

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

Presented by

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and

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2014 Evergreen Conference (March 20, 2014)

# 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

x

Other ▾

\$ 5.20

Gender male

## Other Phone:

## Retrieve Patron

9: 20: 08 AM

五

Done

1 Patron: Winchester, John +

Winchester, John

Color Coded Box  
Around Patron  
Name

(Has Bills)

### Patron Info

Winchester, John

Date of Birth: <Hidden>

Library Card: [32682333874354](#)

Holds Alias:

OPAC Login: 32682333874354

Email: [winchester@example.com](mailto:winchester@example.com)

Gender male

### Addresses

1 JoePye Weed Lane

Lawrence Kansas 66045

☒ Mailing
 ☐ Billing
 [\(Copy/Print\)](#)

### Phone Numbers

Day Phone: [479-555-5555](#)

Evening Phone:

Other Phone:

Account Info Identification **Group: 6.50** Stat Cats

#	Family Name	First Name	Balance Owed	
1	Fields	Dorian	6.50	

[List Actions ▾](#)
[Group Member Details](#)
[Retrieve Patron](#)

### Check Out

Barcode: ▾  [Submit](#)

☐ Specific Due Date
 03/ 13/ 2014 ▾ ▾
 9: 20: 08 AM ▾ ▾

#	Barcode	Due Date	ISBN	Price	Title	

[Print Receipt](#)
[Export](#)
[Copy to Clipboard](#)
[Save Columns](#)
☐ Strict Barcode
 ☐ Auto-Print
 [Done](#)

x

## Clickable Parenthetical Indicators

Patron Info

Winchester, John

Date of Birth: <Hidden>

Library Card: 3268233874354

Holds Alias:

OPAC Login: 3268233874354

Email: [winchester@example.com](mailto:winchester@example.com)

Gender male

## Addresses

1 JoePye Weed Lane

Lawrence Kansas 66045

☒ Mailing ☐ Billing [\(Copy/Print\)](#)

### Phone Numbers

Day Phone: 479-555-5555

Evening Phone:

Other Phone:

Account Info	Identification	Group: 6.50	Stat Cats
--------------	----------------	-------------	-----------

#	Family Name	First Name	Balance Owed	
1	Fields	Dorian	6.50	

List Actions ▾

Group Member Details

Retrieve Patron

## Check Out

Barcode:  Submit

☐ Specific Due Date 03/ 13/ 2014 9: 20: 08 AM

Print Receipt    Export    Copy to Clipboard    Save Columns    ☐ Strict Barcode    ☐ Auto-Print    Done

1 Patron: Winchester, John +

**Winchester, John**

[Refresh](#)
[Check Out](#)
[Items Out](#)
[Holds](#)
[Bills](#)
[Edit](#)
[Messages](#)
[Other](#)

0 0/0 \$ 5.20

Total Patron Owes

(Has Bills)

**Patron Info**  
 Winchester, John  
[Date of Birth:](#) <Hidden>  
[Library Card:](#) 32682333874354  
 Holds Alias:  
 OPAC Login: 32682333874354  
 Email: [winchester@example.com](mailto:winchester@example.com)  
 Gender male

**Addresses**  
 1 JoePye Weed Lane  
 Lawrence Kansas 66045  
☒ Mailing ☐ Billing [\(Copy/Print\)](#)

**Phone Numbers**  
 Day Phone: [479-555-5555](tel:479-555-5555)  
 Evening Phone:  
 Other Phone:

Account Info Identification <b>Group: 6.50</b> Stat Cats				
#	Family Name	First Name	Balance Owed	
1	Fields	Dorian	6.50	
<a href="#">List Actions</a> <a href="#">Group Member Details</a> <a href="#">Retrieve Patron</a>				

**Check Out**

Barcode:  [Submit](#) ☐ Specific Due Date 03/ 13/ 2014 9: 20: 08 AM

#	Barcode	Due Date	ISBN	Price	Title

[Print Receipt](#)
[Export](#)
[Copy to Clipboard](#)
[Save Columns](#)
☐ Strict Barcode
 ☐ Auto-Print
 [Done](#)

1 Patron: Winchester, John +

**Winchester, John**

[Refresh](#)
[Check Out](#)
[Items Out](#)
[Holds](#)
[Bills](#)
[Edit](#)
[Mes](#)

0 0/0 \$ 5.20

(Has Bills)

**Patron Info**  
 Winchester, John  
[Date of Birth:](#) <Hidden>  
[Library Card:](#) 32682333874354  
 Holds Alias:  
 OPAC Login: 32682333874354  
 Email: [winchester@example.com](mailto:winchester@example.com)  
 Gender: male

**Addresses**  
 1 JoePye Weed Lane  
 Lawrence Kansas 66045  
☒ Mailing ☐ Billing [\(Copy/Print\)](#)

**Phone Numbers**  
 Day Phone: [479-555-5555](tel:479-555-5555)  
 Evening Phone:  
 Other Phone:

Account Info Identification **Group: 6.50** **6.50**

#	Family Name	First Name	Balance Owed	
1	Fields	Dorian	6.50	

[List Actions ▾](#)
[Group Member Details](#)
[Retrieve Patron](#)

Total Owed by Other Group Members

**Check Out**

Barcode: ▾  [Submit](#)
☐ Specific Due Date
 03/ 13/ 2014 ▾ ▾ 9: 20: 08 AM ▾ ▾

#	Barcode	Due Date	ISBN	Price	Title	



1 Patron: Winchester, John    2 Bib Record: 6207    +

**Winchester, John**

[Refresh](#)    [Check Out](#)    [Items Out](#)    [Holds](#)    [Bills](#)    [Edit](#)

1    0/0    \$ 35.00

If patron exceeds max fines, total owed appears in red.

(Maximum Bills) (Has Bills) (Has Lost)

**Patron Info**

Winchester, John

[Date of Birth:](#) <Hidden>

[Library Card:](#) [32682333874354](#)

Holds Alias:

[OPAC Login:](#) 32682333874354

[Email:](#) [winchester@example.com](mailto:winchester@example.com)

[Gender:](#) male

**Addresses**

1 JoePye Weed Lane

Lawrence Kansas 66045

☒ Mailing    ☐ Billing    [\(Copy/Print\)](#)

**Phone Numbers**

[Day Phone:](#) [479-555-5555](tel:479-555-5555)

[Evening Phone:](#)

[Other Phone:](#)

Account Info    Identification    **Group: 6.50**    Stat

#	Family Name	First Name	Balance Owed
1	Fields	Dorian	6.50

[List Actions ▾](#)    [Group Member Details](#)    [Retrieve Patron](#)



# Alert

CONS : Patron exceeds fine threshold

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

**Winchester, John**

[Refresh](#)
[Check Out](#)
[Items Out](#)
[Holds](#)
[Bills](#)
[Edit](#)
[Messages](#)
[Other ▾](#)

1 0/0 \$ 35.00

[\(Maximum Bills\)](#)
[\(Has Bills\)](#)
[\(Has Lost\)](#)

**Patron Info**

Winchester, John

[Date of Birth:](#) <Hidden>

[Library Card:](#) [32682333874354](#)

[Holds Alias:](#)

[OPAC Login:](#) 32682333874354

[Email:](#) [winchester@example.com](mailto:winchester@example.com)

[Gender:](#) male

**Addresses**

1 JoePye Weed Lane

Lawrence Kansas 66045

☒ Mailing
 ☐ Billing
 [\(Copy/Print\)](#)

**Phone Numbers**

[Day Phone:](#) [479-555-5555](#)

[Evening Phone:](#)

[Other Phone:](#)

[Account Info](#)
[Identification](#)
[Group: 6.50](#)
[Stat Cats](#)

#	Family Name	First Name	Balance Owed
1	Fields	Dorian	6.50

[List Actions ▾](#)
[Group Member Details](#)
[Retrieve Patron](#)



# Alert

CONS : Patron exceeds fine threshold

Press a navigation button above (for example)



If patron exceeds fine threshold, staff member will see the Alert page when entering a patron's account. (If standing penalty's "staff\_alert" is set to True)

alert.

# Group Penalty Threshold

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

The screenshot shows a web application interface for configuring group penalty thresholds. At the top, there is a navigation bar with links like File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. Below this is a toolbar with icons for Check Out, Check In, Search Catalog, Item Status, Patron Search, and Patron Registration. The main content area is titled "Penalty Threshold" and includes a "Context Org Unit" dropdown set to "APEX". There are buttons for "Go Back", "Reload", "Go Forward", "Debug", and "Print Page". A table lists existing penalty thresholds with columns for Group, Org Unit, Penalty, and Threshold. A modal dialog is open, allowing the user to add a new threshold for the "Users" group in the "APEX" org unit, with the penalty type "PATRON\_EXCEEDS\_FINES" and a threshold of "15".

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

Check Out Check In Search Catalog Item Status Patron Search Patron Registration Toggle Hotkeys

1 Server Settings +

Go Back Reload Go Forward Debug Print Page

### Penalty Threshold

Context Org Unit APEX

Back Next Filter

✓	#	Group	Org Unit	Penalty	Threshold
<input type="checkbox"/>	1	Users	CONS	PATRON_EXCEEDS_OVERDUE	10.00
<input type="checkbox"/>	2	Users	CONS	PATRON_EXCEEDS_CHECKOUT	15.00
<input type="checkbox"/>	3	Users	CONS		10.00
<input type="checkbox"/>	4	Patron	APEX		100.00
<input type="checkbox"/>	5	Resident	APEX		10.00

Group: Users

Org Unit: APEX

Penalty: PATRON\_EXCEEDS\_FINES

Threshold: 15

Cancel Save

New Penalty Threshold Delete Selected

# Standing Penalties

- Admin → Local Administration → 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
<input type="checkbox"/>	1	20	ALERT_NOTE	Alerting Note, no blocks			True
<input type="checkbox"/>	2	29	INVALID_PATRON_ADDRESS	Patron has an invalid address			False
<input type="checkbox"/>	3	32	INVALID_PATRON_DAY_PHONE	Patron had an invalid daytime phone number		0	True
<input type="checkbox"/>	4	31	INVALID_PATRON_EMAIL_ADDRESS	Patron had an invalid email address		0	True
<input type="checkbox"/>	5	33	INVALID_PATRON_EVENING_PHONE	Patron had an invalid evening phone number		0	True
<input type="checkbox"/>	6	34	INVALID_PATRON_OTHER_PHONE	Patron had an invalid other phone number		0	True
<input type="checkbox"/>	7	3	PATRON_EXCEEDS_CHECKOUT_COUNT	Patron exceeds max checked out item threshold	CIRC FULFILL		False
<input type="checkbox"/>	8	4	PATRON_EXCEEDS_COLLECTIONS_WARNING_THRESHOLD	Patron exceeds pre-collections warning fine threshold	CIRC FULFILL HOLD CAPTURE RENEW		False
<input type="checkbox"/>	9	1	PATRON_EXCEEDS_FINES	Patron exceeds fine threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
<input type="checkbox"/>	10	35	PATRON_EXCEEDS_LONGOVERDUE_COUNT_THRESHOLD	Patron Exceeds Max Long-Overdue Threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
<input type="checkbox"/>	11	5	PATRON_EXCEEDS_LOST_COUNT	Patron exceeds max lost item threshold	CIRC FULFILL HOLD CAPTURE RENEW		True
<input type="checkbox"/>	12	2	PATRON_EXCEEDS_OVERDUE_COUNT	Patron exceeds max overdue item threshold	CIRC FULFILL HOLD CAPTURE RENEW		False
<input type="checkbox"/>	13	30	PATRON_IN_COLLECTIONS	Patron has been referred to a collections agency			False

# Within Patron Billing Page

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	0.00	0.00	Total: 9.90	9.90	0.00
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 Bills

Total Owed: 40.35

Total Checked: 40.35

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash

Payment Received:

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Red Items are still Checked Out

Orange Items are Long Overdue

Dark Red Items are Lost

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	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, John

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other ▾

0

0/0

\$ 9.90

(Has Bills)

Current Bills

**Total Owed: 9.90** ← **Bills Available: 0.00**

**Total Checked: 9.90** **Available: 0.00**

Summary of  
total owed to  
the library

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

If the patron is due a refund:  
 $\text{Refund Available} - \text{Balance Owed} = \text{Total Owed}$

Fields, Dorian

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

10/0\$ 16.50

(Maximum Bills) (Has Bills)

Current Bills

Total Owed: -18.50

Total Checked: 16.50

Refunds Available: 35.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment
 

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓	1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3		-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	0.00	0.00		-18.50	21.50	40.00
Checked:				16.50	21.50	5.00



Fields, Dorian

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

1

0/0

\$ 16.50

(Maximum Bills) (Has Bills)

### Current Bills

**Total Owed: -18.50**

**Refunds Available: 35.00**

**Total Checked: 16.50**

By default, all  
but the refund  
line items are  
checked.

#### Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓ 1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3	-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Owed

Billed

Paid

Pending:

0.00

0.00

Total:

-18.50

21.50

40.00

Checked:

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

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

10/0\$ 16.50

(Maximum Bills) (Has Bills)

Current Bills

Total Owed: -18.50

Total Checked: 16.50

Refunds Available: 35.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment
 

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓	1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3		-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	0.00	0.00		-18.50	21.50	40.00
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**  
**Total Checked: 45.19**

**Refunds Available: 0.00**  
**Credit Available: 0.00**

Pay Bill

Payment Type Cash

Payment Received: 0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Red Items are still Checked Out

Dark Red Items are Lost

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	S...	Total Billed	Total Paid	Type	Title	Payment Pending
✓	2.00	1386	SYSTEM GENERATED	Lost Materials Pr...	2...	10.00	8.00	circulation	Shattered : a novel	0.00
✓	.70	1389	System Generated Ov...	Overdue materials	2...	.70	0.00	circulation	In the tall, 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	circulation	Dragonseye	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment

Change

Total:

Pending: 0.00

0.00

45.19

Owed

Billed

Paid

53.19

8.00

45.19

Checked:

53.19

8.00

Winchester, John

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

0

0/0

\$ 9.90

(Has Bills)

### Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

#### Pay Bill

Payment Type

Cash

Payment Received:

0.00

☐ Annotate Payment

Click on the **Total Billed** or **Total Paid** column header to sort numerically

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

0

0/0

\$ 9.90

(Has Bills)

Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Click on the **Total Billed** or **Total Paid** column header to sort numerically

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

If you do not see these columns on your staff client, make sure you selected them in the column picker.

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

0

0/0

\$ 9.90

(Has Bills)

Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Click on the **Total Billed** or **Total Paid** column header to sort numerically

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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 Actions** → **Save Column Configuration**

If you do not see these columns on your staff client, make sure you selected them in the column picker.

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

Fields, Dorian

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

1

0/0

\$ 16.50

(Maximum Bills) (Has Bills)

### Current Bills

Total Owed: -18.50

Total Checked: 16.50

Refunds Available: 35.00

Credit Available: 0.00

Summary of  
refund owed  
to the patron

Cash

ed:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓	1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3		-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

-18.50

Billed

21.50

Paid

40.00

Checked:

16.50

21.50

5.00

Fields, Dorian

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

1

0/0

\$ 16.50

(Maximum Bills) (Has Bills)

### Current Bills

Total Owed: -18.50

Total Checked: 16.50

Refunds Available: 35.00

Credit Available: 0.00

Summary of  
refund owed  
to the patron

Cash

ed:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓	1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3		-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

Refund lineitem's **Payment Pending** will be highlighted in pink.

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

-18.50

Billed

21.50

Paid

40.00

Checked:

16.50

21.50

5.00



Fields, Dorian

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

10/0\$ 16.50

(Maximum Bills) (Has Bills)

Current Bills

Total Owed: -18.50

Total Checked: 16.50

Refunds Available: 35.00

Credit Available: 0.00

Cash

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Dark Red Items are Lost

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 15.00	1417		Copies	201...	15.00	0.00	grocery		0.00
2	✓ 1.50	1412		Copies	201...	6.50	5.00	grocery		0.00
3	-35.00	1419			201...	0.00	35.00	circulation	Arthur's tree house	0.00

Balance Owed will be a negative value.

Refund lineitem's Payment Pending will be highlighted in pink.

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	0.00	0.00	Total: -18.50	21.50	40.00
Checked:	16.50			21.50	5.00

Worthington, William

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other ▾

0

0/0

\$ 0.00

Current Bills

Total Owed: 0.00

Total Checked: 0.00

Refunds Available: 0.00

Credit Available: .36

Pay Bill

Payment Type

Cash ▾

0.00

See Distribution

Apply Payment!

Summary of  
patron credit  
available

Bill Patron

History

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	S...	Total Billed	Total Paid	Type	Title	Payment Pending	⚙

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☒ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

0.00

Billed

0.00

Paid

0.00

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

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total

Total

Click **Bill Patron** button

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment TypeCash ▾

Payment Received:0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Checked:

Pending:0.000.009.909.900.000.009.909.900.00



## Bill Patron Wizard



**Winchester, John : 32682333874354**

### Create Bill

Location	<input type="text" value="Apex Branch"/>
Transaction Type	<input type="text" value="Grocery"/>
Billing Type	<input type="text" value="Copies"/>
Amount	<input type="text" value="0.10"/>
Note	<input type="text"/>

Cancel

Submit this Bill

Bill Patron Wizard

Winchester, John : 32682333874354

Create Bill

Location

Apex Branch

Transaction Type

Grocery

Billing Type

Copies

Amount

0.10

Note

Two Transaction Types will appear:

- **Grocery** - bills that staff manually apply to the patron's account
- **Circulation** - system generated charges added to a patron's account
  - Since the **Circulation Transaction Type** is system generated, this option is grayed out in the dropdown menu.
- Evergreen generates these charges based on various policies, library settings, and other configurations set up by Administration.




## Bill Patron Wizard



Winchester, John : 32682333874354

### Create Bill

Location	Apex Branch
Transaction Type	Grocery ▼
Billing Type	Copies ▼
Amount	0.10
Note	

- 
- Administrators define the **Billing Type** options that appear in the dropdown.
  - Billing Type “Misc” appears by default in the system.

Cancel

Submit this Bill

# Billing Types

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

**Billing Types**

New Billing TypeDelete Selected

Context Org UnitAPEX

[Back](#) [Next](#) [Filter](#)

✓	#	Name	Org Unit	Default Price
<input type="checkbox"/>	1	Overdue Materials	CONS	
<input type="checkbox"/>	2	Long Overdue Collection Fee	CONS	
<input type="checkbox"/>	3	Lost Materials		
<input type="checkbox"/>	4	Lost Materials Processing Fee		
<input type="checkbox"/>	5	System: Deposit		
<input type="checkbox"/>	6	System: Rental		
<input type="checkbox"/>	7	Damaged Item		
<input type="checkbox"/>	8	Damaged Item Processing Fee		
<input type="checkbox"/>	9	Notification Fee		
<input type="checkbox"/>	10	Long-Overdue Materials		
<input type="checkbox"/>	11	Long-Overdue Materials Processing Fee	CONS	
<input type="checkbox"/>	12	Misc	CONS	
<input type="checkbox"/>	13	Fax	APEX	1.00
<input type="checkbox"/>	14	ILL	APEX	2.00
<input type="checkbox"/>	15	Library mug	CONS	4.50
<input type="checkbox"/>	16	Copies	CONS	0.10
<input type="checkbox"/>	17	DVD in Drop Box	CONS	2.00

NameTote Bag

Org UnitAPEX

Default Price5.00

CancelSave





## Bill Patron Wizard



Winchester, John : 32682333874354

### Create Bill

Location	Apex Branch
Transaction Type	Grocery
Billing Type	Copies
Amount	0.10
Note	



- If the Billing Type selected has a Default Price, the Amount will fill in automatically.
- If no Default Price is defined, then the Amount field will remain blank.
- Staff can manually enter any amount.
- Staff can change a Default Price.
- Select the Billing Type first, then enter the Amount.

Cancel

Submit this Bill



## Bill Patron Wizard

Winchester, John : 32682333874354

### Create Bill

Location	Apex Branch
Transaction Type	Grocery ▼
Billing Type	Copies ▼
Amount	0.10
Note	



- Staff can write as much detail about this billing as necessary.
- Free text and no character limit (that I've reached).
- Very helpful tool for frontline staff when a patron doesn't understand how/why he owes the library a \$9.00 Misc Grocery bill.

Cancel

Submit this Bill



## Bill Patron Wizard



Winchester, John : 32682333874354

### Create Bill

Location	<input type="text" value="Apex Branch"/>
Transaction Type	<input type="text" value="Grocery"/>
Billing Type	<input type="text" value="Copies"/>
Amount	<input type="text" value="0.10"/>
Note	<input type="text"/>

**Click Submit this Bill**



Cancel

Submit this Bill

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

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Either click **Actions for Selected Transactions**

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total	Title	Payment Pending	
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Pending:

0.00

0.00

9.90

Owed

Billed

Paid

9.90

9.90

0.00

Checked:

9.90

9.90

0.00

# Add Billing

Winchester, John

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment TypeCash ▾

Payment Received: 0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Either click **Actions for Selected Transactions**

→

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total	Title	Payment Pending	
1	✓ 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

Or Right-Click on a selected lineitem

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Owed

Billed

Paid

Pending:

0.00

0.00

9.90

9.90

0.00

Checked:

9.90

9.90

0.00

# Add Billing

Winchester, John

(Has Bills)

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other ▾

00/00\$ 9.90

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment TypeCash ▾

Payment Received: 0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Either click **Actions for Selected Transactions**

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total	Title	Payment Pending
1	✓ 8.90	1413		Copies	201...	8.90	grocery	0.00
2	✓ 1.00	1414		Fee for DVD case	201...	1.00	grocery	0.00

Select **Add Billing**

Show in Catalog

Show Item Details

Void All Billings

Refund

Add Billing

Full Details

Or Right-Click on a selected lineitem

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Owed

Billed

Paid

Pending:

0.00

0.00

Total:

9.90

9.90

0.00

Checked:

9.90

9.90

0.00

# 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.

Patrons With Negative Balances

APEX Apex Branch ▼

Select Branch

Retrieve Patron

#	Barred	Date of Birth	First Name	Middle	Balance Owed	Last Billing Activity
1	f	2008-09-29 3:00 AM	Treasure	Bella	-35.00	2013-04-15 7:05 PM
2	f	1964-09-27 3:00 AM	Jo	Schmoe	-25.00	2013-04-15 6:59 PM

List Actions ▼

Actions for Selected Patrons



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

Acquisitions - Booking

Search Catalog Item Status Patron Search Patron Registration

Admin Help Toggle Hotkeys

Refresh Check Out Items Out Holds Bills Edit Messages Other

25 1/5 \$ 6.00

(See Notes) (Has Bills) (Has Overdues)

**Current Bills**

**Total Owed: 6.00** **Refunds Available: 10.00**

**Total Checked: 16.00** **Credit Available: 0.00**

Pay Bill

Payment Type: Cash

Payment Received:

☐ Annotate Payment

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
2	✓ 3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
3	✓ .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	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 Pruney-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 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	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
16	✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
17	✓ .10	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	✓ .10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-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
24	✓ .20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
25	✓ .40	54295082	10/26/2009 1:16 PM	.40	0.00	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	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	✓ .40	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 hornet'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 a freethinking dog	0.00

List Actions Check All Uncheck All Check All Refunds Print Bills

Receipt Options

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment	Change	Owed	Billed	Paid
Pending: 0.00	0.00	Total: 6.00	17.70	11.70
Checked: 16.00			17.70	1.70

1:58 PM 2/18/2014

Refresh   Check Out   Items Out   Holds   **Bills**   Edit   Messages   Other  
25   1/5   \$ 6.00

Current Bills

**Total Owed: 6.00**  
**Total Checked: -10.00**  
**Refunds Available: 10.00**  
**Credit Available: 0.00**

Pay Bill  
Payment Type: Cash  
Payment Received: 0.00  
☐ Annotate Payment     

#	Balance Owed	Bill #	Start	Total Billed	Total Paid		
1	3.00	126632709	01/27/2014 3:40 PM	3.00	0.00		
2	3.00	126632737	01/27/2014 3:40 PM	3.00	0.00		
3	.20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and get
4	.60	47665568	06/25/2009 6:47 PM	.60	0.00	circulation	The boy next door
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	
7	.10	50990014	08/23/2009 5:23 PM	.10	0.00	circulation	
8	.10	50989997	08/23/2009 5:23 PM	.10	0.00	circulation	
9	.10	50990015	08/23/2009 5:23 PM	.10	0.00	circulation	
10	.10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	The Chipmunks sing the Beatles hits
11	.10	50990022	08/23/2009 5:24 PM	.10	0.00	circulation	Belinda and the glass slipper
12	.10	50990031	08/23/2009 5:24 PM	.10	0.00	circulation	OK computer
13	.10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Vinegar Hill
14	.10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home
15	.10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Prodigal summer : a novel
16	.10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Welcome to the world, Baby Girl
17	.10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas
18	.10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying
19	.10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina
20	.10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	Maisy goes camping
21	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	The loop
22	.60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	Made for each other : the biology of the human-animal bond
23	1.00	51822187				circulation	The Chipmunks sing the Beatles hits
24	.20	54295102				circulation	OK computer
25	.40	54295082				circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...
26	.40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	The bean trees : a novel
27	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch
28	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	All the living
29	.40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel
30	.70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Can you keep a secret?
31	.60	75827251	01/08/2011 3:08 PM	.60	0.00	circulation	Kids wanna rock
32	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	The girl who kicked the hornet's nest
33	1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	Egg carton mania
34	1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thriller
							Merle's door : lessons from a freethinking dog

