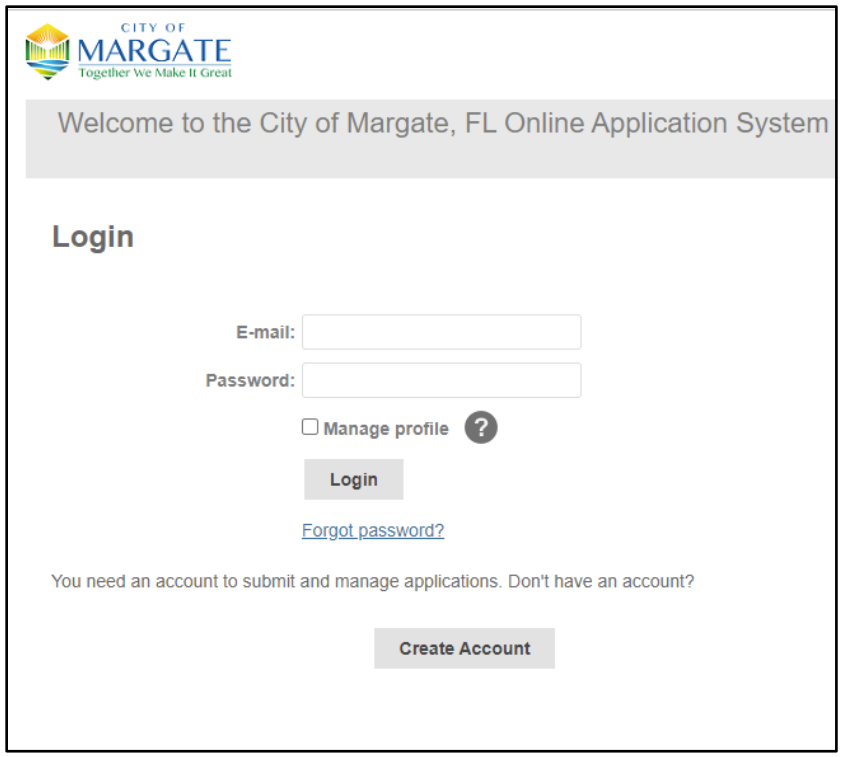
APPLICANT QUICK GUIDE

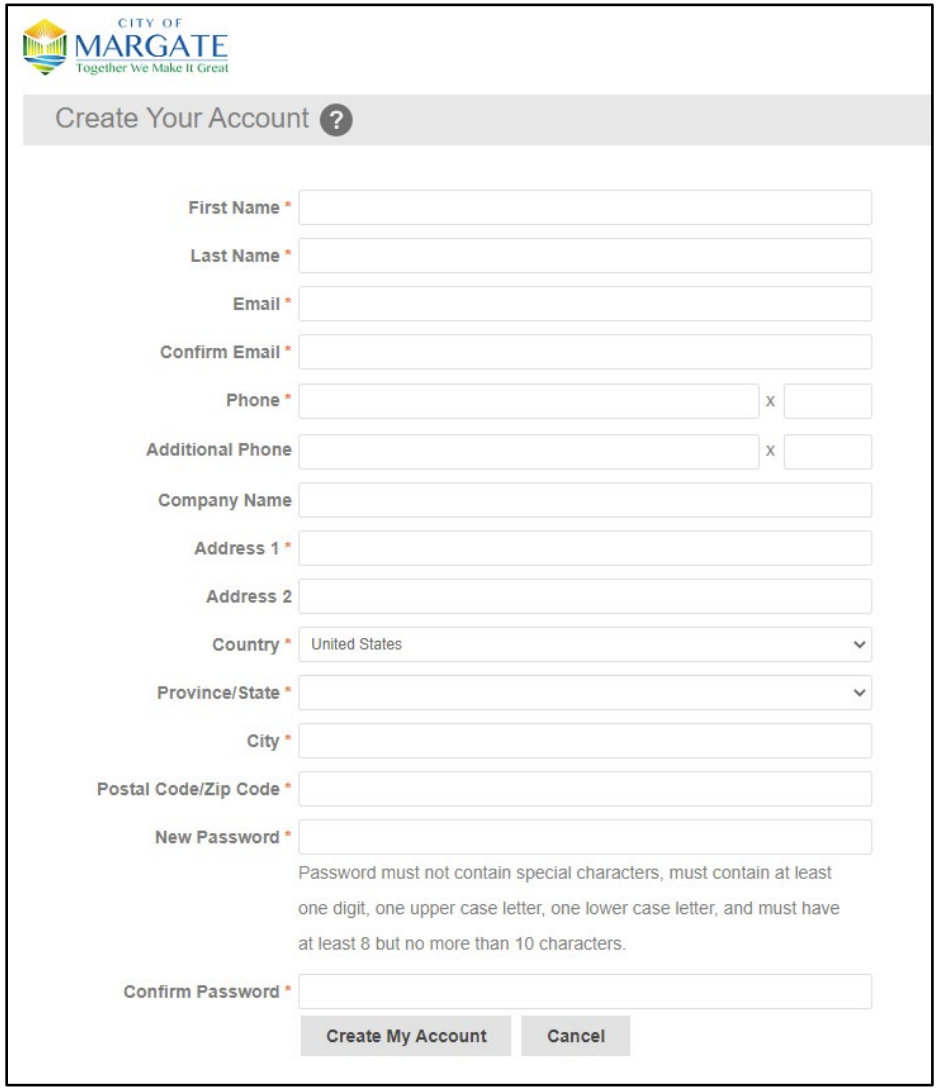
This document is a high-level quick reference guide. It is not intended to replace training or provide in-depth instruction.

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

Logging into ProjectDox (first time)



Click on **Create Account**



