Parking Tickets

Springbrook Software

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Parking Tickets Module

Overview

Summary

The Parking Tickets module is a comprehensive citation management tool. The processes included in this module allow you to record citation details, receive ticket related fines, generate past due notification letters, and initiate the collections process.

Each object in the flowchart below represents a process in the application.

PT> Collections

Processing a Collections Batch

Summary

The Collections batch process allows you to charge late fees, automatically update the status of selected parking tickets, and generate collections letters.

Step by Step

1 Create or open a collections batch in the Parking Tickets module.

- Select the Collections palette in PT> Collections. This will expand the Collections palette and display the steps of the batch process.
- Modify an existing batch or create a new Collections batch.
  - Select a batch number from the drop-down menu at the top of the Collections palette to select an existing batch.
  - Select New from the Collections batch number drop-down menu to create a new batch. This will open the **New Batch** window.
  - If there are open batches in the Collections process, you can create a new batch without affecting the open batches.

- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are for reference only. The fiscal period of the transactions in the batch is determined by the transaction date entered during the Generate step.
- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.
  - You can also manually create a new batch by entering a Batch Number and clicking the Save icon .

- Highlight the batch in the batch number drop-down menu on the Collections palette and press DELETE to delete a batch. Any uncommitted transactions in the batch will be deleted.

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2 Generate the notices.

- Open the **Generate PT Collections** window (PT> Collections> Generate).
- Check the **Fee** toggle for each fee you would like to send to collections.
  - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed Fees. All Fees are selected by default.
    - These icons can be used to select or deselect the Statuses as well.
  - Fees are created and maintained on the Fee Maintenance window (PT> Maintenance> Fees).

- Check the **Status** toggle for each status you would like to send to collections.
    - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- Specify a **Tran Date** for the Collections batch. This date will be used by the Letter and Penalty transactions created when the batch is committed.
- Specify an **Aging Date** for the batch.
    - The Aging Date is the date the system will use in conjunction with the Minimum Age and Maximum Age fields to determine which tickets are to be put into Collection status.
        - For example, if 10/15/15 was entered as the Aging Date, and 30 and 60 are entered in the Minimum/Maximum fields, all citations with a date between September 15th (30 days old) and August 16th (60 days old) would be selected to for the collections batch.
- Enter a **New Ticket Status** or click the field label to select a status from a list.
    - This is the status that will be automatically assigned to any citations included in the collections batch. This will default to the collections status specified on the PT Setup window (PT> Utilities> Setup> Collections Status field).
- The **Filter** tab is used to filter the citations that will be included in the Collections batch.
    - The **Minimum Age** and **Maximum Age** fields are used to filter the included citations by their age in relation to the Aging Date specified above.
    - The **Minimum Status Age** field is used to specify the minimum number of days that a citation must have been in its current status, such as "Past Due", in order to be included in the current collections batch.

- The **Ticket** tab is used to add specific parking tickets to the collections batch.
    - Click the Create icon to select specific parking tickets to include in the batch. This will launch the Parking Ticket Selection window.
    - Filter the displayed tickets and click the Confirm icon when you have made your selection. You can use the CTRL or SHIFT keys to select multiple tickets.
    - Manually selecting parking tickets to include in the batch will override any filtering details specified on the Filter tab.
- Click the Save icon when compete.

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3 Edit the PT Collections.

- Open the **Edit Collections** window (PT> Collections> Edit).
- The Ticket tab of the Edit Collections window displays all of the tickets that will be included in the Collections batch.
    - Click a citation number to open and edit the included ticket.
    - Highlight a ticket and click the Delete icon to remove the ticket from the batch.
- The Errors tab will display any tickets that meet the filter requirements specified in the Generate step but cannot be included in the Collections batch. The Warning Message column will display the reason that the ticket cannot be included in the batch. Tickets that meet one of the following criteria cannot be included in a

Collections batch:

  - Citation is in a pending Cash Receipts batch.
  - Citation is in another pending Collections batch.
  - Citation is in a pending Past Dues batch.
  - Citation was manually included in the Collections batch but has no outstanding balances that qualify for collections.
- Click the Save icon when compete.

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4 Print the Proof List.

- Open the **Proof List** window (PT> Collections> Proof List).
- Select a **Report Type** from the drop-down menu.
  - The Summary report will display the Name, Vehicle Year, Make, Model, Tag Number, Tag Expiration Date and Amount. The report will also include a report total and the number of printable notices generated.
  - The Detail report will display everything included in the Summary report as well as the Citation Number, Citation Date and Location for each included ticket.
- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).

- Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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5 Print the Collections Letters.

- Open the **Letters** window (PT> Collections> Letters).
- Select a **Form** from the drop-down menu. If a default form is specified on the PT Setup window (PT> Utilities> Setup> Collections Form field), that form will automatically populate and this field will not be enabled.
  - The format and information included in the Collections letters is determined by which form is selected.
  - Forms are created and maintained on the Forms Maintenance window (PT> Maintenance> Form).
- The **Tran Date** field will populate with the transaction date specified in the Generate step.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
  - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
  - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
  - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.
  - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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6 Generate the optional Collection Agency Report and Export file.

- Open the **Collection Agency Report** window (PT> Collections> Collection Agency Report).
  - The Collection Agency Report is very similar to the Collections Proof List in that it provides the general citation information for each parking ticket included in the batch.

- Select a **Report Type** from the drop-down menu.
    - The Summary report will display the Name, Vehicle Year, Make, Model, Tag Number, Tag Expiration Date and Amount for each ticket included in the batch. The report will also display a report total and the number of printable notices generated.
    - The Detail report will display everything included in the Summary report as well as the Citation Number and Citation Date.
- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).
- Open the **Collection Agency Export** window (PT> Collections> Collection Agency Export).
    - The generated export file will include the information displayed on the Collection Agency Report as well as the address information for the cited drivers.

- The export file must be in comma-separated value (.csv) format. The exported file will include the Citation Number, Citation Date, Location, Violation Description, Last Name, First Name, Address, City, State, Zip, Plate Number, Make and Amount Due for each included parking ticket.
- Click the Confirm icon when complete to create the export file.
  - You can view the progress of the export on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
- Once the export has finished processing, the **Export Settings** window will open. This window is used to specify the export path for the collections file.
  - Check the **Open** toggle if you would like to open the exported file after it is saved locally.
  - Enter the export path location and click the Save icon to export the file to the local path.

