# Patron Exceeds Fine Threshold: An End-User Look at Patron Billing

Presented by

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and

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## Billing in Evergreen

- Unlike other ILSs, bills are attached to patrons in Evergreen, not items
- Making a user Collections Exempt is a manual operation, so is Barring

Disclaimer: Most of the screen images were made on a training staff client with fictional characters. For the case study, patron info is obscured.

#### Quick Visual Clues about the Status of a Patron's Account

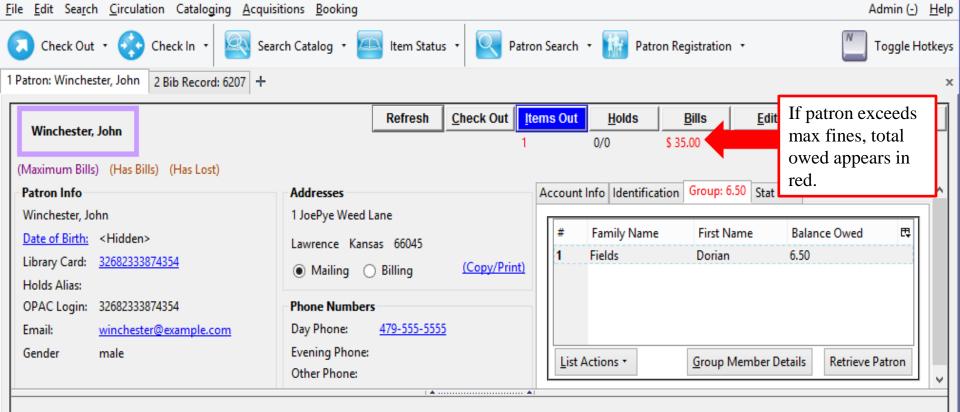
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STOP

#### Alert

CONS : Patron exceeds fine threshold

Press a navigation button above (for example, Check Out) to clear this alert.

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1 Patron: Winchester, John 2 Bib Record: 6207 +			2
Winchester, John	Refresh <u>Check Out</u>	Items Out         Holds         Bills         Ed           1         0/0         \$ 35.00         \$ 35.00	lit <u>M</u> essages <u>O</u> ther •
(Maximum Bills) (Has Bills) (Has Lost)			
Patron Info	Addresses	Account Info Identification Group: 6.50 Sta	at Cats
Winchester, John <u>Date of Birth:</u> <hidden> Library Card: <u>32682333874354</u> Holds Alias:</hidden>	1 JoePye Weed Lane Lawrence Kansas 66045 Mailing O Billing <u>(Copy/Print</u>	# Family Name First Name 1 Fields Dorian	Balance Owed 🛱 6.50
OPAC Login: 32682333874354	Phone Numbers		
Email: <u>winchester@example.com</u>	Day Phone: <u>479-555-5555</u>		
Gender male	Evening Phone: Other Phone:	List Actions • Group Member	r Details Retrieve Patron
STOP			
Alert CONS : Patron exceeds fine thresh Press a navigation button ab	penalty's "staff	ember page patron's ling	

#### Group Penalty Threshold

- Admin  $\rightarrow$  Local Administration  $\rightarrow$  Group Penalty Threshold
- Administrators set the threshold amount in which a penalty should occur
- Example: Penalty: PATRON\_EXCEEDS\_FINES

<u>File E</u> dit Sea <u>r</u> ch <u>C</u> irculation Cataloging	<u>A</u> cquisitions <u>B</u> ooking				Admin ( <u>-</u> ) <u>H</u> elp
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1 Server Settings +					×
Go Back Reload Go Forward	1				Debug <u>P</u> rint Page
Penalty Threshold				New Penalty Threshold	Delete Selected
Context Org Unit APEX	-				
Back Next Filter					
√ # Group	Org Unit	Penalty		shold	
1 Users	CONS	PATRON_EXCEEDS_O			
2 Users	CONS	DATDON EVOEEDO OL	UT 15.0	0	
3 Users	CONS		10.0	0	
4 Patron	APEX Group	Users	- 100	.00	
5 Resident	APEX Org Unit	APEX	▼ 10.0	0	
	Penalty	PATRON_EXCEEDS_FINE	<b>▼</b>		
	Threshold	15			
	Cancel	Save			

#### **Standing Penalties**

- Admin  $\rightarrow$  Local Administration  $\rightarrow$  Standing Penalties
- Once the user reaches the penalty threshold, the standing penalties apply
- Example: PATRON\_EXCEEDS\_FINES

Standing Penalty Types					
Standing Penalty Types					New Penalty Type Delete Selected
Back Next Filter					
√ # id	name	label	block_list	org_depth	staff_alert
□ 1 20	ALERT_NOTE	Alerting Note, no blocks			True
□ 2 29	INVALID_PATRON_ADDRESS	Patron has an invalid address			False
□ <b>3</b> 32	INVALID_PATRON_DAY_PHONE	Patron had an invalid daytime phone number		0	True
☐ 4 31	INVALID_PATRON_EMAIL_ADDRESS	Patron had an invalid email address		0	True
□ <b>5</b> 33	INVALID_PATRON_EVENING_PHONE	Patron had an invalid evening phone number		0	True
□ 6 34	INVALID_PATRON_OTHER_PHONE	Patron had an invalid other phone number		0	True
□ <b>7</b> 3	PATRON_EXCEEDS_CHECKOUT_COUNT	Patron exceeds max checked out item threshold	CIRC FULFILL		False
8 4	PATRON_EXCEEDS_COLLECTIONS_WAR	Patron exceeds pre-collections warning fine threshold	CIRC FULFILL HOLD CAPTURE RENEW		False
9 1	PATRON_EXCEEDS_FINES	Patron exceeds fine threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
□ <b>10</b> 35	PATRON_EXCEEDS_LONGOVERDUE_COU	Patron Exceeds Max Long-Overdue Threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
□ <b>11</b> 5	PATRON_EXCEEDS_LOST_COUNT	Patron exceeds max lost item threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
□ <b>12</b> 2	PATRON_EXCEEDS_OVERDUE_COUNT	Patron exceeds max overdue item threshold	CIRC FULFILL HOLD CAPTURE RENEW		False
□ <b>13</b> 30	PATRON_IN_COLLECTIONS	Patron has been referred to a collections agency			False

## Within Patron Billing Page

v	Vinchester, Joh					Refresh	Check Out	Items Out	<u>H</u> olds	<u>B</u> ill	s	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther +
Ľ	vinchester, Joh	<u> </u>						0	0/0	\$ 9.90				
(Has	s Bills)													
Cur	rrent Bills				•		•							
Т	otal Ow	ed.	9.90		Refunds Available	. 0.00			Pay Bil	I				
-					Refutius Availus R	. 0.00			Payme	nt <u>T</u> ype	Cash	~		
T	otal Che	ecked:	9.90		Credit Available:	0.00			Payme	nt <u>R</u> eceive	d: 0.00			
												<b>D</b> <sup>2</sup> + 2 + 2		<b>D</b>
									A <u>n</u>	notate Payn	nent See	<u>D</u> istributi	on Apply	<u>P</u> ayment!
	ill Patron	<u>H</u> istory										A	for Selected 1	· · · · · · · · · · · · · · · · · · ·
		<u>H</u> istory										Actions	for selected I	ransactions
#	Bala	nce Owed	Bill #	Last Billing Note	Last Billing Type	Start To	otal Billed	Total Paid	Туре	Tit	le		Payment	Pending 🛱
1	✓ 8.90		1413		Copies	201 8.9	0	0.00	groce	ry			0.00	
2	✓ 1.00		1414		Fee for DVD case	201 1.0	0	0.00	groce	ry			0.00	
Li	st Actions •	Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	Options •
Voi	ided this sessio	n: 0.00							Payment	Change		Owed	Billed	Paid
									0.00	0.00	Total:	9.90	9.90	0.00
C	nange I	Jue Op	on Paym	nent: 0.00				1			Checked:			
	Convert Chang	je to Patron C	redit								checked.	9.90	9.90	0.00

## Lost and Long Overdue Billed Transaction Color Distinctions

- Item Still Checked Out = Red
- Long Overdue = Orange\*
- Lost = Dark Red

Current Bill	s											
Total	Owed:	40.35	I	Refunds Availa	ble: 0.00		Pay Bill Payment Type Cash					
Total	Checked:	40.35	1	Credit Availabl	le: 0.00		Payment Type     Cash     V       Payment Received:	n Apply <u>P</u> ayment!				
Bill Patror	History						Red Items are still Checked Out Orange Items are Long Overdue <u>A</u> ctions <del>I</del> Dark Red Items are Lost	or Selected Transactions				
#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title	Payment Pending 🛱				
1 🗸	.15	459	10/3/13 3:40 PM	.15	0.00	circulation	Music and politics ; collected writings, 195.	. 0.00				
2 🗸	35.00	460	10/3/13 3:42 PM	35.00	0.00	circulation	A companion to Mozart's piano concertos	0.00				
3 🗸	5.20	108	8/5/13 10:04 AM	5.20	0.00	circulation	Critical entertainments : music old and new	0.00				

Both the color distinctions and indicators are customizable. To customize, a change to circ.css (for the color) and lang.dtd (for the indicator) are required.

\*When the 6 Month Overdue Mark Long-Overdue trigger event definition is enabled

Winchester, Johr				Refres	sh <u>C</u> heck Out	<u>I</u> tems Out	Holds	<u>B</u> ills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
						0	0/0	\$ 9.90			
(Has Bills)					······ <b>v</b>						
Current Bills											
Total Ow	ed: 9.90	Sumr	nary of 🚽 s Ava	ilable: 0.0	0		Pay Bill				
		total	owed to		_		Payment	<u>Т</u> уре	Cash 🔊	/	
Total Che	cked: 9.90	) the lil	orary Availa	able: 0.0	0		Payment	Received:	0.00		
							Anno	tate Payment	See <u>D</u> istributi	ion Apply	<u>P</u> ayment!
<u>B</u> ill Patron	<u>H</u> istory								Actions	s for Selected 1	Fransactions
# Balar	ce Owed Bill	# Last Billing No	te Last Billing T	Type Start	Total Billed	Total Paid	Туре	Title		Payment	Pending 🖽
1 🗸 8.90	1413		Copies	201 8		0.00	grocery			0.00	
2 1.00	1414	4	Fee for DVD	case 201 1	1.00	0.00	grocery			0.00	
List Actions •	Chec <u>k</u> All <u>U</u> nch	neck All Check All Refun	ls Print Bills							Receipt	<u>O</u> ptions •
Voided this session	: 0.00						Payment C	hange	Owed	Billed	Paid
Change [	)ue Upon I	Payment: 0.0	)			Pending:	0.00	.00 <b>Tot</b>	al: 9,90	9.90	0.00
Convert Chang	•	,	_					Che	cked: 9.90	9.90	0.00

#### If the patron is due a refund: Refund Available – Balance Owed = Total Owed

Field	Fields, Dorian						Check Out	ltems Out	<u>H</u> olds	Bi	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •		
rieit	is, Donali							1	0/0	\$ 16.5	0					
(Maxim	ium Bills) (	Has Bills)														
Curre	nt Bills															
Tot	tal Ow	od.	-18.50	1	Refunds Availab	le: 35	00		Pay Bill							
		eu.	-10.50		Refutius Availab	ie. 55.	00		Payment <u>T</u> ype Cash ∨							
Tot	tal Ch	ecked:	16.50	Credit Available: 0.00					Payment <u>R</u> eceived: 000							
									□ A <u>r</u>	notate Pay	ment See	e <u>D</u> istribut	tion Apply	<u>P</u> ayment!		
Bill F	atron	<u>H</u> istory								Dark Red It	ems are Los	t <u>A</u> ction	is for Selected	Transactions		
#	Bala	ince Owed	Bill #	Last Billing Note	Last Billing Type	Start T	otal Billed	Total Paid	Туре	Ti	tle		Payment	Pending 🛱		
1	✓ 15.0	0	1417		Copies	201 15	i.00	0.00	groce	ry			0.00			
2	✓ 1.50		1412		Copies	201 6.	50	5.00	groce	ry			0.00			
3	-35.	00	1419			201 0.	00	35.00	circu	ation Ar	thur's tree h	ouse	0.00			
<u>L</u> ist A	Actions *	Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	Options •		
Voide	Voided this session: 0.00											Owed	Billed	Paid		
Ch	Change Due Upon Payment: 0.00								0.00	0.00	Total:	-18.50	21.50	40.00		
	-	•	•	ient. 0.00						-	Checked:	16.50	21.50	5.00		
<u>C</u> o	onvert Chan	ge to Patron Ci	redit													

Fields	, Dorian				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	<u>E</u> d	lit	<u>M</u> essages	<u>O</u> ther •
	, bonan						1	0/0	\$ 16.50				
(Maximu	ım Bills) (Has Bills)												
Curren	t Bills												
Tot	al Owed:	-18.50		Refunds Availa	ble: 35.00			Pay Bill					
								Paymen	t <u>T</u> ype	Cash	~		
Tot	al Checked:	16.50	By d	lefault, all	e: 0.00			Paymer	t <u>R</u> eceived:	0.00	]		
			but t	he refund							] • • • • • •		<b>D</b> 11
			linei	tems are				A <u>n</u> n	otate Paymen	t See D	istributio	on Apply	<u>P</u> ayment!
0.11.0			chec	ked.									
<u>B</u> ill Pa	etron <u>H</u> istory								ark Red Items	are Lost	Actions f	for Selected T	ransactions
#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start Tota	l Billed	Total Paid	Туре	Title			Payment	Pending 🛱
1	✓ 15.00	1417		Copies	201 15.00		0.00	grocen	/			0.00	
2	✓ 1.50	1412		Copies	201 6.50		5.00	grocen				0.00	
3	-35.00	1419			201 0.00		35.00	circula	tion Arthur	's tree hou	se	0.00	
List A	tions ▼ Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	Options *
Voided	this session: 0.00							Payment	Change	C	Owed	Billed	Paid
Cha	nge Due Up	on Paym	nent: 0.00				Pending:	0.00	0.00 To	otal: .	-18.50	21.50	40.00
	nvert Change to Patron C	•							C	hecked:	16.50	21.50	5.00

- Check All = check all billing lineitems
- Uncheck All = uncheck all billing lineitems
- Check All Refunds = check the refund lineitems
  - Note: Selecting the **Check All Refunds** button will not automatically uncheck the billable lineitems

Fields	, Dorian	1				Refresh	<u>C</u> heck Out	Items Out	<u>H</u> olds	B	lills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther +
Ticlus	, Donan							1	0/0	\$ 16.5	50			
(Maximu	m Bills)	(Has Bills)			1 7									
Current	Bills													
Tota	al O	wed:	-18.50		Refunds Availabl	e: 35.0	0		Pay Bi					
<b>-</b> .			46.50						Payme	ent <u>T</u> ype	Cash	,	~	
lota	al Cl	necked:	16.50		Credit Available:	0.00	)		Payme	ent <u>R</u> eceiv	/ed: 0.00			
									Ar	notate Pa	vment Se	e <u>D</u> istribut	tion Apply	<u>P</u> ayment!
<u>B</u> ill Pa	tron	<u>H</u> istory								Dark Red	ltems are Lo:	t <u>A</u> ction	s for Selected 1	<b>Transactions</b>
#	В	alance Owed	Bill #	Last Billing Note	Last Billing Type	Start To	tal Billed	Total Paid	Туре	e T	litle		Payment	Pending 🛱
1	✓ 15	i.00	1417		Copies	201 15.	00	0.00	groce	ery			0.00	
2	🖌 1.	50	1412		Copies	201 6.5	0	5.00	groce	ery			0.00	
3	-3	5.00	1419			201 0.0	0	35.00	circu	lation A	rthur's tree h	ouse	0.00	
List Ac	tions *	Chec <u>k</u> All	Uncheck All	Check All Re <u>f</u> unds	Print Bills								Receipt	Options *
Voided	this ses	sion: 0.00							Payment	Change		Owed	Billed	Paid
Cha	hange Due Upon Payment: 0.00							Pending:	0.00	0.00	Total:	-18.50	21.50	40.00
	-	ange to Patron Ci	-								Checked	16.50	21.50	5.00

- By default, Evergreen will go straight down the selected billed lineitems to apply the user's payment.
- Staff can select specific lineitems to apply the payment.
- Staff can also resort the order of the lineitems in the list.

