an online copy for those applications sent by paper or email.

Draft Contractor Registration application workspace

Once a contractor's application data is in place, applicants will be redirected to the draft contractor registration ('registry') application workspace. The "Required Tasks" progress bar displays the actions the applicant must take to complete and submit the registry application. These actions are related to the selected registry category type.

Contractor Registration

New registration

Show messages Email notifications ☒ YES

Building Contractor General Contractor Plumbing Contractor

ADD TRADE

APPLICATION

CURRENT STEP: DRAFT 1 / 5 NEXT STEP: SUBMITTED

REQUIRED TASKS

Parties Application Attachments

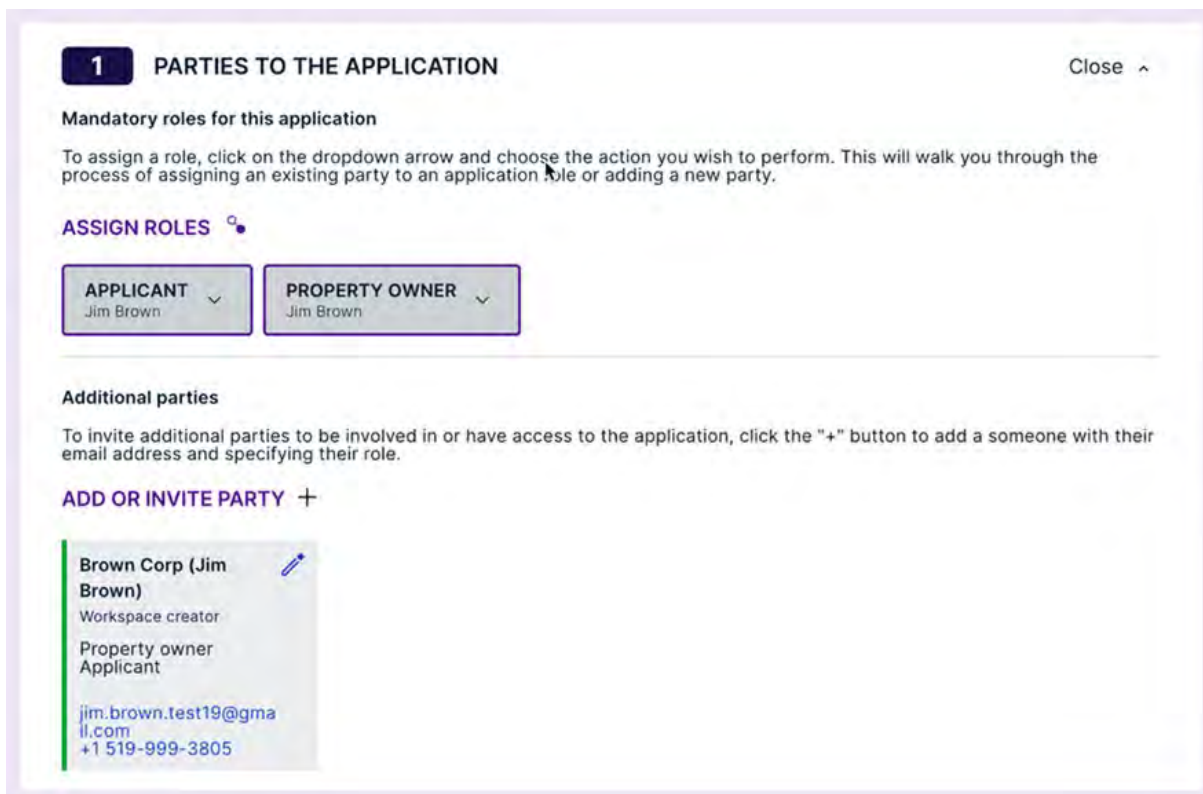
1 PARTIES TO THE APPLICATION

APPLICATION DATA

ATTACHMENTS

Adding parties


Applicants can add individuals and businesses to the Cloudpermit database as "parties" within the "Parties to the Application" section of the application workspace.





1 PARTIES TO THE APPLICATION Close ^

Mandatory roles for this application

To assign a role, click on the dropdown arrow and choose the action you wish to perform. This will walk you through the process of assigning an existing party to an application role or adding a new party.


ASSIGN ROLES 


APPLICANT  Jim Brown

PROPERTY OWNER  Jim Brown

Additional parties

To invite additional parties to be involved in or have access to the application, click the "+" button to add a someone with their email address and specifying their role.

ADD OR INVITE PARTY 

Brown Corp (Jim Brown) 

Workspace creator

Property owner

Applicant

jim.brown.test19@gmail.com

+1 519-999-3805

Party invitations are sent to individual recipients via email. Upon acceptance, the new party can access and participate in the registry application, subject to limitations set by the application owner. However, all parties in the application will automatically have permission to access and read the application details.

- When you add a person with an email address to your registry application, an invitation to collaborate will be automatically sent. The invitee may accept or decline the invite.
- If you enter the party details manually because the party doesn't have an email account, the party will become active immediately, regardless of whether the invite is ignored, accepted, or declined.
- If a business partner already appears in your account database, they will become active on the registry application once their data is added to the "Parties to the Application" feature.
- If you invite a new business to your registry application, you will create a new business account and choose at least one role for the company. All members of the business can access and read the application data.

Business data can be managed in the "Business Information" view, accessible from the user dashboard.

Application Data and Submission

The application data may require specific actions based on the registry category and trade(s) selected during the registry application creation. The municipal administrator determines this information during the Cloudpermit setup, ensuring the correct form for applicants is automatically added to the registry application.

After completing the required application information, applicants will digitally sign off on the registry applications before submitting them to the municipal department via Cloudpermit.

Contractor Registration Workflow Phases

The workflow for Contractor Registration ('Registry') is divided into two phases: **Application** and **Archival**.

- **Application Phase:** begins once the applicant has completed and submitted the registry application to the municipality.
- **Archival Phase:** begins after the registration has been approved.

Municipal administrators can use Cloudpermit to set up an automated archiving system for all approved applications. These applications, as well as all associated data, are stored in the Cloudpermit database and are available at any time.

Contractor Registration Application Issuance Process

The municipal authorities will begin reviewing applicants' registry applications once submitted. The application issuance process includes the below-described action steps.

Registration Application Review

The application review begins when a registry application is submitted to the municipal department.

Cloudpermit aids municipal departments in managing registry application submission reviews by offering a variety of review types that municipal administrators can customize within Cloudpermit. Examples include variations in application forms and attachment types.

Moreover, if the registry type necessitates it, municipal authorities can request additional reviews for the application by selecting the review type and assigning it to a suitable reviewer in the "Reviews" section of the registry application.

Upon completing registry application evaluations, the reviewer marks the forms and attachments as complete and records the results in Cloudpermit.

If there's a need for the applicant to alter the application forms or attachments, a change request will be submitted. Cloudpermit creates a task for applicants, which appears in their dashboard's "Task and Requests" section. Additionally, an email will be sent to applicants and business members informing them of the change request in the registry application workspace. The assigned reviewer verifies the changes provided in the workspace.

Registration issuance

Following a review of the registry application and the absence of any objections to registry issuance, the municipal authority prepares a registry bill that can be paid online or in person as instructed by a municipality.

FEES & PAYMENTS

Total due **\$75.00** Close

ADD LICENSE BILL +

ADD ADDITIONAL BILL +

UNPAID (1)

License bill

Copy of Fee Schedule 2

Item	Notes	Quantity	Unit	Unit price	Item total
License Fee		1.0		75	\$75.00
				BILL TOTAL	\$75.00
				TOTAL DUE	\$75.00

Invoice #

Payer: Financial Org (Applicant, Business Owner)

DOWNLOAD INVOICE

CANCEL BILL ↶

SET AS PAID ✓

Additionally, the municipal authority prepares a registry permit using the preconfigured registry template. Municipal administrators configure the following default date input configuration settings based on municipal registry issuance practices to the registry template:

- Issue Date
- Valid From
- Expiration Date

Contractor Registration

Draft

Registration number

800-CR-2023-011

Trades

Building Contractor, General Contractor, Plumbing Contractor

Issued by *

Jarkko Turtiainen

Date of issuance

9/27/2023

CLEAR

Valid from *

9/30/2023

CLEAR

Expiration date *

9/30/2024

CLEAR

Applicant

Leslie Wright

Issued to *

Leslie Wright (Applicant)

Registration description

Description

These data input settings can be defined at the main registry level so that each category level inherits them. They can also be determined separately for each category.

Once the registry has been created, the registry application workspace includes a "Registry" section that houses the draft and issued registry permits with PDFs for the registry application. The permit is automatically issued once the municipal authority acknowledges receipt of the registry fee in Cloudpermit.

Additionally, Cloudpermit sends automated emails to the workspace parties informing them that the registry permit has been issued.



REGISTRATION					Close
Registration number	Issued on	Issued by	Status	Registration certificate	
BOO-CR-2023-011	2023-09-27, 12:00 p.m.	Jarkko Turtiainen	Issued	DOWNLOAD CERTIFICATE	

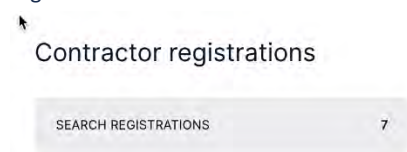
Contractor Registration Features

The Cloudpermit Registration ('Registry') product encapsulates a range of features designed to streamline the registry workflow, enhance user interactions, and ensure efficient management of contractor data. These features include:

- **Application, Registry View, and "My Businesses" View:** Manage registry applications, review registered entities, and oversee business details.
- **Renewal and Revoke Management:** Handle renewals and revocations efficiently.
- **Notifications & Alerts:** Receive real-time updates on application status, renewals, and other critical activities.
- **Document Management:** Organize, store, and retrieve essential contractor registration documents.
- **Data Import:** Import necessary data effortlessly, ensuring a smooth transition and data integrity.
- **Late Fees Management:** Administer late fees for overdue renewals or other instances as per municipal policies.
- **Report Management:** Generate and manage comprehensive reports on contractor registrations.

Contractor Registration View

The Contractor Registration ('Registry') view allows applicants and municipal authorities to find and keep track of issued registrations. The view is accessible via a widget from the user dashboard.



Municipalities may have hundreds of active registrations in their registry. Cloudpermit simplifies the process of searching for, filtering, and sorting registrations in the registry workspace by providing a "Search" feature with various search and filter criteria. These include the following:

Free text search.

Registry status filters (expired, issued, or revoked).

Filter for selecting municipal departments.

Filter for selecting different action items, like open bills or inspections in applications.

Filter for searching for expiring registrations.

Filter for selecting trades

Contractor registrations (6)
Modify selections to narrow down the results.

Search Saved filters

Q Type and search... Status Department Trades

Quick search EDIT

LAUNCH FILTERS FILTERS FILTERS FILTERS FILTERS

Results (6) Recently modified first

Lazy Cat Foundation General Contractor Updated 2 weeks ago Valid from: 2023-09-01 Valid until: 2023-09-15 Expired OPEN REGISTRATION	Jarkko Turtialinen Plumbing Contractor Updated 3 weeks ago Valid from: 2023-09-07 Valid until: 2023-09-08 Expired OPEN REGISTRATION	Etye Sarner General Contractor Updated 3 weeks ago Valid from: 2023-09-07 Valid until: 2023-09-07 Expired OPEN REGISTRATION	Jim Brown Air Conditioning Contractor Updated 4 weeks ago by City 1 Year Valid from: 2023-09-04 Valid until: 2024-09-04 Revoked OPEN REGISTRATION
Ilkka Mattila Multiple trades Updated a month ago Valid from: 2023-08-15 Valid until: 2024-08-31 Active OPEN REGISTRATION	Ilkka Mattila Multiple trades Updated 2 months ago Valid from: 2023-08-09 Valid until: 2024-08-21 Active OPEN REGISTRATION		

Go to top

The number displayed in the registry widget represents the number of valid registrations the user can access in the "Registry" view.

Selecting a sorting value from the drop-down list on the right under "Results" allows users to sort filtered registrations as cards. This feature applies only to the "List" view mode.

Registration View

The Registration view displays the issued registry applications for both applicants and municipal authorities in one centralized location.

Registration view for applicants

The Registration view enables users to view their issued registration data, like inspections, and request renewals for expiring permits. Applicants access the Registration view from their dashboard via the Licensing widget.

To proceed, they must select the registration and click the Open Registration button on the registration card, redirecting them to the Registration view.

The Registration view comprises the Inspections section and the registration application workspace entry. Applicants can request a registration renewal by clicking the Renew Registration button situated at the top right of the workspace.

BACK TO DASHBOARD / New registration MORE ACTIONS

Contractor Registration
New registration

DOWNLOAD CERTIFICATE

Assigned to Ilkka Mattila-Auth

Show messages

General Contractor Plumbing Contractor

Registration number
BOD-CR-2023-003

Submitted
2023-08-08, 7:29 a.m.

APPLICATION

CURRENT STEP: ISSUED 5 / 5

Parties Application Attachments Fees & Payments

1 PARTIES TO THE APPLICATION Open

APPLICATION DATA Open

Registration View for Municipal Authorities

Authority users are redirected to the selected registration application workspace through the Registration view. The Registration view facilitates municipal authorities in following up on registration applications or renewing or revoking a registration. These options are accessible in each application workspace's More Actions drop-down menu.

BACK TO DASHBOARD / New registration MORE ACTIONS

Contractor Registration
New registration

DOWNLOAD CERTIFICATE

Assigned to Ilkka Mattila-Auth

Show messages

General Contractor Plumbing Contractor

Registration number
BOD-CR-2023-003

Submitted
2023-08-08, 7:29 a.m.

APPLICATION

CURRENT STEP: ISSUED 5 / 5

Parties Application Attachments Fees & Payments

1 PARTIES TO THE APPLICATION Open

APPLICATION DATA Open

More Actions:

- Create follow-up workspace
- Renew license
- Revoke license

Registrations hold validity for a defined period. Upon expiry or near expiry, the holder may request a renewal through the issued registration application. Municipalities can smoothly renew expired registrations by viewing current and historical registration data in one place in the application.

