

Cloudpermit 

**Pricing Proposal**

# Cloudpermit

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

# Proposal

**Proposal #:** Q-02176-1  
**Customer #:** CUST-0007953  
**Date:** 1/29/2024  
**Expires On:** 2/25/2024  
**Sales Person:** Frank Ficaró  
**Sales Person Email:** frank.ficaró@cloudpermit.com  
**Delivery Method:** E-Mail

**Ship To**  
Matthew Carlile  
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Catskill, New York 12414  
United States  
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mcarlile@townofcatskillny.gov

**Bill To**  
Catskill  
439 Main Street  
Catskill, New York 12414  
United States

## Subscription

Product Name		Year 1	Year 2	Year 3	Year 4	Year 5
Building	Total	USD 5,000	USD 5,000	USD 5,000	USD 5,000	USD 5,000
Code Enforcement	Total	USD 1,000	USD 1,000	USD 1,000	USD 1,000	USD 1,000
Licensing and Registration	Total	USD 1,000	USD 1,000	USD 1,000	USD 1,000	USD 1,000
Planning	Total	USD 2,750	USD 2,750	USD 2,750	USD 2,750	USD 2,750
<b>Subscription Total:</b>		USD 9,750	USD 9,750	USD 9,750	USD 9,750	USD 9,750

## Service

Description	Total
Data Import	USD 2,000
Implementation Fee - Building Software Solution	USD 2,000
Implementation Fee - Code Enforcement Software Solution	USD 1,000
Implementation Fee - Licensing and Registration Software Solution	USD 1,000
Implementation Fee - Planning Software Solution	USD 2,000
<b>Service Total:</b>	USD 8,000

**Customer Total First Year:** **USD 17,750**

## Terms & Conditions

Validity of this quote: 30 days from date of creation  
Term: 5 years, billable annually  
Payment Term: Net 30 days from Invoice Date  
Invoicing: Subscription invoice to be sent after contract is signed and then annually.  
Implementation payments: 50% due upon implementation start (M1) and 50% due after implementation is complete (M2).  
All stated prices are exclusive of any taxes.

## Annual Subscription Fee

Cloudpermit's software licensing model is different from most vendors because it is designed to reflect the needs, convenience, and business realities of small and mid-sized local governments.

The annual fee includes everything the client needs to operate and maintain the software on an ongoing basis. There are no hidden fees and no cost for newly developed features in each module.

### Included in the Annual Subscription Fee:

- ✔ Unlimited user licenses for municipal staff
- ✔ Access to all software features (including mobile features)
- ✔ Unlimited data storage
- ✔ Online portal for public users to submit online
- ✔ Core integrations (GIS, Online Payments)
- ✔ Support and maintenance (described below)

## Implementation and Training

### Implementation

Cloudpermit is an out-of-the-box SaaS solution purpose-built for local government building departments. The implementation process is standardized, while considering the specific and unique needs of each client. Implementation typically takes between 4-8 weeks. Little to no IT support is required from the client.

### Training

Cloudpermit provides training for end-users and administrative users throughout the implementation of the software. Training takes between 4-6 hours and is done in the client's uniquely configured environment.

## Maintenance and Support

### Maintenance

Maintenance is included with the annual subscription fee. Cloudpermit updates the software every 3-4 weeks, for a minimum of 12 updates per year. Updates are managed by Cloudpermit's development team, requiring no effort from the client's end-users or IT staff. Updates are hot-patched, meaning there is no system downtime for end-users.

Cloudpermit's release notes are public and available at the following link:

<https://support.cloudpermit.com/support/solutions/67000379501>

### Support

Support is included with the annual subscription fee for each solution.

### Cloudpermit provides the following support resources:

- ✔ Phone-in help desk support – Available from 7:30AM-8:30PM EST Monday-Friday
- ✔ Industry standard support ticketing portal for clients
- ✔ Self-help portal for municipal end-users, as well as public applicants (builders/developers)

Cloudpermit's support portal is updated in line with monthly releases, and is available to the public at the following link:

<https://support.cloudpermit.com/support/home>



## Implementation Timeline

The implementation schedule is mutually agreed upon before the kickoff meeting and documented with a project plan.

Check out our standard implementation schedule 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																			
Code Enforcement					4-5 weeks															
Planning Department										8-10 weeks										

## Implementation Model

Both Cloudpermit's team and the customer are responsible for performing tasks during the implementation process.

