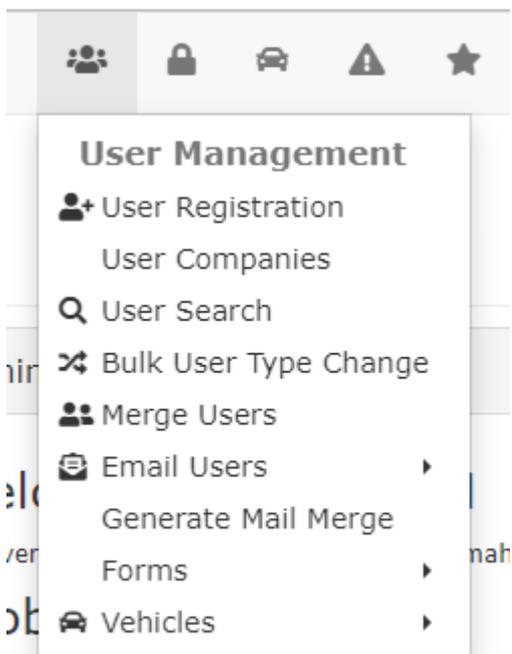


Company Setup and Invoices

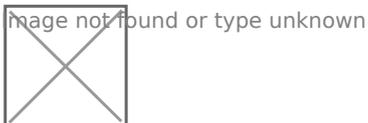
Create the Acme company

An Admin for ABC Parking must create a company entry for ACME in OPS-COM. Hover over **User Management** and click **User Companies**.



rt any problems or error messages immec

The Company Search page displays. Click the '**Create New Company**' button



The Company Edit page displays. For this example the Admin will enter the following information about the ACME company.

- **Account Number:**19380688
- **Company Name:** ACME Incorporated
- **Receives Invoices:** Checked
- **Address (Company):** 2946 Jerome Avenue
- **Invoice Emails:**James.Rockwood@ACMEINC.com
- **Contact Name:** James Rockwood

- **Address (Contact):** 4777 Ersel Street

Company Edit

[Back](#)

Account Number 

Account Name

Receives Invoice

Address

City

Province ▼

Postal

Tenant

Phone

Fax

Invoice Emails

Contact Name

Contact Address

Contact City

Contact Province ▼

Contact Postal

[Add New Company](#)

Click the **'Add New Company'** button to save the information. A green confirmation message displays that the company has been added.

Company Edit Back

Company has been added.

Account Number	<input style="border: 1px solid #ccc; border-radius: 4px;" type="text" value="19380688"/> 🗑️
Account Name	<input style="border: 1px solid #ccc; border-radius: 4px;" type="text" value="ACME Incorporated"/>
	✔ Receives Invoice
Address	<input style="border: 1px solid #ccc; border-radius: 4px;" type="text" value="2964 Jerome Avenue"/>
	<input style="border: 1px solid #ccc; border-radius: 4px;" type="text" value="Line 2"/>
	<input style="border: 1px solid #ccc; border-radius: 4px;" type="text" value="Line 3"/>

Assign Users to the Acme company

Search for the user profiles of the users you wish to add to the Acme company. Click User Management, User Search.

User Search

Username / Last Name / Email	<input type="text" value="jrockwood"/>	<input type="text" value="First name or initial"/>
Student Number OR Employee Number	<input type="text"/>	
Phone	<input type="text"/>	
Plate	<input type="text"/>	
Department	<input type="text"/>	
Tax Exemption Code	<input type="text"/>	
User Type(s)	<div style="border: 1px solid gray; padding: 2px;"> Athletics Member Complimentary Daily Reserved Demo Exchange Student Full Time Staff Full Time Student Part Time Staff </div> <p style="font-size: small;">Control + Click to select / deselect multiple types.</p>	
<input type="button" value="Search"/>		

	Username	FULL NAME	ADDRESS	CITY	Stu./Emp. No.	User Type
H	jrockwood	Rockwood, James	92 Baseline Road	Ottawa	0001234	Full Time Student

Click on a header to change sort order.
 Click on a username to edit profile, register permit or locker, and to view history.
 Click to view system history.
 Click to send user a mail message.

