

INSTRUCTIONS: Adding notes to fine payments and write offs

Note must be filled in before you click Write Off Button. If you forget then you need to use the add note tab.

Example 1: If you write note in Payment note space before you click...

Select all | Clear all

Hide/Unhide \$0.00 balances Filter: Clear

Fines & charges	Description	Payment note	Account type	Notify id	Level	Amount	Amount outstanding
<input checked="" type="checkbox"/> Pay Write off	Fine , F 659452 (Danielle Steel's safe harbour)	explanation of write off		1	0	10.00	10.00
						Sub total:	10.00
						Total Due:	10.00

Pay amount Write off all Pay selected Cancel

Resulting in the following on patron's record:

Date	Description of charges	Note	Amount	Outstanding	Print
08/06/2014	Fine , F 659452 View item Danielle Steel's safe harbour	he's done it again!	10.00	0.00	Print
08/06/2014	Writeoff , Writeoff View item Danielle Steel's safe harbour	explanation of write off	10.00	0.00	Print

Example 2: If you forget to write note before you click...

Select all | Clear all

Hide/Unhide \$0.00 balances Filter: Clear

Fines & charges	Description	Payment note	Account type	Notify id	Level	Amount	Amount outstanding
<input checked="" type="checkbox"/> Pay Write off	Fine , F 593610 (The ranger, the cook and a hole in the sky)			1	0	5.00	5.00
						Sub total:	5.00
						Total Due:	5.00

Pay amount Write off all Pay selected Cancel

You will get one chance to catch your mistake and cancel...

Write off an individual fine

Hide/Unhide \$0.00 balances Filter: Clear

Description	Account type	Notify id	Level	Amount	Amount outstanding
	F	1	0	5.00	5.00
Total amount to be written off:					5.00

Write off this charge Cancel

But if you click Write off this charge button without a note it results in the following on patron's record:

Date	Description of charges	Note	Amount	Outstanding	Print
08/06/2014	Fine , F 593610 View item The ranger, the cook and a hole in the sky	overdue fine for testing	5.00	0.00	Print
08/06/2014	Writeoff , Writeoff View item The ranger, the cook and a hole in the sky		5.00	0.00	Print

Now you must take corrective action...

Use the Add note tab.

Account Pay fines Create manual invoice **Add note**

Add note to patron fines record

Description:

Note:

Add note Cancel

Description line: Short description of action-include item title here

Note: You can write a very long explanation here if need be. Make sure the information is thorough enough for staff member at another library to understand what was done, why it was done, more info regarding item and WHO wrote the note. Initials and Branch 3 letter code at least. The date will be automatically included.

Add note to patron fines record

Description: Write off of The ranger, the cook and a hole in the sky

Note: Be sure to sign at least with your initials and branch code.

Add note Cancel

You will see this...

Hide/Unhide \$0.00 balances Filter: Clear

Date	Description of charges	Note	Amount	Outstanding
08/06/2014	C, Write off of The ranger, the cook and a hole in the sky	This item was written off in order to help teach our staff how to use this note line. You need to be thorough with explanation here. Imagine an archeologist reading this years later. Would they be able to understand what happened or why? Would they have a guess about WHO wrote this off? Be sure to sign at least with your initials and branch code.	0.00	0.00
08/06/2014	Fine , F 593610 View item The ranger, the cook and a hole in the sky	overdue fine for testing	5.00	0.00

Easy Peasy!