



# Credits and Messages and Bills!! Oh My!!

BC Libraries Cooperative - Continuing Training Webinar

## Library Settings Editor

Desired Behaviour	Setting	Value
Always void lost charges	Circulation : Void lost item billing when returned	TRUE
	Circulation : Void processing fee on lost item return	TRUE
Void lost charges if returned within a specified time period	Circulation : Void lost max interval	Time Interval "6 months"
	Circulation : Void lost item billing when returned	TRUE
	Circulation : Void processing fee on lost item return	TRUE
Never void lost charges	Circulation : Void lost item billing when returned	FALSE
	Circulation : Void processing fee on lost item return	FALSE
Restore existing overdue fines	Circulation : Restore overdues on lost item return	TRUE
Generate NEW overdue fines based on the check in date.	Circulation : Lost Checkin Generates New Overdues	TRUE
	Circulation : Restore overdues on lost item return	TRUE

## Other Settings

Finances: Lost Materials Processing Fee

- The amount charged in addition to item price when an item is marked lost.

Finances: Default Item Price

- Replacement charge for lost items if price is unset in the Copy Editor.

Finances: Charge lost on zero

- If set to TRUE, when Lost item price is \$0.00, the replacement cost will = **Default Item Price**

Finances: Disable Patron Credit

- Use if your Library does not allow patrons to accrue credit or pay fines/fees with accrued credit.
- If set to TRUE, Patron Credit will not be displayed on Bills screen.

## Forgive vs Void

- **Void** if it never should have existed
  - bill will be gone completely (no record)
  - can void all or individual (Right click or Actions for Selected Transactions)
- **Forgive** if you not charging them the fee for some reason (food for fines / extenuating circumstances)
  - Remember **Forgive is a Payment type**
  - Remember to **Annotate payments**
    - We recommend that you enter the reason why the fine was forgiven

## Reports

**Cash Reports** = Admin → Local Admin → Cash Reports

The output will show cash, check, and credit card payments. It will also show amounts for credits, forgiven payments, work payments and goods payments (e.g. food for fines initiatives, replacement copy for lost item, etc.)

**Sitka Templates** = Admin → Local Admin → Reports → Shared Folders → Sitka Templates

Customized payment reports can be created from the reports interface. There are a few report templates that can be used to generate Bill related reports.

- Bills\_Payments
  - **Bills with negative balance (with patron information)**
- Patrons
  - **Patrons exceeding bill threshold [Patron Exceeds Fines Group Penalty Threshold]**