

## Instructions for setting up 7-day overdue notices

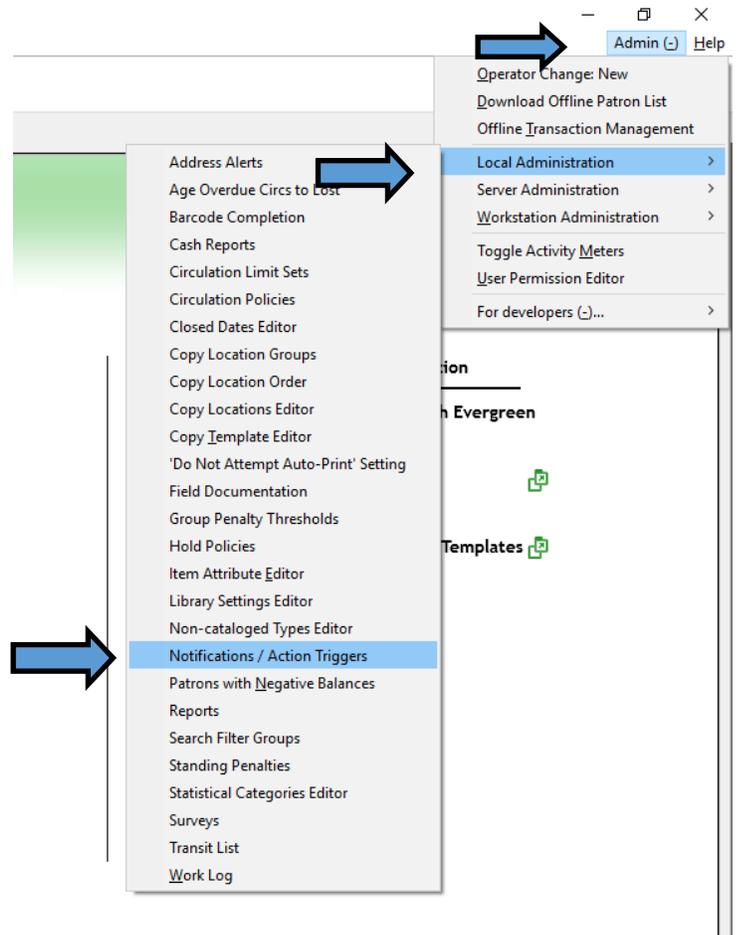
In the top right hand corner of the Balsam page,

Click on

Admin

Local Administration

Notifications/Action Triggers



When the list comes up, check the box beside BALSAM 7 Day Overdue Email Notification and then click on Clone Selected

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File Edit Search Circulation Cataloging Acquisitions Booking

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

1 Server Settings +

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	<a href="#">1 Day Overdue Email Notification</a>	checkout.due	False	1 day	due_date	usr	SendEmail	CircsOverdue		Daily-OD1
<input type="checkbox"/>	2	THO	<a href="#">1 Day overdue</a>	checkout.due	False	1 day			SendEmail	CircsOverdue		Daily
<input type="checkbox"/>	3	BALSAM	<a href="#">3 Day Courtesy Notice</a>	checkout.due	False	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	4	THORN	<a href="#">3 Day Courtesy Notice</a>	checkout.due	True	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	5	MOO-S	<a href="#">3 Day Courtesy Notice</a>	checkout.due	False	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	6	MOO	<a href="#">3 Day Courtesy Notice</a>	checkout.due	True	-3 days	due_date	usr	SendEmail	CircsOpen		Daily-PD3
<input type="checkbox"/>	7	BALSAM	<a href="#">6 Month Long Overdue Notice</a>	longoverdue.auto	False	00:05:00		usr	SendEmail	NOOP_True		
<input type="checkbox"/>	8	BALSAM	<a href="#">6 Month Overdue Mark Long-Overdue</a>	checkout.due	False	6 mons	due_date		MarkItemLongOverd	PatronNotInCollectio		
<input type="checkbox"/>	9	BALSAM	<a href="#">7 Day Overdue Email Notification</a>	checkout.due	False	7 days	due_date	usr	SendEmail	CircsOverdue		Daily-OD7
<input checked="" type="checkbox"/>	10	MOO	<a href="#">7 Day Overdue Email Notification</a>	checkout.due	True	7 days	due_date	usr	SendEmail	CircsOverdue		Daily-OD7
<input type="checkbox"/>		BALSAM	<a href="#">90 Day Overdue Mark Lost</a>	checkout.due	False	90 days	due_date		MarkItemLost	CircsOverdue		
<input type="checkbox"/>		BALSAM	<a href="#">90 Day Overdue Mark Lost Notice</a>	lost.auto	False	00:05:00		usr	SendEmail	NOOP_True		

Event Definitions | Hooks | Reactors | Validators

### Trigger Event Definitions

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

Owning Library:

Name:

Hook:

Enabled:

Processing Delay:

Processing Delay Context Field:

Processing Group Context Field:

Reactor:

Validator:

Event Repeatability Delay:

Definition ID:

Failure Cleanup:

Granularity:

Max Event Validity Delay:

Message Library Path:

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 CircsOverdue

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

Message User Path:

Opt-In Setting Type:

Opt-In User Field:

Success Cleanup:

Template

```
[%- USE date -%]
[%- user = target.usr -%]
To: [%- params.recipient_email || user.email %]
From: [%- params.sender_email || default_sender %]
Subject: Overdue Notification

Dear [% user.family_name %], [% user.first_given_name %]
Our records indicate the following items are overdue.

[% FOR circ IN target %]
  Title: [% circ.target_copy.call_number.record.simple_record.title %]
  Barcode: [% circ.target_copy.baIcode %]
  Due: [% date.format(helpers.format_date(circ.due_date), '%Y-%m-%d') %]
  Item Cost: [% helpers.get_copy_price(circ.target_copy) %]
  Total Owed For Transaction: [%
circ.billable_transaction.summary.total_owed %]
  Library: [% circ.circ_lib.name %]
[% END %]
```

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 the book drop and to let me know if they think they returned the item so that we can check our shelves because we've had that happening!) If you're entering a lot of text, hit enter after each sentence. It make it easier to read if you go back in to edit the form. If you do a test overdue 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.