### Kickoff:

The kickoff meeting starts the implementation process. Your designated Implementation Specialist, your staff, and key stakeholders meet to review an overview of the software, discuss goals and objectives, schedule, and plan for a successful implementation.

### Workshop:

The workshop ensures that the Implementation Specialist has a clear understanding of the business processes, details that government staff needs to collect from the applicant, fee schedules, payment providers, any needed integrations and costs, and any needed templates.

### Configuration:

The software is configured with the features and functionalities the customer needs.



Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, business licensing, planning & zoning, and code enforcement.



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# Cloudpermit Implementation Model



## Training & Testing:

The customer will meet with their Implementation Specialist for two standard training sessions. Additional Training: Most customers feel prepared to start using Cloudpermit at the end of their training sessions. Sometimes, additional training is necessary. In this case, customers can order additional training for an additional cost.

## Go-Live:

The go-live includes a go/no go decision prior to a scheduled go-live meeting where the training environment goes to production. At the go-live meeting, the customer will submit their first building permit, application, or create their first case within Cloudpermit.

## Milestones & Acceptance Criteria:

Milestones are used to accept that you have completed a step in the implementation process. As each milestone is completed, the customer receives and must sign a Milestone Acceptance Document to agree the milestone has been reached.

If there are any go-live blockers or corrections needed, customers must inform Cloudpermit's team.

## Change Management:

If additional needs are identified during the implementation process that are outside of the project scope, a change request is made.

## Additional Services Cost

Cloudpermit can provide additional services as per the price list with a change order.

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

Let us know if you have any questions and we're looking forward to working with you.

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# Cloudpermit Data Import

March 2023

Cloudpermit 

## 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	Worksfa	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



## Where is the data stored?

All data is stored in the US and hosted on Google Cloud Services.

## How is data stored securely?

Triple redundant co-location is in place with three geographically separate data centers. All data is encrypted both in transit and at rest.

## How often are passwords reset?

Minimum password strength requirements are in place for all users, and passwords must be reset every 6 months.

## How often are backups done?

System backups are done hourly.

## What is Cloudpermit uptime guarantee?

Cloudpermit guarantees 99.99% uptime annually.

## Who owns the data?

The client owns their data, Cloudpermit merely hosts it.

## Is there a limit to the amount of data storage?

There is no data storage limit.

## What are the benefits of Cloudpermit's security?

Cloudpermit's security measures ensure that client data is stored safely, and accessibility is maintained at all times.

## Can I view more information about Cloudpermit's security protocols?

Yes, you can visit our [website](#) for more information on our security measures.

## Are there any known security issues with Cloudpermit's system?

No, Cloudpermit's security system is regularly updated to prevent any security breaches.



Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, business licensing, planning & zoning, and code enforcement.



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# Our Solutions

Building Permitting and Licensing  
Software Made Simple



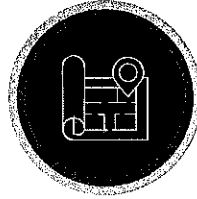
## Building Permitting

Use government permitting software to provide better citizen service, organize your building permits, and accept complete applications.



## Business Licensing

Enjoy business license software that lets your team issue and renew business licenses, access property information, and use interactive maps.



## Planning & Zoning

Take advantage of planning and zoning software to issue land use permits and achieve greater land management.



## Code Enforcement

Benefit from code enforcement management software that allows code compliance officers to accept complaints online, view case history in chronological order, and communicate with direct and group messages.

Don't take our word for it...

