

Re-Sending an Invoice

Re-Sending an Invoice

In some cases, it may be necessary to re-send an invoice.

For example, if the client mistakenly deleted the email, the admin can search up the original invoice and send it again.

There are two different methods through which this can be done.

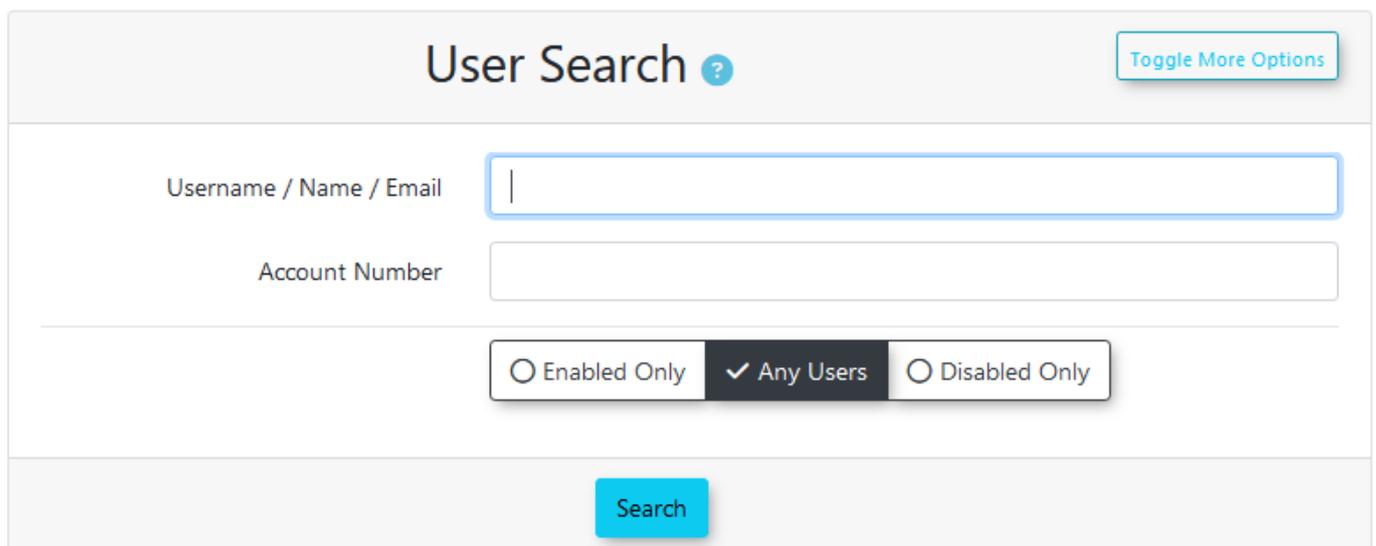
- Through the user's history.
- Through the search invoice page.

Through User Search

The user search can be found under the menu tree:

- **User Management -> User Search**

Once on the user search page, enter the user information and search the user.



The screenshot shows a 'User Search' interface. At the top, the title 'User Search' is displayed with a help icon (a question mark in a blue circle) to its right. In the top right corner, there is a button labeled 'Toggle More Options'. Below the title, there are two input fields: the first is labeled 'Username / Name / Email' and the second is labeled 'Account Number'. Below these fields, there are three radio button options: 'Enabled Only', 'Any Users' (which is selected and highlighted in dark grey), and 'Disabled Only'. At the bottom center of the form, there is a blue 'Search' button.

In the results section, click on the **username** to access the user's profile.

| | Username | Full Name | Address | City | Account Number | Phone Number | User Type | User Directory |
|---|-----------|----------------|---------|-------------|----------------|--------------|-----------|----------------|
|    jdoe | Doe, Jane | 123 Any Street | AnyTown | JD321 JD321 | | Resident 1 | OPSCOM | |

Once on the user's profile, hover over **History** and navigate through the menu **History -> All Records** to access the list of this user's transactions.

Profile ▾ Lockers Vehicles Parking Payments **History ▾** Incident History Doe, Jane (jdoe)

People Alarm

Basic Profile Information Edit

| | |
|--------------------|-----|
| Enabled | Yes |
| User Directory | |
| Unique ID | |
| User Type | |
| Username | |
| Name | |
| Email Address | |
| Phone Number | |
| Date of Birth | |
| Preferred Language | |

Vehicles Edit

| Status | Plate | Type | Province | Make | Year |
|--------|--------|-----------|----------|----------|------|
| Active | ABC461 | Passenger | Ontario | Cadillac | 2001 |

Showing 1 vehicles.

Active Permits

| Permit | Active Window | Lot Name | Amount |
|------------------------|---------------|-------------------|----------|
| STAFF1000 | S : TEST | Company Staff lot | \$113.00 |

Locate and click on the **invoice number** that needs to be re-sent.

