Payments, Permits & Parking Reports

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Detailed Permit Sales Report by Lot

> The Detailed Permit Sales Report by Lot provides a granular view of permit transactions categorized by specific parking areas. Its primary purpose is to help administrators audit sales volume per lot and export individual permit records for external financial data analysis. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

This report is a standard feature within the reporting module and requires no specialized system setup to run. However, administrators must have the appropriate reporting and financial viewing permissions assigned to their user role to access this page and generate the data.

Using this Feature

Administrators can use this report to audit permit distributions and accurately review financial intake across different physical locations.

> This report is the recommended tool for administrators who need to understand exactly what was sold and which specific lots those sales are attributed to.

Generating the Report

1. Hover over **Parking Management**, click **Reports**, and select **Detailed Permit Sales Report**.
2. Enter the desired date range in the search fields to define the reporting period.

3. Click the **List Payments** button to generate the data on screen.

Key Information Displayed

The report displays data in two primary sections to help balance granular detail with high-level overviews:

- **Lot Specific Payment Details:** Groups transactions by lot. If an invoice contains multiple permits, each permit is displayed as an individual line item to ensure accurate lot-level tracking.
- **Summary by Lot:** Located at the bottom of the report, this section aggregates the total sales amounts for each lot within the selected date range.
- **Data Columns:** Includes specific payment details, permit types, and invoice associations for every transaction.

Available Actions and Buttons

- **Export to Excel:** Click the Excel icon or the **Export to Excel** button to download the raw data. This is useful for performing complex summations or creating custom pivot tables outside of the system.

Best Practices and Considerations

- **Track accurate quantities: To determine the exact number of permits sold within a specific timeframe, export the report to Excel and use the Sum function on the permit line items.**
- **Understand invoice transparency: Keep in mind that one line item represents exactly one permit.** If a user purchased three permits on a single invoice, they will appear as three separate lines in this report to ensure the lot-specific data remains accurate.

- **Reconcile regularly: Use the Summary by Lot section as a quick reference to cross-check total revenue against your financial deposits for specific parking zones.**

Permit Sales by Lot by Month

> The **Permit Sales by Lot by Month** report provides OperationsCommander (OPSCOM) administrators with a detailed breakdown of permit revenue and volume. It allows users to analyze sales performance for specific months, categorized by parking lot and payment method.

Setup & Configuration

This report is a standard feature of the **Permit Management** module. No additional configuration is required to enable the report, provided the administrator has the necessary permissions to access **Reports**.

Instructions for managing the lots that appear in this report can be found on the Lot Administration page.

Using this Feature

The **Permit Sales by Lot by Month** report is used to track financial trends and volume across different parking areas within a specific timeframe.

1. Hover over **Permit Management** and click **Reports** then **Permit Sales by Lot by Month**.
2. Select the desired month from the **Month** drop-down menu.
3. Select the desired year from the **Year** drop-down menu.
4. Click the **Retrieve** button to generate the report.

Key Information Displayed

- **Lot Name**: The specific parking lot or zone associated with the sales.

- **Payment Type**: The method used for the transaction (e.g., **Credit Card**, **Payroll Deduction**, etc.).
- **Amount**: The total monetary value of permits sold, formatted as currency.
- **Sold**: The total count of individual permits sold within the selected parameters.

Available Actions & Buttons

- **Copy**: Copies the current table data to the clipboard.
- **CSV**: Exports the report data into a Comma Separated Values file.
- **Excel**: Downloads the report as an .xlsx spreadsheet.
- **PDF**: Generates a portable document format version of the report.
- **Print**: Opens the system print dialog to create a hard copy of the data.

Best Practices & Considerations

- **Reconcile regularly** by comparing the **Amount** column against your financial processor reports to ensure all **Payment Types** are being recorded correctly.
- **Use the Export features** to archive monthly data, as this provides a helpful historical snapshot for year-over-year growth analysis.
- **Verify Lot names** periodically in *Lot Administration* to ensure that the data remains organized and easy for accounting teams to interpret.

