BluePrince Portal

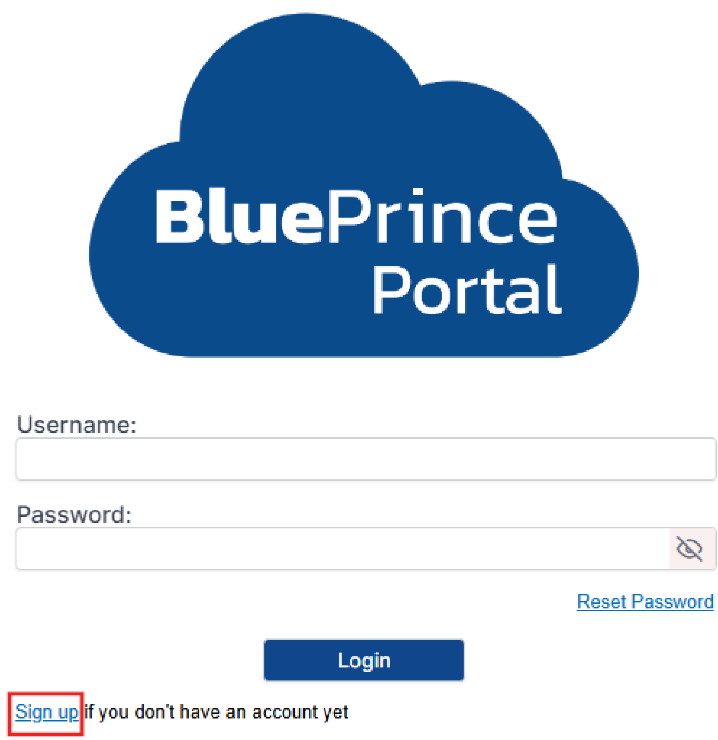
You are here: BluePrince Portal Documentation

Registering and Logging In

Last Updated: 25 March 2025

Note: If you already have an account on BuildingDepartment.com, your username and password have been migrated, so try logging in before you register.

Registering for an Account



1. **Sign up**
   - The BluePrince Portal will open to the log in screen. If you do not already have an account, select the **Sign up** link.
2. **Jurisdiction**
   - Select the jurisdiction you are working in from the drop-down menu and select it.
     - If you are working with more than one

jurisdiction that uses BluePrince, you will need an account for each. Information is not shared.

3. **Contractor Company or Homeowner**
    - Select the appropriate role for your account.
4. **Account Information**
    - You will now enter information for your account, including your username and password.
    - All starred information is required.
    - It is important that all information be factual.
        - Your email address will be used to validate your account (and to reset your password).
        - Your email address will also be used to link any related records already in the database.
        - This information will also be used to create your contact record in BluePrince.
        - This information will only be used by BluePrince and will appear on printed documents (permits, COs, etc.).
5. **Validate and Submit**
    - After filling in your information, select the Validate & Submit button.
    - You will receive a confirmation email to validate your account request. Use the link in the email.
    - Check your spam folder if you do not receive the validation email.

Logging In

- The Portal link will open the sign-in screen.
- Enter the username and password for your account.
- If you have forgotten your password, use the Reset link. A reset email link will be sent to the email you registered with.
- A successful login will take you to the Portal dashboard.
- You will have to log back in if you are inactive for a while.