Occasionally, municipal authorities may need to cancel a valid registration for specific reasons. The Revoke feature is available in all issued applications in the Registration view.

Business Information View

The "Business Information" view is generated when a user adds an existing business as a party or invites a new business to the application workspace. Within this view, users can access business contact details, view associated applications, registrations, and manage business users through a user management section.

Once a business party is established in the "Parties to the Application" section, the business data within the "Business Information" view becomes readily available for use across registration applications in Cloudpermit.

For convenient access, the "My Businesses" section is prominently displayed at the top of the applicant's dashboard after the creation of business parties. This section lists all current business parties linked to the applicant's account, with each business account directly linked to its respective "Business Information" view, accessible by clicking the business name link.

The "Business Information" view includes contact information, a list of business contractor registration the business has, and expiring and revoked registrations. Furthermore, administrators of the business account have full access to all information in the "Business Information" view. They can add new members (view-only access) and other administrators (full access to the business data) in the "Users in Business" section. Administrators can also remove other administrators and members from the business account. However, a business account must have at least one administrator.

B_Visible

Boone, Illinois

CONTACT INFORMATION

Business name B_Visible	Business type Partnership	FEIN 999-999-9999
Trade name / DBA B_V	Mailing address	City Boone
State Illinois	ZIP code 12345	Business phone +1 1234567890
Created by		2023-03-29, 11:20 p.m.

BUSINESS LICENSES

Card view

List view

Close ^

Licenses

BUSINESS LICENSE

Expires on 12/31/2025

BUSINESS LICENSE

Expires on 12/31/2023

BUSINESS LICENSE

Expires on 12/31/2025

Show expired/revoked licenses v

USERS IN BUSINESS

Close ^

Status	Name	Email	Groups
Active			Administrators

Renewal and Revoke Management

Renewal and Revoke Management are integral to the contractor registration application workspaces.

The contractor registration renewal process applies to applicants and authorities who can apply for a registration renewal on behalf of their customers. The Cloudpermit system sends an email notification to all parties and business representatives in the most recent application workspace well before the registration expires, followed by another on the day the registration expires. The renewal process includes the following:

- **Renewal of expired contractor registrations**
- **Renewal and late penalty fees**

The contractor registration holder can create a renewal application for the expired registration in the contractor registration application workspace. The registration renewal fee is determined by the type of business and the municipality's fee schedule. Municipal authorities will manage contractor registration renewals in contractor registration applications by selecting the "Renew registration" option from the "More Actions" drop-down menu.

Municipal authorities may revoke valid registrations for specific reasons. The reason for the revocation must always be specified. The contractors and the parties in the most recent registration application workspace are notified by email that their registration has been revoked.

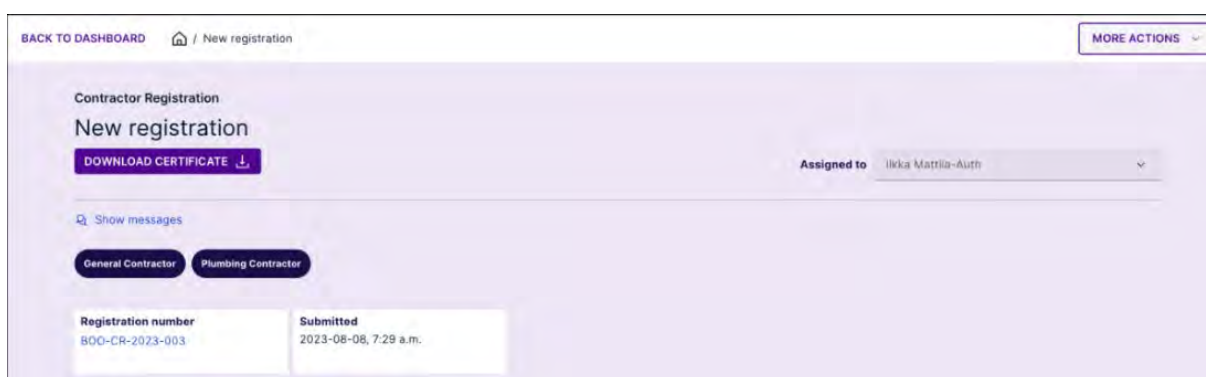
Notifications and Alerts

Contractor registration renewal notification is triggered based on the municipality's configuration setting. The expiration notification will display on the user interface. Additionally, the system will send two email notifications: one a few days before the registration expiry and another on the expiration day. Municipal administrators can customize email notifications' frequency, notification type, and content.

Cloudpermit automatically sends contractor registration expiration notifications to all parties involved in the most recent application workspace. Renewal notifications submitted will also appear in the audit log for the "Registration" view.

Document Management

Cloudpermit generates all documents in downloadable and archivable PDF format by default. Contractor registration documents, such as uploaded attachments, permits, inspection visit results, contractor registration fee invoices, and receipts, are automatically saved to the respective workspace sections as PDF templates.



The latest registration also appears in the application's workspace header, which is accessible at any time.

Data Import

Authority users can import previously issued business registrations and attachments into the Cloudpermit database.

This process involves uploading Excel sheet columns containing registration data, including registration number, registration holder, address, property ID, and municipality. Users can then map the Excel file to define a form that will appear in the workspace. A preview of the draft registration and workspace is available for users to review before importing data. Similarly, attachments for existing registrations can be imported seamlessly.

Upon importing a registration, Cloudpermit creates and links it to a permit (if required). The application workspace is constructed using form data from the registry import and attachments from their respective Excel sheets.

Late Fee Management

In the context of the contractor registration, businesses may sometimes incur penalties, specifically late fees, for delayed payments. Cloudpermit streamlines this process with automated late fee calculations, capable of managing potentially high volumes of late fee scenarios. The calculation of late fees is contingent on the type of business and the fee schedule established by the municipality. Cloudpermit accommodates the following types of late fees:

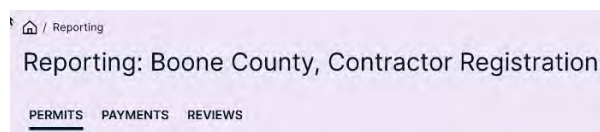
- **One-time fees**
- **Recurring monthly fees**

Administrators have the flexibility to define these fees as flat or calculated, as well as set a maximum number of months for recurring monthly fees (ranging from 2 to 12). If a registration renewal is overdue, administrators can designate the late fee as "one-time" and add it as a new fee item to the registration bill. In cases of "recurring monthly" late fees, administrators can include a new fee item in the bill and calculate the number of months for which it has been overdue.

Late fees can be automatically calculated when a bill is generated, taking into account the registration's expiration date and considering bank holidays and weekends. Cloudpermit also allows municipalities to align registration fees with their established fee schedule.

Report Management

The contractor registration module enables municipal authorities to create basic reports for registered organizations in Cloudpermit.



Generating reports can assist a municipality in ensuring compliance, regenerating revenue, planning, allocating resources, and enhancing transparency and accountability.

Municipal authorities have the capability to generate reports related to registrations, payments, inspections, and reviews. Users can select one report at a time and customize its time range, registration type (submitted/issued), and registration categories. Cloudpermit supports CSV and Excel spreadsheet report formats.

Registration Reports

Contractor registration reports encompass both submitted applications and issued registrations.

- **Submitted Applications Report:** This report provides a list of registration applications submitted within the selected time range, along with any other applied filters, such as registration category.
- **Issued Registrations Report:** Here, you'll find a list of all applications with a given date within the time range and matching any other filters, such as registration category.

Payment Reports

Payment reports include "Online Payments" (the default option) and "Fees and Payments."

Review Reports

Report-type options for review reporting include reviews and review events.

Reviews Report: This report compiles a list of applications with a "Review start date" falling within the specified time range and aligning with any other applied filters, such as category or review name.

Review Events Report: Here, you'll find a list of applications with an "Event date" within the designated time range and matching any other filters, such as category or review name.

Configuration Description

Below are the tables illustrating the configuration of Cloudpermit Contractor registration features.

Configuration		
Section	Component	Description
Registration categories	Registration categories	It allows changing the registration category description.
Registration categories	Disable location services for new workspaces	It allows not displaying location services for new workspaces.
Registration categories	Renewal limit	It defines how many days before the expiration of a registration can be renewed (earliest renewal point). If left empty, there will be no limit for the renewal.
Registration categories	Registration notifications for the first and second renewal	Users can set how many registration notifications will be for the first and second renewals.
Registration categories	Registration defaults	Users can set registration defaults for the date issued, date of issuance, valid from, and expiration dates.
Attachment types	Add a new attachment type	It includes available attachment types for registrations.
Party roles	Add a new party role	It includes new party roles not used in previous registration applications.
Required forms, attachments, and configs	Forms	These settings define which forms are included and which attachments and review configs are required in different registration applications.
Registration numbering	Registration number	A registration number is assigned to a registration when it is issued. These settings allow administrators to customize how the registration number is generated. Custom registration numbers will always include the current year and a sequential number.
Registration numbering	Reset the counter to the change of the year.	Users can reset the counter on the year change by enabling the option.
Registration numbering	Assign a new number on renewal	Users can assign a number on renewal by enabling the option

Data Import		
Section	Component	Description

Data Import	Import a spreadsheet	It enables importing registrations, inspections, and attachments.
-------------	----------------------	-------------------------------------------------------------------

Fees		
Section	Component	Description
Fee schedule	Configuration	It includes a list of available fees specific to each customer.
Other settings	Online payment	It enables Cloudpermit to be configured to accept online payments from various service providers.

Payment System		
Section	Component	Description
Payment System settings	Configure payment page settings	It enables configuring payment page settings.

Reporting		
Section	Component	Description
Reporting	Report types	It includes the following reporting types and their settings: registrations, payments, inspections, and reviews.

Review configs		
Section	Component	Description
Manage available reviews	Time tracking	It enables time tracking for reviews and selecting available reviews for the organization.
Manage available reviews	Available reviews	It enables adding new reviews to applications.

Templates		
Section	Component	Description
Permit templates	Templates	It includes various registration templates with customizable layouts.

User management		
Section	Component	Description
User management	Add a new user	It enables adding a new user, editing user permissions and groups, and removing a user.

Registration Personas in Business Accounts

A business is established when a user adds it as a party to an application. This action designates the user as an administrator within the business account. It's essential to note that a business account must always be maintained by at least one administrator. The administrator holds the authority to extend invitations to new administrators and members or remove them from the business account.

In Cloudpermit Contractor registration, there are two distinct personas: administrators and members. Each persona is assigned specific responsibilities or privileges tailored to workflows within the Contractor registration.

Persona	Tasks /Workflow
Administrator Cloudpermit administrators have complete editing access to the business.	<ul style="list-style-type: none"> ○ An Administrator can access the business accounts to which the person has been nominated as an Administrator. ○ An Administrator can add administrators and members to business accounts to which the person has been nominated as an Administrator. ○ An Administrator can edit contact information from the "Business Information" view. ○ An Administrator can add new administrators and members and remove them from the business account.
Member	<ul style="list-style-type: none"> ○ A member has read-only privilege in business accounts. ○ A member can access the application workspace but not change it.

Overview of User Permissions in Business Accounts:

- Initially, the municipality that created the business account maintains editing permissions for business information, including user invitations, until the first admin invitation for the account is accepted.
- Subsequently, the business account functions like any other, with only the designated business administrator having edit access.
- The first individual to receive an invitation becomes the administrator. It's only after an administrator party is included that the municipality's control can be revoked.
- Administrators cannot self-remove from a business if they are the last administrators, preventing the business entity from being orphaned.

Cloudpermit Third-Party Integrated Systems

Cloudpermit offers a set of standard configurable integrations with over twenty (20) systems, grouped into distinct integration types as detailed below.

In situations where the specific integration requirement cannot be met through the standard configurable options, Cloudpermit may explore alternatives such as integrating a new system, making minor adjustments to existing integrations, or developing a custom solution. These specialized integrations are subject to separate pricing and, if relevant, will be discussed within your contract.

Standard Configurable Third-Party Integrations

Cloudpermit offers integrations with third-party systems that can be tailored to suit the client's needs as a standard part of the implementation process. It's important to note that these integrations may come with associated monthly or annual fees, which will be explicitly outlined in the contract.

Geographic Information System (GIS)

Cloudpermit provides support for a one-way integration with the municipal authority's Geographic Information System (GIS). The supported GIS integrations encompass the following platforms:

- **ESRI ArcGIS**
- **CGIS**
- **CartoVista**
- **MuniSight**

Online Payment

Cloudpermit integrates with various online payment providers through checkout systems or gateways, enabling users to pay bills online when configured by a municipality. Payer info and bill details are securely sent to the payment provider, with payment success information returned. Supported integrations include:

- **ACI**
- **Allpaid**
- **Bambora**
- **CCP/NIC Online Payment**
- **ePay**
- **E-xact**
- **Elavon**
- **Government Window**
- **Merchante**
- **Moneris**
- **MSB (Municipal Services Bureau)**
- **OpenEdge**
- **Payeezy**
- **Paymentus**
- **PayNowlink**
- **Point & Pay**

- **Square**
- **Stripe**

Authentication through Open ID Connect (OIDC)

When a user's account is linked to an external system for authentication, Cloudpermit sends the authentication via an Open ID Connectivity (OIDC) API to a third-party login page. The entire authentication process occurs in the third-party system, which then signals successful authentication back to Cloudpermit. Please note that this integration does not cover authorization; all groups and permissions are still managed within Cloudpermit. Supported OIDC authentication integrations include:

- **Azure AD**

Additional AD integrations are priced separately and, if applicable, addressed within your contract.

