



Billing a User Cheat Sheet

Last updated: June 13, 2025

There is a video which accompanies this cheat sheet here:

<https://www.youtube.com/watch?v=tWcRjJFlz8>.

The Billing a User wizard is used to add a bill to a user account. It is not used to bill a user for replacing a lost item. If an item is lost, let the item run through the overdue and billing cycle or use the Mark Item Lost wizard. Some reasons for adding a bill are partial damage, copies, etc.

1. Enter the user's ID in the "User ID:" box
2. In the Enter Item & Bill Information section:
 - a. Reason for bill: Select the most relevant bill reason. Contact RSA to customize this list.
 - b. Amount: Enter an amount.
 - c. Item ID:
 - i. If the Reason for the bill is associated with an item, this box must be filled in. If the item is scanned, it will automatically bill and complete the process.
 - ii. If the Reason for the bill is not associated with an item, the box is grayed out.
 - d. Payment type: If paying now, select payment type. Leave as cash if not paying now.
3. After entering the information:
 - a. If the patron is immediately paying the bill:
 - i. Click the Pay Now button on the bottom of the screen.
 - ii. The Bill Status will be PAID.
 - b. If the patron is not immediately paying the bill:
 - i. Click the Bill User button on the bottom of the screen.
 - ii. The Bill Status will be BILLED.

Resource Sharing Alliance

Billings Wizard

User Information
Name: NASLUND, RORY E **Status:** DELINQUENT Library: AG_ALS-PDC
Profile name: ADULT... **Amount owed:** \$2.50 Available holds: 0
User categories: Y **Overdues:** 0
Group ID: **Privilege expires:** 6/13/2027

Identify User
User ID: SNDEMO1
Street: 40 NAUGHTY CAT LN
City, state: MEOWINGTON IL
Zip: 48169
Phone: 309-435-5228
Email: CATNIPADDICT@KITTY.COM

Enter Item & Bill Information
Reason for bill:
Amount:
Item ID:
Note:
Payment type: CASH

List of Bills

Title	Item ID	Reason	Billed	Bill Status	Note
The hunger games	A66792716721	BARCODE		\$2.00 Billed	6.10.25 SN WASH/MAIN MISSL...
		BOOK-SALE		\$0.50 Paid	6.10.25 SN WASH/MAIN BOO...
		BOOK-SALE		\$0.50 Billed	6.10.25 SN WASH/MAIN BOO...

Get User Information Bill User Pay Now (d) Bill Another User (g) Close

4. Click the Close button at the bottom of the screen to close the wizard.

For more information, check out the [Billing page](#) on our website.

Contact the RSA Help Desk at help@rsanfp.org or RSA staff at 866-940-4083