Setup payments with Flex Dollars

> The Flex Dollar and Payroll Deduction feature allows administrators to offer a specialized payment method for handling partial permit payments with internal credits. Its primary purpose is to enable users to apply a pre-defined amount of flex dollars towards a permit purchase, automatically notifying administrators of the remaining balance to be processed via internal payroll. This article is intended for OperationsCommander (OPSCOM) administrators responsible for financial configurations and custom payment workflows.

Setup and Configuration

This feature requires both a system-level activation and specific internal configurations to function properly.

Admin Side: Administrators must have the appropriate system role permissions enabled to access the system settings, payments, and user configuration menus.

User Side: Eligible end-users interact with this feature directly on the checkout page of the user portal, provided their cart meets the specific criteria for flex dollar usage.

> The Flex Dollar Payment feature is a custom development tailored specifically for limited use cases. It is enabled by a system-level setting

> that is typically configured by OPSCOM Support upon request. Please contact support to have this feature activated for your environment before proceeding with the configuration steps below.

Enabling the Feature

1. Hover over **System Configuration** and click **System Settings**.
2. Click **Permits**.
3. Enable the **Enable Flex Dollars** checkbox.

Configuring Email Notifications

An email address must be configured to receive internal notifications with the details of the transaction each time this payment method is used. This email address must be actively monitored for any changes or updates to student flex dollar balances.

1. Hover over **System Configuration**, click **Payments**, then **Manage Flex Dollars**.
2. Enter an actively monitored email address into the **Flex Dollars Alert Email** text box.

Defining Flex Dollar Amounts

You must create the specific flex dollar values that users are permitted to select during checkout.

1. Hover over **System Configuration**, click **Payments**, then **Manage Flex Dollars**.
2. Click the **Add New** button.

3. Enter the descriptive text the user will see in the drop-down menu into the **Label** field (e.g., Apply $100 of Flex Credit).
4. Enter the corresponding numeric amount into the **Value** field (e.g., 100.00).
5. Click the **Save** button.
6. Repeat this process for all the pre-determined flex dollar amounts your organization offers.

   Archiving (Deleting) Options: To prevent users from selecting outdated credit amounts, click the **Delete** button next to any flex dollar entry. If the entry has linked transaction records, the system will automatically **archive** it rather than deleting it. The entry is then removed from the active list and hidden from end-users on the checkout page.

Assigning the Payment Method

This payment method must be explicitly enabled for the specific user types permitted to use it.

1. Hover over **System Configuration**, click **Users**, then **User Types**.
2. Select the specific user type you wish to grant access to (e.g., Staff).
3. Assign the **Flex Dollars/Payroll Deduction** payment option in the user type settings. Detailed instructions can be found on the *User Types* page.

Using this Feature

Once configured, this feature provides a streamlined purchasing workflow for users and a clear notification process for your administrative or payroll teams.

User Purchase Workflow

1. Add a standard term permit to the shopping cart on the user portal.
2. Select **Flex Dollars/Payroll Deduction** as the payment method on the checkout page.
3. Select the desired credit amount from the populated drop-down menu of configured flex dollar labels.
4. Complete the transaction. The permit is considered valid and is issued immediately upon checkout.

Administrator Workflow (Post-Purchase)

1. Receive the automated transaction email sent to the address configured in the **Flex Dollars Alert Email** field. This notification contains the user's name, contact information, permit details, flex dollar amount applied, and the remaining balance due.
2. Utilize this emailed information to independently confirm the user's flex dollar balances and process the remaining balance via your organization's internal payroll system.

> For auditing purposes, a note detailing the applied flex dollar amount is automatically added to the user's transaction payment record. However, the payroll deduction component and the updating of actual flex dollar balances are **not automated processes**. The system's primary function is to simply calculate and report the remaining payroll deduction balance to administrators for manual processing.

Best Practices and Considerations

- **Understand cart restrictions: This payment option will only appear to eligible users when their cart contains only standard permits.** It will not be available as a selectable payment method if other items, such as violation payments or locker rentals, are also present in the cart.
- **Use clear descriptive labels: Use clear and descriptive labels for the flex dollar amounts.** Applying transparent nomenclature like "Use $75 Payroll Credit" directly reduces user confusion and support requests during the checkout process.
- **Train your payroll staff: Ensure the staff who manage payroll are fully aware of this workflow and understand how to act on the email notifications.** Clear internal communication is critical to the success of this manual process.
- **Acknowledge external verification requirements: 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 or payroll department and managing any discrepancies outside of the system.
- **Understand system payment logic: This type of payment is treated by the system as a full, successful payment.** OPSCOM does not currently utilize strict split-payment logic or backend validation of flex balances beyond recording the user's chosen deduction amount.
- **Archive retired dollar amounts:** Use the Delete button to clear old flex dollar options from your active list. This keeps your administrative

view manageable and prevents end-users from seeing or selecting expired credit amounts during checkout.

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