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7 Commit the Collections batch.

- Open the **Commit** window (PT> Collections> Commit).
- Click OK to commit the batch.
  - If a citation included in the Collections batch has been added to a Cash Receipts batch between the time when the Collections batch was generated and when you are attempting to commit the batch, a warning message will display and the batch will need to be regenerated.

- Once the batch is committed, the status of the tickets included in the batch will be updated to the Collections status specified on the Generate step. Each ticket will also be updated to include the Collections Alert specified on the PT Setup window (PT> Utilities> Setup> Collections Alert field).

PT> Excessive Tickets

Processing Excessive Tickets

Summary

The Excessive Tickets batch process is used to generate notices for individuals that have been cited for more than a specified number of parking violations. This process can also be used to update the status on the included parking tickets.

Step by Step

1 Open or create an Excessive Tickets batch.

- Select the Excessive Tickets palette in PT> Excessive Tickets. This will expand the Excessive Tickets palette and display the steps of the batch process.
- Modify an existing batch or create a new Excessive Tickets batch.
    - Select a batch number from the drop-down menu at the top of the Excessive Tickets palette to select an existing batch.
    - Select New from the batch number drop-down menu to create a new batch. This will open the **New Batch** window.

- If there are open batches in the Excessive Tickets process, you can create a new batch without affecting the open batches.
- Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are for reference only. The fiscal period of the transactions in the batch is determined by the Journal Entry Date entered during the Generate step.
- Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.
  - You can also manually create a new batch by entering a Batch Number and clicking the Save icon .

- Highlight the batch in the batch number drop-down menu on the Excessive Tickets palette and press DELETE to delete a batch. Any uncommitted transactions in the batch will be deleted.

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2 Generate the Excessive Tickets batch.

- Open the **Generate Excessive Tickets** window (PT> Excessive Tickets> Generate).
- Select each **Status** that you would like to include in the Excessive Tickets batch.
  - Click the Select All or Deselect All icon to select or deselect all of the displayed statuses. All statuses are selected by default.

    - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- Enter the **Tran Date** for the batch.
    - This is the date that will be associated with the Excessive Ticket Letters transactions that are created when the batch is committed. This is also the date that will populate the Excess Date field on the included citations.
- The **Minimum Vehicle Tickets** field is used to specify how many tickets will be deemed excessive for the current batch. Only those vehicles or people that meet or exceed this number of tickets will be included in the batch.
    - The system will include all unpaid tickets of the selected statuses when calculating the number of tickets. This includes tickets that have already been marked as excessive.
- The **New Ticket Status** field is used to specify the new status that each ticket included in the batch will be updated to when the batch is committed.
    - This field will automatically populate with the status specified on the PT Setup window (PT> Utilities> Setup> Excessive Ticket Status field).
- Check the **Resend notices if already marked excessive** toggle if you would like to resend excessive tickets letters for any included tickets that have already be marked as excessive.
- The **Ticket** section is used to manually add specific tickets to the batch.
    - Click the Create icon to add a ticket to the batch. This will launch the Parking Ticket Selection window.
    - Highlight the desired tickets and click the Confirm icon to add them to the batch.

        - Press SHIFT or CTRL while selecting tickets in order to add multiple tickets to the batch.
    - If individual tickets are added to the excessive tickets batch, all other filter details specified on the Generate window will be disregarded. Only the selected tickets will be processed.
    - Highlight a ticket and click the Delete icon to remove it from the excessive tickets batch.
- Click the Confirm icon to generate the excessive tickets batch.

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3 Edit the Excessive Tickets batch.

- Open the **Edit** window (PT> Excessive Tickets> Edit).
- The **Ticket** tab of the Edit window will display all the tickets included in the excessive tickets batch. Each included ticket can be reviewed and modified before proceeding. This is an optional step.
    - Highlight a ticket and click the Delete icon to remove the ticket from the excessive tickets batch.
- The **Errors** tab will display all of the tickets that met the filtering requirements of the Generate step but cannot be included in the excessive tickets batch.
    - The Warning Message column will display the reason that the ticket cannot be included in the batch. Tickets that meet one of the following criteria cannot be included in an excessive tickets batch:

    - Citation is in a pending Cash Receipts batch.
    - Citation is in another pending Excessive Tickets batch.
    - Citation was manually included in the Excessive Tickets batch but has no outstanding balances.
- Click the Save icon if any changes were made during the edit step.

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4 Print the Excessive Tickets Proof List.

- Open the **Proof List** window (PT> Excessive Tickets> Proof List).
- Select a **Report Type** from the drop-down menu.
    - The Summary report will display the Name, Vehicle Year, Make, Model, Tag Number, Tag Expiration Date, number of Tickets and Amount. A report total will also be provided.
    - The Detail report will display everything included in the Summary report as well as the Citation Number, Citation Date and Location.
- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.

- Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.
- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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5 Print the Excessive Tickets Letters.

- Open the **Letters** window (PT> Excessive Tickets> Letters).
- Select a **Form** from the drop-down menu. If a default form is specified on the PT Setup window (PT> Utilities> Setup> Excessive Tickets Form field), that form will automatically populate and this field will not be enabled.
  - The format and information included in the Excessive Tickets letters is determ-ined by which form is selected.
  - Forms are created and maintained on the Forms Maintenance window (PT> Maintenance> Form).
- The **Tran Date** field will populate with the transaction date specified in the Generate step.
- The **Compatibility** mode toggle is used to activate compatibility mode for legacy forms that don't use standard Springbrook forms functionality.

- Springbrook does not recommend using Compatibility mode as it will disable a number of useful form features.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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6 Commit the Excessive Tickets batch.

- Open the **Batch Commit** window (PT> Excessive Tickets> Commit).
- Click the OK button to commit the batch.
    - If a citation included in the excessive tickets batch has been added to a Cash Receipts batch between the time when the excessive tickets batch was gen-

erated and when you are attempting to commit the batch, a warning message will display and the batch will need to be regenerated.

