

Performing Permit Rollovers

When do we use this?

Permits can be rolled over from one active period to the next. In other words the admin can renew a patron's ownership of their current permit by rolling them over into the next active period whether it's a monthly, yearly or semester type permit.

Patrons who pay by payroll deduction or through credit card purchases can also have their payments processed automatically as part of the rollover process.

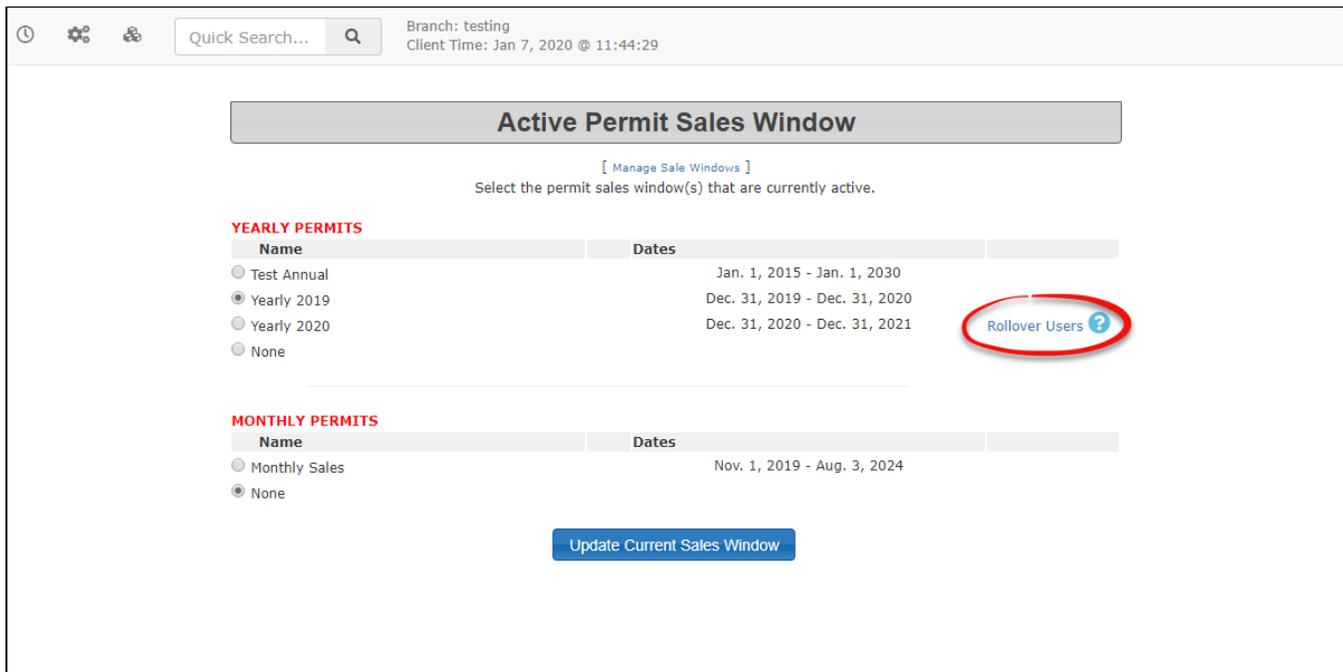
Before Attempting rollovers, please follow the steps in these wiki articles to ensure you have activated the correct Sales Window and that you have your information correctly set up for automatic payments.

Read [Sales Window Management](#) and [Credit Card Management in OPS-COM](#)

- [Exporting Users to Rollover](#)
- [Related Content](#)

Performing Permit Rollovers

To begin a rollover hover over **Permits** and click **Active Sales Window**. Click **Rollover Users** to launch the **Rollover Wizard utility**.



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Active Permit Sales Window

[Manage Sale Windows]
Select the permit sales window(s) that are currently active.

YEARLY PERMITS

Name	Dates
<input type="radio"/> Test Annual	Jan. 1, 2015 - Jan. 1, 2030
<input checked="" type="radio"/> Yearly 2019	Dec. 31, 2019 - Dec. 31, 2020
<input type="radio"/> Yearly 2020	Dec. 31, 2020 - Dec. 31, 2021
<input type="radio"/> None	

MONTHLY PERMITS

Name	Dates
<input type="radio"/> Monthly Sales	Nov. 1, 2019 - Aug. 3, 2024
<input checked="" type="radio"/> None	

[Rollover Users ?](#)

[Update Current Sales Window](#)

Important

Before a rollover can be performed you must make sure that the new sales window you are rolling into has a start date that is equal to or greater than the end date of your previous sales window.

