


Receipt Configuration – Pay Bills Slips

Revision Date: June 2017

If your library has receipt printers, a receipt will need to be configured for each type of receipt you use in each wizard. There is no one receipt configuration that carries through to the same type of receipt in the next wizard.

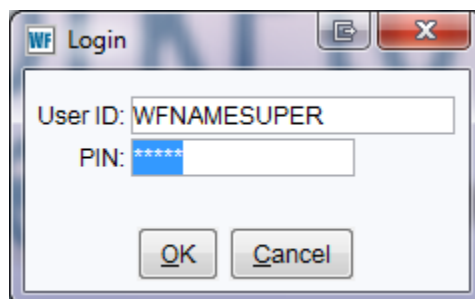
- ❖ These wizards contain the Pay Bills helper  used to configured paying bill receipts.
 - Checkout
 - Discharge
 - Fine Free Discharge
 - Renew User
 - Renew Item
 - Display User
 - Place Holds
 - Place Research Holds
 - Ephemeral

- ❖ These wizards contain a property (Print slip showing payments) used to configure printing receipts. They do not contain the Pay Bills helper.
 - Billing a User
 - Paying Bills

Receipts are configured by logging into WorkFlows using the supervisor login.

Log into WorkFlows using the Supervisor login:

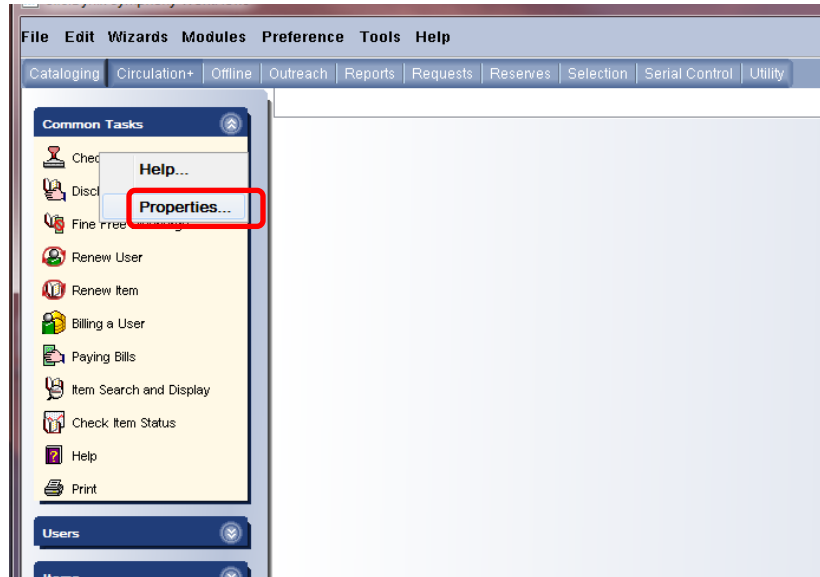
- Enter your WorkFlows library name followed by SUPER. The pin is also SUPER.
Example:



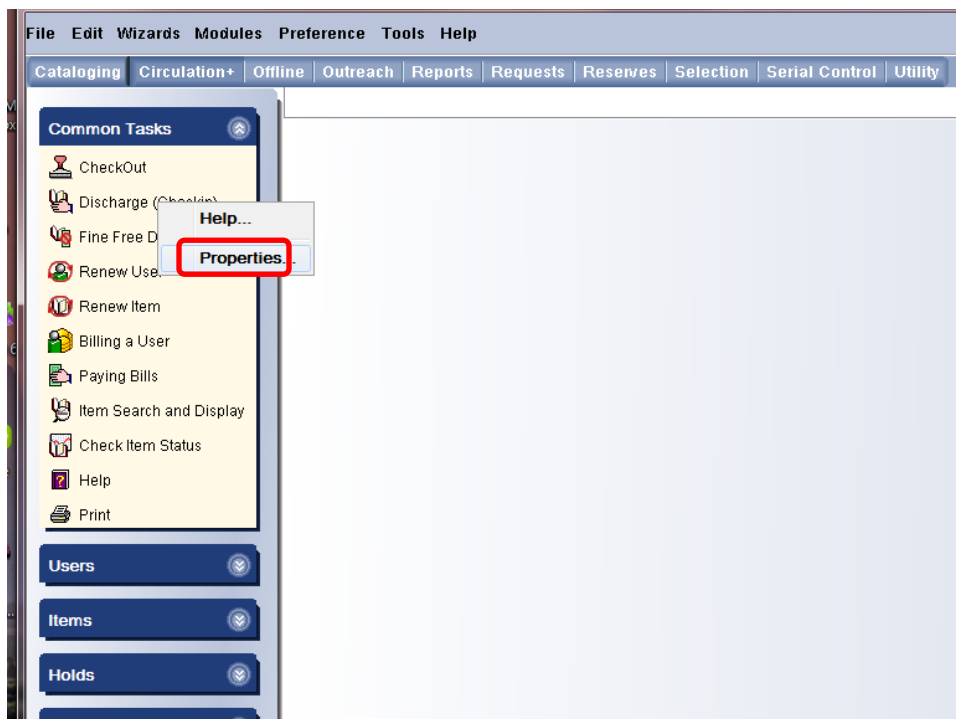
In the Circulation module:

- Place the cursor on the name of the circulation wizard that contains the receipt to be configured and right click.
- Select Properties from the drop down menu.

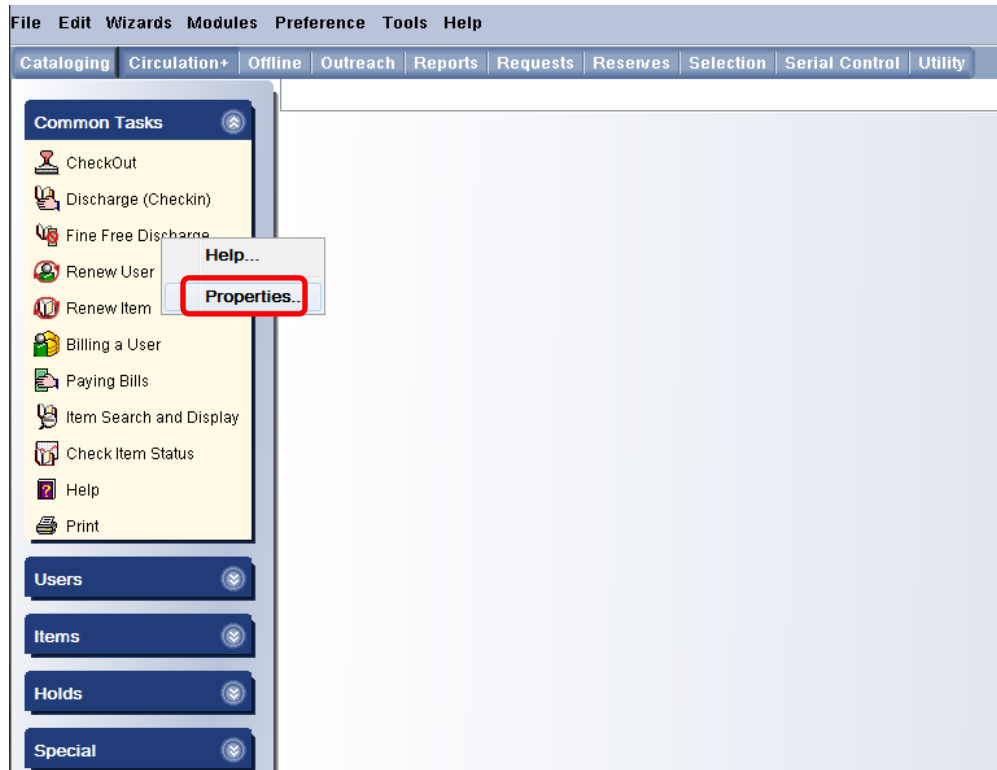
CheckOut Wizard:



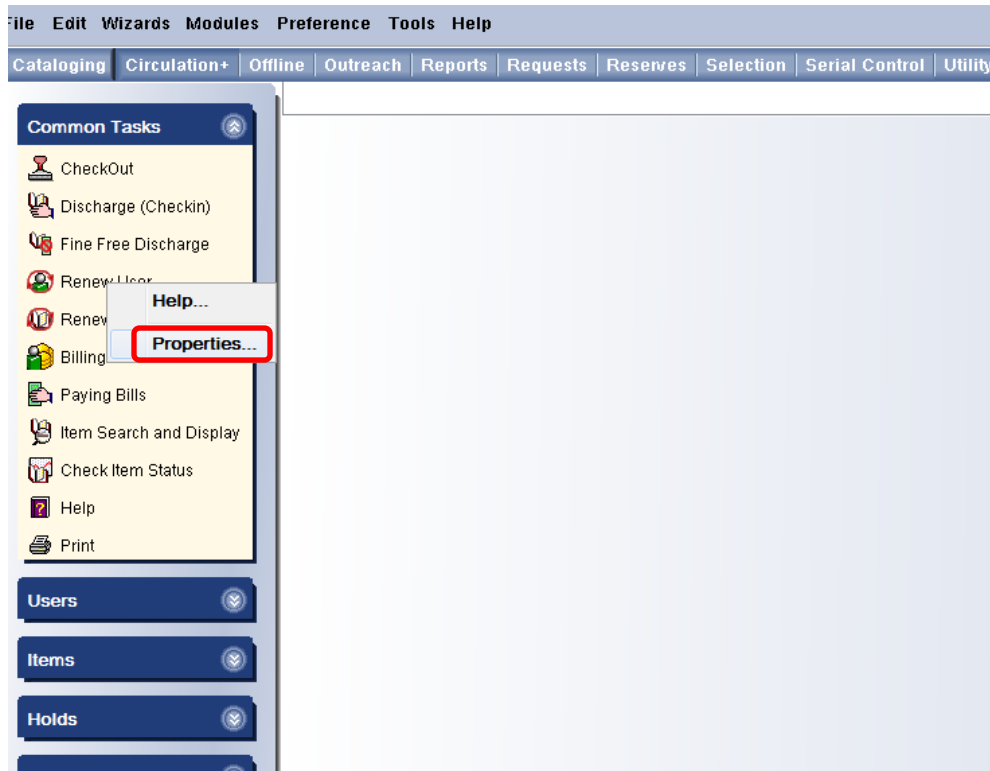
Discharge Wizard:



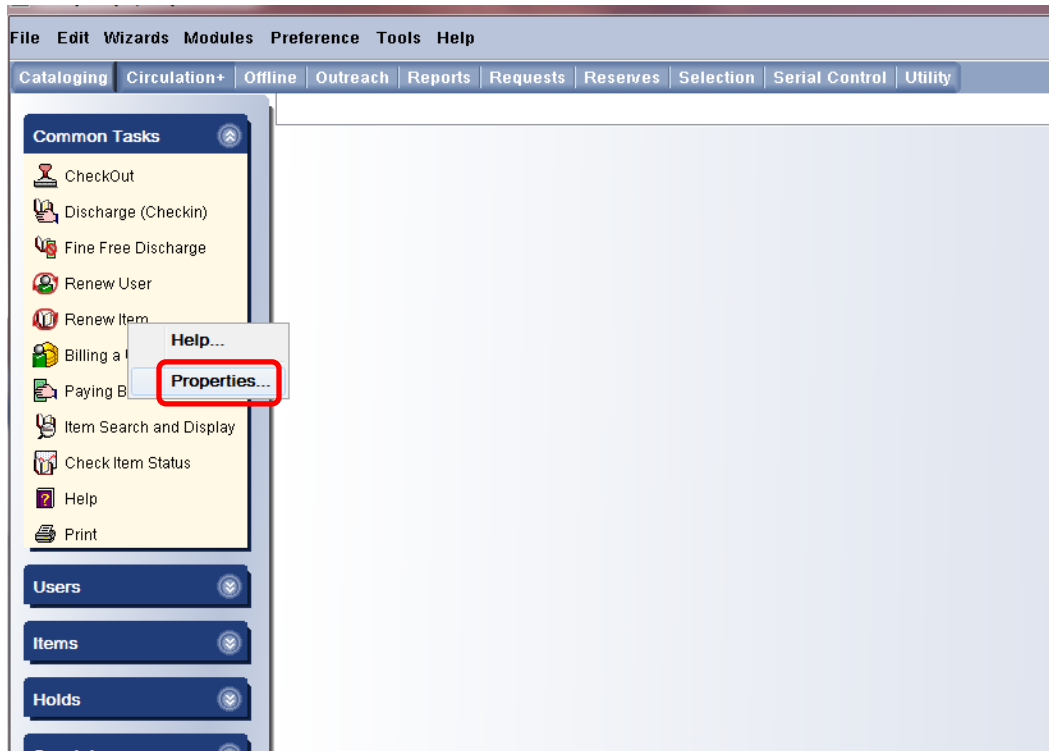
Fine Free Discharge Wizard:



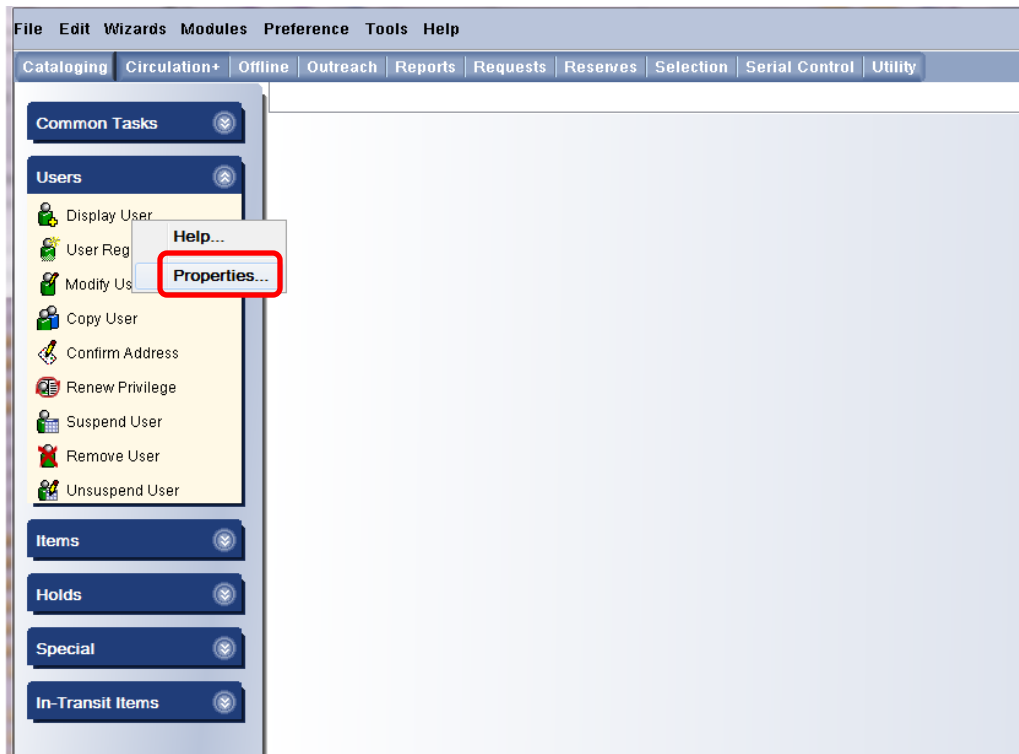
Renew User Wizard:



Renew Item Wizard:



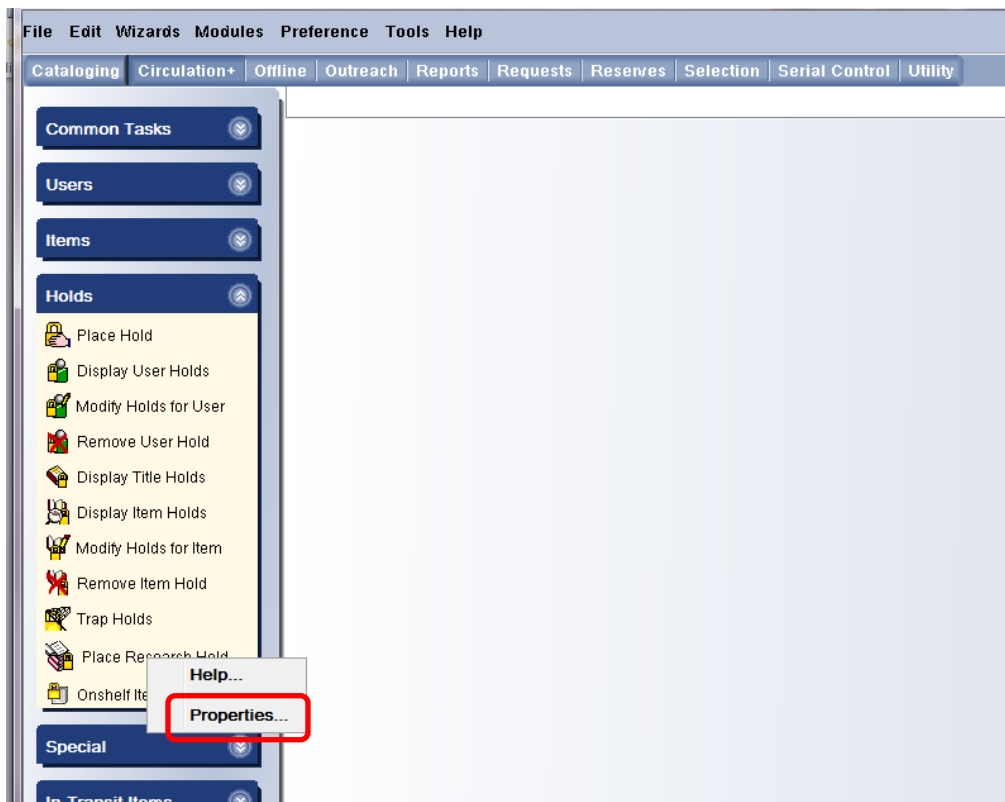
Display User Wizard:



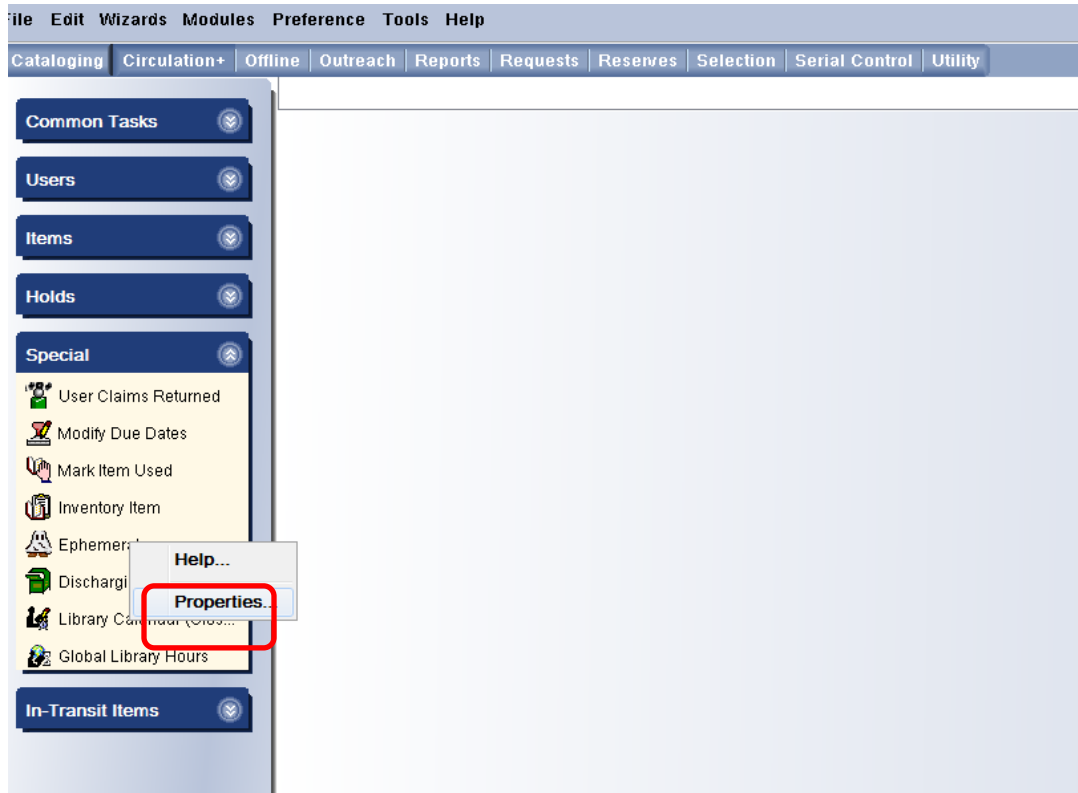
Place Holds Wizard:



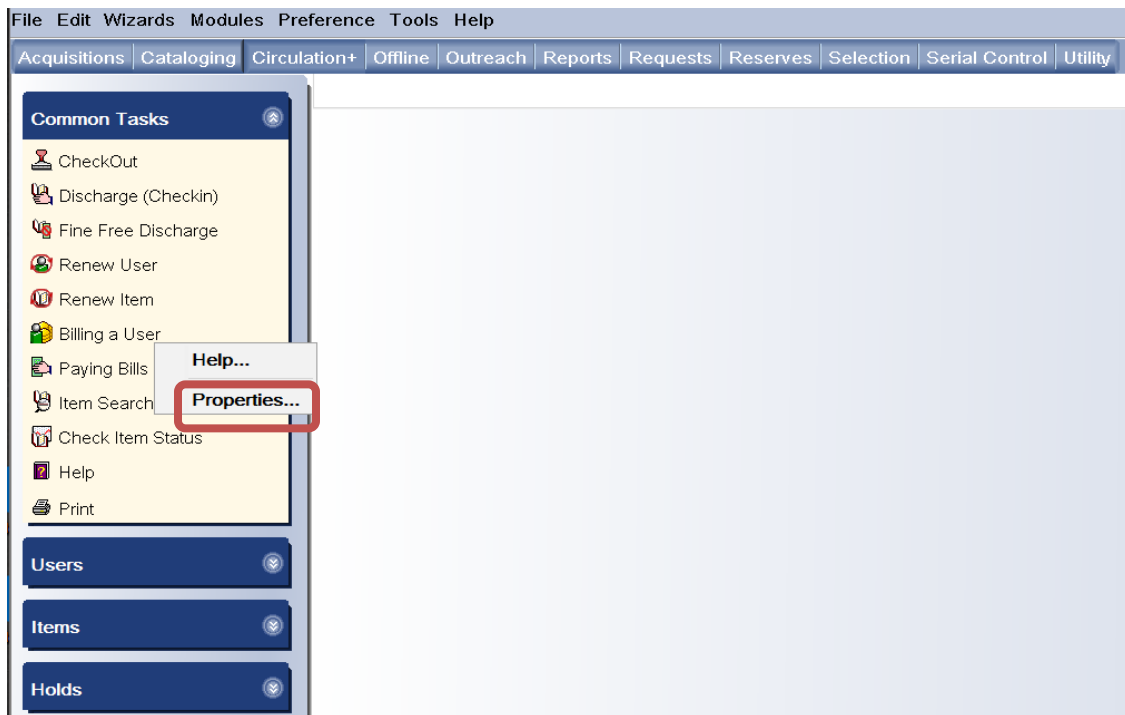
Place Research Hold Wizard:



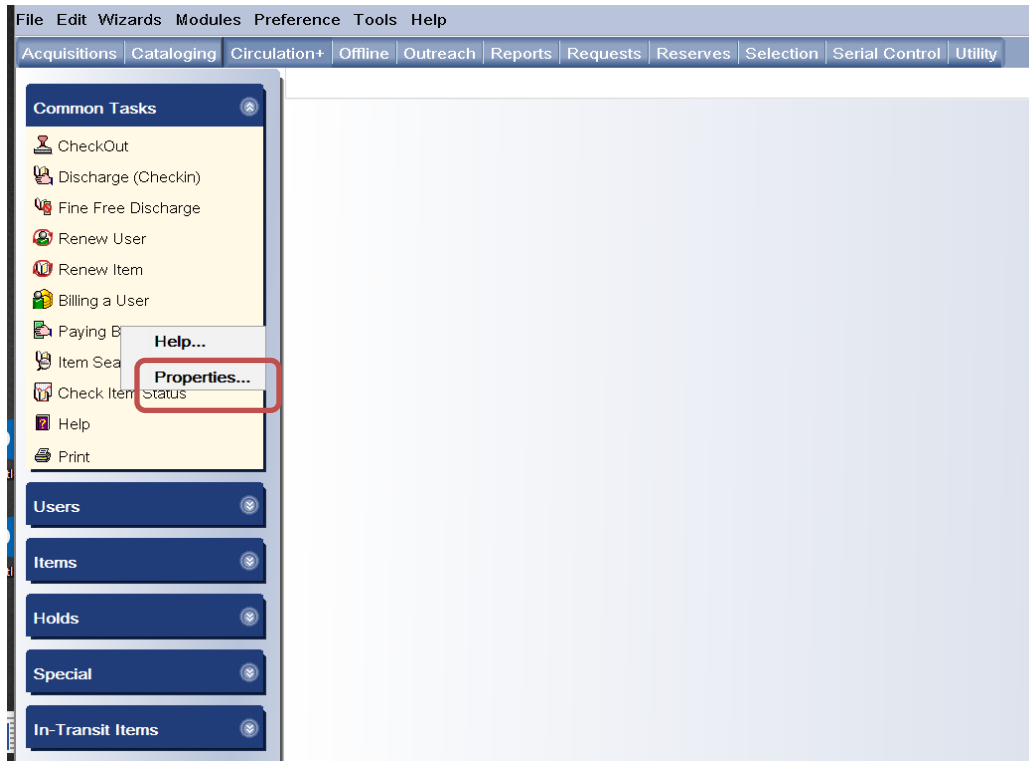
Ephemeral Wizard:



Billing a user Wizard:



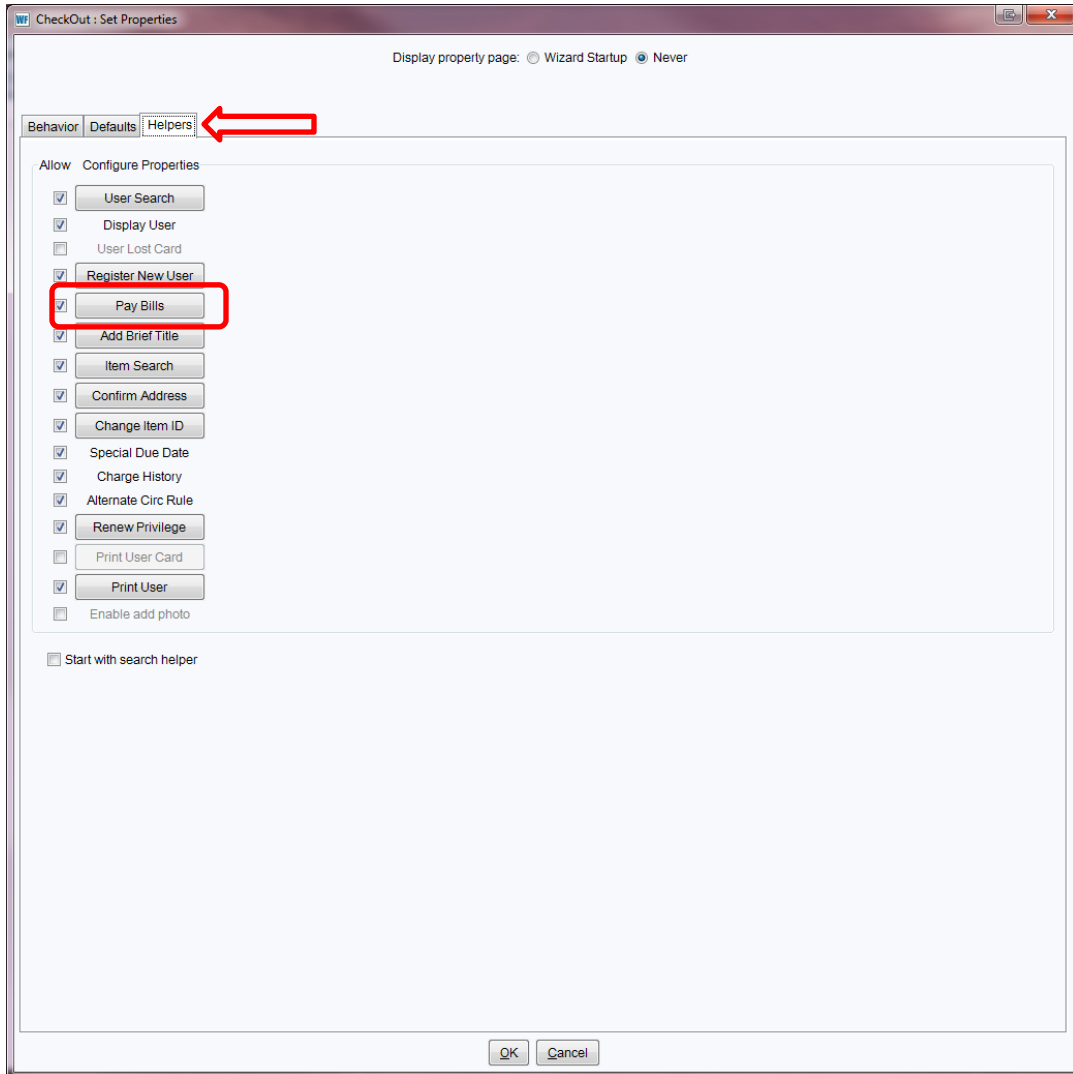
Paying Bills Wizard:



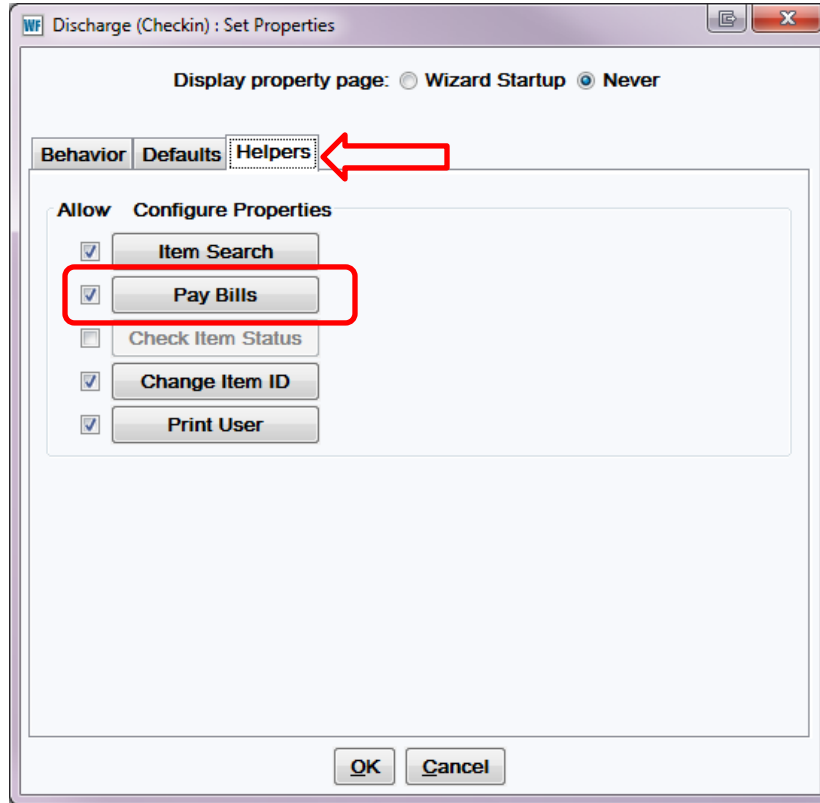
Receipt (Pay Bills):

- Select the Helpers tab in the Set Properties popup box.
- Click the check box in front of the of the Pay Bills button.
- Click the Pay Bills button to access the Pay bills: Set Properties popup box.

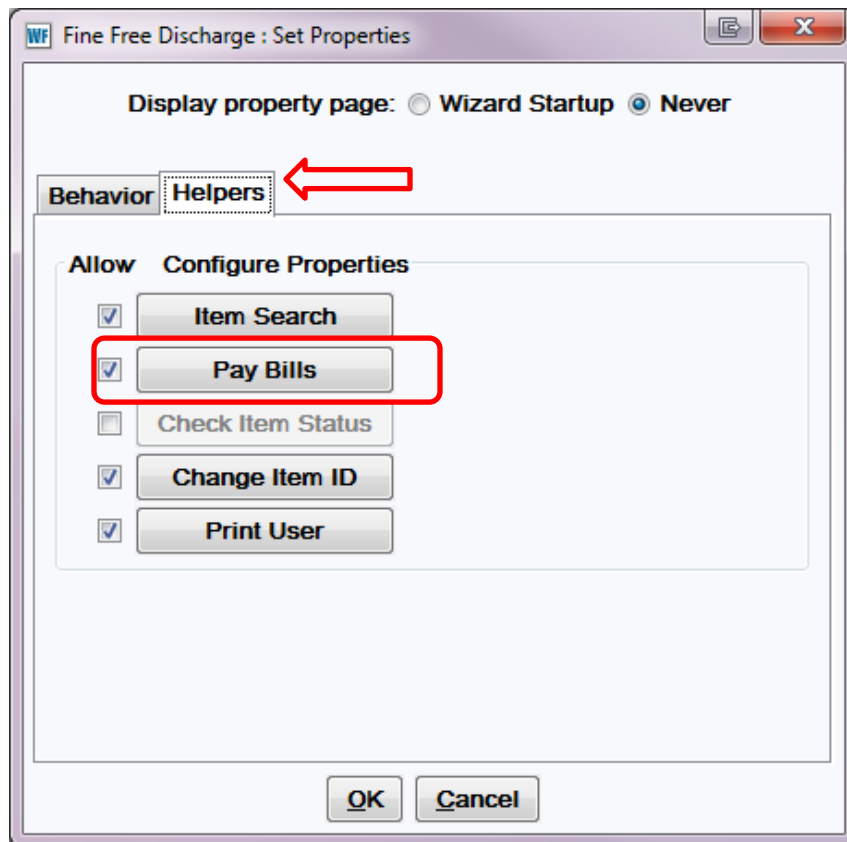
CheckOut Wizard:



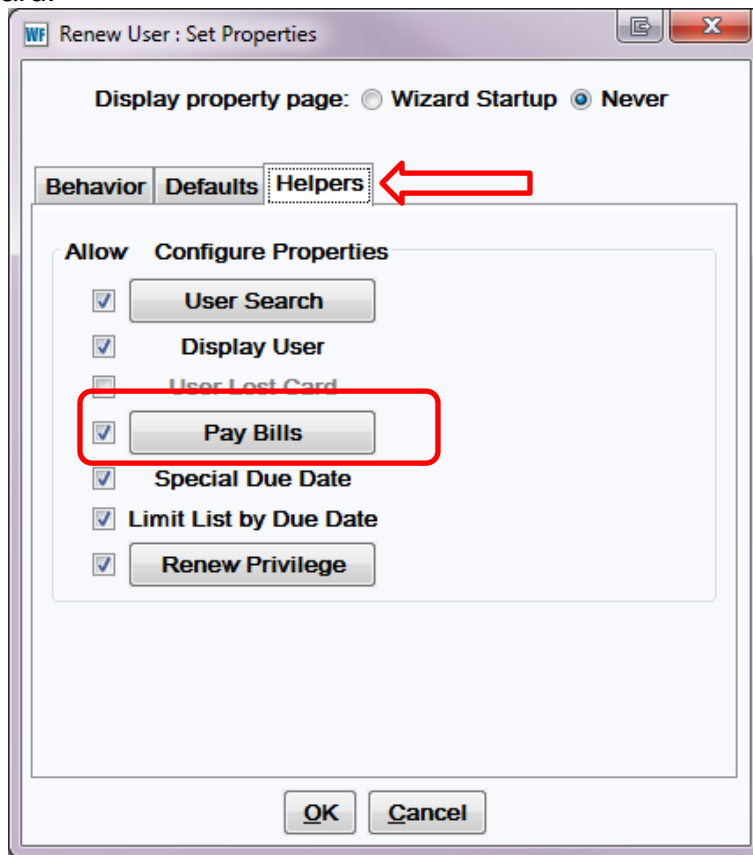
Discharge Wizard:



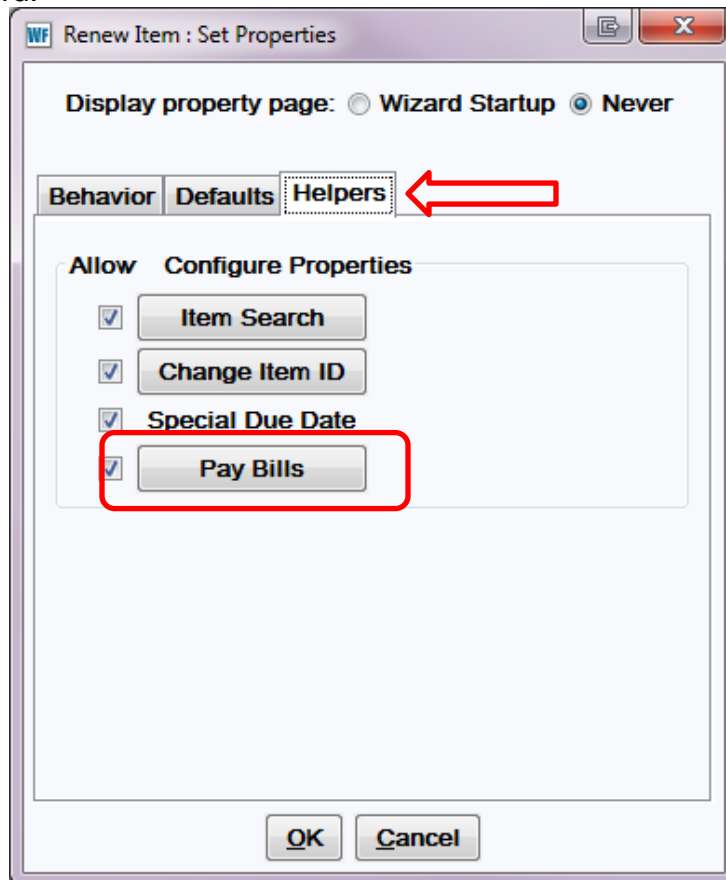
Fine Free Discharge:



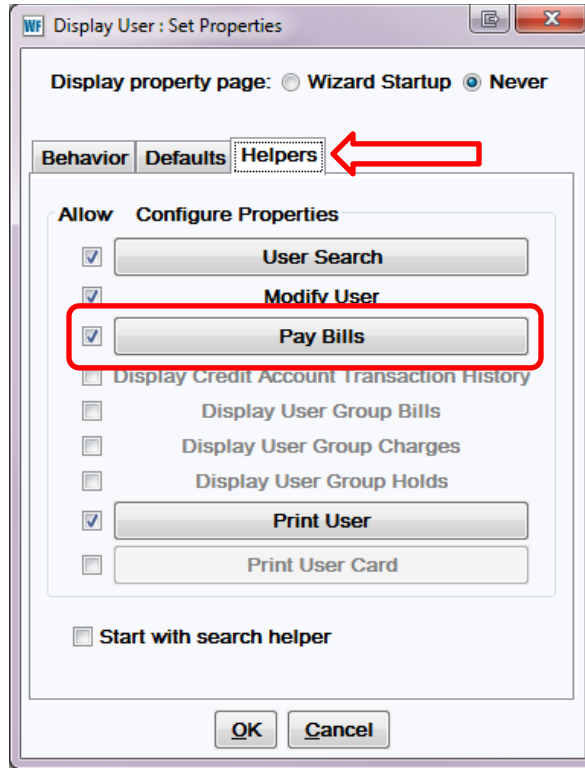
Renew User Wizard:



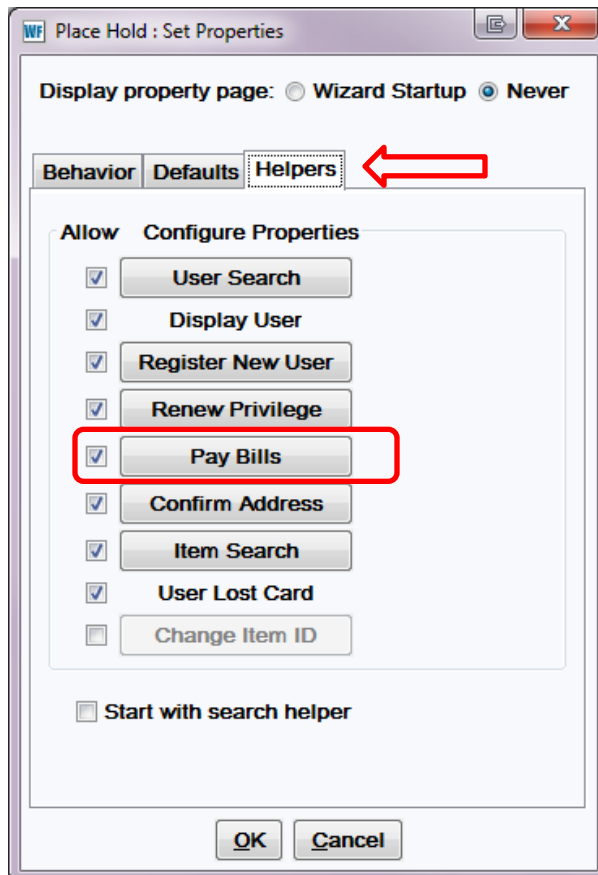
Renew Item Wizard:



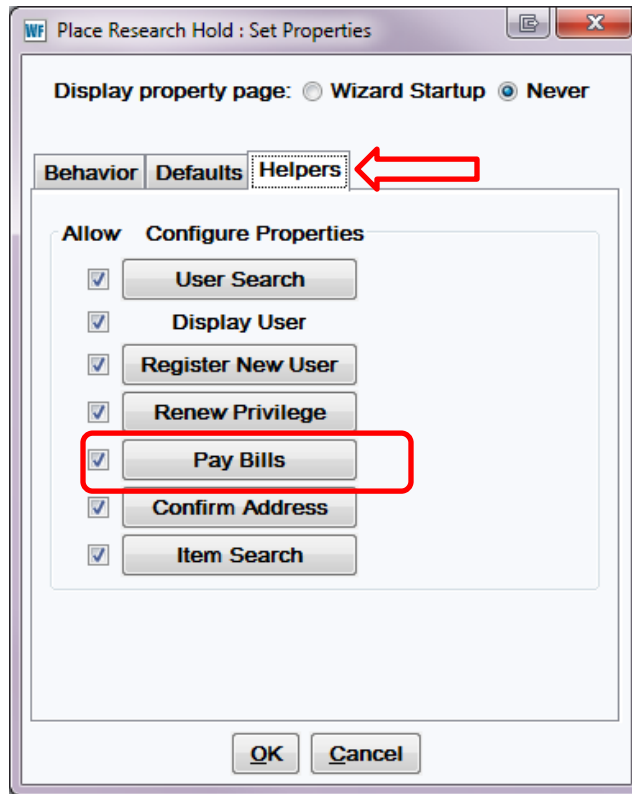
Display User Wizard:



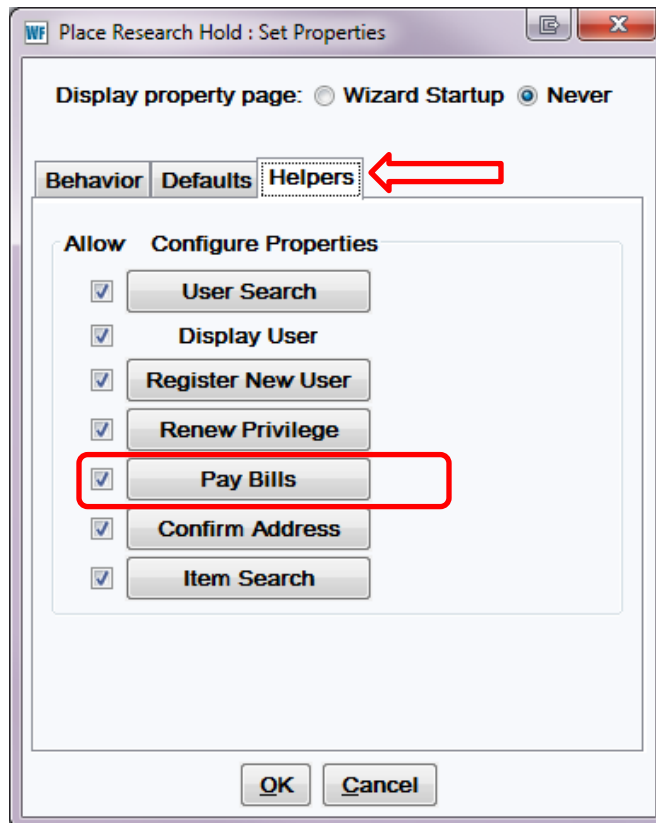
Place Holds Wizard:



Place Research Holds Wizard:



Ephemeral Wizard:



Billing a User Wizard: (Does not contain the Pays Bill helper)

WF Billing a User: Set Properties

Display property page: Wizard Startup Never

Behavior Defaults Helpers

- Hide current user
- Hide current item
- Bill User
- Pay Now
- Allow bills to be forgiven/cancelled

Allow Configure Properties

- Print slip showing payments

Payment types that open cash drawer

Payment type:

OK Cancel

Paying Bills Wizard: (Does not contain the Pays Bill helper)

