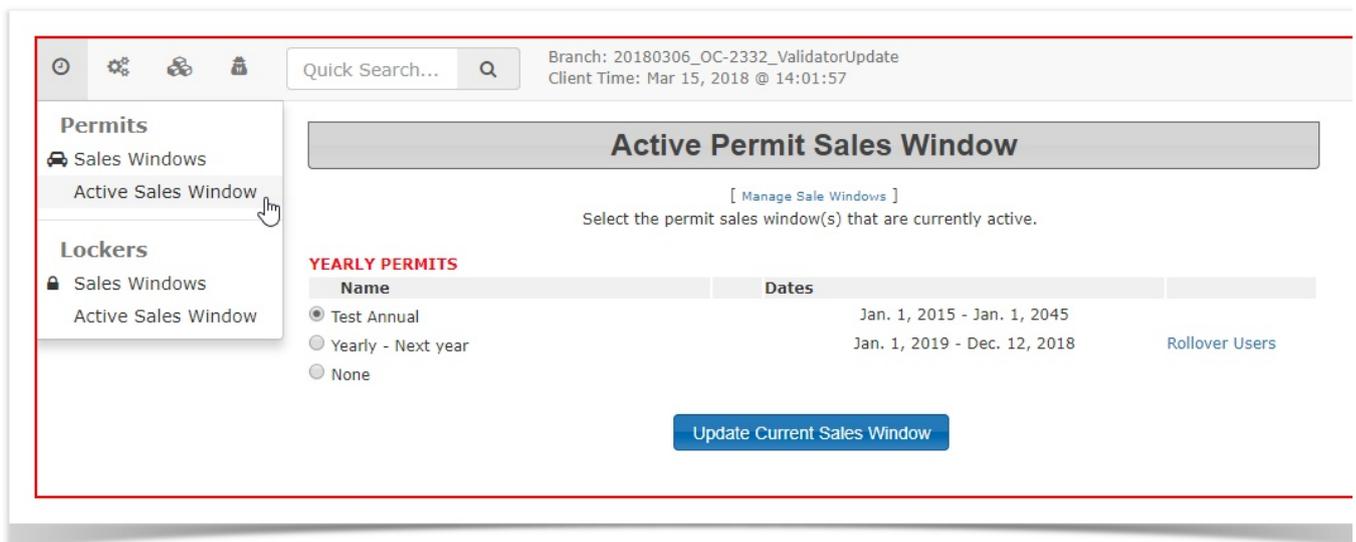


Sending Invoices in Advance of Payment

1. To begin, start a regular rollover process, by going into the **Permits** menu and selecting **Active Sales Window**. Click on **Rollover Users** to enter the rollover wizard.



2. By **deselecting** the preferred payment method here you can perform a rollover that will not process automated payments.

