

# Patrons

Before importing or adding patrons be sure to set up your [patron categories](#).

## Add a new patron

Patrons are added by going to the ‘Patrons’ module.

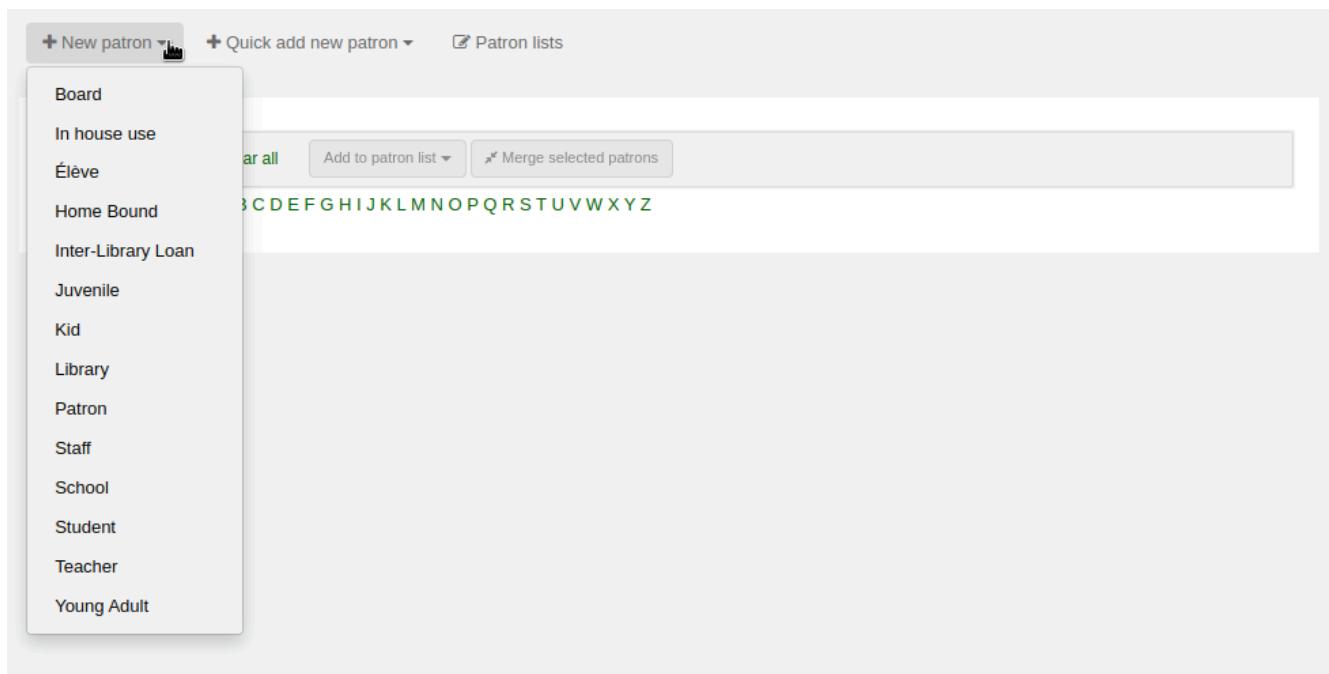
- *Get there:* Patrons

### Note

Only staff with the [edit\\_borrowers permission](#) (or the [superlibrarian permission](#)) will be able to add patrons.

Once there you can add a new patron.

- Click ‘New patron’



### Note

The fields that appear on the patron add form can be controlled by editing the [BorrowerUnwantedField](#) system preference.

### Note

Required fields are defined in the [BorrowerMandatoryField](#) system preference

- First, enter the identifying information regarding your patron

## Patron identity

Salutation:

Surname:  Required

First name:

Middle name:

Date of birth:  X  
(MM/DD/YYYY)

Initials:

Pronouns:

Other name:

Female  Male  Other  None specified

- ‘Salutation’ is populated by the [BorrowersTitles](#) system preference

### Note

If you’d like to prevent full names from printing on [slips](#) and you’re not using the Initials or Other name fields for anything else, you can use them for shortened versions of the name to then be printed on the slip.

For example:

Firstname: Nicole C.  
Surname: Engard  
Initials: NCE

Then on the slip you can have it print the <<borrowers.initials>> instead of the full name (NCE).

Or you could do something like this:

Firstname: Nicole  
Surname: Engard  
Initials: E

Then on the slip you can have it print the <<borrowers.initials>>, <<borrowers.firstname>> instead of the full name (E, Nicole).

- If this patron is a child, you will be asked to attach the child patron to an adult patron (guarantor)

## Patron guarantor

[+ Add guarantor](#)

## Non-patron guarantor

**Guarantor surname:**  Non-patron guarantor surname

**Guarantor first name:**  Non-patron guarantor first name

**Relationship:**

### Note

Guarantors can only be attached to patrons whose [category](#) has ‘Can be guarantee’ set to ‘Yes’.

### Note

This field can be made mandatory with the [ChildNeedsGuarantor](#) system preference.

- If the guarantor is a patron of the library, click ‘Add guarantor’ to search your system for an existing patron

Search for patron

Search:

Library:

Category:

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

- Click ‘Select’ to choose the patron

Showing 1 to 2 of 2 entries (filtered from 53 total entries)

Show 20 entries	< Previous	Next >	Search:	X	Import
Card	Name	Category	Library	Date of birth	Address
Card search	Name search	▼	▼	Date of birth search	Address search
23529000224510	Gaines, Joyce	Young Adult	Springfield	06/29/2007 (15 years)	6012 Library Rd. Springfield, MA 44224  Springfield

Showing 1 to 2 of 2 entries (filtered from 53 total entries) < Previous Next >

Close

- The relationships are set using the [borrowerRelationship](#) system preference

### Patron guarantor

Guarantor: Virgil Glass (23529000591678)

Relationship:

father  
mother

+ Add guarantor

### Note

It is possible to add more than one guarantor to a patron account (both parents for example).

### Warning

A patron who is a guarantee cannot be a guarantor to someone else and vice versa.

- If the guarantor is not a patron, you can still add their information in the 'Non-patron guarantor' section.
- Next enter the main address and contact information

### Main address

Street number:

Street type:

Address:

Address 2:

City:

State:

ZIP/Postal code:

Country:

## Note

The street type drop-down menu is populated by the ROADTYPE [authorized values](#)

### Contact information

**Primary phone:**  Shows on transit slips

**Secondary phone:**

**Other phone:**

**Primary email:**  Shows on transit slips

**Secondary email:**

**Fax:**

**Main contact method:**

- For contact information, note that the primary phone number and primary email address are the ones that appear on notices and slips printed during circulation (receipts, transfer slips and hold slips). The primary email is also the one that overdue notices and other messages go to.
- The ‘Main contact method’ can be used in reports and for staff to know which method to use first when trying to contact the patron.
- You can also record an alternate address for each patron. This could be used in an academic setting to store the patron’s home address for example.

### Alternate address

**Street number:**

**Street type:**

**Address:**

**Address 2:**

**City:**

**State:**

**ZIP/Postal code:**

**Country:**

**Phone:**

**Email:**

**Contact note:**

- Each patron can have an alternate contact. An alternate contact could be a parent or guardian, for example.

## Alternate contact

Surname:	<input type="text"/>
First name:	<input type="text"/>
Address:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
ZIP/Postal code:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>

- The library management section includes values that are used within the library

## Library management

Card number:	<input type="text"/> <span style="color:red">Required</span>
Card number must be between 1 and 32 characters.	
Library:	<input type="text" value="Centerville"/> <span style="color:red">Required</span>
Category:	<input type="text" value="Staff"/> <span style="color:red">Required</span>
Sort 1:	<input type="text"/>
Sort 2:	<input type="text"/>
Allow auto-renewal of items: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Protected: <input type="radio"/> Yes <input checked="" type="radio"/> No	

- The card number field is automatically calculated if you have the [autoMemberNum](#) system preference set that way

### Note

For a newly installed system, this preference will start at 1 and increment by 1 each time after. To have it start with the starting number of your barcodes, enter the first barcode by hand in the patron record and save the patron. After that, the field will increment that number by 1.

- If you accidentally chose the wrong patron category at the beginning you can fix that here
  - You can create drop-down menus for these fields by adding values in the Bsort1 and Bsort2 [authorized values categories](#)
- ‘Allow auto-renewal of items’ is used to control whether this patron’s checkouts will be renewed according to the circulation rules. If set to ‘Yes’, items for which automatic renewal is enabled in the circulation rules will be automatically renewed. This requires the [automatic\\_renewal cronjob](#) to run daily. If set to ‘No’, items for which automatic renewal is enabled in the circulation rules will not be automatically renewed.
- Protected: protected patrons cannot be deleted either manually or by batch. Use this for system patrons such as [statistical patrons](#), [SIP2 patrons](#), the [self checkout user](#), or superadmins.

### Version

The ‘Protected’ option was added in version 23.11 of Koha.

- ‘Check for previous checkouts’ is used to set the patron’s personal preference regarding checking their circulation history to see if they have borrowed This item in the past. This overrides the setting of the [patron category](#) and of the [CheckPrevCheckout](#) system preference.
- Preferred language for notices: if [TranslateNotices](#) is set to allow, you will be able to choose among the installed languages the language in which the patron would prefer to receive notices (such as overdue notices and advanced notices).
- Next, the library set-up section includes additional library settings

The screenshot shows the 'Library setup' section of the Koha interface. It includes fields for 'Registration date' (set to 01/30/2023), 'Expiry date (leave blank for auto calc.)' (with a calendar icon), 'OPAC note' (a large text area), and 'Circulation note' (another large text area). Below the OPAC note is a message: 'This message appears on this patron's user page in the OPAC'. Below the Circulation note is a message: 'This message displays when checking out to this patron'.

### OPAC/Staff interface login

Fields for 'Username' and 'Password' are present, along with a note: 'Minimum password length: 8'. A 'Confirm password' field is also shown.

- The registration date will automatically be filled in with today’s date
- The expiry date will automatically be calculated based on your [patron category settings](#)
- The OPAC note is a note for the patron, it will appear in the patron’s online account on the OPAC

The screenshot shows the 'Your summary' page for a patron named Edna Acosta. It features a 'Important links' sidebar with links to 'Koha Community Website' and 'Koha Wiki'. A 'Messages for you' box contains the message: 'This is an OPAC note'. Below this is a greeting: 'Hello, Edna Acosta' and a link: 'Click here if you're not Edna Acosta'. At the bottom left is a 'your summary' button.

## Note

See also [OPAC messages](#)

- The Circulation note is meant solely for your library staff and will appear when the circulation staff goes to check an item out to the patron

The screenshot shows a 'Checkouts' interface. At the top, it says 'Checking out to Henry Acevedo (23529000035676)'. Below this is a field labeled 'Enter item barcode' with a barcode scanner icon, and a yellow 'Check out' button. To the right, there's a 'Notes' section with a red note: 'Has permission to check out books for students.' Below that is a 'Messages' section with a link to 'Add a new message'.

- The 'OPAC/Staff interface login' section asks for the username and password to be used by the patron (or staff member) to log into their account in the OPAC and for staff to log in to the staff interface.
  - Staff will only be able to use this login information to log in to the staff interface if they have at least the [catalogue permission](#).
- If you have enabled the housebound module (with the [HouseboundModule](#) system preference), you will be able to choose a [housebound role](#) for this patron.

The screenshot shows a 'Housebound roles' section. It contains two sets of radio buttons: 'Chooser: Yes' (radio button is not selected) and 'No' (radio button is selected), and 'Deliverer: Yes' (radio button is not selected) and 'No' (radio button is selected).

- If you have set [additional patron attributes](#) in the administration module, these will appear next

The screenshot shows an 'Additional attributes and identifiers' section. It includes:

- A 'Department:' dropdown menu with a 'Clear' button.
- A 'Show barcode on patron' dropdown menu with a 'Clear' button.
- An 'Employee #' text input field with a 'Clear' button.

- Finally, if you have the [EnhancedMessagingPreferences](#) system preference set to 'allow,' you can choose the messaging preferences for this patron.

## Patron messaging preferences

	Days in advance	Email	Digests only <small>?</small>
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	<input type="button" value="0"/> <input type="button" value="▼"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	-
Item check-in	-	<input type="checkbox"/>	-
Item checkout	-	<input type="checkbox"/>	-
Interlibrary loan ready	-	<input type="checkbox"/>	-
Interlibrary loan unavailable	-	<input type="checkbox"/>	-
Hold reminder	-	<input type="checkbox"/>	-
Interlibrary loan updated	-	<input type="checkbox"/>	-

See the definition of each notice in the [advance notices and hold notices](#) section

### Warning

These preferences will override any you set via the [patron categories](#)

### Warning

These preferences can be altered by the patron via the OPAC if the [EnhancedMessagingPreferencesOPAC](#) system preference is set to 'show'.

- Once finished, click 'Save'

If the system suspects this patron is a duplicate of another it will warn you.

#### Duplicate patron record?

 [View existing record](#)

 [It is a duplicate. Edit existing record](#)

 [Not a duplicate. Save as new record](#)

### Note

See the [PatronDuplicateMatchingAddFields](#) system preference to see or change which fields are used to detect duplicate patrons. The default is the surname, the firstname and the date of birth.

If you have set a minimum or upper age limit on the patron category and are requiring that the birth date be filled in, Koha will warn you if the patron you're adding is too old or young for the patron category you have selected:

The following fields are wrong. Please fix them.

- Patron's age is incorrect for their category. Ages allowed are 5-17.

If the patron's [category](#) has an enrollment fee, the fee will be charged to the patron's account when the account is created. You can then manage the charge in the patron's [accounting tab](#).

## Quick add a patron

If your circulation desk is very busy and you want to register patron quickly, you can use the ‘quick add’ feature. It’s a shortened version of the add patron form with only a couple of necessary fields to fill out.

This feature uses two system preferences: [BorrowerMandatoryField](#) and [PatronQuickAddFields](#). These are the two system preferences that control which fields are in the quick add form.

To quick add a patron, go to the Patrons module

- *Get there:* Patrons

Click on the ‘Quick add new patron’ button.

You will be asked to choose a patron category.

Then, you will be presented with a shortened form.

**Add patron (Student)**

Show full form

Save Cancel

**Quick add**

Surname:  Required

Card number:  Required  
Card number must be between 1 and 32 characters.

Library:  Required

Category:  Required

Once the form is filled out, click on ‘Save’.

If you need to access the full form, you can click on ‘Show full form’ above the ‘Save’ button.

## Add a staff patron

All staff members must be entered into Koha as patrons of the ‘Staff’ type. Follow the steps in [Add a Patron](#) to add a staff member. To give the staff member permissions to access the staff interface, follow the steps in [patron permissions](#).