Current Bills										
Total Owed:	45.19	Refun	ds Available	: 0.00	Pay Bi Paymo	ll ent <u>T</u> ype	Cash	~	]	
Total Checked:	45.19	Credit	t Available:	0.00	Paymo	ent <u>R</u> eceived				
					□ A <u>r</u>	notate Paym	ent See	<u>D</u> istributio	n Apply	<u>P</u> ayment!
Bill Patron History						ms are still Ch ed Items are Lo		<u>A</u> ctions f	or Selected	Transactions
# Balance Owed	Bill #	Last Billing Note	Last Billing Type	S Total Billed	Total Paid	Туре	Title		Payment	Pending 🖽
_ < 2.00	1386	SYSTEM GENERATED	Lost Materials Pr	2 10.00	8.00	circulatio	on Shattere	d : a novel	0.00	
70	1389	System Generated Ov	Overdue materials	270	0.00	circulatio	on In the ta	ll, tall grass	; 0.00	
_ 2.50	1391		Copies	2 2.50	0.00	grocery			0.00	
> 39.99	1393	SYSTEM GENERATED	Lost Materials Pr	2 39.99	0.00	circulatio	on Dragons	eye 🛛	0.00	
List Actions • Chec <u>k</u> All	<u>U</u> ncheck A	II Check All Re <u>f</u> unds	Print Bills						Receipt	<u>Options</u> •
Voided this session: 0.00					Payment	Change		Owed	Billed	Paid
Change Due U	pon Pav	ment: 0.00		Pending:	0.00	0.00	Total:	45.19	53.19	8.00
Convert Change to Patron							Checked:	45.19	53.19	8.00

Winc	hester, Jo	hn				Refre	sh <u>C</u> heck O	ut _ <u>I</u> tems Out	Holds	<u>B</u> il	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
								0	0/0	\$ 9.90				
(Has Bill	s)													
Curren	t Bills													
Tot	al Ov	ved:	9.90		Refunds Available	0.0	0		Pay Bi					
Tet		مدادمهاء	0.00		Credit Available:	• •	•		Paymo	ent <u>T</u> ype	Cash	Y		
ΙΟ	ai Ch	ecked:	9.90		Credit Available:	0.0	U		Paymo	ent <u>R</u> eceive	ed: 0.00			
				n the <b>Total Bi</b> header to sort	<b>lled</b> or <b>Total Paid</b> t numerically	L			□ A <u>r</u>	inotate Payı	ment See	e <u>D</u> istributio	on Apply	<u>P</u> ayment!
<u>B</u> ill Pa	atron	<u>H</u> istory										<u>A</u> ctions	for Selected 1	Fransactions
#	Bal	ance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Туре	Tit	tle		Payment	Pending 🛱
1	✓ 8.90	)	1413		Copies	201	8.90	0.00	groce	ery			0.00	
2	✓ 1.00	)	1414		Fee for DVD case	201	1.00	0.00	groce	ry			0.00	
List A	ctions •	Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	<u>O</u> ptions •
Voided	l this sessi	on: 0.00							Payment	Change		Owed	Billed	Paid
Cha	ande	Due Ur	on Pavn	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
	-	ge to Patron C	•								Checked:	9.90	9.90	0.00

Winchester, John		_	Refresh	<u>Check Out</u>	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Winchester, John					0	0/0	\$ 9.90			
(Has Bills)				▼I						
Current Bills										
Total Owed:	9.90	Refunds Available:	0.00			Pay Bill				
		6 H 6 H 1				Payment	са Туре Са	ish v	,	
Total Checked:	9.90	Credit Available:	0.00			Payment	Received: 0.0	0		
	Click on the <b>Total B</b> column header to sor					Anno	otate Payment	See <u>D</u> istributi	on Apply	<u>P</u> ayment!
Bill Patron History								Actions	for Selected 1	Transactions
# Balance Owed	Bill # Last Billing Note	Last Billing Type	Start Tot	al Billed	Total Paid	Туре	Title		Payment	Pending 🛱
1 🗸 8.90	1413		201 8.90		0.00	grocery			0.00	
2 🗸 1.00	1414	Fee for DVD case	201 1.00		0.00	grocery			0.00	
						on you	do not se ar staff cli elected the	ient, ma	ke sure	
List Actions • Chec <u>k</u> All	Uncheck All Check All Refunds	Print Bills							Receipt	Options *
Voided this session: 0.00						Payment C	hange	Owed	Billed	Paid
Change Due Up	oon Payment: 0.00				Pending:	0.00	).00 Total:	9.90	9.90	0.00
Convert Change to Patron C	•						Chec	ked: 9,90	9.90	0.00

Winchester, John		Refresh	<u>Check Out</u>	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Whenester, som				0	0/0	\$ 9.90			
(Has Bills)	<b>▼</b>		▼I						
Current Bills									
Total Owed: 9.90	Refunds Available	: 0.00			Pay Bill	_		_	
Tatal Charlesde 0.00	Credit Available:	0.00			Payment	t <u>Type</u> Ca	sh 🗸	,	
Total Checked: 9.90	Credit Available:	0.00			Payment	Received: 0.0	0		
	k on the <b>Total Billed</b> or <b>Total Paid</b> mn header to sort numerically	1			Anno	otate Payment	See <u>D</u> istributi	on Apply	<u>P</u> ayment!
Bill Patron History							<u>A</u> ctions	for Selected T	Transactions
# Balance Owed Bill #	Last Billing Note Last Billing Type	Start Tot	al Billed	Total Paid	Туре	Title		Payment	Pending 🛱
<b>1 ✓</b> 8.90 1413	Copies	201 8.90		0.00	grocery			0.00	
2 🗸 1.00 1414	Fee for DVD case	201 1.00		0.00	grocery			0.00	
Then click List Save Column (					on you	do not se ar staff cli elected the :	ent, ma	ke sure	
List Actions • Check All Uncheck	k All Check All Re <u>f</u> unds Print Bills							Receipt	Options *
Voided this session: 0.00					Payment C	hange	Owed	Billed	Paid
Change Due Upon Pa	avment: 0.00			Pending:	0.00	).00 Total:	9.90	9.90	0.00
Convert Change to Patron Credit	,					Check	ed: 9,90	9.90	0.00

Field	ls, Doriar	1				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	Holds			<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
(Maxim	um Bills)	(Has Bills)						1	0/0	\$ 16.	.50			
(11033111	iann onio,	(rius onis)			🔻		•							
Curren	nt Bills —										_			
Tot	tal O	wed:	-18.50		Refunds Availab	le: 35.0	0		nmary nd ov		Cash		/	
Tot	tal C	necked:	16.50		Credit Available:	0.00		to th	ne pat	ron	red: 0.00	``		
									A <u>i</u>	notate Pa	ayment See	<u>D</u> istributi	ion Apply	<u>P</u> ayment!
<u>B</u> ill P	atron	<u>H</u> istory								Dark Red	Items are Lost	<u>A</u> ctions	s for Selected 1	ransactions
#	B	alance Owed	Bill #	Last Billing Note	Last Billing Type	Start To	tal Billed	Total Paid	Туре		Title		Payment	Pending 🛱
1	✓ 1	5.00	1417		Copies	201 15.	)0	0.00	groc	ery			0.00	
2	✓ 1.	50	1412		Copies	201 6.5	)	5.00	groc	ery			0.00	
3	-3	5.00	1419			201 0.0	)	35.00	circu	lation A	Arthur's tree ho	ouse	0.00	
<u>L</u> ist A	Actions *	Chec <u>k</u> All	<u>U</u> ncheck All	Check All Re <u>f</u> unds	Print Bills								Receipt	<u>O</u> ptions •
Voide	d this ses	sion: 0.00							Payment	Change		Owed	Billed	Paid
Ch	ande	Due Ur	on Pavm	ent: 0.00				Pending:	0.00	0.00	Total:	-18.50	21.50	40.00
	-	ange to Patron C	-								Checked:	16.50	21.50	5.00
		-												

Fields, Dorian				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
ricius, Doriali						1	0/0	\$ 16.50			
(Maximum Bills) (Ha	is Bills)										
Current Bills			♥		•						
Total Owe	ed: -18.50	)	Refunds Availab	le: 35.00	•		nmary o nd owe	1	ash	v	
Total Che	cked: 16.50		Credit Available	: 0.00			ne patro	n .		*	
							Annot	ate Payment	See <u>D</u> istribut	tion Apply	<u>P</u> ayment!
<u>B</u> ill Patron	listory						Dar	k Red Items are	e Lost <u>A</u> ction	is for Selected 1	Fransactions
# Baland	e Owed Bill #	Last Billing Note	Last Billing Type	Start Tota	l Billed	Total Paid	Туре	Title		Payment	Pending 🛱
1 🖌 15.00	1417		Copies	201 15.00	)	0.00	grocery			0.00	
<b>2 √</b> 1.50	1412		Copies	201 6.50		5.00	grocery			0.00	
<b>3</b> -35.00	1419			201 0.00		35.00	circulatio	on Arthur's t	ree house	0.00	
							d lineite <b>ng</b> will c.		e e		
List Actions •	Chec <u>k</u> All	All Check All Refunds	Print Bills							Receipt	Options *
Voided this session:	0.00						Payment Ch	ange	Owed	Billed	Paid
Change D	ue Upon Par	yment: 0.00				Pending:	0.00 0.0	00 Total	-18.50	21.50	40.00
Convert Change	• •							Chec	ked: 16.50	21.50	5.00

Fields, Dorian				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	s <u>i</u>	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Tielus, Donan						1	0/0	\$ 16.50				
(Maximum Bills) (Has Bill	)											
Current Bills			▼		<b>*</b>							
Total Owed:	-18.50		Refunds Availat	ole: 35.00	•		nmary nd ow		Cash	v	,	
Total Check	d: 16.50		Credit Available	: 0.00		to th	ne pati	on				
							A <u>n</u>	notate Paym	0.00	<u>D</u> istributi	on Apply	<u>P</u> ayment!
<u>B</u> ill Patron <u>H</u> istor								Dark Red Iter	ms are Lost	<u>A</u> ctions	for Selected 1	Fransactions
# Balance Ow	ed Bill #	Last Billing Note	Last Billing Type	Start Tota	l Billed	Total Paid	Туре	Title	e		Payment	Pending 🛱
1 🗸 15.00	1417		Copies	201 15.00	)	0.00	groce	ry			0.00	
2 🗸 1.50	1412		Copies	201 6.50		5.00	groce	ry			0.00	
3 -35.00	1419			201 0.00		35.00	circul	ation Arth	nur's tree ho	ouse	0.00	
	Salance Owed	l will be a	negative value	2.		Refun <b>Pendi</b> in pinl	<b>ng</b> wil		•			<b>`</b>
List Actions • Chee	<u>c</u> All <u>U</u> ncheck All C	Check All Re <u>f</u> unds	Print Bills								Receipt	Options *
Voided this session: 0.00							Payment	Change		Owed	Billed	Paid
Change Due	Upon Payme	ent: 0.00				Pending:	0.00	0.00	Total:	-18.50	21.50	40.00
Convert Change to Pa	•								Checked:	16.50	21.50	5.00

Worthington, William			Refresh (	Check Out	<u>l</u> tems Out	t <u>H</u> olds	<u>B</u> il	ls l	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Worthington, William				(	)	0/0	\$ 0.00				
			🔻	····· <b>*</b>							
Current Bills	0.00	Refund	ls Available	: 0.00		Pay Bil	l ent Type				
Total Checked:	0.00	Credit	Available:	.36	ľ	Summary patron cr available	y of edit	Cash 0.00 nt See	 Distributi		<u>P</u> ayment!
Bill Patron History									<u>A</u> ctions	for Selected T	ransactions
# Balance Owed	Bill #	Last Billing Note	Last Billing Type	S Total	Billed	Total Paid	Туре	Title		Payment	Pending 🛱
List Actions • Check All	Uncheck All	Check All Refunds	Print Bills							Receipt	Options •
Voided this session: 0.00						Payment			Owed	Billed	Paid
Change Due U	oon Payı	ment: <del>0.00</del>			Pending:	0.00	0.00	Total:	0.00	0.00	0.00
✓ <u>C</u> onvert Change to Patron C	Credit							Checked:	0.00	0.00	0.00

#### Billing a Patron

#### There are two ways to bill a patron:

- **1. Bill patron** = adds a new billing lineitem to the patron's account.
- 2. Add Billing (Actions for Selected Transactions → Add Billing) = adds additional bills to an already existing billing lineitem.

#### 1<sup>st</sup> Way to Bill a Patron: Bill Patron

Winchest	er John				Refresh	<u>Check Out</u>	Items Out	<u>H</u> olds	<u>B</u> ill	s	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther +
winchest	er, John						0	0/0	\$ 9.90				
(Has Bills)													
Current Bill	5												
Total	- I			Refunds Available	e: 0.00			Pay Bi	1				
	Click	<b>Bill Patron</b>						Payme	ent <u>T</u> ype	Cash	v		
Total	buttor	1		Credit Available:	0.00			Payme	ent <u>R</u> eceive	d: 0.00			
									<u>notate</u> Payn	nont See	<u>D</u> istributio	an Annhu	<u>P</u> ayment!
									inotate Payn	nent Sec	<u>D</u> istributio	Арру	r ayment.
<u>B</u> ill Patron	<u>H</u> isto	ry									<u>A</u> ctions	for Selected T	ransactions
#	Balance Ov	ved Bill #	Last Billing Note	Last Billing Type	Start Tota	al Billed	Total Paid	Туре	e Tit	le		Payment	Pending 🛱
1 🗸	8.90	1413		Copies	201 8.90		0.00	groce	ery			0.00	
2 ~	1.00	1414		Fee for DVD case	201 1.00		0.00	groce	ery			0.00	
List Action	s • Che	c <u>k</u> All <u>U</u> ncheck All	Check All Refunds	Print Bills								Receipt	<u>O</u> ptions +
Voided this	session: 0.0	0						Payment	Change		Owed	Billed	Paid
Chano	ae Due	Upon Payr	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
-	Change to P									Checked:	9.90	9.90	0.00

			Bill Patron Wizard	- • ×
Winchester, Joh	n :32682333874354			
Create Bill				
Location	Apex Branch			
Transaction Type	Grocery	~		
Billing Type	Copies	~		
Amount	0.10			
Note				
			<u>C</u> ancel	<u>Submit this Bill</u>

9		Bill Patron Wizard – 🗆 🗙
Winchester, Joh	n :32682333874354	
Create Bill		
Location	Apex Branch	
Transaction Type	Grocery 🗸	
Billing Type	Copies 🗸	Two Transaction Types will appear:
Amount Note		<ul> <li>Grocery - bills that staff manually apply to the patron's account</li> <li>Circulation - system generated charges added to a patron's account</li> <li>Since the Circulation Transaction Type is system generated, this option is grayed out in the dropdown menu.</li> <li>Evergreen generates these charges based on various policies, library settings, and other configurations set up by Administration.</li> </ul>

٩		Bill Pat	ron Wizard	- 🗆 🗙
Winchester, John	n :32682333874354			
Create Bill Location Transaction Type Billing Type Amount Note	Apex Branch Grocery V Copies V 0.10		<ul> <li>Administrators define the Billing Type options that appear in the dropdown.</li> <li>Billing Type "Misc" appears by default in the system.</li> </ul>	S Submit this Bill

#### Billing Types

- Admin  $\rightarrow$  Server Administration  $\rightarrow$  Billing Types
- Billing Types also include the system generated fees
- Default Price is optional

Billing Types New Billing Type Delete Sele								
Cont	ext (	Org Unit APEX -						
Back Next Filter								
$\checkmark$	#	Name	Or	Org Unit E		Default Price		
	1	Overdue Materials	CC	ONS				
	2	Long Overdue Collection Fee	СС	ONS				
	3	Lost Materials				8		
	4	Lost Materials Processing Fee						
	5	System: Deposit		Name	Tote Bag			
	6	System: Rental		Org Unit	APEX	•		
	7	Damaged Item		Default Price	5.00			
	8	Damaged Item Processing Fee		Delault Flice	5.00			
	9	Notification Fee	Ĩ	Cancel	Save			
	10	Long-Overdue Materials	Ľ					
	11	Long-Overdue Materials Processing Fee	CC	ONS				
	12	Misc	СС	ONS				
	13	Fax	AF	PEX		1.00		
	14	ILL	AF	PEX		2.00		
	15	Library mug	СС	ONS		4.50		
	16	Copies	СС	ONS		0.10		
	17	DVD in Drop Box	CC	ONS		2.00		

		Bill Patro	on Wizard 🛛 🗖 🗖	×
Winchester, John	n :32682333874354			
Create Bill				
Location	Apex Branch			
Transaction Type	Grocery 🗸			
Billing Type	Copies 🗸			
Amount	0.10		• If the Billing Type selected has a	
Note			<ul> <li>Default Price, the Amount will fill in automatically.</li> <li>If no Default Price is defined, then the Amount field will remain blank.</li> <li>Staff can manually enter any amount.</li> <li>Staff can change a Default Price.</li> <li>Select the Billing Type first, then enter the Amount.</li> </ul>	
			<u>C</u> ancel <u>S</u> ubmit thi	s Bill

0		Bill Patron Wizar	rd		×
Winchester, Joh	n :32682333874354				
Create Bill Location Transaction Type Billing Type Amount Note	Apex Branch Grocery V Copies V 0.10	a • H (( • V ss	Staff can write as much de about this billing as necess Free text and no character f (that I've reached). Very helpful tool for frontle staff when a patron doesn't understand how/why he ow ibrary a \$9.00 Misc Groce	ary. limit ine t ves the	
			<u>C</u> ancel	<u>Submit this</u>	Bill

0			Bill Patron Wizard – 🗖 🗙
Winchester, Joh	n :32682333874354		
Create Bill			
Location	Apex Branch		
Transaction Type	Grocery	~	
Billing Type	Copies	~	
Amount	0.10		
Note			
			Click Submit this Bill
			-
			<u>C</u> ancel <u>Submit this Bill</u>