- Once the batch is committed, the status of the tickets included in the batch will be updated to the status specified on the PT Setup window (PT> Utilities> Setup> Excessive Tickets Status field).

PT> Maintenance> Alert Code

Alert Code Maintenance

Summary

Alert codes can be set up to alert users when they select and edit a parking ticket from within the PT module or when the parking ticket is accessed via the Cash Receipts interface. The alert window will display the system that the parking ticket was accessed from, the alert code, the expiration date for the alert code, and any comments added to the alert code. When the user closes the alert window, the parking ticket that they selected will open.

The PT module can also be set up to automatically attach a collections alert code to parking ticket when that ticket is pulled into a collections batch. When the parking ticket is paid through Cash Receipts, the collections alert will automatically be removed from the ticket.The collections alert is specified on the PT Setup window (PT> Utilities> Setup> Collections Alert field).

The alert code details specified when the alert code is created are used only as a template. These details can be edited when the alert code is attached to a parking ticket. Because these details can be edited on each ticket, any changes made to an alert code on the Alert Code Maintenance window will not automatically update on the parking tickets that the edited alert code was previously attached to.

Step by Step

1 View the existing alert codes.

- Open the **Alert Code Maintenance** window (PT> Maintenance> Alert Code).
- The left section of the window will display all of the alert codes that have been created in the application. Select an alert code in the left section of the window and the information attached to that alert code will populate in the Maintenance section to the right.
- Highlight an alert code and press DELETE or click the Delete icon if you would like to delete an alert code.
  - You cannot delete an alert code that is attached to a parking ticket.
- Press INSERT or click the Create icon if you would like to create a new alert code. This will create a new line item in the left section of the window and the fields in the Maintenance section will be enabled to enter the alert code information.

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2 Create a new alert code.

- Enter a unique **Alert Code**. Once the new alert code is saved, this field cannot be edited.
  - The alert code can be up to 20 characters long.

- Enter a **Description** for the new alert code.
    - This field can be up to 60 characters long.
- Specify the alert code **Duration** in days.
    - The default start date for an alert code is the day it is attached to the parking ticket. The alert code expiration date is the start date plus the Duration. This value can be between 0 and 999.
- Enter a **Comment** on the alert code.
    - The Comment will display when the alert is activated. The field can be up to 1024 characters.
- Check the **Selection Alert** toggle to activate the alert message when the parking ticket is individually selected for batch process, such as PT Past Dues.
    - The selection alert will not activate if the account is included in a batch as a member of a group select during a batch generate step.
- Check the **Maintenance Alert** toggle to activate the alert message when the parking ticket is opened from any window where the ticket details can be maintained or edited.
- Check the **CR Receipt Alert** toggle to activate the alert message when the parking ticket is selected from the CR Cash Entry search window.
- Click the Save icon  to save the new alert code.

PT> Maintenance> Credit Type

Create Credit Types in PT

Summary

Credit types are used to apply a credit to a fee on an existing parking ticket without impacting the General Ledger. Credit types can be attached to parking tickets in the Parking Tickets Maintenance window (PT> Maintenance> Parking Tickets> History tab> Add a Credit icon). Follow this process to create a credit type.

Step by Step

1 Open the **Credit Type Maintenance** window.

- The **Credit Type Maintenance** window (PT> Maintenance> Credit Type) will display a list of all the credit types created in the application.
- Click the Delete icon to delete a credit type.
  - You cannot delete credit types that have been attached to parking tickets.
- Click on the Create icon to add a new credit type.

2 Create a new credit type.

- Enter a unique **Credit Type** code. This code can be up to 8 alphanumeric characters.
    - This field will not be enabled and available for editing after the credit type has been saved.
- Enter a description in the **Description** field. The Description can be up to 60 alphanumeric characters.
- Check the **Disabled** toggle to disable the credit type.
    - Disabled credit type will not populate the selection window when a user attempts to attach a credit type to a parking ticket. This allows you to disable a credit type that should no longer be used without being forced to delete the credit type.
- Click on the Save icon or press ENTER to save the credit type.

PT> Maintenance> Fees

Create a Fee in PT

Summary

The Fee Maintenance window is used to create and maintain fee codes. These fee codes are then attached to parking tickets in order to levy parking fines. Follow this process to create a parking ticket fee.

Step by Step

1 View the existing PT fees.

- The **Fee Selection** window (PT> Maintenance> Fees) displays all of the fees created in the PT Module.
- Highlight a fee and click the Delete icon  or press DELETE to delete the selected fee.
    - Fees that are attached to parking tickets or other fees as penalty fees cannot be deleted.

- Highlight a fee and click the Modify icon to edit the selected fee.
- Click the Create icon to open the **Fee Maintenance** window.

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2 Create a new fee.

- Enter a unique **Fee Code** for the new fee.
  - This field can accommodate up to 8 alphanumeric characters. Once the fee has been saved, this field cannot be edited.
- Enter an optional **Description** for the fee.
  - This field can accommodate up to 60 alphanumeric characters and will be displayed on the parking ticket when the citation is issued.
- Select the **Fee Type** from the drop-down menu.
  - Select Standard if you would like to create a standard flat rate fee that will be levied when a parking ticket is issued. This will enable the Fixed Amount field below.
  - Select Penalty if you would like to create a fee that can be used to penalize individuals that have failed to pay parking tickets by the specified due date. This will enable the Rates section below.
- Enter an amount in the **Fixed Amount** field if you are creating a standard fee. This fee code will be used for a transaction that is usually the same dollar amount.
  - This field is only enabled when creating a Standard fee.

- Enter a **Payment Priority** or click the field label to choose one from a list. This is a required field.
    - Payment priority codes determine the order in which fees are paid. Payment priorities are created and maintained on the Payment Priority Maintenance window (PT> Maintenance> Payment Priority).
- Attach a **Revenue Account** and **Cash Account** to the fee. These accounts must be designated in order to create the fee.
- If you would like to attach a **Penalty Fee** to the new fee, enter one in the Penalty Fee field or click the field label to choose one from a list. Penalty fees are generally attached to PT fees to assess penalties on delinquent parking tickets.
    - If the Fee Selection window does not display a penalty fee, you will need to create one before it can be attached to another fee. This field will only be enabled when creating a standard fee.
- The **Disabled** toggle is used to retire a fee from use without deleting it.
    - If this toggle is checked, the fee will not be available when issuing a parking ticket. This toggle is unchecked by default.

