Permit Invoicing

> The Permit Invoicing feature allows administrators to generate, manage, and distribute billing statements for permit purchases to companies and individual users. Its primary purpose is to streamline financial operations by automating invoice creation and email delivery based on active sales windows. This article is intended for OperationsCommander (OPSCOM) administrators responsible for financial processing and corporate account management.

Setup and Configuration

Before generating invoices, administrators must configure the system's baseline invoice settings and ensure companies and users are properly flagged to receive billing communications.

Configuring Invoice Settings

1. Hover over **System Config** and click **System Settings**.
2. Locate and open the **Payments** menu option.
3. Set your desired starting invoice number.
4. Verify that your permit invoice template is fully configured on the system templates page.

Setting Company Invoice Contacts

1. Hover over **User Management** and click **Companies**.
2. Enter the necessary search criteria to locate the target company.

3. Click the **Edit** button next to the company information.
4. Enter the recipient email addresses into the **Invoice Emails** field. You can add multiple recipients by separating the addresses with a colon (:) or a comma (,).

Configuring Users for Invoices

Users must be designated correctly within their profiles to receive invoices, whether they are part of a company or acting as an individual.

- **For Company Members:** Open the user's profile and designate them as the **Company Billing Manager**. This specific designation is strictly required to activate invoicing for that company.
- **For Individual Users:** Open the user's profile and enable both the **Individual** checkbox and the **Receives Invoice** checkbox.

Using this Feature

Once the system and users are configured, administrators can generate and send invoices in batches based on active permit sales windows.

Creating and Sending Invoices

1. Hover over **Permits** and click **Prepare Invoices**.
2. Click **prepare invoices** next to the specific sales window that has outstanding permits.
3. Review the populated list of invoices. All invoices are selected by default; toggle off any specific invoices you wish to exclude from the batch.
4. Set the **Billing Date** and **Due Date** for the invoices being processed.
5. Click **Send Invoices** to schedule the emails for delivery.

6. Click the calendar icon in the top navigation bar to monitor the status of the invoicing task.
7. Click the blue **X** button to clear the task once it displays as complete.

Key Information Displayed

When the invoice is emailed to the selected companies or individuals, it will automatically include:

- A detailed list of the users associated with the transaction.
- The specific permit numbers being purchased.
- The **Billing date**, which reflects the exact date the invoice was sent.
- The **Due date**, which reflects the deadline for the expected payment.

Best Practices and Considerations

- **Limit Billing Managers: While an organization can have multiple Company Managers, there should only be one designated Company Billing Manager** to ensure billing communications are centralized and not duplicated.
- **Determine Rollover Rules: Organizations should establish a clear business rule regarding whether unpaid permits are allowed to roll over** to the next period before configuring invoice templates and generating bills.

> Please note that currently, only permits assigned to user types other than 'Student' or 'Staff' will be shown as available for invoicing in the system.

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