Edit the User profile and indicate if the user is an individual or as a company member. In this case they are a Company Member for Acme Company.

Allow Text2ParkMe reminders

There are no credit cards on file.

Company Member Individual

Company:

Company Billing Account

To designate a Company Manager, enable the **Company Manager** and **Company Billing Account** checkboxes. James Rockwood is the company manager for this example. He is the person who will pay for invoices for all users assigned to ACME.

Allow Text2ParkMe reminders

There are no credit cards on file.

Company Member Individual

Company: ACME Incorporated: 19380688|

Company Manager

Company Billing Account

Click the **Submit Registration Information for Processing...** button to save this.

In this example we added user **Colby** to the company as well. They are regular users. These user accounts that are created for the Company will not be used by the end user and are only for the Company Manager to use.

Manage the Company Account

The company manager (**John Doe Welch**) logs into the **OPS-COM** user portal. Now he can manage permits for his user Colby. Click on the **Company Users** icon.



Home Vehicles Permits Appeals Lockers Forms Payments English
Company Manager John Doe Welch

These menu elements will be generated based on the modules that are enabled on your system.

Personal Information

Mr. John Doe Welch (jrock)
jrock@demo.net
1 Demo Way
Carleton Place, Ontario
a1a1a1

Account Number:

Profile management is now handled from the menu on the right.

Vehicles			
BEEP	Ontario	Passenger	Active
2016	Not Listed	Unknown	Acura

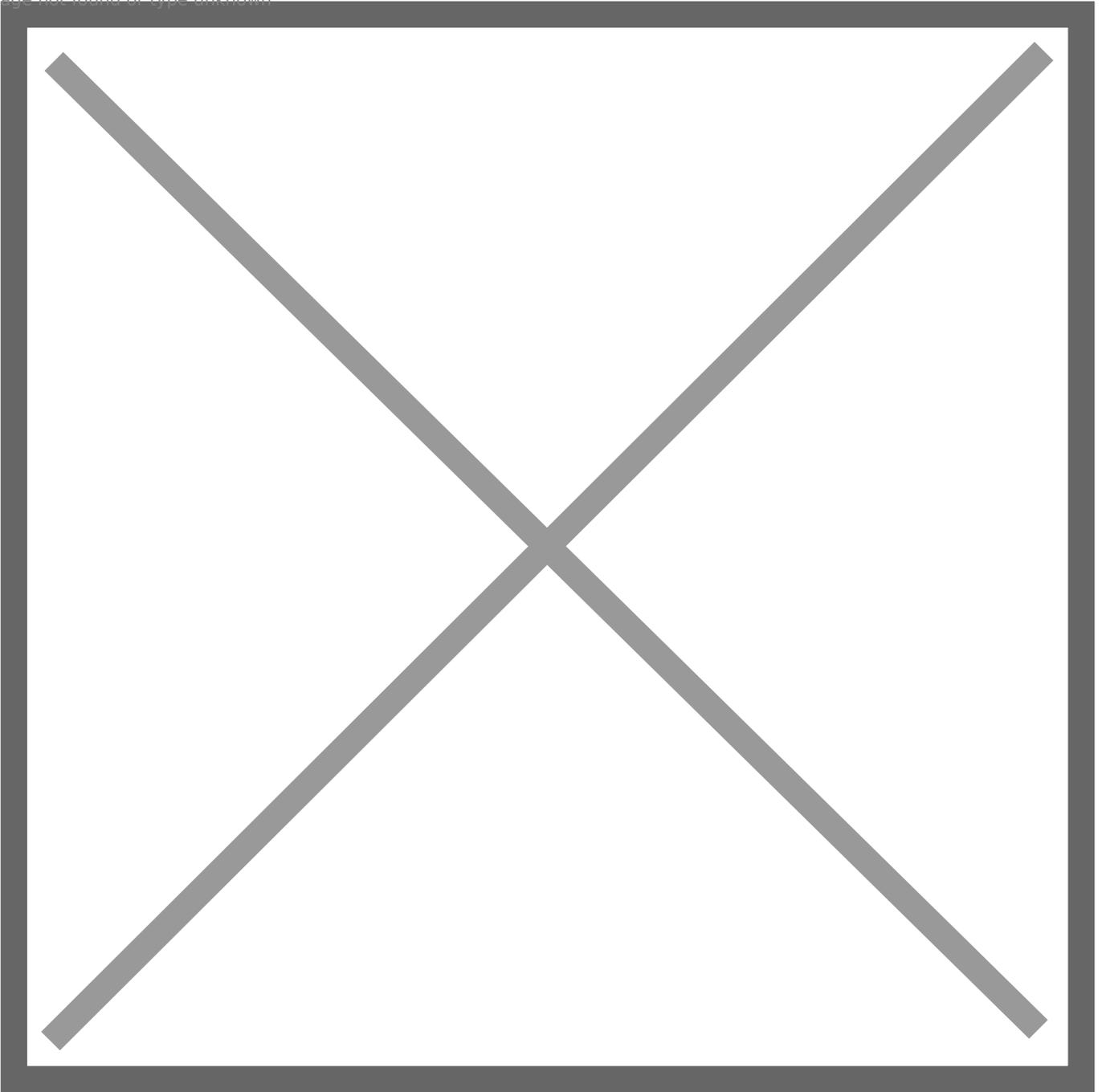
James wishes to purchase a permit for **Colbin**. He must login as the user to do so. Click the **Login as User** button to the right of **Colbin's** name.