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3 Add rates to a penalty fee.

- The **Rates** section of the Fee Maintenance window is used when creating a penalty fee. This section will not be enabled when creating a standard fee.
- Click the Create icon  to create a new rate line item.
- Enter the range values in the **Greater Than** and **Through** fields.

    - These values will designate the lower and upper limits of each penalty fee tier.
    - For example, a three-tier late fee might include ranges of 0 - 15 days, 15 - 30 days and 30 - 45 days. In this case, you would need to create a new rate line item for each of these ranges. The high limit a lower tier should match the low limit of the next tier.
- Check the **Or Over** toggle if you want the range to apply to unit values that are greater than the upper range entered in the Through field.
- Enter a **Rate** for the fee.
    - The percentage in the Rate field will be multiplied by the past due amount.
- Click the Save icon  when complete.

PT> Maintenance> Forms

Forms Maintenance

Summary

Forms refer to Microsoft Word documents that, through the use of merge fields, allow users to pull data from the application and customize how that data is displayed on the forms. Forms will be saved in the Springbrook folder on your server at the path specified when the application was installed (SS> Utilities> System Setup> System tab> Archive Directory field).

The forms will be saved as .sbw files in this folder and should not be edited to avoid corruption. Forms can be attached to various application elements through the module process and maintenance palettes.

Follow this process to create forms to attach to Parking Tickets processes. The forms set up in the PT module will not be accessible in other modules that use forms.

Step by Step

1 View the existing Forms.

- Open the Word Merge Form Selection window (PT> Maintenance> Forms).
- The Word Merge Form Selection window will display all of the forms created in the application. Use the search criteria fields to filter the displayed forms.
- Highlight a form and click the Preview icon to view the selected form. This will open the MS Word document in a new window.
- Highlight a form and click the Copy icon to copy the selected form. This will create a copy of the original form.
- Highlight a form and click the Delete icon or press DELETE to delete the selected form.
- Highlight a form and click the Modify icon or press ENTER to open and edit an existing form.
- Click the Create icon or press INSERT to create a new form. This will open the Word Merge Form Maintenance window.

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2 Create a new Form.

- Enter a unique **Form Name** for the form. The field can be up to 32 characters long. Once the form has been saved, you will not be able to edit this field.
- Enter an optional form **Description**.
- The **System** field will default to PT and cannot be edited.

- Select the **Process** that the new form will be used in.
    - This form will only be available in the process selected in this drop-down menu.
- After you have entered the form details, click the Create icon to create the form. This will open a new Word document.
    - Once the Word document is open, use the insert merge fields command in Word to specify the data fields you want displayed on the form. For instance, the merge field Citation_Number is the citation number recorded on the parking ticket. By inserting this merge field into the Word document, and then attaching the form to a PT process, the form will display the data found in the citation number field of the parking ticket included in the process.
    - NOTE: When creating a form that includes fee data, you must use the Fee_SectionStart and Fee_SectionEnd merge fields before and after the other fee merge fields will display.
    - Images, charts, tables, etc. can also be inserted into the Word document.
- Once you are finished creating/modifying your form, be sure to save the form both on the Word document (File> Save) and using the Save icon on the Form Maintenance window.
- The new form will now be available when creating form letters in the specified PT process.

PT> Maintenance> Location

Create a Location in PT

Summary

Location codes are used to organize parking tickets by the physical locations where they are issued.

If you would like to locate all of the parking tickets attached to a location, use the Parking Tickets Report filtered by that location (PT> Reports> Parking Tickets).

Step by Step

1 View the locations set up in the PT module.

- Open the **Locations Maintenance** window (PT> Maintenance> Locations).
- The Locations Maintenance window will display all of the locations that have been set up in the module.
- Highlight a location in the left section of the window and the fields in the Maintenance section will populate with the information attached to the selected record.

- Click the Delete icon or press DELETE to delete the selected location.
    - You will not be able to delete a location that is attached to a parking ticket. Locations are attached to parking tickets on the Parking Ticket Maintenance window (PT> Maintenance> Parking Tickets> General tab> Location field).
- Click the Create icon or press INSERT to create a new location. This will create a new line item in the left section of the window.

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2 Create a new location.

- Enter a unique **Location** code. This code can be up to 8 alphanumeric characters.
    - This field will not be enabled and available for editing after the location has been saved.
- Enter a description in the **Description** field. The Description can be up to 60 alphanumeric characters.
- Check the **Disabled** toggle to disable the location.
    - Disabled locations will not populate the selection window when a user attempts to attach a location to a parking ticket.
- Click on the Save icon or press ENTER to save the location.

PT> Maintenance> Officer

Create an Officer in PT

Summary

Officers can be attached to parking tickets in order to track which individual issued each parking ticket. The Officer Maintenance window is used to record the officer details.

Step by Step

1 View the Officers set up in the application.

- The **Officer Selection** window (PT> Maintenance> Officer) will display all of the officers that have been set up in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon to filter the officers that will display in the window.
- Highlight an officer and click the Delete icon to delete the selected officer.
    - An officer that is associated with an existing parking ticket cannot be deleted.
- Highlight an officer and click the Modify icon to open an existing officer.

- Click the Create icon to create a new officer. This will open the **Officer Maintenance** window.

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2 Create a new officer.

- The **Officer Maintenance** window is used to record the officer details.
- The **Officer Number** field will automatically populate with the next available officer number. This field cannot be manually edited.
- Only the **Last Name**, **First Name** and **Badge Number** fields are required. Enter this information, as well as any other desired details, and click the Save icon to save the new officer.

PT> Maintenance> Parking Tickets

Create a Parking Ticket

Summary

The parking ticket is the central entity in the Parking Ticket module. Follow this process to create a parking ticket.

Step by Step

1 View the existing Parking Tickets.

- Open the **Parking Ticket Selection** window (PT> Maintenance> Parking Tickets).
- The Parking Ticket Selection window displays all the parking tickets previously created in the application.
- Highlight a parking ticket and press DELETE or click the Delete icon to delete a ticket.
  - A parking ticket that has been associated a transaction cannot be deleted.
- Highlight a parking ticket and press ENTER or click the Modify icon to edit the selected parking ticket.