WF Paying Bills: Set Properties

Display property page: Wizard Startup Never

Behavior Defaults Helpers

- Allow bills to be forgiven/cancelled

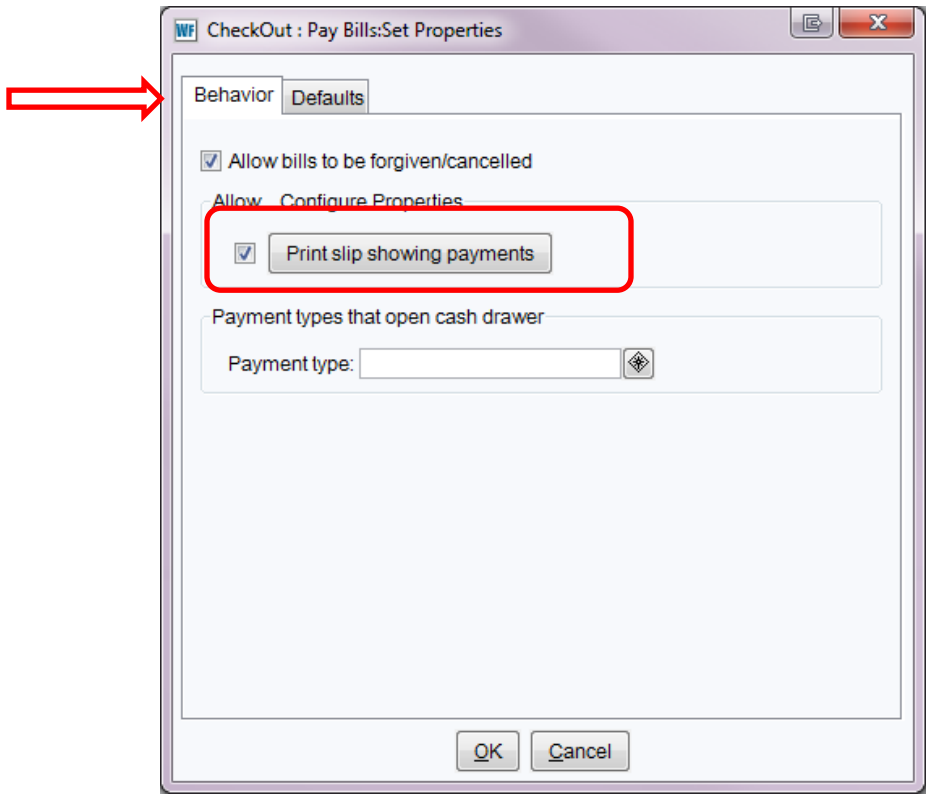
Allow Configure Properties

- Print slip showing payments

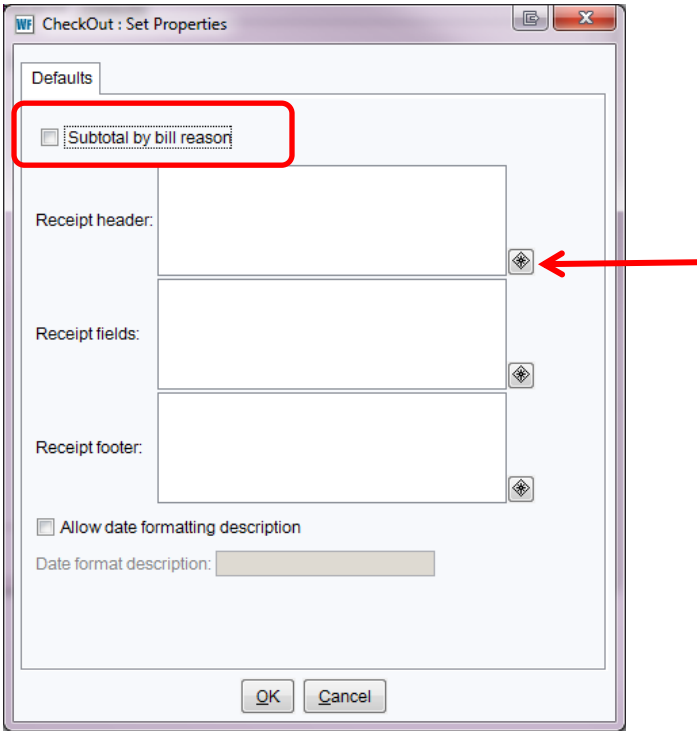
Payment types that open cash drawer

Payment type:

OK Cancel




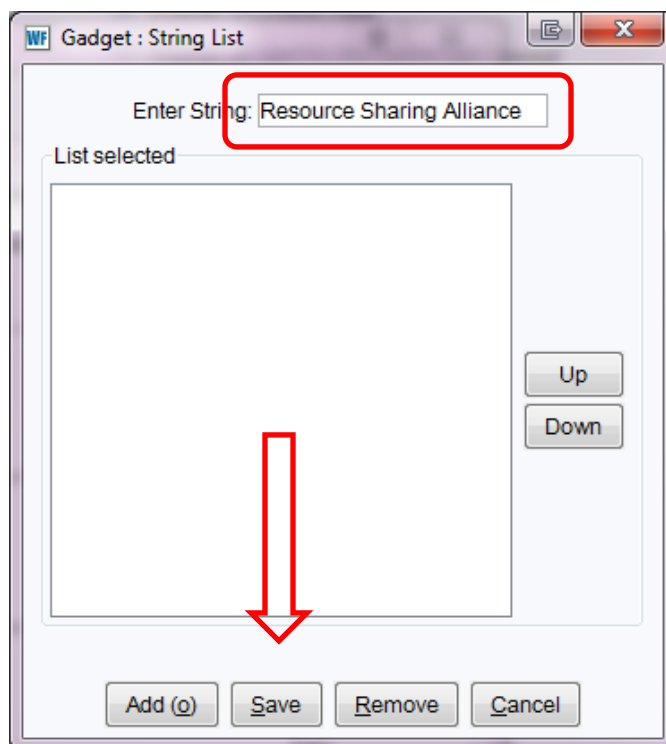
- Select the Behavior tab.
- Check the box in front of Print slips showing payments button on the Behavior tab.
- Click the Print slips showing payments button.



- (Optional): Check Subtotal by Bill Reason if you would like to include subtotals of fines paid by bill reason at the bottom of the receipt.

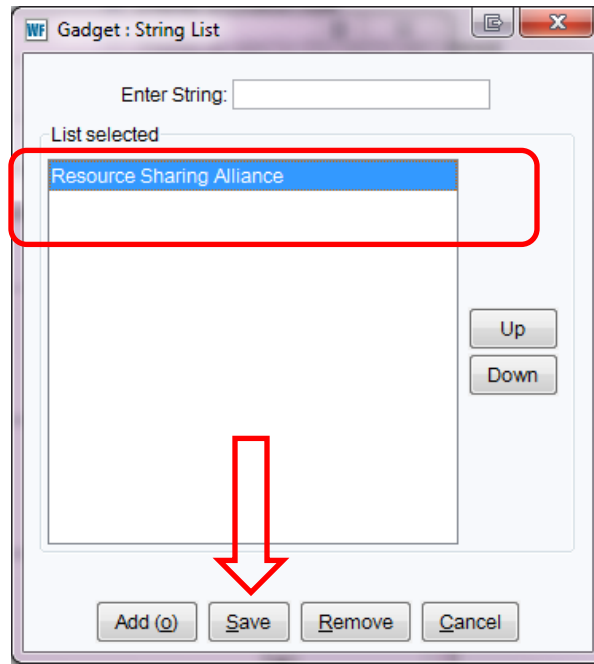
❖ Receipt Header:

- Click the gadget  to the right of the Receipt Header box to enter information that will appear on the top of the receipt. The most common entry is the library name.

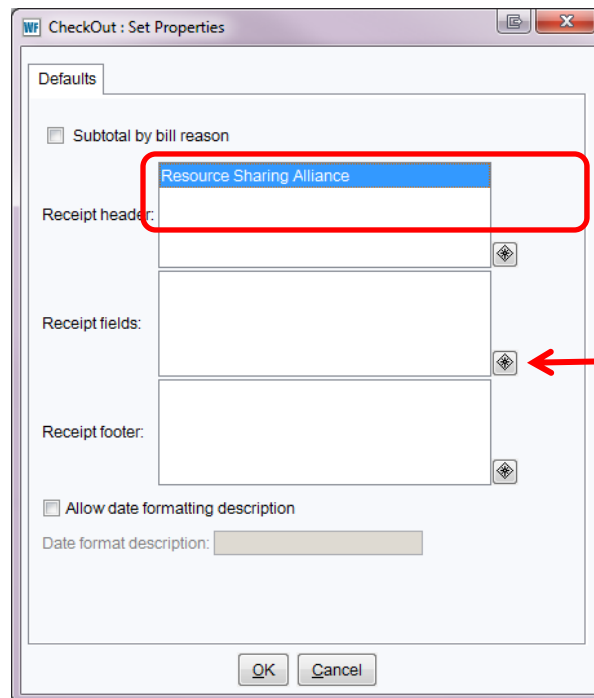


- Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box

There are a limited number of characters that can be entered in the Enter String box. The limit depends on the characters that you enter into the string. If your library name or other information is too long add the text and create an additional text string.




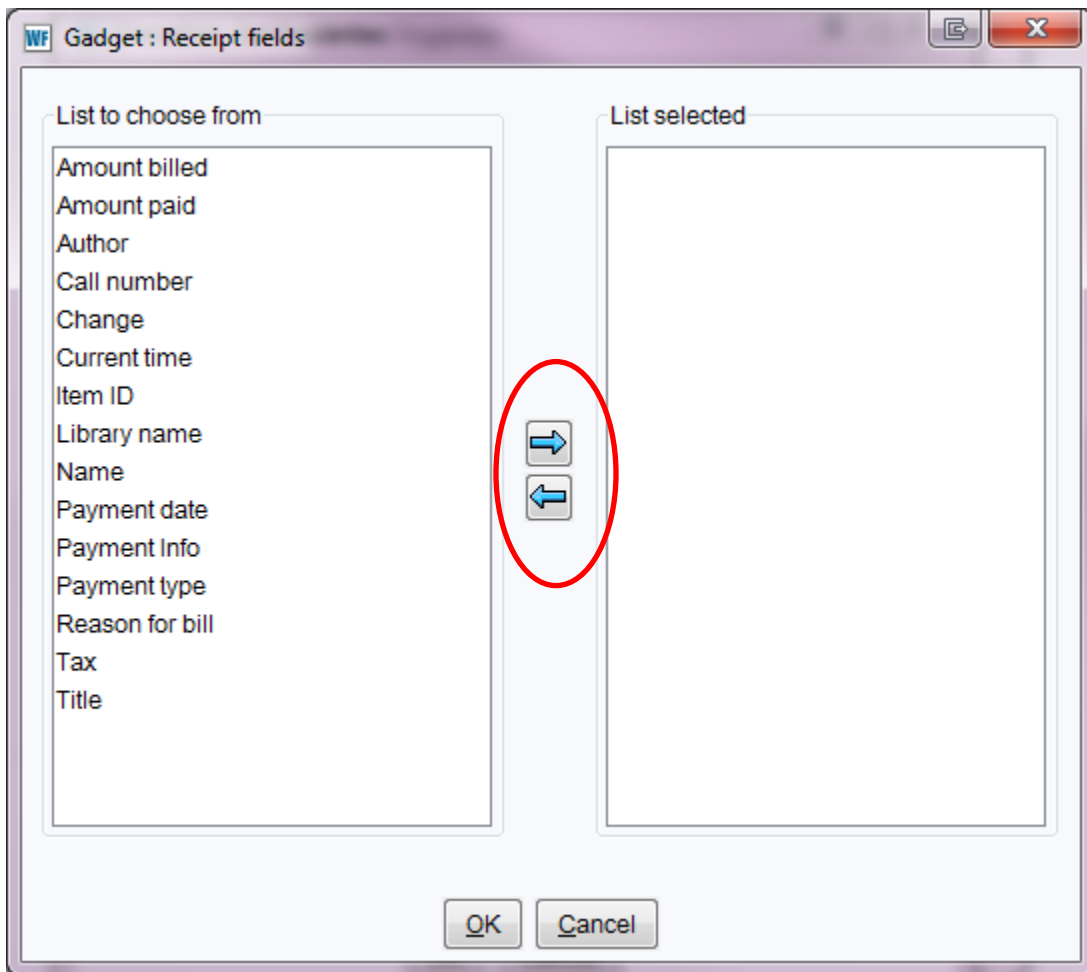
The information added to the Receipt Header will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button at the bottom of the Gadget: String List popup box.