Permit Rollover

From **Test Annual** → To **Yearly - Next year**

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

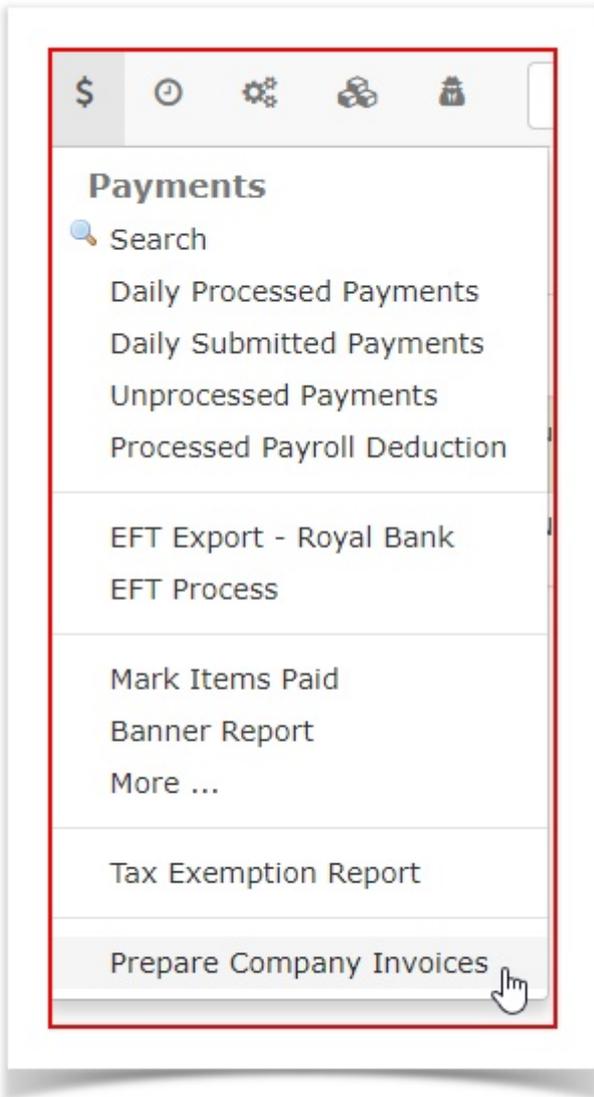
Rollovers can be performed multiple times. If the permit already is associated to the user in the new Sales Window, it will be ignored. It will **NOT** attempt a payment on the subsequent attempts.

If the permit does not exist, it can attempt a payment for that user if applicable and selected.

Rollover	Process Payment Payment Type	First Name	Last Name	Student No. Employ No.	Permit No.	Permit State
<input checked="" type="checkbox"/>	<input type="checkbox"/> Electronic Funds Transfer	John	Doe		0003	Good
<input checked="" type="checkbox"/>	<input type="checkbox"/> Electronic Funds Transfer	John	Griffiths		0002	Good
<input checked="" type="checkbox"/>	<input type="checkbox"/> Visa	Michael	Ashbury	00800147	0005	Good

Rollover Permits

- By clicking **Rollover Permits**, the system will enter these permits in a state of awaiting payment and allow for an invoice to be created.
To access the invoicing tool, go into the **Payments Menu** and select **Prepare Company Invoices**.



4. The **Prepare Invoice** window will open showing the users who have been set up for invoicing through the rollover process.

The screenshot shows a window titled "Prepare Invoices" containing a table with the following data:

Title	Outstanding Permits	Type	Days	Sale Start Date	Active Start Date	Sale / Active End Date
Test Annual	3	Y	10958	Jan 1, 2015		Jan 1, 2045
Yearly - Next year	0	Y	-384	Jan 1, 2019	Dec 31, 2019	Dec 12, 2018

5. By clicking on **Prepare Invoice**, the system will generate an email with the invoice as the body of message.

Re-Sending an Invoice

When do we use this?

It is also possible to change the email and **re-send** or just resend an invoice if the client requests a second copy sent.

If for example the client mistakenly deleted the email, the admin has the ability to search up the original invoice and send it again.

In our sample here we are looking for an invoice for **Voula Costa**.

1. To do so there are two different methods. You can find the invoice in the **user's profile under History** or you can search for the invoice through the **Search Invoice** utility.
2. Firstly let's search the user in question: In this case using the last name **Costa**.

User Search

Username / Last Name / Email	<input type="text" value="Costa"/>	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;"><ul style="list-style-type: none">Athletics MemberComplimentaryDaily ReservedDemoExchange StudentFull Time StaffFull Time StudentPart Time Staff</div> <small>Control + Click to select / deselect multiple types.</small>	
<input type="button" value="Search"/>		

Username	FULL NAME	ADDRESS	CITY	Stu./Emp. No.	User Type	User Directory
  Vcosta	costa, Voula	159 Penny Lane	Stittsville		Daily Reserved	OPSCOM

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.

3. Click on the **username** to access the user's profile.

Username	FULL NAME	ADDRESS	CITY	Stu./Emp. No.	User Type	User Directory
Vcosta	costa, Voula	159 Penny Lane	Stittsville		Daily Reserved	OPSCOM

4. Once in the user's profile hover over **History** and click on **All Records** to access the list of this user's transactions.

