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 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.

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