



Migrating Building Permits into the New Permits Management System—Salesforce

For the past few weeks, we have been migrating permits created in our old permits management system into Salesforce. It is a slow process as there are numerous steps to get these permits to the point where we can finish them in Salesforce. Here are some things you should know:

- We had to manually add the permit applicant information. For issued permits, we selected the contractor as the applicant, even if they weren't the actual applicant, because they are the best contact for issued permits. If the original applicant or others need to access your permit on the portal, they need to be added as contacts.

To add additional contacts:

1. Find your permit on the portal, clicking on 'Related,' and under 'Contacts,' clicking on 'New.'
 2. You must select a contact 'Type' from the dropdown list.
 3. Start typing the contact's name. Suggestions will appear under the contact field—just use the scroll bar to see the list below.
 4. Click on the contact's name. Remember, people must be registered in Salesforce in order to be a contact. You can add the contact's account if you wish, however, it's not required.
- You will not see any fees that were previously paid. We are attaching that information in the back office only.
 - The inspection list will contain all of the inspections you might request for your permit. They will be in a pending status, even ones you have already requested and passed. For those, **you don't have to request them again.** We have made a copy of all of your inspections and they have been attached to your permit in the back office. You only need to request the inspections you still need.



A Reminder About Inspections

Salesforce features three inspection stages. **You cannot proceed to the next stage of inspections before all previous inspections are completed.**

1. Initial Inspections: Rough Building and Referral Agency inspections, as appropriate, based on your project.
2. Final Inspections: Final Inspections for all Referral Agencies associated with your project.
3. Final Building Inspection: The final inspection required to be eligible for a Certificate of Occupancy or Letter of Completion.

If you don't see the inspection you want, contact the appropriate agency staff and they will create the inspection for you. For example, if you believe that you are ready for a final referral agency inspection prior to the completion of all initial inspections, please contact the appropriate agency below and ask them to create it. If you know when you want to schedule the inspection, staff can include the request date.

- Building buildingadmins@cityofaspen.com
- Engineering CMP cmphelp@cityofaspen.com
- Engineering Dev Rev engineeringhelp@cityofaspen.com
- Engineering Soils/Erosion cmphelp@cityofaspen.com
- Engineering Water cmphelp@cityofaspen.com
- HPC amy.simon@cityofaspen.com
- Parks david.radeck@cityofaspen.com
- Recycling eh@cityofaspen.com
- Sanitation chip.aspensan@outlook.com
- Water Efficient Landscaping rick.magill@cityofaspen.com
- Zoning comdevzoning@cityofaspen.com

If you have questions about Salesforce, we have created a Help page that is on the Building Department's webpage: <https://www.cityofaspen.com/1211/Salesforce-Applicant-Portal-Support>. It has answers to frequently asked questions, links to detailed instructions, and videos. If you need additional assistance, please contact SFSupport@cityofaspen.com.