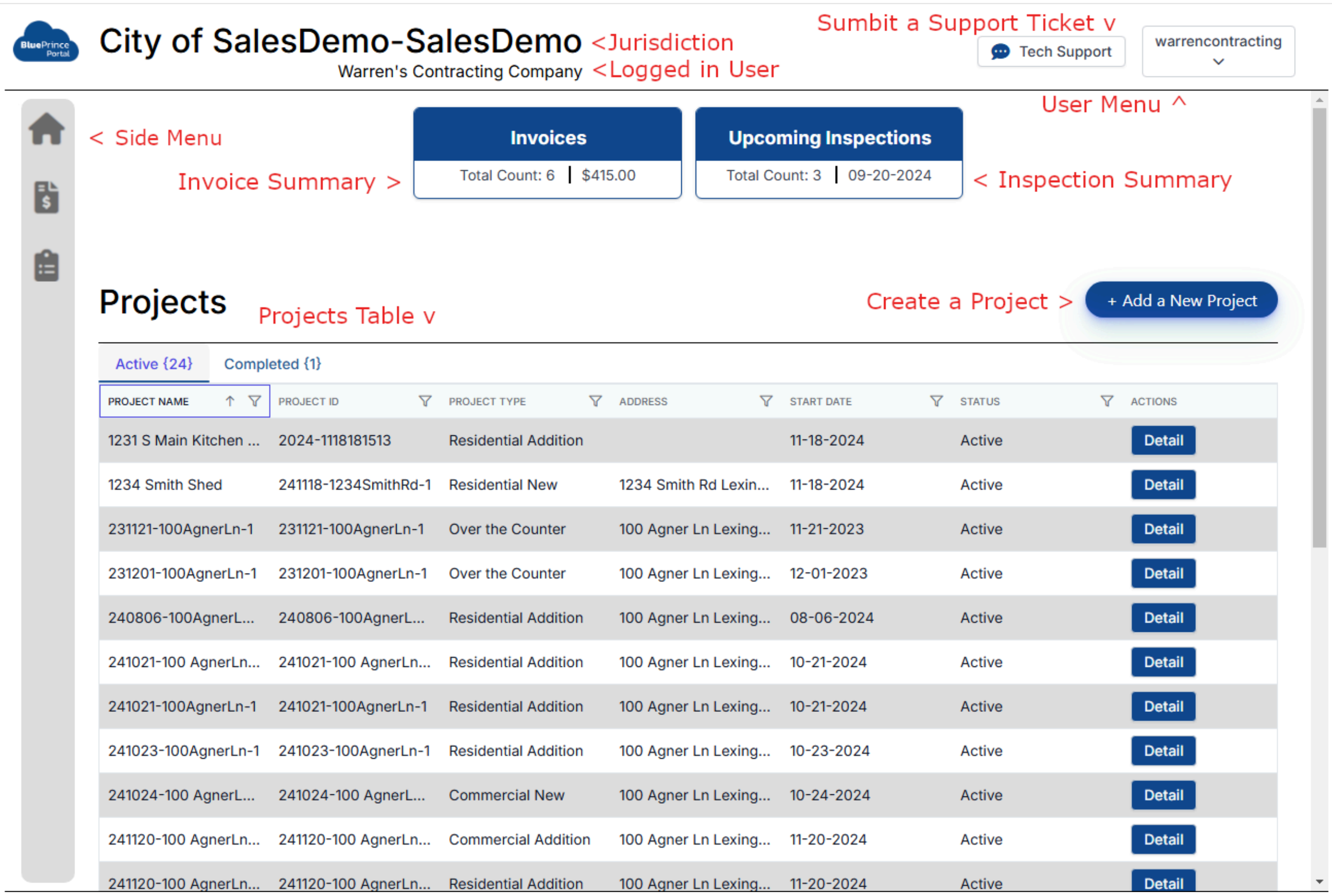
BluePrince Portal Dashboard

Last Updated: 02 April 2025

The Portal dashboard displays a summary of all of your account activity.

Elements of the Dashboard

This section will describe the elements of the Portal Dashboard.



Logo

The cloud logo links back to the dashboard. Select if from any screen to return to the dashboard. Note that changes may be lost.

Jurisdiction

This is the jurisdiction associated with the logged-in account. Only addresses within this jurisdiction can be added to applications.

Name of Logged in User

This displays who you are logged in as (name or company name).

Tech Support

This link will take you to a page where you can submit a support ticket.

User Menu

The user menu is a drop-down from your user id. Use this button to log out or to update your account information.

- **Logout**
    - This will log you out and return to the login screen. Data changes may be lost.
- **Settings**
    - **User Information** - You can update your name, address information, phone number or email. You can not change your user id.
    - **Password** - You can change your user password.
    - **Sub Accounts** - You can add sub-accounts, for example for employees or sub-contractors, that can apply for permits in your name.
        - Roles are as follows
            - Administrators sees all projects and invoices, and can access this page
            - Supervisor sees all projects and invoices
            - Billing sees only invoices
    - **Jurisdictions** - If your email address is associated with accounts in more than one jurisdiction, you can remove them here.
        - The current jurisdiction is not available for removal.
- After updating any account information, select the Update button to save the changes, then use the cloud logo to return to the dashboard.