Permit Sales Report

> The Permit Sales Report allows administrators to generate a customizable summary of permit transactions based on specific user and allocation types. Its primary purpose is to help track revenue, monitor permit distribution trends, and audit both active and historical sales over a defined date range. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

This report is a standard feature within the Permit Management module and requires no specialized system setup to run. However, administrators must have the appropriate reporting and permit management permissions assigned to their user role to access the page and generate the data.

Using this Feature

Administrators can use this tool to filter and review permit sales data based on specific operational parameters and export the results for external analysis.

Generating the Report

1. Hover over **Permit Management**, click **Reports**, and select **Permit Sales Report**.
2. Select the desired user types and allocation types from the provided lists to include in the report.
3. Enable the **Show archived sales** checkbox if you want the report to include historical data, such as released or switched permits.

4. Choose the desired timeframe using the start date and end date calendar fields.
5. Click the **Create Report** button to generate the data, which will display directly below the search criteria.

> When selecting user or allocation types from the list menus, you can quickly highlight multiple non-consecutive options by holding the **Ctrl** key (or **Cmd** on Mac) on your keyboard while you click.

Key Information Displayed

Once generated, the report displays a data table summarizing the permit sales that match your selected criteria. This provides a quick on-screen review of the total transactions, grouped by the parameters you defined in the search fields.

Available Actions and Buttons

- **Create Report:** Click this button to execute your search query and populate the data table on the screen.
- **View Details in Excel:** Click this button to export the generated data into a spreadsheet for external formatting and granular financial analysis.

Best Practices and Considerations

- **Audit historical transactions: Always enable the Show archived sales checkbox when conducting comprehensive financial audits.** This ensures that permits that were sold but subsequently released or switched are still accurately accounted for in your overall revenue reconciliation.

- **Leverage Excel exports: Organizations should use the View Details in Excel feature for complex data manipulation.** While the on-screen table provides an excellent quick overview, exporting the raw data allows administrators to build custom pivot tables and cross-reference sales with external accounting software seamlessly.

Active Permit Report

> The Active Permit Report provides administrators with a comprehensive overview of all currently valid parking permits within the system. Its primary purpose is to help staff audit permit distribution, verify active revenue streams, and monitor permit lifecycle statuses. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

There are no specific configuration steps required to enable this report, as it is a core system feature. However, administrators should ensure that User Types and Allocation Types (lots) are correctly defined within the system to guarantee the filtering options return accurate data.

Instructions for these configurations can be found on the *Pricing and Lot Admin* and *User Management* pages.

Using this Feature

Administrators can use this report to filter and view active permits based on specific user types, lots, and date ranges.

Generating the Report

1. Hover over **Parking Management**, click **Reports**, and select **Active Permit Report**.
2. Select the user types and allocation types you want to include in the report from the provided lists. Hold the Ctrl key on your keyboard while clicking to select multiple items simultaneously.

3. Enable the **Show Archived** checkbox if you wish to include sales that are no longer active, such as permits that have been released or switched.
4. Choose a **Start Date** and **End Date** to define the timeframe for the permit records.
5. Click the **Search** button to generate the results.

> The Active Permit Report reflects real-time data. If a permit is cancelled or expires during the business day, it will immediately move from the active list to the archived list.

Key Information Displayed

Once the search is executed, the report populates a table below the search criteria containing the following data points:

- **User Name and ID:** Identification of the permit holder.
- **Permit Number:** The unique identifier for the specific permit.
- **Vehicles:** The vehicle license plate(s) associated with the active permit.
- **Lot/Allocation:** The specific area where the permit is valid.
- **Effective and Expiry Dates:** The duration of the permit's validity.
- **Status:** Indicates if the permit is currently active or archived.

Available Actions and Buttons

- **Search:** Click this button to execute your search query and populate the data table on the screen.
- **Export:** Click this button to download the displayed report details into an Excel (.xls) file for further data analysis or sharing.

Best Practices and Considerations

- **Audit archived data regularly: When troubleshooting permit history, always enable the Show Archived checkbox** to see the full paper trail of a user's previous permit switches or releases.
- **Ensure date range precision: Always ensure your Start Date and End Date align exactly with your organization's fiscal or academic terms** when running reports for specific billing cycles to avoid counting overlapping permits.
- **Use multi-select efficiently: Use the Ctrl click method to run reports across multiple lots at once.** This is highly useful for comparing the density of active permits between different campus zones.

