



Credit Overdraft Quota

Credit Overdraft screencast

<http://www.screencast.com/users/goprintsystems/folders/Quota/media/d00636a5-d17b-49c7-a3f7-5608c8de88be>

GoPrint Credit Overdraft provides numerous payment options:

1. When used with a "free Prints" quota, and funds have been depleted, you can continue to allow students to print by granting them a line of credit with the indent to charge their account at the end of the semester. This feature is designed to automatically rollover to the credit allowance after the primary quota reaches a 0.0 balance.

At the end of the semester, a financial report is run, (Based on a date range) and exported to the campus billing office.

2. Students are not granted a "free print quota and start the beginning of the semester with a 0.0 balance and accumulate credit during this time period, and eventually charged.
3. The credit overdraft system allows you to bill specific departments such as, faculty and research departments over a specific time period.

All three scenarios entail creating Quota accounts using a variety of authentication and import methods. LDAP authentication is the most common and preferred method, and when not available, authentication to an external database or bulk importing users using a CSV file are possible.

Department Quota accounts can be a unique Quota id for an individual department and all users print using the single account or individual user quota accounts are created referencing their associated department, as to allow some association for later billing.



Enable Credit Overdraft

Credit overdraft is enabled under the System Policy Accounting tab by checking the Allow Credit checkbox.

A Global Credit Limit must be set and can be fine-tuned At the User Class level.

The screenshot shows the 'Accounting' tab selected. Under 'Integrated Authentication', the 'Always Authenticate, Authorize, & do not lock yourself out of the system' checkbox is checked. Under 'Accounts', the 'Credit Limit' is set to 500.00 and the 'Allow Credit' checkbox is checked.

Enable Credit Overdraft at the User Class Level

Once Credit Overdraft is enabled, the Credit Limit field becomes editable. Here you can enter the desired credit limit you want to provide. Once a user reaches this limit, they will be denied access to release their print jobs.

When using multiple Purses, especially with Scheduled Quota, it's important to apply the credit limit to its own purse for accounting and reporting.

When using the same User Class you can use the Allowance Purse to allow the credit and users will need to select the Next Purse button at the Web Client or Print Release Station to access their credit funds.

Class Name

Pay Methods
Mark the Pay Methods that you want to allow for this class and assign names for the

Type	Purse Name	Credit Limit
<input checked="" type="checkbox"/> Quota	<input type="text" value="Campus Print Funds"/>	<input type="text" value="0.00"/>
<input checked="" type="checkbox"/> Allowance	<input type="text" value="Credit Overdraft"/>	<input type="text" value="200.00"/>



Step 5 - Assign the Quota to a PayPoint



Note: it's assumed the PayPoint was previously configured, and if not, select the Add PayPoint icon to create a new PayPoint or click the pencil icon to enter your existing PayPoint properties.

Financial Section

Allowed Purses

Check the Credit Overdraft Purse

Sort Settings:

If used with another Quota Purse it's recommended to leave the_sort order at 10 and set the primary purse to a lower number so that it appears first to the user.



Allowed Purses

When presented to end-users, purses are sorted by their Sort Order numeric value. Purses with the same sort values are sorted by the purse name.

<input checked="" type="checkbox"/>	Student Quota - Campus Print Funds
Sort Order	1
Payment Connector	Quota Connector is Automatic
Add Value Option	Not Allowed
Add Value Instructions	
Partial Payment Option	Allow
CC Gateway Acct No	
<input checked="" type="checkbox"/>	Student Quota - Credit Overdraft (Allowance)
Sort Order	10
Payment Connector	Allowance Connector is Automatic
Add Value Option	Not Allowed
Add Value Instructions	
Partial Payment Option	Allow
CC Gateway Acct No	



Note: Payment Connector, Add Value Option, Add Instructions, and Partial Payment Option are used with various port of sale systems and don't apply to Scheduled Quota.

