Everything you need to know about Performing Permit Rollovers/Renewals

What Does it Mean to Rollover/Renew Permits?

Permit rollovers, also referred to as **renewals**, describe the administrative process of transitioning an existing permit from its current, expiring validity period to a subsequent, new sales window. This procedure effectively establishes a new duration for which the permit remains valid and involves the requisite charge for this extended period.

For instance, consider a monthly permit holder. Their permit is initially configured within a January sales window, granting validity from January 1st to January 31st, at a cost of $100 for the month. In late January, this permit can be rolled over into a February sales window. This action sets the permit's new valid period from February 1st to February 28th, with an additional charge of $100 applied to the permit holder for the month of February.

To ensure a smooth permit rollover, you'll need:

- A new sales window set up correctly. Refer to the Sales Window wiki document to learn more.
- Permits marked as renewable in the previous sales window.

Before attempting rollovers, please follow the steps in these wiki articles to ensure you have activated the correct Sales Window and that you have your information correctly set up for automatic payments.

Read Sales Window Management and Credit Card Management in OPS-COM

For parkers with subscriptions, automatic payments can be processed as part of the rollover. This applies to patrons who pay by payroll deduction or credit card.

For Credit Card Payments: For automatic credit card processing on rollover, the user must have a valid credit card registered in the system, and it must be set as their **Prime Credit Card**. Note that your payment gateway must allow direct charging of client cards; this won't work with hosted payments only.

Automatic Permit Payments on Rollover/Renewal

Parkers with subscriptions setup in their account

Patrons who pay by payroll deduction or through credit card purchases can also have their payments processed automatically as part of the rollover process.

Performing Permit Rollovers

To begin a rollover:

1. Hover over **Permits** (Clock icon) and click **Sales Window**.
2. Click the **Rollover** button to open the **Permit Renewal** page**.**

> Before a rollover can be performed you must make sure that the new sales window you are rolling into has a start date that is equal to or greater than the end date of your previous sales window.

Select Rollover Options

1. From the permit Renewal window select the current sales window you are rolling over **from** (From Sales Window) on the left side of the form.
2. Then select the Sales Window you wish to roll the permits into. In our example we are rolling permits from the October Sales Window to the November Sales Window.
3. Select what user types we wish to roll over, or simply leave it as the default of **All User Types.**
4. Click on **Show Lots** to list all lots that can be rolled over in the selected Sales Window. The list of lots will appear below the search form.

Managing Individual Permits for Rollover

You can choose to include or exclude specific permits from the rollover.

1. To see the list of permits you can toggle for renewability, click either the **Holders** or **Renewing** button.
2. A list of permits in that lot will appear, allowing you to toggle whether they should be renewable or not. For example, if permits STAFF1000 and STAFF1001 are not renewing, they shouldn't roll over.
3. Click **Update Permits** to save your changes.

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Here's the logic for permit rollover states:

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Renewing	True	False	False	Neither the user, nor the permit exists, but the current permit is set to be renewed.
Blocked	True	False	True	The permit exists in the target sale window, but the user doesn't. This means anywhere for any permit in the lot. If the user has multiple permits and some of them renewed, then they technically are not blocked. If the user has been given a different permit, they also are not blocked.
Renewed	True	True	N/A	The user is considered renewed when they exist in the target sale window. Just like the note for blocked, it's not intended to be good for users with multiple permits.
Not Renewing	False	False	N/A	The user was not found in the target sale window and their permit is also not renewing. This is the expected scenario.
Not Renewing, but Exists	False	True	N/A	The user WAS found and their permit is not renewing. This could use some investigation to make sure that the user is supposed to have that permit or not.

Once you've completed this process for all lots you want to include in the rollover, click **Renew Permits** to continue. The screen will refresh and update the permit counts. Permits you toggled for

rollover will appear as rolled over, while those marked as not renewing will remain in the "Not Renewed" column and will be available for new users.

