PROCESSING PATRON FINES

Before you can receive payment or forgive a fine, the overdue item must be returned or claimed as lost or damaged (see “Returning Items” beginning on page 1-4).

1. On the toolbar, click Loan, Reserve, or Status.
2. In the Barcode box, type the patron barcode, and then press ENTER.
3. Click Payment. This displays the Payment window (Figure 1.2). The current fine total appears in the Total box under Payment. If the patron intends to pay the fine total now, skip to step 4.

- To exclude an item from payment at this time, clear the Pay check box.
- To accept a partial payment on an item’s fine, click the item’s listing in the Payment column and type the amount being paid now.
- To forgive all or part of a fine, click the item’s listing in the Forgiven column and type the amount to be forgiven.
- To see if a patron previously paid a particular fine, click Paid Fines. To record that the item was previously paid, select the Claimed Paid check box by that item. This eliminates the item’s fine amount in the Payment column, and reduces the payment amount in the Total box.
- To increase an item’s fine amount, click the item’s listing in the Fine column and type the new amount. (This is useful if you want to charge for not rewinding a tape, damage, and so on.)
- To add a new fine, click New Fine. Type the amount of the fine and a note, if desired (the note will display in the Title column of the Payment window). Click OK.
- To apply a refund, click Refund. Type the amount of the refund and a note, if desired (the note will display in the Title column of the Payment window). Click OK.

4. Type the amount of currency received in the Tendered line, then click OK. If change is due back, a dialog box displays the amount to be returned to the patron. To close the dialog box, click Close.

Tip: To view refunds, click History.
5. This displays a dialog box asking if you want to print a receipt. Click Yes or No.

NOTE: If the amount typed in the Tendered box is less than the Total payment amount, an error message displays. Click Close to close the dialog box, then adjust the appropriate entry in the Payment window.

CREATING QUICK PATRON AND ITEM RECORDS

At times, it may be convenient to create a bibliographic (and holding) or patron record while using the M3 Circulation module. Later, you may want to replace a record created on-the-fly with a more complete record.

Creating an Item Record

1. On the Item menu, click Add Bibliographic.
2. Select a template, then click OK.
3. In the 100#a field, type the author’s name (last name, first name). (If you are using a version of M3 that supports Authority Control, the Authority Records dialog box displays. Select an author, then click OK.)
4. In the 245#a field, type the title.
5. In the 852#h, i, and k fields, type the call number (if desired).
6. Click OK.
7. At the prompt “Create Holding Record?” click Yes.
8. To add the call number, right-click in the 852 field, and then click Insert Subfield. In the Insert Subfield dialog box, click k, and then click OK. This inserts a line into 852#k, where you can type the call number.
9. If you are a multi-site library, select your library’s location in the 852#a field.
10. In the 852#p field, type the barcode.
11. In the 991#a field, select the item group to which this item will be assigned.
12. If this is a temporary holding, select the Temp check box. When the item is returned, the record is marked for deletion, and the barcode record is labeled “detached” so it can be used again.
13. Click OK.

Creating a Patron Record

1. On the Patron menu, click Add Patron. (If more than one patron template exists, the Templates dialog box displays. Select the template you want to use, then click OK.)
2. To make sure the patron is not already in the system, type the patron’s last name in the first keyword box, then click Search.
   - If there is no patron in the system with this name, the Create New Patron Record window displays.
   OR