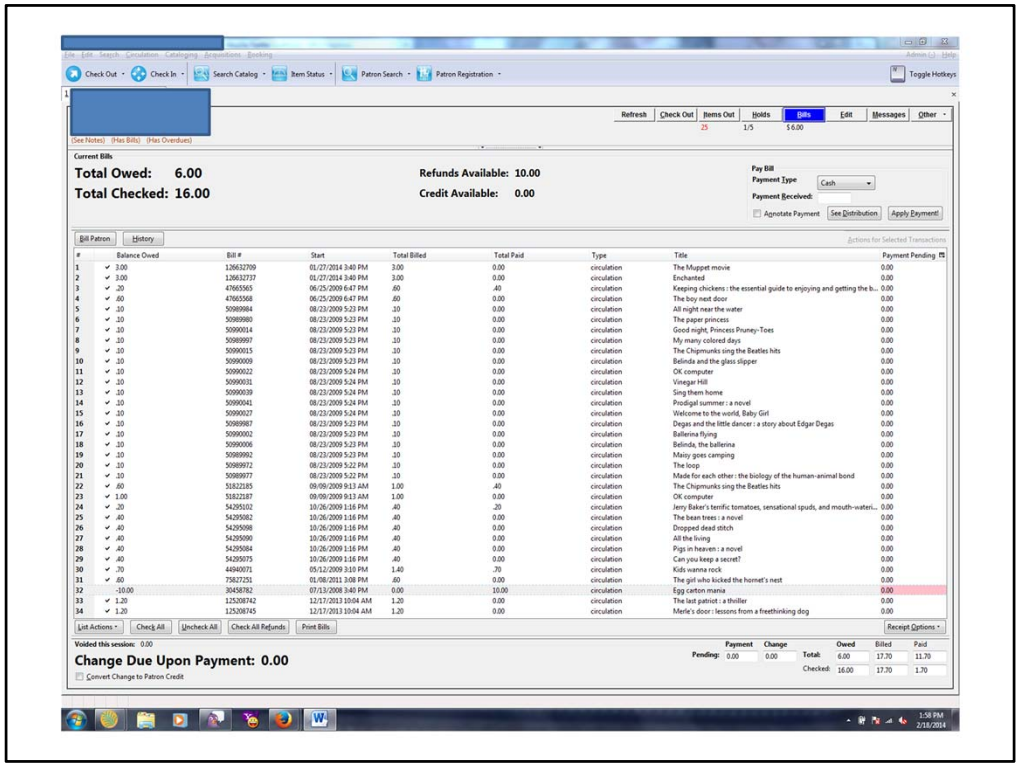
Negative balance caused by a bill being
Forgiven AND Voided



Summary of patron account with a positive balance but includes a negative bill.