Users

Name	Vehicle	Active Permits
Cobin Welch	AW87904	Login as Use
John Doe Welch	BEEP	Login as User

A blue message appears telling **John Doe Welch** that he is logged in as another user.

Image not found or type unknown



Click the **Parking** icon to buy a permit for **Colbin**.

These menu elements will be generated based on the modules that are enabled on your system.

Profile management is now handled from the menu on the right.

Personal Information	
Cobin Welch (cobin4248)	
cobinwelch@cmail.carleton.ca	
242 grooms ave oshawa, Ontario l1g4a3	
Student Number:	101155175

Vehicles			
AW87904	Ontario	Passenger	Active
2018	Pickup Truck	Silver	Chevrolet

In this example we selected a Standard Parking permit in **Red Student Lot West**. If the company is planning to pay for the permit through the user side (not using invoices) then **John Doe Welch** (*the company manager*) would select the "**proceed to payment**" button. In this example ACME company is using invoices to purchase permits. John Doe Welch would logout of the User Portal at this point.

Prepare Invoices

The admin user at ABC Parking must create the invoice for the company. This is done by hovering over the Allocations menu and clicking Prepare Invoices.

Prepare Invoices

Title	Outstanding Permits		Type	Days	Sale Start Date	Active Start Date	Sale / Active End Date
Monthly 1804 April	0	<button>Not Available</button>	M	29	Mar 15, 2018	Apr 1, 2018	Apr 30, 2018
Monthly 1805 May	0	<button>Not Available</button>	M	30	Apr 15, 2018	May 1, 2018	May 31, 2018
Monthly 1806 June	0	<button>Not Available</button>	M	29	May 19, 2018	Jun 1, 2018	Jun 30, 2018
Past - April Monthly	0	<button>Not Available</button>	M	1	May 19, 2018	May 19, 2018	May 20, 2018
Monthly 1807 July	1	<button>Prepare Invoice</button>	M	30	Jun 15, 2018	Jul 1, 2018	Jul 31, 2018
october	0	<button>Not Available</button>	M	30	Jul 11, 2018	Oct 1, 2018	Oct 31, 2018
Monthly 1808 August	0	<button>Not Available</button>	M	30	Jul 16, 2018	Aug 1, 2018	Aug 31, 2018
August	0	<button>Not Available</button>	M	30	Jul 17, 2018	Aug 1, 2018	Aug 31, 2018
Sept	0	<button>Not Available</button>	M	29	Jul 17, 2018	Sep 1, 2018	Sep 30, 2018
Seasonal 2018 Q1	0	<button>Not Available</button>	S	119	Dec 1, 2017	Jan 1, 2018	Apr 30, 2018
Seasonal 2018-2 Summer	0	<button>Not Available</button>	S	122	Apr 1, 2018	May 1, 2018	Aug 31, 2018
Seasonal 2018-3 Fall	0	<button>Not Available</button>	S	121	Aug 1, 2018	Sep 1, 2018	Dec 31, 2018
Test Annual	1	<button>Prepare Invoice</button>	Y	10958	Jan 1, 2015	Jan 1, 2015	Jan 1, 2045
Next Year Allocation	0	<button>Not Available</button>	Y	425	Nov 1, 2016	Nov 1, 2016	Dec 31, 2017
Yearly 2017	0	<button>Not Available</button>	Y	381	Jun 1, 2017	May 15, 2017	May 31, 2018
Yearly 2018	0	<button>Not Available</button>	Y	364	Nov 1, 2017	Jan 1, 2018	Dec 31, 2018
Yearly 2019	0	<button>Not Available</button>	Y	364	Nov 1, 2018	Jan 1, 2019	Dec 31, 2019