Complete the required information (*) to create your account

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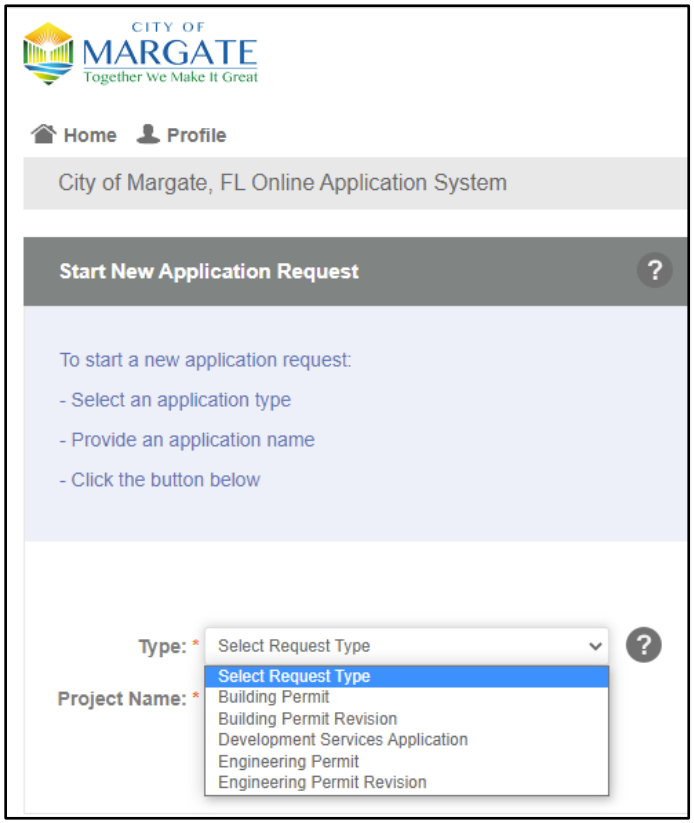
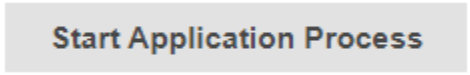
Application Process

Select Permit Type by choosing from the drop down list:



Enter a unique Project Name, limited to 100 characters.

