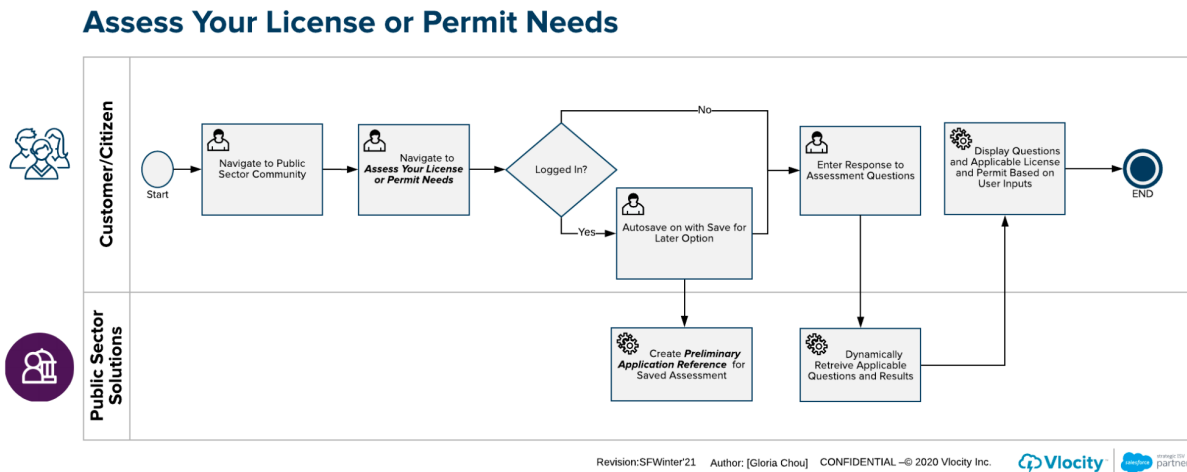


# Assess Your License or Permit Needs

*The Pre-Screen directs constituents to information about applicable regulations, programs, and/or authorizations based on their situation*



## Overview

A myriad different regulations, programs, and/or authorisations apply in different situations. For example, new businesses may require different licenses and permits depending on the type of business and their specific plans. The Prescreening Tool guides constituents in responding to pertinent questions and the presents the applicable information on regulatory details, processes, and links to apply. This pre-screen example is for a business owner; however, it can be adapted to other use cases such as applicable certifications or licenses for different occupations, permits for home improvement/building projects, or other programs.

## Use Case Scenario

When starting a new business, a prospective business owner needs to know what regulatory authorizations will be needed. This pre-screen example provides a list all the applicable authorizations, including licenses and permits, based on the responses provided. As a business owner (registered or guest), I want to search for applicable authorizations, including business registrations, certifications, licenses, and permits and other related information by providing information about my intended business (in the form of questions), so that I can quickly get a view of the requirements in one place. With the pre-screening process, a business owner should see all applicable authorizations based on the responses provided during the pre-screening process.

# Assumptions

- The form is exposed to unauthenticated and authenticated users via Salesforce Communities
- No synchronization with external system is considered
- LWC Omniscripts feature is not enabled in orgs that require PDF generation

## User Story

- The prospective business owner visits the agency's portal (Community) to fill out the relevant information in the pre-screening tool
- The tool guides the constituent through the OmniScript to input responses related to their planned business
- After the constituent submits the form, the system displays the applicable results with "Apply" button with link to application form

## Business Objective

Allows constituents to quickly get information specifically applicable to their situation.

## Business Value and Benefits

- Easy-to-use UI
- Quick questionnaire via website directs constituents to application information/details
- Process can be integrated with other business processes
- Mobile and iPad ready
- Registered users can view/resume saved pre-screens at any point of time

## Process Package Includes

Zip file includes the following:

### **Omniscript (1)**

1. Prescreening

### **Data Raptors (3)**

1. DRCreatePreliminaryAppRefPrescreeningType
2. DRGetPreliminaryApplicationId
3. UpdatePremAppRefCustom

# Configuration Requirements

- ContextId/UserId is required for logged in users to execute this process
- Data will NOT be stored in any sObject for this process