OCLC ILLiad Billing

Introductions

– Stephanie Spires
- *training@atlas-sys.com*

OCLC ILLiad Billing

- Overview
  - Setting up Billing
  - Billing Manager
  - Billing Reports and Advanced Topics

Billing

- Setting up Billing
  - Billing Table Setup
  - Turning Billing On/Off
    - *Optional:Enable IFM/EFTS*
  - Patron Account & Category Creation
  - Library (LenderAddresses) Billing Categories

Billing Overview

- Setting up Billing
  - Pencil and paper activity FIRST
  - Re-visit current policies, procedures, charges
    - Who is going to be charged?
      - Determine categories
    - What you are charging for?
      - Items
      - Service Level
      - Shipping
      - Other Additional charges
    - How much to charge?
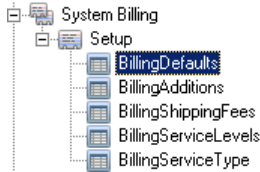   - Base fees and per page fees
  - Keep it as simple as possible

Billing Overview

- OCLC Policies Directory
  - Changes to billing might need to be reflected here too

Billing Table Overview

- Customization Manager Tables

Billing Table Overview

- Customization Manager Tables
  - Billing tables are shared in shared server systems
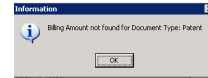

Billing Table Overview

- Billing Defaults

Billing Table Overview

- Billing Defaults
  - Errors result if missing entries for a category or a document type

Billing Table Overview

- Billing Defaults
  - Adding Billing Categories
    - Customization Manager |System Billing | Setup | BillingDefaults
    - Add Record Button to create a blank entry
    - Fill in the appropriate field information for Process Type, Document Type, Default Amount, etc. (use the already defined defaults as examples).
    - Make up a new billing category (Lending examples: InState, International, etc.) and enter that in the Category field.
    - Click the Add Record button.
    - Repeat this for each new billing category which also creates the new billing categories.
    - Next associate the lenders with these new billing categories in Address Maintenance form.

Billing Table Overview

Billing Table Overview

- Billing Additions

Billing Table Overview

- Billing Additions
  - Addition categories are billing categories

Billing Table Overview

- Billing Additions
  - RangeXPages

Billing Table Overview

- Billing Shipping Fees

Billing Table Overview

- Billing Shipping Fees
  - Can add shipping options to Borrowing Request pages
  - Need matching values in the BillingShippingFees table.
  - Customization Manager | Lending | Importing LendingDefaultArticleShipping
    - The default shipping method to set for imported lending article requests.
  - Customization Manager | Lending | Importing LendingDefaultLoanShipping
    - The default shipping method to set for imported lending loan requests.

Billing Table Overview

- Billing Service Levels
  - Note: Since Service Levels are assigned to specific Process Types, (Borrowing, Doc Del, or Lending), any Service Level options for Borrowing will be different from any added to Lending.

Billing Table Overview

- **Billing Service Levels**
  - **Can add to web pages**
    - Any service level options (for example: Rush or Regular) that exist on the ILLiad web pages (Borrowing and Lending) should also exist in the BllingServiceLevels table.

ATLAS
SYSTEMS, INC.

Billing Table Overview

- Billing Service Levels
  - WebDefaultRush
    - Customization Manager | Web Interface | Defaults
    - Values Yes OR No
    - Can change the YesNo AdminType entry for that key in Customization table in SQL Enterprise Manager to StringValue to allow entries such as Rush, Regular, Super Rush

ATLAS
SYSTEMS, INC.

Billing Table Overview

- Billing Service Levels
  - LendingImportAutoRush
    - Customization Manager | Lending | Searching
    - Yes/No Enables/Disables automatic routing of imported transactions to the Awaiting Rush Processing queue based on the presence of the word Rush anywhere in the imported record.
    - Applies to both OCLC and Docline imports.

ATLAS
SYSTEMS, INC.