Company Permit Report

> The Company Permit Report allows administrators to quickly generate a list of permits assigned to specific corporate entities or business accounts. Its primary purpose is to help track company-issued parking allocations, audit active sales windows, and export data for external billing. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

The Company Permit Report is a standard reporting feature within the permit management module and requires no specialized system setup to run. However, administrators must have the appropriate reporting and permit management permissions assigned to their user role to access this page. Ensure that company accounts and their associated permits are accurately configured within the system to yield reliable search results.

Using this Feature

Administrators can use this report to filter corporate permit data by date range or specific company name, and then export the results for spreadsheet analysis.

Accessing and Running the Report

1. Hover over **Permit Management** and click **Reports** then **Company Permit Report**.
2. Filter the report by entering specific dates in the **Processed On** or **Active On** date fields.

3. Enter the name of the specific organization you are looking for in the **Company** text box (e.g., "Jones Windows").
4. Enable the **Show archived permits** checkbox to include historical, expired, or inactive permits in your search results.
5. Click the **Search** button to execute the query and display the results on screen.
6. Click the **Export** button to download the generated report as a .CSV file for use in external spreadsheet software.

> When filtering your search dates, note that the **Active On** field specifically represents the date that the permit sales window is active for, rather than the date the permit was processed by the system.

Available Actions and Buttons

- **Search:** Click this button to run the report based on your selected date, company, and archive parameters.
- **Export:** Click this button to instantly create a .CSV file of your on-screen results for external record-keeping or financial auditing.

Best Practices and Considerations

- **Leverage exports for corporate billing: Organizations should use the Export feature to generate .CSV files when invoicing corporate clients.** This provides a clean, easily manipulated spreadsheet of all active permits currently billed to a specific company account for a given month or semester.
- **Audit archived permits:** Use the **Show archived permits** checkbox annually to review historical company permit usage. This data can help

forecast future parking demand for your corporate clients and assist in negotiating future lot allocations.

Temp Permit Sales Report

> The Temp Permit Sales Report allows administrators to review temporary permit sales data within a specified date range, categorized by parking lot. Its primary purpose is to help staff track revenue and temporary permit usage across different locations for auditing and reconciliation. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

No special setup is required to generate this report, as it relies entirely on the existing configuration of your organization's parking lots and temporary permit offerings. However, administrators must have the appropriate reporting and financial viewing permissions assigned to their user role to access this page.

Using this Feature

Administrators can generate this report to view high-level summary data across all properties, with the ability to drill down into lot-specific transactional details.

Accessing the Report

1. Hover over **Parking Management** and click **Reports** then **Temp Permit Sales Report**.
2. Select the desired timeframe using the **Start Date** and **Up To and Including** calendar pickers.
3. Click the **Payment As** drop-down menu and choose the payment status to filter by (e.g., Processed, Not Processed, or Any).

4. Click the **Search** button to generate the report.

Key Information Displayed

Once generated, the system displays a summary of temporary permit sales for each lot that had activity within the selected timeframe.

Summary Report Data:

- **Lot Name:** The name of the parking lot where temporary permits were sold.
- **Total Permits:** The total number of temporary permits sold for that lot.
- **Total Amount:** The total revenue generated from temporary permit sales for that specific lot.

Detailed Report Data (By Lot):

- **Permit No:** The unique permit number assigned to the transaction.
- **Username:** The account profile name of the purchaser.
- **Amount:** The financial cost of the permit.
- **Date:** The date the permit sale occurred.
- **Type:** The duration the permit is valid for (e.g., a specific number of hours, or 'daily' for a full day).
- **Pay Method:** The specific method of payment used during checkout.
- **Processed Date:** The date the payment was officially processed.
- **Vehicles:** The license plate number associated with the temporary permit.

Available Actions and Buttons

- **Magnifying Glass:** Click this icon located beside a specific lot's name on the summary page to navigate to the detailed report, which lists every individual temporary permit transaction for that location.
- **CSV**, **Excel**, **PDF**, **Print:** Click any of these export buttons located at the top of the report to download or print the on-screen data in your preferred format.

> The export buttons are available on both the high-level summary screen and the lot-specific detailed screens. Ensure you are viewing the exact data level you wish to export before clicking the download buttons.

