

# Configuration Checklist

This checklist is designed to help when initially configuring OPS-COM. Consider it a checklist but when you get to the system messaging section it is advisable to consult the following detailed checklist page: [System Messaging Checklist](#)

## Some System Configuration that Must be Done

For more detail on system setting please see

### System settings:

- Check **General System Settings** to ensure Date and Time settings are correct for your location
- Check **Lockers** settings to set Tax rate, upload a locker map, and set a Receipt Reply To Address
- Check **Payments** if EFT (Electronic Funds Transfer) is configured
- Check permits to ensure it is configured correctly:
  - Enter a **Receipt Reply To Address**
  - Upload a permit map
  - If using the **Managed Waitlist** configure the **Waitlist Email Managers** as well as the **Waitlist Reservation Duration**
- Check Violations to configure the following
  - Days until violation payment is due
  - Number of days to appeal violation before the option to appeal is removed

### Classic System Settings:

- Check System Identification settings
  - System Name
  - Reply-to Admin Email Address
  - Reply-to Security Email Address
  - Mailing Address
  - Safety Address
  - Permit Tax %
  - Temp Permit Tax %

## Template Design

OPS-COM offers powerful flexibility to allow your team to customize the look and feel of your User Portal system. This is done by designing the site template. You will require your graphics and any messaging you would like to see on the pages.

For more detail on system messaging see the [System Messaging Checklist](#)

## Uploading Images for Use in Templates

- In order to place images in the different templates you must upload them to the File Manager. Please refer to this wiki article for more information
- Upload background image/s for landing page
- Upload your company Logo
- Upload your parking map

Once you have your graphics uploaded:

## Setting up the Look and Feel of the User Portal

- Setting up the common header
- Setting up the common footer
- Optional use of content header and footer

## System Messaging

- Set up your Vehicle Disclaimer
- Set up your Permit Disclaimer

## Email Template Setup

- Appeal Submitted by user
- Lost Password
- Invoice
- User Receipt
- Waitlist Selected

## User Setup

- Determine what User Types are required
- Determine what fields of the user profile are required, optional or hidden

## System Setup

- You will need to setup the Vehicle description information.
- Are there any vehicle types missing.

You will also need to setup your locations.

- Determine what locations you wish to use as descriptors for enforcement.

## ParkAdmin Setup

- Create Lots
- Create and designate Lot Groups and Zones
- Permits type: Monthly or Daily or Temp

## ViolationAdmin Setup

- Create Offence Categories
- Populate the offence types
- Configure days to pay and overdue time frame

## Proof and order your Violations stock

- Your Account Executive will be in contact to ensure you are getting the correct tickets and that you approve the design.

- If you are sourcing your own Violation stock please ensure you allow yourself 4-6 weeks to have them printed and shipped to you.

## Setup your Handhelds and Printers

If you have purchased the hardware through the OPS-COM team, we will ship them directly to you with the software pre-loaded and the printer's paired. If you have sourced them yourself, you will need to follow the instructions in the wiki articles to complete the setup of your Android handheld units. You will also need to use the instructions in the wiki articles below to setup and pair your printers.

- Using your **Google Account supplied by OPS-COM**
- Setting Up your Handheld Units for the First Time
- Setting your Android for Auto-Updates
- Ticket Creation Settings
- Setting up your Ticket Footer

## Printer Setup

Your Training Coordinator will go through using the handhelds but it is beneficial to work through the Android Handheld Wiki to make the training more meaningful for you.

In particular it is important to familiarize your self with the Best Practices for OPS-COM Android wiki article.

## Related Content

- [Templates and Design](#)
- [Editing the Landing Page Messages](#)
- [System Messaging](#)
- [Admin User Accounts](#)
- [Selecting User Profile Items](#)



### Support Agent Notes

No special notes. *If you feel any should be added, please add them here.*