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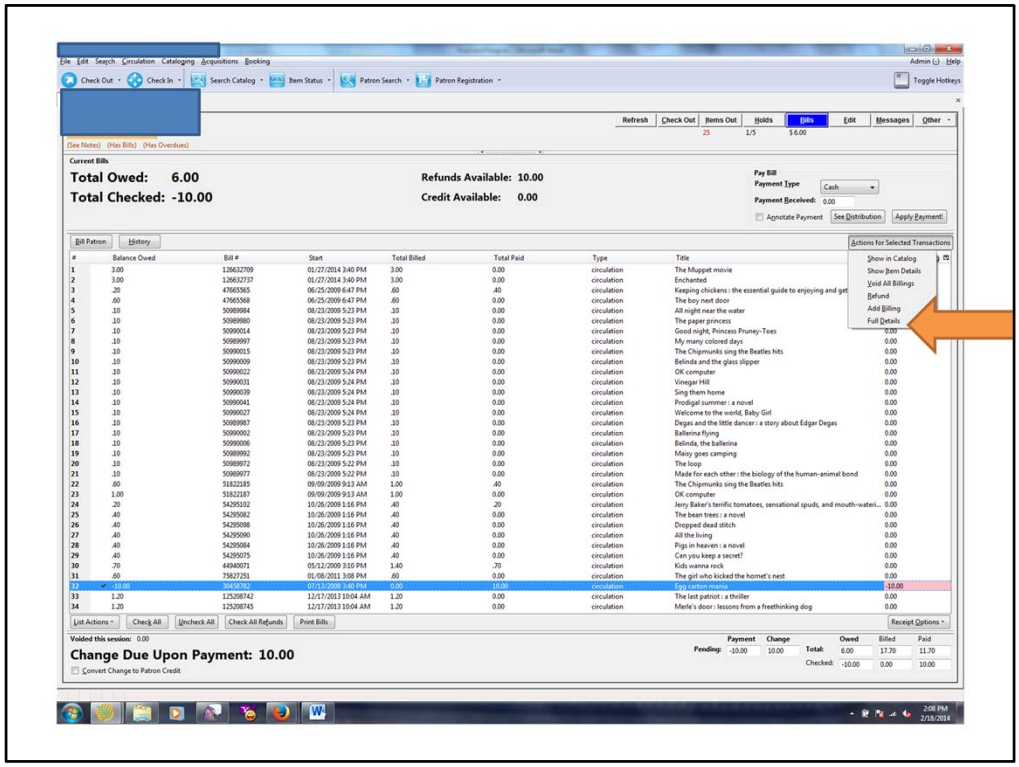

Right click or choose from the “Actions for Selected Item” – “Full Details”

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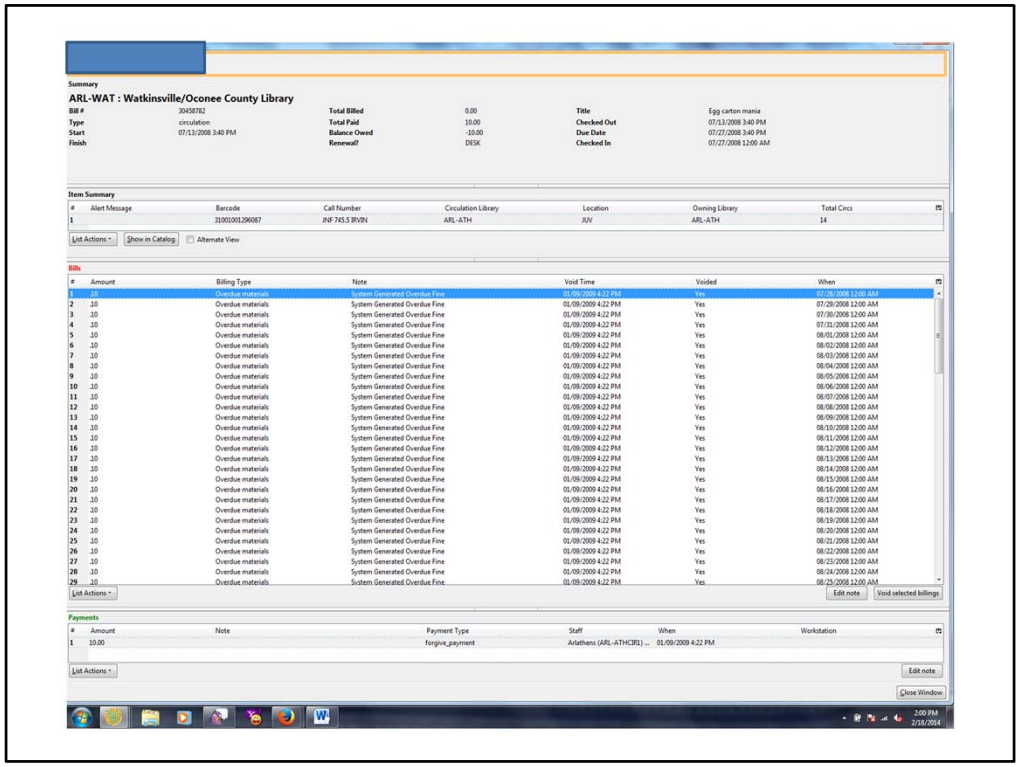

Full Details shows the payment forgiven and the bills voided.