Best Practices and Considerations

- **Reconcile finances regularly:** Organizations should use this report on a regular weekly or monthly basis to reconcile temporary permit sales against overarching financial records.
- **Utilize data granularity:** Export the main summary report for high-level administrative overviews, but always click the Magnifying Glass icon to investigate the detailed transactional data when auditing discrepancies within specific lots.

Lot Value Report

> The Lot Value Report provides a real-time snapshot of permit utilization across all parking lots. Its primary purpose is to help administrators understand current lot occupancy and calculate the total value of all active permits currently assigned to their facilities. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

The Lot Value Report is a standard reporting feature within the permit management module and requires no specialized system setup to run. However, administrators must have the appropriate reporting and permit management permissions assigned to their user role to access this page.

Using this Feature

Administrators can use this report to view live data reflecting the exact moment the report is generated. Because it tracks currently active permits rather than historical sales transactions, the figures will continually fluctuate as permits expire or are newly issued.

Accessing the Report

1. Hover over **Permit Management**, click **Reports**, and select **Lot Value Report**.
2. Review the data on the **Lot Usage** screen, which displays a breakdown of permit distribution.
3. Click the **Export to Excel** button if you require the data for further manipulation or external reporting.

Key Information Displayed

- **Rented:** The number of permits currently assigned to users within that lot. This includes all active permits, such as administrative, internal, complimentary, or temporary permits, regardless of whether a financial transaction occurred.
- **Total Available:** The maximum capacity or total number of permits allocated for that specific lot.
- **Utilization:** The relationship between rented permits and total capacity, expressed as a percentage.
- **Total Value:** The cumulative value of all active permits currently assigned to the lot.

Best Practices and Considerations

- **Avoid using this report for financial audits: Do not use this report for financial auditing of monthly sales.** Because this report counts non-revenue permits (like internal or special access permits), the rented count will often be higher than the totals found in revenue-specific financial reports.
- **Answer capacity inquiries: Use this report to answer capacity questions.** This is the primary tool for administrators to definitively answer exactly how many permits are currently assigned to a specific lot at any given moment.
- **Save historical data manually: Export data regularly if you need to track utilization trends over time.** The system does not automatically store historical "snapshots" of this specific utilization screen.

Active Deposit Report

> The Active Deposit Report provides a comprehensive overview of all security deposits currently held within the system. Its primary purpose is to help staff track outstanding funds, identify orphaned deposits without active permits, and manage financial rollovers during sales cycles. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

While the Active Deposit Report is a standard system feature, its accuracy depends on proper permit type configuration and financial mapping.

1. Hover over **Permit Management** and click **Lot Administration**.
2. Verify that permit types requiring a deposit have a value populated within the **Deposit Amount** field.
3. Ensure that your financial department has established a General Ledger (GL) code specifically for deposit accounts to allow seamless reporting between OPSCOM and your external accounting software.

Using this Feature

Administrators can use this report to audit current liabilities and ensure that deposits are appropriately refunded, consumed, or renewed when a user’s parking status changes.

Accessing the Report

1. Hover over **Parking Management** and click **Reports** then **Active Deposit Report**.

2. Review the resulting **Deposit Report By Lot** screen. Deposits are grouped by lot; a deposit belongs to its active permit’s lot, or its original permit’s lot when it has no active permit.

Filter Options and Search Criteria

- **Created Date (From - To):** Filters based on when the deposit record was originally created.
- **Processed Date (From - To):** Filters based on when the deposit's payment was processed. Only deposits with a processed payment in this range are listed.
  - *Note:* Leaving both date fields empty removes date constraints and displays all records.
- **Lot:** A scrollable list allowing you to select **All Records** or specific facilities organized under headings (such as **Active** lots). A deposit is listed under its active permit’s lot, or its original permit’s lot if no active permit exists.
- **Paid Status:** Dropdown with options for **All Records**, **Only Paid Records**, and **Only Unpaid Records**.
- **Current Permit State:** Dropdown with options for **All Records**, **Only deposits with no current permit**, and **Only deposits with valid permits**.

Autofills (Quick Filter Presets)

- **Deposits by Month:** Automatically populates the **Processed Date** range with **last month's dates** to report on deposits processed last month.
- **Find Deposits Needing Action:** Automatically sets the **Current Permit State** filter to Only deposits with no current permit and clears

date fields to instantly query deposits requiring staff attention.

Key Information Displayed

On-Screen Results Table

Results are grouped into separate collapsible cards by Lot, showing the lot name, item count, and subtotal amount. The table includes the following columns:

Column	Description
Deposit	The deposit type.

Column	Description
Original Permit	The initial permit number the deposit was tied to.

Column	Description
ActivePermit	The user's current valid permit number.
Amount	The monetary deposit value held.

Column	Description
UserName	Clickable link leading directly to the user profile.

Column	Description
ConfirmCode	Payment confirmation transaction code (blank if unpaid/unprocessed).

Column	Description
CreatedDate	Date and timestamp when the deposit record was generated.

Column	Description
Processed Date	Date and timestamp when payment was finalized.

Additional Fields in Excel Export

When clicking **Export to Excel**, the spreadsheet includes additional administrative details not shown directly on screen:

- **Account Number**
- **First Name & Last Name**
- **User Type**
- **Pay Method**
- **Current Lot**

Visual Cues and Status Indicators

- **Yellow Highlighting:** Indicates deposits that have been rolled over to a new permit cycle but have not yet been fully processed or reconciled.
- **Red Highlighting:** Indicates "orphaned" deposits where the user no longer has an active permit associated with the funds, or the sales window has closed without action.

Available Action and Button

When a user finishes parking or a permit expires, administrators must manage the physical deposit through the user's profile using one of the following actions:

- **Refund:** Click this button if the user is finished parking and the deposit item (e.g., physical gate key, transponder, or hangtag) is returned in good standing. This returns the original amount paid back to the user.
- **Consume:** Click this button when the user is finished parking but the deposit funds are being retained by the organization (e.g., the item was lost, damaged, or not returned).
- **Renew:** Click this button when a user intends to continue parking but their original deposit was forfeited due to damage or loss. This closes out the previous record and requires a new deposit payment for the upcoming permit period.

> Consuming a deposit does not trigger a refund or generate a new charge. It simply moves the funds from a "held" status to an "earned" status for your organization.

Best Practices and Considerations

- **Audit regularly: Perform regular monthly audits of the Active Deposit Report to identify orphaned deposits** (highlighted in red) and ensure your liability accounts match your physical inventory.
- **Establish timeframes: Organizations should establish a clear business rule for the timeframe in which a deposit must be claimed.** For example, outline a policy where a deposit is automatically consumed if a permit has been expired for more than 30 or 60 days.
- **Check hardware: Always verify the physical condition of hardware (transponders, fobs, or keys) before clicking the Refund button** to prevent financial loss to the organization.
- **Document actions: Document the reason for consumption in the User Notes section** of the user profile whenever a deposit is retained to provide a clear, historical audit trail.

Student Permit and Postal Export

> The Student Permit and Postal Export is a reporting tool that allows administrators to extract a list of student permit records alongside the users' postal code data for a specified date range. Its primary purpose is to help organizations analyze student commuting demographics and geographical parking trends by exporting the data directly to a spreadsheet. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

This report is a standard feature within the Permit Management module and requires no specialized system setup to run. However, administrators must have the appropriate reporting and permit management permissions assigned to their user role to access the page and generate the export. Ensure that postal code fields are set as mandatory during your student registration process to ensure the resulting report is populated with accurate data.

Using this Feature

Administrators can use this tool to quickly generate an Excel spreadsheet containing the requested permit and location data.

Generating the Report

1. Hover over **Permit Management** and click **Student Permit and Postal Export**.
2. Enter the desired timeframe into the start date and end date fields on the Student Permit and Postal Code Report page.

3. Click the **Create Report** button to automatically generate and download the data as an Excel spreadsheet.

Key Information Displayed

The exported Excel spreadsheet will contain a compiled list of student user data corresponding to the selected date range, specifically focusing on the intersection of their active permit information and their registered home postal or ZIP code.

> Unlike some other system reports, the Student Permit and Postal Export does not generate a preview table on the screen. Clicking the **Create Report** button will immediately process the request and download the `.xls` file directly to your local computer.

