

Permit Documentation – Features and Benefits

Formsite removes the clerical burden entirely, turning "granting a permit" into a single-click action rather than a 15-minute formatting exercise.

The Automated Document Workflow

1. **Approval Trigger:** Once the council officer clicks "Granted" in the Formsite dashboard, the system is triggered.
 2. **Data Extraction:** Formsite pulls all relevant data (Contractor Name, Location, Dates, Permit Type, and Specific Conditions) directly from the validated application record.
 3. **Template Generation:** The system populates a pre-formatted, brand-compliant PDF template featuring the Council's logo, specific legal wording, and standard conditions.
 4. **Automatic Delivery:** The PDF is instantly attached to a system-generated approval email and sent to the applicant.
 5. **Audit Trail:** A copy of the exact document sent is automatically archived within the Formsite record and made available for inspection by street works officers or the public.
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Key Benefits of Automated Document Production

For Highways & Admin Teams (The Operational Win)

- **Eliminate "Typing Time":** Officers no longer spend time re-keying addresses or dates into Word templates—saving roughly 10–20 minutes of administrative work per permit.
- **Branding Consistency:** Ensures every permit issued is professional, correctly branded, and contains the most up-to-date legal terms and conditions. No more "old versions" of Word docs floating around on desktop folders.
- **Instant Issuance:** The contractor receives their permit the second it's approved, meaning they can get it printed and displayed on-site immediately, avoiding delays or potential enforcement disputes.
- **Document Integrity:** Because the PDF is generated from the database, the details on the physical paper on-site are guaranteed to match the record in Formsite and Scottish Road Works Register.

- **Paperless Archiving:** Removes the need for physical filing or manual saving of "Sent" emails. The system acts as the digital filing cabinet.
- **Version Control:** If a permit is extended or amended, the system generates a new, version-controlled PDF, ensuring there is never confusion over which document is currently valid.

Sales Email Bullet Points: Professional & Instant Issuance

- **One-Click Permit Generation:** Stop the manual copy-paste. Formsite automatically generates a professional, council-branded PDF permit the moment you hit "Approve."
- **Guaranteed Data Accuracy:** By pulling data directly from the application into the document, we eliminate the risk of typos in critical fields like start dates, locations, or street names.
- **Automated Applicant Notification:** The system handles the distribution, instantly emailing the granted permit to the contractor so they can get to work without delay.
- **Standardised Legal Compliance:** Ensure 100% of your permits contain your latest standard conditions and local bylaws, with no risk of officers using outdated document templates.
- **Digital Inspection Readiness:** Every issued permit is stored against the record, allowing inspectors on the street to verify the "live" document against what they see on-site in seconds.

Comparison: The "Manual Word Doc" vs. Formsite PDF Automation

Activity	The Manual Legacy Way	The Formsite Way
Drafting	Open Word, find template, re-type info.	Zero Effort. Auto-populated from the app.
Branding	Inconsistent logos and formatting.	Fixed. High-fidelity, brand-compliant PDF.
Sending	Save as PDF, open Outlook, attach, send.	Instant. Automated system-send on approval.
Archiving	Manual filing in folders or email "Sent" box.	Built-in. Automatically saved to the case file.
Error Risk	High (typos, wrong dates, old terms).	Zero. Direct data-mapping from source.