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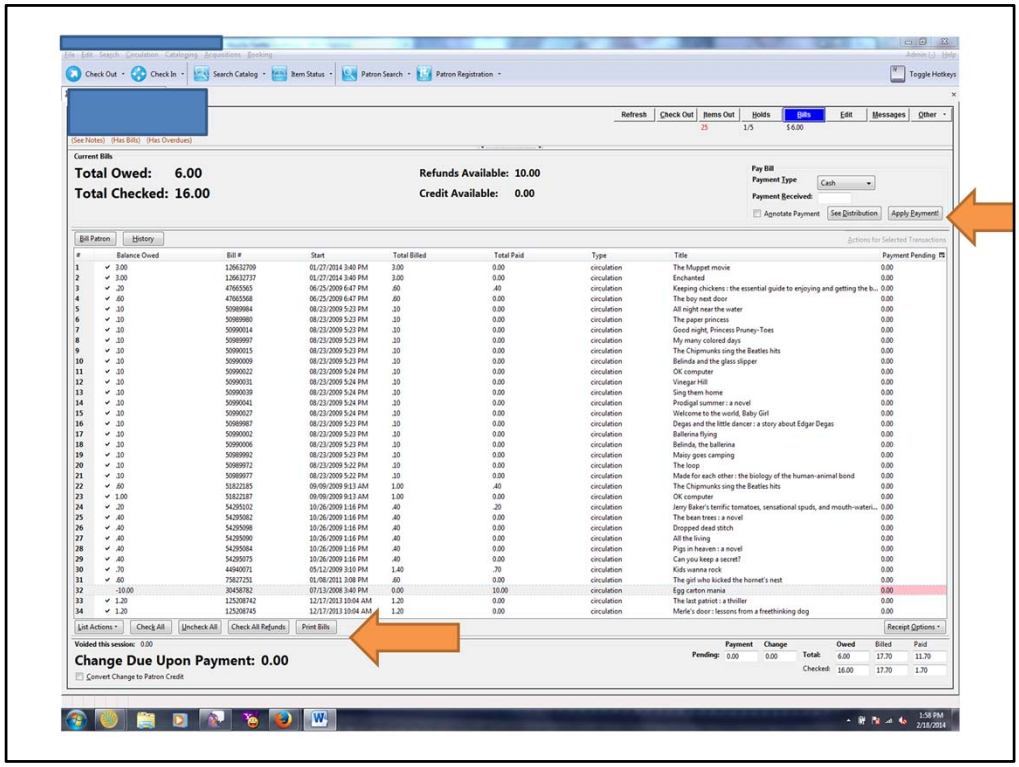

Click “Uncheck All” and “Check All Refunds”. Then click “Apply Payment”.

