

OperationsCommander - <https://opscom.wiki>

Rollover: Auto Selection and Automatically Processing Payments

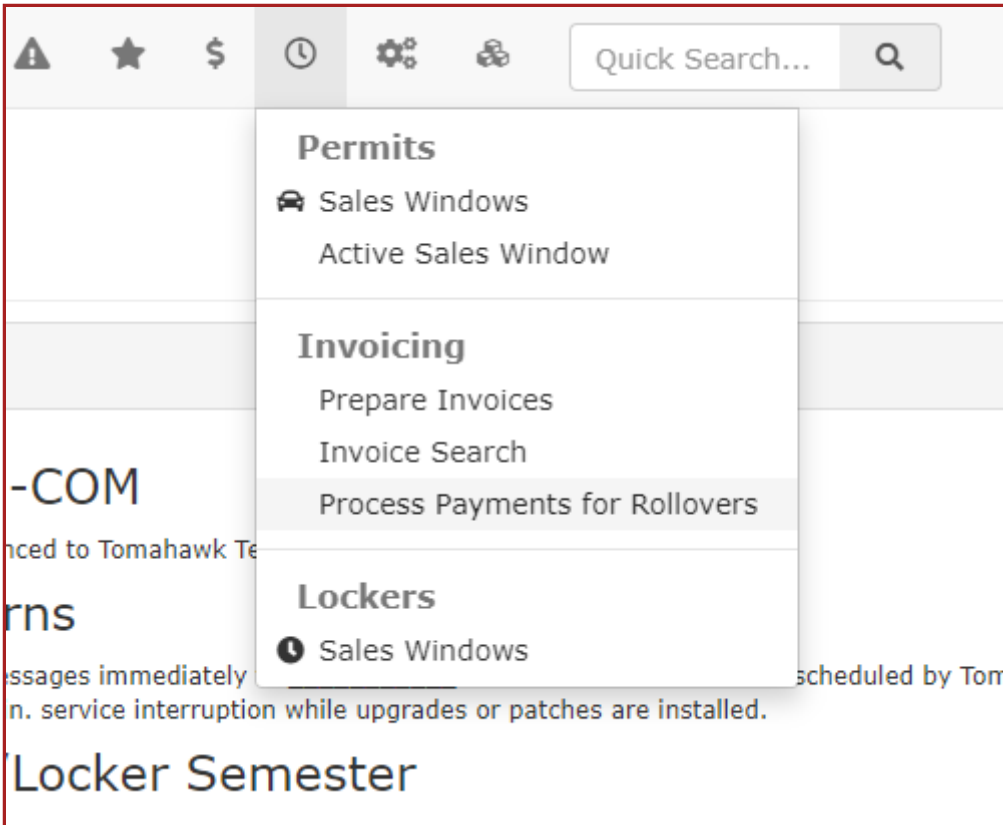
Using Credit Cards on File to Purchase Recurring Permits

There are two prerequisites to this function working correctly for credit card purchases on rollover. The user **must have a valid credit card registered in the system**, and the card must be **designated as the Prime Credit Card**.