Multi-Factor Authentication (MFA)

When Multi-Factor Authentication (MFA) is required for a department, Cloudpermit login mandates at least Two-Factor authentication. Following a successful Cloudpermit authentication, users are directed to a third-party system for the second-factor authentication, which can be a mobile app or Security Management System (SMS). This third-party system must provide an OIDC (Open ID Connect) interface and subsequently relay the success of the second-factor authentication back to Cloudpermit. Supported MFA integration options include:

- **Duo**

Additions and Minor Changes to Third-Party Integrations

Cloudpermit can incorporate integrations with new systems, provided they align with an existing integration type (e.g., Online Payment or GIS) and the third-party system offers Application Program Interfaces (APIs) compatible with our current integration model.

Any integrations with new systems or minor alterations to existing system integrations will be subject to separate agreements and are not part of the standard implementation package. These integrations may involve a development fee as well as annual or monthly charges.

Cloudpermit will provide an estimated release timeline for the integration upon reaching an agreement.

Custom Integrations

Integrations falling outside the scope of Configurable Standard integrations, minor modifications to existing integrations, or new systems within an existing integration type are categorized as Custom Integrations.

All custom integrations necessitate a feasibility study and the creation of specifications before an agreement can be reached. Cloudpermit will provide an estimated release timeline for the integration upon agreement.

The implementation of a Custom Integration involves a development fee as well as annual or monthly charges.

Integrations with Backend Systems

In backend system integrations, Cloudpermit employs a streamlined process for transmitting information to a backend system. This process involves the following key steps:

- **Record Creation:** Cloudpermit establishes a dedicated record within the backend system for each workspace.

- **Property and Contact Linking:** Cloudpermit links properties and contacts to their respective records, creating new contacts if needed.
- **Status and Data Updates:** Cloudpermit ensures that record status and specified data fields are updated as required.

Additionally, the integration can be configured to encompass the transfer of fees to the backend system. It can also include the transfer of completed reviews and inspections. Implementing this integration may necessitate adjustments in the backend system and mapping statuses and codes between the two systems.

Please note that integrated backend solutions are subject to separate pricing, which will be detailed in your contract.

Integrations with Electronic Archives

This integration method involves transmitting the contents of a workspace to an external system for archival purposes. These external systems typically fall under the categories of Enterprise Content Management (ECM) or Electronic Archives. The integration process is as follows:


- **Archival Folder Creation:** Cloudpermit establishes an archival folder within the third-party ECM or Electronic Archives system.
- **Data Field Values:** Cloudpermit writes the values of the configured data fields into the archival folder.
- **Attachment Transfer:** Configured attachments are transferred into the folder for archival purposes.

Please be aware that integrated electronic archive solutions are subject to separate pricing, which will be outlined in your contract.

Conclusion: Empowering Efficient Contractor Registration with Cloudpermit

In this comprehensive user guide for Cloudpermit's Contractor Registration product, we've explored the various functionalities and features that empower municipalities and contractors in managing and verifying contractor credentials seamlessly.

From the initial application creation to renewal management and integration possibilities, Cloudpermit streamlines the entire process. Users can effortlessly add parties, access essential business information, and generate reports for compliance and planning. With the flexibility of custom and standard integrations, Cloudpermit offers a versatile solution to meet diverse needs. Whether it's online payment processing, GIS integration, or electronic archival, Cloudpermit provides the tools for efficient contractor registration management.

A woman wearing a white hard hat and a high-visibility safety vest over a plaid shirt is shown in profile, looking at a tablet device. The background is dark with some blurred lights, suggesting an outdoor construction or industrial setting at night. The overall image has a blue tint.

Cloudpermit Code Enforcement Product Description 2023

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Description

Cloudpermit is an online community development software that provides local governments with Software-as-a-Service (SaaS) products available 24/7.

The Cloudpermit product portfolio includes the Building Permitting, Planning, Land Use Permitting, and Code Enforcement products.

This product description applies to the Code Enforcement product.

The information in this document is subject to change without notice aligning with future releases. Releases supply information about new features and non-security updates.

Cloudpermit Core Benefits

Cloudpermit supplies one complete end-to-end product for local governments to manage the entire building, licensing, and planning e-permitting and code enforcement case process. It allows all parties integral to the process, from applicants to authorities to key stakeholders. This ensures that all parties receive real-time information about applications, licenses, and cases.

Below are described the primary benefits Cloudpermit provides to its customer base:

- ⇒ Cloudpermit standardizes local government's building, licensing, planning, and code enforcement processes by supplying the best digital practices.
- ⇒ The 24/7 online service on any browser or operating system allows remote and mobile work on-site.
- ⇒ Monthly releases enable automatic updates to the product providing the latest updates and enhancements while not requiring users to download or install any software files.
- ⇒ A cloud-based SaaS product provides a quick and easy implementation with a municipality-based configuration, lessening the burden on municipal resources.
- ⇒ Through interactive maps, local governments can use high-quality location data and up-to-date property information. This up-to-date property information is derived directly from the local government's Geographic Information System (GIS).
- ⇒ Workspaces enable instant collaboration and communication within applications and code enforcement cases, simultaneously speeding up processes and improving the workflow for all involved parties.

Cloudpermit Code Enforcement

The Cloudpermit Code Enforcement product supplies functionality to enforce violations of statutes or ordinances regulating public health, safety, public works, and building standards within the municipality.

Accessible through any browser or mobile device, municipal code enforcement authorities manage citizens' complaints, inspections, and code enforcement cases to ensure the violations are duly resolved.

Cloudpermit Code Enforcement Features

The Cloudpermit Code Enforcement software provides **Complaint and Case Management** and **Public View** functions to provide an excellent user experience in the municipality's code enforcement workflow.

Cloudpermit Code Enforcement Features:

Complaint and Case Management

Public View

Complaint and Case Management

The **Complaint and Case Management** functionality, i.e., the "complaints and new cases" workspace, provides comprehensive functionalities for processing code enforcement complaints and creating new cases.

By clicking the "Open Complaints" or "Create New Case" links on the user dashboard, the user will access the "complaints and new cases" workspace.

Access to the "complaints and new cases" workspace.



Using the workspace for complaints and new cases, code enforcement officers can manage all complaints. These complaints may have come from the public via "Public View" or from code enforcement authorities who received them via phone, email, social media, or municipal website and recorded them in Cloudpermit via complaints and new case workspace.

The Complaint and Case Management in Cloudpermit enables the following:

- ⇒ Cloudpermit's interactive maps enable one to search for code violation properties by address, PIN, PID, or spot properties on the map.
- ⇒ Users can filter complaints by selecting the category and status criteria from the drop-down menus. Cloudpermit displays the top-matching cases as case cards in the "Results" section and as pins on the map.
- ⇒ Users can select to display all past complaints (reviewed, closed, abandoned) in the map or list view.
- ⇒ Code enforcement officers triage the complaints. The invalid complaints will be abandoned. However, they remain in the system and can be reopened anytime.
- ⇒ Creating new cases will take all valid complaints to the code enforcement process.
- ⇒ Cloudpermit automatically creates pre-scheduled inspections the code enforcement officers can manage by modifying the suggested date and time and assigning them directly to an available inspector.

Creating a case for the valid complaint in the "complaints and new cases" workspace.

The 'Create a case' form includes the following elements:

- Priority:** Radio buttons for HIGH, NORMAL (selected), and LOW.
- Category:** A dropdown menu showing 'Building without permit'.
- Case description:** A text area with a rich text editor toolbar (Normal, Bold, Italic, Underline, Text color) containing the text 'The building has no valid permit.'
- Checkboxes:** Two checkboxes labeled 'In proximity of property' and 'Non-owner violation', both of which are unchecked.
- Description of the location:** A text area with a rich text editor toolbar (Normal, Bold, Italic, Underline, Text color) containing the text 'The second residence on the boulevard.'
- Buttons:** 'CANCEL' and 'CREATE' buttons at the bottom.

Each municipality's category types for complaints and cases are configurable to match their local ordinances and codes.

Additionally, code enforcement officers can open a new case in the workspace for complaints and new cases without first filing a complaint if they discover a violation without receiving a formal complaint.

Creating a complaint for the specific property location in Cloudpermit.

The 'New complaint' form includes the following elements:

- Filter:** 'CLEAR' and 'SAVE FILTER' buttons.
- Category:** A dropdown menu.
- Status:** A dropdown menu with a red 'X' icon.
- Quick filters:** Buttons for 'TRASH ABANDONED 2', 'GARBAGE REVIEW 13', and 'TRASH ALL 10'.
- Map:** A map showing a property location with a red pin.
- New complaint:** A section titled 'Select property for the complaint' with a dropdown menu.
- Select category:** A section with buttons for 'BUILDING WITHOUT PERMIT', 'CONDEMNED PROPERTY', 'GARBAGE' (selected), 'LONG GRASS', 'TEST', 'TRASH', and 'VEHICLES'.
- Description:** A text area with a red asterisk containing the text 'Lots of garbage on the property.'
- Description of the location:** A text area.
- Buttons:** 'CANCEL' and 'SUBMIT' buttons at the bottom.

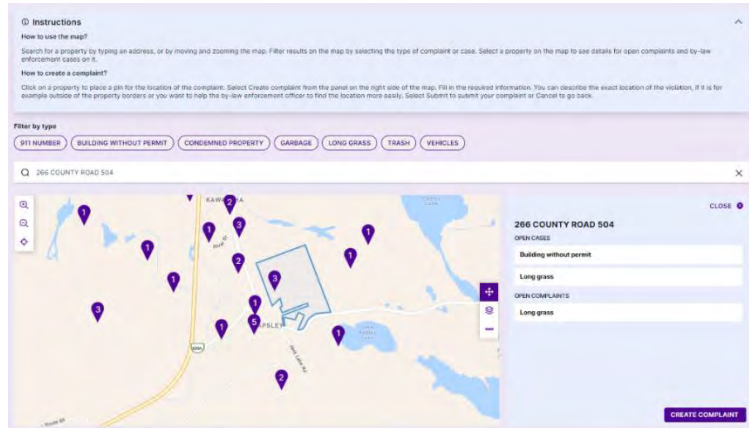
Public View

A municipal code enforcement department can publish a "Public View" in Cloudpermit to display the existing complaints and code enforcement cases on a map. The "Public View" also enables citizens to submit new complaints.

The "Public View" functionality is configurable. Municipal administrative users can select which contact information, for example, name, phone, address, and email, is required by the complainant and provide options for different categories for the complaints.

Municipal administrators can also restrict the ability to show any existing complaints or code enforcement cases on the map.

The "Public View" is displayed at the top of the "complaints and new cases" workspace.



Configuration Tools

Administrative users can adjust the service to the municipality's requirements using Cloudpermit's configuration tools.

Cloudpermit Code Enforcement configuration enables the following:

- ⇒ Adding and managing by-law enforcement categories and visibility of complaints
- ⇒ Managing the content for field inspections
- ⇒ Managing attachment types, party roles, and archiving configuration
- ⇒ Managing case numbering
- ⇒ Managing fees configuration
- ⇒ Working forms and templates configuration
- ⇒ Managing reporting configuration
- ⇒ Managing user groups and role-based permissions.

Additionally, municipalities can manage their system language selection.

Configuration Description

The tables below describe the Cloudpermit Code Enforcement configuration.

Configuration:

Section	Component	Description
Code Enforcement categories	Category description, Archive setting, Complaints	It allows changing the category description, archiving a case workspace, and managing the visibility of complaints in the Public View and other departments.

Fees Management:

Section	Component	Description
Fee schedule	Configuration	It includes a list of available fees specific to each client.
Other settings	Online payment integration	It allows configuring Cloudpermit to accept payment from online providers.

Inspections:

Section	Component	Description
Inspections	Time slots	It includes available time slots for inspection scheduling.
Inspection types	Inspection subtypes	It allows managing inspection types and their descriptions.

Templates:

Section	Component	Description
Templates	PDF templates for inspections	It includes configurable inspection report templates.
Templates	PDF templates for letters	It includes configurable templates for several kinds of letters.
Location for the application	Extra map layers	Additional map layers can be enabled for the client.

Cloudpermit Third-Party Integrated Systems

Cloudpermit has standard configurable integrations to over twenty (20) systems categorized under six different integration types described below.

Suppose the need for integration with a standard configurable integration cannot be fulfilled. In that case, Cloudpermit may provide integration to a new system, make a minor change to an existing one, or develop a custom one. These integrations are priced separately and, if applicable, addressed within your contract.

Standard Configurable Third-Party Integrations

Cloudpermit has integrations to third-party systems that can be configured for the client as part of the standard implementation. These integrations may include monthly or annual fees, which will be stated in a contract.

Geographic Information System (GIS)

Cloudpermit supports a one-way integration with the municipal authority's GIS to search properties by civic address or property identifier, retrieve property information, read map layers to be shown on maps, and retrieve owner information.

Supported GIS integrations include the following:

- **ESRI ArcGIS**
- **CGIS**
- **CartoVista**
- **MuniSight**

Online Payment

Cloudpermit integrates with most online payment providers through various online checkout systems or payment gateways to process fees and dues. Users can choose an online payment option for their bills when an online payment integration is configured for a municipality.

Payer information and bill contents are sent to the PCI-compliant payment provider and forwarded to the provider's checkout page.

The payment provider returns information about the success of the payment. Where necessary (and possible), the convenience fees are configured in the payment system.

Supported Online Payment integrations include the following:

- **Allpaid**
- **Bambora**
- **CCP/NIC Online Payment**
- **ePay**
- **E-xact**
- **Government Window**
- **Merchante**
- **Moneris**
- **OpenEdge**
- **Paymentus**
- **PayNowlink**
- **Square**
- **Stripe**
- **Payeezy**

Authentication through Open ID Connect (OIDC)

When a user account is linked to an external system for authentication, Cloudpermit sends the authentication through an Open ID Connectivity (OIDC) API (Application Program Interface) to a third-party login page for the organization.

With this integration, the whole authentication happens in the third-party system, which returns a success of authentication to Cloudpermit. The integration does not include authorization; all groups and permissions are managed in Cloudpermit.

Supported OIDC authentication integrations include the following:

- **Azure AD**

Additional AD integrations are priced separately and, if applicable, addressed within your contract.