Either click **Actions for Selected Transactions**

Select **Full Details**

- Actions for Selected Transactions
- Show in Catalog
  - Show Item Details
  - Void All Billings
  - Refund
  - Add Billing
  - Full Details

Or Right-Click on a selected lineitem

Voided this session: 0.00

**Change Due Upon Payment: 10.00**

☐ Convert Change to Patron Credit

	Payment	Change	Total	Owed	Billed	Paid
Pending:	-10.00	10.00		6.00	17.70	11.70
Checked:				-10.00	0.00	10.00

# Full Details

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

		Total Billed0.00		TitleEgg carton mania	
		Total Paid10.00		Checked Out07/13/2008 3:40 PM	
		Balance Owed-10.00		Due Date07/27/2008 3:40 PM	
		Renewal?DESK		Checked In07/27/2008 12:00 AM	

Item Summary

#Alert Message

1

Total Circs14

List Actions

Show in Catalog

Alternate View

#	Amount	Billing Type	Note	Void Time	Voided	When
1	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	07/28/2008 12:00 AM
2	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	07/29/2008 12:00 AM
3	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	07/30/2008 12:00 AM
4	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	07/31/2008 12:00 AM
5	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/01/2008 12:00 AM
6	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/02/2008 12:00 AM
7	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/03/2008 12:00 AM
8	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/04/2008 12:00 AM
9	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/05/2008 12:00 AM
10	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/06/2008 12:00 AM
11	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/07/2008 12:00 AM
12	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/08/2008 12:00 AM
13	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/09/2008 12:00 AM
14	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/10/2008 12:00 AM
15	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/11/2008 12:00 AM
16	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/12/2008 12:00 AM
17	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/13/2008 12:00 AM
18	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/14/2008 12:00 AM
19	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/15/2008 12:00 AM
20	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/16/2008 12:00 AM
21	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/17/2008 12:00 AM
22	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/18/2008 12:00 AM
23	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/19/2008 12:00 AM
24	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/20/2008 12:00 AM
25	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/21/2008 12:00 AM
26	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/22/2008 12:00 AM
27	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/23/2008 12:00 AM
28	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/24/2008 12:00 AM
29	.10	Overdue materials	System Generated Overdue Fine	01/09/2009 4:22 PM	Yes	08/25/2008 12:00 AM

List Actions

Edit note

Void selected billings

#	Amount	Note	Payment Type	When	Workstation
1	10.00		forgive_payment	01/09/2009 4:22 PM	

List Actions

Edit note

Close Window



# Wrong Workflow!

Item Status

Patron Search

Patron Registration

Admin

Help

Toggle Hotkeys

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other

251/5\$ 6.00

Current Bills

Total Owed: 6.00

Total Checked: 16.00

Refunds Available: 10.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash

Payment Received:

Apply Payment!

Bill Patron

History

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
2	✓ 3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
3	✓ .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	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 Pruney-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 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	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
16	✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
17	✓ .10	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	✓ .10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-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
24	✓ .20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
25	✓ .40	54295082	10/26/2009 1:16 PM	.40	0.00	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	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	✓ .40	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 hornet'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 1			circulation	The last patriot : a thriller	0.00
34	✓ 1.20	125208743				circulation	Merle's door : lessons from a freethinking dog	0.00

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Voided this session: 0.00

Change Due Upon Payment: 0.00

Convert Change to Patron Credit

3. Click Apply Payment

1. Click Uncheck All

2. Click Check All Refunds

Payment

Change

Owed

Billed

Paid

Pending: 0.000.00

Total: 6.0017.70

Checked: 16.0017.70

1.70

Receipt Options

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

Item Status

Patron Search

Patron Registration

Admin Help

Toggle Hotkeys

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

251/5\$ 6.00

Current Bills

Total Owed: 6.00

Total Checked: -10.00

Refunds Available: 10.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash

Payment Received: 0.00

Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
2	3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
3	.20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	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	And night, Princess Pruney-Toes	0.00
8	.10	50989997	08/23/2009 5:23 PM	.10	0.00	circulation	Many colored days	0.00
9	.10	50990015	08/23/2009 5:23 PM	.10	0.00	circulation	Chipmunks sing	0.00
10	.10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	And the glass	0.00
11	.10	50990022	08/23/2009 5:23 PM	.10	0.00	circulation	garden	0.00
12	.10	50990031	08/23/2009 5:23 PM	.10	0.00	circulation	then home	0.00
13	.10	50990039	08/23/2009 5:23 PM	.10	0.00	circulation	llegal summer : a n	0.00
14	.10	50990041	08/23/2009 5:23 PM	.10	0.00	circulation	come to the world, Baby Girl	0.00
15	.10	50990027	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
16	.10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying	0.00
17	.10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina	0.00
18	.10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Maisy goes camping	0.00
19	.10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	The loop	0.00
20	.10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-animal bond	0.00
21	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	The Chipmunks sing the Beatles hits	0.00
22	.60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	OK computer	0.00
23	1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
24	.20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	The bean trees : a novel	0.00
25	.40	54295082	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch	0.00
26	.40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	All the living	0.00
27	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel	0.00
28	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?	0.00
29	.40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Kids wanna rock	0.00
30	.70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	The girl who licked the home's nest	0.00
31	.60	76687854	06/06/2011 3:08 PM	.60	0.00	circulation	Egg carton mania	-10.00
32	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	The last patriot : a thriller	0.00
33	1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	Merle's door : lessons from a freethinking dog	0.00
34	1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation		0.00

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 10.00

Convert Change to Patron Credit

Payment

Change

Owed

Billed

Paid

Pending: -10.00

10.00

6.00

17.70

11.70

Checked: -10.00

0.00

10.00

JavaScript Application

This refund amount is not allowed because it exceeds the total amount of desk payments for this transaction.

Another way to "zero" this transaction is to use Add Billing and add a miscellaneous bill to counter the negative balance.

OK

Staff will see this error message

2:05 PM

2/18/2014

# 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

Select Bill Patron

## Current Bills

**Total Owed: 6.00**  
**Total Checked: 16.00**

**Refunds Available: 10.00**  
**Credit Available: 0.00**

## Pay Bill

Payment Type

Cash

Payment Received: 0.00

☐ Annotate Payment

## Bill Patron

#	Balance Owed	Patron #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
2	3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
3	.20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	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 Pruney-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 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	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
16	.10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
17	.10	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	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-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
24	.20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
25	.40	54295082	10/26/2009 1:16 PM	.40	0.00	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	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	.40	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 hornet'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 a freethinking dog	0.00

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment	Change	Owed	Billed	Paid
Pending: 0.00	0.00	6.00	17.70	11.70
Total:		16.00	17.70	1.70
Checked:				

Bill Patron Wizard

Transaction Type: Grocery

Billing Type: Miscellaneous

Amount: 10.00

Note: Bill # 30458782 - Fines forgiven and voided in error. Adding \$10.00 to cancel the error and zero the bill. DDale 2/15/14

Cancel Submit this Bill

Enter the Amount to zero out the negative charge and add a detailed note. Click **Submit this Bill**

10	✓	10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	The Muppet movie	0.00
11	✓	10	50990022	08/23/2009 5:24 PM	.10	0.00	circulation	Enchanted	0.00
12	✓	10	50990031	08/23/2009 5:24 PM	.10	0.00	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	0.00
13	✓	10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	The boy next door	0.00
14	✓	10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	All night near the water	0.00
15	✓	10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	The paper princess	0.00
16	✓	10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Good night, Princess Pruney-Toes	0.00
17	✓	10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	My many colored days	0.00
18	✓	10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	The Chipmunks sing the Beatles hits	0.00
19	✓	10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda and the glass slipper	0.00
20	✓	10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	OK computer	0.00
21	✓	10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Vinegar Hill	0.00
22	✓	.60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	Sing them home	0.00
23	✓	1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	Prodigal summer : a novel	0.00
24	✓	.20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Welcome to the world, Baby Girl	0.00
25	✓	.40	54295082	10/26/2009 1:16 PM	.40	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
26	✓	.40	54295088	10/26/2009 1:16 PM	.40	0.00	circulation	Ballerina flying	0.00
27	✓	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	Belinda, the ballerina	0.00
28	✓	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Maisy goes camping	0.00
29	✓	.40	54295076	10/26/2009 1:16 PM	.40	0.00	circulation	The loop	0.00
30	✓	.70				.70	circulation	Made for each other : the biology of the human-animal bond	0.00
31	✓	.60				.60	circulation	The Chipmunks sing the Beatles hits	0.00
32	✓	-10.00				0.00	circulation	OK computer	0.00
33	✓	1.20				1.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
34	✓	1.20				1.20	circulation	The bean trees : a novel	0.00

Attempting to clear this -\$10.00 lineitem

Registration

Refresh Check Out Items Out Holds Bills Edit Messages Other

25 1/5 \$ 6.00

Pay Bill

Payment Type: Cash

Payment Received: 0.00

Annotate Payment See Distribution Apply Payment!

Actions for Selected Transactions

Total Paid	Type	Title	Payment Pending
0.00	circulation	The Muppet movie	0.00
0.00	circulation	Enchanted	0.00
.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	0.00
0.00	circulation	The boy next door	0.00
0.00	circulation	All night near the water	0.00
0.00	circulation	The paper princess	0.00
0.00	circulation	Good night, Princess Pruney-Toes	0.00
0.00	circulation	My many colored days	0.00
0.00	circulation	The Chipmunks sing the Beatles hits	0.00
0.00	circulation	Belinda and the glass slipper	0.00
0.00	circulation	OK computer	0.00
0.00	circulation	Vinegar Hill	0.00
0.00	circulation	Sing them home	0.00
0.00	circulation	Prodigal summer : a novel	0.00
0.00	circulation	Welcome to the world, Baby Girl	0.00
0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
0.00	circulation	Ballerina flying	0.00
0.00	circulation	Belinda, the ballerina	0.00
0.00	circulation	Maisy goes camping	0.00
0.00	circulation	The loop	0.00
0.00	circulation	Made for each other : the biology of the human-animal bond	0.00
0.00	circulation	The Chipmunks sing the Beatles hits	0.00
0.00	circulation	OK computer	0.00
0.00	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
0.00	circulation	The bean trees : a novel	0.00
0.00	circulation	Dropped dead stitch	0.00
0.00	circulation	All the living	0.00
0.00	circulation	Pigs in heaven : a novel	0.00
0.00	circulation	Can you keep a secret?	0.00
0.00	circulation	Kids wanna rock	0.00
0.00	circulation	The girl who kicked the hornet's nest	0.00
0.00	circulation	Egg carton mania	0.00
0.00	circulation	The last patriot : a thriller	0.00
0.00	circulation	Merle's door : lessons from a freethinking dog	0.00

List Actions - Check All Uncheck All Check All Refunds Print Bills Receipt Options -

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

Convert Change to Patron Credit

Payment	Change	Owed	Billed	Paid
Pending: 0.00	0.00	Total: 6.00	17.70	11.70
Checked: 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.