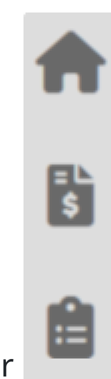
Invoice Summary

This panel shows the total amount due and the number of invoices. Selecting it will open the invoice page.

Inspection Summary

This panel shows the number of scheduled inspections and the next date. It is selectable and will open the inspections page to view all scheduled inspections.

Side Menu



- Home Icon - Returns to the dashboard
- Invoice Link - Opens the Invoice page
- Inspections Link - Opens the upcoming inspections page

Project Table

The project table lists all projects associated with the user's email address, whether or not they were applied for through the Portal.

Header

The top section of the Projects table includes links to the following:

- **+ Add a New Project Button** - [Create a new project.]()
- **Active** - List of current projects (open by default).
- **Completed** - Select the link to view the list of completed projects.

Columns in the Projects Table

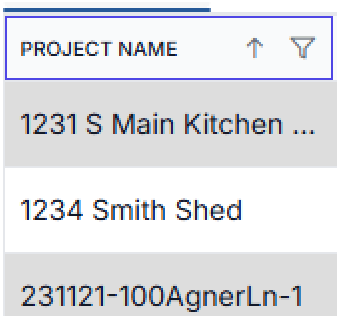
Each column title has the option to sort or search and filter the project rows.

Sorting Columns

Select the column title to make it active. An arrow will appear next to the active column title. Selecting the arrow will toggle through the following functions:

- sort ascending - up arrow (e.g. A to Z or 1 to 9)
- sort descending - down arrow (e.g. Z to A or 9 to 1)
- back to default sort (newest first) - arrow disappears

  This example image shows the projects table sorted by Project Name ascending.

  . 

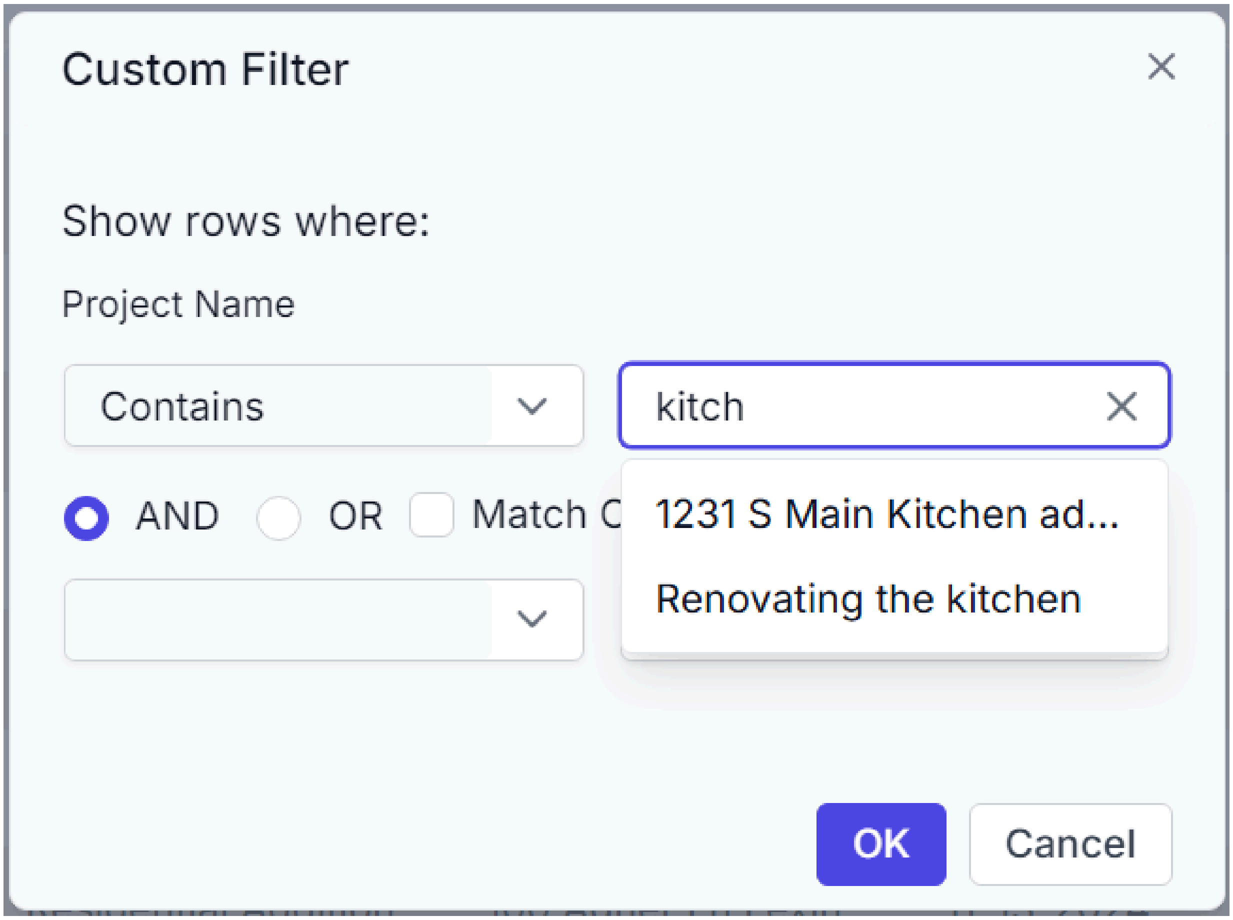
PROJECT NAME
1231 S Main Kitchen ...
1234 Smith Shed
231121-100AgnerLn-1