Click the **Prepare Invoices** button beside the active sales window. The number of invoices that can be prepared for that time frame show as a number to the left of the button.

Monthly 1807 July	1	<button>Prepare Invoice</button>	M	30	Jun 15, 2018	Jul 1, 2018	Jul 31, 2018
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The invoice for the ACME company will be displayed, including one permit (the one created for the user **Joseph Callaghan**). Click the **Send Invoices** button to send the invoice to the ACME company.

NOTE: An invoice email template must be already in place prior to being able to prepare invoices. The email template can be modified by the Admin by going to **System Config/ Email Templates**.

Prepare Invoices

Invoicing for Monthly 1807 July (M)

This is for rolling active permits from the current active sales window to the selected future sales window.

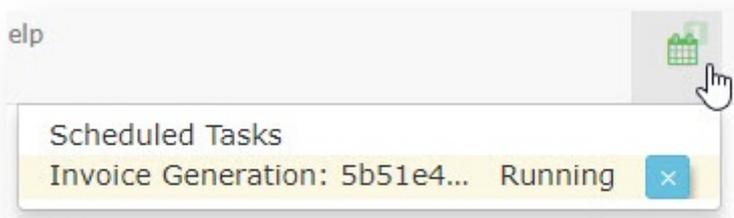
Invoice	Total Permits	Total Amount	Account Number	Account Name	Contact Name	Email	
<input checked="" type="checkbox"/>	1	\$113.00	19380688	ACME Incorporated	Company	James Rockwood	James.Rockwood@ACMEINC.com

Send Invoices

A green confirmation message is displayed indicating the invoice is scheduled.



There will be an icon on the top right of the menu bar that will indicate the progress of the invoices being created. Once completed it will then be sent to the **Company Billing Account** designate.



In the event of an error, the Admin may opt to cancel the invoice, correct the error and then reissue the invoice.

Paying an Invoice as a Company Manager

Once the company manager at ACME receives the invoice, they must log in to the **OPS-COM** user portal and click the **Payments** icon. **Joseph Callaghan's** permit now available for payment.

Payments

Permits				
Sales Window	Submit Date	Permit Number	Amount	
<input checked="" type="checkbox"/> Test Annual	2019-09-30	59	\$169.50	
Permits - Total Owing			\$169.50	

Subtotal	\$150.00
Taxes	\$19.50
Total Owing	\$169.50

[Continue to Checkout](#)



Tomahawk DEMO University
 92 Bridge St., Carleton Place, ON
 K7C 2V3
 +1.855.410.4141
info@ops-com.com

The *complete* parking and security management solution that links parking, violation and incident management collectively.

OperationsCommander (OPS-COM) will **AMPLIFY**, **AUTOMATE** and **ANALYZE** your parking and security needs.

The Company Manager can Continue to Checkout and submit the payment in the method they prefer. This completes the cycle.

Revision #3

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Updated 11 September 2024 13:40:49 by Cedar Boulianne