

# Email Notices

Communicating with everyone is essential when running a busy library, and email is usually the easiest route! Whether it's notifying patrons about holds that are ready to be picked up or letting a librarian know about upcoming reservations, Alexandria and Textbook Tracker offer a variety of notices.

There are two different kinds of email notices: those that are automatic and those that can be set up in Reports. Depending on your library's needs, you can use one or both.

## Requirements

In order for any email notice to work, you need to make sure several things are set up:

- Configure your [Email Preferences](#). These can be accessed through **Preferences > Setup > Email** or **/admin > Email**.
- Add an email to your [site record](#).
- Make sure your patrons and operators have a [Primary Email](#) on their record so they can receive notifications and messages. Run a [Patrons with No Email report](#) to see who still needs to have an email added.



Use [GG4L](#) or [Clever](#) to automatically update patron information, such as email addresses.

## Automatic Email Notices

Some notices go out automatically when certain events happen in Alexandria or Textbook Tracker. Here are a few things to note about these:

- In order for patrons and librarians to get these notices, you must have [Enable Automatic Email Notifications](#) turned on in **Circulation Preferences**.
- Several notifications also require additional preferences to be set.
- Some notice text can be customized and some can't. Those that can be customized are managed in [Circulation Letters](#) or [Advanced Bookings Notices](#).



These notices are Alexandria only.

Notification	Recipient	Additional Preferences	Customized Notice Text
<b>Queue Hold</b> <ul style="list-style-type: none"><li>• Librarian places a hold on an unavailable item through Circulation</li><li>• Patron places a hold on an unavailable item through Researcher</li></ul>	Patron	N/A	N/A
<b>On-Shelf Hold</b> <ul style="list-style-type: none"><li>• Patron places a hold on an available item through Researcher</li></ul>	Librarian	Turn on <a href="#">Circulation Preferences &gt; Circulation Rules &gt; Email Librarian when an On-Shelf Hold is placed through Researcher</a> .	N/A
<b>In-Stock Hold</b> <ul style="list-style-type: none"><li>• Librarian bookdrops an on-shelf hold or hold queue item through Circulation, making it in-stock</li></ul>	Patron	N/A	<a href="#">In-Stock Hold</a>
<b>Expired Queue Hold</b> <ul style="list-style-type: none"><li>• Expired pending hold is automatically removed during daily maintenance</li></ul> <div> Expired in-stock holds are not automatically removed. They stay until the item is bookdropped.</div>	Patron	Set hold expiration dates with the <a href="#">Days to keep a hold request in the queue</a> preference in <b>Patron Policies</b> .	N/A



These notices are Alexandria only.

Notification	Recipient	Additional Preferences	Customized Notice Text
<b>Reservation Placed</b> <ul style="list-style-type: none"> <li>Librarian places a reservation through Circulation</li> <li>Patron places a reservation through Researcher</li> </ul>	Patron  Librarian (at site that owns the reserved copy)	Turn on <a href="#">Circulation Preferences &gt; Circulation Rules &gt; Notify Librarian on New Reservation</a> for the librarian to get a notice.	<b>Patron Notice:</b> <a href="#">Reservation Notice</a> and <a href="#">Reservation Placed</a>  <b>Librarian Notice:</b> N/A
<b>Reservation Upcoming</b> <ul style="list-style-type: none"> <li>Sent when there are a certain number of days before the reservation start date</li> </ul>	Patron	Turn on <a href="#">Circulation Preferences &gt; Circulation Rules &gt; Notify Patron of Upcoming Reservations</a> .  Use <a href="#">Circulation Preferences &gt; Circulation Rules &gt; Days to Look Ahead for Reservations</a> to modify the number of days Alexandria looks ahead before emailing upcoming reservation notifications.	N/A
<b>Reservation Removed</b> <ul style="list-style-type: none"> <li>Librarian removes reservation through Circulation</li> <li>Patron removes reservation through Patron Status (Researcher)</li> </ul>	Patron	N/A	<a href="#">Reservation Removed</a>
<b>Reservation Return Request</b> <ul style="list-style-type: none"> <li>Sent when there are a certain number of days before an Advanced Bookings reservation is due</li> </ul>	Patron	Use <a href="#">Advanced Bookings Preferences &gt; Settings &gt; Days Before Item Is Due to Send Out Notice</a> to set the number of days before items are due to send the notice.	<a href="#">Reservation Return Request</a>




These notices work for both Alexandria and Textbook Tracker.