Column filters

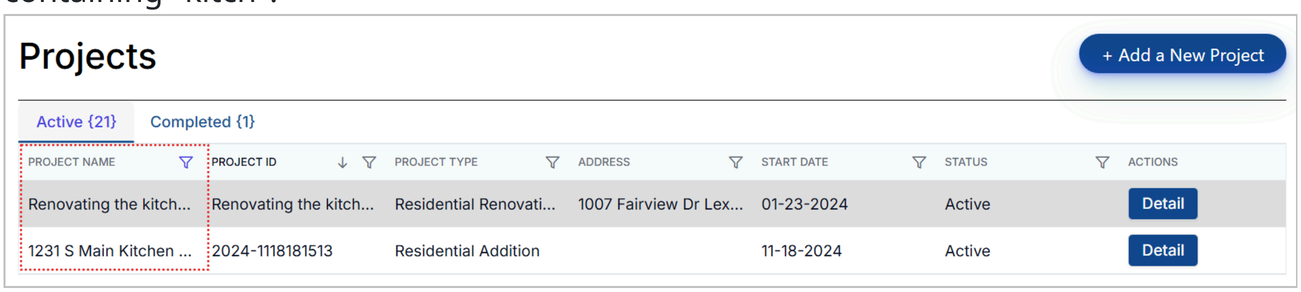
Select the funnel icon to search a column. You have the following options:

- Text filter - You can filter the table by values using a text search This search is best for the project name, ID, or address columns.
  1. Select the filter icon in the column you want to filter by.
  2. Select **Text Filters >**
  3. Choose one of the following parameter types:
     - **Equal** - the exact entered text is included
     - **Not Equal** - the exact entered text is **not** included
     - **Starts With** - the value begins with the entered text
     - **Ends With** - the value ends with the entered text
     - **Contain** - the entered text is within the value
     - **Does Not Contain** - the entered text is **not** found within the value
     - **Custom** - any combination of the above
  4. In the filter window, set the value(s) to filter on. For example: Contains "kitch" will return projects with that value in the name (shown below).