## 2<sup>nd</sup> Way to Bill a Patron: Add Billing

Win	heste	r, John				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> i	lls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther +
vviii	ineste	,						0	0/0	\$ 9.90				
(Has Bil	ls)													
Currer	nt Bills				1 *									
Tot	al (	Owed:	9.90		Refunds Available	: 0.00			Pay Bi	1				
									Payme	ent <u>T</u> ype	Cash		1	
Tot	al (	Checked:	9.90		Credit Available:	0.00			Payme	ent <u>R</u> eceive	ed: 0.00			
									Δr	inotate Pay	ment See	<u>D</u> istributi	ion Apply	Payment!
										inotate r uy				
<u>B</u> ill P	atron	<u>H</u> istory					Either	click Ac	ctions	for		Actions	s for Selected	Transactions
#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start Tota	Selecte	ed Tran	sactio	ns	tle		Payment	Pending ₽
1	J	8.90	1413	Last bining Note	Copies	201 8.90		0.00		······			0.00	renaing L+
2		1.00	1413		Fee for DVD case	201 1.00		0.00	groce				0.00	
									<b>j</b>					
1:+ 4	ctions	Charle All	Uncheck All	Check All Refunds	Print Bills								Dessint	Ontingo
LISUA	cuons	• Chec <u>k</u> All	Uncheck All	Check All Rejunds	Print Dilis								Receipt	Options •
Voide	d this s	ession: 0.00							Payment	Change		Owed	Billed	Paid
Cha	and	e Due Ur	on Pavn	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
	-	Change to Patron C	-								Checked:	9.90	9.90	0.00
	ivert	change to Patron C	reuit											

# Add Billing

Winchester, Joh					Refres	h <u>C</u> h	heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> il	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther +
Third ester you								0	0/0	\$ 9.90				
(Has Bills)														
Current Bills														
Total Ow	ed:	9.90		Refunds Available	e: 0.00	)			Pay Bill					
									Payme	nt <u>T</u> ype	Cash		·	
Total Che	ecked:	9.90		Credit Available:	0.00	)			Payme	nt <u>R</u> eceive	ed: 0.00			
										notate Payı	ment Se	e <u>D</u> istribut	ion Apply	Payment!
										iotate r ayi		- <u>-</u> 15thbut	Арру	Layment
Bill Patron	<u>H</u> istory					F	Tither (	click Ac	etions f	or		Action	s for Selected	Transactions
# Bala	nce Owed	D:11 #	Last Dilling Mate	Last Dilling Turns	Start T			d Tran			tle	_		
# Bala 1 ✓ 8.90	nce Owed	Bill # 1413	Last Billing Note	Last Billing Type Copies	201 8			0.00			tie		0.00	Pending 🛱
2 ✓ 0.90		1415		Fee for DVD case	201 0			0.00	groce groce				0.00	
					201111				9,000	1			0.00	
						C	)r Riol	ht-Click	r on a s	electe	d linei	tem		
							Ji Kigi		t on a b	ciccic				
List Actions •	Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills									Receipt	Options •
	CHCC <u>k</u> All		Check Air Ne <u>r</u> unus										Neccipi	
Voided this session	n: 0.00								Payment	Change		Owed	Billed	Paid
Change I	Due Ur	on Paym	ent: 0.00					Pending:	0.00	0.00	Total:	9.90	9.90	0.00
Convert Chance	•	•									Checked	9.90	9.90	0.00
<u>e</u> onnen onung														

# Add Billing

Winchester, John				Refresh	<u>Check Out</u>	Items Out	Holds	Bill	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Whichester, John						0	0/0	\$ 9.90				
(Has Bills)			1									
Current Bills					•							
Total Owed	: 9.90		Refunds Availabl	e: 0.00			Pay Bi					
							Payme	nt <u>T</u> ype	Cash		,	
Total Check	ed: 9.90		Credit Available:	0.00			Payme	ent <u>R</u> eceive	ed: 0.00			
								notate Payr	ment See	<u>D</u> istributi	on Apply	Payment!
								notate i ayi		<u>-</u>		Layment
Bill Patron Histo	ory				Fither	click A	rtions	for		Actions	for Selected	Transactions
# Balance C	wed Bill #	Last Billing Note	Last Billing Type	Start Tot		ed Tran		_	le	-	Payment	Pending 🖽
1 ✓ 8.90	1413	Last binning Hote	Copies	201 8.90		0.00	aroce				0.00	r chung -+
<b>2</b> ✓ 1.00	1414		Fee for DVD case	201 1.00		0.00	groce				0.00	
			Show in Cat	talog								
			Show Jtem Void All Bill		Or Rig	ht-Click	x on a s	selecte	d lineit	tem		
	<b>G</b> 1		Befund									
	Sele	ct Add Billing	Add gilling Full Qetails									
List Actions • Ch	ec <u>k</u> All <u>U</u> ncheck All	Check All Refunds	Print Bills								Receipt	Options •
Voided this session: 0.	00						Payment	Change		Owed	Billed	Paid
Change Du	e Upon Payn	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
Convert Change to									Checked:	9.90	9.90	0.00
	ration Credit											

#### Negative Charges on Patron Accounts

# Patrons with Negative Balances

• **Patrons with Negative Balances** (Admin → Local Administration → Patrons with Negative Balances) allows staff to quickly retrieve a list of all patrons with negative balances.

Patro	ns With Negative Balances	4			-			
APE>	( Apex Branch	· · · · · · · · · · · · · · · · · · ·	Select			Retrieve	<u>A</u> ctio	ons for Selected Patrons
#	Barred	Date of Birth	L Branch	First Name	Middle	Patron	Balance Owed	Last Billing Activity 🛱
1	f	2008-09-29 3:00 AM	Barnaby	Treasure	Bella		-35.00	2013-04-15 7:05 PM
2	f	1964-09-27 3:00 AM	Schmoe	Jo			-25.00	2013-04-15 6:59 PM

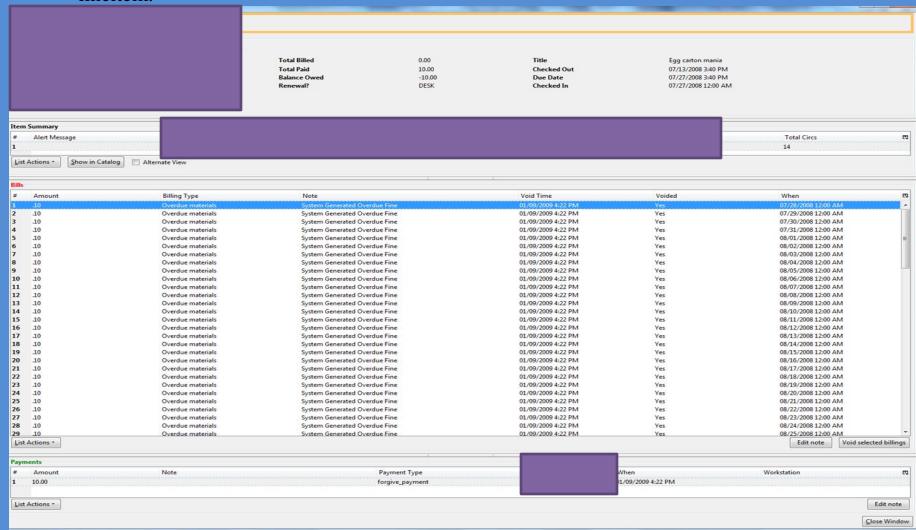
# Patron account with a positive balance that includes a negative billing lineitem.

		Acquisitions Booking										Admin (-
		👌 Search Catalog 🔹 [	Item Status 🔹 🔛 Patror	n Search 🔹 🔝 Patron	Registration •						N	Toggle
							1	-			1.00	1
						Refresh		Holds /5 S	Bills 6.00	Edit	Message	es <u>O</u> th
Note	es) (Has Bills) (Has C	verdues)					2	/ <b>3</b>	0.00			
	Bills				· · · · · · · · · · · · · · · · · · ·							
								Pay Bill				
ota	al Owed:	6.00		Refund	s Available: 10.00			Payment Ty	pe C	ash •		
ota	al Checked	: 16.00		Credit A	vailable: 0.00			Payment Re	1000			
-								100000000000000000000000000000000000000				
								Annotate	e Payment	See Distribut	ion Ap	ply <u>P</u> aym
ll Pa	tron									Action	s for Selecte	ed Transa
	Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title				Payme	ent Pendi
	✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie				0.00	
	✓ 3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted				0.00	
	✓ .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the es	sential guide to	o enjoying a	nd getting the	b 0.00	
	<ul> <li>✓ .60</li> </ul>	47665568	06/25/2009 6:47 PM	.60	00.0	circulation	The boy next door				0.00	
	✓ .10	50989984	08/23/2009 5:23 PM	.10	0.00	circulation	All night near the water				0.00	
	· .10	50989980	08/23/2009 5:23 PM	.10	0.00	circulation	The paper princess	_			0.00	
	✓ .10	50990014	08/23/2009 5:23 PM	.10	0.00	circulation	Good night, Princess Pru	ney-Toes			0.00	
	· .10	50989997	08/23/2009 5:23 PM	10	0.00	circulation	My many colored days				0.00	
	.10	50990015	08/23/2009 5:23 PM	10	0.00	circulation	The Chipmunks sing the				0.00	
	- 10 - 10	50990009 50990022	08/23/2009 5:23 PM 08/23/2009 5:24 PM	10	0.00	circulation	Belinda and the glass slip OK computer	per			0.00	
	✓ .10 ✓ .10	50990022	08/23/2009 5:24 PM	10	0.00	circulation	Vinegar Hill				0.00	
	· .10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home				0.00	
	✓ .10	50990041	08/23/2009 5:24 PM	10	0.00	circulation	Prodigal summer : a nove	el .			0.00	
	✓ .10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world, B				0.00	
	✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dance		ut Edgar Dec	as	0.00	
	✓ .10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying				0.00	
	✓ .10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina				0.00	
	✓ .10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Maisy goes camping				0.00	
	✓ .10	50989972	08/23/2009 5:22 PM	.10	00.0	circulation	The loop				0.00	
	✓ .10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the		e human-ani	imal bond	0.00	
	✓ .60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing the	Beatles hits			0.00	
	✓ 1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	OK computer				0.00	
	✓ .20 ✓ .40	54295102 54295082	10/26/2009 1:16 PM	.40 .40	.20 0.00	circulation	Jerry Baker's terrific toma	toes, sensation	hal spuds, an	a mouth-wate		
	<ul> <li>✓ .40</li> <li>✓ .40</li> </ul>	54295082 54295098	10/26/2009 1:16 PM 10/26/2009 1:16 PM	.40	0.00	circulation circulation	The bean trees : a novel Dropped dead stitch				0.00	
	<ul><li>✓ .40</li><li>✓ .40</li></ul>	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	All the living				0.00	
	<ul><li>✓ .40</li></ul>	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel				0.00	
	✓ .40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?				0.00	
	✓ .70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Kids wanna rock				0.00	
	✓ .60	75827251	01/08/2011 3:08 PM	.60	0.00	circulation	The girl who kicked the h	ornet's nest			0.00	
2	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	Egg carton mania				0.00	
	✓ 1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thriller				0.00	
	✓ 1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	Merle's door : lessons fro	m a freethinkir	ng dog		0.00	
	tions • Chec <u>k</u> All	Uncheck All Check All Refunds	s Print Bills								C	eipt <u>O</u> ptio
ided	this session: 0.00						Payme	and the second second		Owed	Billed	Paid
		pon Payment: 0.00					Pending: 0.00	0.00	Total:	6.00	17.70	11.7

uisitions Booking Admin (-) Help earch Catalog Item Status \* Patron Search • 13 Patron Registration **Toggle Hotkeys** Check Out Items Out Refresh Holds Bills Edit Messages Other 25 1/5 \$ 6.00 **Current Bills** Pay Bill Total Owed: 6.00 Refunds Available: 10.00 Payment Type Cash . Total Checked: -10.00 Credit Available: 0.00 Payment Received: 0.00 Annotate Payment See Distribution Apply Payment! Either click **Actions for** Bill Patron History Actions for Selected Transactions # Balance Owed Bill # Start **Total Billed** Total Paid Show in Catalog ₽, **Selected Transactions** 3.00 126632709 01/27/2014 3:40 PM 3.00 0.00 Show Item Details 2 3.00 126632737 01/27/2014 3:40 PM 3.00 0.00 **Void All Billings** .20 47665565 06/25/2009 6:47 PM .60 .40 circulation Keeping chickens : the essential guide to enjoying and get 3 Refund .60 .60 4 47665568 06/25/2009 6:47 PM 0.00 circulation The boy next door Add Billing 5 .10 50989984 08/23/2009 5:23 PM .10 0.00 circulation 6 .10 50989980 08/23/2009 5:23 PM .10 0.00 circulation Full Details Select Full Details 7 .10 50990014 08/23/2009 5:23 PM .10 0.00 circulation 0.00 8 .10 50989997 08/23/2009 5:23 PM .10 0.00 circulation 0.00 9 .10 50990015 08/23/2009 5:23 PM .10 0.00 circulation The Chipmunks sing the Beatles hits 0.00 10 .10 50990009 08/23/2009 5:23 PM .10 0.00 circulation Belinda and the glass slipper 0.00 11 .10 50990022 08/23/2009 5:24 PM .10 0.00 circulation OK computer 0.00 12 .10 50990031 08/23/2009 5:24 PM .10 0.00 circulation Vinegar Hill 0.00 13 .10 08/23/2009 5:24 PM .10 0.00 Sing them home 0.00 50990039 circulation 14 .10 50990041 08/23/2009 5:24 PM .10 0.00 circulation Prodigal summer : a novel 0.00 15 .10 50990027 08/23/2009 5:24 PM .10 0.00 circulation Welcome to the world, Baby Girl 0.00 16 .10 50989987 08/23/2009 5:23 PM .10 0.00 Degas and the little dancer : a story about Edgar Degas 0.00 circulation 17 .10 .10 50990002 08/23/2009 5:23 PM 0.00 circulation **Ballerina** flying 0.00 18 .10 08/23/2009 5:23 PM .10 0.00 Belinda, the ballerina 0.00 50990006 circulation 19 .10 50989992 08/23/2009 5:23 PM .10 0.00 0.00 circulation Maisy goes camping 20 .10 0.00 .10 50989972 08/23/2009 5:22 PM 0.00 circulation The loop 21 .10 50989977 08/23/2009 5:22 PM .10 0.00 Made for each other : the biology of the human-animal bond 0.00 circulation 22 .60 51822185 00/00/2000 0-13 AM 1.00 circulation The Chipmunks sing the Beatles hits 0.00 23 1.00 0.00 51822187 circulation OK computer Or Right-Click on a selected lineitem 24 .20 54295102 circulation Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri... 0.00 25 .40 54295082 circulation The bean trees : a novel 0.00 26 .40 54295098 10/26/2009 1:16 PM .40 0.00 circulation Dropped dead stitch 0.00 27 .40 .40 0.00 0.00 54295090 10/26/2009 1:16 PM circulation All the living 28 .40 54295084 10/26/2009 1:16 PM .40 0.00 Pigs in heaven : a novel 0.00 circulation 29 .40 54295075 10/26/2009 1:16 PM .40 0.00 0.00 circulation Can you keep a secret? 30 .70 0.00 .70 44940071 05/12/2009 3:10 PM 1.40 circulation Kids wanna rock 31 .60 75827251 01/08/2011 3:08 PM .60 0.00 circulation The girl who kicked the hornet's nest 0.00 · -10.0 -10.00 Egg carton man 33 1.20 125208742 0.00 The last patriot : a thriller 0.00 12/17/2013 10:04 AM 1.20 circulation 34 0.00 1.20 125208745 0.00 12/17/2013 10:04 AM 1.20 circulation Merle's door : lessons from a freethinking dog List Actions • Check All Uncheck All Check All Refunds Print Bills Receipt Options \* Voided this session: 0.00 Owed Billed Payment Change Paid Pending: -10.00 10.00 Total: 6.00 17.70 11.70 Change Due Upon Payment: 10.00 Checked: -10.00 0.00 10.00 Convert Change to Patron Credit

### Full Details

• **Full Details** shows the payment(s) forgiven and the bill(s) voided for that selected billing lineitem.



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# Wrong Workflow!

