Sending Invoices in Advance of Payment

> This process allows OPSCOM administrators to roll over active permits and issue formal invoices to users or companies prior to capturing any automated payments. This feature is essential for accommodating clients who require a generated invoice to process payments through their internal accounting departments before authorizing a transaction.

Setup and Configuration

This workflow utilizes the standard permit rollover functionality. Ensure that your target users or companies are already configured to receive invoices within their profiles before beginning this process.

Using this Feature

The process involves initiating a permit rollover, deliberately bypassing the automated payment trigger, and then manually generating the invoice for the reserved permits.

Generating Invoices During a Rollover

1. Hover over the **Permits** menu and click **Active Sales Window**.
2. Click **Rollover Users** to open the permit rollover window.
3. Deselect the preferred payment method within the wizard setup. This critical action ensures the rollover completes without automatically charging the user's saved payment profile.

4. Click **Rollover Permits**. The system will process the renewal and place the permits into an "awaiting payment" state, making them eligible for invoicing.
5. Hover over the **Payments Menu** and click **Prepare Company Invoices**.
6. Review the list of users and companies in the **Prepare Invoice** window who are now queued for invoicing.
7. Click the **Prepare Invoice** button. The system will generate an email with the invoice included in the body of the message and send it to the designated contacts.

Re-Sending an Invoice

If a client mistakenly deletes their invoice email or requests a duplicate copy, administrators can easily resend the document using one of two methods.

Method 1: Through User History

1. Search for the specific user and click their username to open their profile.
2. Hover over the **History** tab and click **All Records** to view their transactions.
3. Locate and click the specific **invoice number** to open the preview screen.
4. Click the **Re-Send Email** button. The system will dispatch a new email featuring a "Re-sent" prefix in the subject line.

Method 2: Through Invoice Search

1. Hover over the **Permits** menu and click **Invoice Search**.
2. Enter the target invoice number in the search criteria and click the search button.
3. Click the **Invoice Number** in the results list to access the invoice preview window.
4. Click the **Re-Send Email** button.

Best Practices and Considerations

- **Verify Payment Toggles: Always double-check that automated payment methods are explicitly deselected during the rollover wizard** when preparing advance invoices. Leaving this selected will result in unintended automatic charges.
- **Printing PDF Attachments:** If users wish to print the PDF version of their invoice attached to the email, **instruct them to download the file to their computer first rather than printing directly from the web browser's previewer.** Browser previews frequently cause the document margins to be cut off during printing.

> Advise users to open the downloaded PDF in a dedicated PDF reader and ensure their printer settings are configured with the print scale set to **100%**. This guarantees the invoice prints with the correct formatting and layout.

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