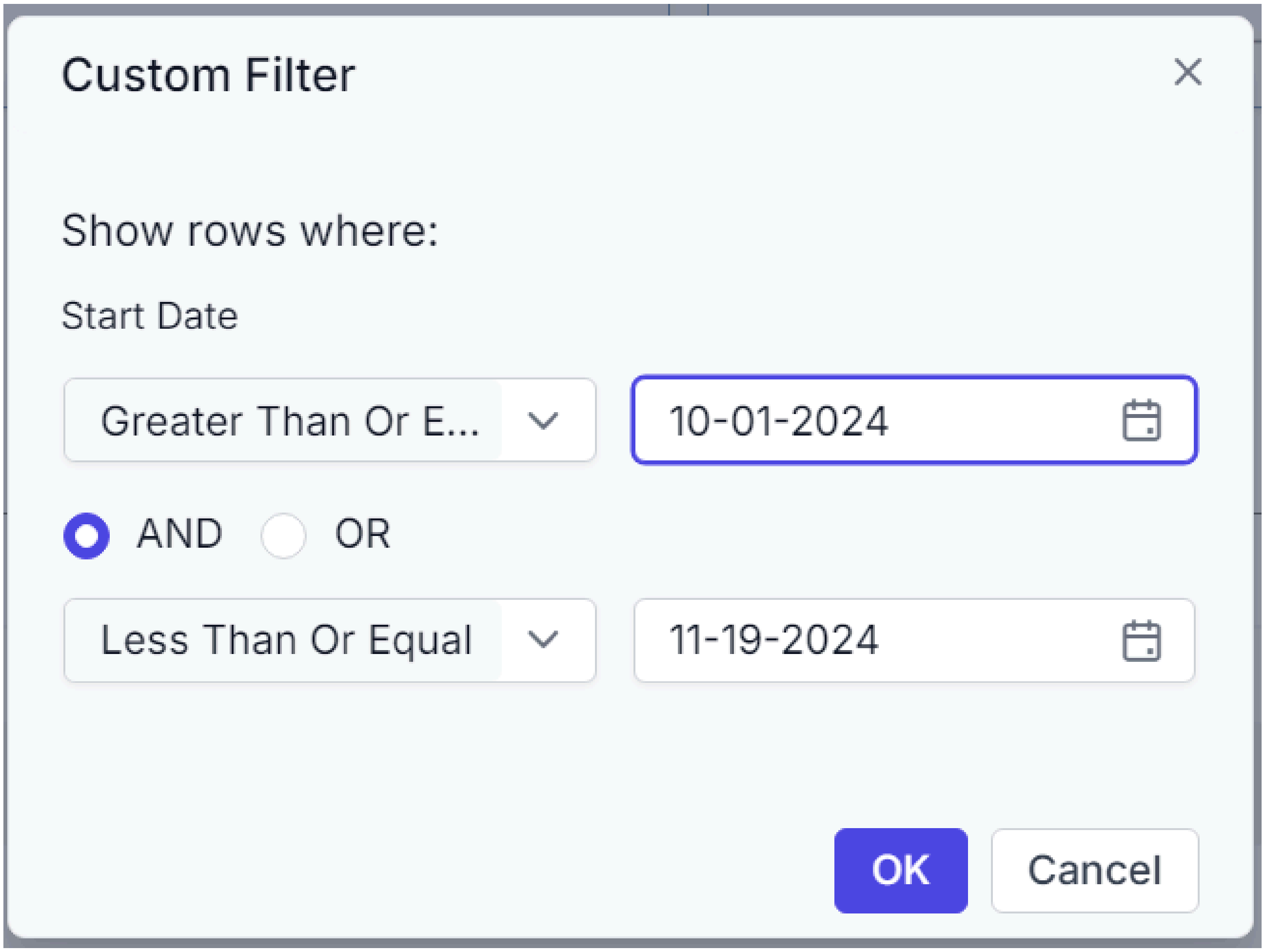
5. You can set more than one type and value using the AND/OR radio buttons. For example: Contains "kitch" or Contains "bath" will return projects with either of those values in the name.



This example image shows the project table column that has been filtered on text containing "kitch":