- Press INSERT or click the Create icon to create a new parking ticket. This will open the **Parking Tickets Maintenance** window.

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2 Create a new Parking Ticket.

- The **General** tab is used to record the general parking ticket information.
- Enter a unique **Citation Number** for the parking ticket.
  - This is the number that will be used to track the parking ticket details. Many cities use the numbers printed on the citations notepads used by parking enforcement officers. This is a required field.
- Enter a ticket **Status** or click the field label to select one from a list.
  - The status field is a user-defined field that allows you to categorize your parking tickets in order to identify their standing. This is a required field.
  - The Past Dues, Collections, and Excessive Tickets process can all change parking tickets to unique statuses.
  - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
  - The **Status Description** field will automatically populate with the description specified on the status selected above.
- Enter the **Citation Date** and **Citation Time** that the parking ticket was created.
- Enter the **Location** where the citation was issued or click the field label to select one from a list.

    - Locations are created and maintained on the Location Maintenance window (PT> Maintenance> Location).
- Enter the **Court Date** and **Court Time** when the recipient can contest the parking ticket.
- The **Comments** field is used to add any desired comments to the parking ticket. This field can accommodate up to 512 alphanumeric characters.
- The **Excessive Date** field and **Excessive tickets** toggle will automatically update if the ticket is included in an Excessive Tickets batch (PT> Excessive Tickets).
- Enter the **Vehicle Number** that is being cited or click the field label to select a vehicle from a list. This is a required field.
    - The vehicle code contains all of the vehicle details that will populate the fields below. If the vehicle number does not already exist, you can click the field label to open the Vehicle Selection window and then click the Create icon  to add the vehicle to the database.
    - Vehicles are created and maintained on the Vehicle Maintenance window (PT> Maintenance> Vehicle).
- Enter the **Officer Number** for the officer that issued the citation or click the field label to select an officer from a list.
    - The Officer Name and Officer Badge fields will populate with the details attached to the selected officer number.
    - Officers are created and maintained on the Officer Maintenance window (PT> Maintenance> Officer).
- The **Status Change History** field will display a line item for each time the parking ticket status changes.

- The **Include Payments** drop-down menu is used to specify if the financial details displayed below include all payments or only committed payments.
- The **Total Fees**, **Total Paid** and **Balance** fields will display the current financial details associated with the ticket.
- The **Fees** field is used to attach fees to the parking ticket. required.
  - Only standard fees can be added or removed from here. Penalty fees are added to the parking ticket during the Past Dues and Collections batch processes.
  - PT fees are created and maintained on the Fee Maintenance window (PT> Maintenance> Fee).

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3 Complete the Person tab.

- The **Person** tab is used to attach a person and/or an existing Springbrook customer to the parking ticket.
- Enter a **Person Number** or click the field label to select one from a list.
  - The details attached to the selected person will populate the fields below.
  - People are created and maintained on the Person Maintenance window (PT> Maintenance> Person).
- Enter a **Customer Number** or click the field label to select one from a list.
  - The details attached to the selected customer will populate the fields below.
  - Customers are created and maintained on the Customer Maintenance window (SS> Maintenance> Customer).

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4 Complete the History tab.

- The **History** tab is used to track the transaction history and attach credit types to the parking ticket. This window will display every transaction recorded against the parking ticket. These transactions include credit types, which are attached to parking tickets in order to affect the ticket balance without impacting the General Ledger.
  - Credit types are created and maintained on the Credit Type Maintenance window (PT> Maintenance> Credit Type).
- Click the Create icon to attach a credit type to the parking ticket. This will open the Credit Type Selection window.
  - Select a credit type and click the Confirm icon to add that selected credit type to the parking ticket. This will enable a new line item in the Credit Details section at the bottom of the History tab.
  - Specify an **Amount** for the new credit type line item. The amount specified cannot exceed the remaining balance on the parking ticket.
- Once the parking ticket is saved, the credit type amount will appear as a payment in the Fees field of the General tab and the ticket balance will reflect this payment.
- You can also remove a credit type from a parking ticket by highlighting the credit type and click the Delete icon .

5 Complete the Alert tab.

- The **Alert** tab will display all of the existing alerts attached to the parking ticket.
- Highlight an alert code and click the Delete icon or press DELETE to remove the selected alert code from the ticket.
- Highlight an alert code and click the Modify icon or press ENTER to edit the selected alert code.
- Click the Create icon or press INSERT to attach a new alert code to the parking ticket. This will open the Alert Code Selection window.
  - Select an alert code and click the Confirm icon to add the selected alert code to the ticket.
  - Alert codes are created and maintained on the Alert Code Maintenance window (PT> Maintenance> Alert Code).
- The **Description** field will automatically populate with the description attached to the selected alert code.
- Enter an **Alert Date** for the new alert code. This represents the date that the alert code becomes active.
  - This field will automatically populate with today's date.
- The **Expiration Date** is calculated by adding the alert duration specified on the selected alert code to the date specified in the Alert Date field. If the Alert Date is updated, the Expiration Date will automatically update according to this calculation.
  - The Expiration Date cannot be prior to the Alert Date.
- The **Comment** field will populate with the comment attached to the selected alert code but can be edited.

- Check the **Selection Alert** toggle to activate the alert message when the ticket is individually selected for a batch processes such as PT Collections.
  - The selection alert will not activate if the ticket is included in a batch as a member of a group select during a batch generate step.
- Check the **Maintenance Alert** toggle to activate the alert message when the ticket is opened from any window where the ticket details can be maintained or edited.
- Check the **CR Receipt Alert** toggle to activate the alert message when the ticket is selected from the CR Cash Entry search window.

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6 Complete the Miscellaneous tab.

- The **Miscellaneous** tab allows you to build your own tables of data if there is information you want to track. This information is optional and user-defined.
- Miscellaneous field labels are maintained on the Miscellaneous Field Label Maintenance window (SS> Utilities> Miscellaneous Field Labels).
- Click the Save icon when the parking ticket is complete.

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7 Track any changes made to the parking ticket record.