### Important

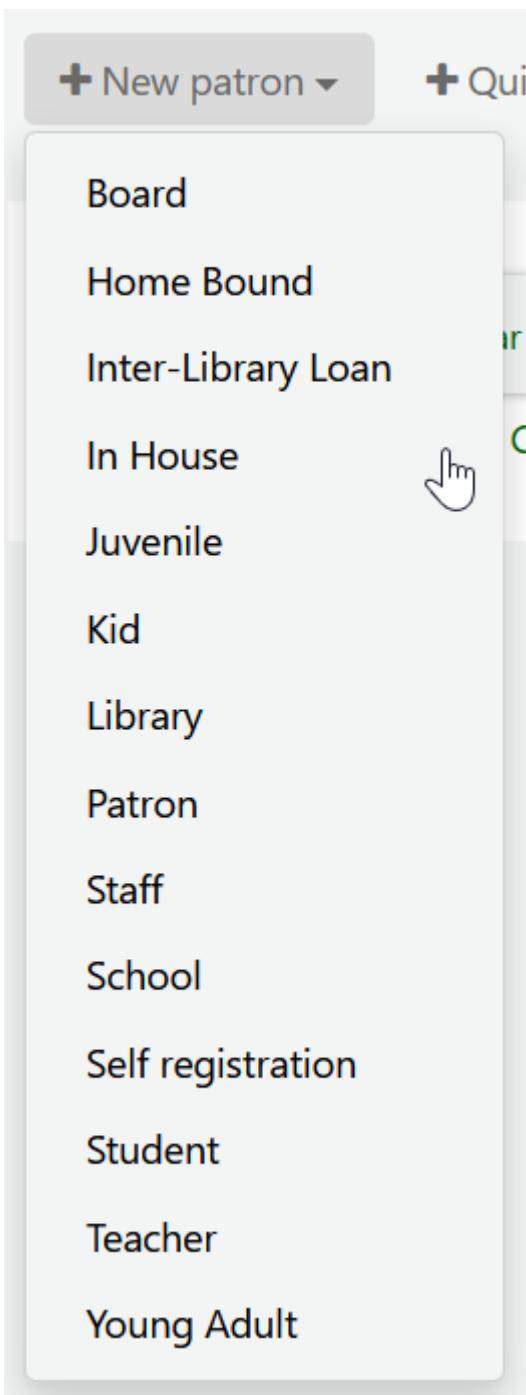
Remember to assign your staff secure usernames and passwords since these will be used to log into the staff client.

## Add a statistical patron

One way to track use of in house items is to “check out” the materials to a statistical patron. The “check out” process doesn’t check the book out, but instead tracks an in house use of the item. To use this method for tracking in house use you first will need a [patron category](#) set up for your statistical patron.

INHS	In House	Statistical	999 months	0 years	0 years	0.00	No	0.00	none	Edit	Delete
------	----------	-------------	------------	---------	---------	------	----	------	------	------	--------

Next, you will need to create a new patron of the statistical type.



Next, follow the steps put forth in the '[Add a new patron](#)' section of this manual. Since this patron is not a real person, simply fill in the required fields, the correct library and nothing else.

To learn about other methods of tracking in house use visit the [tracking inhouse use](#) section of this manual.

## Duplicate a patron

Sometimes when you're adding a new family to your system you don't want to type the contact information over and over. Koha allows for you to duplicate a patron and change only the parts you want to (or need to) change.

- Open the patron you want to use as your base (the patron you want to duplicate information from)
- Click the 'Duplicate' button at the top of their record

- All of the fields with the exception of first name, card number, username and password have been duplicated. Fill in the missing pieces and click ‘Save’

## Duplicate patron Eva Dillon (23529000105040)

Save Cancel

### Patron identity

**Salutation:**

**Surname:** Dillon Required

**First name:**

**Middle name:**

**Date of birth:**  ×  
(MM/DD/YYYY)

- Note

Clicking in a field that is already populated with data will clear that field of all information (making it easier for you to type in something different)

- You will be brought to your new patron

Edit + Add guarantee Change password Duplicate Print Search to hold Add message More

### Bruno Dillon (23529000035699)

**Contact information**

8916 Library Rd.  
Springfield, MA 44224

**Library use**

<b>Card number:</b>	23529000035699
<b>Borrower number:</b>	64

## Adding patron images

You can add patron pictures to help identify patrons. To enable this feature, you must first set the [patronimages](#) system preference to ‘Allow’.

If the preference is set to ‘Allow’, you will see a placeholder image under the patron’s name on the left of the screen.

RonnieBallard (23529000139858)



[Edit](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [Schedule pickup](#) [More](#)

## RonnieBallard (23529000139858)

### Contact information

[Edit](#)

5730 Library Rd.  
Centerville, CA 44262  
**(212) 555-1212**  
Born: 1956-02-23 (67 years)  
No email stored  
Category: Teacher (T)  
Home library: Centerville  
Borrower number: 21  
Updated on 2023-03-13 15:39

5730 Library Rd.  
Centerville, CA 44262  
**Primary phone:** (212) 555-1212  
**Date of birth:** 1956-02-23 (67 years)  
**Gender:** Female  
**Show checkouts to guarantor** No  
**Show charges to guarantor** No

### Library use

[Edit](#)

**Card number:** 23529000139858  
**Borrower number:** 21  
**Category:** Teacher (T)  
**Registration date:** 1989-06-01  
**Expiration date:** 2099-12-31  
**Library:** Centerville  
**Privacy pref:** Default  
**Sort field 1:** Resident

Click the ‘Add’ button on the placeholder image.

## Patron photo

X

### Upload patron photo

Ronnie Ballard does not currently have an image available. To import an image for Ronnie Ballard, enter the name of an image file to upload.

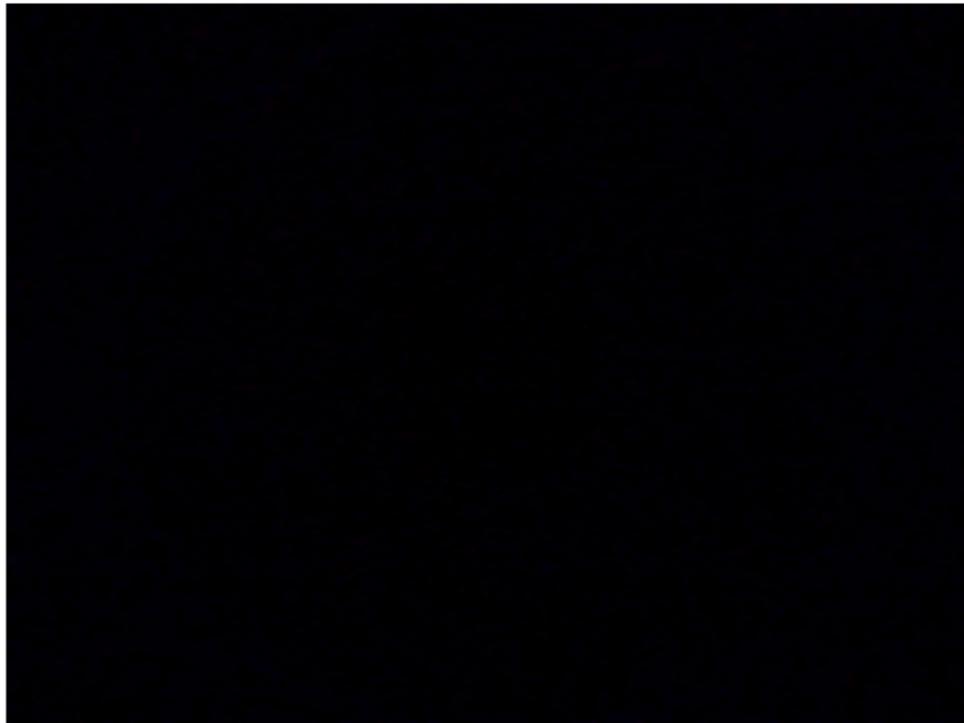
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:  No file chosen



### Take patron photo





You have the option of either uploading an existing picture from the computer or taking a picture with the webcam.

To upload an existing image, click ‘Browse’ or ‘Choose file’ to find the image on your computer and click ‘Upload’ to load the image in the patron’s file.

### Warning

There is a limit of 100K on the size of the picture uploaded and it is recommended that the image be 200x300 pixels, but smaller images will work as well.

To take a picture with the webcam, click the ‘Take photo’ button once the webcam is facing the patron. The system will take a picture and present it to you for review. If you are satisfied, click ‘Upload’. If not, click ‘Retake photo’ to take a new picture. You can also download the picture by clicking ‘Download photo’.

To add patron images in bulk, use the [Upload patron images](#) tool.

## Editing patrons

Patrons in Koha can be edited using one of many edit buttons.

### Note

Only staff with the [edit\\_borrowers permission](#) (or the [superlibrarian permission](#)) will be able to edit patron files.

- To edit the entire patron record simply click the ‘Edit’ button at the top of the patron record.

A screenshot of the Koha patron edit page. At the top, there is a horizontal menu bar with several options: 'Edit' (highlighted), '+ Add guarantee', 'Change password', 'Duplicate', 'Print', 'Search to hold', 'Add message', 'Schedule pickup', and 'More'. Below the menu, the patron's name 'Eva Dillon (23529000105040)' is displayed in a header bar.

- To edit a specific section of the patron record (for example the ‘Library use’ section) click the ‘Edit’ button beside the section.

A screenshot of the Koha patron edit page focusing on the ‘Library use’ section. The section contains the following fields:

<b>Card number:</b>	23529000035676
<b>Borrowernumber:</b>	19
<b>Category:</b>	Staff (S)
<b>Registration date:</b>	09/23/1990
<b>Expiration date:</b>	12/31/2099
<b>Library:</b>	Midway
<b>Sort field 1:</b>	0.36460167669188
<b>Sort field 2:</b>	0.33887459834933
<b>Username:</b>	23529000035676
<b>Password:</b>	*****
<b>Password expires:</b>	Never
<b>Protected:</b>	Yes
<b>Circulation note:</b>	This is a circulation note
<b>OPAC note:</b>	This is an OPAC note

Edit the patron’s file and click ‘Save’.

## Warning

Note that changing *your own* username will log you out of Koha.

## Modifying patron passwords

Patron passwords are not recoverable.

The stars on the patron details page next to the password label are always there even if a password isn't set.

If a patron forgets their password, the only option is to reset their password.

This can be done from the staff interface. To change the patron's password, click the 'Change password' button.

New username:

New password:

Confirm new password:

Koha cannot display existing passwords. Leave the field blank to leave password unchanged.  
Click to fill with a randomly generated suggestion. **Passwords will be displayed as text.**

**Save** **Cancel**

- Koha cannot display existing passwords as they are encrypted in the database. Leave the field blank to leave password unchanged.
- This form can automatically generate a random password if you click the link labeled "Click to fill with a randomly generated suggestion. Passwords will be displayed as text."

## Warning

Note that changing *your own* username here will log you out of Koha.

Changing the password through this form will also update the password expiry date, as set in the [patron category](#).

If the [NotifyPasswordChange](#) system preference is enabled, the patron will receive a notification indicating their password was changed.

## Note

The content of this email can be customized with the [Notices and slips tool](#). The code of the letter is `PASSWORD_CHANGE`.

If the [OpacResetPassword](#) system preference is enabled, or if the [patron category](#) allows it, you can also send a password reset email to the patron by clicking on 'More' and choosing 'Send password reset'.

Screenshot of a patron record interface showing a context menu and library details.

The top navigation bar includes: Edit, Change password, Duplicate, Print, Search to hold, Add message, Schedule pickup, and More.

The patron's name is Catherine Williamson (23529000179433).

Contact information:

- 5879 Library Rd.  
Springfield, MA 44224
- Primary phone: (212) 555-1212
- Date of birth: 29/06/2007 (15 years)
- Gender: Male
- Show checkouts: No

A context menu is open with the following options:

- Renew patron
- Set permissions
- Discharge
- Send welcome email
- Send password reset
- Delete
- Update child to adult patron
- Export today's checked in barcodes

Library details:

- 23529000179433
- 36
- Kid (K)
- 23/01/1985
- 31/12/2099
- Franklin

This will send a password reset email to the patron, similar to the one sent if they click on the '[Forgot your password?](#)' link on the OPAC. However, the reset link is set to expire after 5 days rather than 2 days when it is sent this way.

## Note

The content of the email can be customized with the [Notices and slips tool](#). The code of the letter is STAFF\_PASSWORD\_RESET.

Only staff members with the [superlibrarian permission](#) can see and change the password expiry date manually. This date can be changed by clicking the 'Edit' button at the top of the patron's record, or the 'Edit' button next to the 'Library use' section.

## Adding patron flags

[Restrictions](#) are used to prevent patrons from checking out.

Patrons can also be blocked from checking items out by setting patron flags.

Patron account flags

Setting a value here will prevent patron from circulating materials and placing holds on the OPAC

Gone no address:  Yes  No  
Lost card:  Yes  No

If you would like your circulation staff to confirm a patron's address before checking items out to the patron, set the 'Gone no address' flag. This will create a warning when checking out.

Cannot check out!

Attention

> **Address:** Patron's address flagged as in doubt

Messages

+ Add a new message

If the patron reports that they have lost their card you can set the 'Lost card' flag to prevent someone else from using that card to check items out.

Cannot check out!

Attention

**Lost:** Patron's card is flagged as lost

Messages

+ Add a new message

If you would like to bar a patron from the library you can add a manual restriction.

#### Patron restrictions

Patron is currently unrestricted.

#### Add manual restriction

Comment:

Expiration:  X Clear date

[Cancel](#)

#### Note

This is the same as the [restrictions tab](#) at the bottom of the patrons details page.

#### Note

A patron can automatically be restricted with the [Overdue/notice status triggers](#)

If you enter in a date and/or note related to the restriction, you will see that in the restricted message as well.

Cannot check out!

#### Attention

• Restricted since 18/05/2023: Patron's account is restricted until 31/05/2023 with the explanation:  
*Vandalism in study room 3*

[View restrictions](#) [Override restriction temporarily](#)

#### Messages

[+ Add a new message](#)

## Adding notes and messages to a patron record

You can leave notes in a patron record. There are several ways to do this: you can either add a circulation note or an internal message. These will not show in the OPAC for the patron to see. If you want the patron to see the notes and messages, use [OPAC notes](#) and [OPAC messages](#).

### Circulation notes

Circulation notes are added to the patron's file through the [add patron form](#) or the [edit patron form](#), in the 'Library set-up' section.

## Library setup

**Registration date:**  

(MM/DD/YYYY)

**Expiry date (leave blank for auto calc):**  

(MM/DD/YYYY)

**OPAC note:**

This message appears on this patron's user page in the OPAC

**Circulation note:**

This message displays when checking out to this patron

## OPAC/Staff interface login

**Username:**

**Password:**

Minimum password length: 8

**Confirm password:**

In the staff interface, circulation notes will be in the 'Library use' section of the patron's file.