Billing Table Overview

- Billing Service Type
  - Used very rarely
  - Adds different service types for
  - statistical reporting.
  - ProcessType field values are Borrowing, Lending or Doc Del
  - ServiceType field values are for statistical purposes only.

ATLAS
SYSTEMS, INC.

Billing Overview

- Additional Billing Options

```
白-🖳 System
  白-📇 Billing
      🔑 BillingManagerLive
      🔑 DefaultBillingCategory
```

ATLAS
SYSTEMS, INC.
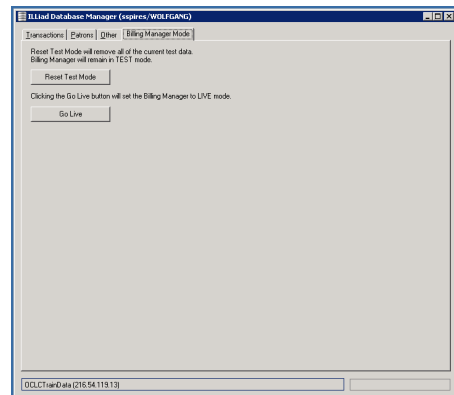
Questions & Answers

Billing Table Overview

- OCLC ILLiad Billing
  - ILLiad Billing for Borrowing
    - Borrower accounts to which transactions may be billed.
    - Default billing amounts
      - Notate billing charges during the check-in process.

ATLAS
SYSTEMS, INC.

Billing Overview

- Borrowing Billing on/off
- Billing by item vs Billing by time period

- Borrowing
  - Barometer
  - Billing
    - BillingActive
    - BillingItemPrintDetailsBorrowing
    - BillingMonthlyInvoiceBorrowing
    - BorrowingBillingbyInst

ATLAS
SYSTEMS, INC.

Billing Overview

- Patron Accounts
  - Created upon registration
  - Can edit accounts from patron web interface
  - Categories can be changed upon clearing customers in ILLiad Client

ATLAS
SYSTEMS, INC.

Billing Overview

- IFM/EFTS

ATLAS
SYSTEMS, INC.

Billing Overview

- ## Patron Accounts
  - Customization Manager | Web Interface| Defaults | WebDefaultBillingCategory
    - Specifies the default billing category to assign to the User record as new customers register with the system.

Billing Overview

- Patron Accounts
  - Customization Manager | SystemBilling | Setup | DefaultAccounts
  - ILLiad can automatically create a new account for all registering users by creating entries in The default billing account can be specified by NVTGC (shared server site code or delivery location) and Status. The account is created immediately after the user record is created and it can display to the user on the EditAccountInformation.html page. This also allows you to edit the EditAccountInformation.html page to not allow customers to create more accounts and just display their account information or any other welcome message for new users.

Billing Overview

- ## Maxcost
  - Field displayed on ILLiad Request Information form in client
  - Can be added to web pages to collect information from patrons

Billing Overview

- **Viewing an ILLiad User's Billing Accounts**
  - When Billing is enabled for Borrowing
    - User Lookup and Edit Form displays Account Information section
    - Displays accounts that a user has set up
    - ILLiad assigns an InternalNo (Internal Number) to each account that is created.

Billing Overview

- To add a billing account for an ILLiad user
  - From the User Lookup and Edit Form
    - Click on Add Account
    - Add User Billing Account form appears
    - Enter the data for the account
    - Click on the Add Account button
  - The account is added to the User Record.
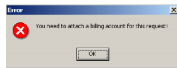
- Account Error Messages
  - User did not or could not designate account when making the initial request.
    - This will be true of most imported requests (E-mail, Loansome Doc, FirstSearch).
  - To correct, ILL Staff choose a billing account from the Billing Acct. dropdown on the Search Requests form.
    - Note: Consultation with the user to determine account preference may be required to select the proper account if multiple accounts exist for that user.
  - If no billing accounts exist for the user, you will need to add one.