The information added to the Receipt header will appear in the receipt header display box on the Set Properties popup box.

❖ Receipt fields

- Click the gadget  to the right of the Receipt fields display box to select the information that will be included on your receipt.

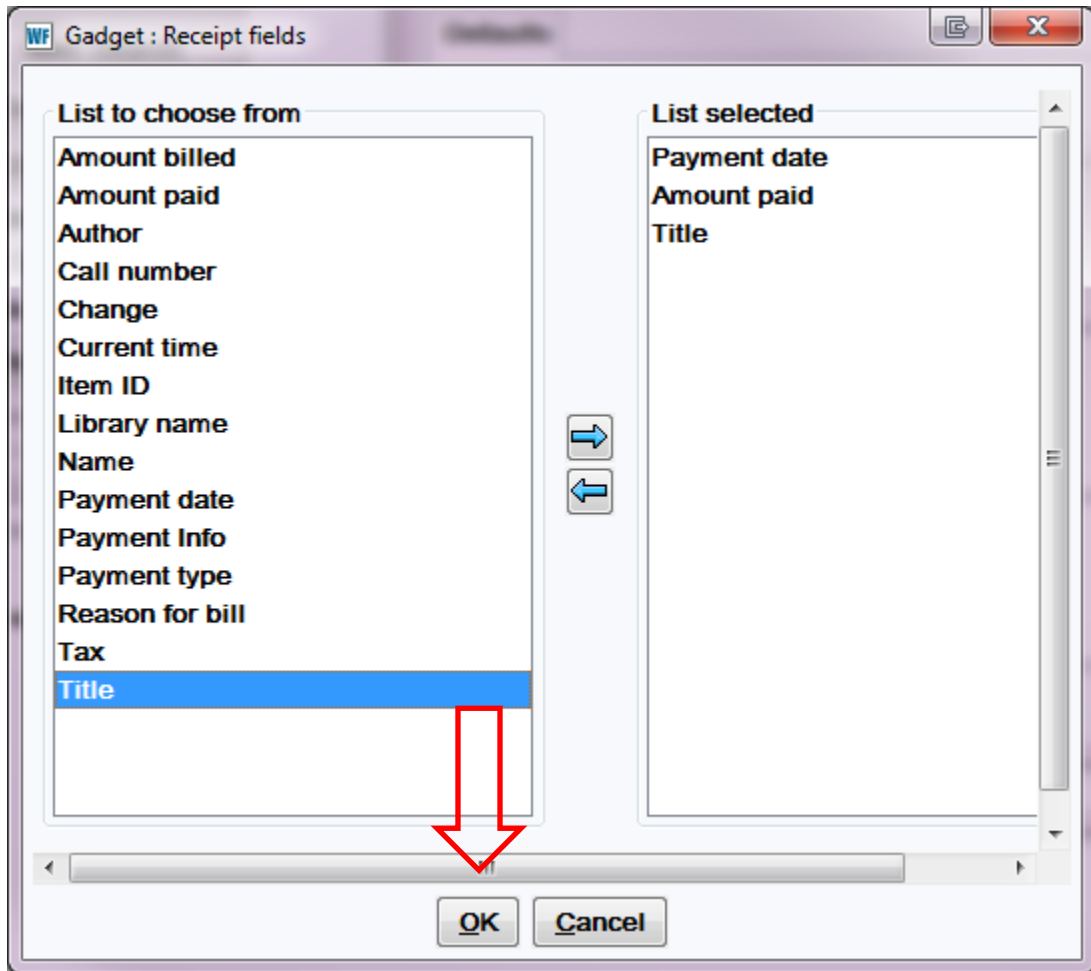


Using the arrows in the middle of the Gadget: receipt fields popup box move the information to be include on the receipt from the “List to choose selection” list on the left to the “List selected box” on the right.

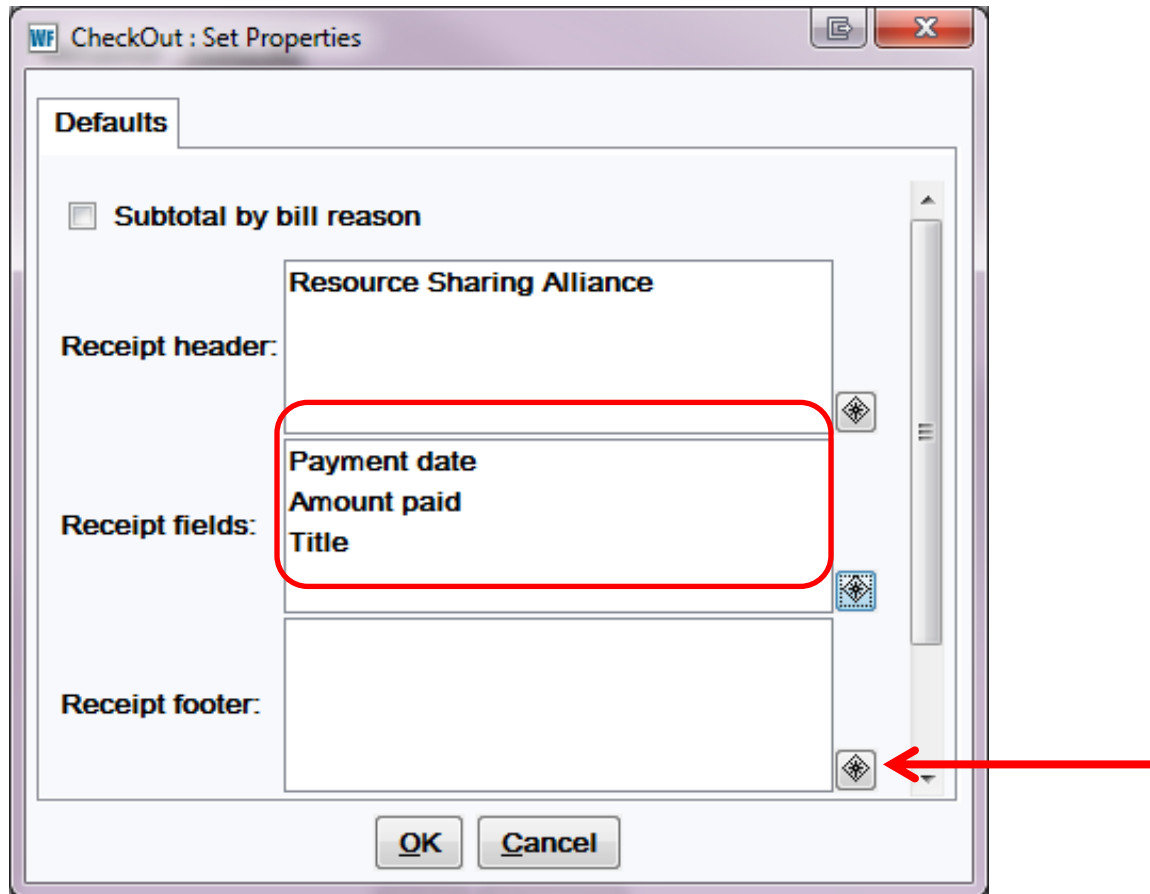
The suggested minimum information to include on the receipt is:

- Payment date
- Amount paid
- Title


You may select other information from the list to include on your receipt. Be sure to consider patron privacy when making your selections.

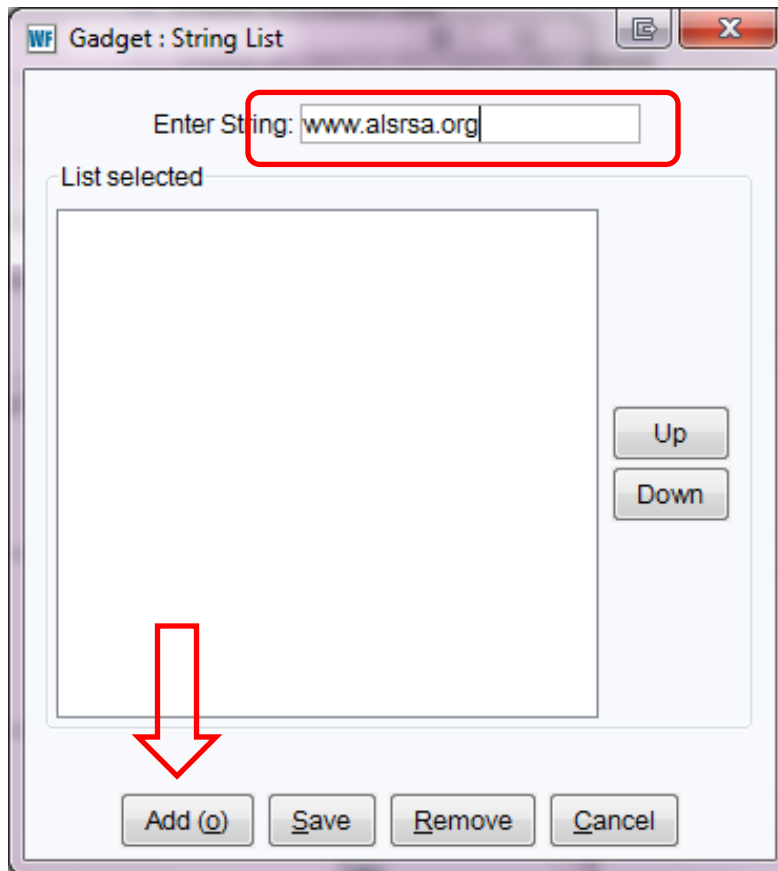


When finished selecting the Receipt field information, click the OK button.



The information added to the receipt fields will appear in the Receipt fields display box on the Set Properties popup box.

