

# Using the Basic Waitlist Report

The **Basic Waitlist Report** provides OPS-COM administrators with a centralized view of all users currently on waiting lists, organized by parking lot. This report is a crucial tool for managing demand, enabling easy access to user profiles, facilitating communication, and streamlining the process of offering permits to waitlisted individuals.

## Setup & Configuration

Before users can join a waitlist or their data appears in this report, waitlist functionality must be properly configured within your OPS-COM system.

### Admin Side

- **Enabling Waitlists for Lots:** Instructions for enabling waitlists for specific lots can be found on the [Pricing & Lot Admin](#) page, under the **Standard Permits** section. Waitlists can be set up for individual lots or configured as grouped waitlists that cover multiple locations.
- **"Only Allow Waiting List after lot is Full" Setting:** This setting determines whether users will see the option to join a waitlist even before all permits for a designated lot are sold out, or only once the lot reaches full capacity.

### User Portal

You can configure the option to allow users to see their rank on the waitlist or not. To do this, follow the steps below:

1. Hover over **System Configuration** and click **System Settings**.
2. On the **Permits** tab, find and enable the **Show Waiting List Rank** checkbox.
3. Refer to [this page to see the User Experience](#).

## Using the Basic Waitlist Report

1. Hover over **Permits**, then **Waiting Lists**, and click **Waitlist Report**.
2. On the **Waitlist Report** screen, Administrators can view/edit details about a user waiting to purchase a permit in a specific lot.
3. This screen allows the admin to quickly see:

- The user's Rank on the waiting list
- The date they were added to the waiting list
- The user's name
- Their user type
- Their city
- Phone Number
- Comments
- The lot they are waiting for a permit in

If the record is highlighted in blue, the user does not currently have a permit assigned to them.

If the record is highlighted in yellow, the user does currently have a permit assigned but has not yet purchased it.

## Waiting List

Username

User Type

Public

Staff

Students

Athletics

Toggle All

### Lot: Red Student Lot West

Rank	Added To List	User	User Type	City	Phone	Comment	Lot
<input type="checkbox"/> 1	2022-05-04 @ 11:19 am	<a href="#">Callaghan, Joseph</a>	Public User	Manotick	6135555978	<a href="#">Add</a>	Red Student Lot West

### Lot: The Bicycle Lot 1

Rank	Added To List	User	User Type	City	Phone	Comment	Lot
<input type="checkbox"/> 1	2016-07-07 @ 10:35 am	<a href="#">Jamieson, Steph</a>	Part Time Student	Ottawa		Comments can be added <a href="#">Edit</a>	The Bicycle Lot 1

### Lot: General Monthly Lot 1

Rank	Added To List	User	User Type	City	Phone	Comment	Lot
<input type="checkbox"/> 1	2016-11-25 @ 2:39 pm	<a href="#">Campana, James</a>	Full Time Student	Carleton Place	6136013946	<a href="#">Add</a>	General Monthly Lot 1

### Lot: Residential Building 1

Rank	Added To List	User	User Type	City	Phone	Comment	Lot
<input type="checkbox"/> 1	2017-10-25 @ 12:09 pm	<a href="#">Dufresne, Andy</a>	Company Staff	Carleton Place	6132664949	<a href="#">Add</a>	Residential Building 1

Remove Selected Records

Email All Listed Users

Email All Selected Users

 Export

# Available Actions & Buttons

- The **User Profile icon** allows administrators to view and edit the user's profile. This is also the primary link administrators would use if they wanted to **sell a permit** to the user who is on the waiting list (click the **User Profile** icon and then the **Parking Tab** within their profile).
  - The **Add button** allows administrators to add comments specific to the waitlist record. If a comment already exists, an **edit link** will appear, allowing administrators to update the comments on file.
  - The **Toggle Selections** button allows administrators to select all records displayed in the report simultaneously. You can also make individual record selections by enabling the checkbox to the left of each record.
  - The **Export to Excel** button exports the entire table as an Excel spreadsheet for further analysis or record-keeping.
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## Best Practices & Considerations

- **Develop Business Rules:** Organizations should establish clear business rules for when to remove a user from the waitlist, such as after a user has been emailed an offer, or after a permit has been successfully purchased and processed.
  - **Proactive Management:** Regularly review the Waitlist Report to identify users who are next in line and to manage available permits efficiently.
  - **Communication:** Use the report to facilitate communication with waitlisted users, either individually or in bulk (using the export function for email lists, for example).
  - **User Experience:** If  **Show Waiting List Rank** is enabled, ensure users understand what their rank means and how it might change.
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Revision #19

Created 7 May 2024 07:50:22

Updated 25 June 2025 14:36:20 by Cedar Boulianne