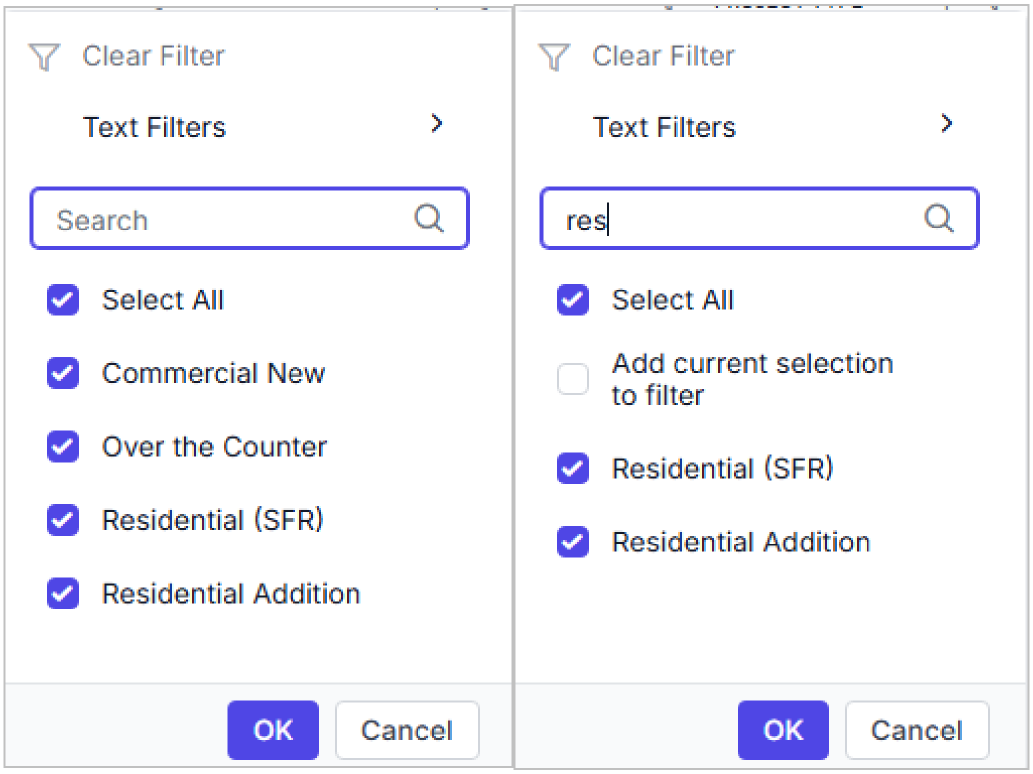


- **Date filter** - The Start Date column's text filter becomes a date filter. You can create a data range (between) and set a specific date the projects are newer (greater than) or older (less than).
  This example image shows a date range between the first of October and the 19th of November.



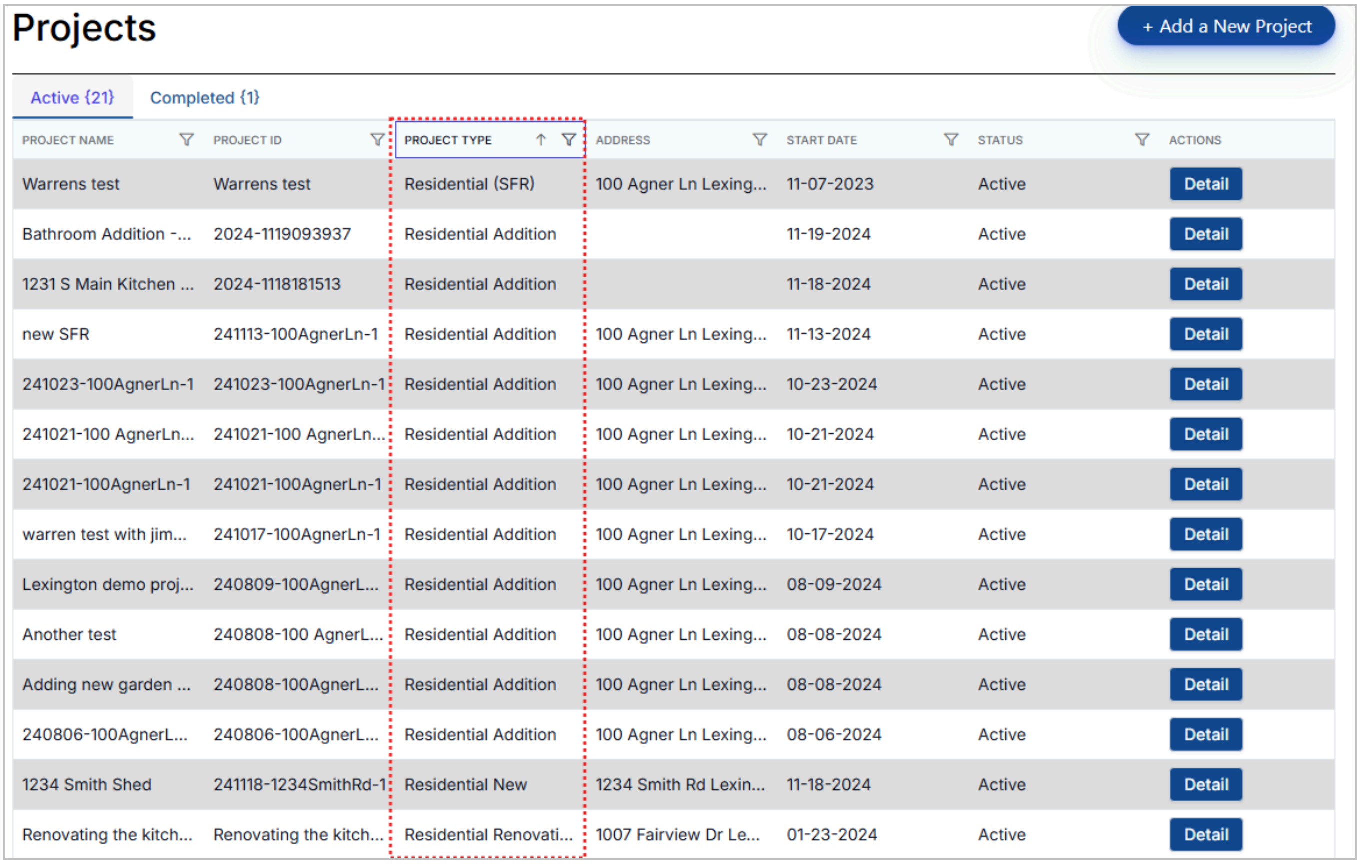
- **Value filter** - the search box below the text filter searches all of the values in the selected column. This can be used in combination with the checkboxes to filter the columns. This option is best to use when there are limit values in the column (i.e. in the Project Type or Status columns).
  1. When the filter box is first open, all values from the column are selected (because no filter is set).
  2. You can either type in the search box - this will limit the selection to the matching values (shown below).