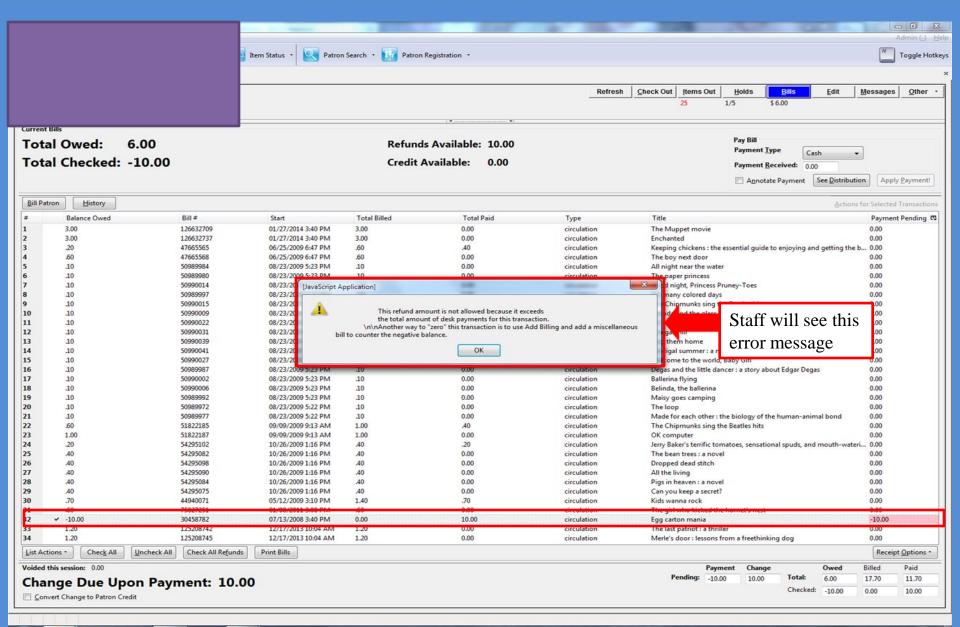
		Item Status - Rev Patron	s Search - 🔝 Patro	n Registration 🔹			N	Admin (-)
					Refresh	<u>Check Out</u> Items Out Holds Bills Ed 25 1/5 \$ 6.00	dit <u>M</u> essages	es <u>O</u> ther
rrent Bills	,			1 •		D. 07		
otal Owed:	6.00		Refund	s Available: 10.00		Pay Bill Payment <u>Type</u> Cash	•	
otal Checked:	16.00		Credit	Available: 0.00		Payment Received:		
							Арр	ply <u>P</u> aymer
ill Patron History					3	. Click Apply Payment	Actions for Selecte	ed Transac
Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title	Payme	ent Pendin
✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00	
✓ 3.00	126632737	01/27/2014 3:40 PM	3.00	0.0	circulation	Enchanted	0.00	
✓ .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and gett		
60 10	47665568 50989984	06/25/2009 6:47 PM	.60	0.00	circulation	The boy next door	0.00	
✓ .10 ✓ .10	50989980	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10	0.00	circulation circulation	All night near the water The paper princess	0.00	
· .10	50990014	08/23/2009 5:23 PM	10	0.00	circulation	Good night, Princess Pruney-Toes	0.00	
· .10	50989997	08/23/2009 5:23 PM	10	0.00	circulation	My many colored days	0.00	
✓ .10	50990015	08/23/2009 5:23 PM	10	0.00	circulation	The Chipmunks sing the Beatles hits	0.00	
✓ .10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda and the glass slipper	0.00	
✓ .10	50990022	08/23/2009 5:24 PM	10	0.00	circulation	OK computer	0.00	
✓ .10	50990031	08/23/2009 5:24 PM	.10	0.00	circulation	Vinegar Hill	0.00	
✓ .10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home	0.00	
✓ .10	50990041	08/23/2009 5:24 PM	10	0.00	circulation	Prodigal summer : a novel	00.0	
· .10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world, Baby Girl	0.00	
· .10 · .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00	
· .10	50990002 50990006	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10	0.00	circulation circulation	Ballerina flying Belinda, the ballerina	0.00	
· .10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation		0.00	
✓ .10 ✓ .10	50989992	08/23/2009 5:22 PM	.10	0.00	circulation	Maisy goes camping The loop	0.00	
✓ .10	50989977	08/23/2009 5:22 PM	10	0.00	circulation	Made for each other : the biology of the human-animal bo		
<ul><li>✓ .60</li></ul>	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing the Beatles hits	0.00	
✓ 1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	OK computer	0.00	
✓ .20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mou	th-wateri 0.00	
✓ .40	54295082	10/26/2009 1:16 PM	.40	0.00	circulation	The bean trees : a novel	0.00	
✓ .40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch	0.00	
✓ .40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	All the living	0.00	
✓ .40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel	0.00	
✓ .40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?	0.00	
<ul> <li>✓ .70</li> <li>✓ .60</li> </ul>	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Kids wanna rock	0.00	
-10.00	75827251 30458782	01/08/2011 3:08 PM 07/13/2008 3:40 PM	.60	0.00	circulation circulation	The girl who kicked the hornet's nest Egg carton mania	0.00	
<ul> <li>-10.00</li> <li>✓ 1.20</li> </ul>	125208742	12/17/2013 1			circulation	Egg carton mania The last patriot : a thriller	0.00	
✓ 1.20	123200/42	1	Click Uncl	heck All	circulation	Merle's door : lessons from a freethinking dog	0.00	
Actions • Chec <u>k</u> All	Uncheck All Check All Refunds	100000000						eipt <u>O</u> pti
d this session: 0.00		2.	Click Chee	ck All Refunds		Payment Change Ow	ved Billed	Pai
an an Dura Illa	on Payment: 0.00	V				Pending: 0.00 0.00 Total: 6.0	0 17.70	11

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When the refund is greater than money that has actually been paid, a refund is not allowed.



#### Remember: There are 2 Ways to Bill a Patron

- **Bill Patron** creates a new billing lineitem.
- Add Billing adds additional billing to an existing lineitem.
- When correcting a bill, it is best practice to **Add Billing** to an existing lineitem.
- When staff use **Bill Patron**, a new billing line is created, and it results in a positive billing line item along with the negative billing lineitem. The total may look correct, but there will be unresolved billing lineitems.

#### Bill Patron to Clear Negative Charge: Wrong Method

			_		Status (spectrum) and	-	and the second second				
			1								Admin (-) He
		N 1997	Item Status • Status • Patron	Search 🔹 🚺 Pa	tron Registration *						Toggle Hotke
		-				Refresh	<u>Check Out</u> Items Out	Holds	Bills	Edit Messag	ges Other -
						Second second	25 1	/5 \$6.0	00		
					•						
	ent Bills				2.0.02121.0222			Pay Bill			
10	tal Owed:	6.00		Refu	nds Available: 10.00			Payment Type	Cash	•	
То	tal Checked:	16.00		Credi	t Available: 0.00			Payment Recei	L		
								Annotate Pa	avment See	Distribution	pply <u>P</u> ayment!
									Junear Linear		
Bill	Patron	Select Bill Patr	ron							Actions for Selec	ted Transactions
=	Balance Owed	Dill #	start	Total Billed	Total Paid	Туре	Title			Payn	nent Pending 🛱
12	✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie			0.00	
2	<ul> <li>✓ 3.00</li> <li>✓ .20</li> </ul>	126632737 47665565	01/27/2014 3:40 PM 06/25/2009 6:47 PM	3.00	0.00	circulation	Enchanted Keeping chickens : the es	sential quide to e	nioving and of	0.00	
4	✓ .60	47665568	06/25/2009 6:47 PM	.60	0.00	circulation	The boy next door			0.00	
5	✓ .10	50989984	08/23/2009 5:23 PM	.10	0.00	circulation	All night near the water			0.00	
6	✓ .10	50989980	08/23/2009 5:23 PM	.10	0.00	circulation	The paper princess			0.00	
7	✓ .10	50990014	08/23/2009 5:23 PM	.10	0.00	circulation	Good night, Princess Prur	ney-Toes		0.00	
8	✓ 10	50989997	08/23/2009 5:23 PM	.10	0.00	circulation	My many colored days			0.00	
9	✓ .10	50990015	08/23/2009 5:23 PM	.10	0.00	circulation	The Chipmunks sing the			0.00	
10	✓ <u>10</u>	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda and the glass slip	per		0.00	
11	· 10	50990022	08/23/2009 5:24 PM	.10	0.00	circulation	OK computer			0.00	
12 13	· 10 · 10	50990031 50990039	08/23/2009 5:24 PM	.10 .10	0.00	circulation	Vinegar Hill			0.00	
14	✓ <u>10</u> ✓ <u>10</u>	50990041	08/23/2009 5:24 PM 08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home Prodigal summer : a nove			0.00	
15	¥ 10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world, Ba			0.00	
16	✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dance		Edgar Degas	0.00	
17	✓ <u>10</u>	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying			0.00	
18	✓ .10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina			0.00	
19	✓ .10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Maisy goes camping			0.00	
20	✓ .10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	The loop			0.00	
21	✓ <u>10</u>	50989977	08/23/2009 5:22 PM	.10	00.0	circulation	Made for each other : the		uman-animal b		
22	✓ .60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing the	Beatles hits		0.00	
23	✓ 1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	OK computer		2 2	0.00	
24 25	✓ .20 ✓ .40	54295102 54295082	10/26/2009 1:16 PM	.40 .40	.20 0.00	circulation	Jerry Baker's terrific toma	toes, sensational	spuds, and mo	outh-wateri 0.00 0.00	
25	<ul> <li>✓ .40</li> <li>✓ .40</li> </ul>	54295082	10/26/2009 1:16 PM 10/26/2009 1:16 PM	.40	0.00	circulation	The bean trees : a novel Dropped dead stitch			0.00	
27	<ul><li>✓ .40</li></ul>	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	All the living			0.00	
28	✓ .40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel			0.00	
29	<ul><li>✓ .40</li></ul>	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?			0.00	
30	✓ .70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Kids wanna rock			0.00	
31	✓ .60	75827251	01/08/2011 3:08 PM	.60	0.00	circulation	The girl who kicked the h	ornet's nest		0.00	_
32	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	Egg carton mania			0.00	
33	✓ 1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thriller			0.00	
34	✓ 1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	Merle's door : lessons from	m a freethinking	dog	0.00	
List	Actions • Chec <u>k</u> All	Uncheck All Check All Refunds	Print Bills							Rea	ceipt Options •
Void	ed this session: 0.00						Paymer		Contraction of the second	wed Billed	Paid
Ch	ange Due Un	on Payment: 0.00					Pending: 0.00	0.00	Total: 6	.00 17.70	11.70
									Checked: 1	6.00 17.70	1.70
	onvert Change to Patron Cre	edit									

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Mar 10 <sup>20</sup> Mar 2010 Mar 201	ansaction Type	Grocery	•				Refresh	Check Out Items Out	Holds Bills	<u>E</u> dit M	essages	Othe
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v     1.20     0.00     circulation     Merle's door : lessons from a freethinking dog     0.00       t Actions •     Check All     Uncheck All     Check All Refunds     Print Bills     Rece		.00				10.00	circulation				0.00	
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led this session: 0.00 Payment Change Owed Billed					1.20	0.00	circulation	Merle's door : lessons from	n a freethinking dog		-	
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rending: 0.00 0.00 lotal: 6.00 17.70												Paid
hange Due Opon Payment: 0.00	nange	<b>Due Upon Payn</b>	nent: 0.00					renaing: 0.00			17.70	11.70
Convert Change to Patron Credit 16.00 17.70									Checke	d: 16.00	17.70	1.70

Results: the negative bill remains on the account and now there is a new billing lineitem (with a charge of \$10.00) on the patron account.

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teame         Out         Table         Paymeth Pending Table           i         100         1155777         0127/2018 340 PM         100         00         conclusion         The Maged minit         000         000         conclusion         The Maged minit         000         000         conclusion         The Maged minit         000         000         000         conclusion         The Maged minit         000         000         000         conclusion         The Maged minit         000         conclusion         000         conclusion         000									Annotate Payment	See Distribution	Apply	2ayment!
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12 <ul> <li>10</li> <li< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></li<></ul>												
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44       > 10       5099039       08/23/2009 524 PM       10       0.00       circulation       Sing hem home       0.00         16       > 10       50990027       08/23/2009 524 PM       10       0.00       circulation       Pedigal summers: a new       0.00       0         18       > 10       50990027       08/23/2009 522 PM       10       0.00       circulation       Balerina fing       0.00       0         18       > 10       50990027       08/23/2009 522 PM       10       0.00       circulation       Balerina fing       0.00       0       0       0.00       0       0.00       0       0.00       0       0.00       0       0.00       0       0       0.00       0       0.00       0       0.00       0       0.00       0       0       0.00       0       0       0       0.00       0												
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66 <ul> <li>             0.0</li> <li>             0.0</li> <li>             circulation</li> <li>             0.00</li> <li>             circulation</li>             liculation             liculation             liculation             liculation             liculation             liculatio</ul>												_
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13 <ul> <li>6.0</li> <li>51822185</li> <li>09/09/2009 913 AM</li> <li>1.00</li> <li>0.00</li> <li>circulation</li> <li>OK</li> <li>Computer</li> <li>0.00</li> <li>Circulation</li> <li>OK</li> <li>Circulation</li> <li>OK</li> <li>Circulation</li> <licirculation< li=""></licirculation<></ul>										the state of the s		_
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25 <ul> <li>20</li> <li>54295102</li> <li>10/26/2009 116 PM</li> <li>40</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>The base 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>difference 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>difference 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>difference 's terrific tomatoes, sensational spuds, and mouth-wateri</li> <li>0.00</li> <li>circulation</li> <li>circulation</li> <li>circulation</li> <li>circulation</li> <li>circulation</li> <li>circulation</li> <li>difference 's terrific tomatoes, sensational spuds, and mouth-wateric terriculation</li> <li>circulation<th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>C DEGUES TITES</th><th></th><th></th><th></th></li></ul>									C DEGUES TITES			
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88       - 40       54295090       10/26/2009 116 PM       40       0.00       circulation       All the living       0.00         99       - 40       54295084       10/26/2009 116 PM       40       0.00       circulation       Pigs in howen: a novel       0.00         90       - 40       54295075       10/26/2009 116 PM       40       0.00       circulation       Circulation       Pigs in howen: a novel       0.00         10       - 40       54295075       10/26/2009 116 PM       40       0.00       circulation												
1       4.0       54295084       10/26/2009 11.6 PM       4.0       0.00       circulation       Pigs in heven: a novel       0.00         10       4.40       0.00       circulation       Can you keep a secret?       0.00         10       4.40       0.00       circulation       Can you keep a secret?       0.00         11       7.70       44940071       05/12/2009 31.0 PM       4.0       7.0       circulation       Kids wanna rock       0.00         12       60       7827251       01.06 (011 2.08 PM       60       0.00       circulation       Kids wanna rock       0.00         13       -10.00       30458782       07/13/2008 3.40 PM       0.00       10.00       circulation       Egg carton mania       0.00       <												
10       - 4.0       54295075       10/26/2009 1:16 PM       4.0       0.00       circulation       Can you keep a secret?       0.00         11       - 7.0       44940071       05/12/2009 3:10 PM       1.40       70       circulation       Kids wanar ock       0.00         12       - 6.0       7523251       0.00 (Victor 10, 00, 00)       circulation       Kids wanar ock       0.00         13       -10.00       30458782       07/13/2008 3:40 PM       0.00       10.00       circulation       Egg carton mania       0.00         14       - 1.20       12520174       1.20       0.00       10.00       circulation       Egg carton mania       0.00         15       - 1.20       12520174       1.20       0.00       10.00       circulation       Egg carton mania       0.00         15       - 1.20       12520174       1.20       0.00       10.00       circulation       Egg carton mania       0.00       10.00       0.00       0.00 <t< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>-</th><th></th><th></th><th></th><th></th></t<>								-				
1       - 7.0       44940071       05/12/2009 3140 PM       1.40       -7.0       circulation       Kids value arock       0.00         2       6.0       7597251       01/06/2011 308 PM       6.0       0.00       circulation       Egg carbon arises       0.00         3       -10.00       345872       07/13/2008 340 PM       0.00       10.00       circulation       Egg carbon arises       0.00         1       -155       15147612 10011 100 PM       1.40       .00       0.00       circulation       Egg carbon arises       .00         1       -155       15147612 100111 100 PM       1.40       0.00       0.00       circulation       Egg carbon arises       .00         1       155       15147612 100111 100 PM       1.40       0.00       0.00       Receipt Option       Receipt Option         1       1514       15147612 100111 100 PM       1.40       0.00       0.00       Receipt Option       Receipt Option         1       1514       15147612 100111 100 PM       1.40       0.00       0.00       Prove of the option       Prove of th												
B3       -10.00       30458782       07/13/2008 3:40 PM       0.00       10.00       circulation       Egg carton mania       0.00         List Actions -       Check All       Uncheck All       Check All Refunds       Print Bills       0.00	31	✓ .70			1.40		circulation	Kids wanna rock				
M       1.40       1.554 000       Inclusion of Maller       The last patient of Maller       0.60         List Actions •       Check All       Uncheck All       Check All Refunds       Print Bills       Receipt Options •         //olded this session: 0.00       Change Due Upon Payment: 0.00       0.00       Total:       16.00       27.70       11.70         Change Due Upon Payment: 0.00       Checked:       76.00       27.70       120	33	-10.00			0.00		circulation	The girl who kicked the Egg carton mania	hornet's nest			
Poided this session:         0.00         Payment         Change         Owed         Billed         Paid           Change Due Upon Payment:         0.00         0.00         Total:         16.00         27.70         11.70           Checked:         76.00         27.70         120         120         120         120	34	+ 1.20	125200742	12/17/2013 10:01 / 11	1.20	0.00	circulation	The last patriot - a thrill			0.00	
Change Due Upon Payment: 0.00 0.00 Total: 16.00 27.70 11.70 Checked: 26.00 27.70 170	List Actio	ons • Chec <u>k</u> All Uncheck A	All Check All Refur	nds Print Bills							Receipt	Options •
Change Due Opon Payment: 0.00	Voided thi	is session: 0.00							ent Change	Owed	Billed	Paid
Checked: 26.00 27.70 1.70	Chan	a Due Unon Pa	vmont. 0 (	0				Pending: 0.00	0.00 Total:	16.00	27.70	11.70
Convert Change to Patron Credit			yment: 0.0						Check	ed: 26.00	27.70	1.70
	Conve	ert Change to Patron Credit								20100		

