

# Credit User Account – Credit Account

The Credit User Account wizard is used to manually create (add) a credit or withdraw credit from a user's credit account. Using this wizard, you can deposit funds into a user's credit account, manually refund a previously paid bill, or manually withdraw funds from the account for other library-defined reasons. This MAY or MAY NOT be turned on in your library – check with your ITC provider if you have questions.

👸 Credit User Account

- 1. Click on Credit User Account Wizard.
- 2. Enter the User ID.

**NOTE:** If your checkout properties helper is set to "Start with search helper", your user search screen will display first.

Start with search helper

pg 1

- 3. If configured in the wizard properties, the complete transaction history for the user displays under Credit Transactions Account.
- 4. *Enter* the amount in the amount field to create a credit, use x.xx format.
- 5. Select the credit payment type from the Payment Type list.
- 6. Select the reason for issuing the Credit from the Credit Reason list.

Credit User Account							- 9
Ճ₽₽							
⊂User Informati	on						
Photo Not On File	Na Pr Lii Us Ho	ame: ofile name: brary: ser categories omeroom:	Campbell, GRET STUDENT3 DLFN : <u>Y</u> 1A-SUEVER	A Status: Amount owed: Available hold Overdues: Privilege expi	BLOCKED \$1.00 s: 0 1 res: 6/30/2018		
dentify liser							
Identity 05er							
User ID: 22612	00180320	0					
Balance: Date created: Date last update	\$30.00 6/25/20 ed: 6/25/20	08,13:09 08,13:09					
Amount:	<mark>4</mark> ⊧	0.00					
Payment type:	CASH	(5)	~				
Credit reason:	DEPOSIT		6 🖌 👻				
Credit Transad	tion Acco	unt	<u> </u>				
Credit balance	: \$30.00						
Date Created	« Title		ltem Id	Bill Reason	Credit Reason	Amount	
6/25/2008,1	3:09				DEPOSIT		\$30.00



**NOTE:** If you are creating a credit, and the user does not have an existing credit account in the database, the wizard will display a message indicating that the user does not currently have a credit account, and an account will be created automatically for the user. The initial balance for the user's credit account is 0.00. You can then continue to manually add credits to the user's account.

### Credit User Account – Manual Refund

The Manual Refund helper in the Credit User Account wizard is used to manually issue refunds for paid bills for users with credit accounts.

1. To issue a refund, use the Manual Refund helper.



- 2. **Select** the Select All check box if you wish to refund all paid bills.
- 3. Select the check box in the Refund column for the bill if you wish to refund a specific bill.

Credit User Account : Manual Refund							-	o ×
Paid bills:5(\$6.	50)							
2 Select All								
Refund	Title	ltem ID	Reas	Ow	Bill	Date		
3	Yellow boat	3261201	LOST	\$0.00	\$6.83	6/	25/20	008
	Famous peop	. 3261201	LOST	\$0.00	\$20.00	6/	25/20	800
	Exceptional	3261201	LOST	\$0.00	\$19.00	6/	25/20	800

**Note:** If a refund could not be made for a selected bill, a dialog box displays the reason the refund was denied. If a refund had been previously refunded, credit reason, payment type, amount, and refund date display.

4. *Click* OK. The refunded bill information is added to the list of refunds posted under Credit Transaction Account.

Photo Not On File	Name: Profile name Library: User catego Homeroom:	Campbell, GRETA e: STUDENT3 DLFN ries: <u>Y</u> 1A-SUEVER	Status: Amount owed: Available holds: Overdues: Privilege expires	BLOCKED \$6.50 0 0 5: 6/30/2018	
Identify User					
User ID: 2261	2001803200				
Balance: Date created:	\$36.83 6/25/2008,13:09				
Date last updat	ed: 6/25/2008,13:55				
Date last updat Amount:	ed: 6/25/2008,13:55 \$0.00				
Date last updat Amount: Payment type:	ed: 6/25/2008,13:55 \$0.00 NONE	~			
Date last updat Amount: Payment type: Credit reason:	ed: 6/25/2008,13:55 \$0.00 NONE AUTOREFUND	×			
Date last updat Amount: Payment type: Credit reason: Credit Trans Credit ba	ed: 6/25/2008,13:55 \$0.00 NONE AUTOREFUND ction Account : \$36.83	v v			
Date last updat Amount: Payment type: Credit reason: Credit Tradit Credit bad Date Created	ed: 6/25/2008,13:55 \$0.00 NONE AUTOREFUND ction Account b: \$36.83 d « Title	V V	iill Reason Cr	edit Reason	Amount

pg 2



# Credit User Account - Manual withdrawal of funds

1. Click the Manual Withdrawal helper to manually withdraw funds.



pg 3

Credit User Account : M	anual Withdrawal – 🗆	×
User ID: 226120	01803200	
Credit balance Date created: Date last upda	e: \$31.83 6/25/2008,13:09 ated: 6/25/2008,14:02	
Amount:	\$0.00 2	
Payment type:	CASH 3	
Credit reason:		
With	draw Funds ( <u>o</u> ) <u>C</u> lose Account Cancel ( <u>b</u> )	

- 2. *Enter* the amount of funds to be withdrawn from the credit account in the amount field, use x.xx format.
- 3. Select the form of withdrawal payment (for example, CASH) in the Payment Type field.
- 4. Select the reason for the withdrawal In the Credit Reason field,
- 5. *Click* Withdraw funds.



# Credit User Account – Close Account \*\*CAUTION – Credit User Account CANNOT be recreated once closed

#### If NO balance:

- 1. Select manual withdrawal helper.
- 2. Click Close

Account.	Credit balance Date created: Date last upda	*: \$0.00 7/15/2009,15:43 ated: 7/15/2009,15:43	
redit User Account	Amount: Payment type: Credit reason:	\$0.00 CASH AUTOPAY	
Manual withdrawal The credit account had been closed succ	cessfully.	ithdraw Funds (o)	2 Se Account Cancel (b)

User ID: 22612001710801

Credit balance: \$19.00

Date last updated: 7/16/2009,7:50

AUTOPAY

LIBREFUND

(Withdraw Funds (o)

User ID: 2261200000139

Credit balance: Date created

Date last up

WF Manual withdrawal

Credit User Account : Manual Withdrawal

PAYMENT

Date created:

Payment type: CASH Credit reason: CLOSEACCT

Amount:

7/16/2009,7:45

\$19.00

2

3

\$19.00

The credit account had been closed successfully.

Withdraw Funds (o)

ОК

Close Account

WF Credit User Account : Confirmation

Cancel (b)

The credit account balance is now:\$0.00

Close Account

ne account?

×

X

Cancel (b)

User ID: 22612001813357

### If balance remains:

- 1. Select manual withdrawal helper.
- 2. Enter balance to withdraw and credit reason.
- 3. Click Withdraw Funds.

Last Updated Summer 2018

4. Do you want to close the account? Click "Yes"

	Circulation – Circulation	pg 4	
yout created and text abridged by INFOhio fro			
INFOhio is Optimized by the Management Co	incil		

Page la docume



pg 5

Note: For more detailed information or specific questions, use HELP wizard.