Click Start Application Process



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”:

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

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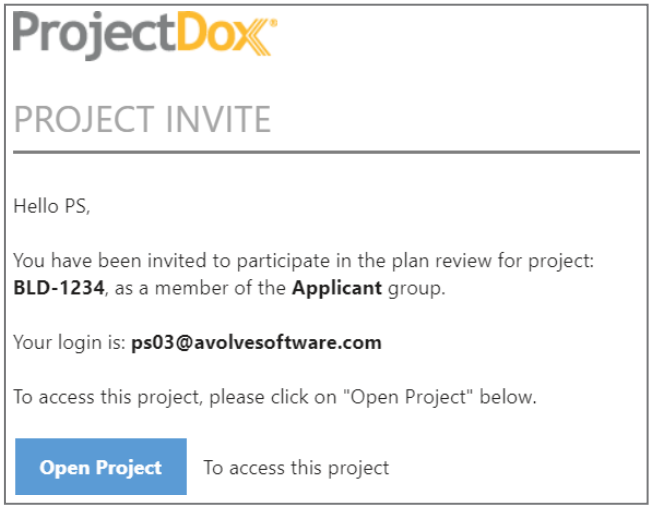
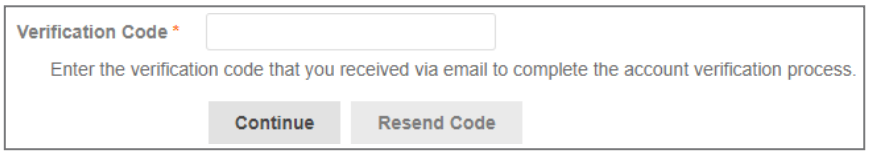
If invited to an existing project, you will receive an email notification containing a link to the project.



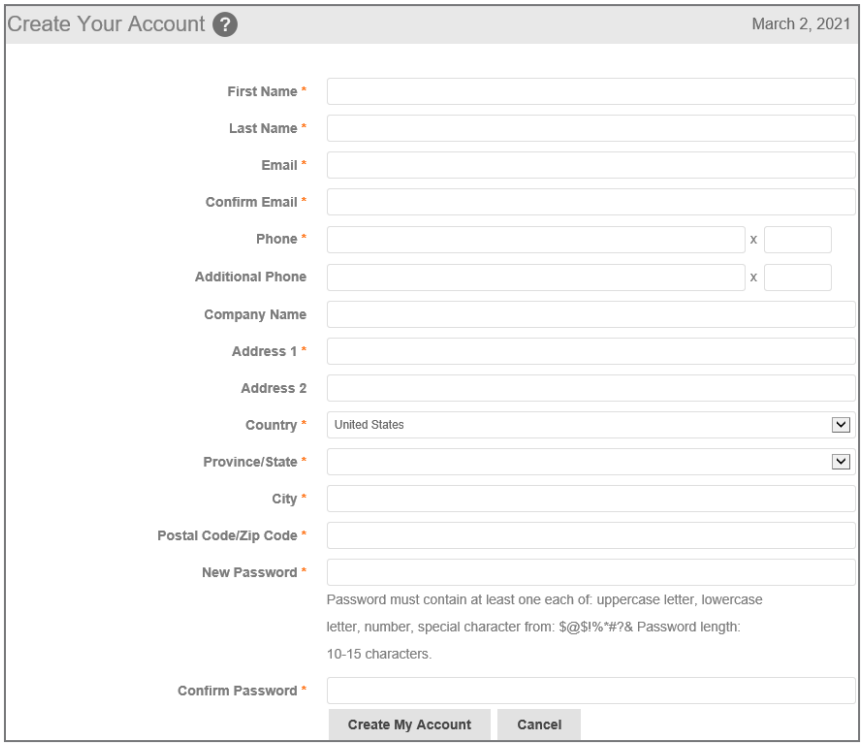
If this is your first time logging in, you will receive an additional email with a verification code that is required to set up your account.