Or you can select and deselect the checkboxes manually.



3. Select OK to apply the filter and you will returned the Projects table with only the filtered values displayed.
4. You can also use the sort options to change the order of the filtered projects.

This example image shows the Project table filtered by Project Types that include "res" and sorted by that column:



Projects

+ Add a New Project

Active (21) | Completed (1)

PROJECT NAME	PROJECT ID	PROJECT TYPE	ADDRESS	START DATE	STATUS	ACTIONS
Warrens test	Warrens test	Residential (SFR)	100 Agner Ln Lexing...	11-07-2023	Active	Detail
Bathroom Addition -...	2024-1119093937	Residential Addition		11-19-2024	Active	Detail
1231 S Main Kitchen ...	2024-1118181513	Residential Addition		11-18-2024	Active	Detail
new SFR	241113-100AgnerLn-1	Residential Addition	100 Agner Ln Lexing...	11-13-2024	Active	Detail
241023-100AgnerLn-1	241023-100AgnerLn-1	Residential Addition	100 Agner Ln Lexing...	10-23-2024	Active	Detail
241021-100 AgnerLn...	241021-100 AgnerLn...	Residential Addition	100 Agner Ln Lexing...	10-21-2024	Active	Detail
241021-100AgnerLn-1	241021-100AgnerLn-1	Residential Addition	100 Agner Ln Lexing...	10-21-2024	Active	Detail
warren test with jim...	241017-100AgnerLn-1	Residential Addition	100 Agner Ln Lexing...	10-17-2024	Active	Detail
Lexington demo proj...	240809-100AgnerL...	Residential Addition	100 Agner Ln Lexing...	08-09-2024	Active	Detail
Another test	240808-100 AgnerL...	Residential Addition	100 Agner Ln Lexing...	08-08-2024	Active	Detail
Adding new garden ...	240808-100AgnerL...	Residential Addition	100 Agner Ln Lexing...	08-08-2024	Active	Detail
240806-100AgnerL...	240806-100AgnerL...	Residential Addition	100 Agner Ln Lexing...	08-06-2024	Active	Detail
1234 Smith Shed	241118-1234SmithRd-1	Residential New	1234 Smith Rd Lexin...	11-18-2024	Active	Detail
Renovating the kitch...	Renovating the kitch...	Residential Renovati...	1007 Fairview Dr Le...	01-23-2024	Active	Detail

Clearing a filter

To clear a column filter, select the funnel icon and select **Clear Filter** at the top of the pop-up window.

Rows in the Projects Table

Each row in the table displays information about the project associated with the user's contact record. To see more information, select the **Detail** button for that row.