

# APPLICANT QUICK GUIDE



This document is a high-level quick reference guide. It is not intended to replace training or provide in-depth instruction.

Access to ProjectDox: <https://margate-fl-us.avolvecloud.com/Portal/>

Logging into ProjectDox (first time)

Welcome to the City of Margate, FL Online Application System

**Login**

E-mail:

Password:

Manage profile [?](#)

**Login**

[Forgot password?](#)

You need an account to submit and manage applications. Don't have an account?

**Create Account**

Click on **Create Account**

**Create Your Account** [?](#)

First Name \*

Last Name \*

Email \*

Confirm Email \*

Phone \*  X

Additional Phone  X

Company Name

Address 1 \*

Address 2

Country \* United States

Province/State \*

City \*

Postal Code/Zip Code \*

New Password \*

>Password must not contain special characters, must contain at least one digit, one upper case letter, one lower case letter, and must have at least 8 but no more than 10 characters.

Confirm Password \*

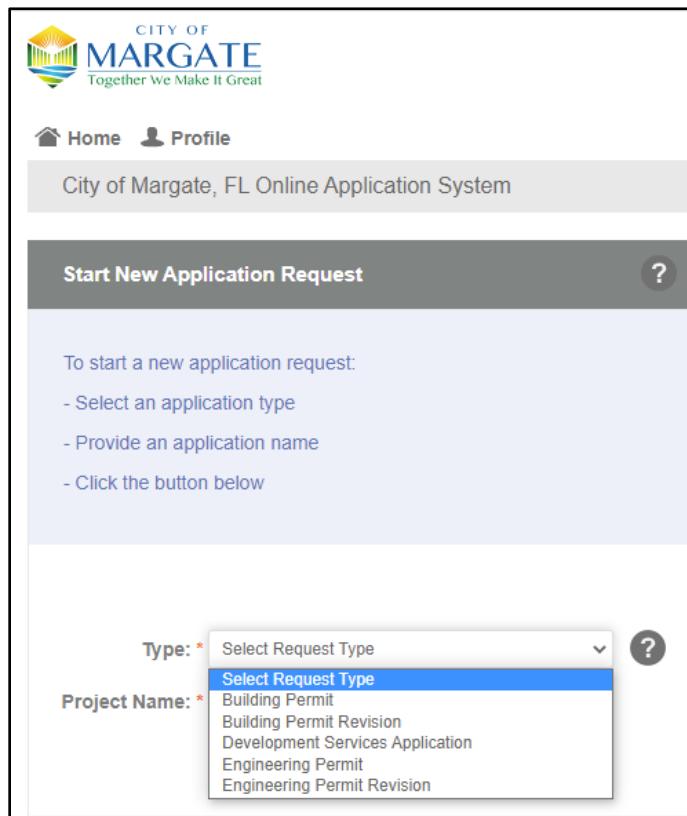
**Create My Account** **Cancel**

Complete the required information (\*) to create your account

# APPLICANT QUICK GUIDE

## Application Process

Select Permit Type by choosing from the drop down list:



To start a new application request:

- Select an application type
- Provide an application name
- Click the button below

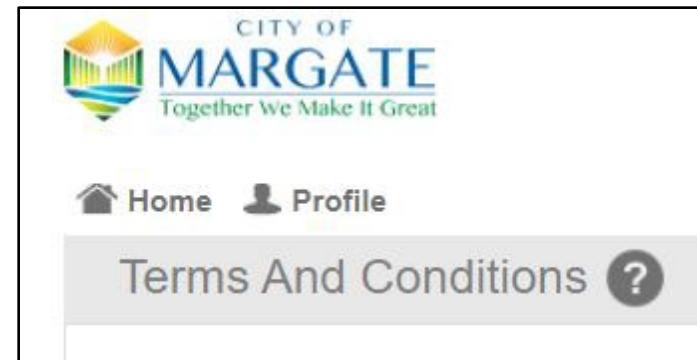
Type: \*

Project Name: \*

Enter a unique Project Name, limited to 100 characters.

Click Start Application Process

**Start Application Process**



Terms And Conditions

The next screen will take you to the Terms and Conditions.

Please carefully read all the terms and conditions.

