

Using the Basic Waitlist Report

The **Basic Waitlist Report** provides OPSCOM administrators with a centralized view of all users currently on waitlists, organized by parking lot. This report is a crucial tool for managing demand, enabling easy access to user profiles, facilitating communication, and streamlining the process of offering permits to waitlisted individuals.

Setup & Configuration

Before users can join a waitlist or their data appears in this report, waitlist functionality must be properly configured within your OPSCOM system.

Admin Side

- **Enabling Waitlists for Lots:** Instructions for enabling waitlists for specific lots can be found on the [Pricing & Lot Admin](#) page, under the **Standard Permits** section. Waitlists can be set up for individual lots or configured as grouped waitlists that cover multiple locations.
- **"Only Allow Waitlist after lot is Full" Setting:** This setting determines whether users will see the option to join a waitlist even before all permits for a designated lot are sold out, or only once the lot reaches full capacity.

User Portal

You can configure the option to allow users to see their rank on the waitlist or not. To do this, follow the steps below:

1. Hover over **System Configuration** and click **System Settings**.
2. On the **Permits** tab, find and enable the **Show Waitlist Rank** checkbox.
3. Refer to [this page to see the User Experience](#).

Using the Basic Waitlist Report

1. Hover over **Permits**, then **Waitlists**, and click **Waitlist Report**.
2. On the **Waitlist Report** screen, Administrators can view/edit details about a user waiting to purchase a permit in a specific lot.
3. This screen allows the admin to quickly see:
 - The user's Rank on the waitlist
 - The date they were added to the waitlist
 - The user's name
 - Their user type
 - Their city
 - Phone Number
 - Comments
 - The lot they are waiting for a permit in

If the record is highlighted in **blue**, the user does not currently have a permit assigned to them.

If the record is highlighted in **yellow**, the user does currently have a permit assigned but has not yet purchased it.

Available Actions & Buttons

- The **User Profile icon** allows administrators to view and edit the user's profile. This is also the primary link administrators would use if they

wanted to **sell a permit** to the user who is on the waitlist (click the **User Profile** icon and then the **Parking Tab** within their profile).

- The **Add button** allows administrators to add comments specific to the waitlist record. If a comment already exists, an **edit link** will appear, allowing administrators to update the comments on file.
 - The **Toggle Selections** button allows administrators to select all records displayed in the report simultaneously. You can also make individual record selections by enabling the checkbox to the left of each record.
 - The **Export to Excel** button exports the entire table as an Excel spreadsheet for further analysis or record-keeping.
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Best Practices & Considerations

- **Develop Business Rules:** Organizations should establish clear business rules for when to remove a user from the waitlist, such as after a user has been emailed an offer, or after a permit has been successfully purchased and processed.
 - **Proactive Management:** Regularly review the Waitlist Report to identify users who are next in line and to manage available permits efficiently.
 - **Communication:** Use the report to facilitate communication with waitlisted users, either individually or in bulk (using the export function for email lists, for example).
 - **User Experience:** If **Show Waitlist Rank** is enabled, ensure users understand what their rank means and how it might change.
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