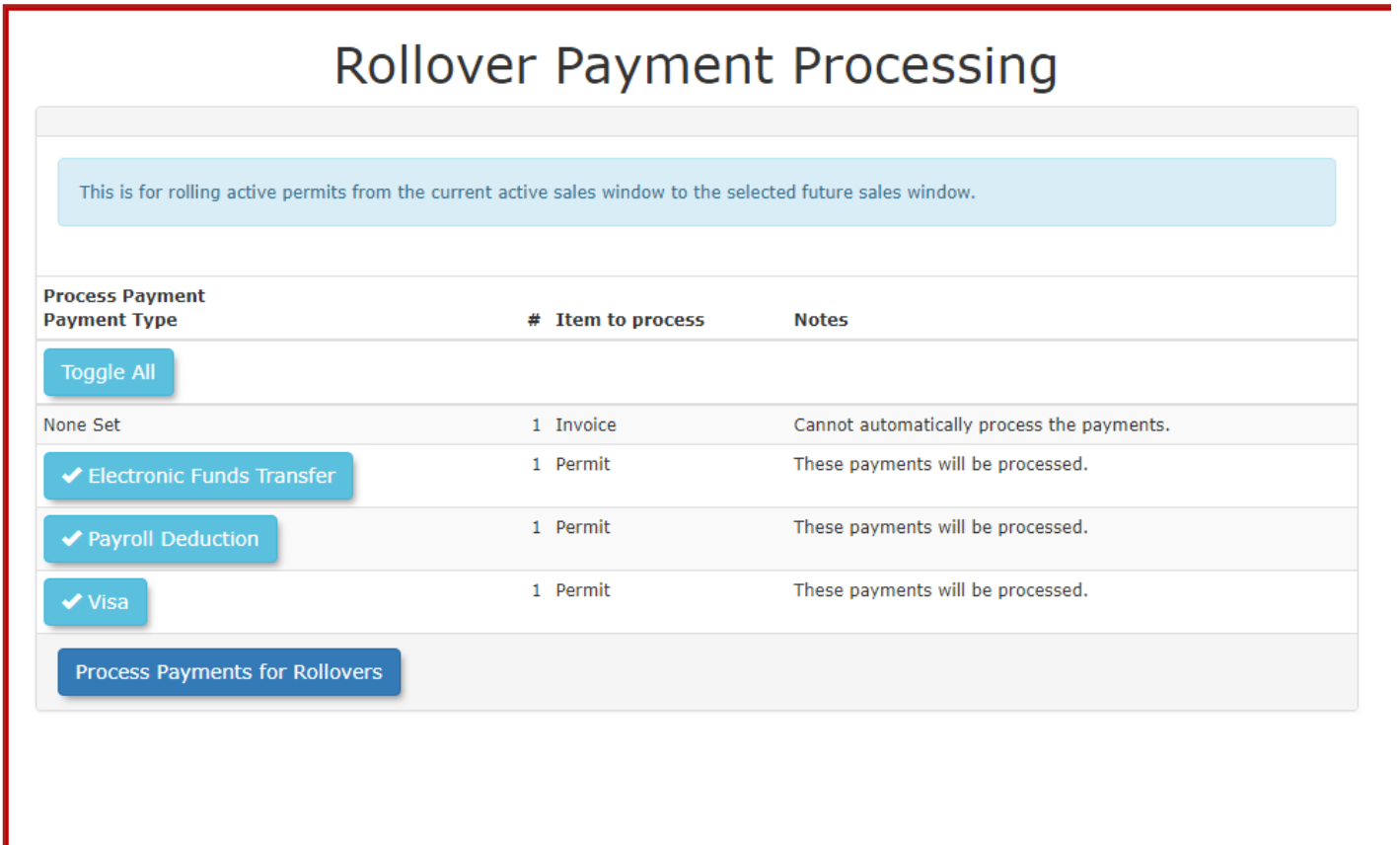
If you are accepting Credit cards that you wish to charge on rollover, you must have a Gateway that allows you to charge client cards directly. This cannot work for a system that is set for Hosted Payments only.

Performing Permit Rollovers

Hover over **Permits**, then select **Process Payments for Rollovers**.



The **Rollover Payment Processing** page will be displayed as seen in the image below.



To select which payments will be done click the check box with the payment type. If the invoice or permit says "None Set" then the user must process the payment to get the permit in the next sales window.

Rollover Payment Processing

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

Process Payment

Payment Type

Item to process

Notes

Toggle All

None Set

1 Invoice

Cannot automatically process the payments.

Electronic Funds Transfer

1 Permit

These payments will be processed.

Payroll Deduction

1 Permit

These payments will be processed.