If you accept them, check the box next to "I have read, understand, and agree to the above terms and conditions" and click the button "Accept & Start My Application":

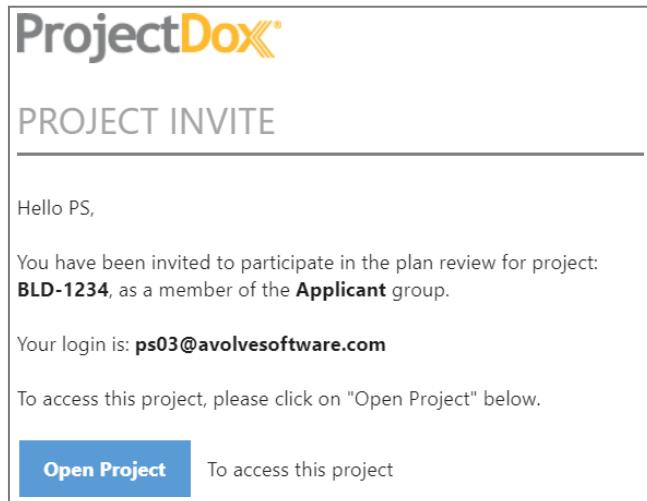
I have read, understand, and agree to the above terms and conditions

**Accept & Start My Application** [Back To My Home Page](#)

Complete all required fields within the application, which are indicated with a red asterisks (\*)

# APPLICANT QUICK GUIDE

If invited to an existing project, you will receive an email notification containing a link to the project.



**ProjectDox®**

**PROJECT INVITE**

Hello PS,

You have been invited to participate in the plan review for project: **BLD-1234**, as a member of the **Applicant** group.

Your login is: **ps03@avolvesoftware.com**

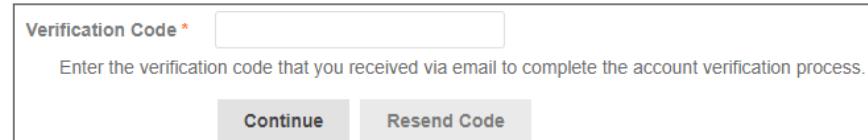
To access this project, please click on "Open Project" below.

**Open Project** To access this project

*If this is your first time logging in, you will receive an additional email with a verification code that is required to set up your account.*

## Initial Login to ProjectDox

Click the **Login** button and enter the Verification Code from the email. Click **Continue**.

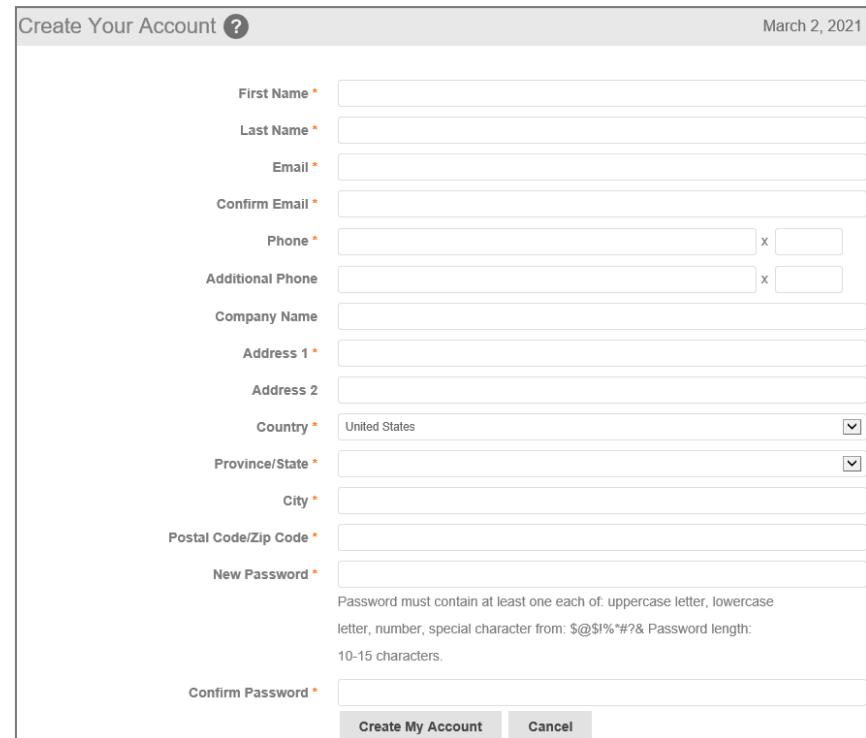


**Verification Code \***

Enter the verification code that you received via email to complete the account verification process.

**Continue** **Resend Code**

Fill in the required information, including your new password. Click **Create My Account**.



**Create Your Account** ? March 2, 2021

First Name \*

Last Name \*

Email \*

Confirm Email \*

Phone \*  X

Additional Phone  X

Company Name

Address 1 \*

Address 2

Country \*  United States

Province/State \*

City \*

Postal Code/Zip Code \*

New Password \*   
Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@#\$%^#%. Password length: 10-15 characters.