The screenshot shows the user profile page for 'Costa, Voula (VCosta)'. The navigation bar includes 'Profile', 'Lockers', 'Vehicles', 'Parking', 'Payments', 'History', and 'Incident History'. The 'History' dropdown menu is open, with 'All Records' circled in red. Other options in the menu include 'Locker Records', 'Parking', 'Enforcement', 'Adjustment Records', 'Address Records', and 'Mail Records'. The main content area shows 'Basic Profile Information' with fields like 'Enabled', 'User Directory', 'User Type', 'Username', 'Name', 'Email Address', and 'Auto Login Address'. There is also a 'Vehicles' table and a 'User Notes' section.

Status	Plate	Type	Province	Make	Year
Active	VCOST	Passenger	Ontario	Ford	

5. Locate and click on the **invoice number** that you wish to resend.

User History

[View Complete History](#) ?

14 records

Locker Records

No locker records found.

Invoice Records

Billing Date	Due Date	Invoice No.	Items	Amount	Pay Date
Feb. 21, 2019	Mar. 23, 2019	1018	1	\$282.50	Awaiting Payment

Parking Permit Records

Monthly 1805 May						M : Apr 15,2018 - May 31,2018	
	Submit Date	Barcode #	Permit #	Amount	Pay Date		
[InActive]	May. 18, 2018		Lilac L103	\$251.57	Processed: May. 18, 2018 Released: May. 18, 2018		
<i>Released back to system by refund process</i>							
[InActive]	May. 18, 2018		Lilac L104	\$0.00	Processed: May. 18, 2018 Released: May. 18, 2018		
<i>Released back to system by refund process</i>							
[ADJUST]	May. 18, 2018		Lilac L103	\$282.50	Processed: May. 18, 2018		

- Once in the invoice preview you will notice the **Re-Send Email** button. Click on this button to re-send the invoice.



Invoice

Bill To: Voula Costa
159 Penny Lane
Stittsville, ON
K9L2W4

Invoice No.: 1018
Date: 02/21/2019
Due Date: 03/23/2019

Name	Permit	Sale Window	Quantity	Rate	Amount
Voula Costa	Lilac: L104	Past - April Monthly	1	\$250.00	\$250.00

This is a test of the text block at the bottom of the page:

Subtotal	\$250.00
Taxes	\$32.50
Total	\$282.50

Balance Due \$282.50

Unpaid

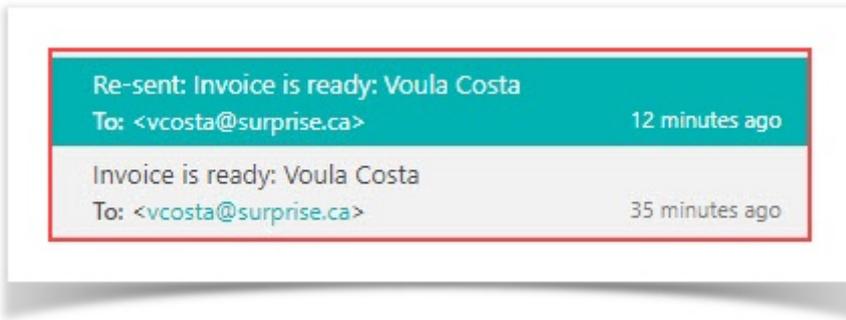
Re-send Email

Cancel

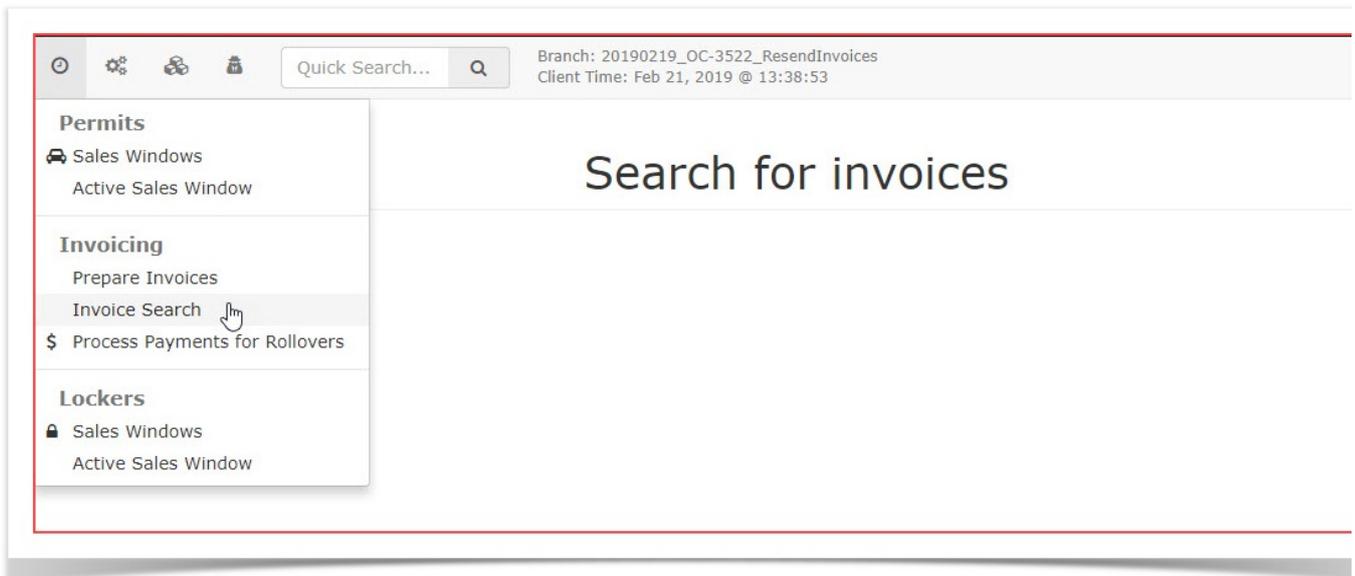
Invoice Notes?

Add Note

- The invoice will be re-sent. In the sample below there is an original invoice send as well as a re-send. Notice the email title for the re-send has a prefix added indicating this is a **Re-sent** invoice.



8. As mentioned above you can also find the invoice you wish to resend using the **Invoice Search tool**. To do so access the tool under the **Permits** menu. Hover over **Permits** and click on **Invoice Search** in the drop down menu.



9. In the search criteria window enter the **Invoice Number** in question and click search. In this case **Invoice Number 1018**.

Billed on

Up to and including

Cancelled Status

Paid Status

Invoice Number

First / Last Name

Company

Search

 Export

10. From the resulting search result click on the **Invoice Number** to access the **Invoice Preview Window**.

Search for invoices

1 records found.

Lot Lilac - Daily Reserved

#	Account	Invoice	Billing Date	Due Date	Permits	Parking	Tax	Total	Status	Processed Date
	Voula Costa	1018	Feb 21 2019	Mar 23 2019	1	\$250.00	\$32.50	\$282.50	Unpaid	Cancel

Total: \$282.50

11. The process after this point is identical to **step 6 and 7 above**.

12. The Re-Sent Invoice will look identical the original invoice format:

Re-sent: Invoice is ready: Voula Costa

2019-02-21 12:22

(2 hours ago)

Size: 3.8 KB

From: Root User <root@localhost>

To: <vcosta@surprise.ca>

[More info](#)



This invoice has been re-sent.