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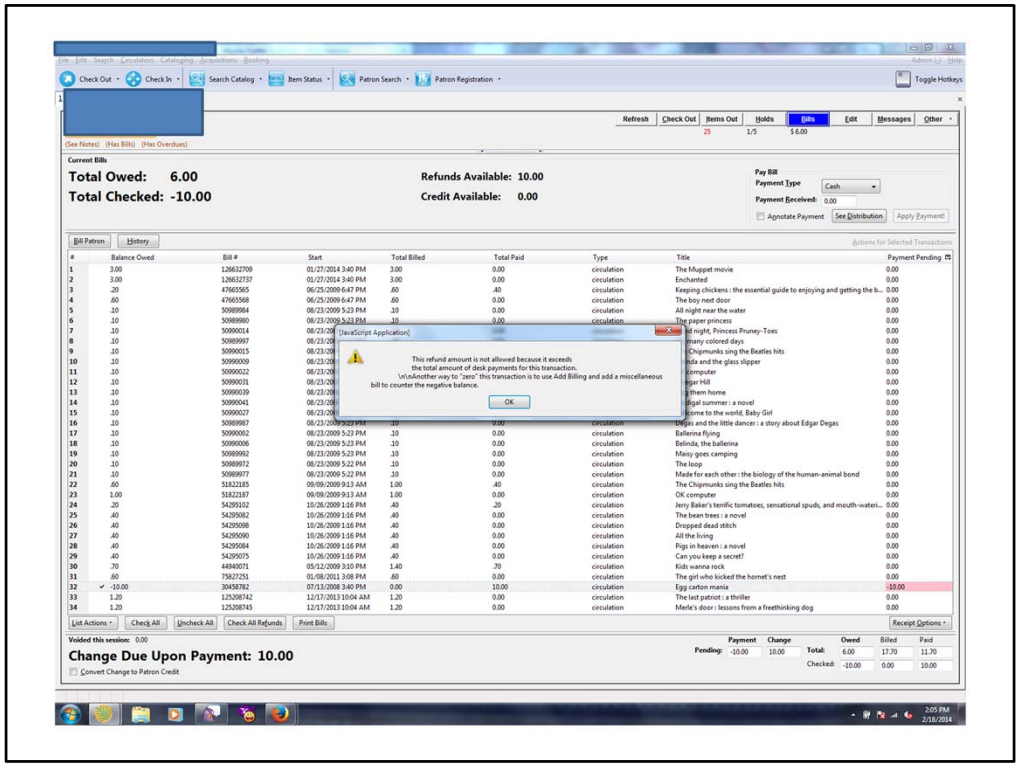

When the refund is greater than money that has actually been paid, a refund is not allowed. This is the error message that is given.

Negative balance caused by a bill being
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There are 2 ways to bill a patron.
The first way creates a new billing line item.
The second way adds billing to an existing line item.

When correcting a bill it is best to add billing to an existing line item. When a new billing line is created it results in a positive billing line item and a negative billing line item. The total will still be correct but there will be unresolved billing line items.

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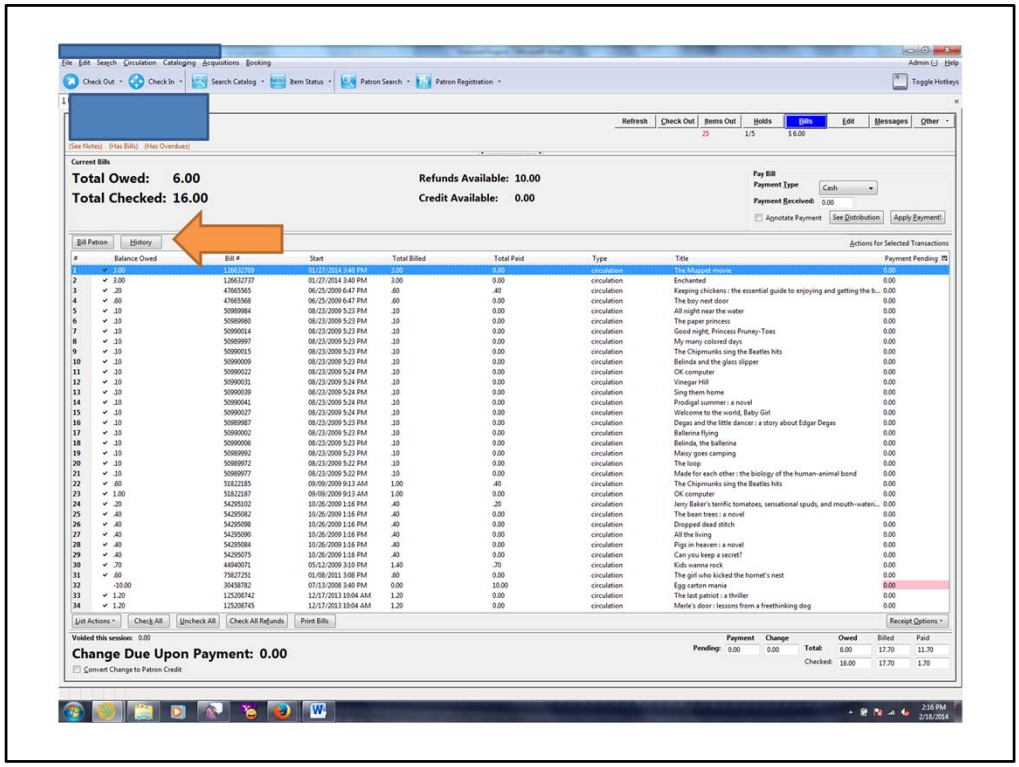