### Library use



**Card number:** 23529000035676

**Borrower number:** 19

**Category:** Staff (S)

**Registration date:** 09/23/1990

**Expiration date:** 12/31/2099

**Library:** Midway

**Sort field 1:** 0.36460167669188

**Sort field 2:** 0.33887459834933

**Username:** 23529000035676

**Password:** \*\*\*\*\*

**Password expires:** Never

**Protected:** Yes

**Circulation note:**

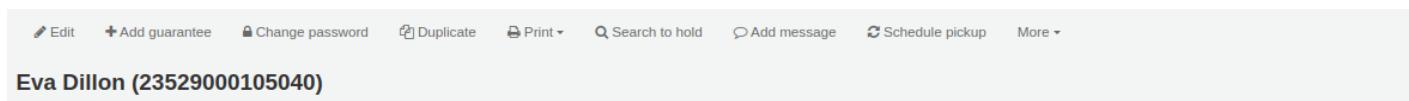
This is a circulation note

**OPAC note:**

This is an OPAC note

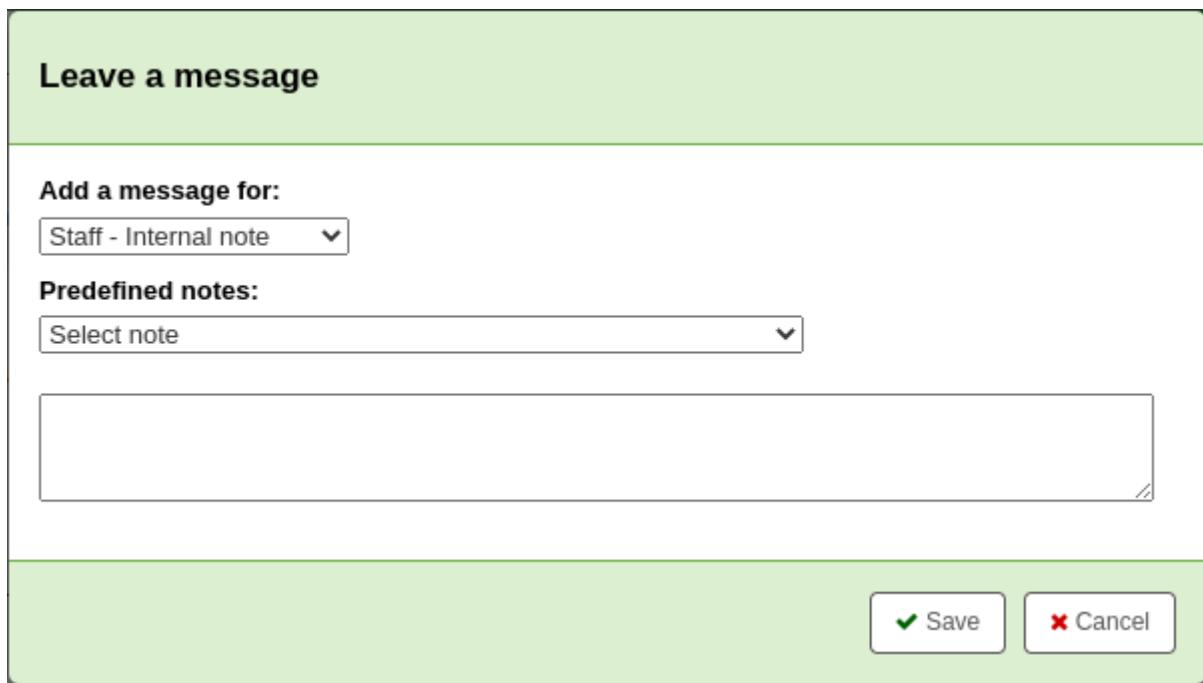
## Circulation messages

Internal messages are added to the patron's file using the 'Add message' button.



The screenshot shows the 'Edit' tab selected for a patron named Eva Dillon (23529000105040). At the top, there are several action buttons: 'Add guarantee', 'Change password', 'Duplicate', 'Print', 'Search to hold', 'Add message' (which is highlighted in yellow), 'Schedule pickup', and 'More'. Below the header, the patron's name and ID are displayed. A large green box contains the 'Leave a message' form. The form includes fields for 'Add a message for:' (set to 'Staff - Internal note'), 'Predefined notes:' (a dropdown menu set to 'Select note'), and a large text area for the message content. At the bottom right are 'Save' and 'Cancel' buttons.

To leave an internal message, choose "Staff - Internal note" in the 'Add a message for' field. Enter your message in the box, or choose a predefined message in the drop-down menu.

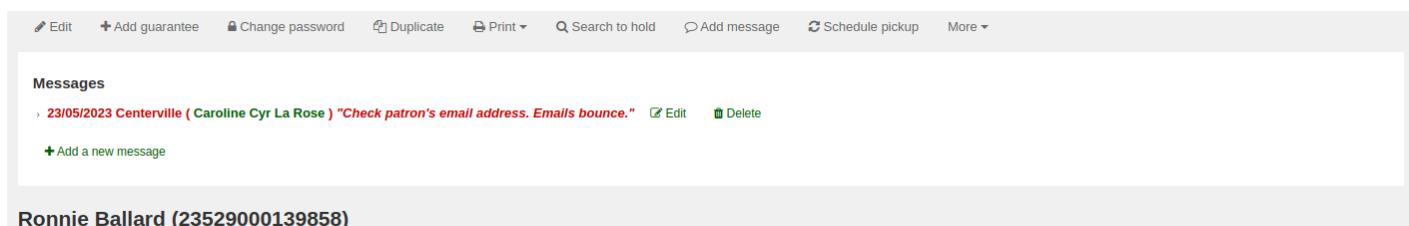


The screenshot shows the 'Leave a message' form. It has a green header bar with the title 'Leave a message'. Below it is a white form area. The first section is 'Add a message for:' with a dropdown menu set to 'Staff - Internal note'. The second section is 'Predefined notes:' with a dropdown menu set to 'Select note'. There is a large text area for the message content. At the bottom right are 'Save' and 'Cancel' buttons.

### Note

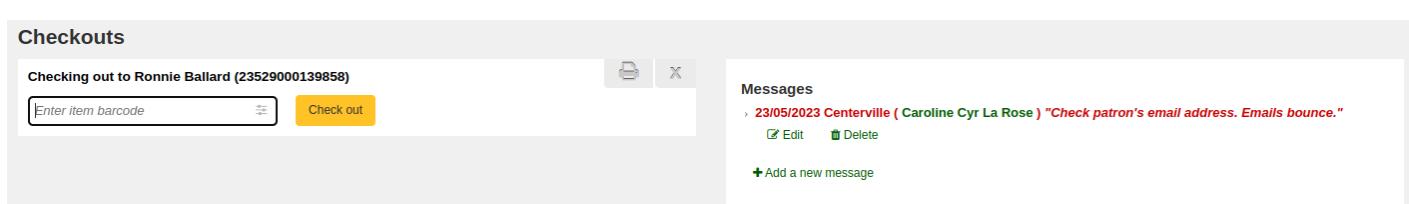
Predefined messages are added in the BOR\_NOTES [authorized value category](#).

Once saved, the internal message is shown in bold red on the patron's detail page in the staff interface, at the top of the page just under the row of action buttons.



The screenshot shows the 'Edit' tab selected for a patron named Ronnie Ballard (23529000139858). At the top, there are several action buttons: 'Add guarantee', 'Change password', 'Duplicate', 'Print', 'Search to hold', 'Add message' (highlighted in yellow), 'Schedule pickup', and 'More'. Below the header, the patron's name and ID are displayed. A green box labeled 'Messages' contains a single entry: '23/05/2023 Centerville ( Caroline Cyr La Rose ) "Check patron's email address. Emails bounce."'. To the right of the message are 'Edit' and 'Delete' buttons. At the bottom left is a '+ Add a new message' link.

It will also appear on the checkout page, to the right of the checkout box.



The screenshot shows the 'Checkouts' tab selected for a patron named Ronnie Ballard (23529000139858). At the top, there are several action buttons: 'Enter item barcode' (with a barcode scanner icon) and 'Check out' (highlighted in yellow). Below the header, the patron's name and ID are displayed. A green box labeled 'Messages' contains a single entry: '23/05/2023 Centerville ( Caroline Cyr La Rose ) "Check patron's email address. Emails bounce."'. To the right of the message are 'Edit' and 'Delete' buttons. At the bottom left is a '+ Add a new message' link.

If you need to edit the message, click the 'Edit' button next to the message, edit the text and click 'Save'.

## Changing children to adults

Children patrons do not become adults automatically in Koha unless the [update patron categories](#) cron job is running.

To upgrade a child patron to an adult patron category manually go to the ‘More’ menu and choose ‘Update child to adult patron’.

The screenshot shows a patron record for 'Catherine Williamson (23529000179433)'. The 'More' menu is open, displaying various options: Renew patron, Set permissions, Discharge, Send welcome email, Send password reset, Delete, Update child to adult patron, and Export today's checked in barcodes. The 'Update child to adult patron' option is highlighted. To the right of the menu, there is a list of patron details: 23529000179433, 36, Kid (K), 23/01/1985, 31/12/2009, and Franklin. Below the menu, the 'Library:' field is set to 'Franklin'.

You will then be presented with a pop up window asking which one of your adult patron categories this child should be updated to.

The modal dialog is titled 'Choose adult category'. It contains a table with three rows, each with a radio button and a code/description pair: HB (Home Bound), PT (Patron), and ST (Student). At the bottom are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a yellow background.

	Code	Description
<input type="radio"/>	HB	<b>Home Bound</b>
<input type="radio"/>	PT	<b>Patron</b>
<input type="radio"/>	ST	<b>Student</b>

## Note

This list shows the [patron categories](#) that have the category type ‘adult’.

## Renew patron account

When renewing a patron account you can either edit the expiry date manually in the patron record or use the ‘Renew patron’ option from the More menu in the toolbar at the top.

The screenshot shows a user interface for managing a patron account. At the top, there are buttons for 'Add message', 'Schedule pickup', and 'More'. A 'More' button is expanded to show a dropdown menu with the following options: 'Renew patron', 'Set permissions', 'Send welcome email', 'Delete', 'Update child to adult patron', and 'Export today's checked in barcodes'. Below the dropdown menu, the word 'Library use' is displayed in bold. To the left of 'Library use', there is an 'Edit' button.

Using the latter the new expiry date will be calculated using the enrollment period configured for the patron category of the user. The system preference [BorrowerRenewalPeriodBase](#) determines if the new expiry date will be calculated from the current date or from the old expiry date.

One advantage of using the ‘Renew patron’ option is that it will be logged as a membership renewal in the action\_logs table and be visible as such when using the [Log viewer](#) or the [Modificaton log](#) from the patron account.

The renewal date of the patron account will be visible on the details tab.

The screenshot shows a 'Library use' details page for a patron account. The page includes the following fields:

<b>Card number:</b>	A001
<b>Borrower number:</b>	7
<b>Category:</b>	Adulte (ADULT)
<b>Registration date:</b>	
<b>Renewal date:</b>	14/02/2024
<b>Expiration date:</b>	14/05/2032
<b>Library:</b>	Mediatheque centrale
<b>Username:</b>	mdupont

To the right of the details table, there is an 'Edit' button.

If the patron is in a [patron category](#) with a membership fee, the charge will also be added upon renewal. You can then manage the charge in the patron’s [accounting tab](#).

## Deleting a patron account

From the ‘More’ drop-down, the patron account can be deleted.

**Shannon Stuart (23529000395609)**

<b>Contact information</b>		<input type="button" value="Edit"/>	<b>Library use</b>	<input type="button" value="Renew patron"/> <input type="button" value="Set permissions"/> <b>Delete</b>  <input type="button" value="Update child to adult patron"/> <input type="button" value="Export today's checked in barcodes"/>
			<b>Card number:</b> <b>Borrower number:</b> 44 <b>Category:</b> Patron (PT)	
<b>Primary phone:</b> (212) 555-1212				

## Note

Only staff with the [delete\\_borrowers permission](#) (or the [superlibrarian permission](#)) will be able to delete patrons.

There will be an alert if the patron has checkouts, holds, fines or credits.

- If a patron has current checkouts, the deletion will not be possible.

**Cannot delete patron**  
• Patron has 1 item(s) checked out.

- If a patron has outstanding fines, the deletion will not be possible.

**Cannot delete patron**  
• Patron has 20.00 in fines.

- If a patron has unused credits, the option to delete the patron is possible but there will be a warning.

• Patron has a 2.00 credit.  
**Are you sure you want to delete the patron Ruben Harper? This cannot be undone.**

- If a patron has existing holds on their account, the option to delete the patron is possible. The hold will be cancelled and moved to the old\_reserves table.

**Patron has 1 hold(s). Deleting patron cancels all their holds.**  
**Are you sure you want to delete the patron training? This cannot be undone.**

- If a patron has public or shared [lists](#), those will be deleted along with the patron, unless the [ListOwnershipUponPatronDeletion](#) system preference is set to 'change owner of these lists'.

- If a patron is protected, the ‘Delete’ option will be disabled. To delete the patron anyway, [edit the patron](#) and choose ‘No’ under ‘Protected’ in the ‘Library management’ section, save, and then delete.

The screenshot shows a patron record for "Henry Acevedo (23529000035676)". A context menu is open over the patron's name, with a tooltip "Patron is protected". The menu includes options: Renew patron, Set permissions, Send welcome email, Delete (disabled), Update child to adult patron, and Export today's checked in barcodes. Below the menu, the patron's details are listed: 23529000035676, 19, Staff (S). On the right, there are edit links for registration and expiration dates.

## Managing patron self edits

If you are allowing patrons to edit their accounts via the OPAC with the [OPACPatronDetails](#) preference then you will need to approve all changes via the staff interface before they’re applied. If there are patron edits awaiting action they will appear on the staff interface dashboard below the modules list (along with other items awaiting action).

**Suggestions pending approval: 1**

**Comments pending approval: 1**

**Tags pending approval: 1**

**Patrons requesting modifications: 1**

### Note

Superlibrarians will see modifications for any branch, other staff will only see modifications for patrons who belong to their logged in branch.

When you click the ‘Patrons requesting modifications’ link you will be brought to a list of patrons with requested changes.

## Update patron records

### Engard, Nicole (Nicole's Library) (12345674223)

[View record](#)

Approve  Deny  Ignore | [Patron details](#)

Field	From	To
Country		USA
First name	Nicole	Nicole C.
Primary phone	555.555.5555	555.555.5556
Sex		F

[Submit](#)

From here you can ‘Approve’ and apply the changes to the patron record, ‘Delete’ and remove the changes or ‘Ignore’ and keep the changes pending to review later.

If you would like to see the entire patron record you can click the ‘Patron details’ links to the right of the buttons. This will open in a new tab.

# Merging patron records

If you accidentally end up with one patron with two cards it is possible to merge their records together so that you don't lose their loan history or holds.

- In the patron list, check the boxes next to the records you want to merge and click on the 'Merge selected patrons' button.

The screenshot shows a search results page titled 'Patrons found for: Standard containing 'anderson''. There are two records listed:

Card	Name	Date of birth	Category	Library	Expires on	OD/Checkouts	Fines	Circ note	Action
14140275	Anderson, Thomas 732 Parkway		Student (A)	Bibliothèque	01/01/2020	1 / 2	0.00		<input type="button" value="Edit"/>
5476673	Anderson, Thomas A. 732 Parkway		Student (A)	Bibliothèque	30/06/2020	0 / 0	0.00		<input type="button" value="Edit"/>

## Note

It is possible to merge more than two records at a time.

- Select the patron record you want to keep

## Merge patron records

Select patron to keep. Data from the other patrons will be transferred to this patron record and the remaining patron records will be deleted.

	Card	Name	Date of birth	Category	Library	Expires on
<input type="radio"/>	14140275	Thomas Anderson (14140275)		Student (STUDENT)	Bibliothèque	01/01/2020
<input checked="" type="radio"/>	5476673	Thomas A. Anderson (5476673)		Student (STUDENT)	Bibliothèque	30/06/2020

- If necessary, click the 'Compare patrons' button to see the differences between the different accounts.

