# Performing Permit Rollovers

When to Rollover Permits

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

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

Performing Permit Rollovers

To begin a rollover hover over **Permits** and click **Permit Renewals.** Click **Rollover Users** to launch the **Rollover Wizard utility.**
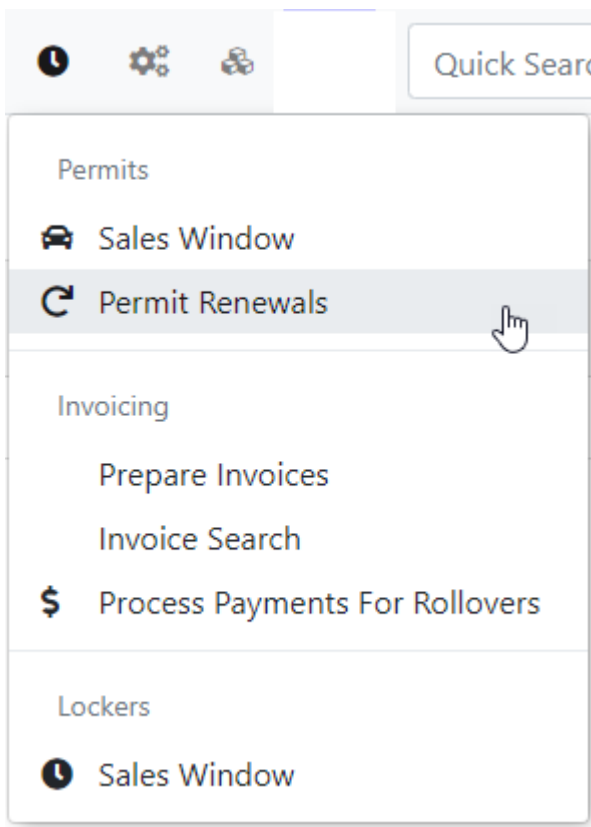
Important

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.

You may perform the steps outlined in the Sales Window Management and Credit Card Management in OPS-COM articles, to show you how you can set up sales windows before performing a rollover.

Select Rollover Options

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.

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.
At this point, we have the ability to select what user types we wish to roll over, or simply leave it as the default of **All User Types.**

Permit Renewals

From Sales Window

Started - Monthly October - Sep 26, 2022

→

To Sales Window

November 2022 - October 24, 2022

User Types

--- All User Types ---
Public
   ADA User
   New User
   Public User
   Resident 1
   Resident 2
   VeritasComm
Staff
   Company Executive
   Company Staff
   Contractor

Show Lots

● Select Sale Windows → ○ Select Lots → ○ Process Renewals

We also have the ability to select what user types we wish to roll over, or simply leave it as the default of **All User Types.**

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.

--- All User Types ---
Public
   ADA User
   New User
   Public User
   Resident 1
   Resident 2

Permit Renewals

From Sales Window

| Started - Monthly October - Sep 26, 2022 ▾ |

→

To Sales Window

| November 2022 - October 24, 2022 ▾ |

User Types

```
--- All User Types ---
Public
    ADA User
    New User
    Public User
    Resident 1
    Resident 2
    VeritasComm
Staff
    Company Executive
    Company Staff
    Contractor
```

Show Lots

○ Select Sale Windows → ● Select Lots → ○ Process Renewals

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**

You may choose to include or excuse specific permits from the rollover. To see the list of permits that you can toggle for renewability click on either the **Holders** or the **Renewing** button.

A list of permits in this lot will appear where you can toggle whether you wish to have permits renewable or not. In our example below permits STAFF1000 and STAFF1001 are not renewing and therefore should not roll over.

Be sure to click **Update Permits** to save your changes.

Here's the logic used for each column:

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 have completed this process for all lots you wish to include in the rollover process click on **Renew Permits** to continue.

Show Lots

	Select Sale Windows	→	● Select Lots	→	Process Renewals

Monthly Lot	ℹ Holders	ℹ Renewing	ℹ Blocked	ℹ Renewed	ℹ Not Renewing	ℹ 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

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⬇ Export Users   Renew Permits

The screen will refresh and update the permit counts. As in our example here you can see in the Company Staff Lot the 3 permits we left toggled on for rollover have indeed rolled over and the 2 permits we toggled as not renewing remain in the **Not Renewed** column. These two permits will now be available to be purchased by new users once your sales window for November is active.

Show Lots

	Select Sale Windows	→	● Select Lots	→	Process Renewals

Monthly Lot	ℹ Holders	ℹ Renewing	ℹ Blocked	ℹ Renewed	ℹ Not Renewing	ℹ Not Renewing but Exists
✓ Company Staff lot	5	0	0	3	2	0
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Permit Renewal / Rollover Changes

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⬇ Export Users   Renew Permits

Permit Processing

It is important to note how the permits can be processed after or during the rollover process. The system is set up to automatically roll over permits that have been paid through **gateway payment** types such as **Mastercard, Visa. Payroll Deduction** etc.

In this example, Users will be rolled over but will need to make a payment in order to secure their Permit. However, if the user has a payment subscription setup they will be rolled over and the payment will be processed automatically.

Note that the **Process Payment** will be automatically toggled on (will be processed) as well as the **Credit Card Type** appears in the button for users that can be processed automatically. If for any reason, the person is not continuing to park in a given lot, simply exclude them from the rollover by unchecking the corresponding checkbox under **Rollover.**

1. Click **Rollover Permits** to complete the process.
2. You will need subscriptions set up for payroll deductions, EFT or credit card payments.

You can prevent permits from rolling over by setting the renewable flag on the permit.

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

https://www.youtube.com/embed/R02qrltP3RM?wmode=opaque

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