First way to bill a patron. Choose “Bill Patron” in the left corner of the bill screen.

Negative balance caused by a bill being
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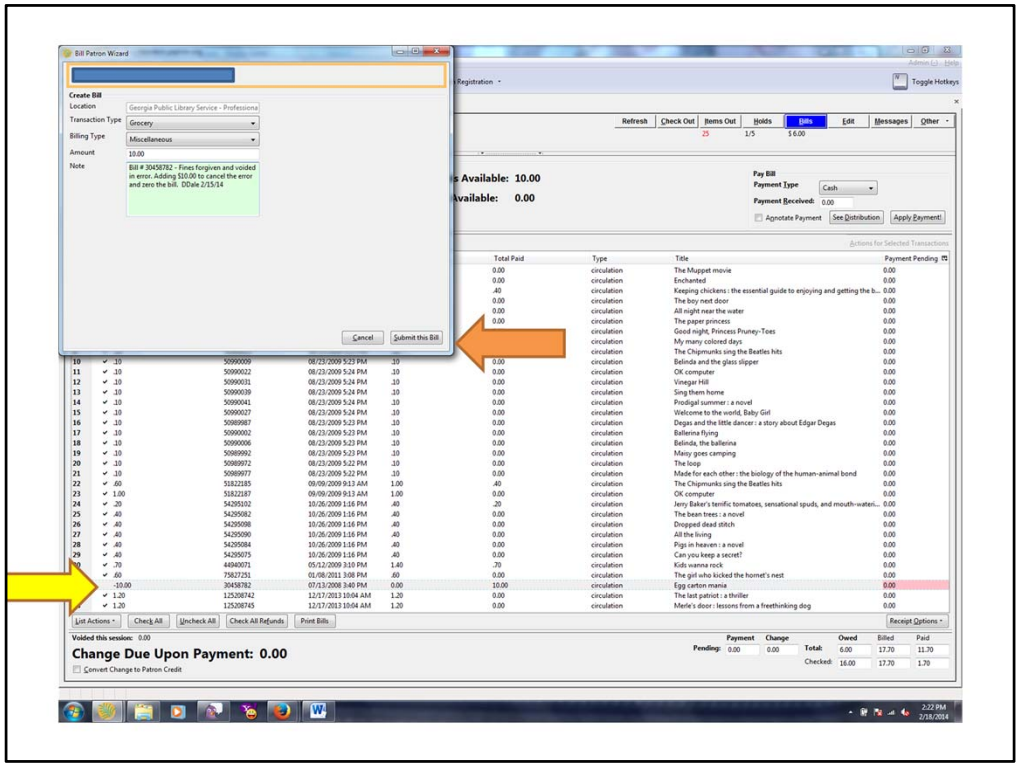

Following the boxes on the billing screen that appears, bill the patron for the amount necessary to zero the account. Be sure to include a detailed note about why the patron is being billed. Click “Submit this Bill”.

Negative balance caused by a bill being
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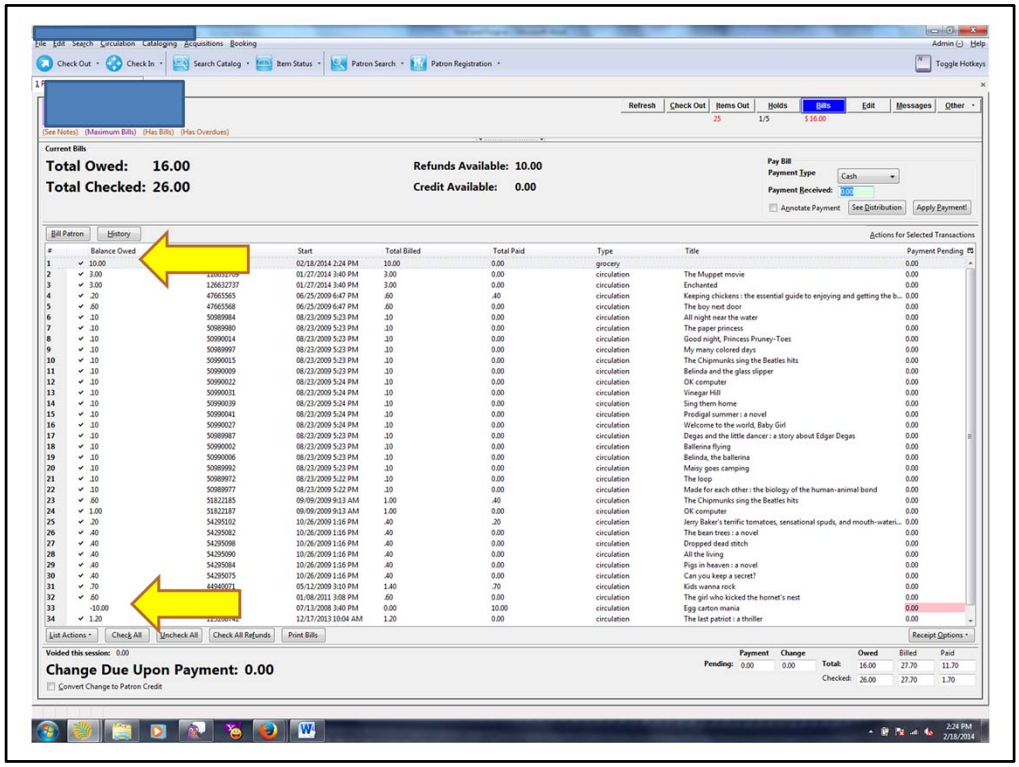

Here the results show a positive bill and a negative bill that will cancel each other out but they will remain as line items on the patron account.

Negative balance caused by a bill being
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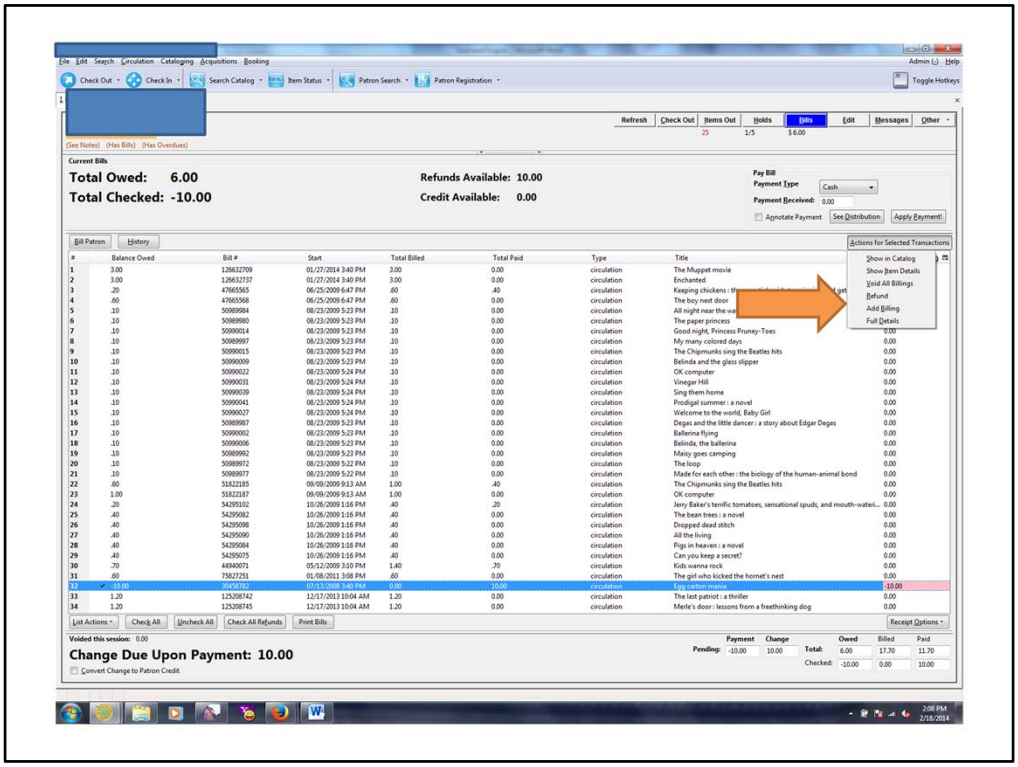

To add billing to an existing line item, right click on the line item or click “Actions for Selected Items” and choose “Add Billing”.

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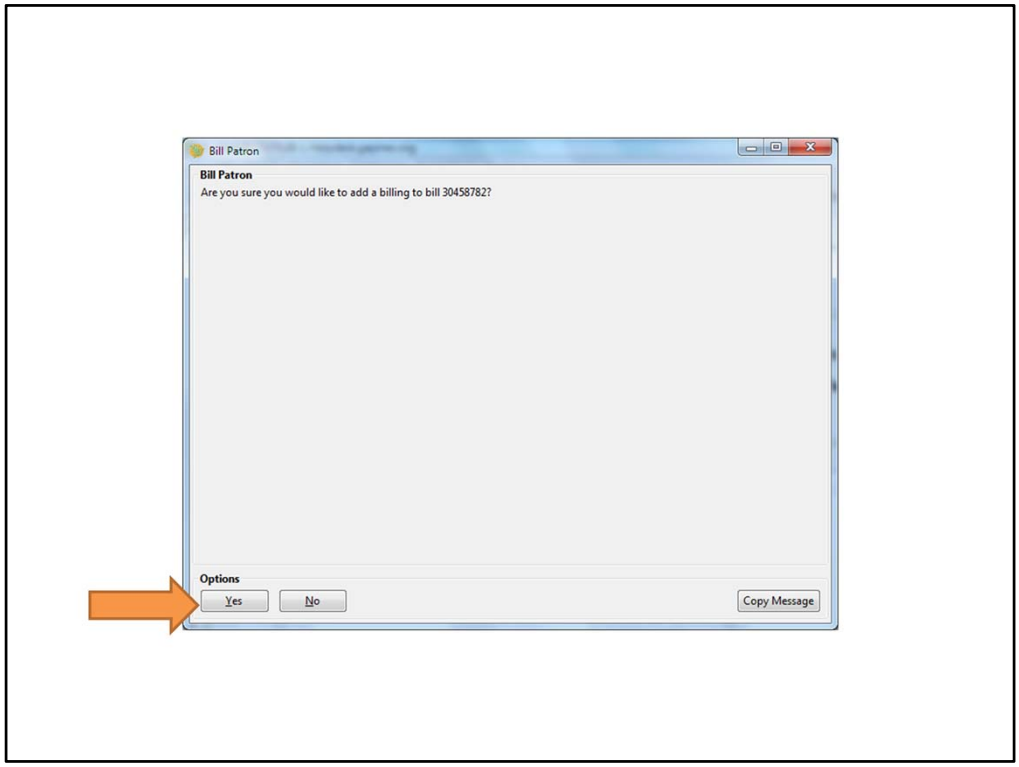

Are you sure you want to add a bill to this bill? Yes.

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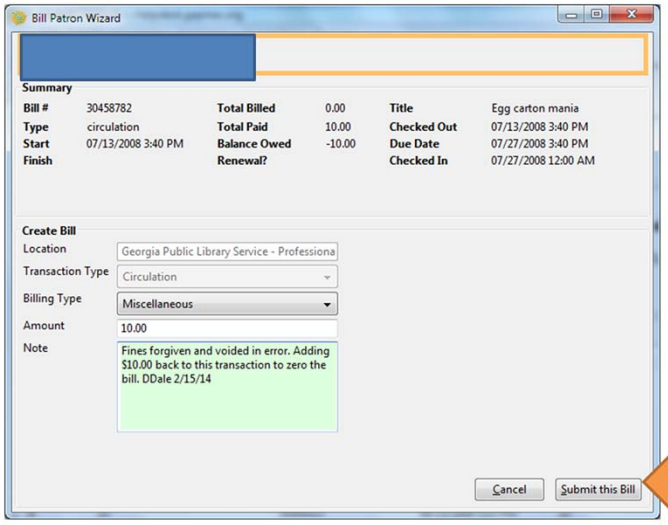

Following the boxes on the billing screen that appears, bill the patron for the amount necessary to zero the account. Be sure to include a detailed note about why the patron is being billed. Click “Submit this Bill”.

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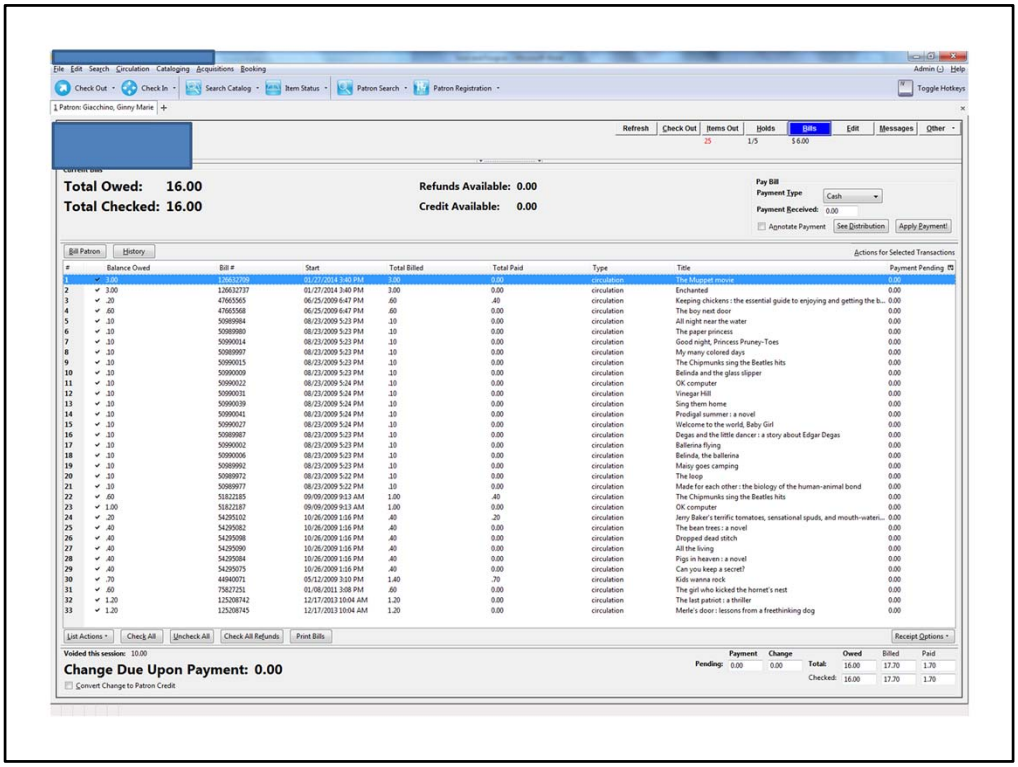

The corrected patron bill.