The dialog box shows a comparison between two patron records:

Name:	Cherry, Lillie	Lillie, Cherry
Initials:	L	L
Other name:	-	-
Library:	MPL	CPL
Card number:	23529000299603	235290001223643
Category:	PT	PT
Address line 1:	263 Library Rd.	263 Library Rd.
Address line 2:	-	-
City:	Springfield, MA	Springfield, MA
State:	-	-
ZIP/Postal code:	44224	44224
Country:	-	-
Registration date:	1993-03-19	2022-02-10
Renewal date:	-	-
Expiration date:	2099-12-31	2030-05-10
Date of birth:	1931-01-19	-
Restricted:	-	-
Primary email:	-	-
Secondary email:	-	-
Primary phone:	(212) 555-1212	(212) 555-1212
Secondary phone:	-	-
Other phone:	-	-
Gender:	F	-
Updated on:	2022-01-17 14:34:31	2022-02-10 17:45:53
Username:	23529000299603	cherry_lillie

- Click the 'Merge patrons' button.

The checkouts and statistics will be transferred to the right record and the other one will be deleted.

## Merge patron records

### Results

Patron records merged into Thomas A. Anderson (5476673)

#### Thomas Anderson (14140275)

2 extended patron attributes transferred.

2 checkouts transferred.

3 statistics transferred.

[View patron record](#)

## Patron permissions

Patron permissions are used to allow staff members access to the staff interface.

### Important

In order for a staff member to log into the staff interface they must have (at the very least) the [catalogue permission](#) which allows them to view the staff interface.

## Setting patron permissions

### Note

Only staff with the [permissions permission](#) (or the [superlibrarian permission](#)) will be able to set permissions for other staff members.

In addition to the [permissions permission](#), only staff with the [staffaccess permission](#) will be able to set permission for other staff members whose [category](#) is of the ‘staff’ type.

- On the patron record, click ‘More’ and choose ‘Set permissions’ to alter the patron’s permissions.

The screenshot shows a patron record for Henry Acevedo (23529000035676). The top navigation bar includes links for Edit, Change password, Duplicate, Print, Search to hold, Add message, and More. The 'More' dropdown menu is open, displaying options: Renew patron, Set permissions (which is highlighted), Send welcome email, Delete, Update child to adult patron, and Export today's checked in barcodes. The 'Edit' link next to 'Send welcome email' is also highlighted. The main content area displays contact information (4345 Library Rd., Springfield, MA 44224), primary phone number (212) 555-1212, date of birth (05/30/1958, 65 years), gender (Female), and two checkboxes for 'Show checkouts to guarantor' and 'Show charges to guarantor', both of which are set to 'No'.

- You will be presented with a list of preferences, some of which can be expanded by clicking the ‘Show details’ link on the right title.

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<input type="button" value="Show all"/>	<input type="button" value="Hide all"/>	<input checked="" type="checkbox"/> Select all	<input type="button" value="Clear all"/>	Filter: <input type="text"/>
<b><input type="checkbox"/> Access to all librarian functions (superlibrarian)</b>						
This permission grants access to all areas. If selected, specific sub-permissions cannot be selected.						
<input type="checkbox"/> Check out and check in items (circulate)					 Show details	
<input type="checkbox"/> Staff access, allows viewing of catalogue in staff interface (catalogue)					Required for staff login.	
<input type="checkbox"/> Manage Koha system settings (Administration panel) (parameters)					 Show details	
<input type="checkbox"/> Add, modify and view patron information (borrowers)					 Show details	
<input type="checkbox"/> Set user permissions (permissions)						
<input type="checkbox"/> Place and modify holds for patrons (reserveforothers)					 Show details	
<input type="checkbox"/> Edit catalog (Modify bibliographic/holdings data) (editcatalogue)					 Show details	
<input type="checkbox"/> Manage patrons fines and fees (updatecharges)					 Show details	
<input type="checkbox"/> Acquisition management (acquisition)					 Show details	
<input type="checkbox"/> Suggestions management (suggestions)					 Show details	
<input type="checkbox"/> Use all tools (expand for granular tools permissions) (tools)					 Show details	
<input type="checkbox"/> Edit authorities (editauthorities)						
<input type="checkbox"/> Manage serial subscriptions (serials)					 Show details	
<input type="checkbox"/> Allow access to the reports module (reports)					 Show details	
<input type="checkbox"/> Allow staff members to modify permissions, usernames, and passwords for other staff members (staffaccess)						
<input type="checkbox"/> Course reserves (coursereserves)					 Show details	
<input type="checkbox"/> Koha plugins (plugins)					 Show details	
<input type="checkbox"/> Lists (lists)					 Show details	
<input type="checkbox"/> Patron clubs (clubs)					 Show details	
<input type="checkbox"/> Create and modify Interlibrary loan requests (ill)						
<input type="checkbox"/> Self check modules (self_check)					 Show details	
<input type="checkbox"/> Manage stockrotation operations (stockrotation)					 Show details	
<input type="checkbox"/> OPAC problem reports management (problem_reports)					 Show details	
<input type="checkbox"/> Recalls (recalls)					 Show details	
<input type="checkbox"/> Manage the electronic resources module (erm)						
<input type="checkbox"/> Allow staff to change logged in library (loggedinlibrary)						
<input type="checkbox"/> Manage the preservation module (preservation)						

- In all cases, if the parent permission is checked, the user has all the child permissions. If you want to set permissions on a more granular level, expand the section and only check the permissions you want that staff members to have.

## Patron permissions defined

This section describes the different permissions.

### Access to all librarian functions (superlibrarian)

This permission grants access to everything in the Koha staff interface.

The superlibrarian permission also gives access to things that might otherwise be restricted by system preferences for example.

## Note

With this permission selected, there is no need to choose any other permission.

### Check out and check in items (circulate)

The following permissions are used to give access to functions from the [circulation](#) module. Checking the circulate permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### Remaining circulation permissions (circulate\_remaining\_permissions)

This permission grants all circulation rights except those covered by permissions listed below.

#### Force checkout if a limitation exists (force\_checkout)

With this permission, a staff member will be allowed to override a check out restriction in the following cases:

- age restriction
- the item is issued to another patron
- the item is not for loan
- the patron has overdue items
- the patron is restricted
- the item is lost
- the item is a high demand item
- the item is on hold

#### Mark checkout notes as seen/not seen (manage\_checkout\_notes)

This permission allows staff to [manage the checkout notes](#) written by users through the OPAC.

#### Manage curbside pickups (manage\_curbside\_pickups)

This permission allows staff to manage [patron curbside pickup appointments](#).

#### Manage restrictions for accounts (manage\_restrictions)

This permission allows staff to lift a restriction that might be on the patron’s record, or [add a manual restriction](#).

## Note

Note that a staff member without manage\_restrictions but who has [force\\_checkout](#) will be able to temporarily override a patron’s restriction in order to check out an item to them.

### Execute overdue items report (overdues\_report)

This permission allows staff to run the overdues reports found under Circulation ([Overdues](#) and [Overdues with fines](#)).

## **Override blocked renewals (override\_renewals)**

This permission allows staff to override renewals restrictions.

Requires that the staff member also have [circulate\\_remaining\\_permissions](#).

## **Staff access, allows viewing the catalogue in staff interface (catalogue)**

### **Important**

This permission must be given to all staff members to allow them to log into the staff interface

This permission allows access to the staff interface, with the possibility of

- searching the catalogue ([simple search](#), [advanced search](#) and [item search](#))
- searching the authorities
- viewing the checkout history of a title (no patron information is shown)
- [creating private or public lists](#), [adding items to private lists and public lists](#), if the public list permission allows it, editing and deleting private lists
- using the [cart](#)
- viewing [course reserves](#)

## **Manage Koha system settings (Administration panel) (parameters)**

The following permissions are used to give access to various pages from the [administration module](#).

Checking the parameters permission will give access to all pages. Click ‘Show details’ to give access to specific pages only.

### **Manage account debit and credit types (manage\_accounts)**

This permission gives access to the [debit types](#) and [credit types](#) management sections.

### **Manage additional fields for baskets or subscriptions (manage\_additional\_fields)**

This permission gives access to the [additional fields](#) management sections.

### **Important**

This permission requires that the staff member also have the corresponding permission for the particular additional fields.

<b>Additional fields</b>	<b>Corresponding permission</b>
Order baskets (aqbasket)	Manage basket and order lines (order_manage)
Order lines (aqorders)	Manage basket and order lines (order_manage)
Invoices (aqinvoices)	Edit invoices (edit_invoices)

Additional fields	Corresponding permission
Subscriptions (subscription)	Edit an existing subscription (edit_subscription)
Account lines (credit) (accountlines:credit)	Remaining permissions for managing fines and fees (remaining_permissions)
Account lines (debit) (accountlines:debit)	Remaining permissions for managing fines and fees (remaining_permissions)

#### Manage audio alerts (manage\_audio\_alerts)

This permission gives access to the [audio alerts](#) management section.

#### Manage authorized value categories and authorized values (manage\_auth\_values)

This permission gives access to the [authorized values](#) management section.

#### Manage background jobs (manage\_background\_jobs)

This permission gives access to the [jobs management](#) section.

#### Add, edit and archive cash registers (manage\_cash\_registers)

This permission gives access to the [cash registers](#) management section.

#### Manage circulation rules (manage\_circ\_rules)

This permission gives access to the [circulation and fine rules](#) management section.

#### Manage circulation rules from any library (manage\_circ\_rules\_from\_any\_libraries)

This permission grants the right to manage circulation rules from any library.

If a staff member does not have this permission, but has the [manage\\_circ\\_rules](#) permission, they can only edit circulation rules from their own library.

#### Manage cities and towns (manage\_cities)

This permission gives access to the [cities and towns](#) management section.

#### Manage classification sources and filing rules (manage\_classifications)

This permission gives access to the [classification sources](#) management section.

#### Manage column configuration (manage\_column\_config)

This permission gives access to the [table settings](#) section.

## **Manage curbside pickups (manage\_curbside\_pickups)**

This permission gives access to the [curbside pickup](#) management section.

This section is used to manage the pickup slots and other curbside pickup parameters. Circulation staff who manage the actual pickups need the [manage\\_curbside\\_pickups permission](#) under [circulate](#).

## **Manage Did you mean? configuration (manage\_didyoumean)**

This permission gives access to the [Did you mean?](#) management section.

## **Manage authentication providers (manage\_identity\_providers)**

This permission gives access to the [identity providers](#) management section.

## **Manage item circulation alerts (manage\_item\_circ\_alerts)**

This permission gives access to the [item circulation alerts](#) management section.

## **Manage item search fields (manage\_item\_search\_fields)**

This permission gives access to the [item search fields](#) management section.

## **Manage item types (manage\_itemtypes)**

This permission gives access to the [item types](#) management section.

## **Manage keyboard shortcuts for the advanced cataloging editor (manage\_keyboard\_shortcuts)**

This permission gives access to the keyboard shortcuts management section.

## **Manage libraries and library groups (manage\_libraries)**

This permission gives access to the [libraries](#) and [library groups](#) management sections.

## **Manage Mana KB content sharing (manage\_mana)**

This permission gives access to the [share content with Mana KB](#) section.

## **Manage MARC bibliographic and authority frameworks and test them (manage\_marc\_frameworks)**

This permission gives access to the following sections:

- [MARC bibliographic framework](#)
- [Authority types](#)
- [Koha to MARC mapping](#)
- [MARC Bibliographic framework test](#)

## **Manage MARC overlay rules configuration (manage\_marc\_overlay\_rules)**

This permission gives access to the [record overlay rules](#) management section.

## **Manage record matching rules (manage\_matching\_rules)**

This permission gives access to the [record matching rules](#) management section.

#### **Manage OAI sets (manage\_oai\_sets)**

This permission gives access to the [OAI sets configuration](#) section.

#### **Manage extended patron attributes (manage\_patron\_attributes)**

This permission gives access to the [patron attribute types](#) management section.

#### **Manage patron categories (manage\_patron\_categories)**

This permission gives access to the [patron categories](#) management section.

#### **Manage patron restrictions (manage\_patron\_restrictions)**

This permission gives access to the [patron restriction types](#) management section.

#### **Manage record sources (manage\_record\_sources)**

This permission gives access to the [record sources](#) management section.

### **Version**

This permission, and the corresponding feature, were added in Koha in version 24.05.

#### **Manage search engine configuration (manage\_search\_engine\_config)**

This permission gives access to the [search engine configuration](#) section.

### **Note**

This section is only visible when the [SearchEngine](#) system preference is set to ‘Elasticsearch’.

#### **Manage saved search filters (manage\_search\_filters)**

This permission gives access to the [search filters](#) management section.

#### **Manage Z39.50 and SRU server configuration (manage\_search\_targets)**

This permission gives access to the [Z39.50/SRU servers](#) management section.

#### **Manage SMS cellular providers (manage\_sms\_providers)**

This permission gives access to the [SMS cellular providers](#) management section.

### **Note**

This section will only be visible when the [SMSendDriver](#) system preference is set to ‘Email’.

## **Manage SMTP servers (manage\_smtp\_servers)**

This permission gives access to the [SMTP servers](#) management section.

## **Manage system preferences (manage\_sysprefs)**

This permission gives access to the [system preferences](#).

## **Manage library transfer limits and transport cost matrix (manage\_transfers)**

This permission gives access to the [library transfer limits](#) and the [transport cost matrix](#) management sections.

## **Manage usage statistics settings (manage\_usage\_stats)**

This permission gives access to the [share your usage statistics](#) section.

## **Remaining system parameters permissions (parameters\_remaining\_permissions)**

This permission gives access to any remaining sections of the administration module not mentioned above.

## **Add, modify and view patron information (borrowers)**

The following permissions are used to give access to functions from the [patrons](#) module. Checking the borrowers permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### **Delete patrons (delete\_borrowers)**

This permission grants the ability to [delete patrons](#).

### **Add, modify and view patron information (edit\_borrowers)**

This permission gives access to the [patrons](#) module to search for and view patron files, as well as adding new patrons and editing existing patron.

### **Search, list and view patrons (list\_borrowers)**

This permission gives access to the [patrons](#) module to search for and view patron files.

## **Warning**

Staff members with this permissions, but without the [edit\\_borrowers permission](#) will be able to view patrons, but not add new patrons or edit existing patrons.

## **View patron information from any libraries (view\_borrower\_infos\_from\_any\_libraries)**

This permission grants the right to access patron files from any library.

If a staff member does not have this permission, but has the [edit\\_borrowers](#) permission, they can only view patrons from their own library or library group.

## **Set user permissions (permissions)**

This permission grants the ability to [set permissions](#) for other staff members.

## **Important**

Staff members with this permission will not be able to set permissions for patrons whose [category](#) is of the ‘staff’ type unless they also have the [staffaccess permission](#).

### **Place and modify holds for patrons (reserveforothers)**

The following permissions are used to give access to [holds](#) options. Checking the reserveforothers permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### **Modify holds priority (modify\_holds\_priority)**

This permission allows staff members to [alter the holds priority](#) (moving patrons up and down the queue).

#### **Place holds for patrons (place\_holds)**

This permission allows staff members to [place holds in the staff interface](#).

