New Library Cards

Do not use

eg: Jr or III

Adult or Juvenile w/ Restrictions

Term: "3" choose "years" from drop-down menu

Use if you are issuing cards for several members of the same family. When first card is finished and saved click this to copy to work form to save you time.

Add/Edit Address

Address:
- Type: Home
- Country: USA
- Postal code: 12305
- Street 1: 150 1/2 Front St-Unit 7
- Street 2:
- City: SCHENECTADY
- County: SCHENECTADY
- State/province: NY

OK   Cancel

Enter address, no period punctuation after St or Rd, etc.

Type in zip code, drop down box may appear

Patron Registration - 346907 - Addresses - Polaris

File Edit View Links Tools Help

Registration

- Barcode: 1001000082005
- Last name: LaFera
- First name: Leah
- Middle name: M
- Title: Suffix:

- Registered at: Canajoharie Library (CAN)
- Patron code: Staff / Board
- Expiration: Term: 0   Date: 3/13/2016

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	150 1/2 Front St	Unit 7	SCHENECTADY	NY	12305	SCHENECTADY	USA

Address Check
- Term: 0   Date: 3/13/2016

Add...   Edit...   Remove   Mailing Label

- Notices address: Home
- Notification option: TXT Messaging
  - Additional TXT notice
- eReceipt option: Email Address
- Email address: diane@sals.edu

- Phone 1: 845-532-1135   AT&T   TXT ☑
- Phone 2:
- Phone 3:
- FAX number:
- Alt Email address:

NUM

Email if they have one

eReceipt they can choose TXT or Email, or none. TXT will send a text message for each item borrowed. Email will send a list of items borrowed. This will happen several minutes after check-out.

How overdue notices arrive. Only 3 options: Mailing Address (we print & mail), Email Address (automatic email), and TXT Messaging (automatic TXT.) Note that final bills are always Mailed by post office regardless of which of the above options they select. For now let's leave the "Adittional TXT notice" box unchecked unless patron requests. What happens if you check the box is that if they have either "email" or "mailing address" as their notification option they will also get a text message in addition.

Phone number. If cell, put carrier in & check the TXT box.

5/13/13 LL

Patron Registration - 346907 - General - Polaris

File   Edit   View   Links   Tools   Help

Registration

Barcode: 1001000082005
Last name: LaFera
First name: Leah
Middle name: N
Title: [ ]   Suffix: [ ]

Registered at: Canajoharie Library (CAN)
Patron code: Staff / Board

Expiration:
Term: 0   [ ]   Date: 3/13/2016

General
Gender: ○ Male   ● Female   ○ N/A
Statistical class: Schenectady-City
Password: ●●●●
Language: English
Former barcode: [ ]
Birth date: ☑ 5/15/1983
Date of original registration: ☑ 9/ 4/2007
Last activity date: 4/18/2013 9:20:58 AM

☐ Exclude from collection agency
☐ Exclude from overdue notice
☑ Exclude from hold notice
☐ Exclude from billing

☑ Maintain reading list
☐ E-mail notices in plain text
☐ Do not delete patron record

User defined fields
ID Number
605852706 NY

Privileges / Restrictions
[ ]

Voter Registration
[ ]

Cassie Use Only (XXX,YYY)
SCPL,CPH

Not Currently In Use
[ ]

For Help, press F1   NUM

Annotations:

- M or F?

- Stat class is where they live, sometimes a town may have 2 stat classes: village or town, ask patron to verify which.

- DOB

- DL # is ideal. Look at list of data entry conventions posted at library desk for other forms of ID. If a parent it will look like this: 605852706 NY (mother)

- Last four digits of phone number. They can change later through you or the PAC

- We do not use but some libraries do .If patron wants later on to keep track of items they borrowed you click the "Maintain Reading List."

5/13/13 LL