Multi-Factor Authentication (MFA)

When a Multi-Factor Authentication (MFA) is needed for a department, Cloudpermit login will require at least Two-Factor authentication.

After successful Cloudpermit authentication, the users will be sent to a third-party system for second-factor authentication, such as a mobile app or Security Management System (SMS).

The third-party system must supply an OIDC (Open ID Connect) interface, and it returns the success of the second-factor authentication to Cloudpermit.

Supported MFA integration includes the following:

- Duo

Additions and Minor Changes to Third-Party Integrations

Cloudpermit adds integrations with new systems if the integration is for an existing integration type, e.g., Online Payment or GIS. Cloudpermit has confirmed that the third-party system has Application Program Interfaces (APIs) that support the current integration model.

All integrations to new systems and minor changes to existing system integrations must be agreed upon separately, and they are not included in the standard implementation.

Delivery may contain a development fee and an annual or monthly fee. Cloudpermit will give an estimated future release for integration upon agreement.

Custom Integrations

All other integrations that are not Configurable Standard integrations, minor changes to existing integrations, or new systems with an existing integration type are considered Custom Integrations.

All custom integrations require a feasibility study and specifications before the agreement. Cloudpermit will give an estimated future release for integration upon agreement. Delivery of a Custom Integration contains a development fee and an annual or monthly fee.

Integrations with Backend Systems

In backend system integrations, Cloudpermit leverages an integration process that enables sending the information to a backend system.

- ⇒ Cloudpermit creates a folder in the backend system for each workspace.
- ⇒ Cloudpermit will link the properties and contacts into the folder and make new contacts if necessary.
- ⇒ Cloudpermit updates the folder status and specified data fields in the folder.

Integration can be configured to include the transfer of fees to the backend system. Completed reviews and inspections can be configured to be transferred too. The integration setup will require changes in the backend system and mapping statuses and codes between the systems.

Integrated backend solutions are priced separately and, if applicable, addressed within your contract.

Integrations with Electronic Archives

This type of integration sends the content of a workspace to an external system for archival. The third-party systems are Enterprise Content Management (ECM) or Electronic Archives. Cloudpermit will create an archival folder in the third party, write the values of the configured data fields in the folder, and transfer configured attachments into the folder for archival.

Integrated electronic archive solutions are priced separately and, if applicable, addressed within your contract.

A woman wearing a white hard hat and a high-visibility safety vest over a plaid shirt is shown in profile, looking at a tablet device. The background is dark with some blurred lights, suggesting an outdoor night setting. The overall image has a blue tint.

Cloudpermit Licensing Product Description 2023

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General Description

Cloudpermit is online community development software that provides local governments with Software-as-a-Service (SaaS) products available 24/7.

The Cloudpermit product portfolio includes Building Permitting, Planning, Land Use Permitting, Code Enforcement, and Licensing products.

This product description applies to the Licensing product.

The information in this document is subject to change without notice aligning with future releases. Releases supply information about new features and non-security updates.

Cloudpermit Core Benefits

Cloudpermit supplies one complete end-to-end product for local governments to manage the entire building, licensing, and planning e-permitting and code enforcement case process. It allows all parties to be integral to the process, from applicants to authorities to critical stakeholders. It ensures that all parties receive real-time information about applications, licenses, and cases.

Below are described the primary benefits Cloudpermit provides to its customer base:

- ⇒ Cloudpermit standardizes local government's building, planning, code enforcement, and licensing processes by supplying the best digital practices.
- ⇒ The 24/7 online service on any browser or operating system allows remote and mobile work on-site.
- ⇒ Monthly releases enable automatic updates to the product providing the latest updates and enhancements while not requiring users to download or install any software files.
- ⇒ A cloud-based SaaS product provides a quick and easy implementation with a municipality-based configuration, lessening the burden on municipal resources.
- ⇒ Through interactive maps, local governments can use high-quality location data and up-to-date property information. This up-to-date property information is derived directly from the local government's Geographic Information System (GIS).
- ⇒ Workspaces enable instant collaboration and communication within applications and code enforcement cases, simultaneously speeding up processes and improving the workflow for all involved parties.

Cloudpermit Licensing

The Cloudpermit Licensing product is a software solution for local governments to automate and streamline their business licensing processes.

It enables our customers to automate their licensing process to provide their end users - both customers and administration - with a streamlined licensing and reporting system that eliminates the need for time-consuming manual processes.

The Cloudpermit Licensing product enables the following features:

- ⇒ It provides end-to-end, online software for local governments to help them to manage business licenses efficiently and effectively, leading to better service for citizens and businesses.

- ⇒ The product includes license application and issuance features, fee management, compliance monitoring, and reporting tools, which help local governments have better insights and control over their licensing data, making reporting, data analysis, and forecasting easier.
- ⇒ It offers unique features for local governments to efficiently manage their business licensing process, from initial application to renewal and compliance monitoring.
- ⇒ It offers a centralized platform for license management, reducing the time and effort required to obtain and maintain them.

The Cloudpermit software is automatically updated periodically with the latest updates and enhancements, not requiring users to download or install any software files.

This product description provides more detail about the Cloudpermit Licensing product's licensing creation wizard, key features, and integrations.

License Application Creation Wizard

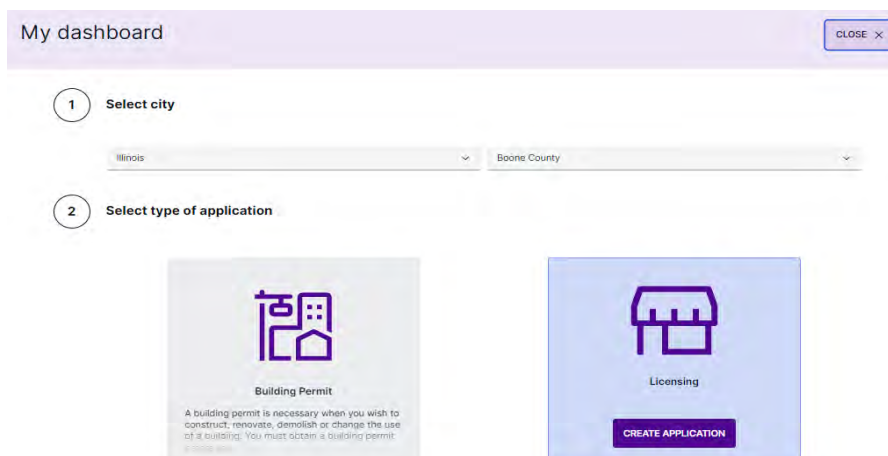
The Cloudpermit Licensing product provides a simple user interface for creating, applying for, reviewing, managing, and issuing business licenses.

Beginning the application creation

Because license applications in Cloudpermit are not associated with projects, and some license applications do not have a specific address or property, the application creation wizard accessible from the user dashboard assists applicants in creating the appropriate workspace for the license application.



Applicants will choose to which state and municipality to submit their application. As a result, applicants can only submit application types permitted in the selected municipality.



Applicants will select the license category and work type that best describes the purpose of their applications in the "Create a New Application" workspace. These choices will determine the application's requirements and process in Cloudpermit.

The screenshot shows the 'Create a New Application' workspace with the 'Category' step selected. The header has three tabs: 'Category' (active), 'Location', and 'Summary'. Below the header, the text reads: 'Select category, type and target for your application'. A 'Good to know' section provides instructions. The main area has two columns: 'Category' and 'Work type'. Under 'Category', 'Business License' is selected. Under 'Work type', 'New' is selected. Below these, a dropdown menu 'Select who you are applying for' is open, showing options like 'Select person or business', 'Myself (Am Temp)', 'April Business Company (Business)', 'Finetel Org (Business)', 'Moonlight Gaming (Business)', and 'Snowflake Company dba Snowflake Corporation (Business)'. At the bottom right are 'CANCEL', 'BACK', and 'NEXT' buttons.

In Cloudpermit, the license applicant can be a private individual or a business. Furthermore, authorities can also apply for licenses on behalf of their customers. Municipalities can also make an online copy for those applications sent by paper or email.

Defining the location

Business location information is frequently requested when applying for business licenses and contractor registrations. Cloudpermit applicants can benefit from the municipality's Geographic Information System (GIS) to find exact business addresses for their license applications.

If the location mapping fails, applicants can manually enter the property address, which the municipal authorities will correct while the license application is being reviewed.

The screenshot shows the 'Create a new application' workspace with the 'Location' step selected. The header has three tabs: 'Category', 'Location' (active), and 'Summary'. Below the header, the text reads: 'Location for the application'. A 'Good to know' section provides instructions. The main area shows a map of Boone County, Illinois. A search bar at the top right contains '162 HASTINGS'. Below the map, the 'Address' is listed as '162 HASTINGS'. To the right, 'Property details' are shown: 'PIN: 600' and 'Municipal ID: 12832'. At the bottom right are 'CANCEL', 'BACK', and 'NEXT' buttons.

Draft license application workspace

Once the license application data is in place, applicants will be redirected to the draft license application workspace. The "Required Tasks" progress bar displays the actions the applicant must take to complete and submit the license application. These actions are related to the selected license category type.

The screenshot shows the 'Draft license application workspace' for '162 HASTINGS, Boone County'. At the top, there are links for 'BACK TO DASHBOARD' and '162 HASTINGS', along with 'MORE ACTIONS' and 'SIGN OFF APPLICATION' buttons. The main header includes 'Licensing' and '162 HASTINGS, Boone County' with a 'SHOW MAP' button. Below this, there are options for 'Show messages' and 'Email notifications' (set to YES). A 'PIN' field shows '600'. The 'APPLICATION' section indicates the 'CURRENT STEP: DRAFT 1/7' and 'NEXT STEP: PAYMENT'. The 'REQUIRED TASKS' section shows a progress bar with four steps: 'Parties' (red circle), 'Application' (red circle), 'Attachments' (green checkmark), and 'Fees & Payments' (red circle). To the right of the progress bar, there are three instructions: 'Add required application parties: Business Owner', 'Make sure you have filled in all required form fields.', and 'Application needs to be signed off before submission.' Below the progress bar, there is a note: 'You need to complete required tasks to continue to the next phase.' The 'PARTIES TO THE APPLICATION' section has an 'ADD OR INVITE PARTY' button and an 'Open' dropdown. The 'APPLICATION DATA' section has an 'Open' dropdown. The 'ATTACHMENTS' section has an 'Open' dropdown.

Adding parties to the license application

Applicants can add individuals and businesses to the Cloudpermit database as "parties." It happens in the "Parties to the Application" section of the application workspace.

The screenshot shows the 'PARTIES TO THE APPLICATION' section. At the top, there is an 'ADD OR INVITE PARTY' button and a 'Close' button. Below this, there are three cards representing different parties: 'Maya User' (Workspace creator, Applicant, Business Owner, email: mayouser627@gmail.com, phone: +1 (234)234-3456), 'Financial Org' (Invite accepted, Agent, View business details), and '(Pending)' (Invite pending, Architectural consultant, email: sofiaarchitect63@gmail.com). Each card has a blue pencil icon for editing and a blue circular icon with a plus sign for adding more parties.

The party invitations will be sent to individual recipients via email. Following acceptance of the invitation, the new party can access and participate in the license application within the limitations set by the application owner. However, all parties in the application will automatically have permission to access and read the application details.

- ⇒ If you add a person with the email address to your license application, the invitation to collaborate on the application will be automatically sent. The invitee accepts or declines the invite.
- ⇒ If you enter the party details manually in case the party doesn't have an email account, the party will be considered active immediately, regardless of whether the invite is ignored, accepted, or declined.

- ⇒ If a business partner already appears in your account database, this business partner will immediately become active on the license application after adding the business partner's data to the "Parties" to the "Application" feature.
- ⇒ If you invite a new business to your license application, you will set up a new business account and choose at least one role for the company. All members of the business can access and read the application data.

Business data can be managed in the "Business Information" view accessible from the user dashboard.

Application data and submission

The application data may necessitate actions depending on the license category and work type selected during the license application creation. The municipal administrator determined this information during the Cloudpermit setup. That way, the correct form for applicants will be automatically added to the license application.

After completing the required application information, applicants will digitally sign off on the license applications before submitting them to the municipal department via Cloudpermit.

Licensing Workflow Phases

The workflow for "Licensing" is divided into two phases: "Application" and "Archival."

- ⇒ The "Application" phase begins once the applicant has completed and submitted the license application to the municipality.
- ⇒ The "Archival" phase begins after the license has been issued.

Municipal administrators can use Cloudpermit to set up an automated archiving system for all issued applications. These applications, as well as all associated data, are stored in the Cloudpermit database and are available at any time.

License Application Issuance Process

The municipal authorities will begin reviewing applicants' license applications once submitted. The application issuance process includes the below-described action steps.

License Application Review

The application review begins when a license application is submitted to the municipal department.

Cloudpermit helps municipal departments manage license application submission reviews by offering a variety of review types that municipal administrators can customize in Cloudpermit. Application forms and attachment types are examples of this.

Furthermore, if the license type necessitates it, municipal authorities can request additional reviews for the application by selecting the review type and assigning it to a suitable reviewer in the "Reviews" section of the license application.

After completing license application evaluations, the reviewer marks the forms and attachments as complete and records the results in Cloudpermit.

The screenshot displays the 'REVIEWS' section of the Cloudpermit interface. At the top, there is a tab labeled '2 REVIEWS' and a button 'ADD NEW REVIEW +'. Below this is a table with columns 'Review', 'Status', and 'Reviewer'. The first row shows a 'General Review' with a status of 'Reviewed' and reviewer 'Fred Builder'. It includes a comment from 'Fred Builder' dated '2023-04-24, 6:50 a.m.' stating 'There are no objections to proceeding.' The second row shows a 'General Review' with a status of 'Changes requested' and reviewer 'Fred Builder'. It includes a comment from 'Fred Builder' dated '2023-04-24, 6:51 a.m.' stating 'Please complete the additional form for the business license application added to your application. The form is in your license application's "Application Data" section.'

