

Creating a Manual Invoice & Using *Add note* tab

Create a manual invoice to bill a patron, or to remove a credit balance that shouldn't be there.
Koha > Patron's record > Fines > Create Manual Invoice

Type - Use the pull-down menu to select the type of invoice.

Barcode – You may or may not enter the b/c. If you do, the item's biblio number and a "View item" link will be included in the Description area of the patron's fine info.

Here's a clip from the patron's fines. The highlighted portion is what appears if the barcode is entered in the **Barcode** field.

Date	Description of charges
05/30/2013	This is the text I entered in the Description field 777253 View item A revelation in autumn /

Description - Your selection from the "Type" pull-down menu will appear in the Description field (either in full or abbreviated form, depending on what you select). You may add to or replace this.

TIP - If you want any information to stay with the patron record, it must be entered in the **Note** field.

Include in the Note field:

- Your branch & the reason for the invoice,
- Title/Author/Barcode
- Any other descriptive info
- Your initials/branch.

Date	Description of charges	Note	Amount	Outstanding
07/11/2012	Damaged item	LAP PARTIALLY DAMAGED ITEM - Absent Friends by Gilliam Linscott, 31853011385908, charge to replace torn cover. lc/LAP	5.00	5.00
07/11/2012	Item long overdue, assumed lost	LAP LOST ITEM REPLACEMENT. Arrowsmith by Sinclair Lewis lc/LAP	15.00	15.00

To **correct a credit balance that shouldn't be there**, create a manual invoice, with explanatory notes/initials/branch, i.e., *"Invoice to correct automatic refund for return of lost books previously pd for..."*

Adding a Note – Use the **Add note** tab to add an explanatory note when necessary.

Description field: Put a short blurb explaining the reason for the note. Note in the screen shot below where the Description field entry appears.

Examples: “Written off with permission – [item title]”
 “Written off to correct error – [item title]”
 “Error in dealing with patron fine – [item title]”

Note field: Do your explaining here. Include your initials/branch. The date is automatically recorded. Note in the screen shot below where the Note field entry appears.

This is how it will look. The top entry was done with **Add note**.

Date	Description of charges	Note	Amount	Outstanding	Print
02/26/2014	Written off - God of Small Things	This item was found on-shelf. lc/KAM	0.00	0.00	Print
02/26/2014	The god of small things 02/18/2014 23:59 View item The god of small things		6.00	0.00	Print
02/26/2014	Writeoff View item The god of small things		6.00	0.00	Print
Total due				0.00	