Module 2 - User Management

Users and their profile information form the backbone of the OPS-COM software. They link all modules together and allow you to have a complete history of everything about that user and associated vehicle.

You can Add, Edit and Search for Users. You can also buy Lockers and Permits and pay for Violations through the User Profile. Merge tools and bulk email filters that allow you to reach out to your users are also available in this module.

Quick registration

This is the area that you will need when adding a User to the system. Admins can manually add users or users can be asked to log into the User Portal to create and manage their account. When using this registration form, you will be able to assign the appropriate user type and input all other relevant information. This wiki article covers the Admin registering new users.

User side Registration

For information about User Registration through the User Portal refer to Registering as a New User.

Working with Existing Users

You must search for Users before you can work with them. Once you have found a user you want to work with you click on their username in the search results. This will bring you to the user profile landing page. This is a quick reference dashboard of the user's profile information and current user history. For a complete article about this page and what you can expect, refer to the User Profile Landing Page.

From the User Profile Landing Page you can:
Edit a user profile - This is also where Admins can set up Tax Exemption information, add/edit stored credit cards, and edit payment subscriptions for a user.
View and edit associated vehicles - This allows administrators to add, edit and remove vehicles associated to a user. This is also where administrators would add/remove DNTT (Do Not Ticket or Tow) information to a vehicle.
View outstanding Violations
View active Permits

You will notice many tabs across the top of the screen. These are used to manage all aspects of the User Profile. From this page you can:

Manage Lockers for that User - You can purchase lockers for a particular user on this tab.
Purchase parking permits for that user. This includes temporary permits and access cards. You can also sell prorated permits here.
Manage Payments - The Payments tab allows administrators to process user payments for one or all payment types due (lockers, parking permits, temporary permits, access card, violations). This page also shows any financial adjustments that have been made to a user account. We will look in depth on adjustments and payments in module 8.
View User History - view/edit all transactions and adjustments (locker reservations/rentals, permit reservations/payments, violations/payments, appeals/payments, DNTT records and email records) on a user's account. You can also view the complete History of a user which is a system log of user transactions. If you have the IncidentAdmin module you will also be able to view/edit any incident history associated with a user.

Merging Users and Vehicles

The Merge Users option is used to combine two profiles for the same person into one user profile. You may require this function if:

- Person created profile in error
- Person gets married and changes their name.
- Person Profile does not match Admin created profile.

The Merge Vehicles option is used to combine two vehicles into one. It can also be used when a Vehicle has outstanding violations and a User has added the vehicle (with violations) to their account. This will associate the vehicle to the User and bring along all the violation history to the User. For more information about why vehicle duplicates occur, read this wiki article.

Using Bulk Email to Communicate with Users

If you would like to target your email to a specific group, there are many options available in the More... menu. You can also export the 'Consented Report' to allow you to see all users that have given you consent to contact them by email.

Using the Forms Module

If you have purchased the Forms module you can use it to allow users to communicate with the organization about special requests. Some examples of forms used by organizations include:

- University move in/move out
- Special Parking Requests

Administrators have the ability to create custom forms to request the information they need. Refer to this wiki article for more information.

Revision #1
Created 8 February 2024 08:46:05 by Robin
Updated 8 February 2024 08:52:43 by Robin