Review	Status	Reviewer
General Review	Reviewed	Fred Builder
Comments ✓ 2023-04-24, 6:50 a.m. Reviewed There are no objections to proceeding.		
General Review	Changes requested	Fred Builder
Comments ✗ 2023-04-24, 6:51 a.m. Changes requested Please complete the additional form for the business license application added to your application. The form is in your license application's "Application Data" section.		

A change request will be submitted if the applicant needs to change the application forms or attachments. Cloudpermit creates a task for applicants, which appears in their dashboard's "Task and Requests"

section. In addition, an email will be sent to applicants and business members informing them of the change request in the license application workspace. The assigned reviewer verifies the changes provided in the workspace.

Circulation

For certain license types, such as alcohol licenses, authorities can distribute the license application to third-party organizations for evaluation. The municipality determines the circulation practice and license types and configures them accordingly in Cloudpermit.

The third-party examines the license application in the context of its own rules and issues an opinion in Cloudpermit in favor of or against the license. The circulation result will be saved in the "Circulation" section of the license application workspace.

License Inspections

Inspections are a necessary step in the licensing process. Inspections can be conducted before and after the license issuance. The municipality issuing the license determines this practice.

For more information, see the chapter "Inspections."

License issuance

Following a review of the license application and the absence of any objections to license issuance, the municipal authority prepares a licensing bill that can be paid online or in person as instructed by a municipality.

FEES & PAYMENTS Total due **\$75.00** [Close](#)

[ADD LICENSE BILL +](#) [ADD ADDITIONAL BILL +](#)

UNPAID (1)

License bill		Copy of Fee Schedule 2			
Item	Notes	Quantity	Unit	Unit price	Item total
License Fee		1.0		75	\$75.00
BILL TOTAL					\$75.00
TOTAL DUE					\$75.00

Invoice # Payer: Financial Org (Applicant, Business Owner) [DOWNLOAD INVOICE](#) [CANCEL BILL ↶](#) [SET AS PAID ✓](#)

Furthermore, the municipal authority prepares a license permit using the preconfigured license template. Municipal administrators configure the following default date input configuration settings based on municipal license issuance practices to the license template:

- ⇒ Issue Date
- ⇒ Valid From
- ⇒ Expiration Date

These data input settings can be defined at the main licensing level so that each category level inherits them. They can also be determined separately for each category.

BACK TO WORKSPACE [Home](#) / [Financial Org](#) / [211 HASTINGS](#) / Licenses

Licensing

Draft

211 HASTINGS
PIN
400
Issuer *

Fred Builder

Issued to *

Financial Org (Applicant, Business Owner)

Date issued

4/25/2023

Valid from

4/25/2024

Expiration date

4/30/2025

Applicant, Business Owner
Financial Org
License description

This gaming license legalizes business by international laws and guarantees honesty, decency, and transparency in financial matters.

DELETE DRAFT

ISSUE LICENCE

Once the license has been created, the license application workspace includes a "Licenses" section that houses the draft and issued license permits with PDFs for the license application. The permit is automatically issued once the municipal authority acknowledges receipt of the license fee in Cloudpermit.

Furthermore, Cloudpermit emails automatically the workspace parties informing them that the license permit has been issued.

LICENSES Close

License number	Issued on	Issued by	Status	License document
LIC-2023-0031	2023-04-19, 10:35 a.m.	City 1 Yser	Issued	DOWNLOAD LICENSE

Licensing Features

The Cloudpermit Licensing product provides several key features that enhance the user experience in the licensing workflow. These features include the following:

Cloudpermit Licensing features:

License Register, License View, and "My Businesses" View

Renewal and Revoke Management

Notifications & Alerts

Inspections

Document Management

Data Import

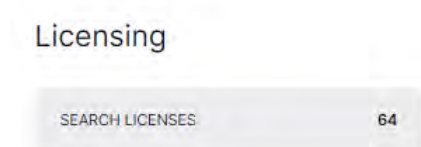
Late Fees Management

Report Management

License Register View

The "License Register" view allows applicants and municipal authorities to find and keep track of issued licenses.

The view is accessible via a widget from the user dashboard. The number displayed in the license registry widget represents the number of valid licenses the user can access in the "License Register" view.



Especially municipalities may have hundreds of active licenses in their registry. Cloudpermit makes searching for, filtering, and sorting licenses in the "License Register" workspace easier by providing a "Search" feature with various search and filter criteria. These include the following:

- ⇒ Free text search.
- ⇒ License status filters (expired, issued, or revoked).
- ⇒ Filter for selecting municipal departments.
- ⇒ Filter for selecting different action items, like open bills or inspections in applications.
- ⇒ Filter for searching for expiring licenses.
- ⇒ Filter for selecting category types.

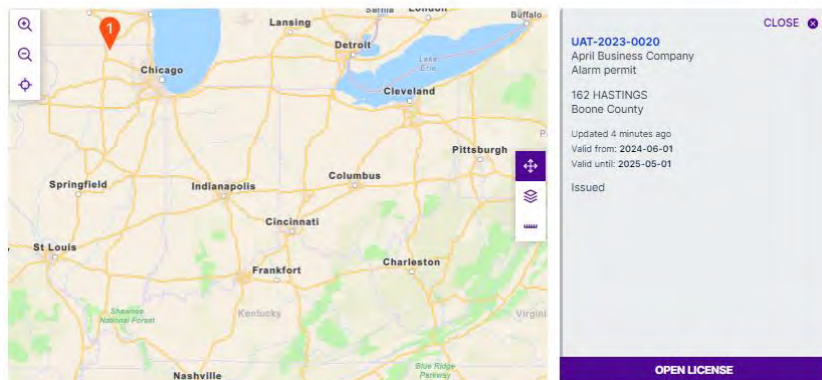
Cloudpermit displays the search and filter results in the "Map" view by default. Clicking the pin on the map opens the selected license card with access to the "License" view.

Licenses (65)

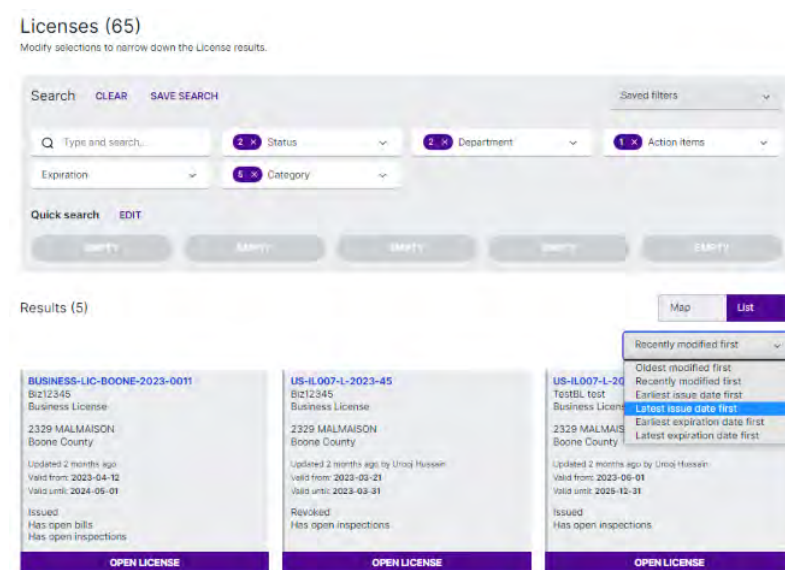
Modify selections to narrow down the License results.

Results (1)

Map List



Selecting a sorting value from the drop-down list on the right under "Results" allows users to sort filtered licenses as cards. This feature applies only to the "List" view mode.



By selecting the license and clicking the "Open License" button, applicants and municipal authorities can access the "License" view through the "License Register" view.

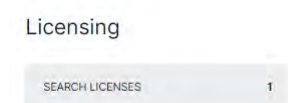
License View

The "License" view displays the issued license applications for applicants and municipal authorities in one place.

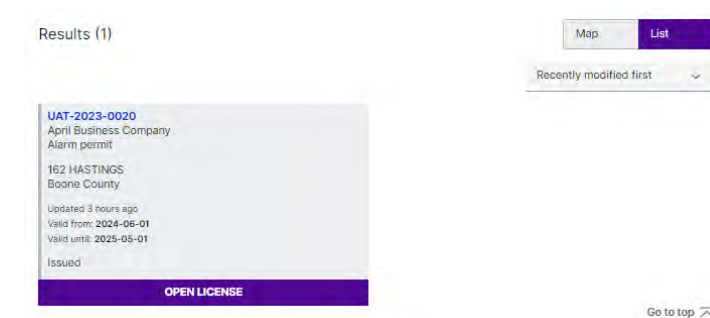
The "License" view for applicants

The "License" view allows users to view their issued license data, like inspections, and request a renewal for the expiring permits.

Applicants will enter the "License Register" view from their dashboard through the "Licensing" widget.



They must select the license and click the "Open License" button on the license card to be redirected to the "License" view.



The "License" view includes the "Inspections" section and the license application workspace entry. Applicants can request a license renewal by clicking the "Renew License" button on the top right of the workspace.

BACK TO DASHBOARD / April Business Company / LIAT-2023-0020 RENEW LICENSE

Alarm permit
162 HASTINGS, Boone County
April Business Company

[DOWNLOAD LICENSE](#)

License status Issued	License number LIAT-2023-0020	PIN 600	Category Alarm permit	Date issued 2023-05-31 by Olivia Administrator
Issued to April Business Company	Valid from 2024-06-01	Expiration Date 2025-05-01		

INSPECTIONS Close

LIAT-2023-0020 Licensing (New)

Inspection	Status	Visits	Last visit / Confirmed time
General Inspection	PASSED	1	2023-05-31

APPLICATIONS Close

Application number	License expiration	Status
LIAT-2023-0020	2025-05-01	ISSUED

The "License" view for municipal authorities

Authority users will be redirected to the selected license application workspace through the "License Register" view.

The "License" view allows municipal authorities to follow up on inspections in license applications or renew or revoke a license. These options are selectable in each application workspace's "More Actions" drop-down menu.

BACK TO DASHBOARD / April Business Company / LIAT-2023-0020 MORE ACTIONS

Alarm permit
162 HASTINGS, Boone County
April Business Company

[DOWNLOAD LICENSE](#)

License status Issued	License number LIAT-2023-0020	PIN 600	Category Alarm permit	Date issued 2023-05-31 by Olivia Administrator
Issued to April Business Company	Valid from 2024-06-01	Expiration Date 2025-05-01		

INSPECTIONS CREATE FOLLOW-UP WORKSPACE Open

APPLICATIONS Open

MORE ACTIONS

- Create follow-up workspace
- Renew license
- Revoke license

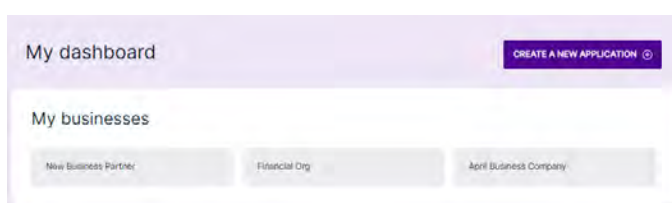
- ⇒ By creating a follow-up workspace for licenses, municipalities can efficiently track inspections for an issued license which can be annual scheduled inspections, random inspections, or inspections made based on a complaint. Authorities can create one follow-up workspace at a time.
- ⇒ Licenses are only valid for a certain period. When the license expires or is about to expire, the holder will request a renewal through the issued license application. Municipalities can easily renew expired licenses by viewing current and historical license data in one place in the application.
- ⇒ Municipal authorities sometimes must cancel a valid license for a specific reason. The "Revoke" feature is available in all issued applications in the "License Register" view.

Business Information View

The "Business Information" view of the business is created when a user adds an existing business as a party or invites a new business as a party to the application workspace. The view displays business contact information, the applications associated with the business, all licenses, and a user management section where administrators can manage business users.

After creating the business party in the "Parties to the Application" section, the business data in the "Business Information" view can be used across license applications in Cloudpermit.

The "My businesses" section appears at the top of the applicant's dashboard once business parties have been created. All current business parties associated with the applicant's account are included. Each business account in the section is linked to the "Business Information" view, accessible by clicking the business name link.



The "Business Information" view includes contact information, a list of business licenses the business owns, and expiring and revoked licenses. Furthermore, administrators of the business account have full access to all information in the "Business Information" view. They can add new members (view-only access) and other administrators (full access to the business data) in the "Users in Business" section. Administrators can also remove other administrators and members from the business account. However, a business account must have at least one administrator.

B_Visible

Boone, Illinois

CONTACT INFORMATION

Business name B_Visible	Business type Partnership	FEIN 999-999-9999
Trade name / DBA B_V	Mailing address	City Boone
State Illinois	ZIP code 12345	Business phone +1 1234567890
Created by		2023-03-29, 11:20 p.m.

BUSINESS LICENSES

Card view List view Close

Licenses

BUSINESS LICENSE Expires on 12/31/2025	BUSINESS LICENSE Expires on 12/31/2023	BUSINESS LICENSE Expires on 12/31/2025
-------------------------------------------	-------------------------------------------	-------------------------------------------

Show expired/revoked licenses

USERS IN BUSINESS

Close

Status	Name	Email	Groups
Active			Administrators

Renewal and Revoke Management

Renewal and Revoke Management are integral to the license application workspaces.

The license renewal process applies to applicants and authorities who can apply for a license renewal on behalf of their customers. The Cloudpermit system sends an email notification to all parties and business representatives in the most recent application workspace well before the license expires, followed by another on the day the permit expires.

The renewal process includes the following:

- ⇒ Renewal of expired licenses
- ⇒ Renewal and late penalty fees

The license holder can create a renewal license application for the expired license in the license application workspace. The business license renewal fee is determined by the type of business and the municipality's fee schedule.