This will open the invoice preview page.

Viewing Jane Doe's History

[Complete History Log](#) **26**

Invoices **3**

| Billing Date | Due Date | Invoice # | Items | Amount | Pay Date |
|---------------|---------------|-----------|-------|---------|--|
| Nov. 19, 2020 | Dec. 19, 2020 | 1019 | 1 | \$28.25 | Processed: Aug. 20, 2024 |
| Nov. 19, 2020 | Dec. 19, 2020 | 1019 | 1 | \$0.00 | Processed: Aug. 20, 2024 |
| Nov. 19, 2020 | Dec. 19, 2020 | 1020 | 1 | \$0.00 | Processed: Aug. 20, 2024 |

Once in the invoice preview page, locate the **Re-send Email** button.

Click on this button to re-send the invoice.

Address of Invoicing Company
 Address line 2
 Address line 3

Sample Invoice

Bill To: Jane Doe
 Jane Doe
 123 Any Street
 AnyTown, ON
 K0A1A0

Invoice No.: 1019
 Date: 11/19/2020
 Due Date: 12/19/2020

| Name | Item | Item Details | Quantity | Rate | Amount | Tax |
|----------|--------|--|----------|---------|---------|-----|
| Jane Doe | Permit | 2500 Window: Long Term Parking Lot: GOL | 1 | \$25.00 | \$25.00 | Yes |

Subtotal \$25.00
 Taxes \$3.25
 Total \$28.25

Balance Due \$28.25

Paid on Aug 20, 2024

Re-send Email

The invoice email will be re-sent to the user.

The title will indicate that it is an invoice that has been re-sent.

Re-sent: Invoice is ready: Jane Doe

From: [REDACTED]

To: [REDACTED]

Through Invoice Search

The other way to locate an invoice to re-send is using the **Invoice Search** tool.

The page can be found under the menu tree:

- **Permits -> Invoice Search**

This will open the invoice search page.

Invoice Search Toggle More Options

| | | |
|-------------------|---|--|
| Billed On | <input type="text" value="Billed On Start"/> | <input type="text" value="Billed On End"/> |
| Due Date | <input type="text" value="Due Date Start"/> | <input type="text" value="Due Date End"/> |
| Cancelled Status | <input style="width: 100%;" type="text" value="Cancelled and Valid"/> | |
| Paid Status | <input style="width: 100%;" type="text" value="Paid and Unpaid"/> | |
| Invoice Number | <input type="text"/> | |
| First / Last Name | <input type="text"/> | |
| Company | <input type="text" value="Any Company"/> | |

Enter the search criteria and click search.

Locate the invoice number within the results and click on it.

4 records found.

| Lot ADA Temp Lot | | | | | | | | | | | | | |
|------------------|----------|---------|--------------|--------------|---------|---------|--------|--------|--------|---------|------|----------------|--------|
| # | Account | Invoice | Billing Date | Due Date | Permits | Parking | Tax | Total | Status | Paytype | Lock | Processed Date | Cancel |
| | Jane Doe | 1019 | Nov 19, 2020 | Dec 19, 2020 | 1 | \$0.00 | \$0.00 | \$0.00 | Paid | Cash | | Aug 20, 2024 | Cancel |
| | Jane Doe | 1020 | Nov 19, 2020 | Dec 19, 2020 | 1 | \$0.00 | \$0.00 | \$0.00 | Paid | Cash | | Aug 20, 2024 | Cancel |

| Lot Guest Overflow Lot | | | | | | | | | | | | | |
|------------------------|----------|---------|--------------|--------------|---------|---------|--------|---------|--------|---------|------|----------------|--------|
| # | Account | Invoice | Billing Date | Due Date | Permits | Parking | Tax | Total | Status | Paytype | Lock | Processed Date | Cancel |
| | Jane Doe | 1019 | Nov 19, 2020 | Dec 19, 2020 | 1 | \$25.00 | \$3.25 | \$28.25 | Paid | Cash | | Aug 20, 2024 | Cancel |

| Lot Red Student Lot West | | | | | | | | | | | | | |
|--------------------------|-------------|---------|--------------|--------------|---------|------------|----------|------------|--------|---------------------------|------|----------------|--------|
| # | Account | Invoice | Billing Date | Due Date | Permits | Parking | Tax | Total | Status | Paytype | Lock | Processed Date | Cancel |
| 001 | ACME Meters | 1018 | May 29, 2019 | Jun 28, 2019 | 2 | \$1,050.00 | \$136.50 | \$1,186.50 | Paid | Electronic Funds Transfer | | Sep 26, 2022 | Cancel |

Like with the previous method, this will open the invoice preview where the re-send email button can be found.