Step 4 – Enable Pay Method at a Web Client and Print Release Station

Web Client Popup

PROFILES SECTION

Web Client Profile

PayPoint: select the PayPoint from the drop down menu

Profile Behaviors Header/Footer
Prompts Subnet

Web Client Profile

Location ID

PayPoint

Client Branding

Copy Settings

Description

BEHAVIORS SECTION

Logins

Authentication: Quota

Demo Web Client Properties

Profile Behaviors Header/Footer
Prompts Subnet

Logins

Authentication Guest Users Quota Users

Session Timeout

Behaviors

Allow Payment at: Workstation

Pay/Release Mode: Pay-for-print

Behaviors

Allow Payment At Workstation PayStation

Pay/Release Mode



Print Release Station

GENERAL SECTION

General

PayPoint: select the PayPoint from the drop down menu

General Queues Card Reader

General

Station Name Demo Station

PayPoint Main Campus

Copy Settings

Description

Appearance

To enable a Print Release Station to accept quota payments set:

Mode: PayStation

Authentication Type: Standard

Appearance

Branding Library

Mode PayStation

Initial View User Names

Authentication Type Standard

Step 5 - Create Quota users

New Quota accounts may be created using a number of methods:

When implementing LDAP filters for importing user information to assign to User Classes, it is necessary to first establish a successful communication with the appropriate directory service database used by your organization.

Currently GoPrint supports Novell Directory Services, OpenLDAP, Microsoft Active Directory, and External Authentication to a 3rd party accounting or database account system.

Option #1 – Create users with a LDAP Repository

Add a Standard Authentication Connector

Please select a connector type:



LDAP Server



Microsoft® Active Directory



Novell eDirectory



Refer to the following documentation:

Active Directory and LDAP

http://www.goprintsupport.com/Active_Directory_LDAP.pdf

OpenLDAP and Novell eDirectory

http://www.goprintsupport.com/Novell_LDAP.pdf

Option #2 - Import users using a CSV File

Bulking importing Users

http://www.goprintsupport.com/bulk_importing_users_from_CSV_file.pdf

Importing Users Using a CSV File screencast

<http://www.screencast.com/users/goprintsystems/folders/Importing%20Users/media/b05f6e0a-47b7-420e-b433-efe744e55b4b>

Import Users

Sample CSV Data

LoginID	First Name	Last Name	EMAIL	PASSWORD	BALANCE		
FSMITH	FRED	SMITH	FRED@COX.NET	GOPRINT	4		
test	test	goprint	test@gmail.com	goprint	20		
sherry	sherry	anderson			5		
12345	terry	miller	terry@goprint.com	goprint	50		

Import

All Entries



User Attribute	Field
Account ID	(None)
First Name	(None) LoginID
Last Name	First Name Last Name
E-Mail	EMAIL PASSWORD BALANCE
PIN	
Default PIN	
Reference Number	(None)
Default Reference Number	
Class	(None)
Default Class	(None)
Balance	(None)


1. From the **Field** drop down menu associate the user attribute from the CSV field to the corresponding GoPrint attribute.
2. If PIN/Passwords are not available for import, create a default Pin for all users and enable the option to require users to change PIN at first login
3. Assign Users to the desired Default Class

Option #3 – Manually Create Accounts


Assigned staff members can be granted Rights to manually create Quota users and assign them to the corresponding Scheduled Quota Purse.

1. Accounts – Manage Users
2. Select link to Add a new user

Related Activities



[Create a new account](#)



[View Transactions](#)

3. Select the Scheduled Quota Purse from the Class drop down menu
4. Press Save and Add



Create New Account

You may create a new account here and save it when do The 'Save and Add' feature may be used to quickly add s

Account

Account ID	<input type="text" value="student1"/>
First Name	<input type="text" value="student1"/>
Last Name	<input type="text" value="sample"/>
Email	<input type="text"/>
Card No	<input type="text"/>
Initial Password	<input type="text" value="..."/>
Verify Password	<input type="text" value="..."/>
Reference No	<input type="text"/>
	<input checked="" type="checkbox"/> Active
Class	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">(None)</div> <div style="background-color: #f0f0f0; padding: 2px;">(None)</div> <div style="background-color: #f0f0f0; padding: 2px;">Default Admin Class</div> <div style="background-color: #f0f0f0; padding: 2px;">Default User Class</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Student Quota</div> </div>

Save and Add



How it works!

Credit Limit Balance Screen

Since we are generating a running total, the system balance begins at 0.00 and accumulates as the user draws funds up to their allowable credit.

Quota ID	testuser
Name	test goprint
Credit Available	0.00
Purse	Medical Grad Students Account

Note: Amount of credit is displayed as a negative value

Value = -.10

Quota ID	student1
Name	Student gradstudent
Available	-0.10
Purse	Medical Grad Students Account

Quota User Profile

A Quota User account using a combination of Scheduled Quota and Credit Overdraft would appear as follows:

Current Purses

Purse Name	Balance	Credit Limit Remaining
Student Quota - Credit Overdraft (Allowance)	0.00	200.00
Student Quota - Campus Print Funds	50.00	0.00