Notification	Recipient	Additional Preferences	Customized Notice Text
<b>Overdue Item/Textbook</b> <ul style="list-style-type: none"> <li>Checked out item or textbook becomes overdue</li> </ul>	Patron	Set transaction periods and hard due dates in <a href="#">Item Policies</a> .	<a href="#">Circulation Letter</a>
<b>Lost Item/Textbook</b> <ul style="list-style-type: none"> <li>Overdue item or textbook is declared lost</li> </ul>	Patron	Use <a href="#">Item Policy &gt; Overdue &gt; Declare Lost When Overdue</a> to set the time period after which overdue items will be declared lost.	N/A



These notices work for both Alexandria and Textbook Tracker.


Notification	Recipient	Customized Notice Text
<b>Charge Incurred</b> <ul style="list-style-type: none"> <li>Charge is incurred on the patron's account (overdues, overdue continuing to accrue, item being declared lost or discarded, manual charges from Circulation)</li> </ul> <div>  If you make the charge manually in Circulation, you must check the option to email a receipt; charges made with the F and DL commands won't send a receipt/notice.         </div>	Patron	N/A
<b>Charge Paid</b> <ul style="list-style-type: none"> <li>Charge is paid from Circulation and librarian checks the option to email a receipt</li> </ul>	Patron	N/A

<b>Charge Forgiven</b> <ul style="list-style-type: none"> <li>Charge is forgiven from Circulation and librarian checks the option to email a receipt</li> </ul>	Patron	N/A
<b>Charge Refunded</b> <ul style="list-style-type: none"> <li>Charge is refunded from Circulation and librarian checks the option to email a receipt</li> </ul>	Patron	N/A
<b>Credit Added</b> <ul style="list-style-type: none"> <li>Credit is added from Circulation and librarian checks the option to email a receipt</li> </ul>	Patron	N/A
<b>Credit Refunded</b> <ul style="list-style-type: none"> <li>Credit is refunded from Circulation and librarian checks the option to email a receipt</li> </ul>	Patron	N/A

## Report Email Notices

Some notices are set up and sent through [Reports](#). With these, you can:

- Send a notice once or [save and schedule](#) it to go out on a regular basis.
- Use selections to be more specific about which patrons get a notice.
- Customize the notice text. Some notices have default text that's determined by [Circulation Letters](#), but it can still be edited while setting everything up.

Report	Use	Circulation Letter Default
<b>Alexandria and Textbook Tracker</b>		
<a href="#">Account Introduction</a>	Give patrons their login credentials and other important library information	Account Access Information
<a href="#">Account Expiring Notice</a>	Notify patrons whose accounts are expiring in the next 30 days	N/A
<a href="#">Send Email</a>	Send out a customizable email to a selection of patrons	N/A
<a href="#">Send Patron Details Email</a>	Email Patron Details to selected patrons  <div> You can also email or print Patron Details from <a href="#">Circulation</a>.</div>	N/A
<a href="#">Overdue Items Notice</a> *	Notify patrons who have items that are overdue	Circulation Letter
<b>Alexandria Only</b>		
<a href="#">Coming Due Items Notice</a>	Let patrons know their items are due soon	Circulation Letter
<a href="#">In-Stock Hold Notice</a>	Notify patrons when an in-stock hold is ready for them to pick up	In-Stock Hold
<a href="#">Lost Items Charge Notice</a>	Notify patrons who have unpaid lost items charges	Circulation Letter
<a href="#">Overdue Items and Unpaid Charges Notice</a> *	Notify patrons who have overdue items and/or unpaid charges	Circulation Letter
<a href="#">Severely Overdue Items Notice</a>	Notify patrons who have items that are severely overdue	Circulation Letter
<a href="#">Unpaid Charges Notice</a> *	Notify patrons who have charges that haven't been paid yet	Circulation Letter



\* When using the Email format for these notices, you can choose whether to send the notice to *only* the Primary Email or *all* emails on selected patron records. This allows you to notify both patrons and parents/guardians if necessary.

If there are emails you want for reference but don't want to use for notices, we recommend putting them in the [General Notes](#) section of patron records.

For automatic notices and other email notices, emails send to *only* the first email in the patron record (the Primary Email).

