J Client Training

Billing Functions

The billing functions in the J Client remain largely unchanged from the C Client, aside from graphical representation. The following is a function by function review of the billing process as represented in the J Client software.

“Common Tasks” will contain the most often used wizards at the circulation desk, including the **display user wizard**, which begins many billing transactions.

Billing functions are listed in the billing group of wizards on the left side of the screen in the toolbar menus.
Many billing transactions start with the display user screen. If the user has a bill, an alert will be displayed in red text in the upper left corner. Notice the option of paying a bill right from this screen is active with the wizard for “pay bill” displayed above the alert notice. Clicking on this icon will bring you directly to the “pay bill” wizard and display the detail of the patron’s bills and allow you to enter a payment.

Unlike the C Client, in J Client this screen displays full user address information on the main screen, in addition to the separate tabs that appear on the lower half.
Pay Bill

The Pay Bill function allows you to go directly to payment options when handling a patron fine. As usual you can look up a user either by entering a user ID, using the “user search wizard” or by selecting the current user that carried over from previous transaction.

Pay Bill Wizard

“current user” is listed to the right of User ID field and will carry over the previous user identified to the system.
A standard alert screen detailing the user's status will appear. This screen may need to be resized to show all information. Click “OK”.

After selecting the user either by entering the User ID or using the “user search” icon on the upper left part of the screen, the user's billing information is displayed.
Acknowledgment of the alert screen will bring you to the user’s billing record, detailing items outstanding by title, item ID#, reason for bill, and amount owed.

Payments can be made on this screen with indication of payment type. As usual, this can either be in the “total bills and payments section” or the “individual” section below that.

One aspect of J Client functionality that has been noted during testing is that barcode carry over for the billing functions is not there. Nor is the copy and paste feature for either patron or item barcodes effective. This can be a hindrance in processing multiple items off a list, especially when the books are not in hand and staff will need to remember to record item barcodes ahead of time when moving from patron record to billing wizards. One way of getting around this is to configure and use the print screen function for long item lists. The print feature is more robust in J Client and can be configured to export to Word, Excel or directly to an associate printer.
**Bill User**

Unlike C Client, the J Client Bill User wizard asks you to identify user before selecting a “Reason for bill”. There is again the opportunity to carry over the current user from a previous screen. Rather than a screen by screen process, this wizard functions as a single screen form with the selection of “bill user” at the bottom completing the task.

Enter:
- “Reason for bill”
- “Amount”
- “Item Barcode”

To complete bill creation, click on “Bill User” at the bottom of the screen.

If patron is paying immediately indicate “Payment type” and click on “Pay Now”.

“Bill User button completes the bill.”

“Pay Now” if user is paying immediately.