Initial Login to ProjectDox

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



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



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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.

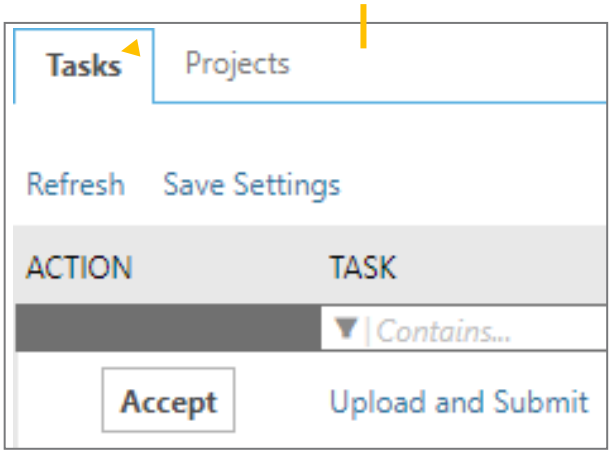
Accepting a Task: Accepting a task is an important part of the electronic plan review process. Accepting a task provides access to that task's eForm. The user who accepts the task is responsible for completing the associated actions, including uploading files and making necessary corrections requested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



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

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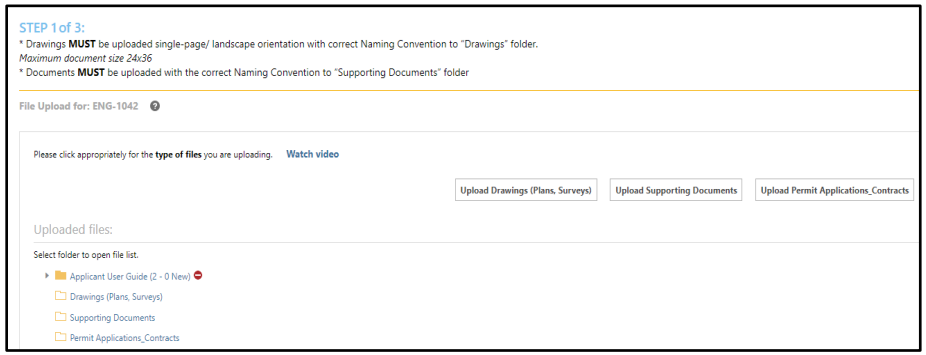
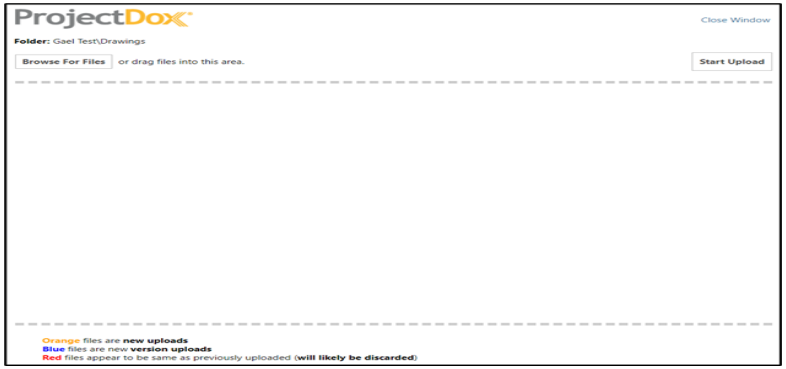
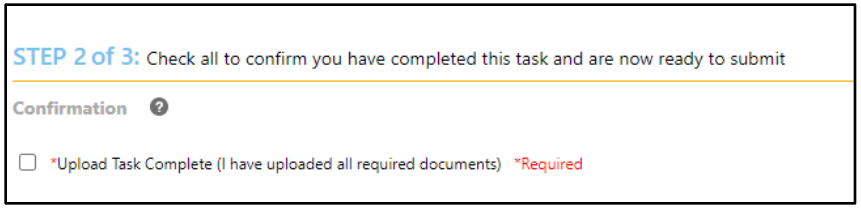
Step 1: Upload your files.