Confirm Password \*

**Create My Account** **Cancel**

# APPLICANT QUICK GUIDE



## Key Concepts You Need to Know

**Workflow:** Sequential set of business activities starting from Upload and Submit to downloading the approved plans.

**Task:** An assignment in the workflow process.

**eForm:** Online electronic form designed to capture, validate, and submit data.

**Accepting a Task:** Accepting a task is an important part of the electronic plan review process. Accepting a task provides access to that task's eForm. The user who accepts the task is responsible for completing the associated actions, including uploading files and making necessary corrections requested by the City.

**Completing a Task:** The completion of a task confirms the fulfillment of the requested actions. Completing a task is the only way the City will receive notification that you are finished. Once a task is complete no further work may be done until another task is received and accepted.

## Upload and Submit

You will receive an email with a link to start your Upload and Submit task. Click **Start Task** within the email to open the ProjectDox login screen in your browser. Once logged in, your task eForm will open.

You can also accept the task and open the eForm by clicking on **Accept** or the Upload and Submit link on the Home Page Tasks tab.

ACTION	TASK
<input type="button" value="Accept"/>	<input type="button" value="Upload and Submit"/>

Review the submittal requirements as outlined by the City and upload to the appropriate folder(s).

# APPLICANT QUICK GUIDE



## Step 1: Upload your files.

**STEP 1 of 3:**

\* Drawings: **MUST** be uploaded single-page/ landscape orientation with correct Naming Convention to "Drawings" folder.  
Maximum document size 24x36  
\* Documents **MUST** be uploaded with the correct Naming Convention to "Supporting Documents" folder

File Upload for: ENG-1042 [?](#)

Please click appropriately for the **type of files** you are uploading. [Watch video](#)

[Upload Drawings \(Plans, Surveys\)](#) [Upload Supporting Documents](#) [Upload Permit Applications,Contracts](#)

Uploaded files:

Select folder to open file list.

- Applicant User Guide (2 - 0 New) [?](#)
- Drawings (Plans, Surveys)
- Supporting Documents
- Permit Applications,Contracts

Click Browse for **Files** or drag files into the upload window. Click **Start Upload**. This step may be repeated to add additional files.



## Step 2: Confirm you have uploaded all required documents.

**STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit

**Confirmation** [?](#)

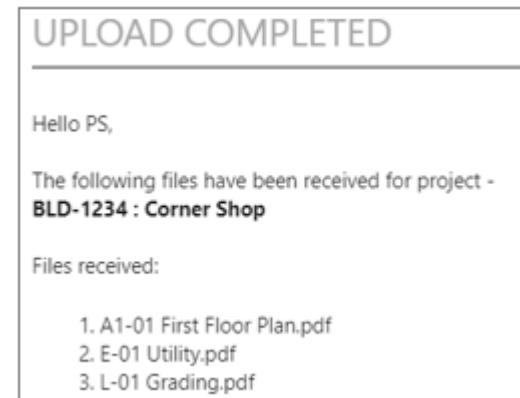
\*Upload Task Complete (I have uploaded all required documents) \*Required

## Step 3: Complete your task by clicking Submit.

**STEP 3 of 3:** Click the "Submit" button below to complete your task

[Submit](#) [Close](#)

Receipt of your upload will be confirmed by email.



# APPLICANT QUICK GUIDE



## Prescreen Corrections

If corrections are needed, you will receive an email notification for the Prescreen Corrections task. Click **Start Task** from your email or login to ProjectDox and accept the task.

**PRESCREEN CORRECTIONS**

Hello PS,

You have a task to complete to continue your plan review.

Unfortunately, your uploaded files submission has not met prescreen acceptance requirements.

**TIP: Getting through Prescreen**  
Please review all submission requirements and use "Add Comment" in Discuss Prescreen if you have any questions or comments.

To review and resubmit, please click on "Start Task" below.

**Start Task** To submit your updates for **BLD-1234 : Corner Shop**

**Step 1: Respond to comments provided by City staff.** A summary of the number of comments will be listed. Click **Review Comments**.

**STEP 1 of 4:** Respond to any comments, as needed

**Resolve Review Comments** [?](#)

Unresolved Comments: 1  
Info Only Comments: 0  
Files with Markups: 0

Plan Review: **Review Comments**

Review and respond to the comments.

Add Comment / Ask Question			<b>Please enter your responses</b> <a href="#">?</a>
Ref.# 1	Coordinator Preeti Schatzman	3/9/21 5:27 PM	Type your response here.
Unresolved	Your submission is missing storm water files.		
Comment			

After making the requested corrections, type your response in the text field box. To ask a question click **Add Comment/Ask Question**. It may be required to respond to all comments.

