

7.1 MANAGING PRICE LIST

If you charge library services to library members, you will define the price list. You can enter, edit or delete the price list in the **Price list** class. Charging of services is based on currently valid price list, except for charging fines for which prices from the price lists which were valid at the time of delay are also taken into account.



Note:

To manage price lists, the privilege CRO_PL – Price list management is required.

7.1.1 Entering price list

When you create a new price list, you can copy the valid price list or an archived price list (see chapter 7.1.1.3). You can also create a new price list without transferring data.

In libraries where loan is organized by departments, the same price list can be applied to all departments or every department can have its own price list. If the price list is different only in some departments, first create a price list that is applicable to the Home library and then create separate price lists for departments where the price list will be different.



Tip:

If the same price list is applicable to all departments and the library does not charge for any services in the department, create a price list with no items for this department.

You can enter and save the price list in the **Price list** class. The price list can have the following statuses: *in preparation*, *valid* or *archived*.

Procedure

1. Highlight the **Price list** class and select the **Class / New object** method.

In libraries with departments, the **Validity** window will open. In libraries without departments, continue the procedure with step 4.

2. Define price list validity.

You can select:

- "Home library" – if a library has no departments or the same price list is applicable to all or several departments
- "Department" – select the department for which you wish to create the price list from the drop-down list

If the parameter for separate price lists by departments is set up, you can select only one of the departments.

3. Click the **OK** button. The **Price list** editor will open.

The data in "Valid from" and "Valid to" are defined by the method for defining price list validity, therefore, you cannot access them in this editor.

4. Select the desired group of services or debts on the tab (see chapter 7.1.1.1) and click the **New object** button.
5. Enter the data (see chapter 7.1.1.2).
6. Save the data.

Price list status upon creation

Price list

- *in preparation*



Tip:

If a library wishes the uniform price list to be applicable to the department with the valid price list, a request must be sent to IZUM.



Note:

If in a library with departments you change the price list validity so that in an individual department, instead of a uniform price list, a price list for this department will be valid, starting from a specified date, it will not be taken into account when calculating the fine for the period in which no archived price list for this department exists.

7.1.1.1 Selecting group of services or debts

You can select one of the following groups of services or debt on tabs:

- Services/debts – member category (LOAN)

This group contains price classes related to member category. You will select the group if you wish to enter the price for membership fee or admission fee or the price for new membership card.

- Services/debts – type of material (LOAN)

This group contains price classes related to type of material. You will select the group if you wish to enter the price for lending fee or fee for the use of material, outside loan overdue fine or reading room overdue fine. You will enter the price for overdue notice to this group, if you charge the costs for overdue notices for every copy separately.

- Services/debts – unit (LOAN)

You will enter the prices for overdue notices (if you charge the costs for each overdue notice regardless of the number of units on the

overdue notice), for notification about available reserved material and for reservation of available copies to this group.

- Services/debts – other (LOAN)

This group contains prices for services that are not related to price classes, e.g. prices for photocopies, lost material, etc. If a library uses the COBISS3/Interlibrary Loan software module, a special service for interlibrary loan must also be entered to this group (see chapter 7.1.1.2).

- Services/debts (ILL)

You will enter prices for interlibrary loan services to this group. The procedure is described in the *COBISS3/Interlibrary Loan User Manual* (see chapter 11.3).

7.1.1.2 Entering and editing services or debts

Procedure

1. To enter new service or debt, click the **New object** button.

The **Service/debt – group** editor will open.

2. Select the service or debt from the code list.

You can select among those types of services or debts that are available according to the selected group.

3. Select the price class from the code list.

The price class depends on which group of services or debts you selected. For some types of services or debts the price classes are related to member category (e.g. membership fee) or to type of material (e.g. overdue fine). In the **Services/debts – unit (LOAN)** group you cannot select the price class. In the **Services/debts – other (LOAN)** group you can specify the price class yourself, but the price list code cannot contain more than three digits.

4. "Service/debts code" is automatically configured from the code for the type of service or debt and from the price list code.

5. "Description" is automatically configured from the value in "Type of service/debts" and from the value in "Price class".

The description is intended to facilitate identification of the code for the service or debt in the reports and can be edited or modified.

6. Enter the data for price calculation in "Unit of measure", "Price per unit", "Tax rate" and "Discount rate". If you the price per unit is not defined, you must enter it when you record the debts manually.