Billing Overview

- Outgoing Payments
  - **Verify**
    - Use the information on the General Update form to verify that the invoice is from the institution that you have marked in ILLiad as supplying the piece.
  - **Add Invoice Information**
    - Under Billing Information, click the Invoice tab to view the Invoice Form.
    - Note: If there is already Invoice information on the form, you have already paid the invoice for this transaction.
    - Add the Invoice information to the request. Invoice information on the General Update form requires either an invoice number or an item amount.

Billing Overview

- Outgoing Payments
  - Save Changes to attach the costs to the record.
  - Illiad now has a record of the payment.
    - Pay the invoice as you would normally.

Assigning Charges in Borrowing

- Check item in from lending library
  - Billing information is attached to the record when the check-in process is completed.
  - Search and select item on the Check In from Lending Library Screen
    » Default billing amount is selected for the request type and appears on the Add Billing Charges Form.
    » You can make changes to the amounts and quantities charged at this point.
    » Click the Refresh button to recalculate the amounts.
    » Once you have the Total charge correct, click the Charge button.
    » This will store the billing information in the database for later processing.

Billing Overview

- ### Assigning Charges in Borrowing
  - Can also happen here:
    - Deliver to web
    - Show Billing
    - During invoicing in Billing Manager

Billing Overview

- ### Assigning Charges
  - Exempt Category:
    - Not charged
    - Billing form doesn't pop up

Billing Overview

- Doc Del Billing on/off
- Billing by item vs Billing by time period
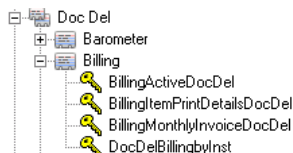
Billing Overview

- ### Assigning Charges
  - Document Delivery
    - Billing form appears upon Marking Item As Found
    - Review Charges
    - Charge or Cancel

Billing Overview

- Lending Billing on/off
- Billing by item vs Billing by time period

```
Lending
  Barometer
  Billing
    BillingActiveLending
    BillingItemPrintDetailsLending
    BillingMonthlyInvoiceLending
    IFMSupport
    LendingBillingByInst
    LendingPaymentMethod
```

ATLAS
SYSTEMS, INC.
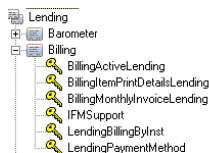
Billing Overview

- Lending Billing
  - Customization Manager | System | Billing | DefaultBillingCategory
    - Specifies the default Billing category to assign to new Lending Institutions.

ATLAS
SYSTEMS, INC.

Billing Overview

- EFTS
  - EFTSActive must be set to Yes. Customization Manager | Lending | Billing.
  - EFTS participants must be marked in the Address Maintenance form.
    - To set the library as an EFTS participant, search for that library and check the checkbox for EFTS. Save changes for the Address.
    - When billing for EFTS items, the billing form appears the same as for other billing. The total at the bottom will say EFTS Total instead of total or IFM Total.

ATLAS
SYSTEMS, INC.

Billing Overview

- EFTS
  - EFTS participants must be marked in the Address Maintenance form.

Billing Information

Billing Category	Default
Billing Address	123 Atlas Way
	Virginia Beach, VA
	12345
Copy Charge	
Loan Charge	
Billing Method	

☐ Copyright Payer   ☑ Docline EFTS
☐ Override IFM   ☐ RLG Shares

ATLAS
SYSTEMS, INC.

Billing Overview

- IFM
  - If the transaction being billed is from an IFM institution, the Total field on the billing form will be labeled IFM Total instead of Total.
  - IFM information, if present, is recorded when the transaction is imported from OCLC and becomes part of the transaction record.
  - Customization Manager | Lending | Billing | IFMSupport key value yes/no
  - Edit Addresses | Override IFM box
    - Even if items come from a library with valid IFM info in the maxcost, ILLiad won't charge via IFM if this box is checked.

ATLAS
SYSTEMS, INC.

Billing Overview

- IFM
  - OCLC Constant Data |Lending Charges field
    - Should be blank
    - ILLiad will enter any charges and add IFM tags for those items billed via IFM.
      - If your constant data has a default value already there, it could create invalid IFM charge formats ($12.00IFMIFM) and cause incorrect billing.