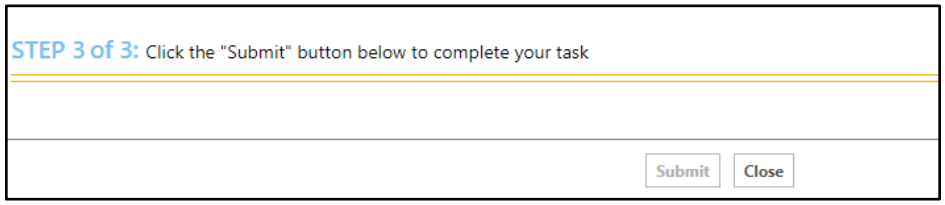
Click Browse for **Files** or drag files into the upload window. Click **Start Upload**. This step may be repeated to add additional files.



Step 2: Confirm you have uploaded all required documents.



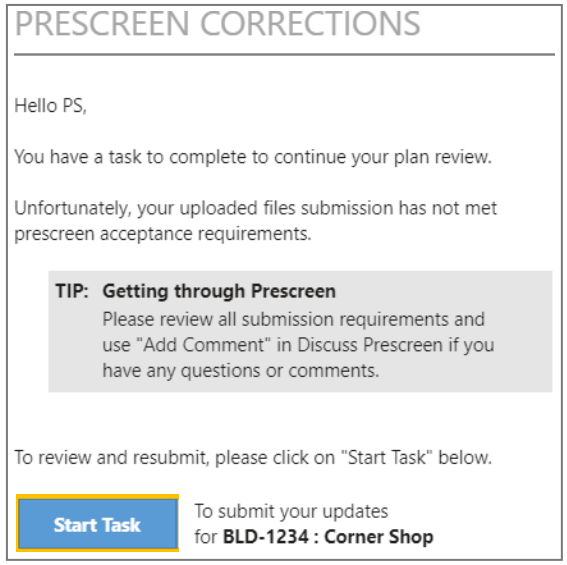
Step 3: Complete your task by clicking Submit.



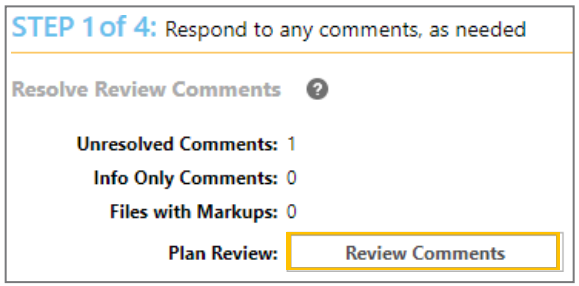
Receipt of your upload will be confirmed by email.

Prescreen Corrections

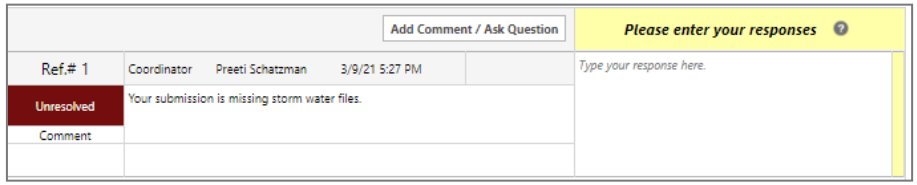
If corrections are needed, you will receive an email notification for the Prescreen Corrections task. Click **Start Task** from your email or login to ProjectDox and accept the task.



