

Adjustments

The Transaction Adjustments feature allows OPS-COM administrators to modify the financial balance of an existing transaction by adding a charge or applying a partial reimbursement. Its primary purpose is to correct payment discrepancies or issue partial credits without canceling the entire transaction. This guide is intended for OPS-COM administrators responsible for financial processing and user account management.

Setup and Configuration

Making a transaction adjustment is a core administrative function that requires no additional system setup. It is accessed entirely through the individual user's profile within the administrative portal.

Using this Feature

Administrators can initiate an adjustment directly from the transaction record. Adjustments can be made before a transaction is completed or after the payment has been processed.

Step-by-Step Instructions

1. Verify you are working in the correct user profile by checking the name displayed in the top right-hand corner of the screen.
2. Open the **Transaction Details** screen for the specific item you need to modify.

3. Click the **Adjust** link located on the transaction record to open the adjustment window.
4. Enter your internal organization's **Requisition Code** in the associated field, if applicable.
5. Set the amount sign to positive to charge the user an additional amount, or change the amount sign to a negative to apply a reimbursement.
6. Enter the specific dollar amount of the adjustment.
7. Enter a detailed explanation in the comments field to document the reason for the financial change.
8. Click the **Add Adjustment** button at the bottom of the screen. You will be returned to the **Payment Details** screen, and the new adjustment will be listed below the original transaction.
9. Click the **Not processed** link next to the new entry to open the adjustment verification window.
10. Verify that all adjustment details and amounts are correct.
11. Click the **Process this Adjustment** button at the bottom of the screen to finalize the change.

The adjustment process does not release items back into the system inventory. If an item (such as a permit or locker) needs to be released and made available for another user to purchase, it must be done separately using the system's refund or release functionality.

Visual Cues and Status Indicators

- **Payment Status:** Once the adjustment is processed, the status line will automatically update from **Not processed** to **Submitted**,

accompanied by a date stamp. This indicates the adjustment has successfully altered the dollar amount associated with the item.

Best Practices and Considerations

- **Always provide detailed comments when creating an adjustment record.** A clear justification is critical for maintaining an accurate and transparent financial audit trail for future reviews.
 - **Organizations should establish clear guidelines on when to use an adjustment versus a full refund.** Adjustments are ideal for partial credits, whereas full refunds are necessary when reversing an entire transaction.
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