2:24 PM

2/18/2014

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#### Add Billing to Clear a Negative Charge: Recommended Method

					Salarings Road to						Admin (-) He
			Item Status 🔹 💽 Patron	Search • 🚺 Patr	ron Registration 🔹						Toggle Hotke
						Refresh	Check Out Items Out		<u>Bills Edi</u>	t <u>M</u> essages	Other •
							25	1/5 \$ 6.0	0		
Curren								Pay Bill			
		6.00		Refu	nds Available: 10.00			Payment Type	Cash	•	
Tot	al Checked:	-10.00		Credi	t Available: 0.00			Payment <u>R</u> eceir		stribution Apply	/ <u>P</u> ayment!
Bill P	atron <u>H</u> istory								A	Actions for Selected	Transactions
#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title			Show in Catalo	g þ.tt
1	3.00 3.00	126632709	01/27/2014 3:40 PM	3.00 3.00	0.00	circulation	The Muppet movie			Show Item Deta	
2	.20	126632737 47665565	01/27/2014 3:40 PM 06/25/2009 6:47 PM	.60	40	circulation	Enchanted Keeping chickens : the	essential quide to en	ioving and get	Void All Billings	2
4	.60	47665568	06/25/2009 6:47 PM	.60					7.9.5	Refund	
5	.10	50989984	08/23/2009 5:23 PM	.10	Either right	-click on the s	selected line	tem or		Add Billing	
6	_10 _10	50989980 50990014	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10						Full <u>D</u> etails 0.00	
8	.10	50989997	08/23/2009 5:23 PM	.10	select Actio	ons for Select	ed Transact	ions →	1.00	0.00	
9	.10	50990015	08/23/2009 5:23 PM	.10		_				0.00	
10	.10	50990009	08/23/2009 5:23 PM	.10	Add Billing					0.00	
11	_10	50990022	08/23/2009 5:24 PM	.10		1. 1.0	5.00 5.00m			0.00	
12 13	.10 _10	50990031 50990039	08/23/2009 5:24 PM 08/23/2009 5:24 PM	.10	00.0	circulation circulation	Vinegar Hill Sing them home			0.00	
14	10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	Prodigal summer : a no	vel		0.00	
15	.10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world,			0.00	
16	.10	50989987	08/23/2009 5:23 PM	.10	00.0	circulation	Degas and the little dar	icer : a story about E	dgar Degas	0.00	
17	.10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying			0.00	
18 19	.10 .10	50990006 50989992	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10	0.00	circulation circulation	Belinda, the ballerina Maisy goes camping			0.00	
20	.10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	The loop			0.00	
21	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : t	he biology of the hu	iman-animal bon	0.00 bi	
22	.60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing th	e Beatles hits		0.00	
23 24	1.00	51822187 54295102	09/09/2009 9:13 AM	1.00	0.00	circulation circulation	OK computer			0.00 n-wateri 0.00	
24	.40	54295082	10/26/2009 1:16 PM 10/26/2009 1:16 PM	.40	0.00	circulation	Jerry Baker's terrific ton The bean trees : a nove		puds, and mouth	0.00	
26	.40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch			0.00	
27	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	All the living			0.00	
28	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a nove			0.00	
29 30	.40	54295075 44940071	10/26/2009 1:16 PM 05/12/2009 3:10 PM	.40 1.40	0.00 .70	circulation circulation	Can you keep a secret? Kids wanna rock			0.00	
31		75027251	01/00/2011 3:00 PM		0.00	circulation	The gift the kicked the	the second s		0.00	
32	✓ -10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	Egg carton mania			-10.00	
33 34	1.20	125208742 125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thrill			0.00	
-	1.20 ctions • Check All	Uncheck All Check All Refund	12/17/2013 10:04 AM	1.20	0.00	circulation	Merle's door : lessons f	rom a freethinking o	log	0.00 Receipt	t Options *
	this session: 0.00						Раул	ent Change	Owe		Paid
		on Devenents 10	00				Pending: -10.0		Total: 6.00		11.70
		on Payment: 10.	00						Checked: -10.0		10.00
<u>C</u> o	nvert Change to Patron Cre	edit							101		
									Checked: -10.0	00.0	10.00

Item Status -       Patron Search -       Item Patron Registration -         Refresh       Check Out       Items Out       Holds       Bills         25       1/5       5 6.00	Admin (-) H
Refresh     Check Out     Items Out     Holds     Edit     Mu       25     1/5     \$ 6.00	essages <u>O</u> ther
Current Bills	
Current Bills	
Current Bills	
Are you sure you would like to add a billing to bill 30458782?	
Total Checked: -10.00	
Bill Patron History	
# Balance Owed Bill # Start	
1 3.00 126632709 01/27/2014 3× 2 3.00 126632727 01/27/2014 3×	
2         3.00         126632737         01/27/2014 3x           3         .20         47665565         06/25/2009 6x	
4 .60 4765568 06/25/2009 6x	
5         .10         50989984         08/23/2009 52           6         .10         50989980         08/23/2009 52	
6         .10         50989980         08/23/2009 5:2           7         .10         5099014         08/23/2009 5:2	
8 10 50989997 08/23/2009 5.	
9 .10 50990015 08/23/2009 5:	
<b>10</b> 10 5099009 08/23/2009 5:	
11 10 50990022 08/23/2009 54	
12         10         50990031         08/23/2009 5:           13         10         50990039         08/23/2009 5:	
14 10 5099041 08/23/2009 5	
15 10 50990027 08/23/2009 5:	
16 1.0 50989987 08/23/2009 5:	
<b>17</b> 10 5099002 08/23/2009 5:	
18         10         5099006         08/23/2009 5:           19         10         5098992         08/23/2009 5:	
<b>20</b> 10 5099972 09/23/2009 5.	
<b>21</b> 10 50989977 08/23/2009 5:	
22 .60 51822185 09/09/2009 9:	
23 1.00 51822187 09/09/2009 91	
24         .20         54295102         10/26/2009 1:1           25         .40         54295082         10/26/2009 1:1	
26 .40 5425098 10/26/2009 11 Options	
$\frac{27}{28} = \frac{40}{40}$	y Message
	iviessage
<b>29</b> .40 <b>30</b> .70 <b>449400/1</b> 05/12/2009 310 THT 1 100 170 CITCAINION ROLD WITHIN TOCK	
	0.00
	-10.00
	0.00
	0.00
List Actions * Check All Uncheck All Check All Refunds Print Bills	Receipt Options *
	Billed Paid 17.70 11.70
Change Due Opon Payment: 10.00	0.00 10.00
Circles - 10.00	10.00

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					Station Sugar	· Manual And I	and the second second		and the second second	Name	
			T							A	dmin (-) He
		2	Item Status 🔹 💽 Patron	Search •	Patron Registration •					r	Toggle Hotke
		-									
							Refresh	-		<u>Bills E</u> dit <u>M</u> essages	Other •
								25	1/5 \$ 6/	00	
Curren	at Pille					d					×
10000		~~			Bill Patron Wizar	a					
		00									
Tot	tal Checked: -1	0.00									
					Summary						
					-	797	Tetel D'lle d	0.00	Tiala	Englander marie	
Bill P	Patron <u>H</u> istory						Total Billed	0.00	Title	Egg carton mania	
#	Balance Owed	Bill #	Start	Total 8	Type circul Start 07/13	ation /2008 3:40 PM	Total Paid Balance Owed	10.00 -10.00	Checked Out Due Date	07/13/2008 3:40 PM 07/27/2008 3:40 PM	
1	3.00	126632709	01/27/2014 3:40 PM	3.00		/2008 3:40 PIVI	Renewal?	-10.00	Checked In	07/27/2008 3:40 PM 07/27/2008 12:00 AM	
2	3.00	126632737	01/27/2014 3:40 PM	3.00	Finish		Kenewal		Checked In	07/27/2008 12:00 AM	
3	.20	47665565 47665568	06/25/2009 6:47 PM 06/25/2009 6:47 PM	.60 .60							
5	.10	50989984	08/23/2009 5:23 PM	.10							
6	.10	50989980	08/23/2009 5:23 PM	.10							
7	.10	50990014	08/23/2009 5:23 PM	.10	Create Bill						
8	.10	50989997	08/23/2009 5:23 PM	.10	Location	Georgia Bublic I	library Service - Profe	sciona			
9 10	.10	50990015 50990009	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10 .10		Georgia Public L	Library Service - Profe	ssiona			
11	.10	50990022	08/23/2009 5:24 PM	.10	Transaction Type	Circulation		-			
12	.10	50990031	08/23/2009 5:24 PM	.10	D'11' T	L					
13	.10	50990039	08/23/2009 5:24 PM	.10	Billing Type	Miscellaneous		-			
14	.10	50990041	08/23/2009 5:24 PM	.10	Amount	10.00				.1	
15 16	.10 .10	50990027 50989987	08/23/2009 5:24 PM 08/23/2009 5:23 PM	.10		10.00			Ente	r the Amount to	
17	.10	50990002	08/23/2009 5:23 PM	.10	Note		nd voided in error. Ad			1	
18	.10	50990006	08/23/2009 5:23 PM	.10			his transaction to zero	the	zero	out the negative	;
19	.10	50989992	08/23/2009 5:23 PM	.10		bill. DDale 2/15/	14		ahan	a and add a	
20	_10 _10	50989972	08/23/2009 5:22 PM	.10					charg	ge and add a	
22	.60	50989977 51822185	08/23/2009 5:22 PM 09/09/2009 9:13 AM	1.00					datai	led note. Click	
23	1.00	51822187	09/09/2009 9:13 AM	1.00							
24	.20	54295102	10/26/2009 1:16 PM	.40					Sub	nit this Bill	
25	.40	54295082	10/26/2009 1:16 PM	.40					540		
26	.40	54295098 54295090	10/26/2009 1:16 PM 10/26/2009 1:16 PM	.40							
28	.40	54295084	10/26/2009 1:16 PM	.40						<u>C</u> ancel <u>S</u> ubmit thi	is Bill
29	.40	54295075	10/26/2009 1:16 PM	.40							
30	.70	44940071	05/12/2009 3:10 PM	1.40	./0		circulation	Kids wanna roo		0.00	
31	.60 ✓ -10.00	75827251 30458782	01/08/2011 3:08 PM 07/13/2008 3:40 PM	.60 0.00	0.0 10.		circulation circulation	The girl who ki Egg carton ma	icked the hornet's nest	0.00	
33	1.20	125208742	12/17/2013 10:04 AM	1.20	0.0		circulation	The last patriot		0.00	
34	1.20	125208745	12/17/2013 10:04 AM	1.20	0.0	0	circulation		lessons from a freethinking	dog 0.00	
List A	Actions • Check All	ncheck All Check All Refunds	Print Bills							Receipt	Options *
Voide	ed this session: 0.00								Payment Change	Owed Billed	Paid
Ch	ange Due Unon	Payment: 10.0	0					Pending	F -10.00 10.00	Total: 6.00 17.70	11.70
		i ayment. 10.0								Checked: -10.00 0.00	10.00
	onvert Change to Patron Credit									A	

#### Corrected Patron Bill

				Collars Proper (Manual And )		-	
							Admin (-) <u>H</u> e
		Item Status + 🔍 Patron Status	Sauch a 🕅	Patron Registration *			Toggle Hotke
		a Item Status *	Search 🔹 🌃	Patron Registration +			
					Refresh	<u>Check Out</u> Items Out Holds Bil	ls <u>E</u> dit <u>M</u> essages <u>O</u> ther →
						25 1/5 \$ 6.00	
Current Bills							
Total Owed: 16.00			Re	funds Available: 0.00		Pay Bill	
						Payment <u>T</u> ype	Cash 👻
Total Checked: 16.00			Cre	edit Available: 0.00		Payment <u>R</u> eceive	ed: 0.00
						Annotate Payr	ment See Distribution Apply Payment!
						A <u>n</u> ilotate Payl	Apply Education
Bill Patron History							Actions for Selected Transactions
		_			_		
# Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title	Payment Pending 🛱
1	126632709 126632737	01/27/2014 3:40 PM 01/27/2014 3:40 PM	3.00 3.00	0.00 0.00	circulation	The Muppet movie Enchanted	0.00 0.00
3 × .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation circulation	Keeping chickens : the essential guide to enjo	
4 .60	47665568	06/25/2009 6:47 PM	.60	0.00	circulation	The boy next door	0.00
5 🗸 .10	50989984	08/23/2009 5:23 PM	.10	0.00	circulation	All night near the water	0.00
<b>6</b> ✓ .10	50989980	08/23/2009 5:23 PM	.10	0.00	circulation	The paper princess	0.00
7 .10	50990014	08/23/2009 5:23 PM	.10	0.00	circulation	Good night, Princess Pruney-Toes	0.00
8 ✓ .10 9 ✓ .10	50989997 50990015	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10 .10	0.00 0.00	circulation circulation	My many colored days The Chipmunks sing the Beatles hits	0.00
<b>10 v</b> .10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda and the glass slipper	0.00
11 4 .10	50990022	08/23/2009 5:24 PM	.10	0.00	circulation	OK computer	0.00
12 ~ .10	50990031	08/23/2009 5:24 PM	.10	0.00	circulation	Vinegar Hill	0.00
13 🗸 .10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home	0.00
14 🖌 .10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	Prodigal summer : a novel	0.00
15 🗸 .10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world, Baby Girl	0.00
<b>16</b> ✓ .10 <b>17</b> ✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00 0.00	circulation	Degas and the little dancer : a story about Edg	gar Degas 0.00 0.00
<b>17</b> ✓ .10 <b>18</b> ✓ .10	50990002 50990006	08/23/2009 5:23 PM 08/23/2009 5:23 PM	.10 .10	0.00	circulation circulation	Ballerina flying Belinda, the ballerina	0.00
19 4 .10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Maisy goes camping	0.00
20 🗸 .10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	The loop	0.00
21 🗸 .10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the hum	nan-animal bond 0.00
22 🗸 .60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing the Beatles hits	0.00
23    1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	OK computer	0.00
<b>24</b> ✓ .20 <b>25</b> ✓ .40	54295102 54295082	10/26/2009 1:16 PM 10/26/2009 1:16 PM	.40 .40	.20 0.00	circulation circulation	Jerry Baker's terrific tomatoes, sensational sp The bean trees : a novel	uds, and mouth-wateri 0.00 0.00
<b>25</b> • .40 <b>26</b> • .40	54295082 54295098	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch	0.00
27 4.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	All the living	0.00
28 🗸 .40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel	0.00
<b>29</b> ✓ .40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?	0.00
<b>30</b> ✓ .70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Kids wanna rock	0.00
31 ✓ .60 32 ✓ 1.20	75827251	01/08/2011 3:08 PM	.60	0.00	circulation	The girl who kicked the hornet's nest	0.00
32 ✓ 1.20 33 ✓ 1.20	125208742 125208745	12/17/2013 10:04 AM 12/17/2013 10:04 AM	1.20 1.20	0.00 0.00	circulation circulation	The last patriot : a thriller Merle's door : lessons from a freethinking do	0.00 g 0.00
55 4 1.20	123200743	12/17/2013 10:04 AIM	1.20	0.00	circulation	mene's door ressons nom a neethinking do	3 0.00
		Duint Bills					Bassint C. r.
List Actions • Check All Uncheck All	Check All Refund	ls Print Bills					Receipt Options *
Voided this session: 10.00						Payment Change	Owed Billed Paid
Change Due Upon Payı	ment: 0.0	0				Pending: 0.00 0.00 1	Total: 16.00 17.70 1.70
Convert Change to Patron Credit						(	Checked: 16.00 17.70 1.70
Convert Change to Patron Credit							

# Patron with Negative Billing: More Complicated Example

• This next example is more involved, because an attempt was made to correct the mistake and resulted in making matters worse.

	king									dmin (-) Hel
	• 🤖 Item Status • 💽 Patron	Search 🔹 🔝 Patron Registration	· •							oggle Hotkey
										3
				Refresh	Check Out Items	Out Holds	Bills \$ -1.20	Edit	Messages	Other •
		1. viii								
Current Bills Total Owed: -1.20		Refunds Availa	ble: 5.00			Pay Bill				
Total Checked: 3.80		Credit Availabl				Payme	nt <u>Type</u> Ca nt <u>Received</u> :	sh 👻	]	
							notate Payment	See <u>D</u> istributio	n Apply P	aymenti
Bill Patron History						Red Iten	ns are still Checked	Out Actions f	or Selected Ti	ransactions
# Balance Owed Bill #	Start			Туре	Title				Payment P	ending 🛤
1         -5.00         120368267           2         ~ 3.80         125051798	08/22/2013 3:06 PM 12/12/2013 10:26 AM			circulation grocery	The light and the	glory			0.00 0.00	
	I Refunds Print Bills								Receipt	
Voided this session: 0.00 Change Due Upon Payment:	0.00				Pending:		0 Total:	Owed -1.20		Paid 5.00
Change Due Opon Payment:	0.00						Checked	3.80	3.80	0.00

First, let's take a look at the **Full Details** for the negative billing lineitem.