### **Edit catalog (Modify bibliographic/holdings data) (editcatalogue)**

The following permissions are used to give access to functions from the [cataloging](#) module. Checking the editcatalogue permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### **Use the advanced cataloging editor (advanced\_editor)**

This permission grants the ability to use the [advanced cataloging editor](#) in the [cataloging](#) module.

## **Important**

Staff members with this permission also need to have the [edit\\_catalogue permission](#).

#### **Create shared macros (create\_shared\_macros)**

This permission grants the ability to [create macros](#) to be used in the [advanced cataloging editor](#).

## **Important**

Staff members with this permission also need to have the [advanced\\_editor permission](#).

#### **Delete all items at once (delete\_all\_items)**

This permission grants the ability to use the ‘Delete all items’ option found under the ‘Edit’ menu in cataloging, to [delete all of a record’s items](#).

#### **Delete shared macros (delete\_shared\_macros)**

This permission grants the ability to [delete macros](#) from the [advanced cataloging editor](#).

## **Important**

Staff members with this permission also need to have the [advanced\\_editor permission](#).

#### **Edit any item including items that would otherwise be restricted (edit\_any\_item)**

This permission grants the ability to edit items belonging to libraries from other [library groups](#).

#### **Important**

Staff members with this permission also need to have the [edit\\_items permission](#).

#### **Edit catalog (Modify bibliographic/holdings data) (edit\_catalogue)**

This permission grants the ability to [add bibliographic records](#) (including importing records through z39.50/SRU, and [duplicating records](#)), [edit existing bibliographic records](#), [merge existing bibliographic records](#), and [delete bibliographic records](#).

#### **Edit items (edit\_items)**

This permission grants the ability to [add new items](#), [edit items](#), and [delete items](#), but not bibliographic records.

This permission also lets the staff member create and use [item templates](#), but the [manage\\_item\\_editor\\_templates permission](#) is required to manage item templates created by other staff members.

#### **Limit item modification to subfields defined in the [SubfieldsToAllowForRestrictedEditing](#) system preference (edit\_items\_restricted)**

This permission limits the ability to [edit items](#) to subfields specified in the [SubfieldsToAllowForRestrictedEditing](#) system preference.

#### **Important**

Staff members with this permission also need to have the [edit\\_items permission](#).

#### **Edit locked records (edit\_locked\_records)**

This permission grants the ability to edit records that come from locked [sources](#).

#### **Version**

This permission, and the corresponding feature, were added in Koha in version 24.05.

#### **Fast cataloging (fast\_cataloging)**

This permission grants the ability to catalog new records using the [fast cataloging](#) option found on the main circulation page and on the main cataloging page.

#### **Create, update and delete item editor templates owned by others (manage\_item\_editor\_templates)**

This permission grants the ability to manage [item templates](#) created by other users.

## Note

Anyone who has the [edit\\_items permission](#) can create and share item templates, and delete their own templates.

### Create, update and delete item groups, add or remove items from an item group (manage\_item\_groups)

This permission grants the ability to create, edit, and delete [item groups](#).

### Manage patrons fines and fees (updatecharges)

The following permissions are used to give access to functions from the [accounting tab](#) in the patron records. Checking the updatecharges permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### Discount debits for patrons (discount)

This permission grants the ability to apply discounts to charges.

## Important

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

#### Add manual credits to a patron account (manual\_credit)

This permission grants the ability to [add manual credits to a patron's account](#).

## Important

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

#### Add manual invoices to a patron account (manual\_invoice)

This permission grants the ability to [create manual invoices in a patron's account](#).

## Important

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

#### Payout credits to patrons (payout)

This permission grants the ability to reimburse credits to patrons.

## Important

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

## **Refund payments to patrons (refund)**

This permission grants the ability to refund payments that patrons have already made to the library.

### **Important**

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

## **Remaining permissions for managing fines and fees (remaining\_permissions)**

This permission grants the ability to manage fines and fees other than the actions described in the other sub-permissions (discounts, payouts, refunds, and writeoffs).

This includes, but is not limited to:

- the ability to access to the patrons' [accounting tab](#);
- the ability to [pay existing charges](#);
- the ability to [cancel charges](#);
- the ability to [void payments](#); and
- the ability to see the patron's transaction history.

## **Write off fines and fees (writeoff)**

This permission grants the ability to [write off patron fees](#).

### **Important**

Staff members with this permission also need to have the [remaining\\_permissions permission](#).

## **Acquisition management (acquisition)**

The following permissions are used to give access to functions from the [acquisitions](#) module. Checking the acquisition permission will give access to all functionalities. Click 'Show details' to give specific permissions.

### **Warning**

All the acquisitions sub-permissions give access to the acquisitions home page. That means that staff who have one or more of the following permissions will be able to view the budgets, search and view vendor information, and view invoices.

## **Add and delete funds (but can't modify funds) (budget\_add\_del)**

This permission grants the ability to [add funds](#) and delete funds within a budget.

### **Important**

Staff members with this permission also need to have the [budget\\_manage permission](#) and the [budget\\_modify permission](#).

### **Warning**

Without the [period\\_manage permission](#), staff members will only be able to add sub-funds, as they will not be able to access the budgets administration page to add first-level funds.

#### Manage funds (budget\_manage)

This permission grants the ability to access the [fund administration page](#).

Note that this only gives viewing access to the page, you will need to give your staff the [budget\\_add\\_del permission](#) and the [budget\\_modify permission](#) if you want them to be able to make changes to the funds.

#### Manage all funds (budget\_manage\_all)

This permission grants viewing access to all funds regardless of restrictions on them (owner, user or library restrictions).

#### Important

Staff members with this permission also need to have the [budget\\_manage permission](#).

#### Modify funds (can't create lines, but can modify existing ones) (budget\_modify)

This permission grants the ability to edit fund information and amounts.

#### Important

Staff members with this permission also need to have the [budget\\_manage permission](#) and the [budget\\_add\\_del permission](#).

#### Manage contracts (contracts\_manage)

This permission grants the ability to add, edit and delete [contracts with vendors](#).

#### Manage currencies and exchange rates (currencies\_manage)

This permission grants the ability to access the [Currencies and exchange rates](#) configuration page.

#### Delete baskets (delete\_baskets)

This permission grants the ability to delete [baskets](#).

#### Important

Staff members with this permission also need to have the [order\\_manage permission](#) to be able to view the baskets in order to delete them.

#### Delete invoices (delete\_invoices)

This permission grants the ability to delete [invoices](#).

#### Manage EDIFACT transmissions (edi\_manage)

This permission grants the ability to access the [EDI account](#) administration page, the [library EANs](#) administration page and access sent [EDI messages](#).

#### **Edit invoices (edit\_invoices)**

This permission grants the ability to edit invoices (modify invoice information such as the invoice number, billing or shipping date, add adjustments, etc.).

#### **Important**

Staff members with this permission will not be able to receive orders against an invoice unless they have the [order\\_receive permission](#) as well.

#### **Manage basket groups (group\_manage)**

This permission grants the ability to [create, edit, close and delete basket groups](#).

#### **Manage vendor issues (issue\_manage)**

This permission grants the ability to [create, edit, and delete vendor issues](#).

#### **Version**

This permission was introduced in version 23.11 of Koha.

#### **Merge invoices (merge\_invoices)**

This permission grants the ability to [merge invoices](#).

#### **Manage baskets and order lines (order\_manage)**

This permission grants the ability to [place orders](#), including [creating baskets](#), [adding order lines](#), [edit existing baskets](#), [closing baskets](#), etc.

#### **Important**

Staff members with this permission will not be able to [order from a new file](#) unless they also have the [stage\\_marc\\_import permission](#).

Likewise, staff members will not be able to [order from titles with highest hold ratios](#) unless they also have the [circulate\\_remaining\\_permissions permission](#).

#### **Manage all baskets and order lines, regardless of restrictions on them (order\_manage\_all)**

This permission grants the ability to manage all baskets and orders even if they are restricted to the owner, users or library.

#### **Important**

Staff members with this permission also need to have the [order\\_manage permission](#).

## **Receive orders and manage shipments (order\_receive)**

This permission grants the ability to create [invoices](#), [receive orders](#), and [claim late orders](#).

## **Manage budgets (period\_manage)**

This permission grants access to the [budget administration page](#) and the ability to create, duplicate, edit, and delete budgets.

### **Warning**

Without the [budget\\_manage permission](#), [budget\\_add\\_del permission](#), and the [budget\\_modify permission](#), staff will not be able to add or edit budget funds.

## **Manage budget plannings (planning\_manage)**

This permission grants the ability to access the [budget planning](#) page.

### **Important**

Staff members with this permission also need to have the [budget\\_manage permission](#), and the [period\\_manage permission](#).

## **Reopen closed invoices (reopen\_closed\_invoices)**

This permission grants the ability to reopen closed [invoices](#).

## **Manage vendors (vendors\_manage)**

This permission grants the ability to [add, edit, and delete vendors](#).

Note that vendors are used in the [acquisition module](#), the [serials module](#), and the [e-resource management module](#).

## **Suggestions management (suggestions)**

The following permissions are used to give access to [purchase suggestion management](#) functions of the [acquisitions](#) module. There is currently only one sub-permission. Checking either suggestions or [suggestion\\_manage](#) will have the same effect.

## **Manage purchase suggestions (suggestions\_manage)**

This permission grants the ability to [create and manage purchase suggestions](#), including creating new suggestions and changing the suggestions' statuses.

## **Use all tools (tools)**

The following permissions are used to give access to functions from the [tools](#) module, including some [cataloguing tools](#). Checking the tools permission will give access to all tools. Click 'Show details' to give access to specific tools.

## **Access to the files stored on the server (access\_files)**

This permission gives access to the [access files tool](#) to access files stored on the server.

**Perform batch extend due dates (batch\_extend\_due\_dates)**

This permission gives access to the [batch extend due dates tool](#).

**Upload patron images in batch or one at a time (batch\_upload\_patron\_images)**

This permission gives access to the [patron image upload tool](#).

**Delete old borrowers and anonymize circulation history (deletes borrower checkout history) (delete\_anonymize\_patrons)**

This permission gives access to the [batch patron deletion and anonymization tool](#).

**Write additional contents for the OPAC and staff interfaces (news and HTML customizations) (edit\_additional\_contents)**

This permission gives access to the [news tool](#), the [HTML customizations tool](#), and the [pages tool](#).

**Define days when the library is closed (edit\_calendar)**

This permission gives access to the [calendar tool](#).

**Set notice/status triggers for overdue items (edit\_notice\_status\_triggers)**

This permission gives access to the [overdue notice/status triggers tool](#).

**Define notices (edit\_notices)**

This permission gives access to the [notices and slips tool](#).

**Perform batch modification of patrons (edit\_patrons)**

This permission gives access to the [batch patron modification tool](#).

**Edit quotes for the quote-of-the-day feature (edit\_quotes)**

This permission gives access to the [quote editor](#) for the ‘Quote of the day’ feature.

**Export bibliographic and holdings data (export\_catalog)**

This permission gives access to the [export catalog data tool](#) from the [cataloging module](#)

**Important**

Staff members with this permission also need to have at least one of the [editcatalogue sub-permissions](#).

**Import patron data (import\_patrons)**

This permission gives access to the [import patrons tool](#).

**Perform inventory of your catalog (inventory)**

This permission gives access to the [inventory tool](#) from the [cataloging module](#).

#### **Perform batch deletion of items (items\_batchdel)**

This permission gives access to the [batch item deletion tool](#) from the [cataloging module](#).

#### **Perform batch modification of items (items\_batchmod)**

This permission gives access to the [batch item modification tool](#) and the [item modifications by age tool](#) from the [cataloging module](#).

**Limit batch item modification to subfields defined in the `SubfieldsToAllowForRestrictedBatchmod` preference (items\_batchmod\_restricted)**

This permission restricts the [batch item modification](#) tool to modify only the subfields defined in the [SubfieldsToAllowForRestrictedBatchmod](#) system preference.

#### **Important**

Staff members with this permission also need to have the [items\\_batchmod permission](#).

#### **Create printable labels and barcodes from catalog and patron data (label\_creator)**

This permission gives access to the [patron card creator tool](#), as well as the [label creator](#), the [barcode image generator tool](#), and the [quick spine label creator tool](#) from the [cataloging module](#).

#### **Manage CSV export profiles (manage\_csv\_profiles)**

This permission gives access to the [CSV profiles tool](#).

#### **Add, edit and delete patron lists and their contents (manage\_patron\_lists)**

This permission gives access to the [patron lists tool](#).

#### **Important**

Staff members with this permission also need to have the [list\\_borrowers permission](#) (and optionally the [view\\_borrower\\_infos\\_from\\_any\\_libraries permission](#)), otherwise, they will only be able to create lists and view existing lists, but not add patrons to the lists.

#### **Manage staged MARC records, including completing and reversing imports (manage\_staged\_marc)**

This permission gives access to the [manage staged MARC records tool](#) from the [cataloging module](#).

#### **Important**

Unless staff members with this permission also have the [stage\\_marc\\_import permission](#), they will only be able to manage records that have already been staged by someone else. This depends on your workflows.

#### **Manage MARC modification templates (marc\_modification\_templates)**

This permission gives access to the [MARC modification templates tool](#) from the [cataloging module](#).

#### **Moderate patron comments (moderate\_comments)**

This permission gives access to the [comments tool](#).

#### **Moderate patron tags (moderate\_tags)**

This permission gives access to the [tags tool](#).

#### **Perform batch deletion of records (bibliographic or authority) (records\_batchdel)**

This permission gives access to the [batch record deletion tool](#) from the [cataloging module](#).

#### **Perform batch modification of records (bibliographic or authorities) (records\_batchmod)**

This permission gives access to the [batch record modification tool](#) from the [cataloging module](#).

#### **Manage rotating collections (rotating\_collections)**

This permission gives access to the [rotating collections tool](#).

#### **Schedule tasks to run (schedule\_tasks)**

This permission gives access to the [task scheduler tool](#).

#### **Stage MARC records into the reservoir (stage\_marc\_import)**

This permission gives access to the [stage MARC records tool](#) from the [cataloging module](#).

### **Important**

Unless staff members with this permission also have the [manage\\_staged\\_marc\\_permission](#), they will only be able to stage records but not import them into the catalog. This depends on your workflows.

#### **Upload any file (upload\_general\_files)**

This permission gives access to the [upload tool](#) to upload files.

#### **Upload local cover images (upload\_local\_cover\_images)**

This permission gives access to the [upload local cover image tool](#) from the [cataloging module](#) to upload a batch of cover images, as well as the ability to [add local cover images from the record detail page](#) and [delete local cover images](#).

### **Note**

In order to [add cover images to items](#), staff members will also need the [edit\\_items permission](#).

#### **Manage uploaded files (upload\_manage)**

This permission gives access to files uploaded via the [upload tool](#).

## Important

Staff members with this permission also need to have the [upload\\_general\\_files](#) to access the [upload tool](#).

### Browse the system logs (view\_system\_logs)

This permission gives access to the [log\\_viewer tool](#), as well as the ‘Modification log’ tabs (in the [patron’s account](#), for example, or in the record details page).

## Edit authorities (editauthorities)

This permission grants the ability to create, edit, merge, and delete [authority records](#).

### Note

Staff with the [catalogue permission](#) will be able to [search authorities](#).

### Manage serial subscriptions (serials)

The following permissions are used to give access to functions from the [serials](#) module. Checking the serials permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### Note

Staff who have one or more of the following sub-permissions will be able to search for and view serial subscriptions, and [manage serial numbering patterns](#).

