Charges / Payments Reports

Operations

Reports

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Operations > Reports > Charges / Payments

- Charges and Overdue Fines
- Patron Financials Brief

Charges and Overdue Fines

Charges and Overdue Fines

Textbook Tracker: *Textbook Charges and Overdue Fines - Complete*

Generates a list of which patrons owe money, including charges and overdue fines

Use(s)

Librarians and teachers can run this report to get a list of students in a particular group or class who have unpaid charges. They can then remind their students to pay those charges. They can also create a Saved Report that automatically sends emails to staff with this information periodically.

> ⚠ *Overdue Fines Only* refers to fines being accrued for items that are still checked out. Unpaid overdue fines for items that have been returned are included with the *All Charges, Fees, and Fines* and *Other Charges/Fees* options.

Selections

Selections	Options

See which patrons owe money, including charges and overdue fines. Include records for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Fine or Charge Balance	.01 99999.00
Transaction Date	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	
Title	

✔ **Show Additional Selections**   **Create Saved Report**   **Run**

Options

Selections	Options

Sort by [Last Name ▼]

Include
- ⦿ All Charges, Fees, and Fines
- ○ Overdue Fines Only
- ○ Other Charges/Fees

Example Reports

NOTE: Textbook Tracker offers the *All Charges, Fees, and Fines* format of this report.

Charges and Over...Fines Report.pdf	Charges and Over...erdue Fines).pdf	Charges and Over...
All Charges, Fees, and Fines	Overdue Fines Only	Other Charges

Patron Financials Brief

Patron Financials Brief

Textbook Tracker: *Textbook Patron Financials Brief*

Generates a list of patrons and their balances

> ⚠ Credits are shared between Alexandria Librarian and Textbook Tracker. But depending on which report you run, the calculated balance will be based on Alexandria Librarian *or* Textbook Tracker fines.

Use(s)

Librarians and teachers can run this report to get a list of balances for all students in a particular group or class. They can then let students know if they have any charges or credits. Consider creating Saved Reports that automatically send emails to staff with this information periodically.

Selections	Options

Selections | **Options**

See available credit and balance owed for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons with Balance of	.01 / 99999.00
Transaction Date	From MM/DD/YYYY / Through MM/DD/YYYY ▼
Credit Balance	.00 / 99999.00
Patrons with a Policy of	Any Policy ▼
Patrons from	Homeroom ▼ / From / Through
Patrons in Grade	From / Through
Patrons with Last Name	
Patrons in Barcode Range	From / Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Report   Run**

Selections | **Options**

Sort by   Last Name ▼

Example Report

Patron Financials Brief Report.pdf