Admin Help

Toggle Hotkeys

Item Status Patron Search Patron Registration

Refresh Check Out Items Out Holds Bills Edit Messages Other

25 1/5 \$16.00

Total Owed: 16.00

Total Checked: 26.00

Refunds Available: 10.00

Credit Available: 0.00

Pay Bill

Payment Type Cash

Payment Received: 0.00

☐ Annotate Payment

Bill Patron History

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	10.00	127455378	02/18/2014 2:24 PM	10.00	0.00	grocery		0.00
2	3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
3	3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
4	.20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	0.00
5	.60	47665568	06/25/2009 6:47 PM	.60	0.00	circulation	The boy next door	0.00
6	.10	50989984	08/23/2009 5:23 PM	.10	0.00	circulation	All night near the water	0.00
7	.10	50989980	08/23/2009 5:23 PM	.10	0.00	circulation	The paper princess	0.00
8	.10	50990014	08/23/2009 5:23 PM	.10	0.00	circulation	Good night, Princess Pruney-Toes	0.00
9	.10	50989997	08/23/2009 5:23 PM	.10	0.00	circulation	My many colored days	0.00
10	.10	50990015	08/23/2009 5:23 PM	.10	0.00	circulation	The Chipmunks sing the Beatles hits	0.00
11	.10	50990009	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda and the glass slipper	0.00
12	.10	50990022	08/23/2009 5:24 PM	.10	0.00	circulation	OK computer	0.00
13	.10	50990031	08/23/2009 5:24 PM	.10	0.00	circulation	Vinegar Hill	0.00
14	.10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home	0.00
15	.10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	Prodigal summer : a novel	0.00
16	.10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Welcome to the world, Baby Girl	0.00
17	.10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
18	.10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying	0.00
19	.10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina	0.00
20	.10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Maisy goes camping	0.00
21	.10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	The loop	0.00
22	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-animal bond	0.00
23	.60	51822185	09/09/2009 9:13 AM	1.00	.40	circulation	The Chipmunks sing the Beatles hits	0.00
24	1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	OK computer	0.00
25	.20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-wateri...	0.00
26	.40	54295082	10/26/2009 1:16 PM	.40	0.00	circulation	The bean trees : a novel	0.00
27	.40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch	0.00
28	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	All the living	0.00
29	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel	0.00
30	.40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Can you keep a secret?	0.00
31	.70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Kids wanna rock	0.00
32	.60	75822251	01/08/2011 3:08 PM	.60	0.00	circulation	The girl who kicked the hornet's nest	0.00
33	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	Egg carton mania	0.00
34	1.20	429800742	10/27/2013 10:04 AM	1.20	0.00	circulation	The last painter's skills	0.00

List Actions Check All Uncheck All Check All Refunds Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment Change

Pending: 0.00 0.00

Total: 16.00 27.70 11.70

Checked: 26.00 27.70 1.70

Owed Billed Paid

2:24 PM

2/18/2014

# Add Billing to Clear a Negative Charge: Recommended Method



Admin Help Toggle Hotkeys

Item Status Patron Search Patron Registration

Refresh Check Out Items Out Holds Bills Edit Messages Other

25 1/5 \$ 6.00

Current Bills

**Total Owed: 6.00**  
**Total Checked: -10.00**

**Refunds Available: 10.00**  
**Credit Available: 0.00**

Pay Bill  
Payment Type: Cash  
Payment Received: 0.00  
Annotate Payment See Distribution Apply Payment!

Bill Patron History

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	
1	3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	
2	3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	
3	.20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and get	
4	.60	47665568	06/25/2009 6:47 PM	.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				
8	.10	50989997	08/23/2009 5:23 PM	.10				
9	.10	50990015	08/23/2009 5:23 PM	.10				
10	.10	50990009	08/23/2009 5:23 PM	.10				
11	.10	50990022	08/23/2009 5:24 PM	.10				
12	.10	50990031	08/23/2009 5:24 PM	.10				
13	.10	50990039	08/23/2009 5:24 PM	.10	0.00	circulation	Vinegar Hill	
14	.10	50990041	08/23/2009 5:24 PM	.10	0.00	circulation	Sing them home	
15	.10	50990027	08/23/2009 5:24 PM	.10	0.00	circulation	Prodigal summer : a novel	
16	.10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Welcome to the world, Baby Girl	
17	.10	50990002	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	
18	.10	50990006	08/23/2009 5:23 PM	.10	0.00	circulation	Ballerina flying	
19	.10	50989992	08/23/2009 5:23 PM	.10	0.00	circulation	Belinda, the ballerina	
20	.10	50989972	08/23/2009 5:22 PM	.10	0.00	circulation	Maisy goes camping	
21	.10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	The loop	
22	.60	51822185	09/09/2009 9:13 AM	1.00	0.40	circulation	Made for each other : the biology of the human-animal bond	
23	1.00	51822187	09/09/2009 9:13 AM	1.00	0.00	circulation	The Chipmunks sing the Beatles hits	
24	.20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	OK computer	
25	.40	54295082	10/26/2009 1:16 PM	.40	0.00	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-water...	
26	.40	54295098	10/26/2009 1:16 PM	.40	0.00	circulation	The bean trees : a novel	
27	.40	54295090	10/26/2009 1:16 PM	.40	0.00	circulation	Dropped dead stitch	
28	.40	54295084	10/26/2009 1:16 PM	.40	0.00	circulation	All the living	
29	.40	54295075	10/26/2009 1:16 PM	.40	0.00	circulation	Pigs in heaven : a novel	
30	.70	44940071	05/12/2009 3:10 PM	1.40	.70	circulation	Can you keep a secret?	
31	.60	75087954	01/08/2011 9:08 PM	.60	0.00	circulation	Kids wanna rock	
32	-10.00	30458782	07/13/2008 3:40 PM	0.00	10.00	circulation	The girl who kicked the hornet's nest	
33	1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	Egg carton mania	-10.00
34	1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thriller	
						circulation	Merle's door : lessons from a freethinking dog	0.00

Actions for Selected Transactions

- Show in Catalog
- Show Item Details
- Void All Billings
- Refund
- Add Billing
- Full Details

Either right-click on the selected lineitem or select Actions for Selected Transactions → Add Billing

List Actions Check All Uncheck All Check All Refunds Print Bills Receipt Options

Voided this session: 0.00

**Change Due Upon Payment: 10.00**

Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	-10.00	10.00	6.00	17.70	11.70
Checked:			-10.00	0.00	10.00

Refresh Check Out Items Out Holds Bills Edit Messages Other  
25 1/5 \$ 6.00

Current Bills

**Total Owed: 6.00**  
**Total Checked: -10.00**

Bill Patron History

#	Balance Owed	Bill #	Start
1	3.00	126632709	01/27/2014 3:40 PM
2	3.00	126632737	01/27/2014 3:40 PM
3	.20	47665565	06/25/2009 6:40 AM
4	.60	47665568	06/25/2009 6:40 AM
5	.10	50989984	08/23/2009 5:10 PM
6	.10	50989980	08/23/2009 5:10 PM
7	.10	50990014	08/23/2009 5:10 PM
8	.10	50989997	08/23/2009 5:10 PM
9	.10	50990015	08/23/2009 5:10 PM
10	.10	50990009	08/23/2009 5:10 PM
11	.10	50990022	08/23/2009 5:10 PM
12	.10	50990031	08/23/2009 5:10 PM
13	.10	50990039	08/23/2009 5:10 PM
14	.10	50990041	08/23/2009 5:10 PM
15	.10	50990027	08/23/2009 5:10 PM
16	.10	50989987	08/23/2009 5:10 PM
17	.10	50990002	08/23/2009 5:10 PM
18	.10	50990006	08/23/2009 5:10 PM
19	.10	50989992	08/23/2009 5:10 PM
20	.10	50989972	08/23/2009 5:10 PM
21	.10	50989977	08/23/2009 5:10 PM
22	.60	51822185	09/09/2009 9:10 AM
23	1.00	51822187	09/09/2009 9:10 AM
24	.20	54295102	10/26/2009 1:10 PM
25	.40	54295082	10/26/2009 1:10 PM
26	.40	54295098	10/26/2009 1:10 PM
27	.40	54295098	10/26/2009 1:10 PM
28	.40	54295098	10/26/2009 1:10 PM
29	.40	54295098	10/26/2009 1:10 PM
30	.70	54295098	10/26/2009 1:10 PM
31	.60	75827251	01/08/2011 3:08 PM
32	-10.00	30458782	07/13/2008 3:40 PM
33	1.20	125208742	12/17/2013 10:04 AM
34	1.20	125208745	12/17/2013 10:04 AM

**Bill Patron**

Are you sure you would like to add a billing to bill 30458782?

Options

Yes No

Copy Message

Click Yes

List Actions Check All Uncheck All Check All Refunds Print Bills Receipt Options

Voided this session: 0.00

**Change Due Upon Payment: 10.00**

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	-10.00	10.00	6.00	17.70	11.70
Checked:			-10.00	0.00	10.00



Refresh Check Out Items Out Holds Bills Edit Messages Other  
 25 1/5 \$ 6.00

Current Bills

**Total Owed: 6.00**  
**Total Checked: -10.00**

Bill Patron History

#	Balance Owed	Bill #	Start	Total
1	3.00	126632709	01/27/2014 3:40 PM	3.00
2	3.00	126632737	01/27/2014 3:40 PM	3.00
3	.20	47665565	06/25/2009 6:47 PM	.60
4	.60	47665568	06/25/2009 6:47 PM	.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
8	.10	50989997	08/23/2009 5:23 PM	.10
9	.10	50990015	08/23/2009 5:23 PM	.10
10	.10	50990009	08/23/2009 5:23 PM	.10
11	.10	50990022	08/23/2009 5:24 PM	.10
12	.10	50990031	08/23/2009 5:24 PM	.10
13	.10	50990039	08/23/2009 5:24 PM	.10
14	.10	50990041	08/23/2009 5:24 PM	.10
15	.10	50990027	08/23/2009 5:24 PM	.10
16	.10	50989987	08/23/2009 5:23 PM	.10
17	.10	50990002	08/23/2009 5:23 PM	.10
18	.10	50990006	08/23/2009 5:23 PM	.10
19	.10	50989992	08/23/2009 5:23 PM	.10
20	.10	50989972	08/23/2009 5:22 PM	.10
21	.10	50989977	08/23/2009 5:22 PM	.10
22	.60	51822185	09/09/2009 9:13 AM	1.00
23	1.00	51822187	09/09/2009 9:13 AM	1.00
24	.20	54295102	10/26/2009 1:16 PM	.40
25	.40	54295082	10/26/2009 1:16 PM	.40
26	.40	54295098	10/26/2009 1:16 PM	.40
27	.40	54295090	10/26/2009 1:16 PM	.40
28	.40	54295084	10/26/2009 1:16 PM	.40
29	.40	54295075	10/26/2009 1:16 PM	.40
30	.70	44940071	05/12/2009 3:10 PM	1.40
31	.60	75827251	01/08/2011 3:08 PM	.60
32	-10.00	30458782	07/13/2008 3:40 PM	0.00
33	1.20	125208742	12/17/2013 10:04 AM	1.20
34	1.20	125208745	12/17/2013 10:04 AM	1.20

List Actions Check All Uncheck All Check All Refunds Print Bills

Voided this session: 0.00

**Change Due Upon Payment: 10.00**

☐ Convert Change to Patron Credit

Bill Patron Wizard

Summary

**Bill #** 30458782 **Total Billed** 0.00 **Title** Egg carton mania  
**Type** circulation **Total Paid** 10.00 **Checked Out** 07/13/2008 3:40 PM  
**Start** 07/13/2008 3:40 PM **Balance Owed** -10.00 **Due Date** 07/27/2008 3:40 PM  
**Finish** **Renewal?** **Checked In** 07/27/2008 12:00 AM

Create Bill

**Location** Georgia Public Library Service - Professiona  
**Transaction Type** Circulation  
**Billing Type** Miscellaneous  
**Amount** 10.00  
**Note**

Fines forgiven and voided in error. Adding \$10.00 back to this transaction to zero the bill. DDale 2/15/14

Cancel Submit this Bill

Enter the Amount to zero out the negative charge and add a detailed note. Click **Submit this Bill**

0.00	circulation	Kids wanna rock	0.00
0.00	circulation	The girl who kicked the hornet's nest	0.00
-10.00	circulation	Egg carton mania	-10.00
0.00	circulation	The last patriot : a thriller	0.00
0.00	circulation	Merle's door : lessons from a freethinking dog	0.00

Receipt Options

	Payment	Change	Owed	Billed	Paid
Pending:	-10.00	10.00	6.00	17.70	11.70
Checked:			-10.00	0.00	10.00

# Corrected Patron Bill

Admin Help  
Toggle Hotkeys

Item Status Patron Search Patron Registration

Refresh Check Out Items Out Holds Bills Edit Messages Other  
25 1/5 \$ 6.00

Current Bills

Total Owed: 16.00  
Total Checked: 16.00

Refunds Available: 0.00  
Credit Available: 0.00

Pay Bill  
Payment Type Cash  
Payment Received: 0.00  
☐ Annotate Payment

Bill Patron History

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 3.00	126632709	01/27/2014 3:40 PM	3.00	0.00	circulation	The Muppet movie	0.00
2	✓ 3.00	126632737	01/27/2014 3:40 PM	3.00	0.00	circulation	Enchanted	0.00
3	✓ .20	47665565	06/25/2009 6:47 PM	.60	.40	circulation	Keeping chickens : the essential guide to enjoying and getting the b...	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 Pruney-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 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	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
16	✓ .10	50989987	08/23/2009 5:23 PM	.10	0.00	circulation	Degas and the little dancer : a story about Edgar Degas	0.00
17	✓ .10	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	✓ .10	50989977	08/23/2009 5:22 PM	.10	0.00	circulation	Made for each other : the biology of the human-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
24	✓ .20	54295102	10/26/2009 1:16 PM	.40	.20	circulation	Jerry Baker's terrific tomatoes, sensational spuds, and mouth-water...	0.00
25	✓ .40	54295082	10/26/2009 1:16 PM	.40	0.00	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	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	✓ .40	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 hornet's nest	0.00
32	✓ 1.20	125208742	12/17/2013 10:04 AM	1.20	0.00	circulation	The last patriot : a thriller	0.00
33	✓ 1.20	125208745	12/17/2013 10:04 AM	1.20	0.00	circulation	Merle's door : lessons from a freethinking dog	0.00

