**Patron Message Center**

This feature is first available in Evergreen version 2.8

The Patron Message Center provides a way for libraries to communicate with patrons through messages that can be accessed through the patron's OPAC account. Library staff can create messages manually by adding an OPAC visible Patron Note to an account. Messages can also be automatically generated through an Action Trigger event. Patrons can access and manage messages within their OPAC account.

Creating a Patron Message in the Patron Account

1. Retrieve a patron account in the staff client
2. Within the account, go to **Other > Notes.**
3. In the Notes interface, click on **Add New Note**. A new window will pop up that allows you to create a note on the patron account.
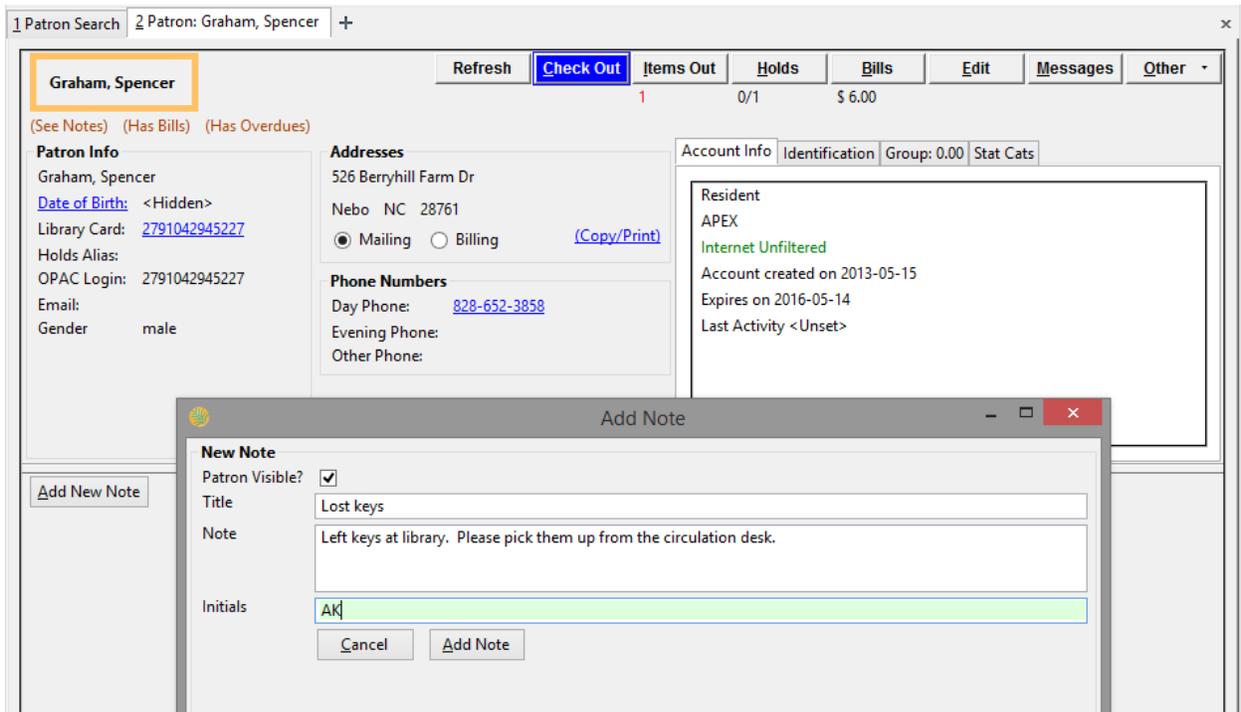
4. Check the box next to **Patron Visible?** This will make the message appear in the patron's OPAC account.
5. Enter a subject for the message in the **Title** field.
6. Enter the body of the message in the **Note** field.
7. Enter **Initials** if staff are required to add initials to notes.
8. Click, **Add Note**. The note will now appear as a Patron Visible note in the staff client and as a Message in the patron's OPAC Account.

9. The patron visible note will also create a message in the patron account in the staff client in **Other > Message Center**. See **Managing Patron Messages in the Staff Client** below.

Creating a Patron Message using Action Triggers

Messages can be automatically added to a patron's OPAC account by an Action Trigger event. For example, when a hold is cancelled by a library staff member, a message can be added to the patron's OPAC account to inform them of the cancellation.

Action Trigger Messages are set up in **Admin > Local Administration > Notifications/Action Triggers**. There are several new fields in the Trigger Event Definition that allow the configuration of Patron Messages:

- Message Library Path: identifies the sending library for the message. This is the patron's home library (usr.home_ou) in the stock Hold Cancellation message.
- Message Template: contains the content of the message.
- Message Title: appears as the subject line in the OPAC message
- Message User Path: determines how to identify the user the message is sent to.

Note: If you want to send patrons a notification email and an OPAC message when their hold is cancelled, use two separate Action Triggers: one for the email notification and one for the message.

Managing Patron Messages in the Staff Client

Patron messages can be viewed and managed in the staff client within the patron account.

1. Retrieve a patron account in the staff client.
2. Within the account, go to **Other > Message Center**.
3. Double click on a message to view the full title and content as well as the date and time the message was created and the date and time that the message was read. Staff can also see if a patron has deleted the message from their OPAC account (Deleted?) and can manually delete a message by marking it as Deleted.

Note: When a message is marked deleted, the message will remain in Other > Message Center as a record that the patron received it.

Notes: Deleting a patron visible note in Other > Notes will not delete the patron message from the Other > Message Center.

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Graham, Spencer		Refresh	Check Out	Items Out	Holds	Bills	Edit	Messages	Other ▾
				1	0/1	$ 6.00			

(See Notes)   (Has Bills)   (Has Overdues)

Patron Info
Graham, Spencer
Date of Birth: <Hidden>
Library Card: 2791042945227
Holds Alias:
OPAC Login: 2791042945227
Email:
Gender   male

Addresses
526 Berryhill Farm Dr
Nebo   NC   28761
◉ Mailing   ○ Billing   (Copy/Print)

Phone Numbers
Day Phone: 828-652-3858
Evening Phone:
Other Phone:

| Account Info | Identification | Group: 0.00 | Stat Cats |

Resident
APEX
Internet Unfiltered
Account created on 2013-05-15
Expires on 2016-05-14
Last Activity 2015-05-08

Reload   Debug

Patron Messages

Delete Selected

Context Org Unit APEX ▾

Back Next Filter

✓	#	Creation Date/Time	Title	Creating Library	Read Date/Time	Deleted?	
☐	1	4/23/15 4:32 PM	Lost keys	APEX	4/23/15 4:44 PM	True	
☐	2	4/23/15 4:37 PM	Lost backpack?	APEX	4/23/15 4:46 PM	False	

	⊗
Creation Date/Time	4/23/15 4:32 PM
Title	Lost keys
Creating Library	5
Read Date/Time	4/23/15 4:44 PM
Deleted?	☑
Message	Left keys at library. Please pick them up from the circulation desk. [AK 2015-04-23 @ APEX]
	Cancel Save

Viewing Patron Messages in the OPAC

Patrons will see a new tab for **Messages** in their OPAC account, as well as a notification of **Unread Messages** in the account summary.

Patrons will see a list of the messages from the library by clicking on the **Messages** tab.

Patrons can click on a message **Subject** to view the message. After viewing the message, it will automatically be marked as read. Patrons have the options to mark the message as unread and to delete the message.

Note: Patron deleted messages will still appear in the patron's account in the staff client under Other > Message Center.