

Alerts, Notes, and Messages

There are several ways you can attach messages to a patron's account. The preferred ways to add messages to an account are:

- Messages that should be visible to patrons: Other > Notes > Add New Note (Check "Patron Visible")
- Messages that should be visible to staff only, and appear when patron is retrieved: Messages > Apply Penalty / Message > Alert
- Messages that should be visible to staff only, but do *not* need to appear when patron is retrieved: Other > Notes > Add New Note (Do *not* check "Patron Visible")

Alerts

Add or update an alert by editing the patron's account and typing your alert in the Alert Message fields. This is the least preferable method of adding alerts because there may only be one Alert Message at any time and there is no saved history of prior alerts. If duplicate accounts are merged, this type of alert may be lost.

The Alert Message will appear when you first pull up the patron's account and you can view it again while in the patron's account by clicking Other > Display Alert and Messages.

Notes / Patron Message Center

To add a Note in a patron's account, retrieve the patron's account then click Other > Notes > Add New Note. A pop-up window will open where you can choose to make the note visible to the patron (or not), and enter a title for the note and the note itself. It is good practice to enter your initials (the date and library will be stored automatically). Multiple notes may be stored at once. Notes cannot be edited, but they may be deleted if they are no longer relevant.

If the patron logs into "My Account," he or she will see any Notes that are patron-visible in the Messages screen. Staff can see if patrons have read the messages left in the patron message center by going to Other > Message Center.

The system will also automatically leave notes in the Patron Message Center (see [Automated Notifications](#)) that staff can see by going to Other > Message Center.

Messages

Messages may be used to add notes that can be edited, to apply penalties, and to block accounts.

Click the Messages button in the patron's account to view, add, and archive messages.

To add a new messages, click the “Apply Standing Penalty/Message” button. A pop-up window will open where you may choose to add a Note, an Alert, or a Block to an account. Type in a descriptive message and your initials, then click Apply.

- A “Note” will add a message to this list, but it will not be visible unless you go to this screen.
- An “Alert” will add a message to this list that will also display when you first open a patron's account or when you click Other > Display Alert and Messages. *(This is the best way to add an alert to a patron account because it can be archived for posterity.)*
- A “Block” will add a message to this list that will also display when you first open a patron's account or when you click Other > Display Alert and Messages. It will also prevent the patron from checking out items, placing holds, or renewing items.

The system will also add certain messages to this interface when different actions occur. For example, if staff clicks the “Invalid Address” button in a patron's account, the system will create a message here that says “Patron has an invalid address.”

After an issue has been resolved and the message is no longer relevant, click the Messages button, select the relevant message line item, click “Actions for these Penalties/Messages” and then choose either “Remove Penalty/Message” (which will delete it) or “Archive Penalty/Message” (which will inactivate it and move it to the Archived list at the bottom of the screen).

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