- Click the Audit Trail icon to open the Audit Trail window.
- Use the Search Criteria section to sort the displayed audit history.

- The Audit Trail section will provide details about any changes made to the parking ticket record including the date of the change, type of change made, user that made the change, and data table that was edited.

PT> Maintenance> Payment Priority

Payment Priorities Maintenance

Summary

Payment priority codes determine the order in which fees are paid. Fees attached to higher priority levels will be paid in full before fees attached to lower priority levels. If there is not enough money to pay a certain level of priority, the system will allocate the payment across all the fees with the same priority level.

Step by Step

1 Open the **Payment Priority Maintenance** window.

- The **Payment Priority Maintenance** (PT> Maintenance> Payment Priorities) window will display a list of all the payment priority codes created in the application.
- Click the Delete icon to delete a payment priority code. You cannot delete payment priority codes that are attached to existing fees.
- Click on the Create icon to add a new payment priority code.

2 Create a Payment Priority Code.

- Enter a payment priority code in the **Code** field. This Code can be up to 10 alpha-numeric characters. This field will not be enabled and available for editing after the payment priority code has been saved.
- Enter a description in the **Description** field. The Description can be up to 60 alpha-numeric characters.
- Enter a **Priority** for the code. The priority can range from 00, the highest priority, to 99, the lowest priority.
- Click on the Save icon or press ENTER to save the payment priority code.

PT> Maintenance> Person

Create a Person in PT

Summary

A person can be attached to the Person tab of the Parking Tickets Maintenance window (PT> Maintenance> Parking Tickets> Person tab> Person Number field). You can create people as the citation is created, or you can create them using the Person Maintenance window.

Step by Step

1 View the People set up in the application.

- The **Person Selection** window (PT> Maintenance> Person) will display all of the people that have been set up in the application.
- Enter information in the fields in the Search Criteria section of the window and click the Refresh icon to filter the people that will display in the window.
- Highlight a person and click the Delete icon to delete the selected person.
  - A person that is associated with an existing parking ticket cannot be deleted.

- Highlight a person and click the Modify icon to open an existing person.
- Click the Create icon to create a new person. This will open the **Person Maintenance** window.

---

2 Create a new Person.

- The Person Maintenance window is used to record the person details.
- The **Person Number** field will automatically populate with the next available person number. This field cannot be manually edited.
- Only the **Last Name** and **First Name** fields are required. Enter this information, as well as any other desired details, and click the Save icon to save the new person.

PT> Maintenance> Status

Create a Status in PT

Summary

The Status Maintenance window is used to create and maintain statuses. A status is a user-defined code used to describe the current state of a parking ticket.

Statuses are attached to parking tickets on the Parking Ticket Maintenance window (PT> Maintenance> Parking Ticket> General tab> Status field). Statuses can also be set up to automatically update after a parking ticket is processed through a PT batch. Those default statuses are specified on the PT Setup window (PT> Utilities> Setup).

Follow this process to create a new PT status.

Step by Step

1 View the statuses set up in the PT module.

- Open the **Ticket Status Maintenance** window (PT> Maintenance> Status).
- The Ticket Status Maintenance window will display all of the statuses that have been set up in the module.
- Highlight a status in the left section of the window and the fields in the Maintenance section will populate with the information attached to the selected record.
- Click the Delete icon or press DELETE to delete the selected status.
  - You will not be able to delete a status that is attached to a parking ticket. Statuses are attached to parking tickets on the Parking Ticket Maintenance window (PT> Maintenance> Parking Tickets> General tab> Status field).
- Click the Create icon or press INSERT to create a new status. This will create a new line item in the left section of the window.

---

2 Create a new status.

- Enter a unique **Status** code. This code can be up to 8 alphanumeric characters.
  - This field will not be enabled and available for editing after the status has been saved.
- Enter a description in the **Description** field. The Description can be up to 60 alphanumeric characters.
- Check the **Disabled** toggle to disable the status.
  - Disabled statuses will not populate the selection window when a user attempts to attach a status to a parking ticket.

- Click on the Save icon or press ENTER to save the status.

PT> Maintenance> Vehicles

Vehicle Maintenance

Summary

The Vehicle Maintenance window is used to record the registration and description details associated with a vehicle being cited.

Step by Step

1 Open the Vehicle Selection window (PT> Maintenance> Vehicle).

- The **Vehicle Selection** window will display all of the vehicles that have been created in the system.
- Enter any desired vehicle details in the Search Criteria section and click the Refresh icon to filter the displayed vehicles.
- Highlight a vehicle and click the Delete icon or press DELETE to delete the selected vehicle.
  - You will not be able to delete a vehicle that is attached to a parking ticket. Vehicles are attached to parking tickets on the Parking Ticket Maintenance

window (PT> Maintenance> Parking Tickets> General tab> Vehicle Number field).

- Click the Create icon or press INSERT to create a new vehicle. This will launch the Vehicle Maintenance window.

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2 Create a new vehicle record.

- The **Vehicle Number** field will automatically populate with the next available vehicle number when the new vehicle is saved. The field cannot be edited.
- Enter the **Tag Number** and select the **Tag State** for the vehicle.
  - These are the only two required fields on the Vehicle Maintenance window.
- Enter the **Tag Expiration** date
- Enter the **VIN** (vehicle identification number) for the vehicle.
- Enter any additional vehicle details in the **Year**, **Make**, **Model**, **Type** and **Color** fields.
- Click the Save icon when all the desired vehicle details are entered.

PT> Past Dues

Process Past Dues

Summary

The Past Dues batch process will charge late fees on the violations attached to a parking ticket, automatically update the status of selected parking tickets, and generate past due form letters.

Step by Step

1 Open a Past Dues batch or create a new one.

- Select the Past Dues palette in PT> Past Dues. This will expand the Past Dues palette and display the steps of the batch process.
- Modify an existing batch or create a new Past Dues batch.
    - Select a batch number from the drop-down menu at the top of the Past Dues palette to select an existing batch.
    - Select New from the Past Dues batch number drop-down menu to create a new batch. This will open the **New Batch** window.