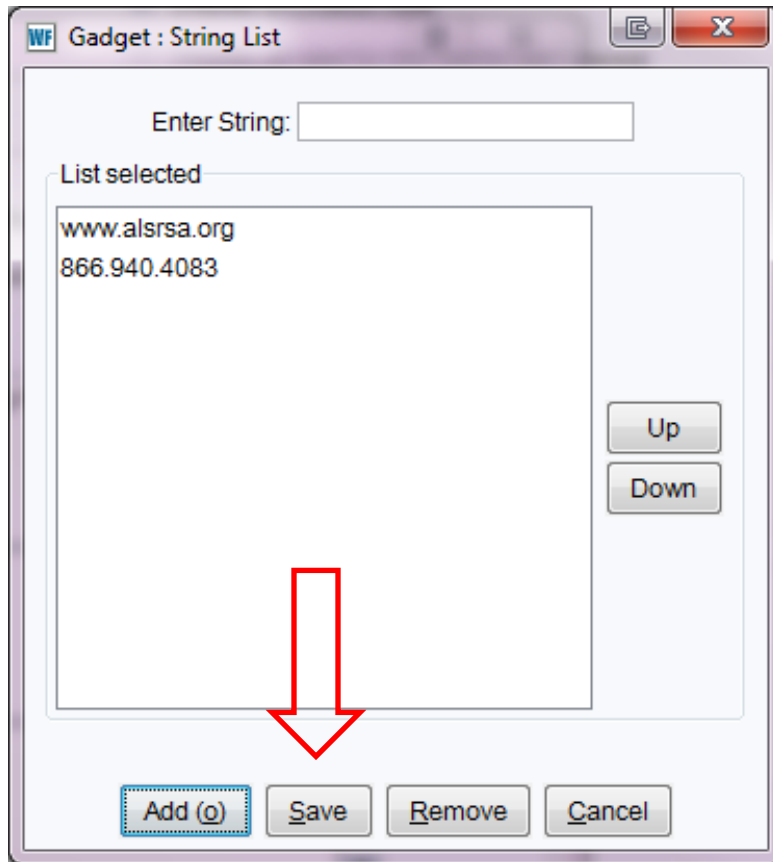
- ❖ Receipt Footer (Optional): *If you are not entering information into the receipt footer skip the receipt footer setup.*
- ❖ Click the gadget  to the right of the Receipt Footer box to enter information that will appear on the bottom of the receipt.



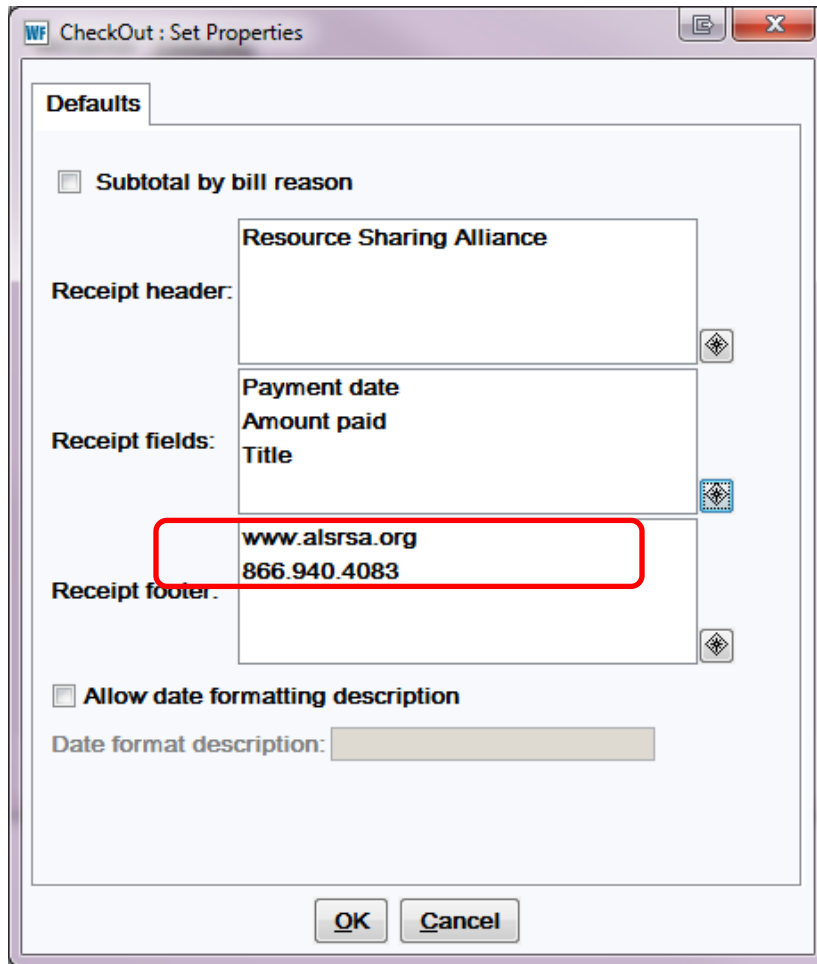
Enter the information into the Enter String box and click the Add button on the bottom of the Gadget: string List box.

Examples of information that could be added to the bottom of the receipt:

- Library website address
- Library telephone number
- Dates for story time registration
- Dates for the next book sale

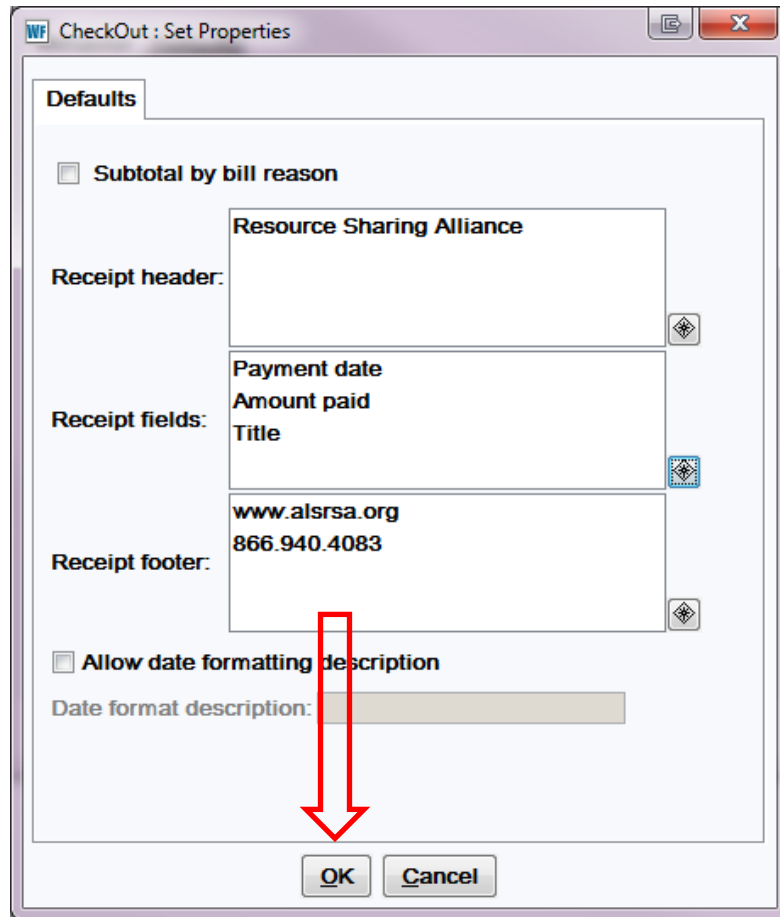


The information added to the Receipt Header will appear in the List Selected display box. When you have finished adding the receipt header information click the Save button on the bottom of the Gadget: String List popup box.



(Optional): Date formatting supplies text on the receipt to explain the date format your library uses

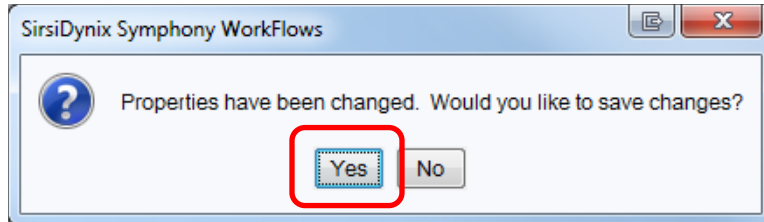
12/14/2015
Month/Day/Year



When you have finished configuring the Pay Bill receipt click the OK button on the bottom the CheckOut: Set Properties pop up box.

You must close the Supervisor session of WorkFlows to save the Pay Bill receipt configurations.

When you close this session of WorkFlows, you will receive the following popup box:



Click "Yes" to save the settings.

The Pay Bills receipts will be available next time you log into WorkFlows using the CIRC or your assigned cataloging login.

Do not forget to back up your Sirsi folder, which will now contain the receipt configuration. Instructions for backing up your Sirsi folder can be found on the RSA Support Site (www.rsanfp.com).

How to Back Up the Workflows Configuration Folder on Windows 7:
<http://alsrsa.org/client/search/asset/3503>

How to Back Up the WorkFlows Configuration Folder on Windows 10:
<http://alsrsa.org/client/search/asset/5683>

Staff can use the Sirsi folder to:

- Transfer settings from one computer to another
- Load configured settings onto a new computer

Instructions on replacing the Sirsi folder or transferring the folder to another computer can be found on the RSA Support site (www.rsanfp.com).

How to Replace the WorkFlows Configuration Folder on Windows 7:
<http://alsrsa.org/client/search/asset/4346>

How to Replace the WorkFlows Configuration Folder on Windows 10:
<http://alsrsa.org/client/search/asset/5684>

[Questions?? Contact Martha Troxell or Wendy Adams-Good at:](#)

[RSA Help Desk: rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info)

[RSA Toll Free: 866.940.4083](tel:866.940.4083)

[RSA Local: 309.740.3805](tel:309.740.3805)

martha.troxell@railslibraries.info

wendy.adams-good@railslibraries.info