ATLAS
SYSTEMS, INC.

Billing Overview

- IFM
  - IFM Report
    - Webreports | Lending
    - This report shows the items billed via IFM for a given time period. This can be used to compare against the OCLC bills.

ATLAS SYSTEMS, INC.

Billing Overview

- IFM
  - **IFMCOST field**
    - Transactions table
    - Stores information about the cost of a Lending transaction for IFM billing.

ATLAS SYSTEMS, INC.

Billing Overview

- IFM
  - OCLC's IFM service will work with ILLiad exactly as it already works without it. You do not need to do anything special.

ATLAS SYSTEMS, INC.

Billing Overview

- Lending
  - Assigning Charges
    - Mark Item as Found
      - Note: This form will not display for any institutions that you may have designated as Exempt.
    - Look over the charges and make any changes necessary before hitting either of the buttons on the right.
    - Note: If the transaction being billed is from an IFM institution, the Total field will be labeled IFM Total instead of Total.
    - IFM information, if present, is recorded when the transaction is imported from OCLC and becomes part of the transaction record.

ATLAS SYSTEMS, INC.

Billing Overview

- **To Provide the Item Without Charge**
  - If you decide not to charge for the transaction, click on the Cancel button.

ATLAS SYSTEMS, INC.

We Charge What You Charge

- Default Charge in BillingDefaults set to $0 – change upon billing
- LenderAddress record can store Lending/Copy charges for other library
- Can print that charge on stacks search slips

ATLAS SYSTEMS, INC.

Billing Overview

- Billing by Item
  - Invoices are printed after the requested item has been marked as found (At the same time as the Address Labels).
  - Invoice Number and Transaction number are the same.
    - Note: The Billing Manager does not generate per item invoices.

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

Billing Manager

ATLAS SYSTEMS, INC.

Enhancements requested…

- Invoice for lost or damaged item that has not been billed for
- Calculate and handle overdue fines

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- Billing Manager
  - Generating ,printing invoices, and tracking related payments
  - Includes the generation of Docline EFTS payment files
  - *Note: No invoices are generated for IFM requests as OCLC handles the billing of these transactions for you.*

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Billing Manager Requirements**
  - Billing must be turned on for the module for which invoices are to be generated.
  - Billing by Institution over a time period must be enabled for the module for which invoices are to be Generated.
    - *The Billing Manager does not generate per item invoices.*

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Billing Manager Logon**
  - Controlled by User Manager
    - All unchecked by default
  - Billing Manager Borrowing
  - Billing Manager Document Delivery
  - Billing Manager Lending

Username	Group	NVTGC	Billing Manager Borrowing	Billing Manager Document Delivery	Billing Manager Lending	User Manager
atlas	Administrator	ALL	☐	☐	☐	☑
cathy	Administrator	ALL	☐	☐	☐	☑
genie	Administrator	ALL	☐	☐	☐	☑
jglover	Administrator	ALL	☐	☐	☐	☑
johnb	Administrator	ALL	☐	☐	☐	☑
kford	Administrator	ALL	☐	☐	☐	☑
sspires	Administrator	ALL	☑	☑	☑	☑
sslyer	Administrator	ALL	☐	☐	☐	☑
wspires	Administrator	ALL	☐	☐	☐	☑

OCLC ILLiad Billing

- **Billing Manager Logon**
  - Billing Manager Lending
    - –Includes access to the EFTS file generation form
    - –Note: The EFTS option will not appear unless your EFTSActive key is set to Yes.