    - If there are open batches in the Past Dues process, you can create a new batch without affecting the open batches.
    - Enter a **Batch Month** and **Batch Year**. These fields default to the current calendar period and are for reference only. The fiscal period of the transactions in the batch is determined by the transaction date entered during the Generate step.
    - Click the Generate icon to populate the **Batch Number** field with the next available batch number. Batch numbers are limited to five digits and must be unique within the batch month of the batch year.
        - You can also manually create a new batch by entering a Batch Number and clicking the Save icon .
- Highlight the batch in the batch number drop-down menu on the Past Dues palette and press DELETE to delete a batch. Any uncommitted transactions in the batch will be deleted.

---

2 Generate the Past Dues batch.

- Open the **Generate Past Dues** window (PT> Past Dues> Generate).
- Check the **Fee** toggle for each fee you would like to send to Past Dues.
    - Click the Select All or Deselect All icon drop-down menus to select or deselect all of the displayed Fees. All Fees are selected by default.
        - These icons can be used to select or deselect the Statuses as well.

    - Fees are created and maintained on the Fee Maintenance window (PT> Maintenance> Fees).
- Check the **Status** toggle for each status you would like to send to Past Dues.
    - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- Specify a **Tran Date** for the Past Dues batch. This date will be used by the Letter and Penalty transactions created when the batch is committed.
- Specify an **Aging Date** for the batch.
    - The Aging Date is the date the system will use in conjunction with the Minimum Age and Maximum Age fields to determine which tickets are to be put into Past Dues status.
        - For example, if 10/15/15 was entered as the Aging Date, and 30 and 999 are entered in the Minimum/Maximum fields, all citations with a date older than September 15th (30 days old) would be selected to for the Past Dues batch.
- Enter a **New Ticket Status** or click the field label to select a status from a list.
    - This is the status that will be automatically assigned to any citations included in the Past Dues batch. This will default to the Past Dues status specified on the PT Setup window (PT> Utilities> Setup> Past Dues Status field).
- The **Filter** tab is used to filter the citations that will be included in the Past Dues batch.
    - The **Minimum Age** and **Maximum Age** fields are used to filter the included citations by their age in relation to the Aging Date specified above.

- The **Minimum Status Age** field is used only by the Collections process and is disabled here.

- The **Ticket** tab is used to add specific parking tickets to the Past Dues batch.
  - Click the Create icon to select specific parking tickets to include in the batch. This will launch the Parking Ticket Selection window.
  - Filter the displayed tickets and click the Confirm icon when you have made your selection. You can use the CTRL or SHIFT keys to select multiple tickets.
  - Manually selecting parking tickets to include in the batch will override any filtering details specified on the Filter tab.
- Click the Save icon when compete.

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3 Edit the Past Dues.

- Open the **Edit Past Dues** window (PT> Past Dues> Edit).
- The Ticket tab of the Edit Past Dues window displays all of the tickets that will be included in the Past Dues batch.
  - Click a citation number to open and edit the included ticket.
  - Highlight a ticket and click the Delete icon to remove the ticket from the batch.

- The Errors tab will display any tickets that meet the filter requirements specified in the Generate step but cannot be included in the Past Dues batch. The Warning Message column will display the reason that the ticket cannot be included in the batch. Tickets that meet one of the following criteria cannot be included in a Past Dues batch:
    - Citation is in a pending Cash Receipts batch.
    - Citation is in a pending Collections batch.
    - Citation is in another pending Past Dues batch.
    - Citation has outstanding fees but no associated penalties or penalties that do not have billable rate tiers for the current number of days past due.
    - Citation was manually included in the Past Dues batch but has no outstanding balances that qualify for past dues penalties.
- Click the Save icon when compete.

---

4 Print the Proof List.

- Open the **Past Dues Proof List** window (PT> Past Dues> Proof List).
- Select a **Report Type** from the drop-down menu.
    - The Summary report displays the Citation Number, Citation Date, Location, Name, Vehicle Year, Make, Model, Tag Number, Tag Expiration Date and Amount for each ticket. The report will also include a report total and the number of printable notices generated by the batch.

    - The Detail report displays everything included in the Summary report as well as the specific late fee codes that will be charged when the Past Due batch is processed.
        - The detail report will display a new violation line item for every late fee that will be applied to the violation.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Spring-brook formatting found on the printed version of the report.
    - Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

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5 Print the Past Dues Letters.

- Open the **Letters** window (PT> Past Dues> Letters).
- Select a **Form** from the drop-down menu. If a default form is specified on the PT Setup window (PT> Utilities> Setup> Past Dues Form field), that form will automatically populate and this field will not be enabled.
    - The format and information included in the Past Dues letters is determined by which form is selected.
    - Forms are created and maintained on the Forms Maintenance window (PT> Maintenance> Form).
- The **Tran Date** field will populate with the transaction date specified in the Generate step.
- The **Compatibility** mode toggle is used to activate compatibility mode for legacy forms that don't use standard Springbrook forms functionality.
    - Springbrook does not recommend using Compatibility mode as it will disable a number of useful form features.
- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.
    - Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.

- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

6 Commit the Past Dues batch.

- Open the **Commit** window (PT> Past Dues> Commit).
- Click OK to commit the batch.
  - If a citation included in the Past Dues batch has been added to a Cash Receipts batch between the time when the Past Dues batch was generated and when you are attempting to commit the batch, a warning message will display and the batch will need to be regenerated.
- Once the batch is committed, the status of the tickets included in the batch will be updated to the Past Dues status specified on the Generate step.

PT> Reports> Parking Tickets

Parking Tickets Report

Summary

The Parking Tickets report provides a filtered list of parking tickets.

Step by Step

1 Open the Parking Tickets report (PT> Reports> Parking Tickets).

2 Configure the report.

- Check the toggle next to each **Location** you would like to include in the report.
    - By default, all locations will be selected. You can use the Select All or Deselect All icons to select or deselect all the displayed locations.
    - Locations are created and maintained on the Location Maintenance window (PT> Maintenance> Location).

- Check the toggle next to each **Status** you would like to include in the report.
    - By default, all statuses will be selected.
    - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- The **Layout** tab is used to specify how the report will be displayed.
    - Check the **Include citations**, **Include fees**, **Include person** and **Include vehicle** toggles to include that information in the report.
- The **General**, **Excessive Tickets** and **Past Due** tabs are used to filter the included parking tickets by the fields displayed on those tabs.
- Depending on how the Layout tab is configured, the report will display the Citation Number, Date, Status, Location, Vehicle, number of Tickets, Amount, Payments, and Balance. A report total will also be provided.