Note:

If you wish to enter debts automatically, you should define the price per unit.

Under "Amount", the total amount is automatically calculated according to entered data.

7. If you selected *exempt from VAT* under “Tax rate”, you must select the appropriate clause under “Exemption clause” from the local code list. The selected clause will be displayed in the summary section of the invoice together with the amount to which the VAT exemption applies.



Note:

The exemption clause can be entered if you previously defined the local code list VAT exemption clause (CODE 323). It is recommended that the clause code has one digit.

8. Select whether the debt will be recorded automatically or manually from the drop-down list in "Calculation method".

Manual debt entry means that you will record the debt on the basis of the price from the price list and manual entry of the number of units.

Automatic debt entry means that debts can be calculated and recorded when performing the procedure. In that way it is possible to record debts for admission or membership fee when registering new members or when the member whose membership expired visits the library. Debts for an overdue fine can be automatically recorded when returning the material or renewing loan period for the material whose loan period expired. If you select automatic calculation under the type of service or debts for which the calculation method is not available, a warning message will be displayed.

9. In "Note" enter the text of the note for internal use.
10. Click the **OK** button.
11. To enter new service or debt, repeat the procedure from step 1 to 9.
12. If you wish to *edit* the service or debt in the price list, highlight it and click the **Edit** button.
13. If you wish to *delete* the service or debt from the price list, highlight it and click the **Delete** button.



Note:

*If a library uses the COBISS3/Interlibrary Loan software module you must enter the service OTHILL in the price list under the **Services/debts – other (LOAN)** tab. Under »Type of service/debts«, select 99 – OTH; under »Price class«, enter the ILL designation. The price is not defined but you can enter the usual price that you charge for delivering items via interlibrary loan. Under »Tax rate«, select the value exempt from VAT; under »Exemption clause«, select the value manually.*

In libraries with departments define the service OTHILL in the price list that applies to the ILL department (i.e. the uniform price list valid for all departments, or a separate price list of the ILL department).

Options

Open the folder **Service/debts – group** in the list of objects related to the price list and select the service/debt you wish to edit from the list. After that select the **Object / Edit** method.

7.1.1.3 Copying to prepared price list

You can create a new price list by finding and selecting the valid price list or an archived price list and by copying it.

Precondition

The price list has status *valid* or *archived*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Copy to prepared price list** method.
3. In libraries with departments, the **Validity** window will open.

You can select one of the following:

- “Home library” – if the same price list is applicable to all or several departments
- “Department” – if you are creating a price list for a specific department, select it from the drop-down list

All defined groups of services and debts will be transferred from the copied price list to the new price list. The values "Valid from" and "Valid to" will not be copied.

Status of the new price list after

Price list

- *in preparation*

7.1.2 Editing price list

You can define, edit and delete groups of services and debts for the price list in preparation. The data is changed in the **Price list** editor.

Precondition

The price list has status *in preparation*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Edit** method. The **Price list** method editor will open.
3. Edit the data (see chapter 7.1.1.1 and chapter 7.1.1.2).
4. Save the data.

Options

You can edit the pricelist by opening the folder **Service/debt – group** in the list of objects related to the price list and by selecting the service or debt you wish to edit from the list. After that select the **Object / Edit** method.

7.1.3 Defining price list validity

The price list in preparation can be defined as valid at any time.

Precondition *Status of the price list is in preparation.*

- Procedure**
1. Find and select the price list.
 2. Select the **Object / Define the price list as valid** method.

The current date is entered in "valid from" for the selected price list and its status is changed. The price list which was so far in preparation becomes valid, while previously valid price list is archived. At the same time the date that is one day earlier than the current date is entered in "Valid to" for previously valid price list. Status of previously valid price list is also changed.

Status after defining validity Price list in preparation

- *valid*

Previously valid price list

- *archived*



Tip:

If you wish to view currently valid price list, select the **Price list** class and the **Class / Load active price list** method.



Tip:

If you wish to print the price list with all groups of services and debts on a printer, first find the price list and in the **Price list** class use the **Object / Print** method.

7.1.4 Deleting price list

You can delete any price list with status *in preparation* from the database.

Precondition Status of the price list is *in preparation*.

- Procedure**
1. Find and select the price list.
 2. Select the **Object / Delete** method.