
IMPLEMENTATION CHECKLIST

Mailing Labels & Courier Groups in ILLiad

WHAT YOU'LL NEED

- Examples of courier mailing labels
- A list of participating libraries, addresses, and courier codes (or use the label maker)
- Access to customize the ILLiad Client layout
- Access to the ILLiad Customization Manager
- Access to customize the ILLiad print templates
- Time and labor to create and/or edit ILLiad address records for participating libraries

1. CUSTOMIZE SHIPPING METHODS IN CUSTOMIZATION MANAGER

- In System Billing → Setup → BillingShippingFees table, create shipping methods for couriers with ProcessType = Lending .
- Check your Lending → Importing → LendingDefaultLoanShipping & LendingDefaultArticleShipping keys to make sure they match an available shipping method.
- Optional: to ensure your default shipping method appears at the top of the dropdown menu in the ILLiad Client, add a space before the shipping method name you want to appear first on the list. *Example: Instead of “Library Rate” enter “ Library Rate”*
 - Set your Lending → Importing → LendingDefaultLoanShipping & LendingDefaultArticleShipping keys to match your preferred default shipping method; enter a space in front of the name to be consistent with the change made above.

2. CUSTOMIZE THE ILLIAD CLIENT LAYOUT

- On the Lender Address screen, right click and select “Customize Layout.”
- Repurpose unused fields for any courier codes.

ILLiad documentation for customizing the client layout:

<https://prometheus.atlas-sys.com/display/illiad/Customizing+the+Client+Layout>

3. ENTER AND STANDARDIZE ADDRESSES FOR COURIER LIBRARIES

- With your list of participating libraries, ensure that you have a record for each courier library in ILLiad. You may need to create address records for some libraries if you do not have existing records.
- Enter address information the same way for each library. (*Ex. street is always in the Address 2 field*)
- Customize ILLiad Client layout to rename any fields on the Lender Address screen and avoid ambiguity.
- Using the dropdown menus in the Lender Address record, assign each library to a Default Shipping Loan and Default Shipping Article method for the appropriate courier group.

4. CUSTOMIZE THE ILLIAD PRINT TEMPLATES

- Find the BorrowingReturnAddressLabels.doc template and make a COPY; work from the copy
- String together “If...Then...Else” statements in each label field; include a statement to ensure a label will print a shipping method is not assigned and the shipping method field is blank.
- Apply the same changes to your LendingLoanShippingLabels.doc (or your LendingLoanSlips.doc, if your shipping labels live there).

ILLiad documentation for print templates: <https://prometheus.atlas-sys.com/display/illiad/Print+Templates>