92 Bridge Street
Carleton Place, Ontario



Invoice

Bill To: Voula Costa
159 Penny Lane
Stittsville, ON
K9L2W4

Invoice No.: 1018
Date: 02/21/2019
Due Date: 03/23/2019

Name	Permit	Sale Window	Quantity	Rate	Amount
Voula Costa	Lilac: L104	Past - April Monthly	1	\$250.00	\$250.00
				Subtotal	\$250.00
				Taxes	\$32.50
				Total	\$282.50
				Balance Due	\$282.50

13. It is important to note that in order to print this PDF document you should follow these next steps
14. You must first navigate to the aforementioned email where you will find an attachments link circled below

Invoice is ready: Voula Costa

2019-03-19 15:45

(13 minutes ago)

Size: 220 KB

[Attachments \(1\)](#)

From: <support@parkadmin.com>

To: <justin@tomahawk.ca>

[More info](#)

HTML HTML Source Text Raw Analysis Check HTML

92 Bridge Street
Carleton Place, Ontario



Invoice

Bill To:	Voula Costa 159 Penny Lane Stittsville, ON K9L2W4	Invoice No.:	1021
		Date:	03/19/2019
		Due Date:	04/18/2019

15. After opening the attached PDF file you will be brought to the file opened in the web browser.

Invoice1021.pdf

1 / 1

92 Bridge Street
Carleton Place, Ontario



Invoice

Bill To:	Voula Costa 159 Penny Lane Stittsville, ON K9L2W4	Invoice No.:	1021
		Date:	03/19/2019
		Due Date:	04/18/2019

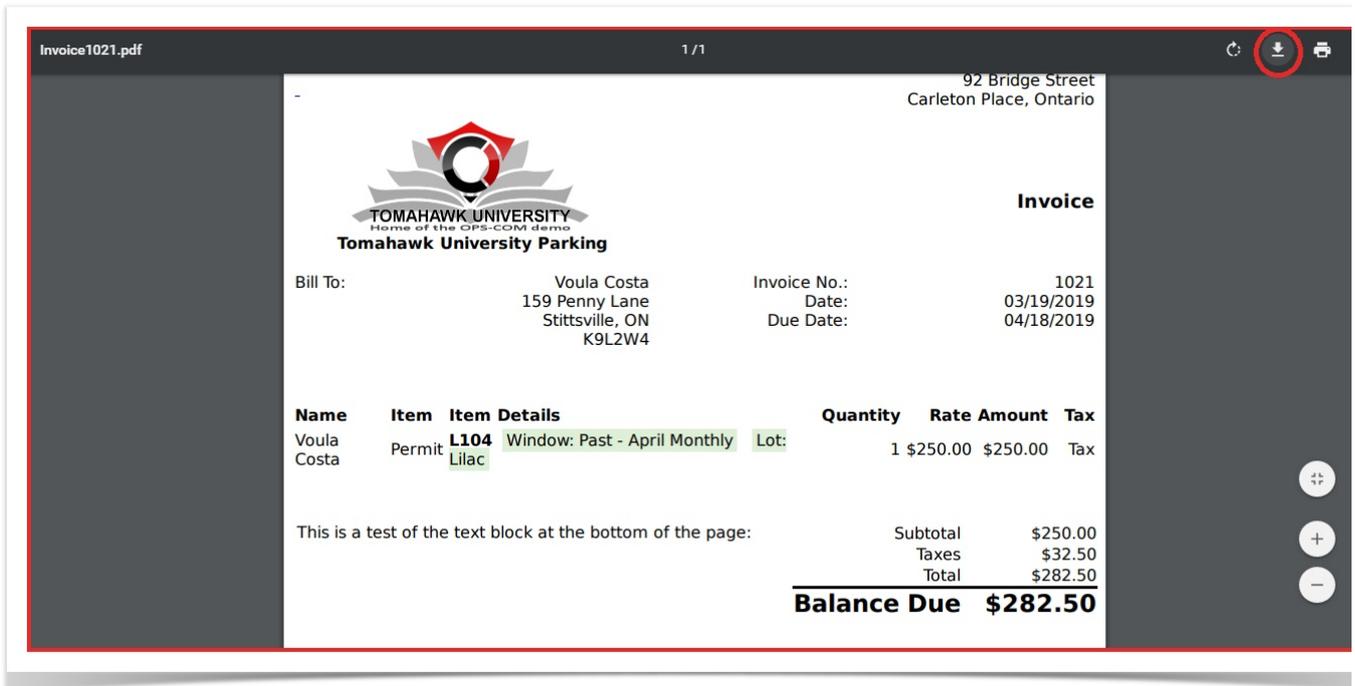
Name	Item	Item Details	Quantity	Rate	Amount	Tax
Voula Costa	Permit	L104 Window: Past - April Monthly Lilac	1	\$250.00	\$250.00	Tax

This is a test of the text block at the bottom of the page:

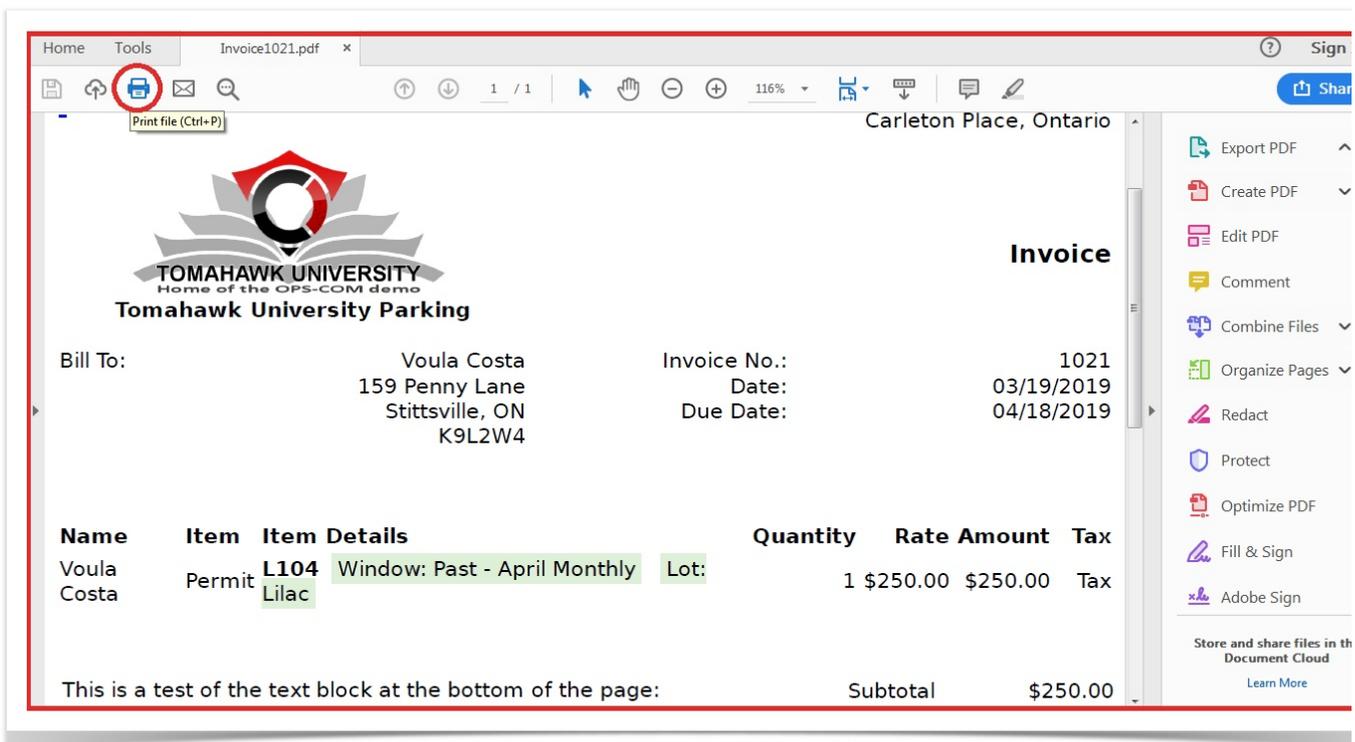
Subtotal	\$250.00
Taxes	\$32.50
Total	\$282.50