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



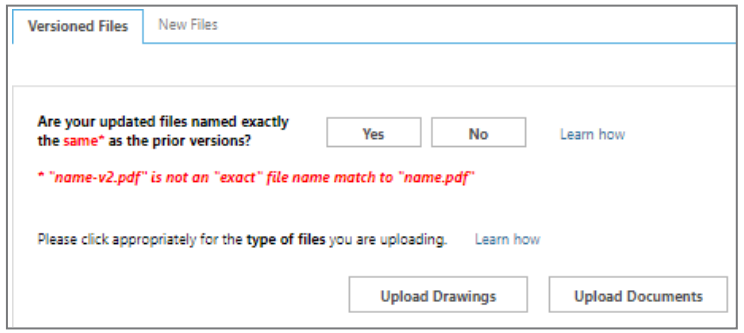
Review and respond to the comments.



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



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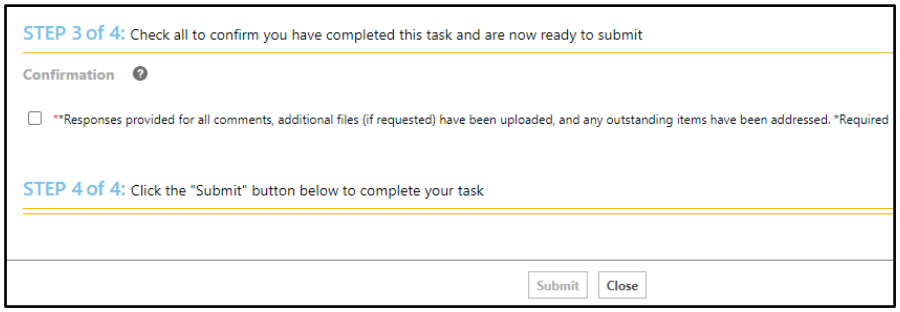
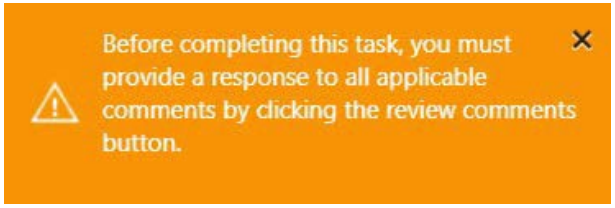
Step 3 and 4: Confirm all requirements have been met and click Submit.



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.



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.*

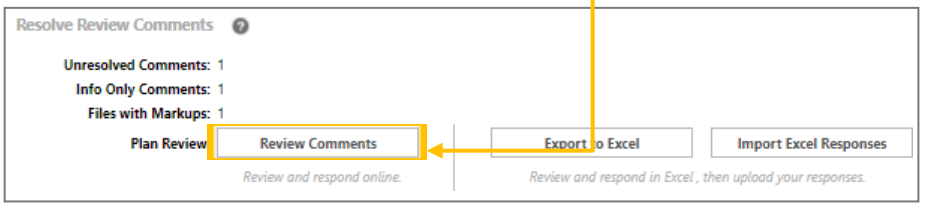
Respond and Resubmit (Corrections Required)

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.

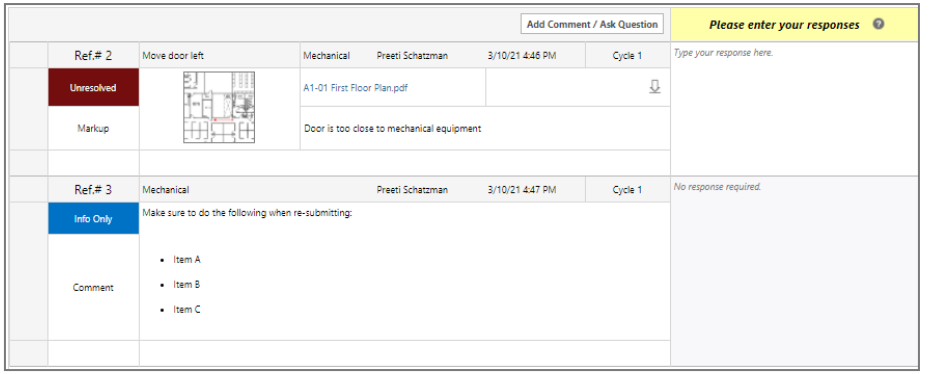
There are several steps to complete on the eForm, as described below:

Step 1: Resolving Review Comments.

