

Rollover - Subscription Verification Report

The Subscription Verification Report is a report designed to automatically identify customers who have saved credit card information in their accounts but *haven't* signed up for the automated permit rollover subscription.

Quick Steps:

Granting Access (for Admin Managers):

1. Go to 'System Configuration' > 'Admin Management' > 'Manage Roles'.
2. Next to the desired Role, click 'Permissions'.
3. On the "Editing Permissions" page, find the 'Parking' menu and enable 'Access Subscription Report'.

Running the Report:

1. Navigate to the 'Permits' Menu > 'Rollovers' section.
2. Click on 'Subscription Verification Report'.
3. The report will automatically load with a list of customers.
4. Click any 'Username' to jump straight to their customer profile.
5. Need to export? Use the options on the page to save as CSV or Excel, Copy, or Print.

Detailed Instructions:

1. Before your admins can dive into the new report, you'll need to ensure they have the proper permissions. Here's how to grant access:

- a) Navigate to System Configuration: From your admin portal, go to 'System Configuration'.
 - b) Select Admin Management: Under 'System Configuration', choose 'Admin Management'.
 - c) Go to Manage Roles: Click on 'Manage Roles'.
 - d) Edit Role Permissions: On the "Manage Administrator Roles" page, find the role you want to update and click the 'Permissions' button next to it.
 - e) Enable Report Access: On the "Editing Permissions" page, locate the 'Parking' menu and then enable the 'Access Subscription Report' setting.
2. Navigate to the Permits Menu: In your admin portal, look for the 'Permits' menu option then find the 'Rollovers' section.

3. Choose "Subscription Verification Report": Within 'Rollovers', you'll find the new 'Subscription Verification Report' option. Click on it!
 4. View the Report: As soon as you click, the report will load automatically, displaying a list of customers who have stored credit card information but do not have an active permit rollover subscription.
 5. Explore Customer Details: The 'Username' in the report is a clickable button! Clicking on it will take you directly to that customer's profile page, allowing you to quickly view their details and take any necessary action.
 6. Export Your Data: Need to work with this data offline? No problem! The report has built-in functionality to export the information to both CSV and Excel formats, Copy, or Print. Look for the export options on the report page.
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