OCLC ILLiad Billing

- BillingManager.exe is located by default in the ILLiad Share's Billing folder.
- Can create desktop shortcut

OCLC ILLiad Billing

- Any user who attempts to open the Billing Manager without permission assigned in the User Manager will see an Error.
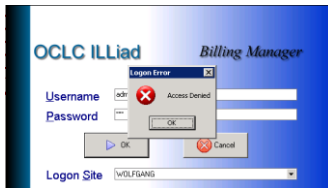
OCLC ILLiad Billing

- **Test Mode**
  - When the Billing Manager is first installed, it will open in test mode.
  - Can go live with Database Manager GO LIVE button
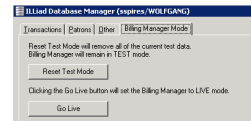
OCLC ILLiad Billing

- **Reset Test Mode**
  - Allows you to remove all of the current test Billing data without going live with the Billing Manager. This allows you to empty any existing test data and continue testing the Billing Manager.
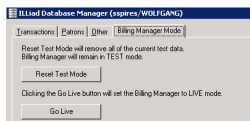
OCLC ILLiad Billing

- **For Shared Server Sites**
  - Billing Manager uses the same views of the ILLiad database as are used by the ILLiad Client and the other ILLiad administrative tools.
  - Generate and access invoice information for the site to which you are connected.
  - Each site can choose to go live with Billing manager independently.

OCLC ILLiad Billing

- **Invoice Numbers**
  - Billing Manager invoice numbers are entirely unique, regardless of the initiating process. No duplicates.
  - When you go live with Billing Manager, the Database Manager locates the highest numbered invoice of any type that currently exists and assigns the next available invoice number to be greater than that number.
  - If no initial invoice number has been entered, the Billing Manager invoices will begin with Invoice number 1.

OCLC ILLiad Billing

- **Date Ranges**
  - **Important**: For the Billing Manager, end date values are now inclusive.
  - You no longer have to use the day after as the end date.
  - Different from what you are used to in the ILLiad client or in the reports, where the end date value is still a non-inclusive "stop date".
  - Not possible to generate invoices with the Billing Manager for the current day's date or for any date in the future.
    - This is a safety feature to ensure that all transactions processed on a particular date are included and that nothing is skipped in the invoice generation process.

OCLC ILLiad Billing

- **Billing Manager Interface**
  - Tour

- One Billing Manager client should be opened for any given site at a time to prevent duplicate invoice creation until development allows multiples.

OCLC ILLiad Billing

- **Billing Manager**
  - Invoice Generation
    - Demonstration

OCLC ILLiad Billing

- **Billing Manager**
  - Searching Invoices
    - Search Invoices button to search for a known invoice number
    - View button on the Previous Invoices tab to search for a specific invoice in the batch.

OCLC ILLiad Billing

- **Searching Invoices**
  - **Criteria**
    - **Start Date of the Invoice Batch**
    - **End Date of the Invoice Batch**
    - **Invoice Number**
    - **Transaction Number**
    - **ILL Number**
    - **Citation Information**
    - **Last Name of the Customer** (Borrowing and Document Delivery) or **Institution Name** (Lending)
    - **Username of the Customer** (Borrowing and Document Delivery) or **Symbol** (Lending)
    - Search Only **Unpaid invoices** or to **Include Cancelled** invoices in your search.

OCLC ILLiad Billing

- Citation Details
  - Customization Manager | Borrowing,Lending,DocDel |BillingItemPrintDetails

OCLC ILLiad Billing

- **Viewing Invoice Details**
  - Double-clicking from the search results.
  - Displays information about the Invoice itself in the Invoice Information section at the top of the form.

OCLC ILLiad Billing

- **Viewing Invoice Details**
  - View total amount of the invoice, the total amount paid toward this invoice total, and the current balance that is still due for this invoice.
  - Re-print the invoice or cancel using the buttons to the right of the form.
  - The Borrower section displays information about the Borrower.

OCLC ILLiad Billing

- **Viewing Invoice Details**
  - Payments tab in the bottom section of the form is where Payments toward invoice balances are entered and tracked.

OCLC ILLiad Billing

- **Viewing Invoice Details**
  - Invoice Items tab is the section of the form where you can view the individual transactions attached to an invoice, and the specific charges that were applied to those transactions.
    - Double-clicking on a particular transaction from this form will bring up the Update Billing Charges form for that transaction, which includes all of the individual charges that make up the transaction's total billing charge.
      - This form can be used to edit the charges associated with a specific transaction if a mistake has been made.