Current Bills Total Owed: -1.20 Total Checked: 3.80	s <u>B</u> ooking Catalog - 💽	Item Status - Patron	Refur	non Registration •	Refresh	<u>Check Out</u> <u>Items O</u> 3	0/0 Pay Bill Payment <u>1</u> Payment <u>1</u>	Casi	•	Admin (-) Help M Toggle Hotkey sssages Other - Apply Bayment
Bill Patron History	Bill # 120368267 125051798	Start 08/22/2013 3:05 PM 12/12/2013 10:26 AM	Total Billed 0.00 3.80	Total Paid 5.00 0.00 Either right-cl: select Actions Full Details			item or	re still Checked O	<u>Show</u> Show	illing
List Actions • Check All Uncheck All Voided this session: 0.00 Change Due Upon Payr Convert Change to Patron Credit	Check All Refunds	Print Bills				Pending:	Payment Chang 0.00 0.00	e Total: Checked:	-1.20 3.	Receipt Options *       Iled     Paid       80     5.00       80     0.00

#### Full Details

The full details of the original bill show that part of the bill was paid in cash, part of the bill was forgiven, and all the bills were voided. This resulted in a \$5.00 credit to the patron.

				The second se				-
								_
			Total Billed	0.00	Title	The light and the glo	v	
			Total Paid	5.00	Checked Out	08/22/2013 3:06 PM	,	
Start	08/22/2013	3:06 PM	Balance Owed	-5.00	Due Date	09/05/2013 11:59 PM		
Finish			Renewal?	DESK	Checked In			
-								
Item S	Summary							
=	Alert Message						Total Circs	E\$
1							7	
List A	Actions • Show in Catalog Altern	nate View						
				TC T				
Bills								
#	Amount	Billing Type	Note		Void Time	Voided	When	17
1	.20	Overdue materials	System Generated Overdue Fine	System: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/13/2013 11:59 PM	
2	.20	Overdue materials	System Generated Overdue Fines	System: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/14/2013 11:59 PM	
3	.20	Overdue materials	System Generated Overdue Fines	System: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/18/2013 11:59 PM	
4	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/24/2013 11:59 PM	
5	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	10/04/2013 11:59 PM	
6	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	10/03/2013 11:59 PM	
7	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	10/02/2013 11:59 PM	
8	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	10/01/2013 11:59 PM	
9	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/30/2013 11:59 PM	
10	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/28/2013 11:59 PM	
11	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/27/2013 11:59 PM	
12	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/26/2013 11:59 PM	
13	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/25/2013 11:59 PM	
14 15	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/23/2013 11:59 PM	
15	.20 .20	Overdue materials Overdue materials	System Generated Overdue Fines System Generated Overdue Fines		12/12/2013 10:23 AM 12/12/2013 10:23 AM	Yes Yes	09/21/2013 11:59 PM 09/20/2013 11:59 PM	
17	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/19/2013 11:59 PM	
18	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/17/2013 11:59 PM	
19	.20	Overdue materials	System Generated Overdue Fines		12/12/2013 10:23 AM	Yes	09/16/2013 11:59 PM	
20	.20	Overdue materials	System Generated Overdue Fine	Jacin Toloco Ton Backbarre	02/17/2014 3:26 PM	Yes	09/06/2013 11:59 PM	
21	.20	Overdue materials	System Generated Overdue Fine		02/17/2014 3:26 PM	Yes	09/07/2013 11:59 PM	
22	.20	Overdue materials	System Generated Overdue Fine		02/17/2014 3:26 PM	Yes	09/09/2013 11:59 PM	
23	.20	Overdue materials	System Generated Overdue Fine		02/17/2014 3:26 PM	Yes	09/10/2013 11:59 PM	
24	.20	Overdue materials	System Generated Overdue Fine		02/17/2014 3:26 PM	Yes	09/11/2013 11:59 PM	
25	.20	Overdue materials	System Generated Overdue Fine		02/17/2014 3:26 PM	Yes	09/12/2013 11:59 PM	
List A	Actions •						Edit note Void selected bi	illings
Payme	ents			-				
#	Amount	Note	Payme	nt Type				<b>E</b>
1	1.20			ayment				
	3.80			_payment				
	127323							
Liet	Actions •						Edite	note
List A	(citoris						Edit	note
							<u>Close</u> W	Vindow
							Liose W	muow
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The staff member chose **Bill Patron** (creating a new lineitem) when trying to correct this bill, instead of using **Add Billing** to the existing bill lineitem. The result was a new billing lineitem with a \$3.80 charge.

	A line of the second	Encourse VotantPropert Manufelli	and the second se	
	s <u>B</u> ooking Catalog + A Item Status - R Patro	on Search 🔹 📊 Patron Registration 🔹		Admin (-) <u>H</u> elj
			Refresh Check Out Items Out	Holds Edit Messages Other -
		▼▼	2	0/0 3-1.20
Current Bills Total Owed: -1.20		Refunds Available: 5.00		Pay Bill
Total Checked: 3.80		Credit Available: 0.00		Payment Iype     Cash       Payment <u>Received:</u> 0.00
				Anotate Payment See Distribution Apply Payment
Bill Patron History				Red Items are still Checked Out Actions for Selected Transactions
# Balance Owed Bi	ill # Start	Total Billed Total Paid	Type Title	Show in Catalog
	20368267         08/22/2013 3:06 PM           25051798         12/12/2013 10:26 AM	0.00 5.00 3.80 0.00	circulation The light and the glory grocery	Show <u>I</u> tem Details <u>V</u> oid All Billings
				Add Billing
List Actions - Check All Uncheck All	Check All Refunds Print Bills			
List Actions  Check All Uncheck All Voided this session: 0.00			Paym	Receipt Options -
Change Due Upon Payme	ent: 0.00		Pending: 0.00	0.00 <b>Total:</b> -1.20 3.80 5.00
Convert Change to Patron Credit				Checked: 3.80 3.80 0.00

### Full Details of the \$3.80 Bill Lineitem

Start		013 10:26 AM	Total Paid	3.80 0.00 3.80		
Finish			Renewal?			
Bills						
=	Amount	Billing Type	Note		Voided	When 🛤
	3.80	Miscellaneous	BALANCE ACCOUNT TO ZERO AFTER FI	INE FORGIVE AND CLAIMS RETURNED.	No	12/12/2013 10:26 AM
List A	actions *					Edit note Void selected billings
Payme	ents					
#	Amount N	Note	Payment Type	Staff	When	Workstation
List A	actions •					Edit note
						<u>C</u> lose Window

Now we know how the patron bill got to this state: a negative balance of \$1.20, \$3.80 owed, and a refund due of \$5.00.

	Nines Pauline	the reading			-	and the second second		-	
	itions <u>B</u> ooking	Statur a Datas	Search + 🔝 Patron I	Perintration *					Admin (-) He
	ren catalog • 🔤 item	Patron :	Search • Mil Patron	Registration					
					Defeash	Check Out   Home Out	uette Dite		
					Refresh	Check Out Items Out	Holds         Bills           0/0         \$ -1.20	<u>E</u> dit <u>M</u>	essages <u>O</u> ther •
Current Bills				I •					
Total Owed: -1.20			Refunds	Available: 5.00			Pay Bill		
Total Checked: 3.80				vailable: 0.00			Payment <u>Type</u> Payment <u>R</u> eceived:	Cash 👻	
Total checked. 5.00			ciculty				Annotate Payment	See Distribution	Apply Payment!
								-	
Bill Patron History	Bill #	Start	Total Billed	Total Paid	Туре	Title	Red Items are still Chec	ced Out <u>A</u> ctions fo	Payment Pending
-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glor	y .		0.00
2 ✓ 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery				0.00
List Actions • Check All Uncheck All Voided this session: 0.00	Check All Refunds	Print Bills				D	nent Change	Owed B	Receipt Options *
Change Due Upon Payr	ment: 0.00					Pending: 0.00	0.00 Total	-1.20	3.80 5.00
Convert Change to Patron Credit							Chec	ced: 3.80	3.80 0.00

### An Attempt to Refund the \$5.00

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	sitions <u>B</u> ooking		6130						Admin (-) Help
	arch Catalog 🔹 📇 Item	Status • Notes Patron	Search • Mile Patron Regis	tration •					Toggle Hotkey:
									· · · · · · · · · · · · · · · · · · ·
					Re	efresh Check Out Items Out	Holds Bills	<u>E</u> dit <u>M</u>	lessages Other •
	J								
Current Bills Total Owed: -1.20							Pay Bill		
Total Checked: -5.00				vailable: 5.00			Payment Type	Cash 👻	
Total Checked: -5.00			Credit Avai	ilable: 0.00		2 Clists A reals	D		
						3. Click Apply	Payment		Apply Payment!
Bill Patron History	Twent's	1.4.2010		Theory and a	and the second		Red Items are still Cho	cked Out Actions fo	or Selected Transactions
# Balance Owed 1	Bill # 120368267	Start 08/22/2013 3:06 PM	Total Billed 0.00	Total Paid 5.00	Type circulation	Title The light and the glory			Payment Pending 🛱 -5.00
2 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery				0.00
		1. <b>(</b>	Click Unched	ck All					
List Actions • Check All Uncheck All	Check All Refunds	2. 0	Click Check	All Refunds					Receipt Options *
Voided this session: 0.00						Payme Pending: 5.00	nt Change		Billed Paid 3.80 5.00
Change Due Upon Pay	ment: 5.00					· · · · · · · · · · · · · · · · · · ·			0.00 5.00
Sonvert Change to Patron Credit									

The refund attempt results in an error message, because the staff member is trying to refund more money than what was actually paid.

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	itions <u>B</u> ooking									Admin (-) H
	rch Catalog 🔹 📇 Iten	n Status 🔹 🔀 Patri	on Search 🝷 📊 Patron R	egistration •						Toggle Hotk
					Refresh	Check Out Items		<u>B</u> ills	Edit Me	ssages <u>O</u> ther •
						3	0/0	\$ -1.20		
Current Bills				▼						
Total Owed: -1.20			Refunds	Available: 5.00			Pay Bill Paymen	Type		
Total Checked: -5.00			Credit Av	vailable: 0.00				Lype Casl	-	
								tate Payment	ee <u>D</u> istribution	Apply <u>P</u> ayment!
Bill Patron History # Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title	Red Items	are still Checked (		Selected Transactions Payment Pending
1 -5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the	e glory			5.00
2 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery				0	0.00
		(1				×				
		(JavaScript	Application]							
				ount is not allowed because it excee						
			\n\nAnother way to '	t of desk payments for this transact "zero" this transaction is to use Add	ion. I Billing and add a miscellane	ous				
			bill to counter the negative ba	OK						
				OK						
		_								
List Actions • Check All	Check All Refunds	Print Bills								Receipt Options •
Voided this session: 0.00						Pending	Payment Char	-	Owed Bill	
Change Due Upon Payr	ment: 5.00					Pending:	-5.00 5.00	Checked:	-1.20 3.8	
Convert Change to Patron Credit										

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#### To correct the account, first remove the -\$5.00 by using Add Billing.

	sitions <u>B</u> ooking			Seatings: Road Rd		-				A	dmin (-) <u>H</u> elp
	irch Catalog 🔹 📇 I	item Status 🔹 💽 Patron	Search 🔹 📊 Pat	tron Registration 🔹							Foggle Hotkey
					Refresh (	<u>Check Out</u> <u>Items Ou</u> 3		<u>B</u> ills \$ -1.20	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Current Bills Total Owed: -1.20 Total Checked: -5.00	,			nds Available: 5.00 it Available: 0.00				ype Cash eceived: 0.00 te Payment S		) on Apply !	Payment!
Bill Patron History							Red Items a	e still Checked C		for Selected T	
# Balance Owed 1	Bill # 120368267	Start 08/22/2013 3:06 PM	Total Billed 0.00	5.00	Type circulation	Title The light and the glo	ory			ow in Catalog ow <u>I</u> tem Detai	
2 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery					id All Billings	
				Either right-click of select <b>Actions for</b> <b>Add Billing</b>					Ad	fund d <u>B</u> illing II <u>D</u> etails	
List Actions • Check All Uncheck All	Check All Refunds	Print Bills								Receipt	Options +
Voided this session: 0.00						Pa Pending: 5	yment Change	e Total:	Owed		Paid 5.00
Change Due Upon Payı	ment: 5.00					- chang.	5.00	Checked:	-1.20 -5.00	3.80 0.00	5.00

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	sitions <u>B</u> ooking urch Catalog • 🦲 Ite	m Status 🔹 💽 Patron	Search 🔹 📊 Patron I	Registration *								dmin ( <u>-</u> ) <u>H</u> e Toggle Hotke
				Registration								roggie riotke
	<u> </u>					Refresh <u>C</u> he	eck Out	Out Holds	Bills	<u>E</u> dit	Messages	Other •
							3	0/0	\$ -1.20			
Current Bills				▼▼								
Total Owed: -1.20			Refunds	s Available: 5.00				Pay Bil Payme		Cash ·		
Total Checked: -5.00			Credit A	vailable: 0.00					ent <u>R</u> eceived:			
								An	notate Payment	See <u>D</u> istribut	ion Apply	Payment!
Bill Patron History				🍪 Bill Patron	(2) - respectively.							×
# Balance Owed	Bill #	Start	Total Billed	Bill Patron	u would like to add	a hilling to hill 12	0368267?					
1         ✓ -5.00           2         3.80	120368267 125051798	08/22/2013 3:06 PM 12/12/2013 10:26 AM	0.00 3.80	Alle you sulle you		a bining to bin 12						
		Clic	ck Yes	Options <u>Y</u> es	No						Copy Me	sage
		Che	K IES									
List Actions • Chec <u>k</u> All Uncheck All	Check All Re <u>f</u> unds	Print Bills									Receipt	Options •
Voided this session: 0.00							Pending:		ange 10 Total:	Owed	Billed	Paid
Change Due Upon Pay	ment: 5.00						r enung:	-5.00 5.0		-1.20 ed: -5.00	3.80	5.00 5.00
Convert Change to Patron Credit												

	and the second	-	STREET, SQUARE,	Sugar ( Monad )	-		-			
	sitions <u>B</u> ooking									Admin (-) <u>F</u>
	irch Catalog 🔹 📇 I	Item Status 🔹 🔀 Patron	Search 🔹 🎆 Patron Registrati	on •						Toggle Hot
						Refresh Check Out	Items Out			Messages Other
	1						3	0/0 \$ -1	1.20	
Current Bills			1 🔻							
Total Owed: -1.20			Refunds Avai	lable: 5.00				Pay Bill Payment <u>T</u> ype	Cash 🗸	7
Total Checked: -5.00			Credit Availa	ble: 0.00				Payment <u>R</u> ece	cusii •	
								Annotate P	Payment See <u>D</u> istribution	on Apply <u>P</u> ayment!
Bill Patron History				🕘 Bill Patron Wi						- 0 <b>X</b>
# Balance Owed	Bill #	Start	Total Billed		zard	_				
1 ✓ -5.00 2 3.80	120368267 125051798	08/22/2013 3:06 PM 12/12/2013 10:26 AM	0.00 3.80	Mauldin, Joar	Bowen : 21001	002926650				
2 5.00	125051750	12,12,2015 10.20 AW	5.50	Summary						
				-	0368267	Total Billed	0.00	Title	The light and t	he glory
					culation	Total Paid	5.00	Checked Out		
				Start 08, Finish	/22/2013 3:06 PM	Balance Owed Renewal?	-5.00	Due Date Checked In	09/05/2013 11:	59 PM
						nene nan		checked in		
				Create Bill						
				Location	Georgia Publ	lic Library Service - Profe	ssiona			
				Transaction Ty	circulation		-			
				Billing Type	Miscellaneou	US	•			
				Amount	5.00		_			
				Note	\$1.20 was pa	id on fines and \$3.80 was	; 4	E	Enter the An	nount to
						en all fines on this transa ided. This created a crea		Z	ero out the	negative
					of \$5.00. Ad	ding back \$5.00 to zero t ind correct the account.		c	harge and a	add a
					DDale 2/18/1				etailed not	
								S	bubmit this	Bill
										, 2111
									<u>C</u> ancel	Submit this Bill
List Actions • Chec <u>k</u> All Uncheck All	Check All Refunds	Print Bills								
Voided this session: 0.00						р	ending: -5.00		Owed Total: -1.20	Billed Paid 3.80 5.00
Change Due Upon Pay	ment: 5.00						-5.00	5.00	Checked: -5.00	0.00 5.00
<u>Convert Change to Patron Credit</u>										

The -\$5.00 lineitem is off of the account. Now, we need to clear up the remaining positive bill that the patron does not actually owe.