Best Practices and Considerations

- **Analyze Commuter Data: Use this report prior to the start of a new semester to understand where your student parkers are commuting from.** This geographic data can be highly valuable when planning alternative transportation initiatives, adjusting lot allocations, or targeting specific regions for parking availability communications.
- **Maintain Clean Data:** The value of this export relies entirely on accurate user profiles. If your organization allows users to register without a valid postal code, the resulting spreadsheet will contain blank fields. Consider reviewing your user profile configuration to make address fields mandatory.

Subscription Verification Report

> The Subscription Verification Report automatically identifies users who have stored credit card information but are not enrolled in the automated permit rollover subscription. Its primary purpose is to provide administrators with a centralized view to proactively engage with these customers, encourage subscription enrollment, and streamline future permit renewals. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

Accessing and running the Subscription Verification Report requires specific administrator permissions. If you do not have access, you must update the permissions for your administrative role.

1. Hover over **System Configuration**, click **Admin Management**, and select **Manage Roles**.
2. Locate the specific role you want to update (e.g., Permit Manager or Billing Admin) on the Manage Administrator Roles page.
3. Click the **Permissions** button next to that role.
4. Click the **Parking** tab, which is represented by a car icon.
5. Enable the **Access Subscription Report** checkbox.
6. Click **Save Permissions**.

Using this Feature

Administrators can use this report to view the list of eligible customers and quickly navigate to their profiles to assist with subscription enrollment.

Accessing the Report

1. Hover over the **Permits** icon and click **Subscription Verification Report**.

> As soon as you click the menu item, the report will load automatically, displaying the list of customers who have stored credit card information but lack an active permit rollover subscription.

Available Actions and Buttons

- **Username**: Click the hyperlinked username to navigate directly to that customer's profile page. This allows you to quickly view their details, access contact information, and enroll them in the rollover subscription.
- **CSV**, **Excel**, **Copy**, **Print**: Click the respective export buttons located on the report page to save the data for offline use, copy it to your clipboard, or print the report for further analysis.

Best Practices and Considerations

- **Integrate the report into your permit renewal workflow: Run this report approximately a month before permit expirations to identify users for targeted outreach.** Proactively contacting customers who are ideal candidates for automated permit rollovers can significantly improve renewal rates and overall customer satisfaction.
- **Ensure data compliance: Always ensure any outreach or data usage complies with your organization's privacy policies and relevant financial regulations.** When utilizing the contact information gained from the customer profile link, be sure your communications adhere to all local data protection guidelines.

- **Run the report regularly:** Make it a habit to check this report frequently during peak sales windows to keep your data current and ensure you are addressing all relevant customers promptly.

Payroll Deduction Report

> The Processed Payroll Deduction Report provides administrators with a comprehensive list of all permit payments processed using the payroll deduction method. Its primary purpose is to generate a formatted file that can be submitted to an organization's finance or payroll department for processing. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

No specific configuration is required to access this report. However, the payroll deduction payment option must be enabled and configured within your system for transactions to appear in this list.

For detailed instructions on enabling payment options, please refer to the *Managing Payment Types* page.

Using this Feature

Administrators can use this report to view all processed payroll deductions, review individual transaction details, and export the compiled data for the finance department.

Accessing the Report

1. Hover over **Payments** and click **Processed Payroll Deduction**.
2. Review the refreshed page, which displays a list of all processed payroll deduction transactions.

Key Information Displayed

The report table includes the following key details for each transaction:

- **User Information:** Displays the **Username**, **Staff Name**, **Staff ID**, and **User Type**.
- **Permit & Location Details:** Displays the assigned **Parking Lot**.
- **Process Date:** The date the transaction was recorded in the system.
- **Total:** The total permit amount to be deducted via payroll.
- **Flex Amount:** Displays the flex dollar portion applied to the transaction (if enabled).
- **Confirm Code:** The unique confirmation code assigned to the transaction record.

> If your organization has flex dollars enabled, a separate column will be added to the report. It displays the portion of the transaction, if any, that was paid for using a user's flex dollar balance. Refer to the *Flex Dollars* page to learn more about whether this feature may be useful for your workflow.