## Important

The serials permission is required to [manage serial frequencies](#).

### Note

Some staff may also need acquisitions permissions, such as the [vendors\\_manage\\_permission](#) since vendors for serials are managed in the acquisitions module.

### Check the expiration of a serial (check\_expiration)

This permission gives the ability to [check the expiration date of serials](#).

### Claim missing serials (claim\_serials)

This permission gives the ability to [claim missing issues](#).

### Create a new subscription (create\_subscription)

This permission gives the ability to [add new subscriptions](#).

### **Delete an existing subscription (delete\_subscription)**

This permission gives the ability to delete serial subscriptions.

### **Edit an existing subscription (edit\_subscription)**

This permission gives the ability to [edit existing serial subscriptions](#).

### **Serials receiving (receive\_serials)**

This permission gives the ability to [receive issues](#) of existing subscriptions.

### **Renew a subscription (renew\_subscription)**

This permission gives the ability to [renew serial subscriptions](#).

### **Routing (routing)**

This permission gives the ability to manage [routing lists](#).

### **Manage subscriptions from any branch (superserials)**

This permission is only useful if the [IndependentBranches](#) system preference is used.

### **Allow access to the reports module (reports)**

The following permissions are used to give access to functions from the [reports](#) module. Checking the reports permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### **Note**

Staff who have one or more of the following sub-permissions will be able to run reports in the [statistics wizard](#) section, as well as the other reports on the main reports page.

#### **Important**

Reports found on the [Circulation page](#) are not controlled by this permission.

### **Create SQL reports (create\_reports)**

This permission gives the ability to create [guided reports](#) or [SQL reports](#).

#### **Important**

Staff who need to run reports already created need the [execute\\_reports permission](#).

### **Delete SQL reports (delete\_reports)**

This permission gives the ability to delete saved [SQL reports](#).

## **Important**

Staff with this permission also need the [execute\\_reports permission](#).

### **Execute SQL reports (execute\_reports)**

This permission gives the ability to [run custom SQL reports](#), but not create or edit them.

### **Allow staff members to modify permissions, usernames, and passwords for other staff members (staffaccess)**

This permission gives the ability to modify [permissions](#), [passwords](#), and [usernames](#) of patrons who are staff members (patrons whose [category](#) is of the ‘staff’ type).

## **Important**

Staff with this permission also need the [edit\\_borrowers permission](#) and the [permissions permission](#).

### **Course reserves (coursereserves)**

The following permissions are used to give access to functions from the [course reserves module](#). Checking the coursereserves permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

## **Note**

If the [UseCourseReserves](#) system preference is not enabled, these permissions will not have any effect.

#### **Add course reserves (add\_reserves)**

This permission gives the ability to [add items to existing courses](#).

#### **Remove course reserves (delete\_reserves)**

This permission gives the ability to remove items from existing courses.

#### **Add, edit and delete courses (manage\_courses)**

This permission gives the ability to [create, edit and delete courses](#).

### **Koha plugins (plugins)**

The following permissions are used to give access to [plugins](#). Checking the plugins permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### **Use administrative plugins (admin)**

This permission gives the ability to use [administrative plugins](#).

#### **Configure plugins (configure)**

This permission gives the ability to run the ‘configure’ section of a plugin, if it has one.

### Note

Staff with this permission also need either the [report permission](#) or the [tool permission](#) in order to be able to access the plugins.

#### Manage plugins (manage)

This permission gives the ability to [install or uninstall plugins](#).

### Note

Staff with this permission also need either the [report permission](#) or the [tool permission](#) in order to be able to access the plugins.

#### Use report plugins (report)

This permission gives the ability to use [report plugins](#).

#### Use tool plugins (tool)

This permission gives the ability to use [tool plugins](#).

#### Lists (lists)

The following permissions are used to give access to public [list](#) management. Checking the lists permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### Important

All staff members have permission to create, modify and delete their own lists. These permissions are only necessary if you’d like to give a staff member permission to edit or delete public lists that they have not created.

#### Delete public lists (delete\_public\_lists)

This permission gives the ability to delete public lists created by someone else.

#### Edit public lists contents (edit\_public\_list\_contents)

This permission gives the ability to change the contents of public lists that have the “Permitted staff only” permission.

#### Edit public lists (edit\_public\_lists)

This permission gives the ability to edit the name, settings, and permissions of a public list owned by someone else.

### Note

This does not give the staff member permission to change the contents of the list, unless the list permissions allow them to.

## **Patron clubs (clubs)**

The following permissions are used to give access to the [patron clubs](#) functionalities. Checking the clubs permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### **Create and edit clubs (edit\_clubs)**

This permission gives the ability to [create and edit patron clubs](#) based on existing club templates using the [patron clubs tool](#).

### **Create and edit club templates (edit\_templates)**

This permission gives the ability to [create and edit club templates](#) using the [patron clubs tool](#).

### **Enroll patrons in clubs (enroll)**

This permission gives the ability to [enroll patrons](#) from the patron record in the staff interface.

#### **Note**

Staff with this permission also need either the [edit\\_borrowers permission](#) or the larger [borrowers permission](#) in order to be able to access the patron records to enroll them in clubs.

## **Create and modify interlibrary loan requests (ill)**

This permission gives access to the [interlibrary loan \(ILL\) module](#).

### **Self check modules (self\_check)**

The following permissions are used to enable the [self checkout](#) and the [self checkin](#) modules. Checking the self\_check permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

#### **Important**

These permissions should be given to a dedicated self check patron, not a regular staff patron.

### **Log into the self check-in module (self\_checkin\_module)**

This permission is used to enable the [self checkin](#) module. Give it only to a dedicated self check patron created for this purpose.

#### **Important**

This permission prevents the patron from using any other OPAC functionality.

## **Perform self checkout at the OPAC (self\_checkout\_module)**

This permission is used to enable the [self checkout](#) module. Give it only to a dedicated self check patron created for this purpose.

### **Note**

This permission should be used for the patron matching the [AutoSelfCheckID](#) system preference.

## **Manage stockrotation operations (stockrotation)**

The following permissions are used to give access to [stockrotation](#) management. Checking the stockrotation permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### **Add and remove items from rotas (manage\_rota\_items)**

This permission gives the ability to [manage the items in the rotas](#).

### **Create, edit and delete rotas (manage\_rotas)**

This permission gives the ability to [manage rotas](#).

## **Cash management (cash\_management)**

The following permissions are used to give access to the [point of sale](#) module and the [cash registers functionalities](#). Checking the cash\_management permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### **Perform anonymous refund actions (anonymous\_refund)**

This permission gives the ability to refund payments done through the point of sale from the [cash register transaction history](#).

### **Perform cash register cashup action (cashup)**

This permission gives the ability to record [cash register cashups](#).

### **Access the point of sale page and take payments (takepayment)**

This permission gives access to the [point of sale](#) module.

## **Recalls (recalls)**

The following permissions are used to give access to the [recalls](#) functionalities. Checking the recalls permission will give access to all functionalities. Click ‘Show details’ to give specific permissions.

### **Manage recalls for patrons (manage\_recalls)**

This permission gives access to the [recall management page](#).

## **Manage the electronic resources module (erm)**

This permission gives access to the [e-resource management module](#).

## Important

Staff members must have this permission in order to be attached as agreement and license users in agreement and license records.

### Allow staff to change logged in library (loggedinlibrary)

This permission gives the ability to change the library when [logging into the staff interface](#).

This permission also gives the ability to [set the library](#) in the staff interface.

#### Note

Staff members who do not have this permission will only be able to log into their home library.

### Manage the preservation module (preservation)

This permission gives access to the [preservation module](#).

#### Version

This permission was introduced in version 23.11 of Koha.

## Patron information

When viewing a patron record you have the option to view information from one of many tabs found on the left hand side of the record.

- *Get there:* Patrons > Browse or search for patron > Click patron name

## Check out

For instruction on checking items out, view the [Checking out](#) section of this manual.

Staff members can access their own check out screen by clicking their username in the top right of the staff client and choosing ‘My checkouts’

The screenshot shows the Koha staff client interface. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, and More. On the far right, it shows the user's name, "demo | East Branch". Below the navigation bar, the Koha logo is displayed. A search bar is present with the placeholder "Enter patron card number or partial name". Below the search bar are three buttons: "Check out" (highlighted in green), "Check in", and "Search the catalog". At the bottom of the screen, a breadcrumb trail shows the user has navigated from Home to Circulation to Checkouts to a specific patron record for "Joaquin D'Planque (312)". To the right of the main content area, a dropdown menu is open, listing several options: Set library, Search history, My account, My checkouts (which is highlighted in blue), and Log out.

## Details

#### Note

Staff members can access their own account details by clicking their username in the top right of the staff client and choosing ‘My account’

The screenshot shows the top navigation bar of the Staff Client. On the far left is a logo. To its right are links for 'Circulation', 'Patrons', 'Search', and 'More'. A dropdown arrow icon is next. On the far right, it says 'soutien Centerville' with a dropdown arrow, followed by 'Set library and cash register', 'My account' (which is highlighted in green), 'My checkouts', and 'Log out'.

All patron information will appear in the Details tab. This includes all the contact information, notes, custom patron attributes, messaging preferences, etc. entered when adding the patron.

The screenshot shows the 'Details' tab for a patron named Thomas A. Anderson (5476673). At the top, there's a toolbar with buttons for 'Edit', 'Change password', 'Duplicate', 'Print', 'Search to hold', 'Add message', and 'More'. Below this, a note says 'Fees & Charges: Patron has outstanding fees & charges of 5.25.' with buttons for 'Make payment' and 'Pay all fines'.

**Contact information:** Address: 732 Parkway, Los Angeles, CA. Date of birth: 09/06/1976 (42 years). Gender: Male.

**Housebound roles:** Chooser: Yes. Deliverer: No.

**Additional attributes and identifiers:** Degree: 4. Groupe tuteur: 402.

**Library use:** Card number: 5476673. Borrower number: 2413. Category: Student (STUDENT). Registration date: 07/05/2018. Expiration date: 30/06/2020. Library: Library. Show checkouts to guarantor: No. Username: thomasa.anderson. Password: \*\*\*\*\*.

**Patron messaging preferences:** A table showing messaging preferences for different events. The columns are Days in advance, Email, and Digests only. Items include: Item due (Days in advance: -, Email: checked, Digests only: checked); Advance notice (Days in advance: 0, Email: checked, Digests only: checked); Hold filled (Days in advance: -, Email: checked, Digests only: -); Item check-in (Days in advance: -, Email: checked, Digests only: -); Item checkout (Days in advance: -, Email: checked, Digests only: -).

**Checkouts:** 1 Checkout(s) (button). Other tabs include Fines & Charges, 2 Hold(s), 0 Article requests, Restrictions, Clubs (0/1). A button 'Show checkouts' is also present.

In the case of patrons who are marked as ‘Child’ or ‘Professional’ and their guarantors additional information will appear on their record.

- A child patron will list their guarantor

## Coda Engard (23529001223638)

123 My Street  
Austin TX 78741

**Primary phone:** 555.512.5555

**Primary email:** [coda@email.com](mailto:coda@email.com)

**Guarantor:** [Engard, Nicole](#)

[Edit](#)

- On the guarantor's record, all children and/or professionals will be listed

## Nicole Engard (23529001223637)

123 My Street  
Austin TX 78741

**Primary phone:** 555.512.5555

**Primary email:** [nicole@gmail.com](mailto:nicole@gmail.com)

**Guarantees:**

[Coda Engard](#)

[Edit](#)

If the age of the patron is outside the age range defined in their patron category a warning will appear on their record.



## Circulation summary

Below the patron's information on the details screen is a tabbed display of the items they have checked out, overdue, and on hold, among other things.

### Checkouts

The first tab shows the items the patron currently has checked out. The number of current checkouts will be displayed in the tab title.

Checkouts (3)	Relatives' checkouts (1)	Charges (-69.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (0)	Article requests (1)	Claims (0   0)	Restrictions (0)	Clubs (0/1)												
▶ Number of checkouts by item type																					
<a href="#">Due date</a>	<a href="#">Title</a>	<a href="#">Record-level item type</a>	<a href="#">Item type</a>	<a href="#">Collection</a>	<a href="#">Location</a>	<a href="#">Home library</a>	<a href="#">Checked out on</a>	<a href="#">Checked out from</a>	<a href="#">Call number</a>												
<a href="#">Renew select all   none</a>	<a href="#">Check in select all   none</a>		<a href="#">Copy number</a>	<a href="#">Charge</a>	<a href="#">Fine</a>	<a href="#">Price</a>			<a href="#">Return claims</a>												
<b>Today's checkouts</b>																					
06/06/2023	As You Like It by Shakespeare, William, 000520	Book	Book			Centerville	23/05/2023 11:01	Centerville	822.33 SHA		0.00	0.00	10.95	0 On hold (10 of 10 renewals remaining)	On hold	<a href="#">Claim returned</a>					
<b>Previous checkouts</b>																					
01/05/2023	A Florentine Tragedy; La Sainte Courtisane by Wilde, Oscar, 001183	Book	Book			Centerville	28/07/2022 13:53	Centerville			0.00	0.00	10.95	4 <input checked="" type="checkbox"/> (6 of 10 renewals remaining)	<input type="checkbox"/>	<a href="#">Claim returned</a>					
06/06/2023	The Tempest by Shakespeare, William, 000132	Book	Book			Centerville	01/03/2023 12:25	Centerville	822.33 SHA		0.00	2.00	10.95	2 <input type="checkbox"/> (8 of 10 renewals remaining)	<input type="checkbox"/>	<a href="#">Claim returned</a>					
										<b>Totals:</b>	<b>0.00</b>	<b>2.00</b>	<b>32.85</b>	<b>Renewal due date:</b> <input type="text"/> <input type="button" value="X"/>							
										Forgive fines on return: <input type="checkbox"/>											
<input checked="" type="checkbox"/> Always show checkouts immediately																					
Override renewal restrictions: <input type="checkbox"/> <input checked="" type="checkbox"/> Renew or check in selected items <input type="button" value="Renew all"/>																					

## Note

You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: issues-table, under Patrons).

Click ‘Configure’ at the top right of the table to access the administration module directly.

## Relatives' checkouts

If the patron has family at the library, staff can see what the other family members have checked out. The total number of checkouts among all family members will be displayed in the tab title.

### Your summary

Hello, Mary Burton

[Click here if you're not Mary Burton](#)

Checked out (3)	Relatives' checkouts	Overdue (1)	Charges (2,00)	Relatives' charges	Holds (1)	Recalls (1)	Article requests (1)
<input type="text"/> Search <input type="button" value="Clear filter"/> <input type="button" value="Copy"/> <input type="button" value="Print"/> <input type="button" value="CSV"/>							

Title	Due	Barcode	Call number	Relative
"I Have a Dream" Speech	07/26/2022	000922		Johnny Burton

## Note

You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: relatives-issues-table, under Patrons).

Click ‘Configure’ at the top right of the table to access the administration module directly.

## Charges

The Charges tab will only show in the patron accounts that have unpaid amounts or unused credits. The total amount of unpaid charges or unused credits will be displayed in the tab title.

The tab will show the total amount, without any details. To see the details, go to the [accounting tab](#).