List Actions Check All Uncheck All Check All Refunds Print Bills Receipt Options

Voided this session: 10.00

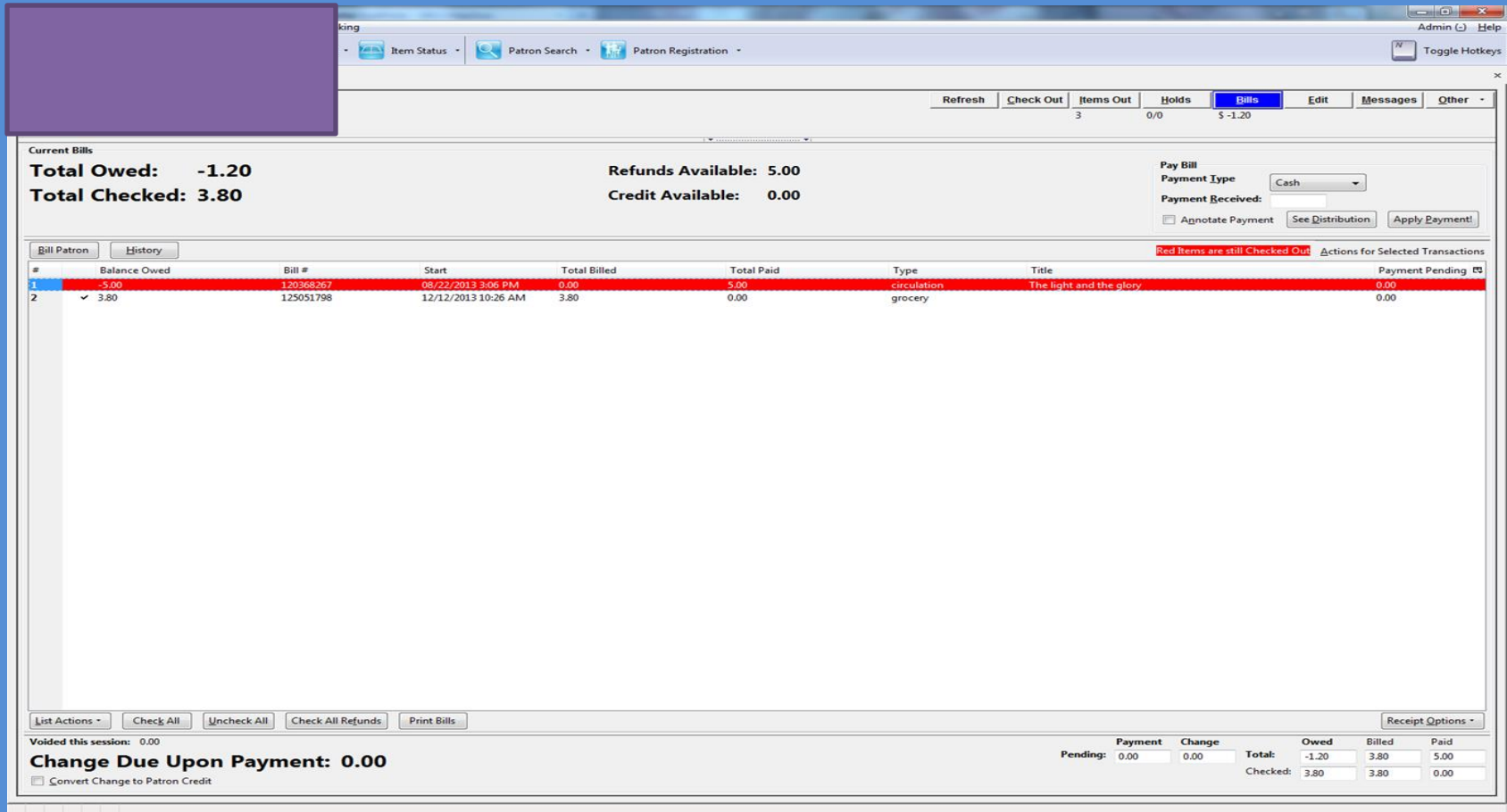
Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment	Change	Owed	Billed	Paid
Pending: 0.00	0.00	Total: 16.00	17.70	1.70
		Checked: 16.00	17.70	1.70

# 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.



The screenshot displays a library billing system interface. A purple rectangular box is positioned on the left side of the screen. The interface includes a top navigation bar with links for 'Item Status', 'Patron Search', and 'Patron Registration'. Below this, a toolbar contains buttons for 'Refresh', 'Check Out', 'Items Out', 'Holds', 'Bills' (which is highlighted), 'Edit', 'Messages', and 'Other'. The main content area is titled 'Current Bills' and shows the following summary:

- Total Owed: -1.20**
- Total Checked: 3.80**
- Refunds Available: 5.00**
- Credit Available: 0.00**

To the right of the summary, there is a 'Pay Bill' section with a 'Payment Type' dropdown set to 'Cash', a 'Payment Received' field, and buttons for 'Agnotate Payment', 'See Distribution', and 'Apply Payment!'. Below the summary, a table lists the bills:

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	-5.00	120368267	06/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory	0.00
2	✓ 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery		0.00

A red banner at the top of the table reads 'Red Items are still Checked Out'. Below the table, there are buttons for 'List Actions', 'Check All', 'Uncheck All', 'Check All Refunds', and 'Print Bills'. At the bottom left, it states 'Voided this session: 0.00' and 'Change Due Upon Payment: 0.00'. At the bottom right, there is a 'Receipt Options' section with a table showing 'Pending', 'Payment', 'Change', 'Total', 'Owed', 'Billed', and 'Paid' values.

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

Booking

Admin Help

CatalogItem StatusPatron SearchPatron Registration

Toggle Hotkeys

RefreshCheck OutItems OutHoldsBillsEditMessagesOther

30/0\$ -1.20

Current Bills

Total Owed: -1.20

Total Checked: 3.80

Refunds Available: 5.00

Credit Available: 0.00

Pay Bill

Payment TypeCash

Payment Received:

☐ Annotate Payment

See Distribution

Apply Payment!

Bill PatronHistory

Red Items are still Checked Out

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory
2	✓ 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery	

Either right-click on the selected lineitem or  
select **Actions for Selected Transactions** →  
**Full Details**

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

PaymentChange

Pending:0.000.00

Total:

OwedBilledPaid

Checked:3.803.800.00

# 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.

Total Billed0.00

Total Paid5.00

Balance Owed-5.00

Renewal?DESK

TitleThe light and the glory

Checked Out08/22/2013 3:06 PM

Due Date09/05/2013 11:59 PM

Checked In

Start08/22/2013 3:06 PM

Finish

Item Summary

#Alert Message

1

Total Circs7

List Actions \*

Show in Catalog

☐ Alternate View

Bills

#	Amount	Billing Type	Note	Void Time	Voided	When
1	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/13/2013 11:59 PM
2	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/14/2013 11:59 PM
3	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/18/2013 11:59 PM
4	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/24/2013 11:59 PM
5	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	10/04/2013 11:59 PM
6	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	10/03/2013 11:59 PM
7	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	10/02/2013 11:59 PM
8	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	10/01/2013 11:59 PM
9	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/30/2013 11:59 PM
10	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/28/2013 11:59 PM
11	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/27/2013 11:59 PM
12	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/26/2013 11:59 PM
13	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/25/2013 11:59 PM
14	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/23/2013 11:59 PM
15	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/21/2013 11:59 PM
16	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/20/2013 11:59 PM
17	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/19/2013 11:59 PM
18	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/17/2013 11:59 PM
19	.20	Overdue materials	System Generated Overdue FineSystem: VOIDED FOR BACKDATE	12/12/2013 10:23 AM	Yes	09/16/2013 11:59 PM
20	.20	Overdue materials	System Generated Overdue Fine	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 Actions \*

Edit note

Void selected billings

Payments

#	Amount	Note	Payment Type
1	1.20		cash_payment
2	3.80		forgive_payment

List Actions \*

Edit note

Close Window



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.

Booking

Admin Help

Catalog Item Status Patron Search Patron Registration

Toggle Hotkeys

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

30/0\$ -1.20

Current Bills

Total Owed: -1.20

Total Checked: 3.80

Refunds Available: 5.00

Credit Available: 0.00

Pay Bill

Payment TypeCash

Payment Received0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Red Items are still Checked Out

Actions for Selected Transactions

Show in Catalog

Show Item Details

Void All Billings

Refund

Add Billing

Full Details

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory
2	✓ 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery	

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total

Owed

Billed

Paid

Pending: 0.00

0.00

0.00

-1.20

3.80

5.00

Checked: 3.80

3.80

0.00

# Full Details of the \$3.80 Bill Lineitem



Start		12/12/2013 10:26 AM	
Finish			
Total Billed		3.80	
Total Paid		0.00	
Balance Owed		3.80	
Renewal?			

Bills					
#	Amount	Billing Type	Note	Voided	When
1	3.80	Miscellaneous	BALANCE ACCOUNT TO ZERO AFTER FINE FORGIVE AND CLAIMS RETURNED.	No	12/12/2013 10:26 AM

Payments						
#	Amount	Note	Payment Type	Staff	When	Workstation

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.

Admin Help

Toggle Hotkeys

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

30/0\$ -1.20

Current Bills

Total Owed: -1.20

Total Checked: 3.80

Refunds Available: 5.00

Credit Available: 0.00

Pay Bill

Payment TypeCash

Payment Received:

Annotate Payment

See Distribution

Apply Payment!

Bill PatronHistory

Red items are still Checked OutActions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory	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

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	0.00	0.00	-1.20	3.80	5.00
Checked:			3.80	3.80	0.00

# An Attempt to Refund the \$5.00

Current Bills

**Total Owed: -1.20**  
**Total Checked: -5.00**

**Refunds Available: 5.00**  
**Credit Available: 0.00**

Pay Bill  
Payment Type: Cash

3. Click Apply Payment

Apply Payment!

Red Items are still Checked Out Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory	-5.00
2	3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery		0.00

1. Click Uncheck All  
2. Click Check All Refunds

Change Due Upon Payment: 5.00

Convert Change to Patron Credit

Receipt Options

	Payment	Change	Owed	Billed	Paid
Pending:	-5.00	5.00	Total: -1.20	3.80	5.00
Checked:	-5.00			0.00	5.00

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

The screenshot displays a library management system interface. A purple rectangular box is positioned in the upper-left corner. The interface includes a top navigation bar with links for 'Catalog', 'Item Status', 'Patron Search', and 'Patron Registration'. Below this, a toolbar contains buttons for 'Refresh', 'Check Out', 'Items Out', 'Holds', 'Bills', 'Edit', 'Messages', and 'Other'. The 'Bills' button is highlighted. The main content area shows 'Current Bills' with the following summary:

<b>Total Owed:</b>	<b>-1.20</b>	<b>Refunds Available:</b>	<b>5.00</b>
<b>Total Checked:</b>	<b>-5.00</b>	<b>Credit Available:</b>	<b>0.00</b>

To the right of the summary, there is a 'Pay Bill' section with a 'Payment Type' dropdown set to 'Cash', a 'Payment Received' field set to '0.00', and buttons for 'Annotate Payment', 'See Distribution', and 'Apply Payment!'. Below the summary, a table lists bill transactions:

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory	-5.00
2	3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery		0.00

A red banner above the table states 'Red Items are still Checked Out'. A JavaScript error dialog box is centered on the screen, with a red border. The dialog contains a warning icon and the following text:

[JavaScript Application]

This refund amount is not allowed because it exceeds the total amount of desk payments for this transaction.  
Another way to "zero" this transaction is to use Add Billing and add a miscellaneous bill to counter the negative balance.

OK

At the bottom of the interface, there is a 'List Actions' section with buttons for 'Check All', 'Uncheck All', 'Check All Refunds', and 'Print Bills'. A 'Receipt Options' dropdown is also present. The bottom status bar shows 'Voided this session: 0.00' and 'Change Due Upon Payment: 5.00'. A checkbox for 'Convert Change to Patron Credit' is located below the change due amount. On the right side of the status bar, a table summarizes the current state:

	Payment	Change	Total	Owed	Billed	Paid
Pending:	-5.00	5.00	-1.20	3.80	5.00	
Checked:			-5.00	0.00		5.00

The Windows taskbar at the bottom shows the system clock as 3:17 PM on 2/18/2014.

