

Feature Overview - Rollover/Renew Permits

Permit rollovers, also referred to as **renewals**, describe the process of transitioning an existing permit from its current, expiring validity period to a subsequent, new sales window. This procedure effectively establishes a new duration for which the permit remains valid and involves the requisite charge for this extended period.

This is crucial for maintaining continuous parking access for patrons, especially those on payroll deduction or with credit cards on file that can be automatically charged. It's designed to manage active permits from a current sales window into a future sales window, establishing a new duration for which the permit remains valid and involving the requisite charge for this extended period.

For instance, consider a monthly permit holder. Their permit is initially configured within a January sales window, granting validity from January 1st to January 31st, at a cost of \$100 for the month. In late January, this permit can be rolled over into a February sales window. This action sets the permit's new valid period from February 1st to February 28th, with an additional charge of \$100 applied to the permit holder for the month of February.

The rollover process in OPSCOM involves several key steps and configurations:

- **Sales Window Setup:** Before any rollover can be performed, ensure your new sales window has a start date equal to or greater than the end date of the previous sales window.
- **Permit Renewal Initiation:** Administrators use the Permit Renewals utility to select which sales windows and user types will be included in the rollover.
- **Permit Selection & Exclusions:** Administrators can review and select specific lots and even individual permits to include or exclude from the rollover process.
- **Payment Processing:** For users with payment subscriptions (payroll deduction, EFT, credit card) set up, payments can be processed automatically as part of the rollover.
- **User Notifications (Implicit):** While not explicitly detailed as a setup, users with payment subscriptions can have their payments processed automatically, implying a streamlined experience. Users who need to make manual payments will be required to do so to secure their permit.
- **Prevention:** Both administrators and users have options to prevent specific permits from rolling over.

To ensure a smooth permit rollover, you'll need:

- A new sales window set up correctly. [Refer to the Sales Window wiki article](#) to learn more.
- Permits marked as renewable in the previous sales window.

Before attempting rollovers, please follow the steps in these wiki articles to ensure you have activated the correct Sales Window and that you have your information correctly set up for automatic payments.

For parkers with subscriptions, automatic payments can be processed as part of the rollover. This applies to patrons who pay by payroll deduction or credit card.

For Credit Card Payments: For automatic credit card processing on rollover, the user must have a valid credit card registered in the system, and it must be set as their **Prime Credit Card**. Note that your payment gateway must allow direct charging of client cards; this won't work with hosted payments only.

Automatic Permit Payments on Rollover/Renewal

Parkers with subscriptions setup in their account

Patrons who pay by payroll deduction or through credit card purchases can also have their payments processed automatically as part of the rollover process.

Performing Permit Rollovers

To begin a rollover:

1. Hover over **Permits** (Clock icon) and click **Sales Window**.
2. Click the **Rollover** button to open the **Permit Renewal** page.

Before a rollover can be performed you must make sure that the new sales window you are rolling into has a start date that is equal to or greater than the end date of your previous sales window.

Select Rollover Options

1. From the permit Renewal window select the current sales window you are rolling over **from** (From Sales Window) on the left side of the form.
2. Then select the Sales Window you wish to roll the permits into. In our example we are rolling permits from the October Sales Window to the November Sales Window.
3. Select what user types we wish to roll over, or simply leave it as the default of **All User Types**.
4. Click on **Show Lots** to list all lots that can be rolled over in the selected Sales Window. The list of lots will appear below the search form.

Managing Individual Permits for Rollover

You can choose to include or exclude specific permits from the rollover.

1. To see the list of permits you can toggle for renewability, click either the **Holders** or **Renewing** button.
2. A list of permits in that lot will appear, allowing you to toggle whether they should be renewable or not. For example, if permits STAFF1000 and STAFF1001 are not renewing, they shouldn't roll over.
3. Click **Update Permits** to save your changes.

From Sales Window: Started - Monthly October - Sep 26, 2022

To Sales Window: November 2022 - October 24, 2022

User Types: Public (ADA User, New User, Public User, Resident 1, Resident 2, VeritasComm), Staff (Company Executive, Company Staff, Contractor)

Show Lots

Select Sale Windows → Select Lots → Process Renewals

Monthly Lot	Holders	Renewing	Blocked	Renewed	Not Renewing	Not Renewing but Exists
Company Staff lot	5	5	0	0	0	0
Moore Street (lot)	3	0	0	2	1	0
The Bicycle Lot 1	1	0	0	0	1	0

Search

Total Permits: 5 | Requested: 0 | Rented/Reserved: 5 | Visible To User: 0 | Visible To Admins: 0 | Unavailable: 0

Email Listed | Mailing List | Status Report | Copy | CSV | Excel | PDF | Print

Show 100 entries | Search:

#	Lot	Cost	Availability	Renewability	User Type	Usage State	State
STAFF1000	-CSL [M] Company Staff lot	\$30.00	Available	<input type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1001	-CSL [M] Company Staff lot	\$30.00	Available	<input type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1002	-CSL [M] Company Staff lot	\$30.00	Available	<input checked="" type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1003	-CSL [M] Company Staff lot	\$30.00	Available	<input checked="" type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good
STAFF1004	-CSL [M] Company Staff lot	\$30.00	Available	<input checked="" type="checkbox"/> Renewable	Company Staff	Rented Release Switch	Good

Showing 1 to 5 of 5 entries | Previous | 1 | Next

Update Permits | Reset Page

6. Click **Update Permits** to save your changes.

Here's the logic for permit rollover states:

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Renewing	True	False	False	Neither the user, nor the permit exists but the current perm is set to be renewed.