Checkouts (3)	Relatives' checkouts (1)	Charges (2.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (0)	Article requests (1)	Claims (0/0)	Restrictions (0)	Clubs (0/1)
Total due: 2.00									

## Guarantees' charges

This tab will appear if the patron has guarantees and those guarantees have unpaid charges in their account. The total amount owed by guarantees will be displayed in the tab title.

The tab will show the guarantee's name and the total unpaid amount, without any details. To see details, go to the guarantee's [accounting tab](#).

Checkouts (3)	Relatives' checkouts (1)	Charges (2.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (0)	Article requests (1)	Claims (0/0)	Restrictions (0)	Clubs (0/1)								
<table><thead><tr><th>Guarantee</th><th>Amount outstanding</th></tr></thead><tbody><tr><td>Liam Charles (23529000197199)</td><td>2.75</td></tr><tr><td>Lisa Charles (23529000197047)</td><td>10.00</td></tr><tr><td>Total due</td><td>12.75</td></tr></tbody></table>										Guarantee	Amount outstanding	Liam Charles (23529000197199)	2.75	Lisa Charles (23529000197047)	10.00	Total due	12.75
Guarantee	Amount outstanding																
Liam Charles (23529000197199)	2.75																
Lisa Charles (23529000197047)	10.00																
Total due	12.75																

## Holds

If the patron has holds, the number of holds will appear on this tab's title and the details will appear in the tab.

Checkouts (3)	Relatives' checkouts (1)	Charges (2.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (0)	Article requests (1)	Claims (0/0)	Restrictions (0)	Clubs (0/1)																																												
<table><thead><tr><th>Hold date</th><th>Title</th><th>Call number</th><th>Item type</th><th>Barcode</th><th>Pickup at</th><th>Expiration</th><th>Priority</th><th>Delete?</th><th>Suspend?</th><th>Status</th></tr></thead><tbody><tr><td>28/07/2022</td><td>'Twixt Land and Sea : Tales by Conrad, Joseph,</td><td></td><td></td><td></td><td>Centerville (current)</td><td></td><td>1</td><td>No</td><td>Suspend</td><td></td></tr><tr><td>28/07/2022</td><td>A Defence of Poesie and Poems by Sidney, Philip,</td><td></td><td>Book</td><td>001143</td><td>Centerville</td><td>30/01/2023</td><td></td><td>No</td><td></td><td>Item is waiting here</td></tr><tr><td>03/02/2023</td><td>A Selection from the Lyrical Poems of Robert Herrick by Palgrave, Francis Turner,</td><td></td><td>Book</td><td>000208</td><td>Centerville</td><td>10/02/2023</td><td></td><td>No</td><td></td><td>Item is waiting here</td></tr></tbody></table>										Hold date	Title	Call number	Item type	Barcode	Pickup at	Expiration	Priority	Delete?	Suspend?	Status	28/07/2022	'Twixt Land and Sea : Tales by Conrad, Joseph,				Centerville (current)		1	No	Suspend		28/07/2022	A Defence of Poesie and Poems by Sidney, Philip,		Book	001143	Centerville	30/01/2023		No		Item is waiting here	03/02/2023	A Selection from the Lyrical Poems of Robert Herrick by Palgrave, Francis Turner,		Book	000208	Centerville	10/02/2023		No		Item is waiting here
Hold date	Title	Call number	Item type	Barcode	Pickup at	Expiration	Priority	Delete?	Suspend?	Status																																											
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[Cancel marked holds](#) Cancellation reason:

[Suspend all holds](#) until  ✖ Specify date on which to resume (DD/MM/YYYY) :

[Resume all suspended holds](#)

## Note

The barcode and call number will only appear on item-level holds or holds that have been confirmed. Record-level holds that are not waiting to be picked up will not have barcodes or call numbers.

From here you can manage the patron's holds: change the pickup library, cancel or suspend holds.

## Note

You will only be able to suspend holds if the [SuspendHoldsIntranet](#) system preference is set to "Allow".

## Note

If, when suspending a hold, you want to be able to set a date at which to automatically resume the hold, set the [AutoResumeSuspendedHolds](#) system preference to “Allow” and make sure the [unsuspend\\_holds cron job](#) is activated.

## Recalls

If [recalls are enabled](#), currently active [recalls requested by the patron](#) will appear in this tab. The number of active recalls will be displayed in the tab title.

Checkouts (3)	Relatives' checkouts (1)	Charges (2.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (1)	Article requests (1)	Claims ( 0   0 )	Restrictions (0)	Clubs (0/1)												
Showing 1 to 1 of 1 entries																					
Show 20 ▾ entries < First < Previous 1 Next > Last > Search: <input type="text"/> ✖ Clear filter																					
<table><thead><tr><th>Title</th><th>Placed on</th><th>Expires on</th><th>Pickup location</th><th>Status</th><th>Due date</th></tr></thead><tbody><tr><td>The Dark Lady of the Sonnets Shaw, Bernard,</td><td>23/05/2023</td><td>Never expires</td><td>Centerville</td><td>Requested</td><td>Due to be returned by 30/05/2023</td></tr></tbody></table>										Title	Placed on	Expires on	Pickup location	Status	Due date	The Dark Lady of the Sonnets Shaw, Bernard,	23/05/2023	Never expires	Centerville	Requested	Due to be returned by 30/05/2023
Title	Placed on	Expires on	Pickup location	Status	Due date																
The Dark Lady of the Sonnets Shaw, Bernard,	23/05/2023	Never expires	Centerville	Requested	Due to be returned by 30/05/2023																
Actions ▾																					
Showing 1 to 1 of 1 entries < First < Previous 1 Next > Last >																					

From here staff members can see the status of each recall and [manage them](#).

## Article requests

If the [ArticleRequests](#) system preference is enabled, and the circulation rules allow it, the patrons will be able to request articles, either through the OPAC or in the staff interface. The number of active requests will be displayed in the tab title.

The details of the patron’s request, and its status, are visible in this tab.

Checkouts (3)	Relatives' checkouts (1)	Charges (2.00)	Guarantees' charges (12.75)	Holds (3)	Recalls (1)	Article requests (1)	Claims ( 0   0 )	Restrictions (0)	Clubs (0/1)																												
Showing 1 to 1 of 1 entries																																					
<table><thead><tr><th>Record title</th><th>Placed on</th><th>Title</th><th>Author</th><th>Volume</th><th>Issue</th><th>Date</th><th>TOC</th><th>Pages</th><th>Chapters</th><th>Notes</th><th>Format</th><th>Status</th><th>Pickup library</th></tr></thead><tbody><tr><td>Shakespeare's Sonnets Shakespeare, William,</td><td>01/03/2023</td><td>So is it not with me as with that Muse</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>Copy</td><td></td><td>Midway</td></tr></tbody></table>										Record title	Placed on	Title	Author	Volume	Issue	Date	TOC	Pages	Chapters	Notes	Format	Status	Pickup library	Shakespeare's Sonnets Shakespeare, William,	01/03/2023	So is it not with me as with that Muse									Copy		Midway
Record title	Placed on	Title	Author	Volume	Issue	Date	TOC	Pages	Chapters	Notes	Format	Status	Pickup library																								
Shakespeare's Sonnets Shakespeare, William,	01/03/2023	So is it not with me as with that Muse									Copy		Midway																								
Actions ▾																																					

## Claims

If the patron has [claimed they returned items](#), but those were not checked in, the claims will be shown in this tab. The number of resolved and unresolved claims will be displayed in the tab title. The first number, in green (or in gray if it’s 0), represents the number of resolved claims and the second number, in yellow (or in gray if it’s 0), represents the number of unresolved claims.

Checkouts (4)	Relatives' checkouts (1)	Holds (3)	Recalls (0)	Article requests (1)	Claims ( 1   1 )	Restrictions (0)	Clubs (0/1)										
Showing all 2 claims Show 1 unresolved claim																	
<table><thead><tr><th>Title</th><th>Notes</th><th>Created on</th><th>Updated on</th><th>Resolution</th></tr></thead><tbody><tr><td>The Tempest by Shakespeare, William, 000132</td><td>23/05/2023</td><td></td><td></td><td></td></tr></tbody></table>								Title	Notes	Created on	Updated on	Resolution	The Tempest by Shakespeare, William, 000132	23/05/2023			
Title	Notes	Created on	Updated on	Resolution													
The Tempest by Shakespeare, William, 000132	23/05/2023																
Actions ▾																	

From this tab, staff can edit claim notes and [resolve claims](#).

## Restrictions

The Restrictions tab will show for all patrons. If the patron has no restrictions you will see that on the tab.

[Checkouts \(0\)](#) [Holds \(0\)](#) [Claims \(0 0\)](#) [Restrictions \(0\)](#)

Patron is currently unrestricted.

[+ Add manual restriction](#)

If the patron has restrictions on their account the tab will show the number and the description.

There are at least four kinds of restrictions:

- Manual
- Overdues
- Suspension
- Discharge

Using the ‘Add manual restriction’ link you can add a restriction to the patron record from here. This can be used for any type of restriction you need to put manually on a patron record.

## Note

Only staff with the [manage\\_restrictions](#) permission (or [superlibrarian](#)) will be able to add manual restrictions or remove existing restrictions.

[Checkouts \(0\)](#) [Holds \(0\)](#) [Claims \(0 0\)](#) [Restrictions \(0\)](#)

Patron is currently unrestricted.

### Add manual restriction

Comment:   
Expiration:  \*

[Add restriction](#) [Cancel](#)

- Type: if the [PatronRestrictionTypes](#) system preference is enabled, you will have a choice of restriction types. This list can be managed from the [patron restriction types administration page](#)
- Comment: enter a comment to explain the restriction
- Expiration: optionally enter an expiration date for this restriction. If there is no expiration date, the restriction will stay on the file until it is removed. If there is an expiration date, the restriction will automatically be expired and it will show in gray.

## Version

Expired restrictions are marked as such as of Koha version 23.11. In prior versions, if a restriction was expired, it looked the same as an active restriction, but it stopped blocking circulation nonetheless.

## Note

Expired restrictions will stay visible in the patron’s file, but will not block circulation.

You can use the [cleanup\\_database.pl cronjob](#) with the *-restrictions* flag to automatically remove expired restrictions.

Checkouts (0)	Holds (0)	Claims (0)	Restrictions (2)	Patron lists (0)
Type	Comment	Expiration	Created	
Manual	Vandalism is study room 3	01/01/2024	12/12/2023	<input type="button"/> Remove
Manual	Vandalism is study room 3	08/23/2023 (expired)	08/12/2023	<input type="button"/> Remove
<a href="#">+ Add manual restriction</a>				

The overdues restrictions are automatically set when overdue notices are sent if you specified you wanted the patron restricted in the [overdue notice/status triggers tool](#).

This restriction will not be removed automatically when the overdue items are returned unless the [AutoRemoveOverduesRestrictions](#) system preference is set to 'Do'.

In the [circulation rules](#), you can choose to fine users by suspending them instead of (or in addition to) fining them money. In that case, returning an overdue document will trigger a suspension restriction.

Patrons may also be restricted if you have issued a [discharge](#) for them. Once the discharge is validated, the patron is automatically restricted.

Patrons can also be restricted by [setting flags in their accounts](#).

Restrictions on a patron record will block checkouts. In fact, a message will appear in red when going to the checkout page.

Cannot check out!
Attention
• <b>Restricted since 18/05/2023:</b> Patron's account is restricted until 31/05/2023 with the explanation: Vandalism in study room 3
<input type="button"/> View restrictions <input type="button"/> Override restriction temporarily
Messages
<a href="#">+ Add a new message</a>

## Note

Only staff with the [force\\_checkout](#) permission (or [superlibrarian](#)) will be able to temporarily override a restriction in order to check out anyway.

Restrictions may also prevent renewing items if the [RestrictionBlockRenewing](#) system preference is set to 'block'.

On the OPAC, patrons will get a message saying their account is frozen. They will not be able to place holds from the OPAC.

## Your summary

Hello, Johnny Bryan  
[Click here if you're not Johnny Bryan](#)

- **Please note:** Your account has been frozen. Comment: **Vandalism in study room 3** End date: 08/15/2022 *Usually the reason for freezing an account is old overdues or damage fees. If your account shows to be clear, please contact the library.* [Go to your account page](#)

If you have patrons that have more than one restriction, you can choose to cumulate their restriction periods or not through the [CumulativeRestrictionPeriods](#) system preference.

## Note

If you want to restrict patrons from doing various actions if their record is not pristine, check the following system preferences:

- Set the [OverduesBlockCirc](#) system preference to ‘Block’ to prevent patrons who have overdue materials from checking out other materials.
- Set the [OverduesBlockRenewing](#) system preference to ‘block renewing for all the patron’s items’ or ‘block renewing only for this item’ to prevent patrons who have overdue materials from renewing their loans.
- Enter values in the [noissuescharge](#) and [NoIssuesChargeGuarantees](#) system preferences in order to block checking out to patrons who have more than a certain amount in fines or to patrons whose guarantees owe more than a certain amount.
- Enter a value in the [maxoutstanding](#) system preference to prevent patron from placing holds on the OPAC if they owe more than a certain amount.
- Enter a value in the [OPACFineNoRenewals](#) system preference to prevent patron who owe more than a certain amount to renew their loans from the OPAC.
- Set the [BlockExpiredPatronOpacActions](#) system preference to ‘Block’ if you want to prevent patron whose membership has expired to place hold or renew their loans from the OPAC.

## Clubs

If you use [patron clubs](#), patrons will have a tab in their record indicating which club they are enrolled in, if any. The first number in the tab title is the number of clubs in which the patron is enrolled, and the second number is the number of clubs the patron is not enrolled in.

Name	Description	Date enrolled	Actions
March 2024 Book Club	Meet to discuss the selected title	12/08/2023	<a href="#">Modify enrollment</a> <a href="#">Cancel enrollment</a>

Name	Description	Actions
April 2024 Book Club	Meet to discuss the selected title	<a href="#">+ Enroll</a>
May 2024 Book Club	Meet to discuss the selected title	<a href="#">+ Enroll</a>

## Accounting

### Note

Staff members must have the [updatecharges permission](#) or at least have the [remaining\\_permissions permission](#) under [updatecharges](#) (or the [superlibrarian permission](#)) in order to have access to this tab.

The patron’s complete accounting history will appear on the Accounting tab. The Accounting tab will show all types of charges and credits: overdue fines, membership fees, rental fees, hold fees and any other charge you may have for patrons.