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

Admin (-) Help  
Toggle Hotkeys

Refresh Check Out Items Out Holds Bills Edit Messages Other

3 0/0 \$ -1.20

Current Bills

**Total Owed: -1.20**  
**Total Checked: -5.00**

**Refunds Available: 5.00**  
**Credit Available: 0.00**

Pay Bill  
Payment Type: Cash  
Payment Received: 0.00  
☐ Annotate Payment  

Bill Patron History

Red Items are still Checked Out

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title
1	-5.00	120368267	08/22/2013 3:06 PM	0.00	5.00	circulation	The light and the glory
2	3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery	

Actions for Selected Transactions

- Show in Catalog
- Show Item Details
- Void All Billings
- Refund
- Add Billing
- Full Details

Voided this session: 0.00

**Change Due Upon Payment: 5.00**

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	-5.00	5.00	-1.20	3.80	5.00
Checked:			-5.00	0.00	5.00

Refresh Check Out Items Out Holds Bills Edit Messages Other  
3 0/0 \$ -1.20

Current Bills

Total Owed: -1.20  
Total Checked: -5.00

Refunds Available: 5.00  
Credit Available: 0.00

Pay Bill  
Payment Type: Cash  
Payment Received: 0.00  
☐ Annotate Payment

Bill Patron History

#	Balance Owed	Bill #	Start	Total Billed
1	-5.00	120368267	08/22/2013 3:06 PM	0.00
2	3.80	125051798	12/12/2013 10:26 AM	3.80

Bill Patron

Are you sure you would like to add a billing to bill 120368267?

Options

Click Yes

List Actions Check All Uncheck All Check All Refunds Print Bills

Voided this session: 0.00

Change Due Upon Payment: 5.00

☐ Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	-5.00	5.00		-1.20	3.80	5.00
Checked:				-5.00	0.00	5.00

Other

\$ -1.20

Apply Payment!

[Submit this Bill](#)

	Payment	Change		Owed	Billed	Paid
Pending:	-5.00	5.00	Total:	-1.20	3.80	5.00
			Checked:	-5.00	0.00	5.00



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.

Admin ( ) Help

Toggle Hotkeys

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

3

0/0

\$ 3.80

Current Bills

Total Owed: 3.80

Total Checked: 3.80

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type: Cash

Payment Received: 0.00

Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Red Items are still Checked Out

Actions for Selected Transactions

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 3.80	125051798	12/12/2013 10:26 AM	3.80	0.00	grocery		0.00

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

Convert Change to Patron Credit

Payment

Change

Total

Owed

Billed

Paid

Pending: 0.00

0.00

Total: 3.80

3.80

0.00

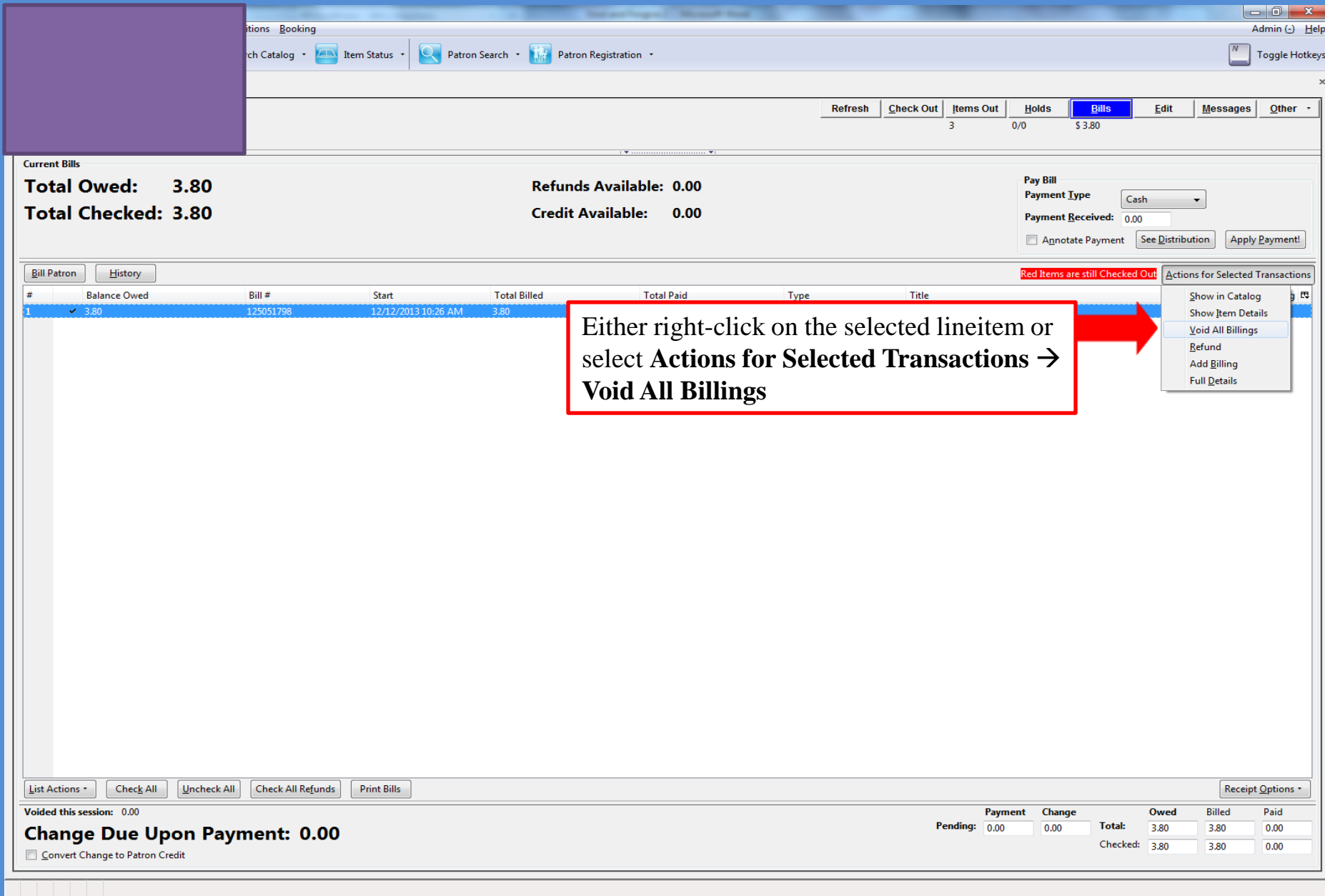
Checked: 3.80

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



The screenshot shows a library management software interface. The top navigation bar includes 'Admin', 'Help', and 'Toggle Hotkeys'. The main menu has 'Refresh', 'Check Out', 'Items Out', 'Holds', 'Bills' (selected), 'Edit', 'Messages', and 'Other'. The 'Bills' tab shows a summary of current bills with the following information:

- Total Owed: 3.80**
- Total Checked: 3.80**
- Refunds Available: 0.00**
- Credit Available: 0.00**

Below the summary, there is a table of bills. The first bill is selected (highlighted in blue):

#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Type	Title
1	3.80	125051798	12/12/2013 10:26 AM	3.80			

A red box highlights the text: "Either right-click on the selected lineitem or select **Actions for Selected Transactions** → **Void All Billings**". A red arrow points from this box to the 'Void All Billings' option in the 'Actions for Selected Transactions' menu.

The 'Actions for Selected Transactions' menu is open, showing the following options:

- Show in Catalog
- Show Item Details
- Void All Billings
- Refund
- Add Billing
- Full Details

At the bottom of the interface, there is a summary section with the following information:

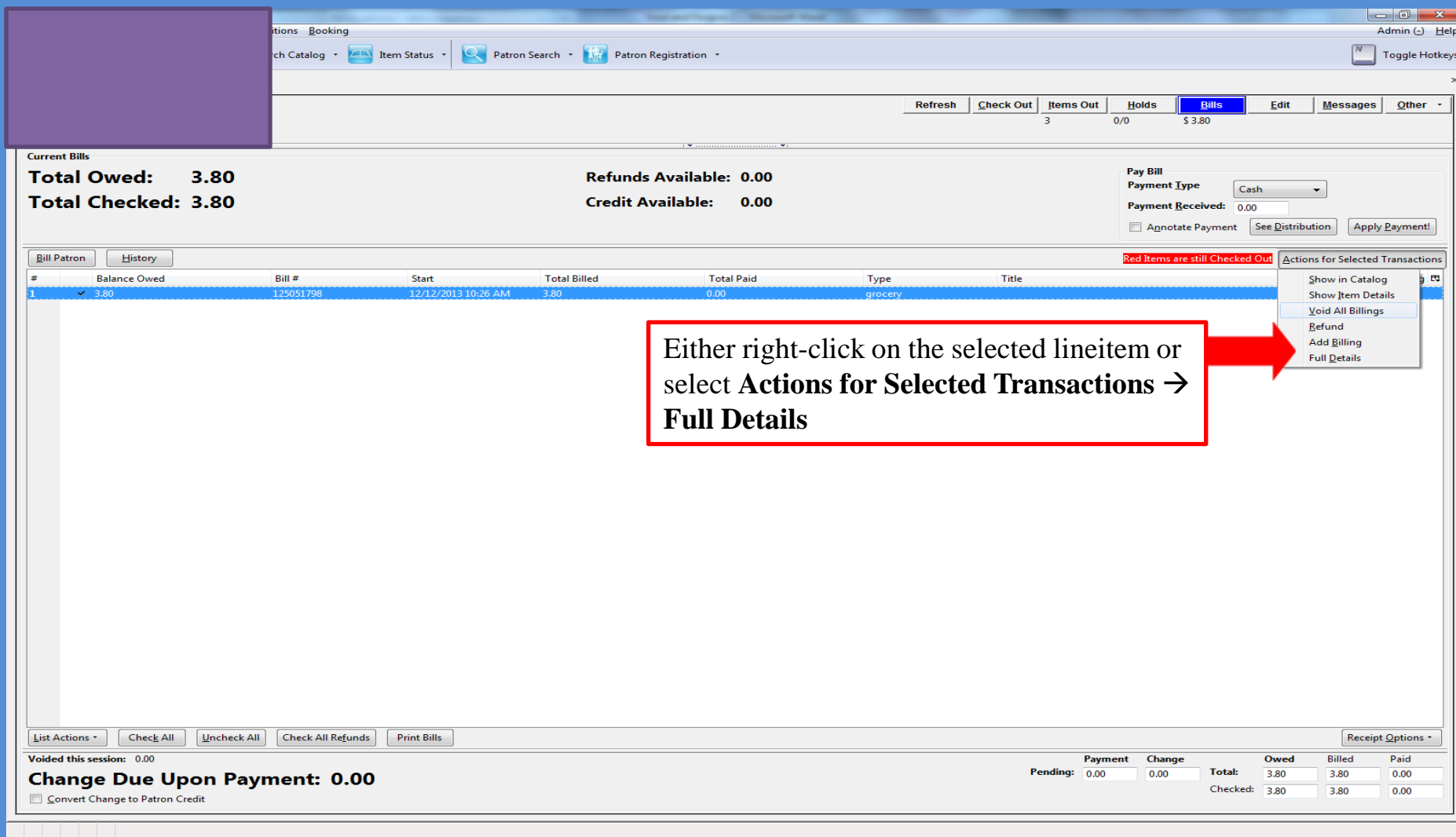
- Voided this session: 0.00**
- Change Due Upon Payment: 0.00**
- ☐ Convert Change to Patron Credit

On the right side of the bottom section, there is a table showing the payment status:

	Payment	Change	Owed	Billed	Paid
Pending:	0.00	0.00	3.80	3.80	0.00
Checked:	3.80		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.



The screenshot shows a library billing system interface. A red callout box with a red arrow points to the 'Full Details' option in a right-click context menu. The context menu is open over a table of transactions, with the first row selected. The menu options are: Show in Catalog, Show Item Details, Void All Billings, Refund, Add Billing, and Full Details. The 'Full Details' option is highlighted. The interface also displays a 'Current Bills' section with 'Total Owed: 3.80' and 'Total Checked: 3.80'. A 'Pay Bill' section shows 'Payment Type: Cash' and 'Payment Received: 0.00'. A table at the bottom shows 'Change Due Upon Payment: 0.00' and a summary of payments and amounts.

Current Bills

**Total Owed: 3.80**  
**Total Checked: 3.80**

Refunds Available: 0.00  
Credit Available: 0.00

Pay Bill  
Payment Type: Cash  
Payment Received: 0.00  
☐ Annotate Payment  

Red Items are still Checked Out

Actions for Selected Transactions

- Show in Catalog
- Show Item Details
- Void All Billings
- Refund
- Add Billing
- Full Details

Either right-click on the selected lineitem or select **Actions for Selected Transactions** → **Full Details**

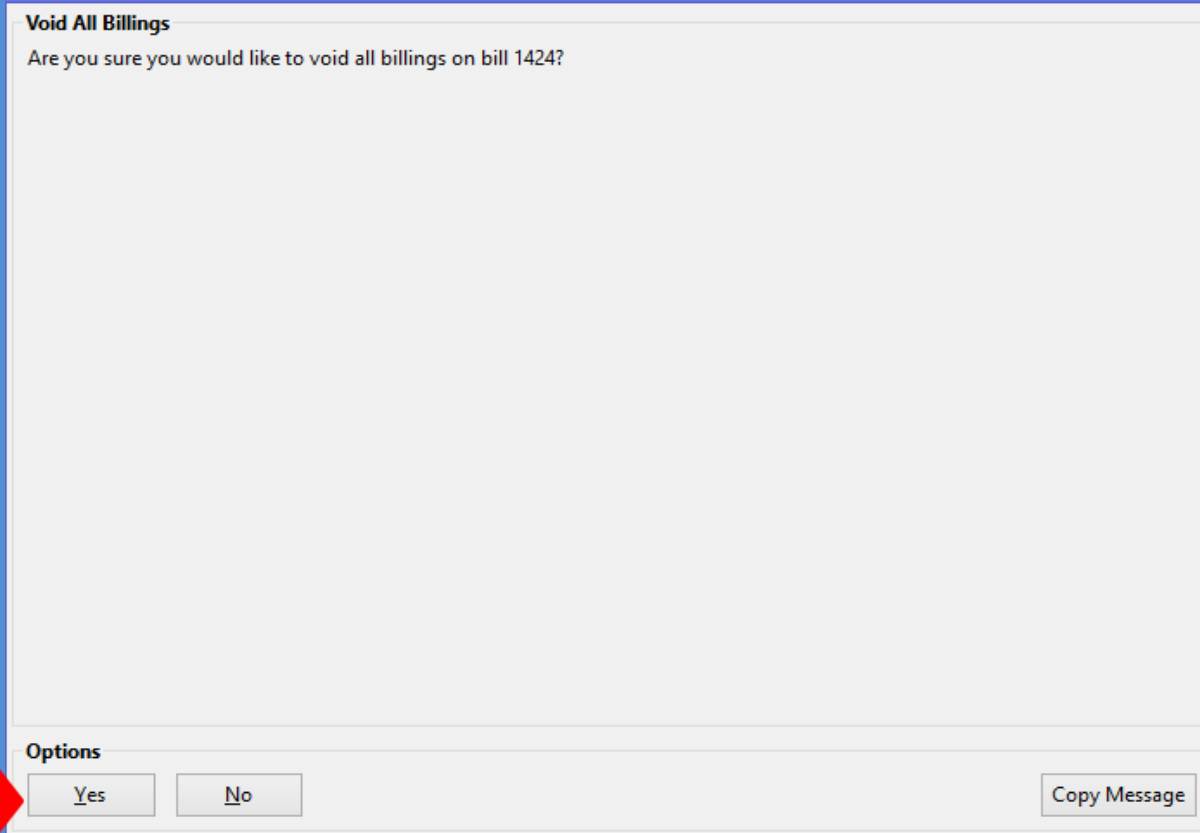
Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

	Payment	Change	Total	Owed	Billed	Paid
Pending:	0.00	0.00		3.80	3.80	0.00
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.



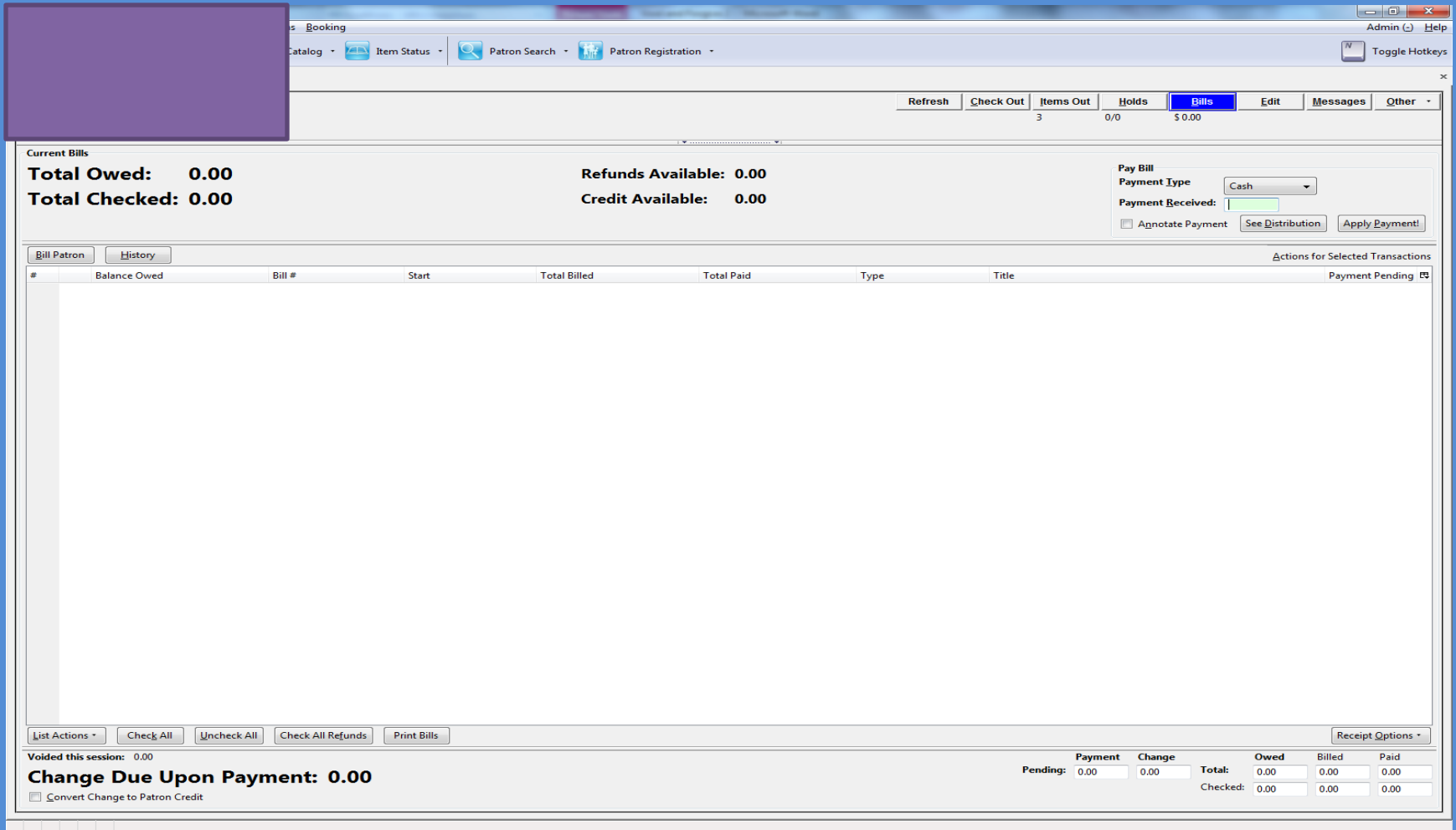
The screenshot shows a web-based confirmation dialog box titled "Void All Billings". The main text inside the dialog asks, "Are you sure you would like to void all billings on bill 1424?". At the bottom of the dialog, there is a section labeled "Options" which contains two buttons: "Yes" and "No". To the left of the "Yes" button, there is a red rectangular box containing the text "Click Yes" and a red arrow pointing directly at the "Yes" button. To the right of the "Options" section, there is a button labeled "Copy Message".

**Void All Billings**  
Are you sure you would like to void all billings on bill 1424?

**Options**

# 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.



The screenshot shows a web application interface for managing patron accounts. A purple rectangular box is overlaid on the top left of the interface. The main content area displays the 'Current Bills' section with the following information:

- Total Owed: 0.00**
- Total Checked: 0.00**
- Refunds Available: 0.00**
- Credit Available: 0.00**

Below this information is a table with columns: #, Balance Owed, Bill #, Start, Total Billed, Total Paid, Type, Title, and Payment Pending. The table is currently empty. To the right of the table, there are buttons for 'Bill Patron' and 'History'. Further right, there is a 'Pay Bill' section with a 'Payment Type' dropdown set to 'Cash', a 'Payment Received' input field, and buttons for 'Annotate Payment', 'See Distribution', and 'Apply Payment!'. At the bottom of the interface, there is a 'Voided this session: 0.00' section, a 'Change Due Upon Payment: 0.00' section, and a 'Receipt Options' section. The 'Change Due Upon Payment' section includes a checkbox for 'Convert Change to Patron Credit'. The 'Receipt Options' section includes a table with columns: Pending, Payment, Change, Total, Owed, Billed, and Paid, with values for each column.

Pending	Payment	Change	Total	Owed	Billed	Paid
0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Checked:	0.00	0.00	0.00

# Pay Bill

Winchester, John

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other

0

0/0

\$ 9.90

(Has Bills)

## Current Bills

Total Owed: 9.90

Refunds Available: 0.00

Total Checked: 9.90

Credit Available: 0.00

### Pay Bill

Payment Type

Cash

Payment Received:

0.00

☐ Annotate Payment

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

# Pay Bill

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Owed

Billed

Paid

Pending:

0.00

0.00

Total:

9.90

9.90

0.00

Checked:

9.90

9.90

0.00



# Payment Types

- Cash

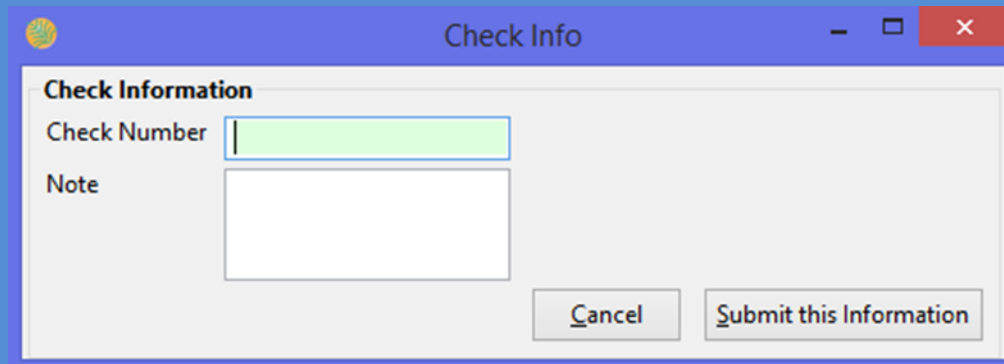
# Payment Types

- 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).



Check Info

**Check Information**

Check Number

Note

Cancel    Submit this Information

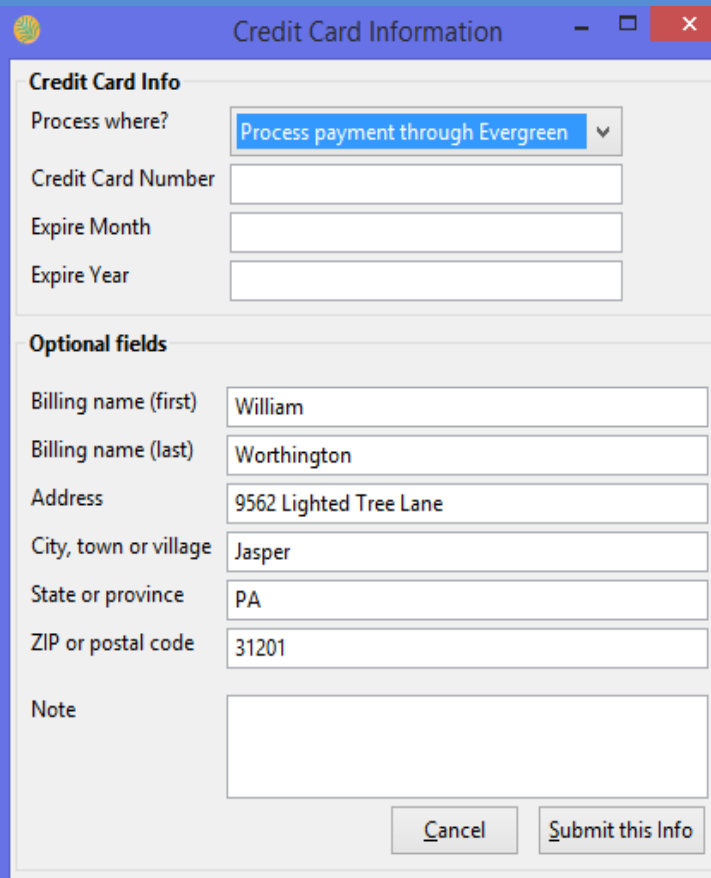
# Payment Types

- 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)

Billing name (last)

Address

City, town or village

State or province

ZIP or postal code

Note

# Payment Type

## Credit Card

- Payment Processing Services: AuthorizeNet, PayflowPro, PayPal, Stripe
- A few of the Library Settings (Admin → Local Administration → 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:  
<https://tinyurl.com/olf7h44>
  - Launchpad Ticket #1227871: <https://bugs.launchpad.net/evergreen/+bug/1227871>

# Example of Patron OPAC Account with PayPal

Account Summary

Items Checked Out

Holds

Account Preferences

My Lists

## Account Summary

ITEMS CURRENTLY CHECKED OUT (4) [View All](#)

ITEMS CURRENTLY ON HOLD (9) [View All](#)

ITEMS READY FOR PICKUP (0) [View All](#)

Note title	Content
Left Library Card at APEX branch	You can pick it up at the APEX Circ desk [ ELR 2014-03-04 @ APEX ]

Patrons can pay  
fines in full

Fines: \$42.69

[Pay Fines](#)

Fines

Payments

### Fines

Title	Author	Checkout Date	Due Date	Date Returned	Balance Owed	<input checked="" type="checkbox"/> Pay Fines
<a href="#">Shattered : a novel</a>	<a href="#">DuPree, Kia</a>	03/04/2014	03/28/2014	(fines accruing)	<b>\$2.00</b>	<input checked="" type="checkbox"/>
<a href="#">In the tall, tall grass</a>	<a href="#">Fleming, Denise, 1950-</a>	03/05/2014	03/01/2014	(fines accruing)	<b>\$0.70</b>	<input checked="" type="checkbox"/>
<a href="#">Dragonseye</a>	<a href="#">McCaffrey, Anne</a>	03/05/2014	03/19/2014	(fines accruing)	<b>\$39.99</b>	<input checked="" type="checkbox"/>

[Pay selected fines](#)

# Example of Patron OPAC Account with PayPal

Account Summary

Items Checked Out

Holds

Account Preferences

My Lists

## Account Summary

ITEMS CURRENTLY CHECKED OUT (4) [View All](#)

ITEMS CURRENTLY ON HOLD (9) [View All](#)

ITEMS READY FOR PICKUP (0) [View All](#)

Note title	Content
Left Library Card at APEX branch	You can pick it up at the APEX Circ desk [ ELR 2014-03-04 @ APEX ]

Patrons can pay  
fines in full

Fines: \$42.69

Pay Fines

Fines

Payments

## Fines

Title	Author	Checkout Date	Due Date	Date	Amount
<a href="#">Shattered : a novel</a>	<a href="#">DuPree, Kia</a>	03/04/2014	03/28/2014	(fine)	
<a href="#">In the tall, tall grass</a>	<a href="#">Fleming, Denise, 1950-</a>	03/05/2014	03/01/2014	(fines accruing)	\$0.70
<a href="#">Dragonseye</a>	<a href="#">McCaffrey, Anne</a>	03/05/2014	03/19/2014	(fines accruing)	\$39.99

Or, they can pay  
selected fines

☒ Pay Fines



Pay selected fines



# Example of Patron OPAC Account with PayPal

Fines

Payments

## Billing Information

First Name

Last Name

Email Address

Street Address

City

State or Province

ZIP or Postal Code

## Credit Card Information

Credit Card #

Security Code

Expiration Month

Expiration Year

[Update](#)

[Next](#) [Cancel](#)

Selected fines you are paying for:

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

Total amount to pay: **\$42.69**

Click **Cancel** to go 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.

# Payment Types

- Cash
- Check
- Credit Card
- Patron Credit

# Payment Type

## Patron Credit

### Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

#### Pay Bill

Payment Type

Cash

Payment Received:

10.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	8.90	1413		Copies	2014-0...	8.90	0.00	grocery		8.90
2	✓	1.00	1414		Fee for DVD case	2014-0...	1.00	0.00	grocery		1.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: .10**

☒ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	9.90	.10	Total: 9.90	9.90	0.00
			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

**Total Owed: 9.90**

**Total Checked:**

**Refunds Available: 0.00**

**Credit Available no longer exposed**

**Patron Credit is not a payment option**

**Pay Bill**

Payment Type: **Cash**

Payment Received:

☐ Annotate Payment

**Actions for Selected Transactions**

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 8.90	1413		Copies	2014-0...	8.90	0.00	grocery		0.00
2	✓ 1.00	1414		Fee for DVD case	2014-0...	1.00	0.00	grocery		0.00

**Convert Change to Patron Credit checkbox no longer exposed**

**Change Due Upon Payment: 0.00**

**Payment Change Owed Billed Paid**

Pending: 0.00 0.00 **Total:** 9.90 9.90 0.00

Checked: 9.90 9.90 0.00

# Payment Types

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

# Payment Type Work



Hey...every PP presentation needs at least one stock clip art added.

- Some libraries allow patrons to work off their fines.

# Payment Types

- 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

<https://bugs.launchpad.net/evergreen/+bug/1198465>

- Recent Open ILS Mailing List Discussion

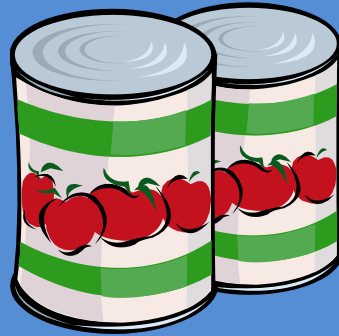
<http://markmail.org/thread/yji6kuzv2ks3pmej>



# Payment Types

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

# Payment Type Goods



Okay, maybe two...

- 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

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Enter the amount received

Bill Patron

History

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Checked:

Pending: 0.00

0.00

9.90

9.90

Owed

Billed

Paid

9.90

9.90

0.00

9.90

9.90

0.00

# Pay Bill

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

#		Balance Owed	Bill #	Last Billing		al Paid	Type	Title	Payment Pending
1	✓	8.90	1413				grocery		0.00
2	✓	1.00	1414		Fee for DVD case 201...	1.00	0.00	grocery	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	0.00	0.00		9.90	9.90	0.00
Checked:				9.90	9.90	0.00

• If staff need to add a payment note, check Annotate Payment.

• Checkbox is “sticky” meaning it will remain checked until staff uncheck it.

# 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**  
**Total Checked: 12.64**

**Refunds Available: 0.00**  
**Credit Available: 0.00**

**Pay Bill**  
Payment Type: Cash  
Payment Received: 5.00  
☒ Annotate Payment

Bill PatronHistory

#	Balance Owed	Bill #
1	✓ 4.64	1422
2	✓ 8.00	1421

List Actions ▼Check AllUncheck AllCheck All RefundsPrint BillsReceipt Options ▼

[JavaScript Application]

?

Please annotate this payment:

ELR took payment @APEX

OKCancel

Actions for Selected Transactions

Total Paid	Type	Title	Payment Pending
4.64	grocery		4.64
.36	grocery		.36

Voided this session: 0.00

**Change Due Upon Payment: 0.00**  
☐ Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	5.00	0.00		12.64	23.00	10.36
Checked:				12.64	23.00	10.36

# Pay Bill

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment TypeCash ▾

Payment Received: 0.00

See Distribution

Apply Payment!

Bill PatronHistory

#	Balance Owed	Bill #	Last Billing Note	Last Billing	Title	Payment Pending
1	✓ 8.90	1413		Copies		0.00
2	✓ 1.00	1414	Fee for DVD case	201... 1.00	0.00 grocery	0.00

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Pending: 0.00

Payment Change

0.00

Total:

Owed

9.90

Checked:

Billed

9.90

Paid

0.00

• View the distribution of the payment.

• Updates the **Payment Pending** column and the **Pending: Payment**

# Pay Bill

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

0

0/0

\$ 9.90

(Has Bills)

## Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

### Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

**Click Apply Payment!**

Apply Payment!

Bill Patron

History

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

0.00

0.00

Total:

Owed

9.90

Billed

9.90

Paid

0.00

Checked:

9.90

9.90

0.00

# Actions for Selected Transactions

Winchester, John

Refresh

Check Out

Items Out

Holds

**Bills**

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment Type

Cash ▾

Payment Received:

0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Either click **Actions for Selected Transactions**

Actions for Selected Transactions

#		Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total	Title	Payment Pending	
1	✓	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

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Pending:

0.00

0.00

9.90

Owed

Billed

Paid

9.90

9.90

0.00

Checked:

9.90

9.90

0.00



# Actions for Selected Transactions

Winchester, John

Refresh

Check Out

Items Out

Holds

Bills

Edit

Messages

Other ▾

00/00\$ 9.90

(Has Bills)

Current Bills

Total Owed: 9.90

Total Checked: 9.90

Refunds Available: 0.00

Credit Available: 0.00

Pay Bill

Payment TypeCash ▾

Payment Received: 0.00

☐ Annotate Payment

See Distribution

Apply Payment!

Bill Patron

History

Either click **Actions for Selected Transactions**

→

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total	Title	Payment Pending	
1	✓ 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

Or Right-Click on a selected lineitem

List Actions ▾

Check All

Uncheck All

Check All Refunds

Print Bills

Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

☐ Convert Change to Patron Credit

Payment

Change

Total:

Owed

Billed

Paid

Pending:

0.00

0.00

9.90

9.90

0.00

Checked:

9.90

9.90

0.00

# 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**  
**Total Checked: 9.90**

**Refunds Available: 0.00**  
**Credit Available: 0.00**

Pay Bill

Payment Type: Cash

Payment Received:

☐ Annotate Payment

Bill Patron History

Actions for Selected Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 8.90	1413		Copies	2014-0...	8.90	0.00	grocery		0.00
2	✓ 1.00	1414		Fee for DVD case	2014-0...	1.00	0.00	grocery		0.00

List Actions + Check All Uncheck All Check All Refunds Print Bills

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

Payment Change

Pending:

Total:

Checked:

Receipt Options +

Receipt Upon Payment

Printer Prompt

Number of Copies:

# History

## Current Bills

**Total Owed: 9.90**

**Refunds Available: 0.00**

**Total Checked: 9.90**

**Credit Available: 0.00**

### Pay Bill

Payment Type

Cash

Payment Received:

☐ Annotate Payment

[Bill Patron](#)

[History](#)

Click **History** to view the patron's billing transactions and history

Actions for Selected Transactions

#	Balance Owed	Bill #	Type	Start	Total Billed	Total Paid	Type	Title	Payment Pending
1	✓ 8.90	1413	copies	2014-0...	8.90	0.00	grocery		0.00
2	✓ 1.00	1414	Fee for DVD case	2014-0...	1.00	0.00	grocery		0.00

[List Actions](#)

[Check All](#)

[Uncheck All](#)

[Check All Refunds](#)

[Print Bills](#)

[Receipt Options](#)

Voided this session: 0.00

**Change Due Upon Payment: 0.00**

☐ Convert Change to Patron Credit

	Payment	Change	Owed	Billed	Paid
Pending:	0.00	0.00	Total: 9.90	9.90	0.00
			Checked: 9.90	9.90	0.00

# Bill History

Transactions Payments

Selected Billed: 0.00 Selected Paid: 0.00

Filter by  
date range

Start Date 03/ 16/ 2013 End Date 03/ 16/ 2014 Retrieve Transactions

#	Balance Owed	Bill #	Last Billing Note	Last Billing Type	Total Billed	Total Paid	Type	Title	
1	0.00	1409			2014-03-... 0.00	0.00	circulation	The omnivore's dilemma : 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		

List Actions \*

Print

Add Billing

Show Item Details

Full Details

# Cash Reports

- **Cash Reports** (Admin → Local Administration → Cash Reports)

Cash Reports +

Go Back Reload Go Forward Debug Print Page

Welcome admin

Select Start and End Dates → Start Date: 2014-01-01 (YYYY-MM-DD) End Date: 2014-03-16 (YYYY-MM-DD)

View reports for : Apex Branch Select Branch

Submit

Track cash, credit card, or check payments made at workstations registered at selected branch → Desk Payments

<u>workstation</u>	<u>cash payment</u>	<u>check payment</u>	<u>credit card payment</u>
APEX-EricaR	842.98	15.10	0.00
	842.98	15.10	0.00

Track patron credit, forgive, work, and good payment  
Note: home library of staff who accepted the payment also has to match the workstation library where the report is run

User Payments

<u>usr</u>	<u>credit payment</u>	<u>forgive payment</u>	<u>work payment</u>	<u>goods payment</u>
admin	0.36	1.60	0.00	0.00
	0.36	1.60	0.00	0.00