BACK TO DASHBOARD | April Business Company / UAT-2023-0020 | RENEW LICENSE

Alarm permit
162 HASTINGS, Boone County
April Business Company

DOWNLOAD LICENSE

License status Issued	License number UAT-2023-0020	PIN 600	Category Alarm permit	Date issued 2023-05-31 by Olivia Administrator
Issued to April Business Company	Valid from 2024-06-01	Expiration Date 2025-05-01		

INSPECTIONS Open

APPLICATIONS Open

Municipal authorities will manage license renewals in license applications by selecting the "Renew license" option from the "More Actions" drop-down menu.

BACK TO DASHBOARD | April Business Company / UAT-2023-0020 | MORE ACTIONS

Alarm permit
162 HASTINGS, Boone County
April Business Company

DOWNLOAD LICENSE

License status Issued	License number UAT-2023-0020	PIN 600	Category Alarm permit	Date issued 2023-05-31 by Olivia Administrator
Issued to April Business Company	Valid from 2024-06-01	Expiration Date 2025-05-01		

More Actions menu:
Create follow-up workspace
Renew license
Revoke license

Municipal authorities may revoke valid licenses for specific reasons. The reason for the revocation must always be specified. The license holders and the parties in the most recent license application workspace are notified by email that their license has been revoked.

Revoke license

Are you sure?

Reason for revocation

Business License revocation:
Violation of local codes or ordinances.

NO YES

Notifications and Alerts

Cloudpermit automatically sends license expiration notifications to all parties involved in the most recent application workspace.

License renewal notification is triggered based on the municipality's configuration setting. The expiration notification will show on the user interface. Furthermore, the system will send two email notifications: one some days before the license expiry and another one on the expiration day. Municipal administrators can customize email notifications' frequency, notification type, and content.

Furthermore, license renewal notifications submitted will appear in the audit log for the "License" view.

Inspections

Inspections are an integral part of the license application review. They can be conducted before or after the license issuance. Municipalities can decide which type of inspections they require for certain license application types and configure them to Cloudpermit during the system setup.

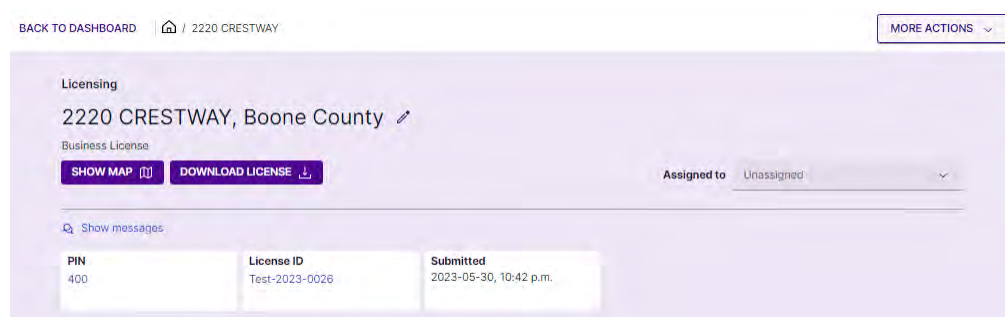
The assigned inspector will conduct an on-site inspection of the business and either pass the inspection or decline it for a reason. The visit result will be recorded in the "All Visits" section of the inspection workspace in Cloudpermit.

Certain types of inspections are performed on issued licenses. They can be scheduled annually, randomly, or in response to a complaint. Municipal authorities can manage inspections from the "License" view.

Document Management

Cloudpermit generates all documents in downloadable and archivable PDF format by default. License documents, such as uploaded attachments, permits, inspection visit results, license fee invoices, and receipts, are automatically saved to the workspace sections to which they belong as PDF templates.

The latest license permit also appears in the application's workspace header, which can be accessed anytime.



Data Import

Authority users can import previously issued business licenses, inspections, and attachments into the Cloudpermit database.

After uploading the Excel sheet columns into license data, such as license number, license holder, address, property ID, and municipality, users can map the Excel file to define a form that will appear in the workspace. Users can preview the draft license and workspace before importing data.

Similarly, license attachments and inspections for existing licenses can be imported.

When a license is imported, Cloudpermit creates and links to a license with a business (if one is required). The application workspace is built using form data from the license import, inspections, and attachments from the "Attachments" and "Inspections" Excel sheets.

Late Fee Management

In licensing, the businesses may need to pay penalties, i.e., late fees, for delays in their payment. The penalty calculation in Cloudpermit is automated, enabling possible high volumes in late fee management. The late fee calculation is determined by the type of business and the municipality's fee schedule.

Cloudpermit supports the following types of late fees:

- ⇒ One-time fees
- ⇒ Recurring monthly fees

The administrator can define the fee as any other item for one-time and recurring monthly fees (flat or calculated). Furthermore, the administrator must specify the maximum number of months for recurring monthly fees (2 - 12).

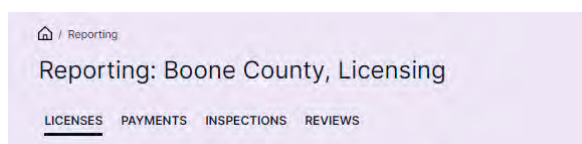
- ⇒ If the license renewal is late, the administrator can set the late fee as "one-time" and add it as a new fee item in the license bill.
- ⇒ If the late fee is "recurring monthly," the administrator adds a new fee item to the bill and calculates how many months it has been late.

The late fees must be calculated automatically when a bill is created. The license's expiration date must be checked if a late fee is specified for the license bill. Furthermore, bank holidays and weekends are to be considered.

When Cloudpermit calculates lateness and penalty fees, a bill can be assigned a due date, usually the next weekday. Municipalities can also use Cloudpermit to connect licensing fees to their fee schedule.

Report Management

Licensing enables municipal authorities to create basic reports for licensing organizations in Cloudpermit.



Creating reports can help a municipality with compliance, revenue regeneration, planning, and resource allocation and promote transparency and accountability.

Municipal authorities can generate licenses, payments, inspections, and review reports.

Users can choose one report at a time and customize its time range, license type (submitted/issued), and permit categories. Cloudpermit supports CSV and Excel spreadsheet report formats.

License Reports

License reports include submitted applications and issued licenses.

- ⇒ For the submitted applications, the report includes a list of license applications with a submitted date within the selected time range and matches any other filter (e.g., category).
- ⇒ For the issued licenses, the report displays a list of all applications with a given date within the time range and matches any other filter (e.g., category).

Payment Reports

Payment reports include "Online Payments" (the default option) and "Fees and Payments."

Inspections Reports

Inspection reports help to ensure regulatory compliance and promote public health and safety in the municipality. The inspection report includes "Inspections," "Site Visits," "Open Inspections," and "Order."

- ⇒ "Inspections" display a list of applications with a "submitted date" within the chosen time range and match any other filter (e.g., category).
- ⇒ "Site Visits" displays a list of all applications with an "issued date" within the time range that matches any other filter (e.g., category).
- ⇒ "Open inspections" displays a list of all inspections that are not completed and match any other filter.
- ⇒ "Orders" displays a list of all issued orders where the order's time of issuance is within the time range.

Review Reports

Report-type options for review reporting include reviews and review events.

Reviews display a list of applications with a "Review start date" within the time range and match any other filter (e.g., category or a review name).

Review events display a list of applications with an "Event date" within the time range and match any other filter (e.g., category or a review name).

Configuration Description

The tables below display the Cloudpermit Licensing features configuration.

Approver Groups		
Section	Component	Description
Circulation groups	Circulation groups	It enables to add and edit circulation groups in the municipality.

Configuration		
Section	Component	Description
License categories	License categories	It allows changing the license category description.

License categories	Disable location services for new workspaces	It allows not displaying location services for new workspaces.
License categories	Renewal limit	It defines how many days before the expiration of a license can be renewed (earliest renewal point). If left empty, there will be no limit for the renewal.
License categories	License notifications for the first and second renewal	Users can set how many license notifications will be for the first and second renewals.
License categories	License defaults	Users can set license defaults for the date issued, date of issuance, valid from, and expiration dates.
Attachment types	Add a new attachment type	It includes available attachment types for licenses.
Party roles	Add a new party role	It includes new party roles not used in previous license applications.
Required forms, attachments, and configs	Forms	These settings define which forms are included and which attachments and review configs are required in different license applications.
License numbering	License number	A license number is assigned to a license when it is issued. These settings allow administrators to customize how the license number is generated. Custom license numbers will always include the current year and a sequential number.
License numbering	Reset the counter to the change of the year.	Users can reset the counter on the year change by enabling the option.
License numbering	Assign a new number on renewal	Users can assign a number on renewal by enabling the option

Data Import		
Section	Component	Description
Data Import	Import a spreadsheet	It enables importing licenses, inspections, and attachments.

Fees		
Section	Component	Description
Fee schedule	Configuration	It includes a list of available fees specific to each customer.
Other settings	Online payment	It enables Cloudpermit to be configured to accept online payments from various service providers.

Inspections:		
Section	Component	Description
Settings	Settings	Cloudpermit enables configuring the following settings: inspection phases and visibility, time tracking, orders, quick pass, internal notes, and managing available qualification types, Phares, and freeze time. Furthermore, Cloudpermit supports two timeslots for inspection scheduling: 8.00 a.m. – 12.00 a.m. and 12.00 p.m. – 4.00 p.m.
Inspection types	Create a new inspection type	It enables the creation of new inspection types.
Visit results	Add a new visit result.	It enables additional inspection visit results that are selectable when a prominent result is selected in the "Visit result" section of the inspection template.
Inspector working areas	Upload shapefile	

Payment System		
Section	Component	Description
Payment System settings	Configure payment page settings	It enables configuring payment page settings.

Reporting		
Section	Component	Description
Reporting	Report types	It includes the following reporting types and their settings: licenses, payments, inspections, and reviews.

Review configs		
Section	Component	Description
Manage available reviews	Time tracking	It enables time tracking for reviews and selecting available reviews for the organization.
Manage available reviews	Available reviews	It enables adding new reviews to applications.

Templates		
Section	Component	Description
Permit templates	Templates	It includes various license templates with customizable layouts.

User management		
Section	Component	Description
User management	Add a new user	It enables adding a new user, editing user permissions and groups, and removing a user.

Working Day Calendar		
Section	Component	Description
Working Day Calendar	Select a day when inspections are conducted.	It enables the selection of working days when inspectors are available.
Working Day Calendar	Add a new working day.	It enables public holidays that affect processing time calculation, late fee calculation, and when inspections are not conducted.

Licensing Personas in Business Accounts

A business is created when a user adds a business as a party to an application. This action makes the user an administrator in the business account. A business account must always have at least one administrator. The administrator can invite and remove administrators and members from the business account.

Cloudpermit Licensing has two personas: administrators and members. Each persona is responsible for tasks or has privileges for specific workflows within Licensing.

Persona	Tasks /Workflow
Administrator Cloudpermit administrators have complete editing access to the business.	<ul style="list-style-type: none"> ○ An Administrator can access the business accounts to which the person has been nominated as an Administrator. ○ An Administrator can add administrators and members to business accounts to which the person has been nominated as an Administrator. ○ An Administrator can edit contact information from the "Business Information" view. ○ An Administrator can add new administrators and members and remove them from the business account.
Member	<ul style="list-style-type: none"> ○ A member has read-only privilege in business accounts. ○ A member can access the application workspace but not change it.

Here's a quick rundown of the user permissions in business accounts:

- ⇒ The municipality that created the business account retains editing permissions on the business information, including user invites, until the first admin invite for the account is accepted.
- ⇒ The business account is treated the same as any other, with only the business admin having edit access.
- ⇒ The first person to be invited becomes the administrator. Only after an administrator party is included can the municipality's control be retracted.
- ⇒ Administrators cannot remove themselves from a business if they are the last administrators to prevent a business entity from becoming orphaned.

Cloudpermit Third-Party Integrated Systems

Cloudpermit has standard configurable integrations to over twenty (20) systems categorized under six different integration types described below.

Suppose the need for integration with a standard configurable integration cannot be fulfilled. In that case, Cloudpermit may integrate a new system, make a minor change to an existing one, or develop a custom one. These integrations are priced separately and, if applicable, addressed within your contract.

Standard Configurable Third-Party Integrations

Cloudpermit has integrations to third-party systems that can be configured for the client as part of the standard implementation. These integrations may include monthly or annual fees, which will be stated in a contract.

Geographic Information System (GIS)

Cloudpermit supports a one-way integration with the municipal authority's GIS to search properties by civic address or property identifier, retrieve property information, read map layers to be shown on maps, and retrieve owner information.

Supported GIS integrations include the following:

- **ESRI ArcGIS**
- **CGIS**
- **CartoVista**
- **MuniSight**

Online Payment

Cloudpermit integrates with most online payment providers through various checkout systems or payment gateways to process fees and dues. Users can choose an online payment option for their bills when an online payment integration is configured for a municipality.

Payer information and bill contents are sent to the PCI-compliant payment provider and forwarded to the provider's checkout page. The payment provider returns information about the success of the payment. Where necessary (and possible), the convenience fees are configured in the payment system.

Supported Online Payment integrations include the following:

- **Allpaid**
- **Bambora**
- **CCP/NIC Online Payment**
- **ePay**
- **E-xact**
- **Government Window**
- **Merchante**
- **Moneris**
- **OpenEdge**
- **Paymentus**
- **PayNowlink**
- **Square**
- **Stripe**
- **Payeezy**
- **Municipal Services Bureau (MSB)**
- **Point & Pay**

Authentication through Open ID Connect (OIDC)

When a user account is linked to an external system for authentication, Cloudpermit sends the authentication through an Open ID Connectivity (OIDC) API (Application Program Interface) to a third-party login page for the organization.

With this integration, the whole authentication happens in the third-party system, which returns a success of authentication to Cloudpermit. The integration does not include authorization; all groups and permissions are managed in Cloudpermit.

Supported OIDC authentication integrations include the following:

- **Azure AD**

Additional AD integrations are priced separately and, if applicable, addressed within your contract.

Multi-Factor Authentication (MFA)

When a Multi-Factor Authentication (MFA) is needed for a department, Cloudpermit login will require at least Two-Factor authentication.