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3 Print the report.

- Click the Print icon to process the report immediately or enter a date and time in the field next to the Print icon to schedule the report to generate at a later time. You can view the progress of the report on the Job Viewer window (SS> Utilities> Show Scheduled Jobs).
    - Click the Print icon drop-down menu and select Print Preview to preview the report before printing.
    - Click the Print icon drop-down menu and select Excel to export the report data to an Excel spreadsheet as unformatted data.

- Click the Print icon drop-down menu and select Excel (Formatted) to export the report data to an Excel spreadsheet that includes much of the Springbrook formatting found on the printed version of the report.
- Once the report is generated, you can also display the report using the View Reports window (SS> Utilities> View Report).

PT> Utilities> Setup

Set up the Parking Tickets Module

Summary

Follow this process to set up the Parking Tickets module.

Step by Step

1 Open the Parking Ticket Setup window (PT> Utilities> Setup).

2 Setup the Parking Tickets module.

- The **Max Letters Per Recipient** field is used to specify the maximum number of letters that can be sent to a single recipient included in a PT batch process.
- Specify which **Form** will be the default letter generated during the Letters step of the Past Due, Collections and Excessive Tickets processes.
    - The forms specified in these fields are Microsoft Word documents that, through the use of merge fields, allow users to pull data from the application and customize how that data is displayed on the forms.

        - Forms are created and maintained on the Forms Maintenance window (PT> Maintenance> Forms).
    - The form letters specified here are only default letters. Different letters can be specified every time you run a PT batch process letter step.
- The Excessive Ticket Tow Days and Tow Ticket Count fields are only used by organizations that have purchased Springbrook's optional Mobile Parking Violation Interface. Springbrook partners, such as Quatred, have developed hand-held parking ticket software that communicates with Springbrook's Parking Tickets module through this interface, allowing parking officers to enter and print tickets remotely. If your organization does not use the Mobile Parking Violation Interface, these fields will not affect the application.
    - The **Excessive Ticket Tow Days** field is used to specify the number of days that an outstanding ticket must be marked as excessive before it is included on the Tow List.
    - The **Tow Ticket Count** field is used to specify the number of tickets that must be issued to a vehicle for that vehicle to be included on the Tow List.
        - To learn more about the Mobile Parking Violation Interface, please contact Springbrook at 866-256-7661 or sales@sprbrk.com.
- The **Collections Alert** field is used to specify the alert that will be added to any citation that is processed through a collections batch.
    - Alert codes are created and maintained on the Alert Code Maintenance window (PT> Maintenance> Alert).
- The **Status** fields are used to specify the default statuses associated with citations at various stages of the citation life cycle. Citations can be set up to automatically update to a specified status when they are successfully processed through a PT

batch process.

- The New Ticket Status field is used to specify the default status for all newly created tickets.
- The Past Due, Collections and Excessive Tickets Status fields are used to specify the status of any citation processed through one of these batch processes. Once processed, the status associated with any citation included in the batch will update to the status specified here.
- The Pay Off Status field is used to specify the status that will be associated with citations after they have been paid off.
- The Pay Collections Status field is used to specify the status that will be associated with citations that have been processed through a collections batch and then paid in full in Cash Receipts.

- Click the Save icon when the setup is complete.

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3 Track any changes made to the PT Setup window.

- Click the Audit Trail icon to open the Audit Trail window.
- Use the **Search Criteria** section to sort the displayed audit trail.
- The **Audit Trail History** section will provide details about any changes made to the setup window including the date of the change, type of change made, user that made the change, and data table that was edited.

PT> Utilities> Import/Export Parking Tickets

Import and Export Parking Tickets

Summary

The PT Import and Export Parking Ticket windows allow you to import citations from a PDA or export citations to create a tow list. Follow this process to import parking tickets or create the export files.

Step by Step

1 Import parking tickets.

- Open the **Import Parking Tickets** window (PT> Utilities> Import Parking Tickets).
- Enter a **File Name** path or click the field label to browse to the import file.
    - The import file must be in comma-separated value (.csv) format.
    - Click the Display icon  to display the expected .csv file layout.
        - The expected import will include the Record Type, Citation Number, Citation Date/Time, Vehicle Tag Number, Tag State, Tag Expiration Date,

Vehicle Make, Model and Color, Citation Location, and Officer Badge Number as separate columns on the .csv spreadsheet.

- Enter the **Status** that the imported parking tickets will be assigned.
  - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- Click the Confirm icon to import the parking tickets.

---

2 Export parking tickets files.

- Open the **Export Parking Tickets** window (PT> Utilities> Export Parking Tickets).
- Select each **Status** that you would like to include in the export file.
  - Click the Select All or Deselect All icon to select or deselect all of the displayed statuses. All statuses are selected by default.
  - Statuses are created and maintained on the Status Maintenance window (PT> Maintenance> Status).
- The **Waiting Period** field is used to specify a waiting period for any excessive tickets you would like to include in the export.
  - For example, enter 30 if you would like the tow list to include any vehicles that have been in excessive ticket status for over 30 days. Any vehicles in excessive ticket status for less than 30 days would not be included in the export file.
- Check the **Include all excessive tickets** toggle to include all the excessive tickets in the system in the export files.

  - Checking this toggle will override the Waiting Period specified above.

- Click the Confirm icon to generate the .dat export files.
- Once the export has finished processing, the **Export Settings** window will open. This window is used to specify the export path for the violations, locations and tow list for the exported tickets.
  - The Violations .dat export file includes the fee details associated with the included citations. These details include the fee identification number, the fee code, the fixed amount of the fee, and the late fees associated with the fee.
  - The Locations .dat export file includes the location details associated with the included citations. These details include the location identification number, the location code, and the location description.
  - The Tow List .dat export file includes the vehicle tag details associated with the included citations. These details include the vehicle tag number and tag state.
- Check the **Open** toggles if you would like to open the exported files after they are saved locally.
- Enter the export path locations and click the Save icon to export the files to the local paths.