

Management of member fees

In many libraries, readers pay a member fee in order to be allowed to borrow titles. BiblioMaker lets you manage these member fees.

This document describes the setting up and the use of the management of member fees.

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1. Setting up the management of member fees

1.1 Switching on the member fees management

If you want to activate the management of member fees, tick the checkbox **Management of subscriptions** you find in the **General options** (menu **Action>Options>General**) of the Addresses file.

Addresses Options

Show photo in list view

Automatic numbering

Prefix

Next number

Management of subscriptions

Delay for renewals

Maximum delay (in days) between the subscription expiration and the payment for a renewal without interruption. After this delay, the subscription is valid from the payment date.

Cancel OK

1.2 Setting up the member fee amounts

Set up for each address type the fee amount and the subscription duration : in the **Options** of the Adresse file, select an address type, click on the **Modify** button and fill up the fields MEMBER FEE and SUBSCRIPTION DURATION.

Addresses Options

Name Type

Information

Free 1 Free 2 Free 3 Free 4

Period/reminders

Category

Titles

Status

Max nr of loans

Max nr of reserv.

Member fee Subscr. duration months

Format of Address

Addresses

Address

Allow displaying past loans

Balance

Canton

Category

Cancel OK

If there are several fee amounts (for instance for young and older readers, residents of your municipality and of other municipalities, etc.), you will have to create several addresses types. If your addresses file contains already readers who are all grouped in the same type, you may use the **Action>Apply>Type** command to change their type.

1.3 Cataloguing template for addresses

The reader template contains three fields for managing subscriptions :

- **SUBSCRIBER SINCE** : first date of the subscription. This date is updated automatically when the reader pays his first fee. This date can be changed manually with the **Action>Apply** command.
- **SUBSCRIPTION EXPIRED ON** : Validity date for the subscription. If the subscription is not valid any more, a warning is displayed in the loans management window until the reader has renewed his subscription. This validity date is updated automatically when registering the payment of a subscription. It can be modified with the **Action>Apply** command.
- **REMAINS** : amount that the reader must pay (for instance for a fine or for a subscription not paid yet). This field is updated by the system depending on the registration of payment records.

Subscriber since	05.06.2013
Subscription expired on	04.06.2014
Last loan	26.06.2013

1.4 Loans without a valid subscription

If you want to loan titles to readers who don't have a valid subscription (as they would not have paid their first subscription or not renewed their subscription on time), tick the check box called Allow loans without valid subscription. You find this check box in the Loans file, **Action>Options>Renewals**.

Allow loans without valid subscription

2. Managing subscriptions

After the settings have been defined, managing subscriptions is easy.

2.1 Registering a new reader

You register a new reader as usual in the Addresses file.

2.2 Sending a subscription letter

You may print a letter inviting the selected readers to pay (or to renew) their subscription. Either select some readers manually or search them using the criterion of the subscription validity date.

You print the subscription letter from the Addresses file or from the loans management window (menu **File>Print**).

If you'd like to define two different texts (one for the first subscription, one for the subscription renewal), duplicate the **Subscription letter** format and modify the text of the copy.

Define the text of the letter by selecting the **Subscription letter** in the print dialog, then by clicking on the **Options** button.

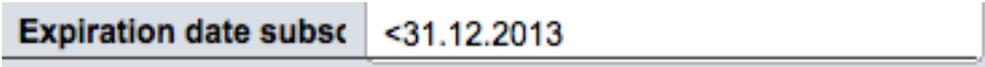
2.3 Printing the List of subscriptions

In the Addresses file, you may print the **List of subscriptions**. This list contains for every reader the date of first subscription, the subscription validity date and the amount of his member fee. The total of the subscriptions fees is printed at the bottom of the list.

2.4 Follow up of readers without a valid subscription

When viewing the Addresses file, readers with an overdue subscription are marked with an asterisk (*) in front of their address type.

You can create a selection of reader records without a valid subscription using the **Action>Find** command in the Addresses file and by filling up the EXPIRATION DATE SUBSCRIPTION field.



Expiration date subsc <31.12.2013

2.5 Loans management

During the management of loans, BiblioMaker checks the validity of a reader subscription :

- If the validity date of a subscription is 0 and if the reader type he belongs to should pay for a subscription, the program displays an alert "Caution! This reader has no subscription". Depending on the status of the Option (**Allow loans without valid subscription**) in the Loans file, you may or may not lend titles to this reader.
- If the subscription is not valid any more, the system displays the alert "Caution! The subscription of this reader has expired on [subscription expiry date]".
- If the expiry date is in a near future (less than 30 days), the system displays an alert : "Caution ! The subscription of this reader will expire on [subscription expiry date]". The reader may nevertheless borrow further titles. The date of return will be calculated as usual and does not take into account the subscription expiry date.

2.6 Subscription payment

Readers may pay their subscription cash or with a bank transfer.

With both payment methods, when you register the payment, the subscription expiry date will be automatically renewed.

2.6.1 Cash payment

Register the payment in the loans management window (**Payments** button) or with the **New** command in the Payments file. Enter the payment cause and if necessary, print a receipt with a tickets printer.

The screenshot shows a window titled "Add Payment - Nr 1" with the following fields and values:

Number	11		
Date	04.09.2015		
Reader code	L1234	Zulauf Lea	
Cause	Subscription	Due date	03.09.2015
Label	Subscription for the period 04.09.2015 to 03.09.2015		
Due amount	20.00		
Cashed amount	20.00		
Paid amount			
Discounted amount	0.00	<input type="checkbox"/> Discount the remainder	
Balance	0.00		
Payment method			
Voucher Nr.			
Cash register code			

At the bottom, there are icons for file operations and two buttons: "Cancel" and "Validate".

2.6.2 Payment with a bank transfer

If the reader pays with a bank transfer, your bank or the Post sends you a list of the payments it has cashed on your account and you register these payments in the system (command **New** or **Modify** in the Payments file).