Balance Due \$282.50

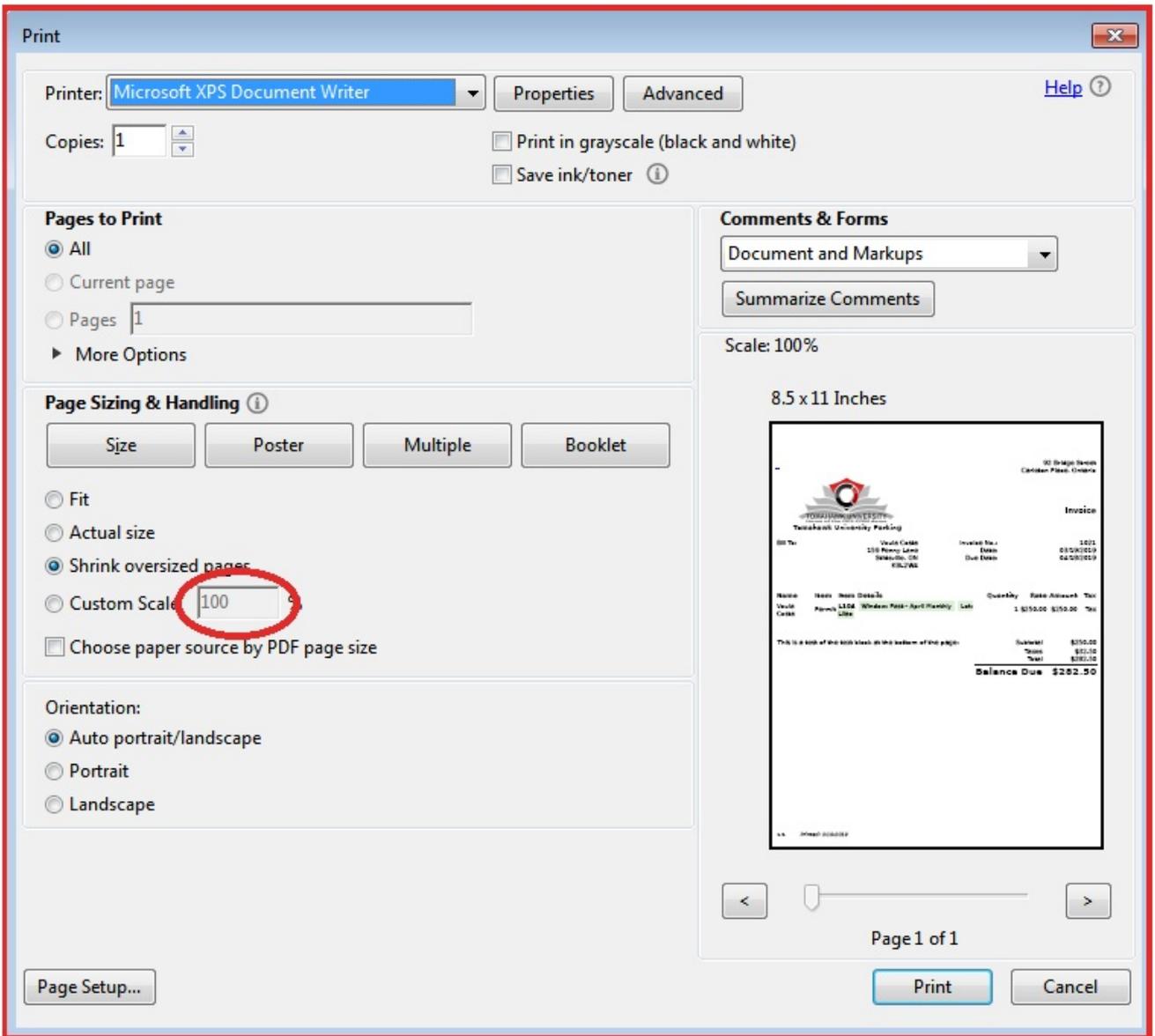
16. If you print form here you will receive a cut off version of this PDF. In order to prevent this you should download the file by pressing this button:



17. Save it to your preferred location and open it with the PDF reader of your choosing



18. From here you just print the invoice like you would a normal document ensuring that the print scale is set to 100%



Revision #2

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