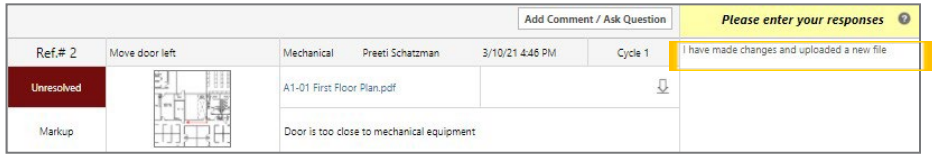
- Click on the **Review Comments** button on the eForm in order to access the Review Comments window



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

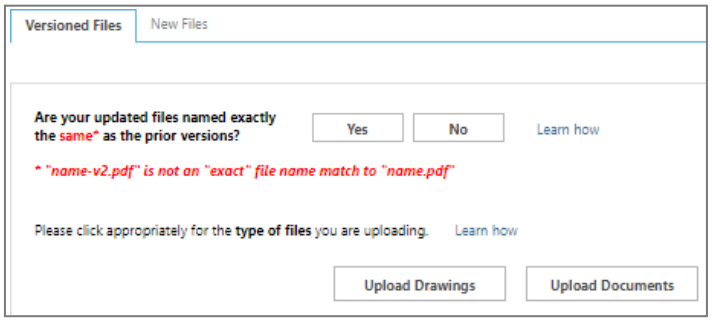


- Add your response in the Applicant Response column

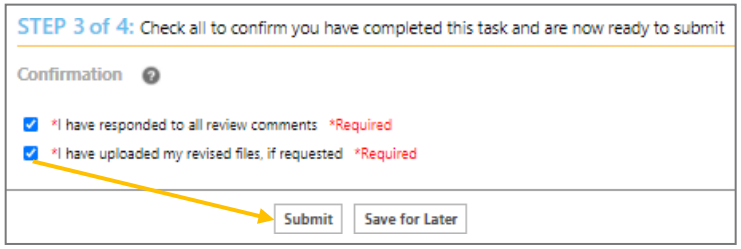


Step 2: Upload New or Versioned Files.

- 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



Step 3: Mark the task complete and click Submit.

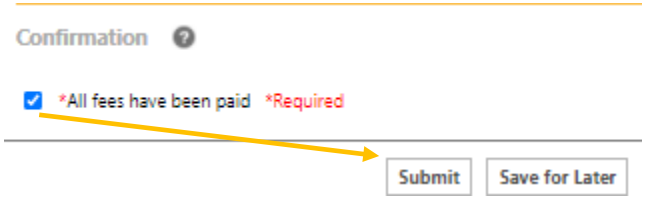


If your resubmittal needs corrections, you will receive an email and task with required actions necessary before the subsequent review can begin.

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**.



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Congratulations! Approved Plans Ready for Download

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

ProjectDox

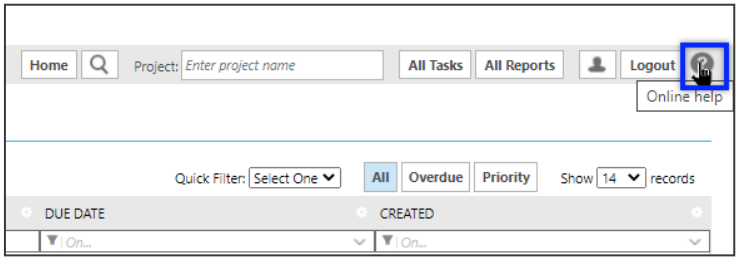
DOWNLOAD APPROVED FILES

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: