IDS Session notes for:

**Billing Manager**

Question: Do we only need a billing account created when you charge your borrowing patrons?

Answer: Yes.

Attendee Comment: Two Medical libraries present who currently charge private institutions do not use the billing manager but are working towards utilizing it and taking advantage of customizing the lending queue to place all incoming private institution requests into one queue.

Visiting mentors Mark and Cyril convinced their director to charge a flat rate for loans instead of individual fee rates.

Question: After eliminating a borrowing group, we are still receiving requests-why?

Answer: Need to adjust routing table.

Presenter Comment: OCLC can set billing for your institution from list given to them identifying symbols under certain rate amounts for billing. Better to not set billing if only billing a small number of libraries such as 10 or less.

Question: Can the columns within a queue be adjusted and the changes saved to retain after logging off?

Answer: Right click just below queue header and select “best fit”, changes will be saved.

Question: Within the Additional Billing Charges Form screen, does the page count field need to filled in when the page range is indicated on request?

Answer: Yes, Illiad will not calculate the charge without page count.

Question: Can the IFM charge amount be changed once the request is processed?

Answer: No.

Presenter Comment: IFM will be charged once request is updated received.

Question: To set monthly invoice date in billing manager, is it necessary to set it one day after the end of the month?

Answer: No, set for actual month.

Question: Will a deleted invoice assigned number be permanently deleted or will the number be re-activated?

Answer: Invoice number is gone for good.

Presenter Comment: Don’t delete mailed invoices.

Question: Is there a way to add more space to the notes field?

Answer: No, there is a limit of 250 spaces.