OCLC ILLiad Billing

- **Viewing Invoice Details**
  - The Invoice Tracking tab displays all invoice tracking information associated with the selected invoice.
  - This would include everything from the individual transactions being added to the invoice during the generation process until payment is completed.

OCLC ILLiad Billing

- **Billing Manager**
  - Printing Invoices

OCLC ILLiad Billing

- **Billing Manager**
  - Printing Invoices
    - **The Invoice Documents**
      - One of the following documents will open automatically once the data file has been created:
        - Borrowing
          » BillingManagerInvoice.doc
        - Document Delivery
          » DocDelBillingManagerInvoice.doc
        - Lending
          » LendingBillingManagerInvoice.doc

OCLC ILLiad Billing

- **Billing Manager**
  - Deleting Invoices
    - "undo"
    - Example: Accidentally entering the wrong date range and hitting the Generate Invoices button.

OCLC ILLiad Billing

- **Billing Manager**
  - Deleting Invoices
    - Delete button on the Previous Invoices tab allows you to "un-generate"
    - Available ONLY if:
      - No changes have been made to individual invoices in the batch after generation
      - No payments have been entered for any invoices in the batch.
    - May again generate invoices for the same date range.

OCLC ILLiad Billing

- **Billing Manager**
  - Canceling a single Invoice
    - Search the invoice record for the invoice to be cancelled
      - use the Search button in the top right corner of the Billing Manager
      - or use the View Button to view invoices contained in a specific invoice batch

OCLC ILLiad Billing

- **Recording Payment Information**
  - Display Invoice
  - Invoice Details Payments tab
    - Payment Amount (Required)
    - Check/Reference
    - Payment Method
    - Payment Note

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Recording Payment Information**
  - Payment Amount (Required)
    - Enter the exact amount paid toward the selected invoice. You may type this amount into the field, or you can click the dropdown arrow to open the calculator interface and use it to enter the correct payment amount.
      - *Correction of incorrectly entered payment amounts can be handled by voiding an incorrect payment and re-entering the payment with the correct payment amount.*

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Recording Payment Information**
  - **Check/Reference**
    - This field is intended to record the check number or some other reference number associated with the payment being entered.

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Recording Payment Information**
  - **Payment Method**
  - Check, Cash, Departmental Account, etc.
  - The dropdown for this field displays a list of all unique entries for this value that already exist in the InvoicePayments table.

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Recording Payment Information**
  - **Payment Note**
    - The contents of this note will be added to the Invoice Payment record for the payment being submitted.

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Voiding Incorrect Payment Entries**
  - Identify the payment to be voided on the Payments tab of the Invoice Details form and right click it to choose Void.
    - Note: Voiding a payment is irreversible, but the payment information may be reentered as a new payment if necessary.

ATLAS SYSTEMS, INC.

OCLC ILLiad Billing

- **Billing Manager**
  - **DOCLINE EFTS**
    - **ELECTRONIC FUNDS TRANSFER SYSTEM**
      - If both the borrowing and lending institutions attached to a given transaction are participants in Docline's EFTS Billing service, some of your Lending invoicing can be handled for you by Docline EFTS.
      - In order to get the necessary information to Docline, you will need to generate the EFTS information through the ILLiad Billing Manager and send the resulting EFTS File to your Docline representative.

OCLC ILLiad Billing

- **Billing Manager**
  - **DOCLINE EFTS Requirements**
    - **Billing must be set to Bill By Institution for a specified time period**
      - LendingBillingByInst key MUST be set to Yes
    - **Docline EFTS must be active for your ILLiad server**
      - EFTSActive key must be set to Yes
    - **Your Docline EFTS settings must be input into the Customization Manager.**
    - **EFTS participant institutions must be marked as such in the LenderAddresses(ALL) table.**
      - Maintenance menu's Edit LenderAddresses option

OCLC ILLiad Billing

- **Billing Manager**
  - **DOCLINE EFTS**
    - File may only be generated one month at a time.
    - No more "fake" invoices generated for EFTS transactions
  - Generate
  - Save
  - Submit to Docline

OCLC ILLiad Billing

- **Billing Manager**
  - **DOCLINE EFTS**
    - An EFTS Report contains the same information as the EFTS File, but in a viewable format.
    - Generated one month at a time.

