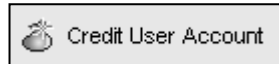


Credit User Account – Credit Account

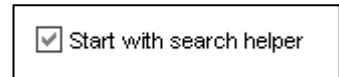
The Credit User Account wizard is used to manually create (add) a credit or withdraw credit from a user's credit account. Using this wizard, you can deposit funds into a user's credit account, manually refund a previously paid bill, or manually withdraw funds from the account for other library-defined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

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.



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.



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.



- To issue a refund, use the Manual Refund helper.
- Select** the Select All check box if you wish to refund all paid bills.
- Select** the check box in the Refund column for the bill if you wish to refund a specific bill.

Credit User Account : Manual Refund

Paid bills:5(\$6.50)

Select All

Refund	Title	Item ID	Reas...	Ow...	Bill...	Date
<input type="checkbox"/>	Yellow boat	3261201...	LOST	\$0.00	\$6.83	6/25/2008
<input type="checkbox"/>	Famous peop...	3261201...	LOST	\$0.00	\$20.00	6/25/2008
<input type="checkbox"/>	Exceptional ...	3261201...	LOST	\$0.00	\$19.00	6/25/2008

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.

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

Credit User Account

User Information

Name: **Campbell, GRETA** Status: **BLOCKED**
 Profile name: **STUDENT3...** Amount owed: **\$6.50**
 Library: **DLFN** Available holds: **0**
 User categories: **Y** Overdues: **0**
 Homeroom: **1A-SUEVER** Privilege expires: **6/30/2018**

Identify User

User ID: **22612001803200**

Balance: **\$36.83**
 Date created: **6/25/2008,13:09**
 Date last updated: **6/25/2008,13:55**

Amount: **\$0.00**
 Payment type: **NONE**
 Credit reason: **AUTOREFUND**

Credit Transaction Account

Credit balance: **\$36.83**

Date Created	Title	Item Id	Bill Reason	Credit Reason	Amount
6/25/2008,13:55	Exceptional wo...	32612010115586	LOST	AUTOREFUND	\$19.00

Credit User Account – Manual withdrawal of funds

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



Credit User Account : Manual Withdrawal

User ID: 22612001803200

Credit balance: \$31.83
Date created: 6/25/2008,13:09
Date last updated: 6/25/2008,14:02

Amount: 2

Payment type: 3

Credit reason: 4

5

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.

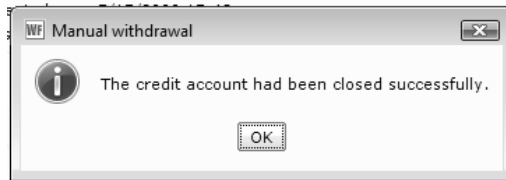
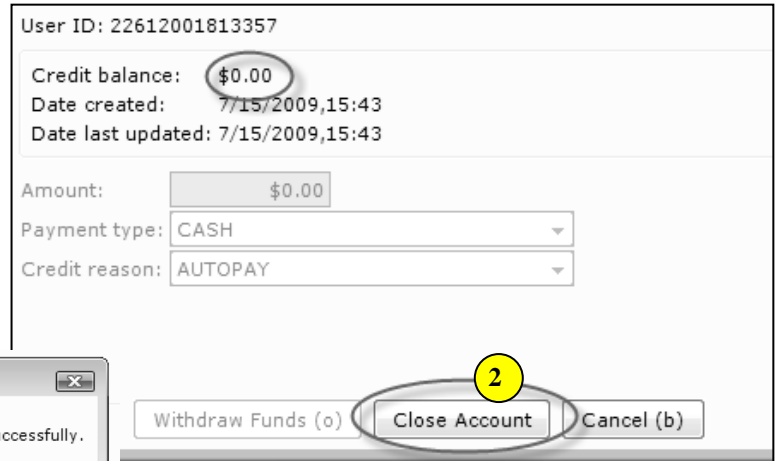


Credit User Account – Close Account

****CAUTION – Credit User Account CANNOT be recreated once closed**

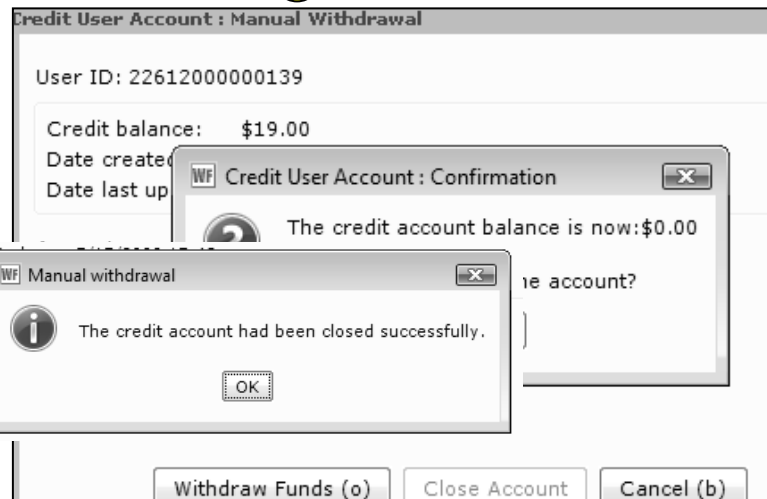
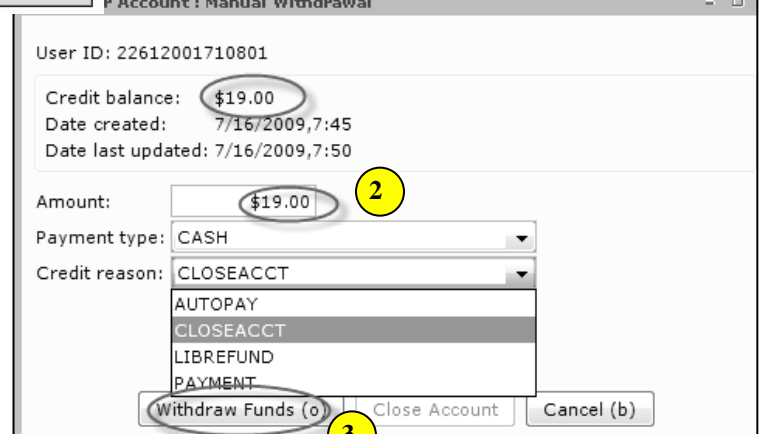
If NO balance:

1. **Select** manual withdrawal helper.
2. **Click** Close Account.



If balance remains:

1. **Select** manual withdrawal helper.
2. **Enter** balance to withdraw and credit reason.
3. **Click** Withdraw Funds.
4. **Do you want to close the account? Click** "Yes"



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