

Instructions for setting up 3-day courtesy notices

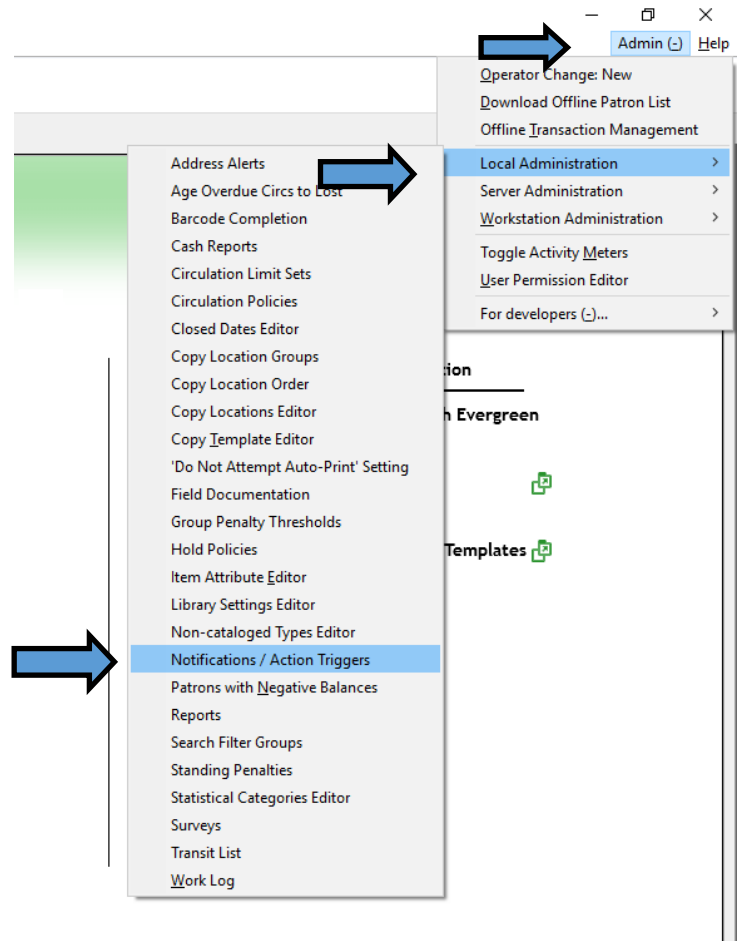
In the top right hand corner of the Balsam page,

Click on

Admin

Local Administration

Notifications/Action Triggers



When the list comes up, check the box beside BALSAM 3 Day Courtesy Notice and then click on Clone Selected

1: jeannebenedict@MOO-StaffLaptop.staff.mainebalsamlibraries.org

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Search Catalog Item Status Patron Search Patron Registration

1 Server Settings +

Go Back Reload Go Forward Debug Print

Event Definitions Hooks Reactors Validators

Trigger Event Definitions New Clone Selected Delete Selected

Back Next Filter

✓	#	Owning Library	Name	Hook	Enabled	Processing Delay	Processing Delay Context Field	Processing Group Context Field	Reactor	Validator	Event Repeatability Delay	Granularity
<input type="checkbox"/>	1	MOO	1 Day Overdue Email Notification	checkout.due	False	1 day	due_date	usr	SendEmail	CircsOverdue		Daily-OD1
<input type="checkbox"/>	2	THO	1 Day overdue	checkout.due	False	1 day			SendEmail	CircsOverdue		Daily
<input checked="" type="checkbox"/>	3	BALSAM	3 Day Courtesy Notice	checkout.due	False	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	4	THORN	3 Day Courtesy Notice	checkout.due	True	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	5	MOO-S	3 Day Courtesy Notice	checkout.due	False	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	6	MOO	3 Day Courtesy Notice	checkout.due	True	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	7	BALSAM	6 Month Long Overdue Notice	longoverdue.auto	False	00:05:00		usr	SendEmail	NOOP_True		
<input type="checkbox"/>	8	BALSAM	6 Month Overdue Mark Long-Overdue	checkout.due	False	6 mons	due_date		MarkItemLongOverd	PatronNotInCollectio		
<input type="checkbox"/>	9	BALSAM	7 Day Overdue Email Notification	checkout.due	False	7 days	due_date	usr	SendEmail	CircsOverdue		Daily-OD7
<input type="checkbox"/>	10	MOO	7 Day Overdue Email Notification	checkout.due	True	7 days	due_date	usr	SendEmail	CircsOverdue		Daily-OD7
<input type="checkbox"/>	11	BALSAM	90 Day Overdue Mark Lost	checkout.due	False	90 days	due_date		MarkItemLost	CircsOverdue		
<input type="checkbox"/>	12	BALSAM	90 Day Overdue Mark Lost Notice	lost.auto	False	00:05:00		usr	SendEmail	NOOP_True		

Trigger Event Definitions

[Back](#) [Next](#) [Filter](#)

Owning Library	<input type="text"/>
Name	<input type="text" value="3 Day Courtesy Notice"/>
Hook	<input type="text" value="checkout.due"/>
Enabled	<input type="checkbox"/>
Processing Delay	<input type="text" value="-3 days"/>
Processing Delay Context Field	<input type="text" value="due_date"/>
Processing Group Context Field	<input type="text" value="usr"/>
Reactor	<input type="text" value="SendEmail"/>
Validator	<input type="text" value="CirclsOpen"/>
Event Repeatability Delay	<input type="text"/>
Definition ID	<input type="text" value="6"/>
Failure Cleanup	<input type="text"/>
Granularity	<input type="text" value="Daily-PD3"/>
Max Event Validity Delay	<input type="text" value="-4 days"/>
Message Library Path	<input type="text"/>

Select your library from the drop down menu—choose the library, not the library-S.

Click the down arrow and select checkout.due

Check this box

Click the down arrow and select SendEmail

Click the down arrow and select CirclsOpen

The other information will fill in when you finish the form so you can ignore it for now.

Scroll down the page until you get to the message box

Trigger Event Definitions

Opt-In Setting Type	<input type="text"/>
Opt-In User Field	<input type="text"/>
Success Cleanup	<input type="text"/>
Template	<pre>[%- USE date -%] [%- user = target.0.usr -%] To: [%- params.recipient_email user.email %] From: [%- params.sender_email default_sender %] Subject: Courtesy Notice Dear [% user.family_name %], [% user.first_given_name %] As a reminder, the following items are due in 3 days. [% FOR circ IN target %] Title: [% circ.target_copy.call_number.record.simple_record.title %] Barcode: [% circ.target_copy.barcode %] Due: [% date.format(helpers.format_date(circ.due_date), '%Y-%m-%d') %] Item Cost: [% helpers.get_copy_price(circ.target_copy) %] Library: [% circ.circ_lib.name %] Library Phone: [% circ.circ_lib.phone %] [% END %]</pre>

This is where you can customize the email. You can rearrange or delete items (I changed the Dear... to first name first and then last name and deleted the Item Cost info.) You can also add additional text. (I added a reminder about being able to renew online or call to renew.) If you're entering a lot of text, hit enter after each sentence. It makes it easier to read if you go back in to edit the form. If you do a test courtesy notice and don't like the way things look in the email or you want to change or add something you can just go back in to your form from the Notifications list (either double click on the little box on the left or check it and then hit enter) and make the changes and resave the form.

After you finish with your message, the last step is to click on Save at the bottom of the page. A message will pop up asking if you want to Clone Event Definition Environment as well—Click OK. Click on Save again and you're done.

<input type="button" value="Cancel"/>	<input type="button" value="Save"/>
---------------------------------------	-------------------------------------