OCLC ILLiad Billing

- **Billing Manager**
  - **DOCLINE EFTS**
    - https://efts.uchc.edu/efts/common/MembersDirectory.aspx
    - Participant list

OCLC ILLiad Billing

- **Going Live**
  - When the Billing Manager is first installed, it will open in test mode.
  - Can go live with Database Manager GO LIVE button

OCLC ILLiad Billing

- **Billing Manager Guide**
  - http://www.atlas-sys.com/Documentation/OCLCILLiadBillingManagerGuide.pdf
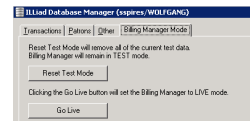
Billing Manager Reports

- Reports tab on the main Billing Manager form displays the available Billing Manager reports for the selected module.

Questions & Answers

Billing Customization

- **Common Modifications to the Edit Account Page**
  - Adding explanatory text so that customers better know what is expected and/or how this information will be used.
  - Changing some of the default text boxes to be dropdowns (to regulate the type of information customers can input into the database) or possibly eliminating them from the form altogether.
  - Requiring the Account Number field using the WebValidation table. This is usually accompanied by adding "Required" text to the page to point out the requirement to the user.

Billing Customization

- Adding billing options to Borrowing Request pages

Billing and Service Options

Account Number	1 - Cash for Pay on Pickup
Cost	
Shipping	
Rush - $5 charge	Regular

Billing Customization

- Adding billing options to Borrowing Request pages

Cost and Service Options

Shipping/Pickup Options UPS ($15)

Select your Service Level - $5 charge for Rush Rush

I am willing to pay: I am willing to pay $10.00 to get this item.

- Selections show up in Client

General Request Information

Transaction Number 604   Doc Type Book
Username inspires   Wanted By
ISSN   Max Cost 10
Service Level Rush   Not Wanted 12/22/2004
Shipping Options UPS

Billing Customization

– Selections show up in Client Billing Charges form

Billing Customization

• Billing Shipping Fees
  – Can add shipping options to Borrowing Request pages

Billing Customization

• Billing Shipping Fees
  – Can add shipping options to Borrowing Request pages

```
<TR>
    <TD></TD>
    <TD>Shipping/Pickup Options</TD>
    <TD>
    <SELECT name="ShippingOptions"
    <OPTION selected>CGIFN=^VARShippingOptions^</OPTION>
    <OPTION value="Fax">Fax ($7 charge)</OPTION>
    <OPTION value="Mail to Home">1st Class Mail to Home Address ($7
    charge)</OPTION>
    <OPTION value="FedEx">FedEx</OPTION>
    <OPTION value="UPS">UPS</OPTION>
    </SELECT>
    </TD>
</TR>
```

You need to have matching values in the billingshippingfees table.

```
<label for="ShippingOptions">
<span class="field">
<span class="<#ERROR name="ERRORShippingOptions">"><b>Shipping</b></span>
    </span>
    <select id="ShippingOptions" name="ShippingOptions" size="1" class="f-name"
    tabindex="4">
    <option selected><#PARAM name="ShippingOptions"></option>
    <OPTION value="Pickup">Pickup at Library (free)</OPTION>
    <OPTION value="Mail to Home">1st Class Mail to Home Address ($7
    charge)</OPTION>
    <OPTION value="FedEx">FedEx ($20)</OPTION>

</select><br />
                        </label>
```

Billing Customization

• Billing Service Levels

```
<tr>
   <td align="center"><font
    size="1">CGIFN=^VARERRORRush^ </font></td>
   <td>Select your Service Level - $5 charge for Rush</td>
   <td><select name="Rush" size="1">
    <option selected>CGIFN=^VARRush^</option>
     <option>Regular</option>
    <option>Rush</option>
    </select></td>
</tr>
```

Note: Any service level options (for example: Rush or Regular) that exist on the ILLiad web pages (Borrowing and Lending) should also exist in the BillingServiceLevels table.

