

# Patron Messages and Alerts

*Historical Note: Prior to January 18, 2022, patron alerts, messages, and notes were managed in three different interfaces.*

**Alerts** (such as “Patron exceeds fine threshold”) may be added to a patron's account automatically by the PINES system, or may be added manually by staff. If a patron account has an alert, the alert title will appear in red under the patron's name on the upper left in the staff client. The patron's name will also turn red.

Volkert, Velma



Wallet left at desk

01/13/2022

**Blocks** may also manually be added if necessary. A block appears the same as an alert in the interface, but will prevent the patron from checking out items, renewing items, and placing holds on items.

**Notes** that are not urgent, but contain information that the library wishes to retain for historical purposes, may be manually added by staff. If the patron account has a note, the patron's name will not turn red, but the Notes tab will indicate the number of total notes and messages.

Check Out

Items Out (0)

Holds (0 / 0)

Bills (\$0.00)

Notes (1)

Edit

Other ▾

Show: Required Fields Suggested Fields All Fields | [PINES Field Documentation](#)

## Creating a New Message

To add a message to a patron account, open the account and click on the Notes tab, then click Create Note.

Select either the Note, Alert, or Block option. (Notice that when you change this option, the Penalty Type changes. This provides additional information about the type of message you have chosen.)

The Depth should be set to “All PINES Libraries” in most cases so that when the patron goes to any library location, the staff will see the same messages.

Check the “Patron Visible” box if the message should be visible to the patron when they log into the OPAC and view their messages.

Enter a title for the message, then the complete text of the message. If you are creating an alert, only the title will appear under the patron's name in the patron summary bar.

Enter your first initial, last name, and location in the Initials box (for example, TMcCanna/STATELIB-A).

## Reviewing Existing Messages

The Notes tab will display all previously created messages. Use the standard controls to change the visible columns and change the number of rows you see at once. Click on the column headers to sort columns (most staff will want to sort the Creation Date/Time column to show the most recent messages

first).

Select a message and click Actions > Edit Note to view the complete details of the message and edit it. (Note that some types of messages may not be editable.)

You may also use Actions > Delete Note to permanently delete messages or Actions > Archive Note to move them to the Archived Notes section below. You may select multiple notes to Delete or Archive at once.

## Automatically Added Notes

The system will also automatically leave notes in the Patron Message Center (see [Automated Notifications](#)).

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