Available Actions and Buttons

- **Transaction Number:** Click a specific, hyperlinked transaction number in the list to navigate directly to the full transaction details screen for that payment record.
- **Generate Excel Report:** Click this button located at the top of the report to download the complete list of processed deductions in an Excel (.xlsx) file, formatted for easy submission to a payroll department.

Best Practices and Considerations

- **Establish a submission schedule: It is crucial to establish a clear and consistent schedule for generating and submitting this report to your organization's finance or payroll department.** Aligning on a submission deadline (e.g., two days before the payroll cutoff) ensures that all deductions are processed in the correct pay cycle and helps avoid payment discrepancies.
- **Mind the Flex Dollars column: When flex dollars are in use, the amount in the Transaction Amount column represents the final value to be deducted after the flex dollar payment has been applied.** Ensure your payroll department understands this distinction to avoid incorrect deductions.
- **Establish a communication protocol: Designate a clear point of contact within your team for the finance or payroll department** to reach out to if they have questions or find discrepancies in the report. This ensures issues are resolved quickly and efficiently.

Invoiced Permits Report - Billing Summary by Date by Lot

> The Permit Invoice Management feature allows administrators to locate, review, re-send, and export billing records for user permits. Its primary purpose is to help staff efficiently manage financial transactions, track revenue generated by specific parking lots, and assist users who require a duplicate copy of their receipt. This article is intended for OperationsCommander (OPSCOM) administrators.

Setup and Configuration

This feature is a standard component of the permit and financial management modules and requires no specialized system setup to operate. However, administrators must have the appropriate financial, reporting, and user management permissions assigned to their user role to search for invoices and trigger email communications.

Using this Feature

Administrators can use this tool to search for specific billing records, export financial data, or re-send lost invoices directly to a user's email.

Searching for an Invoice

1. Hover over **Allocations** and click **Invoice Search**.
2. Enter a specific invoice number or select a date range using the provided calendar fields on the Search for Invoices screen.
3. Enable or disable the checkboxes to include or eliminate canceled and paid invoices from your search parameters.

4. Click the **Search** button to generate the results.
5. Click a specific invoice number from the generated list to open a preview of the invoice that will be sent to the client.

Exporting Invoice Data

1. Perform an invoice search using a specified date range.
2. Click the **Export** button or the Excel icon above the search results to download the report. This will generate a spreadsheet displaying the revenue for the selected date range grouped by lot.

Re-Sending an Invoice

Administrators can re-send an invoice if a client requests a second copy or mistakenly deleted the original email. This can be done via the user's profile or the global invoice search tool.

Method A: From the User Profile

1. Search for the user using their last name and click their username to access their profile.
2. Hover over **History** and click **All Records** to access the list of the user's transactions.
3. Locate and click the specific invoice number you wish to re-send.
4. Click the **Re-Send Email** button located on the invoice preview screen.

Method B: From the Invoice Search

1. Hover over **Permits** and click **Invoice Search**.
2. Enter the specific invoice number into the search criteria window and click the **Search** button.

3. Click the invoice number from the search results to access the preview window.
4. Click the **Re-Send Email** button.

> When an invoice is re-sent using either method, the system automatically adds a prefix to the subject line of the email. This visual cue helps both the user and the administrator quickly identify that the message is a re-sent copy rather than a new charge.

Printing an Emailed PDF Invoice

If a user or administrator needs to print the physical PDF copy of an emailed invoice, specific steps should be followed to prevent formatting errors.

1. Navigate to the email containing the invoice and click the attachment link.
2. Click the **Download** button to save the file to your local computer, rather than viewing it in the web browser.
3. Open the downloaded file using a dedicated PDF reader application.
4. Print the invoice document, ensuring the print scale in your settings is set to 100%.

Best Practices and Considerations

- **Avoid browser printing: Always download the PDF invoice before printing it.** Printing directly from a web browser's built-in PDF viewer frequently results in cut-off margins, missing text, and scaling issues.

- **Verify contact information: Always verify that the email address on the user's profile is current and accurate before clicking the Re-Send Email button.** If the original invoice was lost because the email address was outdated, the re-sent copy will also fail to deliver until the profile is updated.
- **Leverage exports for revenue tracking: Use the date range search and Excel export function at the end of a billing cycle** to quickly reconcile lot-specific revenue against your primary accounting software.