After successful Cloudpermit authentication, the users will be sent to a third-party system for second-factor authentication, such as a mobile app or Security Management System (SMS).

The third-party system must supply an OIDC (Open ID Connect) interface, and it returns the success of the second-factor authentication to Cloudpermit.

Supported MFA integration includes the following:

- **Duo**

Additions and Minor Changes to Third-Party Integrations

Cloudpermit adds integrations with new systems if the integration is for an existing integration type, e.g., Online Payment or GIS. Cloudpermit has confirmed that the third-party system has Application Program Interfaces (APIs) that support the current integration model.

All integrations to new systems and minor changes to existing system integrations must be agreed upon separately, and they are not included in the standard implementation.

Delivery may contain a development fee and an annual or monthly fee.

Cloudpermit will give an estimated future release for integration upon agreement.

Custom Integrations

All other integrations, not Configurable Standard integrations, minor changes to existing integrations, or new systems with an existing integration type are considered Custom Integrations.

All custom integrations require a feasibility study and specifications before the agreement. Cloudpermit will give an estimated future release for integration upon agreement.

Delivery of a Custom Integration contains a development fee and an annual or monthly fee.

Integrations with Backend Systems

In backend system integrations, Cloudpermit leverages an integration process that enables sending the information to a backend system.

- ⇒ Cloudpermit creates a folder in the backend system for each workspace.
- ⇒ Cloudpermit will link the properties and contacts into the folder and make new contacts if necessary.
- ⇒ Cloudpermit updates the folder status and specified data fields in the folder.

Integration can be configured to include the transfer of fees to the backend system. Completed reviews and inspections can be configured to be transferred too. The integration setup will require changes in the back-end system and mapping statuses and codes between the systems.

Integrated backend solutions are priced separately and, if applicable, addressed within your contract.

Integrations with Electronic Archives

This type of integration sends the content of a workspace to an external system for archival. The third-party systems are Enterprise Content Management (ECM) or Electronic Archives. Cloudpermit will create an archival folder in the third party, write the values of the configured data fields in the folder, and transfer configured attachments into the folder for archival.

Integrated electronic archive solutions are priced separately and, if applicable, addressed within your contract.

A woman wearing a white hard hat and a high-visibility safety vest over a plaid shirt is shown in profile, looking at a tablet device. The background is dark with some blurred lights, suggesting an outdoor construction or industrial setting at night. The overall image has a blue tint.

Cloudpermit Planning USA Product Description 2023

Cloudpermit 
Products |

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General Description

Cloudpermit is an online community development software that provides local governments with Software-as-a-Service (SaaS) products available 24/7.

The Cloudpermit product portfolio includes the Building Permitting, Planning, Land Use Permitting, and Code Enforcement products.

This product description applies to the Planning product.

The information in this document is subject to change without notice aligning with future releases. Releases supply information about new features and non-security updates.

Cloudpermit Core Benefits

Cloudpermit supplies one complete end-to-end product for local governments to manage the entire building, licensing, and planning e-permitting and code enforcement case process. It allows all parties integral to the process, from applicants to authorities to key stakeholders. This ensures that all parties receive real-time information about applications, licenses, and cases.

Below are described the primary benefits Cloudpermit provides to its customer base:

- ⇒ Cloudpermit standardizes local government's building, licensing, planning, and code enforcement processes by supplying the best digital practices.
- ⇒ The 24/7 online service on any browser or operating system allows remote and mobile work on-site.
- ⇒ Monthly releases enable automatic updates to the product providing the latest updates and enhancements while not requiring users to download or install any software files.
- ⇒ A cloud-based SaaS product provides a quick and easy implementation with a municipality-based configuration, lessening the burden on municipal resources.
- ⇒ Through interactive maps, local governments can use high-quality location data and up-to-date property information. This up-to-date property information is derived directly from the local government's Geographic Information System (GIS).
- ⇒ Workspaces enable instant collaboration and communication within applications and code enforcement cases, simultaneously speeding up processes and improving the workflow for all involved parties.

Cloudpermit Planning

The Cloudpermit Planning product helps streamline processes associated with the day-to-day responsibilities of planning departments. It offers unique features to assist with pre-consultation, circulation, public notice, and much more.

Cloudpermit Planning product enables the following:

- ⇒ It provides online software for local government planning department customers, which helps them to manage applications efficiently and effectively.
- ⇒ It allows the public to submit and track their applications online.

The Cloudpermit software is automatically updated periodically with the latest updates and enhancements, not requiring users to download or install any software files.

Cloudpermit Planning Key Core Features

The Cloudpermit Planning software provides **Pre-Consultation, Committee and Council Meetings, Public Notice, Circulation, Conditions and Comments, and Processing Time Calculator** features to enhance an excellent user experience in the planning workflow.

Cloudpermit Planning Key Core Features:
Pre-Consultation
Committee and Council Meetings
Public Notice
Circulation
Conditions and Comments
Processing Time Calculator

Pre-Consultation

The Pre-Consultation feature is for applicants and municipal authorities.

Pre-consultation is an interactive process where applicants and their authorized representatives can present and discuss a development proposal with relevant staff and external agencies in the local government well advanced of the project start.

Cloudpermit enables municipalities to track and document their pre-consultation process digitally.

The pre-consultation process is as follows:

- ⇒ Applicants request a pre-consultation through a guided step-by-step process in Cloudpermit. The pre-consultation usually includes one or more meetings between the parties, which the municipal planning authority sets up via Cloudpermit.
- ⇒ Upon meeting completion, the municipal authority prepares a pre-consultation report and a draft approval application with requirements for the applicants to submit to the municipality in Cloudpermit.

The submitted pre-consultation request in the pre-consultation workspace.

The screenshot displays the 'Planning Approval' workspace for '101 FIRST ST NW, Pulaski'. The header includes the address and zoning type 'Res zoning / Future Land Use Amendment: Commercial/Industrial'. Below this are buttons for 'SHOW MAP' and 'HIDE FULL DATA'. A 'Show messages' section shows a 'Submitted' status on '2022-09-05, 9:28 a.m.'. A table lists application details: PIN (072-140-0000-100A), Application number, Municipal ID (4334), Property code (Commercial/Industrial), and Zoning (PUL_B3). The 'PRE-CONSULTATION' section shows the current step as 'REQUESTED 2 / 4' with 'NEXT STEP: IN PROGRESS'. Below this are expandable sections for 'PARTIES TO THE APPLICATION', 'PROJECT DATA', and 'ATTACHMENTS'.

Committee and Council Meetings

The Committee and Council Meetings feature is essential to the planning approval process. Following a strict municipality-based protocol, these meetings are held to decide on planning applications under agreed policies in the local government.

Cloudpermit allows municipal planning authorities to manage better the meeting dates. If municipal authorities participate in meetings across local governments, they provide a shared view of each committee and council associated with the user.

Each approval application can be assigned to an upcoming meeting enabled within Cloudpermit, automatically creating, and sharing agendas and other relevant documents within the Committee and Council Meeting feature.

The "Committee and Council Meetings" section in the application workspace.

The screenshot shows the 'Planning Approval' workspace. At the top, there's a breadcrumb trail: 'APPLICATION > FULFILLMENT'. Below this, a progress bar indicates the current step is 'IN APPROVAL 6 / 8' and the next step is 'IN UPPER-TIER APPROVAL'. The main section is titled 'Planning Approval' and contains four tabs: 'Parties', 'Application', 'Attachments', and 'Road & Footprints'. The 'Parties' tab is active, showing a section titled 'PARTIES TO THE APPLICATION' with an 'Open' button. Below this, there's a section titled 'COUNCIL AND COMMITTEE MEETINGS' with a 'Close' button. A meeting entry is listed: 'Pulaski City Council meeting, Pulaski' on '2022-09-21, 12:00 p.m.'. To the right of the entry, it says 'These are the notes for the meeting. Maybe visible on Public notice?'.

Public Notice

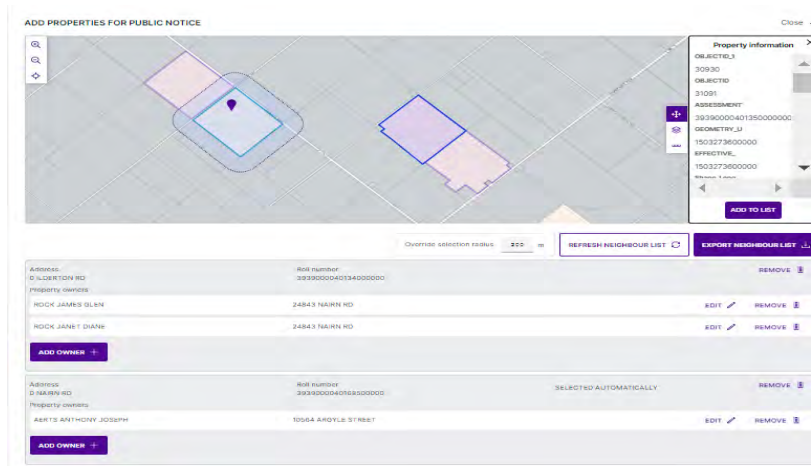
The Public Notice feature allows municipal authorities to manage information and tasks relating to public hearings and notices of specific planning applications in Cloudpermit. It also helps neighbors and citizens supply their opinions on the planning proposal as part of the approval process.

Through Cloudpermit's *Public Notice* feature, municipal authorities can notify the public of specific planning application-related matters online and display an advert in their local newspapers. Cloudpermit also supplies a standard "public notice letter" template that can be shared in traditional media and circulated to nearby property owners.

Cloudpermit supplies buffer zone functionality that finds properties and their owners within a radius decided by the municipal authority.

A listing of mailing addresses of property owners can be enabled with the proper integrations with the municipal authority's GIS property data.

The workspace for adding properties to the public hearing in the Public Notice feature.

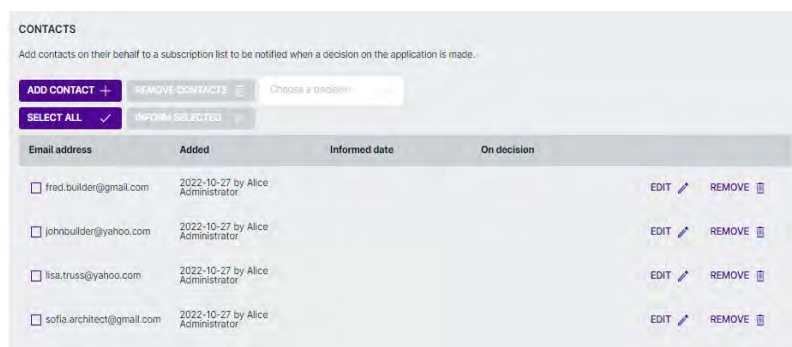


Cloudpermit supplies a maintenance feature to manage the citizen mailing list, providing updates on each application's decisions.

The planning department authorities can add new contacts to the public notice contact list in Cloudpermit. At the same time, citizens can self-register to receive the application decision, either approval or denial, through a link or a QR code.

Users who sign up via the QR code will automatically be notified, while users added manually must be notified manually.

The "Contacts" section of the Public Notice feature.



The self-registering options in the Public Notice feature.



Circulation

Circulation is an essential part of processing workspaces within Cloudpermit.

Cloudpermit allows municipalities to decide which internal and external organizations, agencies, and corporations may participate as stakeholders in the Circulation process and add them to the municipality's approver groups in Cloudpermit.

In practice, the responsible municipal authority circulates the planning approval to the stakeholders, such as fire, water, or sewerage departments requesting comments or approvals in Cloudpermit. This way, comments and approvals can be requested from all stakeholders concurrently in real-time, which speeds up the approval processes.

Cloudpermit supplies user management and task assignment functionalities for stakeholder organizations to manage their requests and internal circulation. However, the planning department's authorities can control who can see the original comments online. Cloudpermit also notifies the assigned circulation authorities or organization's administrators of new circulation requests and approaching due dates.

Additionally, Cloudpermit allows municipal department authorities to complete the circulation request on the stakeholders(s) behalf and record their results on Cloudpermit.

That way, Cloudpermit can help municipal authorities ensure all circulations are accurately recorded on Cloudpermit and save time.

After circulation, the requesting authority prepares and publishes a report to applicants, including received comments and approvals for the project. Cloudpermit notifies the assigned circulation authorities or the organization's administrator of new circulation requests and approaching due dates.

Conditions and Comments

Municipal planning authorities may impose conditions for planning projects in Cloudpermit. Conditions can enhance development quality and enable development where it would have been necessary to refuse planning approval.

The Planning approval workspace includes a section for establishing and commenting on conditions. All conditions must be closed before the final approval.

The "Conditions and Comments" section in the application workspace.

CONDITIONS AND COMMENTS Close ^				
0 Conditions				
6 1. Plans Renewal				
Id	Title	Round	Status	Assignee
#1	The site plan is not comprehensive enough	1	Responded	Fred Builder (Agent, Applicant, Property owner, Designer, Payer)
#2	Plan amendment rezoning	1	Open	Fred Builder (Agent, Applicant, Property owner, Designer, Payer)
#3	Amendment rezoning	1	Cleared	Fred Builder (Agent, Applicant, Property owner, Designer, Payer)
#4	Site plans for the project	1	Noted	Sofia Doc (Agent, Designer)

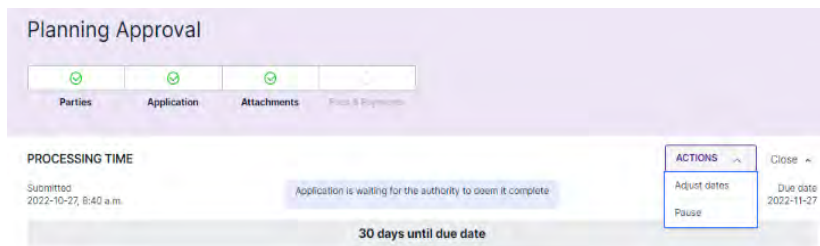
Processing Time Calculator

The Processing Time Calculator feature allows local governments to set processing times and deadlines for each approval application type or internal target.

