

Setup payments with Flex Dollars

This article describes the Flex Dollar and Payroll Deduction feature, a specialized payment method for handling partial payments with credits. This feature allows your users to apply a pre-defined amount of **flex dollars** towards a permit purchase, with the system automatically notifying administrators of the remaining balance to be processed via payroll.

OPSCOM Support Configuration ▣

The **Flex Dollar Payment** feature is a *custom development*, tailored specifically for one client, Trent University. It is not intended to be useful to, or available to all clients. Its availability is controlled by specific configurations set up by an OPSCOM Support team member.

This feature requires configuration by an administration of your system, and must also be enabled by an OPSCOM support team member before it can be used. The setup involves defining the selectable flex dollar amounts, setting the notification email, and assigning the payment type to the appropriate users.

This feature is enabled by a system-level setting that is typically configured by OPSCOM support upon request. Once enabled, you may proceed with the steps below.

Configuration and Functionality ▣

1. To enable flex dollars, hover over **System Configuration**, and click **System Settings**.
2. Click **Permits**.
3. Enable the checkbox beside **Enable Flex Dollars**.

Configure Email Notifications ▢

An email address must be configured to receive a notification internally and each time this payment method is used (and the details of the transaction for accounting).

1. Hover over **System Configuration, Payments** and click **Manage Flex Dollars**
2. In the **Flex Dollars Alert Email** text box, enter an email address you will be monitoring.

This email address must be monitored for any changes to be made to student flex dollar balances.

Define Flex Dollar Amount ▢

Create the specific flex dollar values that users can select during checkout.

1. Hover over **System Configuration, Payments**, and click **Manage Flex Dollars**.
2. Click the **Add New** button.
3. Enter a **Label**. This is the text the user will see in the drop-down menu (e.g., "Apply \$100 of Flex Credit").
4. Enter the corresponding numeric **Value** (e.g.,).
5. Click **Save**.

6. Repeat this process for all the pre-determined flex dollar amounts your organization offers.

Assign Payment Method to User Types ▢

Finally, this payment method must be enabled for the specific user types who are permitted to use it.

1. Hover over **System Configuration, Users**, and click **User Types**.
2. Select the user type you wish to grant access to (e.g., Staff).
3. In the user type settings, assign the **Flex Dollars/Payroll Deduction** payment option.
4. For detailed instructions, please refer to the [User Types Administration wiki article](#).

Using this Feature ▢

Once configured, the feature provides a streamlined workflow for users and a clear notification process for administrators.

User Purchase Workflow ▢

1. An eligible user adds a standard term permit to their shopping cart.
2. On the checkout page, they select **Flex Dollars/Payroll Deduction** as the payment method.
3. A new drop-down menu appears, populated with the flex dollar **Labels** you configured.
4. The user selects an amount and completes the transaction. Their permit is considered valid and is issued immediately.

Administrator Workflow (Post-Purchase) ▢

1. Upon successful purchase, an email is automatically sent to the address configured in "**Flex Dollar Alert Email**" field.
2. This notification contains the key information needed for manual processing:
 - User's Name and Contact Information
 - Permit Details
 - Flex Dollar Amount Applied
 - Remaining Balance Due
3. Your administrative team (e.g., Payroll or Parking department) uses this information to confirm users flex dollar balances the remaining balance via your organization's internal payroll system.
4. For auditing purposes, a note detailing the flex dollar amount is also automatically added to the users transaction payment record.

The payroll deduction component is **not an automated process** and **neither is the updating of Flex Dollar balance**. The system's function is to calculate and report the remaining payroll deduction balance to administrators.

Best Practices & Considerations

- This payment option will **only appear to eligible users when their cart contains only standard permits**. It will not be available if other items, such as violation payments or locker rentals, are also in the cart.
- **Use clear and descriptive labels** for the flex dollar amounts (e.g., "Use \$75 Payroll Credit"). This transparency is key to reducing user confusion and support requests during the checkout process.

- **Ensure the staff who manage payroll are aware of this workflow** and understand how to act on the email notifications. Clear internal communication is critical to the success of this feature.
 - **External Verification & Reconciliation:** It is critical to understand that OPSCOM does not verify real-time flex dollar balances with any external system. Administrators are solely responsible for independently verifying the spent flex dollar amounts with their HR/payroll department and managing any discrepancies or adjustments outside of the OPSCOM system.
Note: this type of payment is treated as a full, successful payment. The system does not have split-payment logic or backend validation of flex balances beyond recording the user's chosen amount.
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