	-				and such sugar. ( in the sum									- 0 ×
	ions <u>B</u> ooking													Admin ( <u>-</u> ) <u>H</u> el
	:h Catalog 🔹 📇 1	ltem Status 🔹 🖳	Patron Searc	:h 🔹 🔢 Patron F	Registration •								N	Toggle Hotkey
														:
							Refresh	<u>Check Out</u>	Items Out	Holds	<u>B</u> ills	<u>E</u> dit	Messages	<u>O</u> ther •
								2	s u	0/0	\$ 3.80			
Current Bills					▼▼									
Total Owed: 3.80				Refunds	Available: 0.00					Pay Bill Payment	<u>T</u> ype	ash	•	
Total Checked: 3.80				Credit Av	vailable: 0.00						Received: 0		•	
										Annot	ate Payment	See <u>D</u> istribu	ition Appl	/ <u>P</u> ayment!
Bill Patron History										Red Items a	are still Checke	Out Actio	ns for Selected	Transactions
# Balance Owed	Bill #	Start	Тс	otal Billed	Total Paid	Туре		Title		_				t Pending 🛱
1	125051798	12/12/2013 10:	26 AM 3.8	80	0.00	grocery	,						0.00	
List Actions  Check All Uncheck All	Check All Refunds	Print Bills												t Options *
Voided this session: 0.00	mont. 0.00							Pen	Payme oding: 0.00	ent Chang 0.00	e Total:	Owed 3.80	Billed 3.80	Paid 0.00
Change Due Upon Payr	nent: 0.00										Checke	d: 3.80	3.80	0.00

- To remove a positive bill, the bill would need to be paid or voided.
- In this case, the bill should not be paid with any of the **Payment Type** options, because the patron did not owe this portion of the bill.
- The patron in this example did owe \$1.20, which was paid in cash on the original bill.
- The \$3.80 billing lineitem that was added in error (while trying to fix the account) should be voided. This billing lineitem was not actually owed to the library and shouldn't have been added.

# Void All Billings

			Test and Support   Margarit Mar						
	Booking							Admin (-) <u>H</u> e	
ch Ca	atalog 🔹 🔚 Item Status 🔹	Patron Search • 🔢 Pa	atron Registration 🔹					Toggle Hotke	
				Refresh Check Out	Out Holds	Bills	Edit Mes	sages Other -	
				<u>Refresh</u> <u>Check Out</u> <u>Items</u>	0/0	\$ 3.80	<u>E</u> un <u>m</u> es	oayes <u>O</u> ulei	
Current Bills			🕈 🖣						
Total Owed: 3.80		Refu	nds Available: 0.00		Pay Bill	Tuno			
Total Checked: 3.80		Credi		Payment Iype Cash  Payment Received: 0.00					
					Annot	tate Payment Se	ee <u>D</u> istribution	Apply <u>P</u> ayment!	
Bill Patron History					Red Items a	are still Checked O	ut Actions for Se	elected Transactions	
# Balance Owed Bill #		Total Billed	Total Paid	Type Title				Catalog 🤉 🛱	
1 ✓ 3.80 12505	1798 12/12/20	013 10:26 AM 3.80	Either right-cli	ck on the selected line	item or		Show Ito Void All	em Details Billings	
			-	for Selected Transac			<u>R</u> efund Add <u>B</u> ill		
			Void All Billin				Full Det	-	
			Volu Ali Dilili	gs					
List Actions - Chec <u>k</u> All Uncheck All Che	eck All Re <u>f</u> unds Print Bills	]					ſ	Receipt <u>O</u> ptions •	
Voided this session: 0.00					Payment Chang	je	Owed Bille		
Change Due Upon Paymer	nt: 0.00			Pending:	0.00 0.00	Total:	3.80 3.80		
Convert Change to Patron Credit						Checked:	3.80 3.80	0.00	

# Alternative, Select Full Details

Selecting Full Details may be necessary, if you only need to void part of the charges.

		-		Contract Sugar, 1. Manual 1.		-							
	itions <u>B</u> ooking									Adr	min (-) <u>H</u> el		
	rch Catalog 🔹 🖲	ch Catalog • 👜 Item Status • 🍳 Patron Search • 🔢 Patron Registration •											
					Refresh	Check Out	Out Holds	Bills	Edit	Messages	Other -		
						3	0/0	\$ 3.80	Ean	messages	Quici		
Current Bills							Pay Bill						
Total Owed: 3.80			Refund	s Available: 0.00			Payment ]	[ype Cash		1			
Total Checked: 3.80			Credit A	Available: 0.00			Payment	Received: 0.00		J			
		Anotate Payment See Distribution											
Bill Patron History													
Bill Patron History # Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title	Ked Items a	re still Checked C		or Selected Tra	ansactions		
1	125051798	12/12/2013 10:26 AN		0.00	grocery	The			_	ow In Catalog ow Item Details			
										d All Billings			
					1' 1 .1	1 / 11	• ,			und d <u>B</u> illing			
				Either right-	click on the s	elected III	neitem of	•		l <u>D</u> etails			
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List Actions • Chec <u>k</u> All Uncheck All	Check All Refunds	Print Bills								Receipt O	ptions •		
Voided this session: 0.00							Payment Chang	e	Owed		Paid		
Change Due Upon Payı	ment: 0.00					Pending:		Total:	3.80	3.80	0.00		
Convert Change to Patron Credit								Checked:	3.80	3.80	0.00		

- In this example, we want to void the entire lineitem. So, we will select Void All Billings.
- A new Void All Billings window opens asking, "Are you sure?"
- Optional: If staff choose to void selected fees via the Full Details page, then select the **Void Selected Billings** button.

	Void All Billings	1
	Are you sure you would like to void all billings on bill 1424?	
	Options	
Click Yes	Yes No Copy Message	

# Patron Account Now has Zero Balance

When you return to the patron's **Bills** screen, you will see that all bills have been removed and a \$0.00 account balance.

	and the second second second	The second secon				_ 0 ×
	s <u>B</u> ooking					Admin (-) <u>H</u> el
	Catalog 🔹 🔤 Item Status 🔹	Patron Search • 👬 Patron Registration •				Toggle Hotkey
	· · · · · · · · · · · · · · · · · · ·					:
				Refresh Check Out Items Out	<u>H</u> olds <u>B</u> ills <u>E</u> dit	Messages Other -
				3	0/0 \$ 0.00	
Current Bills		¥	• • • • •			
Total Owed: 0.00		Refunds Available:	0.00		Pay Bill	
Total Checked: 0.00		Credit Available:	0.00		Payment Type Cash	-
Total checked. 0.00		creat Available.	0.00		Payment <u>R</u> eceived: Annotate Payment See <u>D</u> istri	huting Anatu Daymont
					Anotate Payment See Distri	Apply <u>P</u> ayment!
Bill Patron History					Act	ions for Selected Transactions
# Balance Owed Bil	ill # Start	Total Billed Tota	l Paid Type	Title		Payment Pending 🖽
List Actions • Check All Uncheck All C	Check All Refunds Print Bills					Receipt Options *
Voided this session: 0.00					nent Change Owed	Billed Paid
Change Due Upon Payme	ent: 0.00			Pending: 0.00		0.00 0.00
<u>C</u> onvert Change to Patron Credit					Checked: 0.00	0.00 0.00

# Pay Bill

Winchester, John				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ill	ls 🔤	<u>E</u> dit <u>I</u>	Messages	<u>O</u> ther •
Winchester, Som						0	0/0	<mark>\$</mark> 9.90				
(Has Bills)					<b>V</b> 1							
Current Bills												
Total Owe	l: 9.90		Refunds Available	: 0.00			- Pay Bill					
							Payme	nt <u>T</u> ype	Cash	¥		
Total Chec	ked: 9.90		Credit Available:	0.00			Payme	nt <u>R</u> eceive	ed: 0.00		l.	
							ΠAn	notate Payr	ment See	<u>D</u> istributio	n Apply	<u>P</u> ayment!
								lotate i aji		_		
<u>B</u> ill Patron <u>H</u> is	tory									<u>A</u> ctions f	or Selected 1	Fransactions
# Balance	Owed Bill #	Last Billing Note	Last Billing Type	Start Tot	al Billed	Total Paid	Туре	Tit	le		Payment	Pending 🖽
1 🗸 8.90	1413		Copies	201 8.90		0.00	groce	Ŋ			0.00	
2 • 1.00	1414		Fee for DVD case	201 1.00		0.00	groce	Ŋ			0.00	
List Actions • C	nec <u>k</u> All Uncheck All	Check All Refunds	Print Bills								Receipt	Options •
Voided this session:	).00						Payment	Change		Owed	Billed	Paid
Change Due Upon Payment: 0.00					Pending:	0.00	0.00	Total:	9.90	9.90	0.00	
Convert Change to									Checked:	9.90	9.90	0.00

# Pay Bill

Winchester	lohn				Refre	esh <u>C</u> l	heck Out	<u>I</u> tems Out	Holds	<u>B</u> i	lls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
whichester	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,							0	0/0	\$ 9.90				
(Has Bills)														
Current Bills						*								
Total C	Owed:	9.90		Refunds Availa	Selec	t a Pa	ymen	t	Pay Bill Payme	nt <u>T</u> ype	<b>C</b> 1			
Total C	Checked:	9.90		Credit Availabl Type from the dropdown options.				Payme	nt <u>R</u> eceive notate Pay					
				L	1									
<u>B</u> ill Patron	<u>H</u> istory											<u>A</u> ctions	for Selected	Transactions
#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Bill	ed	Total Paid	Туре	Ti	tle		Payment	Pending 🛱
1 🗸	8.90	1413		Copies	201	8.90		0.00	groce	ŋ			0.00	
2 ~	1.00	1414		Fee for DVD case	201	1.00		0.00	groce	ſy			0.00	
List Actions	• Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills									Receipt	Options •
Voided this se	ession: 0.00								Payment	Change		Owed	Billed	Paid
Change Due Upon Payment: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00				
-	Change to Patron C	-									Checked:	9.90	9.90	0.00

- Cash

- Cash
- Check

#### Payment Type Check

- When staff apply a Check payment, a Check Info window will open.
- Enter the Check Number.
- Recommend that staff also enter the Check Number into the Note field: Note is a column option in Payments; Check Number is not (need to run a report to see check number otherwise).

	Chec	k Info	- 🗆 🗙
- Check Informat	ion		
Check Number			
Note			
		<u>C</u> ancel	Submit this Information

- Cash
- Check
- Credit Card

#### Payment Type Credit Card

• Accommodates the process of credit card payments through Evergreen or externally (Not pictured: in **Process where?** dropdown choose either **Process payment through Evergreen** or **Record externally processed payment**)

	Credit Card Information – 🗖 🗙
Credit Card Info	
Process where?	Process payment through Evergreen
Credit Card Number	
Expire Month	
Expire Year	
Optional fields	
Billing name (first)	William
Billing name (last)	Worthington
Address	9562 Lighted Tree Lane
City, town or village	Jasper
State or province	PA
ZIP or postal code	31201
Note	
	<u>C</u> ancel <u>Submit this Info</u>

# Payment Type Credit Card

- Payment Processing Services: AuthorizeNet, PayflowPro, PayPal, Stripe
- A few of the Library Settings (Admin  $\rightarrow$  Local Administration  $\rightarrow$  Library Settings Editor)
  - Allow Credit Card Payments: value set to True
  - **Enable xxx Payments** (where xxx = payment processing service, such as **Enable PayPal Payments**): value set to True
  - Name Default Credit Processor: value set to site's default credit processor (such as PayPal)
  - **xxx Test Mode** (where xxx = payment processing service): if set to True, then payment will not really be processed, stays in test mode
  - And other payment processing service specific library settings (some of the values for these settings are provided by the service)
- Evergreen Version 2.6: Accepting payments with Stripe (a processing service that lets sites take credit card payments without the card information touching the sites' servers). Release Notes: <u>https://tinyurl.com/olf7h44</u>
  - Launchpad Ticket #1227871: <u>https://bugs.launchpad.net/evergreen/+bug/1227871</u>

# Example of Patron OPAC Account with PayPal

Account Summary	Items Che	ecked Out	Holds	Account Prefe	erences	My Lists					
Account Summary	KED OUT (4) DLD (9)	View All View All View All							Patrons can fines in full		Fines: \$42.69 Pay Fines
Note title				Content			7				
Left Library Card at AP	EX branch	You can pic	k it up at the	APEX Circ desk [	ELR 2014-	03-04 @ APEX	1				
Fines Payment	ls										
Fines											
Title		Author			Checkout [		Due Date		e Returned	Balance Owed	Pay Fines
Shattered : a novel		DuPree, Kia.			03/04/2014		03/28/2014		es accruing)	\$2.00	
In the tall, tall grass		Fleming, Der			03/05/2014		03/01/2014		es accruing)	\$0.70	<b>V</b>
<u>Dragonseye</u>		McCaffrey, A	nne.	(	03/05/2014	ł	03/19/2014	(ine	es accruing)	\$39.99	

Pay selected fines

# Example of Patron OPAC Account with PayPal

Account Summary	Items Checked Out	Holds	Account Preferences	My Lists				
Account Summa	Ŋ					Patrons ca	an nav	Fines: \$42.69
ITEMS CURRENTLY CHEC	CKED OUT (4) <u>View All</u>					fines in fu		Pay Fines
ITEMS CURRENTLY ON H	OLD (9) <u>View All</u>							
ITEMS READY FOR PICK	JP (0) <u>View All</u>							
Note title			Content		]			
Left Library Card at Al	PEX branch You can pi	ck it up at the	APEX Circ desk [ ELR 2014-	03-04 @ APEX ]	]			
Fines Paymen	ts							
Fines								×
Title	Author		Checkout D	)ate	Due Date	Date Or, they c	UWCU	Pay Fines
Shattered : a novel	DuPree, Kia		03/04/2014		03/28/2014	(fine selected I		۲
In the tall, tall grass	-	enise, 1950-	03/05/2014		03/01/2014	(fines accruing)	\$0.70	
<u>Dragonseye</u>	<u>McCaffrey.</u>	Anne.	03/05/2014		03/19/2014	(fines accruing)	\$39.99	

# Example of Patron OPAC Account with PayPal

Fines	Payments		
Billing Infor	rmation		Selected fines you
First Name Last Name			Name A Shattered : a novel
Email Addres	SS	n <u>Update</u>	In the tall, tall grass
Street Addre	SS	in	Dragonseye
City			Total amount to pa
State or Prov	vince		Click <b>Cancel</b> to go
ZIP or Postal	l Code		
Credit Card	Information		
Credit Card	#		
Security Cod	le		
Expiration M	onth	January 🔻	
Expiration Ye	ear	2014 🔻	
		Next Cancel	

are paying for:

Name	Amount
Shattered : a novel	\$2.00
in the tall, tall grass	\$0.70
Dragonseye	\$39.99

ay: \$42.69

back and (un)select other fines.

Important! You must have a printed receipt to be eligible for a refund on lost items (regulations allow for no exceptions).

To ensure your necessary receipt information is not lost, enter your email address above and a receipt will be emailed to you. Otherwise, make certain you have a printed receipt in hand before closing the payment receipt screen.

- Cash
- Check
- Credit Card
- Patron Credit

# Payment Type Patron Credit

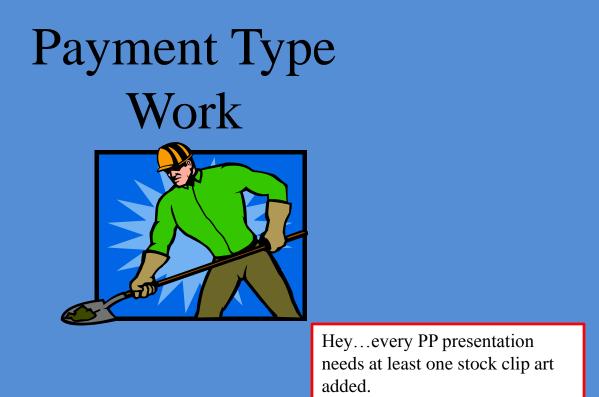
	I Owed: I Checked:	9.90 9.90		Refunds Availa Credit Availab		00 00			Paym	ill ent <u>Typ</u> e ent <u>R</u> eceive <u>n</u> notate Pay		↓ Distribution	n Apply	<u>P</u> ayment!
<u>B</u> ill Pat	ron <u>H</u> istory											<u>A</u> ctions f	or Selected <sup>-</sup>	Transactions
#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Туре		Title			Payment	Pending 🖽
1	✓ 8.90	1413		Copies	2014-0	. 8.90	0.00	groce	ry				8.90	
2	✓ 1.00	1414		Fee for DVD case	2014-0	. 1.00	0.00	groce	ny				1.00	
List Act	ions • Chec <u>k</u> All	<u>U</u> ncheck All	Check All Refunds Print Bills										Receipt	<u>O</u> ptions •
Voided t	this session: 0.00								Payment	Change		Owed	Billed	Paid
Cha	nge Due U	oon Pavm	ent: <del>.10</del>					Pending:	9.90	.10	Total:	9.90	9.90	0.00
	vert Change to Patron (	-									Checked:	9.90	9.90	0.00

#### Disable Patron Credit

- Library Setting (Admin → Local Administration → Library Settings Editor): Disable Patron Credit
- If this setting's value is True, then the patron credit option is hidden on the patron billing page

Current	Bills														
Tota	al (	Owed:	9.90			Refunds Availa	ble: 0.0	00	De faire ar		Pay Bill Payment <u>T</u> ype			٦	
Tota	al (	Checked	Credit A no longe	<b>vailable</b> r exposed					Patron Credit is not a payment option		Payment <u>R</u> eceiv		✓	Apply	<u>P</u> ayment!
<u>B</u> ill Pa	tron	<u>H</u> istory							•				<u>A</u> ctions fo	Selected 1	ransactions
#		Balance Owed	Bill #	Last Billing N	ote	Last Billing Type	Start	Total Billed	Total Paid	Туре	Title			Payment	Pending 🛱
1	~	8.90	1413			Copies	2014-0	8.90	0.00	grocen	у			0.00	
2	•	1.00	1414			Fee for DVD case	2014-0	1.00	0.00	grocer	y			0.00	
<u>L</u> ist Ac	tions		Uncheck All	Check All Refunds	Print Bills									Receipt	<u>O</u> ptions ▼
Voided	this s	ession: 0.00				<b>Convert Cha</b>	ange t	0		Р	ayment Change		Owed	Billed	Paid
Cha	hange Due Upon Payment: 0.00				Patron Credit checkbox				Pending:	0.00	Total:	9.90	9.90	0.00	
					no longer exposed						Checked:	9.90	9.90	0.00	

- Cash
- Check
- Credit Card
- Patron Credit
- Work



• Some libraries allow patrons to work off their fines.