**Step 2: Upload New or Versioned Files.**

- If there are New Files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
  - If Yes, follow the same procedures as initial upload
  - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

**Versioned Files** **New Files**

Are your updated files named exactly the **same\*** as the prior versions?  Yes  No [Learn how](#)

\* "name-v2.pdf" is not an "exact" file name match to "name.pdf"

Please click appropriately for the type of files you are uploading. [Learn how](#)

**Upload Drawings** **Upload Documents**

# APPLICANT QUICK GUIDE

Step 3 and 4: Confirm all requirements have been met and click Submit.

<b>STEP 3 of 4:</b> Check all to confirm you have completed this task and are now ready to submit
Confirmation <a href="#">?</a>
<input type="checkbox"/> **Responses provided for all comments, additional files (if requested) have been uploaded, and any outstanding items have been addressed. *Required
<b>STEP 4 of 4:</b> Click the "Submit" button below to complete your task
<input type="button" value="Submit"/> <input type="button" value="Close"/>

*Note: If all review comments require a response and they have not been provided, you will see the following notification and will not be able to complete your task until required responses have been entered.*

**Before completing this task, you must provide a response to all applicable comments by clicking the review comments button.**

*The Prescreen Corrections task can be repeated as many times as necessary until all corrections have been submitted. You will receive an email when your Prescreen review is accepted and review is beginning.*

## Respond and Resubmit (Corrections Required)

After all required departments have reviewed your plans, you will receive an email with instructions for your Respond and Resubmit task. Click on **Start Task** in the email or Accept the task in ProjectDox.

There are several steps to complete on the eForm, as described below:

### Step 1: Resolving Review Comments.

- Click on the **Review Comments** button on the eForm in order to access the Review Comments window

**Resolve Review Comments** [?](#)

Unresolved Comments: 1  
Info Only Comments: 1  
Files with Markups: 1

**Plan Review** **Review Comments** **Export to Excel** **Import Excel Responses**

Review and respond online. Review and respond in Excel, then upload your responses.

- View the reviewer comments and markups
- Click on file name to open the drawing with markups

Add Comment / Ask Question						Please enter your responses <a href="#">?</a>	
Ref.#	Comment	Type	Reviewer	Date	Cycle	Action	
2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1	<input type="button" value="Type your response here."/>	
	<b>Unresolved</b>		A1-01 First Floor Plan.pdf			<input type="button" value="Download"/>	
	Markup	Door is too close to mechanical equipment					
3	Mechanical	Preeti Schatzman	3/10/21 4:47 PM	Cycle 1	No response required.		
	<b>Info Only</b>	Make sure to do the following when re-submitting:					
	Comment	<ul style="list-style-type: none"><li>Item A</li><li>Item B</li><li>Item C</li></ul>					

- Add your response in the Applicant Response column

Add Comment / Ask Question						Please enter your responses <a href="#">?</a>	
Ref.#	Comment	Type	Reviewer	Date	Cycle	Action	
2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1	<input type="button" value="I have made changes and uploaded a new file"/>	
	<b>Unresolved</b>		A1-01 First Floor Plan.pdf			<input type="button" value="Download"/>	
	Markup	Door is too close to mechanical equipment					

# APPLICANT QUICK GUIDE



## Step 2: Upload New or Versioned Files.

- If there are new files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
  - If Yes, follow the same procedures as Upload and Submit
  - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

Versioned Files    New Files

Are your updated files named exactly the same\* as the prior versions?   [Learn how](#)

\* "name-v2.pdf" is not an "exact" file name match to "name.pdf"

Please click appropriately for the type of files you are uploading. [Learn how](#)

## Step 3: Mark the task complete and click Submit.

**STEP 3 of 4:** Check all to confirm you have completed this task and are now ready to submit

Confirmation [?](#)

\*I have responded to all review comments \*Required

\*I have uploaded my revised files, if requested \*Required

If your resubmittal needs corrections, you will receive an email and task with required actions necessary before the subsequent review can begin.

## Final Payment

Once approved, you will receive an email notification and task for any fees due. It is your responsibility to pay all final fees per the City's guidelines.

Mark the task complete and click **Submit**.

### Confirmation [?](#)

\*All fees have been paid \*Required

# APPLICANT QUICK GUIDE



## Congratulations! Approved Plans Ready for Download

You will receive an email notification directing you to download and save your approved plans.

The email contains the following text:

Hello PS,

**Congratulations**, your approved plans are ready for download.

To download your approved files, click on "Download" below. You will be redirected to your Project portal and you will enter your login & password. Once logged in, a window will open prompting you to select a location on your local computer to download and save your approved plans.

**Download** To access your approved plans for **BLD-1234 : Corner Shop**

*Please do not reply to this email.*

REMINDER: The Online Help for ProjectDox is available here:

