

RECEIPT TEMPLATE MANAGER

OVERVIEW

The interface for customizable receipts is located in *Tools > Receipt Template Manager*. This feature is turned on/off using the *UseReceiptTemplates* system preference. Two patron permissions have been created for this feature. *Manage_receipts* controls the adding, editing and deleting of receipt templates and *receipts_assign* controls assigning receipt templates.

Libraries can create new receipt templates for reach library by clicking *New Receipt Template* in the *Receipt Template Manager*. Once created, the template must be applied to a triggering event in LibLime Koha by using the *Assign Receipt Templates* button. LibLime Koha automatically determines the active library and only displays templates for that library. To set receipt templates for a different library, click *Set* in the upper right-hand corner of the screen to change your library.

Any number of receipt templates can be created, but only one template can be assigned to each action. Receipt templates can be applied to the following actions in LibLime Koha:


- Circulation
 - Check Out receipts – printed after a patron checks items out.
 - Check in receipts – printed after items are checked in.
 - Item not in computer – printed when a barcode is scanned that does not match any item barcodes in the system.
 - Claims Returned Found – printed when an item with a “claims returned” status is checked in.
 - Lost Item Found – printed when an item with a “lost” status is checked in.
 - Needs Cataloging – printed when an item flagged for cataloging is checked in.
- Holds
 - Hold found – printed when an item is checked in and trapped to fill a hold at the selected library.
 - Transit Hold – printed when an item is checked in and trapped to fill a hold elsewhere in the library system.
- Payments

- Payment received receipt - printed after payment is posted in the patron record. The Print button in the Fines/Pay Fine page defaults to this receipt.

For Transit Hold, Item not in computer, claims returned found, lost item found and needs cataloging, a new pop-up notification appears with an alert message. Staff have three options – *Ok, Ok, print slip* and *Cancel*. The *Ok, print slip* option will trigger the receipt printing. These receipts do not print automatically.

The screenshot displays the Koha library system interface. At the top, there is a navigation bar with links for Circulation, Patrons, Search, and More. Below this is the Koha logo and a search box for existing notices. The main content area shows the path Home > Tools > Receipt Templates. On the left, there is a list of tool categories with expandable arrows. On the right, there are two buttons: 'New Receipt Template' and 'Assign Receipt Templates'.

Circulation Patrons Search More ▾

 Search Existing Notices:

Search

[Search Notices](#) [Check Out](#) [Search the Catalog](#)

[Home](#) > [Tools](#) > Receipt Templates

> [Tools Home](#)

> [News](#)

> [Labels \(spine and barcode\)](#)

> [Calendar](#)

> [Notices](#)

> [Notice/status triggers](#)

> [Moderate OPAC comments](#)

> [Moderate patron tags](#)

> [Log viewer](#)

> [Inventory/stocktaking](#)

> [Batch Item Edit](#)

> [MARC Import \(staging\)](#)

> [MARC Import \(managing batches\)](#)

> [Export bibs/holdings](#)

> [Import patrons](#)

> [Patrons \(anonymize, bulk-delete\)](#)

> [Upload Patron Images](#)

> [Task Scheduler](#)

[+ New Receipt Template](#) [Assign Receipt Templates](#)

Add Receipt Template

Koha module: Circulation

Code:

Name:

Receipt Content:

<ul style="list-style-type: none">BeginTodaysIssuesListEndTodaysIssuesListBeginPreviousIssuesListEndPreviousIssuesList---BRANCHES---branches.branchcodebranches.branchnamebranches.branchaddress1branches.branchaddress2branches.branchaddress3branches.branchzipbranches.branchcitybranches.branchcountrybranches.branchphonebranches.branchfaxbranches.branchemailbranches.branchurlbranches.issuingbranches.branchipbranches.branchprinter	<input type="button" value=" >>"/>	
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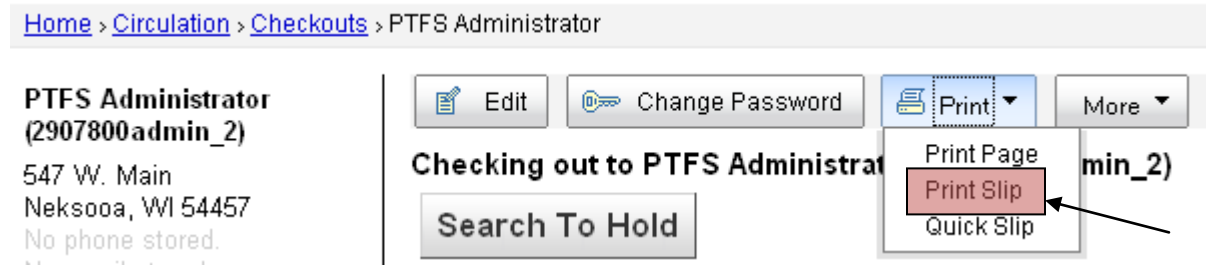
ADDING RECEIPT TEMPLATES

Receipt templates must be created manually for all receipts in the *Receipt Template Manager*. A combination of free-text, HTML tags and the database fields listed in the *Add Receipt Template* form can be used to create custom receipts for your library (or branch). Sample templates are available in the sections below.

CHECK IN RECEIPT

CHECK OUT RECEIPT

The Check Out receipt is typically printed after a patron checks out materials. If assigned, this receipt will print when the *Print Slip* option is selected in the *Print* drop-down box on the *Check Out* page of the patron record. If a receipt is not assigned and the Use



SAMPLE CHECK OUT RECEIPT TEMPLATE

```

<h3><<branches.branchname>></h3>
Checked out to <a
href="/cgi-
bin/koha/circ/circulation.pl?findborrower=<<borrowers.cardnumber>>"><<borrowers.cardnu
mber>></a>
<br />
<h4>Checked Out</h4>
<<BeginTodaysIssuesList>>
  <p>
  <a href="/cgi-
bin/koha/catalogue/detail.pl?item=<<items.itemnumber>>&biblionumber=<<items.biblionum
ber>>&bi=<<items.biblionumber>>"><<biblio.title>></a><br
/>
  Barcode: <<items.barcode>><br />

  Date due: <<issues.date_due>><br />
</p>
<<EndTodaysIssuesList>>

```





NOTE: The lists (<<BeginTodaysIssuesList>> and <<EndTodaysIssuesList>>) within this template are required.

QUICK CHECK OUT RECEIPT


The quick Check Out Receipt is accessed by clicking the *Quick Slip* option in the *Print* drop-down box from the patron's *Check Out* screen.

[Home](#) > [Circulation](#) > [Checkouts](#) > PTFS Administrator

PTFS Administrator
(2907800admin_2)
547 W. Main
Neksooa, WI 54457
No phone stored.

 Edit  Change Password  Print  More


Checking out to PTFS Administrator (min_2)

 Search To Hold

Print Page
Print Slip
Quick Slip ←

ITEM NOT IN COMPUTER


No Item with barcode: 14545312546

 **Print Receipt**

CLAIMS RETURNED FOUND

Item was lost, now found.


Remove from patron's lost items?

  Print Receipt

LOST ITEM FOUND

Item was lost, now found.

Remove from patron's lost items?

  Print Receipt

NEEDS CATALOGING

HOLD FOUND

Hold Found: [Dog world:](#)
Hold for:

- [BOBENH, MICHAOL](#) (12302651456)
- 2651 MAIN ST
ANYTOWN, TX 12345

Hold at Anytown Public Library

Confirm hold Print Slip and Confirm Ignore

TRANSIT HOLD

Hold Found: [New Jersey life.](#)
Hold for:

- [STAFF, PTFS](#) (admin_2)
- 6400 Goldsboro Rd. #200
ANYTOWN, TX 12345
- mmoules@ptfs.com

Transfer to: Anytown Township Public Library

Confirm hold and Transfer

Print Slip, Transfer and Confirm Ignore

PAYMENT RECEIVED RECEIPT

The Payment Received Receipt is printed when the *Print Account Receipt* option is selected from the *Print* drop-down box on the *Fines* page of the patron record (*Account* and *Pay Fines* tabs only).

Administrator

Note: An arrow points to the 'Print' dropdown menu, which has a sub-menu item 'Print Account Receipt' highlighted in red.

PAYMENT RECEIVED RECEIPT TEMPLATE

```
<<branches.branchname>><br>
<<accountlines.timestamp>><br>
<br>
<br>
Payment received<br>
<br>
<br>
Borrower #: <<borrowers.borrowernumber>><br>
<br>
<<BeginFinesPaidTodayList>>
  <<accountlines.description>><br>
  <br>
  Amount:<<accountlines.amount>><br>
  <br>
  <br>
<<EndFinesPaidTodayList>>
```

NOTE: The lists in this template (<<BeginFinesPaidTodayList>> and <<EndFinesPaidTodayList>>) are required. If you wish to print previous fines paid, you can use <<BeginFinesPaidPreviousList>> and <<EndFinesPaidPreviousList>>.

ASSIGNING RECEIPT TEMPLATES

Receipt templates are assigned using the *Assign Receipt Templates* tool which can be accessed on the *Tools* page and also by clicking the *Assign Receipt Templates* button in the *Receipt Template Manager*.