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Blocked	True	False	True	<p>The permit exists in the target sale window, but the user doesn't. This means anywhere for any permit in the lot. If the user has multiple permits and some of them renewed, then they technically are not blocked. If the user has been given a different permit, they also are not blocked.</p>

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Renewed	True	True	N/A	The user is considered renewed when they exist in the target sale window. Just like the note for blocked, it's not intended to be good for users with multiple permits.
Not Renewing	False	False	N/A	The user was not found in the target sale window and their permit is also not renewing. This is the expected scenario.

State	Current Permit Renewing (prevent rollover = 0)	User exists in target Sale Window	Permit exists in target Sale Window	Notes
Not Renewing, but Exists	False	True	N/A	The user was found and their permit not renewing. This could use some investigation to make sure that the user is supposed to have that permit or not.

Once you've completed this process for all lots you want to include in the rollover, click **Renew Permits** to continue. The screen will refresh and update the permit counts. Permits you toggled for rollover will appear as rolled over, while those marked as not renewing will remain in the "Not Renewed" column and will be available for new users.

[Show Lots](#)

Select Sale Windows →
 Select Lots →
 Process Renewals

Monthly Lot	Holders	Renewing	Blocked	Renewed	Not Renewing	Not Renewing but Exists
<input checked="" type="checkbox"/> Company Staff lot	<input type="text" value="5"/>	<input type="text" value="3"/>	0	0	<input type="text" value="2"/>	0
<input checked="" type="checkbox"/> Moore Street (lot)	<input type="text" value="3"/>	0	0	<input type="text" value="2"/>	<input type="text" value="1"/>	0
<input checked="" type="checkbox"/> The Bicycle Lot 1	<input type="text" value="1"/>	0	0	0	<input type="text" value="1"/>	0

Permit Renewal / Rollover Changes

The next screen will renew all permits in the selected lots where possible. If there are permits that will not be renewed, please update the renewable state of each permit prior to this.

Clicking any of the buttons above to show the permits within that lot to make any changes needed.

[Export Users](#) [Renew Permits](#)

Permit Processing

The system automatically rolls over permits paid through gateway payment types like Mastercard, Visa, or Payroll Deduction. Users whose permits are rolled over but don't have an active payment subscription will need to make a payment to secure their permit. These Parkers will see the permit show up in their cart on the User Portal as unpaid. However, if a user has a [payment subscription set up](#), their permit will be rolled over, and the payment will be processed automatically.

The **Process Payment** option will be automatically toggled on, and the **Credit Card Type** will appear for users whose payments can be processed automatically. **If someone isn't continuing to park in a lot, simply uncheck the corresponding checkbox under **Rollover** to exclude them.**

Click **Rollover Permits** to complete the process. Remember, you'll need subscriptions set up for payroll deductions, EFT, or credit card payments. You can prevent permits from rolling over by setting their renewable flag.

Exporting Users to Rollover

After clicking the **Rollover Permits** we can also choose to export an excel spreadsheet of all the users that are associated with the lot we have selected. To do this we click **Export Users** on the **Permit Rollover** page.

Branch: testing
Client Time: Jan 7, 2020 @ 11:49:47

Permit Rollover

From **Yearly 2019** → To **Yearly 2020**

This is for rolling active permits from the current active sales window to the selected future sales window.

User Type(s) --- All User Types ---

Active Sales Window Type Yearly

Lot to roll over After 4PM

Export Users

Confirm Rollover

This will open a new window that generates the excel document for us to open depending on the browser you are using. You may be warned that the file is corrupt in some way however you should still be able to view the output in Excel's protective view.

Automated User Notifications

To streamline the renewal experience and reduce manual support inquiries, OPSCOM now includes automated email triggers that fire upon the completion of the rollover task.

User-Facing Notifications

When the system task processes the rollover, users are automatically notified based on the outcome of their transaction. These templates can be customized via the **Email Templates** page:

- **Payment Success:** If the payment (Credit Card, Payroll, etc.) is successful, the user receives a confirmation email along with their digital receipt.
- **Payment Failure:** If a payment is declined (e.g., expired card, insufficient funds), the user receives a failure notification advising them of the error so they can take manual action to secure their permit.
- **Audit Trail:** A record of these emails is associated directly with the user's account profile, allowing administrators to verify communication history if a patron claims they were not notified.

Administrative Alerts for Email Failures

In the event that a user's permit is processed but they have an **invalid or missing email address**, the system ensures the administrator is kept in the loop.

The administrator who initiated the rollover will receive a summary email containing a list of all users who did not receive their receipts or alerts. This administrative digest includes:

- **Direct Links:** Clickable links to the affected user accounts.
- **Transaction Details:** Links to the specific payments via confirmation codes for quick reconciliation.

Important Technical Notes

- **Task Processing Delay:** Please note that the rollover action is executed by a background system task. Emails are not sent the instant you click the button; there will be a short delay between clicking **Rollover Permits** and the dispatch of the success/failure notifications.

Tips for a Smooth Rollout

1. **Configure Templates:** Before performing your next rollover, visit the **Email Templates** page to update the wording for the two new permit renewal templates.
2. **Verify Admin Email:** Ensure your administrator account has a valid email address, as this is where the "Failure to Deliver" summary will be sent.
3. **Check Payment Gateways:** Remember that automatic credit card receipts only trigger if your payment gateway supports direct charging (as opposed to hosted-only payments).

Related Video

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