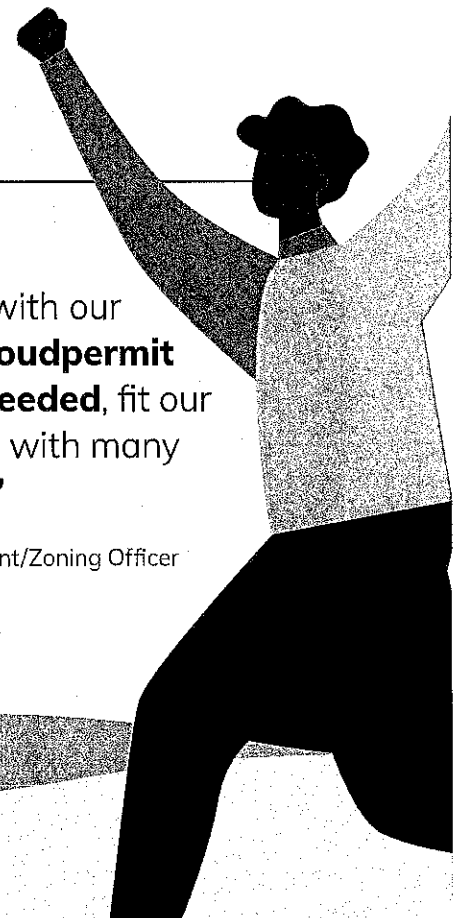
# Listen to our partners

“Every part of **my Cloudpermit journey has been easy** and everything that I was promised in the sales process has been delivered.”

Julie Wicker, Clerk for the Town of Wilson, Wisconsin

“We were confident with our decision because **Cloudpermit offered what we needed**, fit our budget, and worked with many other governments.”

John Snelson, Code Enforcement/Zoning Officer for White Oak Borough



“Our Customer Success Manager was amazing at walking us through the software and went above and beyond our expectations. He ensured we had the necessary tools for success, answered our questions, and gave us the confidence to explore new things. **The excellent customer service we received during implementation enabled us to provide excellent service to our citizens.**”

Henry Hemphill, City Planner for the City of Fruita



**850+**

Customers

**19M**

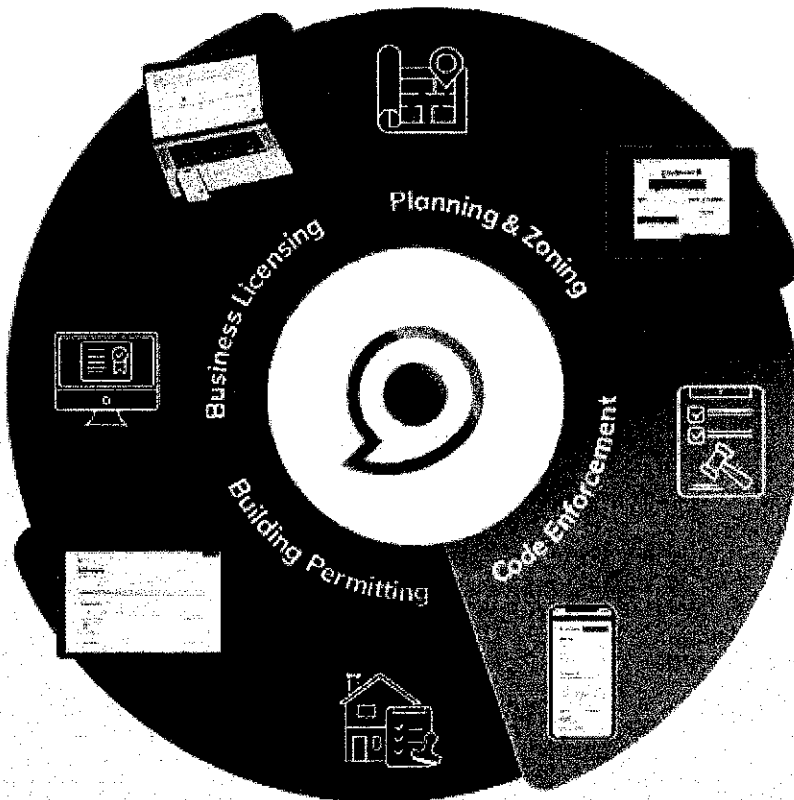
Inspections

**18M**

Building Permits

**45M**

Citizens



Enjoy community development software that was designed with **governments and agencies just like yours.**



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## Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

## Accept, Review, and Issue Building Permits

Work online to receive and issue building permit applications with ease and without paper.

## Receive Complete Building Permit Applications

Force citizens to complete applications before they can click 'submit' with mandatory input fields.

## Conduct On-site Mobile Building Inspections

Manage all data, contact information, drawings, reports, etc., in the field by starting and finishing building inspections on-site.

## Use Maps Integrated with Your GIS

Select building permit locations, view detailed property information and plan optimal inspection routes.

## Change and Modify Workflows

Select building permit types from a pre-configured structure, and manage requirements, including forms, drawings, reviews, and inspections for each type of application.

## Gain Insight with Reports

Create reports, such as for permits, assessments, payments, inspections, reviews, etc.

## Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

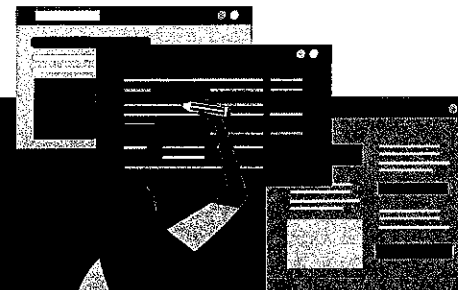
## Keep All Communication in One Place

Send direct and group time-stamped messages for organized conversations.

## Get Up and Running Quickly

Start using Cloudpermit within weeks without costly integrations or IT support.

Cloudpermit provides community development software. We offer simple and online software solutions for building permitting, planning & zoning, and code enforcement.



## Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

## Accept Complaints from Citizens

Accept complaints and determine what contact information is required for complainants.

## Create Cases and Violations in the Field

Work in the field and search past building permits, previous complaints, cases, and history of a property.

## Conduct On-site Inspections

Input notes and complete reports in the field on any mobile device.

## View Case History in Chronological Order

Access data, contact information, reports, photos, etc., in chronological order.

## Share Photos

Upload photos to cases, violations, and inspections.

## Use Maps Integrated with Your GIS

Select case locations, view detailed property information, plan optimal inspection routes.

## Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

## Keep All Communication in One Place

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## Use Anytime, Anywhere

Access Cloudpermit 24/7 on your phone, tablet, or laptop with any browser or operating system.

## Accept, Review, and Approve Planning Applications

Work online to receive and approve planning applications with ease and without paper.

## Manage Meeting Dates and Agendas

Keep track of meetings, manage pre-consultation requests, and generate agenda templates.

## Organize Public Notice Notifications

Manage and send public notice notifications, find public notice radius, and track public opinion.

## Circulate Planning Applications Internally and Externally

Send multiple circulation requests in real-time and receive responses without paper.

## Use Maps Integrated with Your GIS

Retrieve detailed and accurate property information, including various layers such as flooding maps and heritage areas.

## Change and Modify Workflows

Select application types from a pre-configured structure, and manage requirements, including forms, drawings, and reviews for each type of application.

## Accept Payment

Enable online and over-the-counter payments, send notifications for due payments, and determine a detailed list of fees.

## Keep All Communication in One Place

Send direct and group time-stamped messages for organized conversations.

## Get Up and Running Quickly

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## Online Portal in the Cloud

Log into Cloudpermit whenever and wherever suits you best.

- ✔ Use any mobile device via the Internet
- ✔ Benefit from storing information in the cloud
- ✔ Automatically save and protect information in real-time
- ✔ Send direct or group time-stamped messages

## License Dashboard View

Access all the information you need most often on your dashboard as soon as you log into Cloudpermit.

- ✔ Find the most recent applications
- ✔ View upcoming due dates
- ✔ Automate fee calculations
- ✔ Check business owner information
- ✔ Verify the status of an application

## GIS Integrated Maps

Seamlessly integrate your GIS for accurate and relevant location information.

- ✔ Find up-to-date property information
- ✔ Plan routes for site visits
- ✔ Separate areas into zones

## Data Import

Easily import past business licenses into Cloudpermit.

- ✔ Move existing data into a new system
- ✔ Store past business licenses online
- ✔ Keep all information in one place

## Renewal Management

Renew business licenses with ease online.

- ✔ Get notified before renewals are due
- ✔ Send automatic email notifications to business owners for renewals
- ✔ See dashboard view for upcoming renewals

## Document Management

Manage and sort documents simply and quickly with Cloudpermit.

- ✔ Manage documents for multiple business licenses
- ✔ Filter and sort relevant information

## Reporting

Take advantage of custom reports and one-click downloads to learn more about the data surrounding your business licenses.

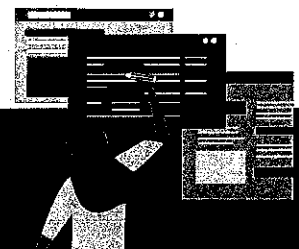
- ✔ Create reports for business license renewals
- ✔ Use templates
- ✔ Track outstanding fees
- ✔ Download reports as an Excel or CSV file

## Payment and Fee Calculations

Set up online and over-the-counter payments.

- ✔ Send notifications for due payments
- ✔ Calculate fees for business licenses
- ✔ Manage overdue fees

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