7.2

```
<label for="Rush">

<span class="field">
<span class="<#ERROR name="ERRORRush">"><b>Rush -

$5 charge</b></span>

</span>

<select id="Rush" name="Rush" size="1"

class="f-name" tabindex="4">
<option selected><#PARAM name="Rush"></option>
     <option>Regular</option>
     <option>Rush</option>
</select><br />
                        </label>
```

Billing Customization

- Billing Service Levels
  - WebDefaultRush
    - Customization Manager | Web Interface | Defaults
    - Values Yes OR No
    - Can change the YesNo AdminType entry for that key in Customization table in SQL Enterprise Manager to StringValue to allow entries such as Rush, Regular, Super Rush

---

Billing Customization

- Adding Maxcost to Borrowing Web pages
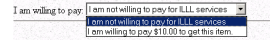
```
<TR>
    <td></td>
    <TD>I am willing to pay:</TD>

    <TD>
        <SELECT name='Maxcost'
            <OPTION
selected>CGIFN=^VARMaxCost^</OPTION>
            <OPTION value='0'>I am not willing to pay for
ILLL services</OPTION>
            <OPTION value='10'>I am willing to pay $10.00
to get this item.</OPTION>

        </SELECT>
    </TD>
</TR>
```

I am willing to pay: I am not willing to pay for ILLL services

---

```
<label for="MaxCost">

<span class="field">

<span class="<#ERROR
   name="ERRORMaxcost">"><b>Cost</b></span>
            </span>

<select id="MaxCost" name="MaxCost" size="1" class="f-name"
   tabindex="4">

<option selected><#PARAM name="MaxCost"></option>
<option value = '10'>I am willing to pay $10 to get this item</option>
 <option value = '.01'>I am NOT willing to pay to get this item</option>
   </select><br />
                        </label>
```

Billing Customization

- Adding Maxcost to Borrowing Web pages
  - Document Delivery Example

```
<TR>
    <td></td>
    <TD>If item is found in your local library collection:</TD>

    <TD>
        <SELECT name='Maxcost'
            <OPTION selected>CGIFN=^VARMaxCost^</OPTION>
            <OPTION value='0'>I am not willing to pay for
document delivery services</OPTION>
            <OPTION value='10'>I am willing to pay $10.00  for
document delivery services.</OPTION>

        </SELECT>
    </TD>
</TR>
```

If item is found in your local library collection: I am not willing to pay for document delivery services

---

Billing Customization

- Carrying MaxCost to OCLC Workform
  - Customization Manager | System | OCLC | Workformmapping
    - *Use MaxCostAmount instead of MaxCost with V 7+*

Field Name	Value
NVTGC	WOLFGANG
WorkFormType	Loan
OCLCFieldName	:MAXCOST:
ILLiadFields	$<#MaxCost>

Billing Customization

- **Setting up ILLiad to Email for a Lost or Damaged Item**
  http://portal.knowledgebase.net/article.asp?article=48039&p=1901

Field Name	Value
ProcessType	Borrowing
Name	Lost or Damaged Item
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Lost or Damaged Item
DefaultFromAddress	ill@yourlibrary.edu
DefaultFromName	ILLiad
DefaultStatus	
FileNameLoan	lostloan.txt
FileNameArticle	lostart.txt
NVTGC	If you have a SSS setup, this will be your site symbol in ILLiad. If not, this will be ILL.

Billing Customization

- **Custom Queue**
  - Awaiting Overdue Resolution
  - Could be DefaultStatus in previous example (KB article)

It's QUESTION TIME!!

•123

THANK YOU