Supplying transparency into processing times and deadlines, this feature automatically calculates application review and decision-making deadlines for each application and displays their urgency on the user's dashboard.

Targets can be paused or adjusted at any time. Additionally, applications can be sorted based on the closest or further due date to help planning departments keep track of the dates.

The Processing Time Calculator feature in the application workspace.



Configuration Tools

Administrative users can adjust the service to the municipality's requirements using Cloudpermit's configuration tools.

Cloudpermit unique configuration enables the following:

- ⇒ Managing planning approver and user groups and application type configuration with requirements for each type.
- ⇒ Automating notifications, for example, for permit expiry.
- ⇒ Managing review configurations, application approval fees, and system language selections.
- ⇒ Managing document templates and role-based permissions in Cloudpermit.

Additionally, Cloudpermit provides planning departments various templates and forms, such as a planning report and a public notice template.

Cloudpermit Configuration

The tables below display the Cloudpermit Planning features configuration.

Configuration:

Section	Component	Description
Application type - categories	Category description	It allows changing the description of a category.
Application type - categories	Project types	It includes Category, Scope, and Proposed Use project types.
Attachment types	Add a new attachment type	It includes available attachment types for permits.
Application number	Application number	It allows assigning a numbering system to a municipality.

Pre-Consultation:

Section	Component	Description
Managing forms	Required forms	It allows adding required forms to applications.
Managing required attachments	Required attachments	It allows adding required attachments to applications.
Managing required party roles	Required party roles	It allows adding required party roles to applications.

Committees and Councils:

Section	Component	Description
Adding new committees and councils	Committee and councils	It allows adding new committees and councils to the municipality.

Application and Review:

Section	Component	Description
Sign off	Compliance language	It allows a wording specific to country/province/state.

Processing Time Calculator:

Section	Component	Description
Processing time calculator	Application configuration	It enables to select of the processing time calculator for municipality groups.
Processing days	Application configuration	It enables setting target times in days and calculation times in business days or calendar days.

Public Notice:

Section	Component	Description
Public Notice Letter	Templates	It enables configuring a Public Notice letter template.
Neighbor default radius	Application configuration	It enables adjusting the default radius neighbors for the Public Notice feature.

Fees Management:

Section	Component	Description
Fee schedule	Configuration	It includes a list of available fees specific to each client.

Other settings	Online payment integration	It allows configuring Cloudpermit to accept payment from online providers.
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Templates:

Section	Component	Description
Templates	PDF Templates	It includes report templates with customizable layout.
Location for the application	Extra map layers	Cloudpermit can enable additional map layers for the client.

Cloudpermit Third-Party Integrated Systems

Cloudpermit has standard configurable integrations to over twenty (20) systems categorized under six different integration types described below.

Suppose the need for integration with a standard configurable integration cannot be fulfilled. In that case, Cloudpermit may provide integration to a new system, make a minor change to an existing one, or develop a custom one. These integrations are priced separately and, if applicable, addressed within your contract.

Standard Configurable Third-Party Integrations

Cloudpermit has integrations to third-party systems that can be configured for the client as part of the standard implementation. These integrations may include monthly or annual fees, which will be stated in a contract.

Geographic Information System (GIS)

Cloudpermit supports a one-way integration with the municipal authority's GIS to search properties by civic address or property identifier, retrieve property information, read map layers to be shown on maps, and retrieve owner information.

Supported GIS integrations include the following:

- ESRI ArcGIS
- CGIS
- CartoVista
- MuniSight

Online Payment

Cloudpermit integrates with most online payment providers through various online checkout systems or payment gateways to process fees and dues. Users can choose an online payment option for their bills when an online payment integration is configured for a municipality.

Payer information and bill contents are sent to the PCI-compliant payment provider and forwarded to the provider's checkout page. The payment provider returns information about the success of the payment. Where necessary (and possible), the convenience fees are configured in the payment system.

Supported Online Payment integrations include the following:

- Allpaid
- Bambora
- CCP/NIC Online Payment
- ePay
- E-xact
- Government Window
- Merchante
- Moneris
- OpenEdge
- Paymentus
- PayNowlink
- Square
- Stripe
- Payeezy

Authentication through Open ID Connect (OIDC)

When a user account is linked to an external system for authentication, Cloudpermit sends the authentication through an Open ID Connectivity (OIDC) API (Application Program Interface) to a third-party login page for the organization.

With this integration, the whole authentication happens in the third-party system, which returns a success of authentication to Cloudpermit. The integration does not include authorization; all groups and permissions are managed in Cloudpermit.

Supported OIDC authentication integrations include the following:

- **Azure AD**

Additional AD integrations are priced separately and, if applicable, addressed within your contract.

Multi-Factor Authentication (MFA)

When a Multi-Factor Authentication (MFA) is needed for a department, Cloudpermit login will require at least Two-Factor authentication.

After successful Cloudpermit authentication, the users will be sent to a third-party system for second-factor authentication, such as a mobile app or Security Management System (SMS).

The third-party system must supply an OIDC (Open ID Connect) interface, and it returns the success of the second-factor authentication to Cloudpermit.

Supported MFA integration includes the following:

- **Duo**

Additions and Minor Changes to Third-Party Integrations

Cloudpermit adds integrations with new systems if the integration is for an existing integration type, e.g., Online Payment or GIS. Cloudpermit has confirmed that the third-party system has Application Program Interfaces (APIs) that support the current integration model.

All integrations to new systems and minor changes to existing system integrations must be agreed upon separately, and they are not included in the standard implementation.

Delivery may contain a development fee and an annual or monthly fee.

Cloudpermit will give an estimated future release for integration upon agreement.

Custom Integrations

All other integrations that are not Configurable Standard integrations, minor changes to existing integrations, or new systems with an existing integration type are considered Custom Integrations.

All custom integrations require a feasibility study and specifications before the agreement. Cloudpermit will give an estimated future release for integration upon agreement.

Delivery of a Custom Integration contains a development fee and an annual or monthly fee.

Integrations with Backend Systems

In backend system integrations, Cloudpermit leverages an integration process that enables sending the information to a backend system.

- ⇒ Cloudpermit creates a folder in the backend system for each workspace.
- ⇒ Cloudpermit will link the properties and contacts into the folder and make new contacts if necessary.
- ⇒ Cloudpermit updates the status of the folder and specified data fields in the folder.

Integration can be configured to include the transfer of fees to the backend system. Completed reviews and inspections can be configured to be transferred too. The integration setup will require changes in the backend system and mapping statuses and codes between the systems.

Integrated backend solutions are priced separately and, if applicable, addressed within your contract.

Integrations with Electronic Archives

This type of integration sends the content of a workspace to an external system for archival. The third-party systems are Enterprise Content Management (ECM) or Electronic Archives. Cloudpermit will create an archival folder in the third party, write the values of the configured data fields in the folder, and transfer configured attachments into the folder for archival.

Integrated electronic archive solutions are priced separately and, if applicable, addressed within your contract.

A woman wearing a white hard hat and a high-visibility safety vest over a plaid shirt is shown in profile, looking at a tablet device. The background is dark with some blurred lights, suggesting an outdoor night setting. The overall tone is professional and tech-oriented.

Cloudpermit Data Import

March 2023

Description

Cloudpermit Data Import allows the Customer to import the Customer's existing legacy data (applications, permits, inspections, and attachments) into the Cloudpermit system.

The information in this document is subject to change without notice aligning with future releases.

Data Import Process

The data import process includes five (5) steps:

1. Exporting data from the Customer's existing system.
2. Adding the exported data into an Excel spreadsheet.
3. Reviewing the data in the spreadsheet.
4. Correcting possible errors in the spreadsheet.
5. Importing data into the Cloudpermit system.

Roles and responsibilities

1. *Exporting data from existing system:* Customer is responsible for exporting cleansed and normalized data from its existing system into a CSV file format.
 - Data Cleansing: the process of fixing incorrect, incomplete, duplicate or otherwise erroneous data in a data set.
 - Data Normalization: the process of organizing data entries so they appear similar across all fields and records, making it possible to find, group and analyse the information.
2. *Adding exported data into an Excel spreadsheet.* Customer adds the data into the Cloudpermit-provided Excel template. Customer is responsible that the data matches the Excel template's format.
3. *Reviewing data.* Cloudpermit does one round of reviewing the spreadsheet and provides information to Customer about possible errors in entry of the data to the Excel spreadsheet.
4. *Possible correction of errors.* Customer corrects possible errors and provides a cleansed Excel spreadsheet back to Cloudpermit.
5. *Import data into Cloudpermit system.* Cloudpermit and Customer imports the data from the spreadsheet into the Cloudpermit system.

After data has been successfully imported to Cloudpermit, the Customer can find and use the data in the Cloudpermit workspace section as if it would have been created in the Cloudpermit system.

Excel Spreadsheet and data requirements

In order for the content to operate properly within the Cloudpermit system, the exported data will need to be in certain required column and format. Cloudpermit provides an Excel template to Customers who are importing data. The examples below shows the required formatting for each import and field found within the Import Excel templates:

Workspace Import format requirements

Column	Field Name	Required Y/N	Field Type	Req. Formatting
B	Permit Number	YES	TEXT OR NUMBER	N/A
C	Location	YES	TEXT OR NUMBER	Match GIS Format
D	Municipality	NO	TEXT OR NUMBER	N/A
E	Roll Number/PIN	YES	TEXT OR NUMBER	Match GIS Format
F	Permit description	NO	TEXT OR NUMBER	N/A
G	Category	NO	TEXT OR NUMBER	Map to CP Categories
H	Work Type	NO	TEXT OR NUMBER	Map to CP Categories
I	Work Target	NO	TEXT OR NUMBER	Map to CP Categories
J	Workspace Status	NO	TEXT OR NUMBER	Map to CP Categories
K	Assignee (Workspace)	NO	TEXT OR NUMBER	Map to CP Users
L	Date Submitted	NO	DATE AND TIME	MM/DD/YYYY 00:00:00
M	Date issued	NO	DATE AND TIME	MM/DD/YYYY 00:00:00
N	Issued by	NO	TEXT OR NUMBER	N/A
O	Zoning	NO	TEXT OR NUMBER	Match GIS Format
P	Worksla	NO	TEXT OR NUMBER	N/A
Q	Construction cost	NO	NUMBER	N/A
R	Applicant first Name	NO	TEXT OR NUMBER	Initcap
S	Applicant last name	NO	TEXT OR NUMBER	Initcap
T	Applicant street address	NO	TEXT OR NUMBER	N/A
U	Applicant unit number	NO	TEXT OR NUMBER	N/A
V	Applicant postal code	NO	TEXT OR NUMBER	N/A
W	Applicant municipality	NO	TEXT OR NUMBER	N/A
X	Applicant province	NO	TEXT OR NUMBER	N/A
Y	Applicant corporation or partnership	NO	TEXT OR NUMBER	Initcap
Z	Applicant mobile phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AA	Applicant other phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AB	Applicant email	NO	TEXT OR NUMBER	N/A
AC	Owner first name	NO	TEXT OR NUMBER	Initcap
AD	Owner last name	NO	TEXT OR NUMBER	Initcap
AE	Owner street address	NO	TEXT OR NUMBER	N/A
AF	Owner unit number	NO	TEXT OR NUMBER	N/A
AG	Owner postal code	NO	TEXT OR NUMBER	N/A
AH	Owner municipality	NO	TEXT OR NUMBER	N/A
AI	Owner province	NO	TEXT OR NUMBER	N/A
AJ	Owner corporation or partnership	NO	TEXT OR NUMBER	Initcap
AK	Owner mobile phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AL	Owner other phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AM	Owner email	NO	TEXT OR NUMBER	N/A
AN	Builder first name	NO	TEXT OR NUMBER	Initcap
AO	Builder last name	NO	TEXT OR NUMBER	Initcap
AP	Builder street address	NO	TEXT OR NUMBER	N/A
AQ	Builder unit number	NO	TEXT OR NUMBER	N/A
AR	Builder postal code	NO	TEXT OR NUMBER	N/A
AS	Builder municipality	NO	TEXT OR NUMBER	N/A
AT	Builder province	NO	TEXT OR NUMBER	N/A
AU	Builder corporation or partnership	NO	TEXT OR NUMBER	Initcap
AV	Builder mobile phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AW	Builder other phone	NO	TEXT OR NUMBER	(XXX) XXX-XXXX
AX	Builder email	NO	TEXT OR NUMBER	N/A
AY	Permit Comments	NO	TEXT OR NUMBER	N/A

*Initcap = replace the first letter of every word in a character string with an uppercase letter.

Inspection Import format requirements

Column	Field Name	Required Y/N	Field Type	Field Formatting
B	Permit Number	YES	TEXT OR NUMBER	N/A
C	Inspection Type	YES	TEXT OR NUMBER	Map to CP Inspections
D	Result for this visit	NO	TEXT OR NUMBER	Map to CP Results
E	Site Conditions	NO	TEXT OR NUMBER	N/A
F	Internal Notes	NO	TEXT OR NUMBER	N/A
G	Inspection Date	NO	DATE AND TIME	MM/DD/YYYY 00:00:00
H	Inspector	NO	EMAIL (USER IN CLOUDPERMIT)	N/A
I	Inspector Status	NO	TEXT OR NUMBER	Map to CP Statuses
J	Inspection Comments	NO	TEXT OR NUMBER	N/A
K	Requested inspection start time	NO	DATE AND TIME	MM/DD/YYYY 00:00:00
L	Confirmed inspection start time	NO	DATE AND TIME	MM/DD/YYYY 00:00:00

Attachment Import format requirements

Column	Field Name	Required Y/N	Field Type	Field Formatting
B	File Name	YES	TEXT OR NUMBER	N/A
C	Permit	YES	TEXT OR NUMBER	N/A
D	Attachment Type	NO	TEXT OR NUMBER	N/A
E	Description	NO	TEXT OR NUMBER	N/A