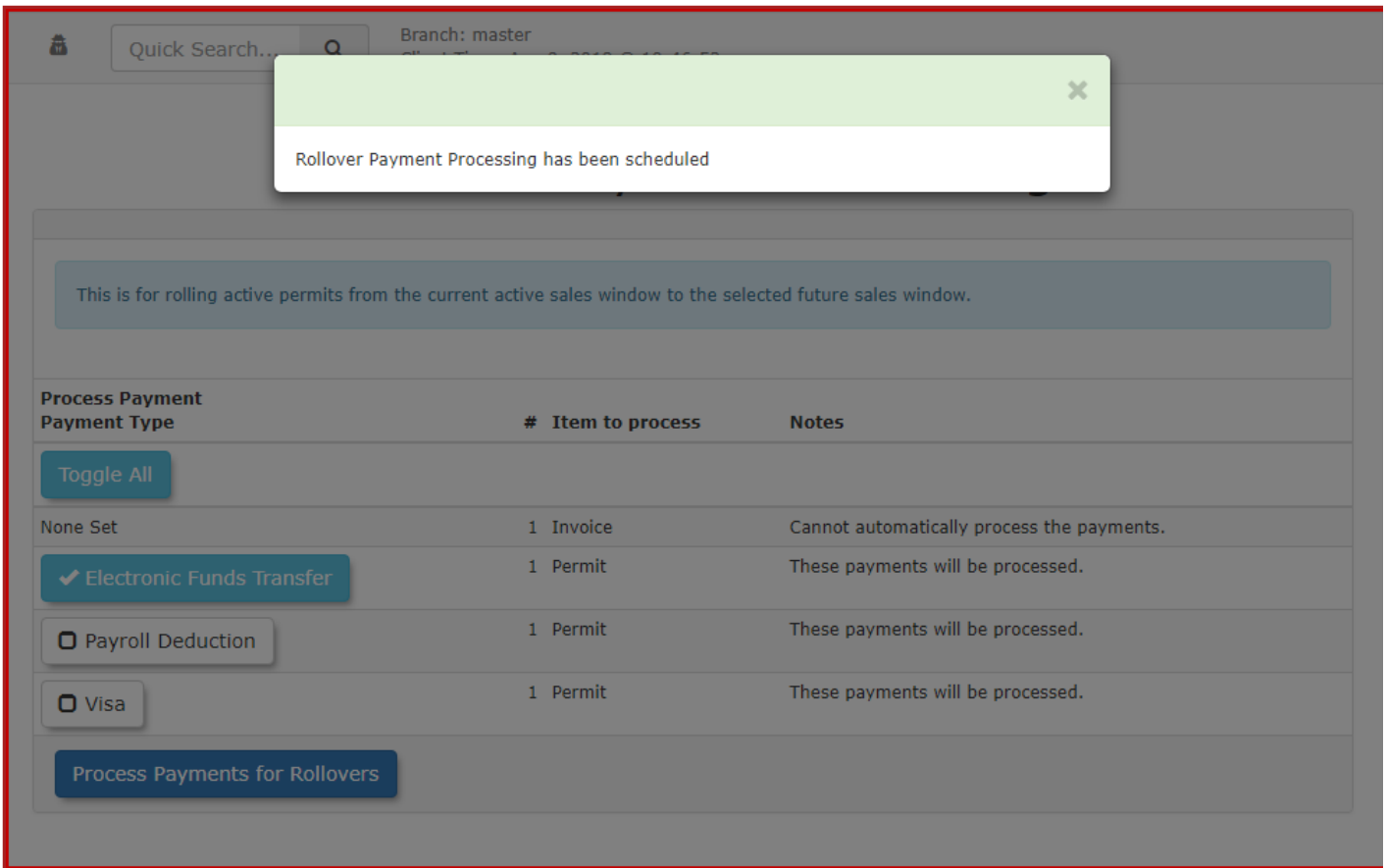
Visa

1 Permit

These payments will be processed.

Process Payments for Rollovers

Select the '**Process Payments for Rollovers**' button



Visual Cues & Status Indicators

- **Lock Pad Icon:** Displayed on the right side of the **Process Payments for Rollover** screen. This indicates that a previous payment attempt was initiated but did not reach a finalized "Paid" or "Cancelled" state, often due to a **Declined - Retry later** response from the processor.

Resolving a Locked Permit

If a permit is locked and cannot be processed through the standard rollover screen, follow these steps to clear the lock and complete the transaction:

1. Navigate to the **User Profile** of the individual associated with the locked permit.
2. Access the user's **Cart** or **Pending Items**.
3. Select the permit item that is currently locked in the rollover report.

4. Proceed to **Checkout** and manually process the payment using the user's preferred method (e.g., Credit Card, Cash, or Account Credit).
5. Verify the transaction is successful. Once the item is marked as paid in the user's account, it will automatically be removed from the locked status in the **Process Payments for Rollover** screen.

Best Practices & Considerations

A locked permit indicates an incomplete transaction. Do not attempt to re-process the payment through the rollover screen until the lock has been cleared via the user's account, as this may result in errors.

- **Monitor rollover reports monthly** to identify any lock pad icons, ensuring that all recurring permit payments have been successfully captured.
- **Investigate "Declined" messages** immediately by contacting the user to verify their credit card information or suggesting they contact their bank.
- **Redirect payment to the User Profile** when a lock occurs; manual intervention through the user's cart is the primary method for clearing a processing lock.
- **Allow for processing time** if a generic error occurs, as some records may take a short period to clear the payment gateway's communication buffer before they can be re-attempted.
- **Confirm successful payment** in the user's transaction history before attempting any further administrative actions on the permit to ensure data integrity.

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