Monthly Lot		ⓘ Holders	ⓘ Renewing	ⓘ Blocked	ⓘ Renewed	ⓘ Not Renewing	ⓘ Not Renewing but Exists
☑	Company Staff lot	5	3	0	0	2	0
☑	Moore Street (lot)	3	0	0	2	1	0
☑	The Bicycle Lot 1	1	0	0	0	1	0

Permit Renewal / Rollover Changes

The next screen will renew all permits in the selected lots where possible. If there are permits that will not be renewed, please update the renewable state of each permit prior to this.

Clicking any of the buttons above to show the permits within that lot to make any changes needed.
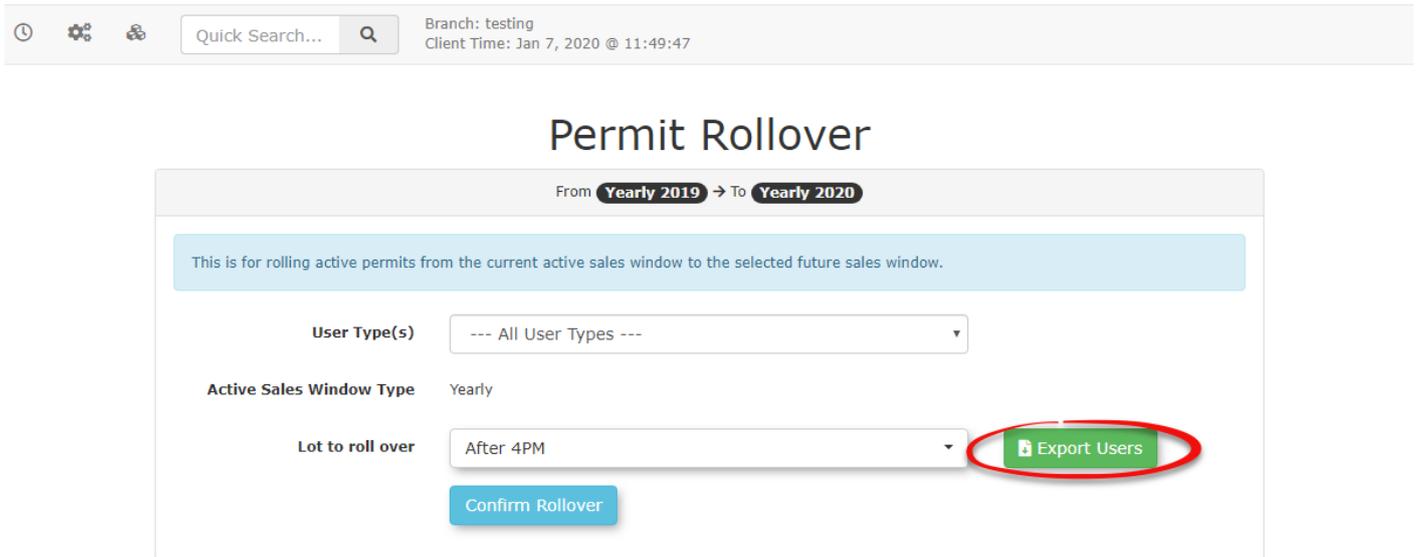
⬇ Export Users   Renew Permits

Permit Processing

The system automatically rolls over permits paid through gateway payment types like Mastercard, Visa, or Payroll Deduction. Users whose permits are rolled over but don't have an active payment subscription will need to make a payment to secure their permit. These Parkers will see the permit show up in their cart on the User Portal as unpaid. However, if a user has a payment subscription set up, their permit will be rolled over, and the payment will be processed automatically.

The **Process Payment** option will be automatically toggled on, and the **Credit Card Type** will appear for users whose payments can be processed automatically. If someone isn't continuing to park in a lot, simply uncheck the corresponding checkbox under **Rollover** to exclude them.

Click **Rollover Permits** to complete the process. Remember, you'll need subscriptions set up for payroll deductions, EFT, or credit card payments. You can prevent permits from rolling over by setting their renewable flag.

Exporting Users to Rollover

After clicking the **Rollover Permits** we can also choose to export an excel spreadsheet of all the users that are associated with the lot we have selected. To do this we click **Export Users** on the **Permit Rollover** page.

This will open a new window that generates the excel document for us to open depending on the browser you are using. You may be warned that the file is corrupt in some way however you should still be able to view the output in Excel's protective view.

Related Video

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