Getting Started: Info Gathering!

Your first step in setting up your ViewPoint Cloud permitting site is to collect your city's or town's permitting and licensing information, pricing, and inspection details to help you get organized.

Collecting all of this information at the beginning will help you streamline your set up and get you up and running in no time!

Permits & License Information
Which departments/offices offer permits/licenses?
These will be considered your "categories" on your ViewPoint Cloud site. The different types of permits/licenses available are grouped by those categories, making it easy for applicants to find what they need.

Collect the following documents:
- **Current permit/licensing forms.**
  You'll be able to replicate them during your set up. There are a variety of field types available, such as text fields and drop down menus. You can make certain fields or sections required. And you have the ability to hide certain fields from the public and use them only internally.

- **The corresponding fee schedules.**
  Our system handles different fee structures, percentages, etc. The fees can be based on certain fields in the application. You can even set minimum or maximum amounts. Or you can just set a flat fee and keep it really simple.

- **The actual permits and licenses that are issued.**
  These documents can be issued electronically through the site. The document builder allows you to include your logo, information collected from the form, and more. Each document also includes a QR code that links directly to the permit information online.

Inspections
Put together a list of the different types of inspections and their checklists/questionnaires.
In many cases, in order to issue a permit, an inspection must be completed. You'll be able to create different types of inspections (Final, Fire Alarm, etc.) and add them as steps in the approval process (what we call a workflow)

Determine which are required for each application type.
You'll be able to assign them (as many as you have) to the workflows.

Logistics
What is the process for reviewing and approving permits?
After the application is submitted, what happens next? Make a list of the steps for each application– such as Application Review, Permit Fee, Building Review, Inspection, Permit Issued, etc. This will help build your workflows.

Who needs to be involved with each application?
Think of both the specific people and the departments that are involved in the process. You can give access to as many people as needed (Users) and also control their privilege/access levels. You can also create Groups in order to assign certain workflow steps to more than one person, specific department, etc.

Next Steps.

Use the Info Gathering worksheet to keep organized. It will help streamline the process for creating your permit applications and workflows, but you can also use it as a checklist and monitor your progress as you work.

With the Info Gathering worksheet, you can:
• Determine Categories and Record Types
• Outline the processes for each application type
• Organize your users, access levels, and groupings