Permit Search

> The Permit Search tool is a central hub for finding, managing, and reporting on all parking permits. Its primary purpose is to provide administrators with detailed search capabilities and a suite of actions for managing permit visibility, user assignments, and communications. This article is intended for OPS-COM administrators.

Setup and Configuration

This tool is a standard administrative feature and utilizes existing permit and user data within the system. It does not require any specific initial configuration.

Admin Side: Administrators do not need to configure any settings. The search page automatically populates based on your active permit inventory and user assignments.

Using this Feature

Administrators can use the following instructions to find specific groups of permits and perform a variety of bulk and individual management actions.

Performing a Permit Search

1. Hover over **Parking Management** and click **Permit Search**.
2. Enter your search criteria into the designated fields.
3. Click the **Toggle More Options** button to expand additional filters.

4. Check the **Archived Permit Data** or **Include Only Active Permits** checkboxes under the expanded options to refine your search further.
5. Click the **Retrieve** button to generate your results.

Visual Cues and Status Indicators

At the top of the search results, a legend provides a quick overview of the permits found based on their status:

- **Total**: The total number of permits found by your specific search criteria.
- **Requested**: A user is associated with the permit, but no payment has been initiated.
- **Rented/Reserved**: A payment is associated with the permit, but it may not be fully processed yet.
- **Visible To User**: The permit is available for purchase and has no user associated with it.
- **Visible to Admins**: The permit is explicitly hidden from users and has no user associated with it.
- **Unavailable**: The permit's state is not set to Good, Valid, or Usable.

Available Actions and Buttons

Administrators can perform actions on both a bulk and individual level directly from the search results page.

Bulk Actions:

1. Select a report or action from the drop-down menu at the top of the results (e.g., **Generate Mailing List**, **Generate User Usage Report**,

Send Email to Permit Users, **Generate Status Report**, **Generate Permits for Printing**).

2. Click the **Perform Selected Action** button to proceed and apply the action to all permits in the current list.

Individual Actions:

- **Permit Number**: Click the link in this column to open the **Parking Permit Information** screen, where you can manage the **Permit State** and view associated user and payment details.
- **Clock Icon (History)**: Click this icon to view the permit's complete transaction and user rental history.
- **Reserved/Rented**: Click the user's name in this column to view their details, with links to navigate to their profile or send an email.
- **Toggle Availability**: Enable or disable the checkbox in this column to control if a permit is visible to users for purchase. Use the **Mark all Available** or **Mark all Not Available** buttons for bulk changes, then click the **Update Records** button to save.
- **Release**: Click this link to disassociate the permit from its current user, making it available for resale.
- **Switch**: Click this link to initiate a Permit Switch and change the permit number associated with the current user.

Best Practices and Considerations

- **Process refunds separately: Releasing a permit does not automatically refund the user.** This action only disassociates the permit from the user. If a financial refund is required, you must also

perform a separate financial adjustment on the user's profile.

- **Understand the difference between permit statuses: Requested** means a user has selected an item but has not yet chosen a payment method. **Reserved** means there is an associated unprocessed payment (such as a promise to pay via cheque). **Rented** means the payment is fully processed and finalized.
- **Customize your workspace: Use the Toggle More Options button to pin frequently used search filters to your default view.** This simple step saves time and customizes the search page to better fit your daily administrative workflow.

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