- Cash
- Check
- Credit Card
- Patron Credit
- Work
- Forgive

# Payment Type Forgive

#### Forgive versus Void

- Voiding fines will clear all history of the bill (if staff voided the entire billing lineitem)
- Void Fines is usually selected when the charge never should have been placed on the account
- Forgiving fines retains the history of the bill.
- Forgive Fine is reserved for charges that are legitimately on the patron's account, but the library decided to waive a portion or the entire charge.
- Conditional Negative Balances
   <u>https://bugs.launchpad.net/evergreen/+bug/1198465</u>
  - Recent Open ILS Mailing List Discussion
     <u>http://markmail.org/thread/yji6kuzv2ks3pmej</u>

- Cash
- Check
- Credit Card
- Patron Credit
- Work
- Forgive
- Goods

#### Payment Type Goods



- Some libraries hold annual canned food drives.
- For example, donate 2 cans of food and get a \$1 off fines.
- The **Goods** Payment Type accommodates such events.

# (Back in) Pay Bill

Wincher	ster, John				Refrest	h <u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> il	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
winche:	ster, John						0	0/0	\$ 9.90				
(Has Bills)													
Current B	ills												
Tota	Owed:	9.90		Refunds Available	: 0.00	)		Pay Bi					
							_	Payment <u>T</u> ype Cash ∨					
Ιοτα	Checked	9.90		Credit Available:	0.00	Enter the	e	Paymo	ent <u>R</u> eceive	ed: 0.00			
						amount received		Ar	inotate Payı	ment See	e <u>D</u> istributi	ion Apply	<u>P</u> ayment!
<u>B</u> ill Patro	on <u>H</u> istory										<u>A</u> ctions	for Selected	Transactions
#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start T	otal Billed	Total Paid	Туре	: Tit	tle		Payment	Pending 🖽
	✓ 8.90	1413		Copies	201 8.	90	0.00	groce	ery			0.00	
2	✓ 1.00	1414		Fee for DVD case	201 1.	00	0.00	groce	₽ry			0.00	
List Actio	ons • Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	Options *
Voided th	is session: 0.00							Payment	Change		Owed	Billed	Paid
Chan	nae Due U	pon Pavn	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
	ert Change to Patron	• •								Checked:	9.90	9.90	0.00

# Pay Bill

Winchester, John	Refresh Check Out Ite	ems Out	<u>H</u> olds	<u>B</u> ills	<u>E</u> dit <u>I</u>	<u>M</u> essages	<u>O</u> ther •		
Thickester, John	0		0/0	\$ 9.90					
(Has Bills)	🔻 🔻								
Current Bills									
Total Owed: 9.90	Refunds Available: 0.00		Pay Bill						
Total Checked: 9.90	Credit Available: 0.00		Payment ]	Lype Cash	¥				
Iotal Checked. 5.50	Credit Available. 0.00	Payment <u>R</u> eceived: 0.00							
	• If staff need to add a payment note, check Annotate Payment.	,	Annot	ate Payment See	<u>D</u> istributio	n Apply <u>I</u>	Payment!		
Bill Patron History	tron History • Checkbox is "sticky" meaning it						ransactions		
# Balance Owed Bill # Last Billing	will remain checked until staff uncheck it.	al Paid	Туре	Title		Payment	Pending 🖽		
1 🗸 8.90 1413			grocery			0.00			
2 ✓ 1.00 1414	Fee for DVD case 201 1.00 0.00	0	grocery			0.00			
List Actions • Check All Uncheck All Check All Refu	nds Print Bills					Receipt	Options +		
Voided this session: 0.00		Р	Payment Ch	ange	Owed	Billed	Paid		
Change Due Upon Payment: 0.0	) <b>0</b>	Pending: (	0.00 0.0	00 Total:	9.90	9.90	0.00		
<u>C</u> onvert Change to Patron Credit				Checked:	9.90	9.90	0.00		

#### Annotate Payment

- With **Annotate Payment** checked, Evergreen will open an annotate payment window (after staff click **Apply Payment!**)
- The note is viewable in **Full Details** and in **History** → **Payments**

Current Bills										
Total Owed: 12.64	Refunds Available: 0.00	-	Pay Bill Payment <u>Type</u> Cash							
Total Checked: 12.64	Credit Available: 0.00	Paym	ent <u>R</u> eceive							
	[JavaScript Application]	× 🗹 A <u>i</u>	<u>n</u> otate Payr	ment See	<u>D</u> istributior	Apply [	2ayment!			
	Please annotate this payment:									
Bill Patron History	ELR took payment @APEX				<u>A</u> ctions fo	or Selected T	ransactions			
# Balance Owed Bill # L		al Paid	Туре	Title		Payment	Pending 🛱			
<b>1 ✓</b> 4.64 1422	OK Cancel		grocery	/		4.64				
<b>2</b> ✓ 8.00 1421		0	grocery	/		.36				
List Actions • Check All Uncheck All	Check All Refunds Print Bills					Receipt	Options •			
Voided this session: 0.00		Payment	Change		Owed	Billed	Paid			
Change Due Upon Paym	ent: 0.00 Pending:	5.00	0.00	Total:	12.64	23.00	10.36			
<u>Convert Change to Patron Credit</u>				Checked:	12.64	23.00	10.36			

# Pay Bill

Winchester, John		Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	<u>B</u> ills	Ē	dit	<u>M</u> essages	<u>O</u> ther •
Whicheseer, John				0	0/0	\$ 9.90				
(Has Bills)										
Current Bills										
Total Owed: 9.90	Refunds Available: 0.00				Pay Bill					
Total Checked: 9.90	Credit Available:	0.00				nt <u>T</u> ype	Cash	×		
Iotal Checked. 5.50	create Available.	0.00			Payme	nt <u>R</u> eceived	0.00			
		iew the ayment.	distribu	tion of	the		See	<u>D</u> istributio	Apply	<u>P</u> ayment!
Bill Patron History	• U	pdates (	the <b>Pay</b>		-			<u>A</u> ctions	for Selected T	ransactions
# Balance Owed Bill # Last Billing Note	Last Billin	ayment	nd the <b>I</b>	renaing		Title	2		Payment	Pending 🖽
<b>1 ✓</b> 8.90 1413	Copies								0.00	
2   1.00 1414	Fee for DVD case	201 1.00		0.00	groce	ry 			0.00	
List Actions • Check All Uncheck All Check All Refunds	Print Bills								Receipt	Options •
Voided this session: 0.00					Payment	Change		Owed	Billed	Paid
Change Due Upon Payment: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
Convert Change to Patron Credit							Checked:	9.90	9.90	0.00

# Pay Bill

Winchester, John		Refresh <u>C</u> heck (	out Items Out	Holds	<u>B</u> ills	<u>E</u> dit <u>M</u> ess	ages <u>O</u> ther •
winchester, John			0	0/0	\$ 9.90		
(Has Bills)	l 🖉 assa	······ ▼					
Current Bills		*					
Total Owed: 9	.90 Refunds Availab	e: 0.00		Pay Bill			
		0.00		Payment <u>T</u>	<b>[ype</b> Cash	~	
Total Checked: 9	.90 Credit Available:	0.00		Payment <u>R</u>	Received: 0.00		
			Clic	k <b>Apply l</b>	Payment!		Apply <u>P</u> ayment!
Bill Patron History						Actions for Se	ected Transactions
# Balance Owed	Bill # Last Billing Note Last Billing Type	Start Total Billed	Total Paid	Туре	Title	Pa	yment Pending 🛱
1 🗸 8.90	1413 Copies	201 8.90	0.00	grocery		0.0	D
2   1.00	1414 Fee for DVD case	201 1.00	0.00	grocery		0.0	D
List Actions • Chec <u>k</u> All	Uncheck All Check All Refunds Print Bills					F	eceipt <u>O</u> ptions •
Voided this session: 0.00				Payment Cha	ange	Owed Bill	ed Paid
Change Due Upo	on Payment: 0.00		Pending:	0.00 0.0	)0 Total:	9.90 9.9	0.00
<u>C</u> onvert Change to Patron Credi	•				Checked	9.90 9.9	0.00

#### Actions for Selected Transactions

Winchest	er John				Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds	Bill	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
winchest	ei, joini						0	0/0	\$ 9.90				
(Has Bills)													
Current Bill	s					.1							
Total	Owed:	9.90		Refunds Available	: 0.00			Pay Bill					
								Payme	nt <u>T</u> ype	Cash		/	
Total	Checke	d: 9.90		Credit Available:	0.00			Payme	nt <u>R</u> eceive	ed: 0.00			
									notate Payr		Distributi	ion Apply	<u>P</u> ayment!
									notate Payr	nent See	. <u>D</u> istributi	Арру	<u>r</u> ayment.
Bill Patron	<u>H</u> istory					Either o	click Ac	rtions f	for		Actions	for Selected 1	
-		L D'11.4	L DEPENDENT	L DUC T	0. J. T. J.		ed Tran		• •		_		
#	Balance Ow		Last Billing Note	Last Billing Type	Start Tota					le			Pending 🛱
	8.90	1413		Copies	201 8.90		0.00	groce	• • • • • • • • • • • •			0.00	
2 🗸	1.00	1414		Fee for DVD case	201 1.00		0.00	groce	ry			0.00	
List Action	s • Chec	All <u>U</u> ncheck All	Check All Refunds	Print Bills								Receipt	Options *
Voided this	session: 0.00							Payment	Change		Owed	Billed	Paid
Chan	ae Due	Upon Payr	nent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
	t Change to Pa									Checked:	9.90	9.90	0.00

#### Actions for Selected Transactions

Winchester, Joh					Refresh	<u>C</u> heck Out	<u>I</u> tems Out	Holds	<u>B</u> ill	ls	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther •
Winchester, Joh							0	0/0	\$ 9.90				
(Has Bills)				🔻		•							
Current Bills													
Total Ow	ed:	9.90		Refunds Available	: 0.00			Pay Bi	1				
								Payme	ent <u>T</u> ype	Cash		/	
Total Che	ecked:	9.90		Credit Available:	0.00			Payme	ent <u>R</u> eceive	ed: 0.00			
									notate Payr	ment See	<u>D</u> istribut	ion Apply	<u>P</u> ayment!
									inotate r ayı	inene bee	. <u>o</u> istribut		Layment
Bill Patron	<u>H</u> istory					Fither	click A	etions	for		Action	s for Selected 1	Transactions
# Bala	nce Owed	Bill #	Last Billing Note	Last Pilling Tune	Start Tota		ed Tran		_	tle	_		Pending 🖽
# Bala	ice Oweu	1413	Last bining Note	Last Billing Type Copies	201 8.90		0.00	aroce				0.00	renuing L <del>.</del>
2 ✓ 1.00		1413		Fee for DVD case	201 1.00		0.00	groce				0.00	
								2					
						Or Rig	ht-Click	c on a s	selecte	d linei	tem		
						U							
List Actions •	Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills								Receipt	Options •
Voided this sessio	n: 0.00							Payment	Change		Owed	Billed	Paid
Change I	)ue Ur	on Paym	ent: 0.00				Pending:	0.00	0.00	Total:	9.90	9.90	0.00
-	•	•								Checked:	9.90	9.90	0.00
Convert Chang	e to Patron C	redit											

#### Actions for Selected Transactions

- Show in Catalog = if applicable (won't apply to most grocery types), opens the bibliographic record in a new tab.
- Show Item Details = if applicable (won't apply to most grocery types), opens the Item Status screen (Alternate View) in a new tab.
- Void All Billings = voids the entire selected billing lineitem(s) and removes from the patron account.
- Refund = reimbursement for fines paid.
- Add Billing = add additional bills to an already existing billing lineitem (also used to zero out a negative bill).
- Full Details = view item summary, view and/or edit notes associated with the bill, view billing and payment information. This is also where staff can void specific billing lineitems.

# **Receipt Options**

Current Bills								
Total Owed:	9.90		Refunds Availa	able: 0.00			Pay Bill	
Total Checke	d: 9.90		Credit Availab	le: 0.00			Payment Type Cas Payment Received: Agnotate Payment	h v See Distribution Apply Dayment
Bill Patron History								Actions for Selected Transactions
# Balance Own 1 ✓ 8.90 2 ✓ 1.00	d Bill # 1413 1414	Last Billing Note	Last Billing Type Copies Fee for DVD case	Start Total Billed 2014-0 8.90 2014-0 1.00	Total Paid 0.00 0.00	Type grocery grocery	Trile	Payment Pending 🕫 0.00 0.00
List Actions • Check Voided this session: 0.00 Change Due Convert Change to Pat	Upon Paym	Check All Refunds Print Bills			Pe	Pa ending: ().(	yment Change 00 0.00 Total: Checks	Receipt Qptions •           Ov         Receipt Upon Payment           9.5         Printer Prompt           ed:         9.5         Number of Copies:         1 💭

# History

Current Bills														
Total Owed: 9.90 Refunds Available: 0.00									Pay Bill					
Total Checked: 9.9	0	Credit Availa	able: 0.0	0			Paym	ent <u>Type</u> ent <u>R</u> eceived notate Paym		✓ <u>D</u> istribution	Apply	Payment!		
Bill Patron History	Click <b>History</b> to vi									<u>A</u> ctions fo	or Selected	Transactions		
	the patron's billing transactions and his	T	2014-0		Total Paid 0.00 0.00	Type grocer grocer	y	Title			Payment 0.00 0.00	Pending 🛱		
List Actions • Chec <u>k</u> All Un	check All Check All Refunds Print Bills										Receipt	t <u>O</u> ptions •		
Voided this session: 0.00						I	Payment	Change		Owed	Billed	Paid		
Change Due Upon	Payment: 0.00					Pending:	0.00	0.00	Total:	9.90	9.90	0.00		
<u>C</u> onvert Change to Patron Credit									Checked:	9.90	9.90	0.00		

#### Bill History

Transactions Payments

Selec	cted Billed: 0.00 Sele	ected Paid: 0.00		Filter		Start Date 03/ 16/ 20	013 🛓 🗸 🛛 End Date	e 03/16/2014 🔹 🗸	<u>R</u> etrieve Transactions
#	Balance Owed	Bill #	Last Billing Note	Last B date r	Total Billed	Total Paid	Туре	Title	Ę
1	0.00	1409			2014-03 0.00	0.00	circulation	The omnivore's dilem	ma : a natural histor
2	1.00	1414		Fee for DVD case	2014-03 1.00	0.00	grocery		
3	0.00	1407		Copies	2014-03 550.00	550.00	grocery		
4	8.90	1413		Copies	2014-03 8.90	0.00	grocery		
5	0.00	1406		Copies	2014-03 15.00	15.00	grocery		
6	0.00	1405		Copies	2014-03 1.20	1.20	grocery		
<u>L</u> ist	Actions •						<u>P</u> rint Ad	ld Billing Show <u>I</u> tem D	etails Full <u>D</u> etails

#### **Cash Reports**

• **Cash Reports** (Admin  $\rightarrow$  Local Administration  $\rightarrow$  Cash Reports)

Cash Reports +										
Go <u>B</u> ack	Re <u>l</u> oad Go Forwar <u>d</u>							Debug Print Page		
Select Start and End Dates Start Date: 2014-01-01 End Date: 2014-03-16 Welcome ac (YYYY-MM-DD) View reports for : Apex Branch Submit Track cash, credit card, or check payments made at workstations										
registered at selected branch Desk Payments										
WO	<u>rkstation</u>	<u>cash pa</u>		<u>check pa</u>	<u>iyment</u>			<u>credit card payment</u>		
A	PEX-EricaR		842.98			15.10		0.00		
		84	2.98	15	.10			0.00		
042.30       15.10       0.00         Track patron credit, forgive, work, good payment         good payment       Note: home library of staff who acceed the payment also has to match the workstation library where the report							ry of staff who accepted has to match the			
<u>usr</u>	<u>credit pa</u>	<u>yment</u>	<u>forgive</u> pa	<u>yment</u>	V	work payme	<u>nt</u>	goods payment		
<u>admin</u>		0.36		1.60			0.00	0.00		
	0.36			1.60 0.				0.00		