Address of Invoicing Company
Address line 2
Address line 3

Sample Invoice



Invoice

Bill To: Jane Doe
Jane Doe
123 Any Street
AnyTown, ON
K0A1A0

Invoice No.: 1019
Date: 11/19/2020
Due Date: 12/19/2020

| Name | Item | Item Details | Quantity | Rate | Amount | Tax |
|----------|--------|---|----------|---------|---------|-----|
| Jane Doe | Permit | 2500 Window: Long Term Parking Lot: GOL | 1 | \$25.00 | \$25.00 | Yes |

Subtotal \$25.00
Taxes \$3.25
Total \$28.25

Balance Due \$28.25



Paid on Aug 20, 2024

Re-send Email

This will re-send the invoice email to the user.

Printing From Emailed PDF

A PDF of the invoice can be printed from the email that was sent.

First navigate to the invoice email in the client email and find the where attachments are stored.

Re-sent: Invoice is ready: Jane Doe

From: [redacted]
To: [redacted]

Show Headers

HTML HTML Source Text Raw Spam Analysis HTML Check 3 Tech Info

2024-06-17 15:31, 110 KB
Attachments (1)



Sample Invoice

Bill To: Jane Doe
Jane Doe
123 Any Street
AnyTown, ON
K0A1A0

Invoice No.: 1019
Date: 11/19/2020
Due Date: 12/19/2020

Address of Invoicing Company
Address line 2
Address line 3

Invoice

In this example, the attachments are located in the top right.

2024-06-17 15:31, 110 KB
Attachments (1)

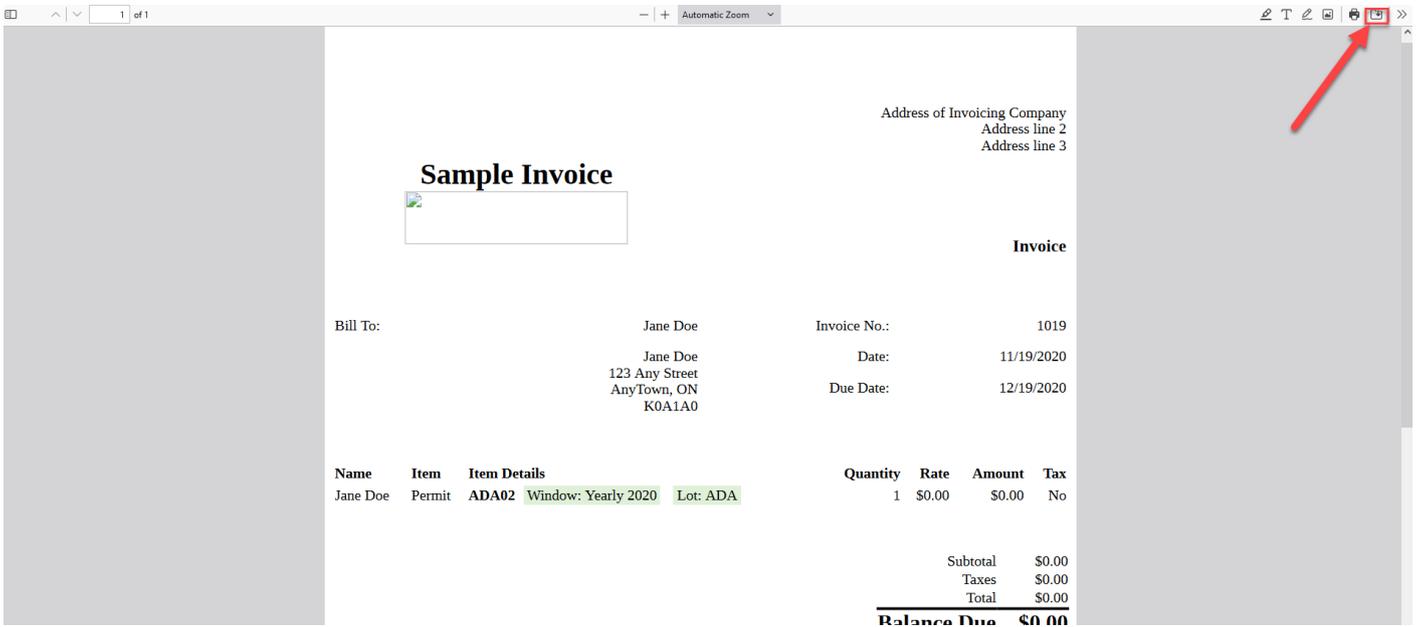
Invoice1019.pdf 77 KB

Download the PDF when prompted.

After the file has been downloaded, the PDF will automatically open, likely in the web browser.

Printing directly from this page will result in the printout being cut-off. To prevent this, first download the PDF to your computer disk.

The save button will be located in the top right.



Save the file to the preferred location and open it with any PDF reader.

From here, print the PDF like a normal document while ensuring that the print scale is set to 100%.

This will prevent the printout from being cut-off.

Revision #3

Created 13 September 2024 15:58:03 by Nicole

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