You may perform the steps outlined in the [Sales Window Management](#) and [Credit Card Management in OPS-COM](#) articles, to show you how you can set up sales windows before performing a rollover.

At this point, we have the ability to select what user types we wish to roll over, or simply leave it as the default of **All User Types**. We can also select the lot we wish to roll over. In this example, we focus on the **After4PM Lot** where we have a single permit available to roll over.

The screenshot shows the 'Permit Rollover' interface. At the top, it indicates the rollover period from 'Yearly 2019' to 'Yearly 2020'. Below this, a light blue box contains the text: 'This is for rolling active permits from the current active sales window to the selected future sales window.' The form includes three main fields: 'User Type(s)' set to '--- All User Types ---', 'Active Sales Window Type' set to 'Yearly', and 'Lot to roll over' set to 'After 4PM'. A green 'Export Users' button is visible to the right. A dropdown menu is open for the 'Lot to roll over' field, displaying a table with the following content:

Lot Name	Existing	Rolled
Not Rolled Over		
After 4PM	1	
Red Staff Lot West		
Red Student Lot West		
Text2Park		
Has Permits Rolled Over		

The 'After 4PM' row in the table is circled in red.

With the lot selected, click **Confirm Rollover** to begin the rollover process.

This screenshot shows the same 'Permit Rollover' interface. The 'Lot to roll over' dropdown is now closed and set to 'After 4PM'. A red arrow points from the 'After 4PM' text in the dropdown to the 'Confirm Rollover' button, which is circled in red. The 'Export Users' button remains visible to the right. The top navigation bar includes a 'Quick Search...' field, a search icon, and system information: 'Branch: testing' and 'Client Time: Jan 7, 2020 @ 11:49:47'.

The screen will refresh with a list of permits available to rollover.

Note the reference at the top of the page indicating we are rolling over permits from the **Yearly 2019 Sales Window** to the **Yearly 2020 Sales Window**.

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Permit Rollover

From **Yearly 2019** → To **Yearly 2020**

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

Rollovers can be performed multiple times. If the permit already is associated to the user in the new Sales Window, it will be ignored.

Rollover	First Name	Last Name	Student No. Employ No.	Permit No.	Permit State
<input checked="" type="checkbox"/>	Michael	Ashbury	00800147	50	Good

Rollover Permits

It is important to note how the permits can be processed after or during the rollover process. The system is set up to automatically roll over permits that have been paid through **gateway payment** types such as **Mastercard, Visa, Payroll Deduction** etc.

In this example, Users will be rolled over but will need to make a payment in order to secure their Permit. However, if the user has a payment subscription setup they will be rolled over and the payment will be processed automatically.

Note that the **Process Payment** will be automatically toggled on (will be processed) as well as the **Credit Card Type** appears in the button for users that can be processed automatically. If for any reason, the person is not continuing to park in a given lot, simply exclude them from the rollover by unchecking the corresponding checkbox under **Rollover**.

1. Click **Rollover Permits** to complete the process.
2. [Refer to this wiki article](#) to process payments for these permits. You will need subscriptions set up for payroll deductions, EFT or credit card payments. [Refer to this wiki article](#) for more information.

You can prevent permits from rolling over by setting the renewable flag on the permit. For more information [refer to this wiki article](#).

Exporting Users to Rollover

After clicking the **Rollover Permits** we can also choose to export an excel spreadsheet of all the users that are associated with the lot we have selected. To do this we click **Export Users** on the **Permit Rollover** page.

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Permit Rollover

From **Yearly 2019** → To **Yearly 2020**

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

User Type(s) --- All User Types ---

Active Sales Window Type Yearly

Lot to roll over After 4PM 



This will open a new window that generates the excel document for us to open depending on the browser you are using. You may be warned that the file is corrupt in some way however you should still be able to view the output in Excel's protective view.

Related Content

- [Performing Permit Rollovers](#)
- [Permit Update API](#)
- [Permit Misuse Notification](#)
- [Temporary Permit Printing](#)
- [Using Permit Proration](#)
- [Permit States](#)
- [Setting up Zebra Sticker Printers](#)
- [Cancel Transaction](#)
- [User - Payments Tab](#)