Edit   Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More

### Account for Henry Acevedo (23529000035676)

Transactions													Actions		
													<input type="button" value="Receipt"/>	<input type="button" value="Details"/>	<input type="button" value="Void payment"/>
													<input type="button" value="Print"/>	<input type="button" value="Details"/>	<input type="button" value="Issue refund"/>
													<input type="button" value="Print"/>	<input type="button" value="Details"/>	<input type="button" value="Pay"/>
													<input type="button" value="Cancel charge"/>	<input type="button" value="Apply discount"/>	
Created	Updated	Account type	Description of charges	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Note	Amount	Outstanding		
24/05/2023 12:14	24/05/2023 12:14	Payment	Cash									-10.95	0.00	<input type="button" value="Receipt"/> <input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Pay"/> <input type="button" value="Cancel charge"/> <input type="button" value="Apply discount"/>	
16/05/2023 12:14	24/05/2023 12:14	Lost item	Ten little fingers and ten little toes / 001229 Ten little fingers and ten little toes /	001229	PB FOX					Centerville		10.95	0.00	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Pay"/> <input type="button" value="Cancel charge"/> <input type="button" value="Apply discount"/>	
16/05/2023 12:18	16/05/2023 12:18	Lost item	Peek-a-who? / 001230 Peek-a-who? /	001230	PB LAD					Centerville		10.95	10.95	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Pay"/> <input type="button" value="Cancel charge"/> <input type="button" value="Apply discount"/>	
16/05/2023 12:10	16/05/2023 12:10	Lost item	J'ai perdu mon chat / 1238 ALB BEH J'ai perdu mon chat /	1238	ALB BEH					Centerville		10.95	10.95	<input type="button" value="Print"/> <input type="button" value="Details"/> <input type="button" value="Pay"/> <input type="button" value="Cancel charge"/> <input type="button" value="Apply discount"/>	
<b>Total due</b>													<b>21.90</b>		

Showing 1 to 4 of 4 entries   < First   < Previous   Next >   Last >

## Note

You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: account-fines).

## Note

It's possible to print a summary of outstanding charges and unused credits in the patron's account by clicking ‘Print’ at the top of the page and choosing the ‘Print account balance’.

Edit   Change password   Duplicate      Search to hold   Add message   Schedule pickup   More

**Attention**

- › **Overdues:** Patron has ITEMS OVERDUE See highlights
- › **Charges:** Patron has outstanding charges of 27.25

**Holds waiting here (1)**

- › Beautiful Stories from Shakespeare (Book), by Ne...  
Waiting here until 10/02/2023

‘Print summary’ will print a full summary of the patron’s account, including outstanding charges.

The Transactions tab will show you the following columns:

- Date: the date the charge, payment or credit was posted
  - In the case of fines this will be the last day that the fine was accrued
- Account type: what type of charge, payment or credit it is
  - In cases where an account type may have an accompanying *status* it will be displayed alongside the account type in brackets.
- Description of charges: a description of the charges including the due date for overdue items and a link to the item record where one is available

## Note

For overdue fines, the default is the title and the due date. You can customize this by editing the OVERDUE\_FINE\_DESC template in the [Notices and slips tool](#).

- Barcode: if the charge is linked to a particular item, the barcode is displayed
- Call number: if the charge is linked to a particular item, the item's call number is displayed
- Due date: if the charge is an overdue fine, the due date is displayed
- Checkin date: if the charge is an overdue fine, the checkin date is displayed
- Checkout date: if the charge is an overdue fine, the check out date is displayed
- Home library: if the charge is linked to a particular item the home library is displayed
- Note: any notes about this charge/payment
  - If you're allowing patrons to pay fines via the OPAC with PayPal ([EnablePayPalOpacPayments](#)) you will see a Note that says 'PayPal' for items paid this way
- Amount: the total amount of the payment or charge
- Outstanding: the amount still due on charge
- Actions:
  - A selection of actions available to take upon the account line as detailed below

At the top of the table you can click the 'Filter paid transaction' to hide all completed transaction and above that you can use the search box to find a specific charge or payment.

## Actions

Action buttons will be available for the different account lines depending on the user's permissions and the account type and status.

- A button to print or email a receipt or invoice for that line item

## Note

If the line item is a credit (payment, writeoff or other credit), the receipt that will be printed will be the ACCOUNT\_CREDIT notice. It can be customized in the [Notices and slips tool](#).

If the line item is a debit (a charge), the invoice that will be printed will be the ACCOUNT\_DEBIT notice. It can be customized in the [Notices and slips tool](#).

- A button to show further details about the charge and any payments that have been made
- A button to void (reverse) a payment/credit
  - This button will only appear on a payment/credit line. Upon voiding the line it will reverse the payment process restoring the amountoutstanding for any debts/debits which the payment/credit may have previously been used to offset. This action is most commonly used to correct cases

where a payment was recorded but never actually received. The credit line will be set to a zero amount and updated to *VOID*.

- A button to cancel (remove) a charge/debit
  - This button will only appear on a charge/debit line that has not already had any payment/credits applied to it. Upon cancelling the line it will be marked as ‘Cancelled’ and a *CANCELLATION* line will be added and offset against it. This action is most commonly used to correct cases where a charge was made mistakenly.
- A button to pay against charges/debits with outstanding amounts
  - This button will appear against any charge/debit with an outstanding amount. The subsequent page can be used to pay or writeoff the line partially or in full with a *PAYMENT* or *WRITEOFF* line being added.
- A button to issue a payout of credit
  - This button will appear against any credit line that has an amount outstanding and you have the [payout permission](#). It allows the librarian to return outstanding credit to the patron and record the action with a *PAYOUT* line.
- A button to issue a refund against a charge/debit
  - This button will appear against any charge/debit line that has been paid or partially paid and you have the [refund permission](#). The subsequent modal dialogue will allow you to partially or fully refund the offset debt, either in *CASH* or by means of a credit added to the account.
- A button to apply a discount to a charge/debit
  - This button will appear against any charge/debit which has not already been offset by a credit/payment and you have the [discount permission](#). The subsequent modal dialogue will allow you to add a discount upon the charge.

## Charging fines/fees

Most fees and fines will be charged automatically if the [fines cron job](#) is running. Fines will also be charged when an overdue item is checked in if the [CalculateFinesOnReturn](#) system preference is enabled.

- Fines will be charged based on your [circulation and fines rules](#)
- Hold fees will be charged based on the rules you set in the [Patron types and categories](#) administration area
- Rental fees will be charged based on the settings in your [Item types](#) administration area
- Marking an item ‘Lost’ via the cataloging module will automatically charge the patron the replacement cost for that item
- Creating a patron in a [category](#) with an enrollment fee.
- Renewing a patron account in a [category](#) with an enrollment fee.
- Article request fees will be charged based on the [article request fees](#) section of the circulation rules page.

## Creating manual invoices

For fees that are not automatically charged, staff can create a manual invoice.

### Note

Staff members must have the [manual\\_invoice permission](#) (or the [superlibrarian permission](#)) in order to add manual invoices in a patron's account.

- Click on the 'Create manual invoice' tab

The screenshot shows the 'Create manual invoice' page. At the top, there's a navigation bar with links like 'Edit', 'Change password', 'Duplicate', 'Print', etc. Below it is a green header bar with four tabs: 'Transactions', 'Make a payment', 'Create manual invoice' (which is highlighted in green), and 'Create manual credit'. The main content area is titled 'Manual invoice' and contains several input fields: 'Type' (set to 'Lost item'), 'Barcode', 'Description' (set to 'Lost item'), 'Note', and 'Amount' (set to 'Example: 5.00'). Below these fields is a section titled 'Additional fields' with a 'Initials' field. At the bottom of the page are three buttons: 'Save' (yellow), 'Save and pay' (orange), and 'Cancel'.

- Type: choose the type of invoice to create.

### Note

To add additional values to the manual invoice type pull down menu, add them to the [debit types](#) in the Administration module.

- Barcode: if the fee is associated with an item you can enter its barcode so that the line item shows a link to that item.
  - Description: enter the description of the charge.
  - Note: if needed, add a note about this charge.
  - Amount: enter the amount of the charge, do not enter currency symbols, only numbers and decimals
  - If any [additional fields](#) were set up for account line debits, they will appear here.
- Click 'Save' to charge the amount to the patron's account, or
  - Click 'Save and pay' to charge the amount to the patron's account and go directly to the [payment page](#).

### Paying and writing off charges

Each account line can be paid in full or written off using the 'Make a payment' tab.

Edit   Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More ▾

## Make a payment

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

✓ Select all | ✖ Clear all

Showing 1 to 3 of 3 entries

Actions														Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<input type="button" value="Add note"/>	10.95	10.95												
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<input type="button" value="Add note"/>	10.95	10.95												
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<input type="button" value="Add note"/>	10.95	10.95												

Total due: 32.85

Showing 1 to 3 of 3 entries

[Pay amount](#) [Pay selected](#) [Write off all](#) [Write off selected](#) [Cancel](#)

## Note

You can customize the columns of this table in the [Table settings](#) section of the Administration module (table id: pay-fines-table).

Each account line can be paid in full, partially paid, or written off.

### Paying an individual charge in full

To pay an individual charge in full:

- If you need to add a note about the payment, click ‘Add note’ and type in the note before proceeding.
- Click the ‘Pay’ button next to the charge to be paid in full.

Edit   Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More ▾

## Make a payment

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

✓ Select all | ✖ Clear all

Showing 1 to 3 of 3 entries

Actions														Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<input type="button" value="Add note"/>	10.95	10.95												
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<input type="button" value="Add note"/>	10.95	10.95												
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<input type="button" value="Add note"/>	10.95	10.95												

Total due: 32.85

Showing 1 to 3 of 3 entries

[Pay amount](#) [Pay selected](#) [Write off all](#) [Write off selected](#) [Cancel](#)

A table will show the details of the charge being paid, the full amount of the charge will be populated for you in the ‘Amount being paid’ and the ‘Amount tendered’ fields.

## Note

If you made a mistake and this charge should be written off instead, you can switch between ‘Pay’ and ‘Write off’ mode using the buttons located at the top of this tab. See [Writing off an individual charge](#)

below.

**Pay an individual fine**

Edit   + Add guarantee   Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More

Transactions   Make a payment   Create manual invoice   Create manual credit

Pay   Write off

**Pay an individual fine**

Description	Account type	Amount	Amount outstanding
Manual fee		2.75	2.75
Total amount payable:		2.75	

Amount being paid:

Amount tendered:

Change to give: 0.00

Payment type:  Required

Cash register:

Additional fields

Bank name:

Check #:

- Amount being paid: this is the amount that will be debited from the charge. When paying a charge in full, this should be the full amount.
- Amount tendered: this is the actual amount handed to you by the patron, it will be used to calculate the change. For example, if a patron has a 2.75\$ fine to pay, and they pay with a 5\$ bill, enter 5 in ‘Amount tendered’.
- Change to give: if the amount being paid and the amount tendered are different (i.e. more money was collected) the amount of change to be given will be displayed.
- Payment type: choose the type of payment.

#### Note

This field will only appear if one or more values are defined under the [PAYMENT\\_TYPE authorized value](#).

#### Note

This field will be required if either the [UseCashRegisters](#) system preference or the [RequirePaymentType](#) system preference is enabled.

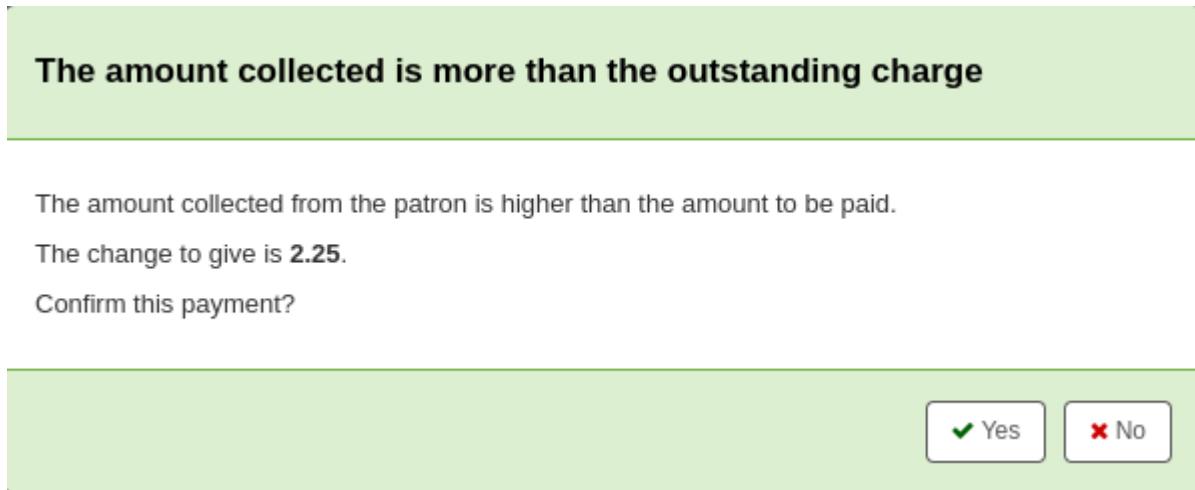
- Cash register: if the [UseCashRegisters](#) system preference is enabled, you will have a choice of cash register in which to enter the transaction.

#### Note

If the [UseCashRegisters](#) system preference is enabled, and the CASH payment type is chosen above, you will be required to choose a cash register for the payment.

Whether or not this field is required when another payment type is chosen is determined by the [RequireCashRegister](#) system preference.

- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Confirm’.
- If change was to be given back to the patron, a pop-up window will appear to remind you, click ‘Yes’ to confirm that you gave back the correct amount and confirm the payment.



The charge's outstanding amount will be set to zero (fully paid), and a payment line will be added in the patron's transactions.

### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_PAYMENT letter, which can be modified in the [Notices and slips tool](#).

### Partially paying an individual charge

To partially pay an individual charge:

- Click the ‘Pay’ button next to the charge to be partially paid.

[Edit](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [Schedule pickup](#) [More](#)

### Make a payment

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

Select all |  Clear all  
Showing 1 to 3 of 3 entries

	Actions	Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<a href="#">+ Add note</a>	<b>10.95</b>	<b>10.95</b>
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<a href="#">+ Add note</a>	<b>10.95</b>	<b>10.95</b>
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<a href="#">+ Add note</a>	<b>10.95</b>	<b>10.95</b>

Total due: **32.85**

Showing 1 to 3 of 3 entries

[Pay amount](#) [Pay selected](#) [Write off all](#) [Write off selected](#) [Cancel](#)

A table will show the details of the charge being paid, the full amount of the charge will be populated for you in the ‘Amount being paid’ and the ‘Amount tendered’ fields.

## Note

If you made a mistake and this charge should be written off instead, you can switch between ‘Pay’ and ‘Write off’ mode using the buttons located at the top of this tab. See [Partially writing off an individual charge](#) below.

[Edit](#) [+ Add guarantee](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [Schedule pickup](#) [More](#)

### Pay an individual fine

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

Pay  Write off

#### Pay an individual fine

Description	Account type	Amount	Amount outstanding
Manual fee		<b>6.75</b>	<b>6.75</b>
<b>Total amount payable:</b>		<b>6.75</b>	

Amount being paid:

Amount tendered:

Change to give: 0.00

Payment type:  Required

Cash register:

#### Additional fields

Bank name:

Check #:

[Confirm](#) [Cancel](#)

- Amount being paid: this is the amount that will be debited from the charge. When partially paying a charge, enter the amount that should be paid.
- Amount tendered: this is the actual amount handed to you by the patron, it will be used to calculate the change. For example, if a patron has a 2.75\$ fine to pay, and they pay with a 5\$ bill, enter 5 in ‘Amount tendered’.
- Change to give: if the amount being paid and the amount tendered are different (i.e. more money was collected) the amount of change to be given will be displayed.
- Payment type: choose the type of payment.

### Note

This field will only appear if one or more values are defined under the [PAYMENT\\_TYPE authorized value](#).

### Note

This field will be required if either the [UseCashRegisters](#) system preference or the [RequirePaymentType](#) system preference is enabled.

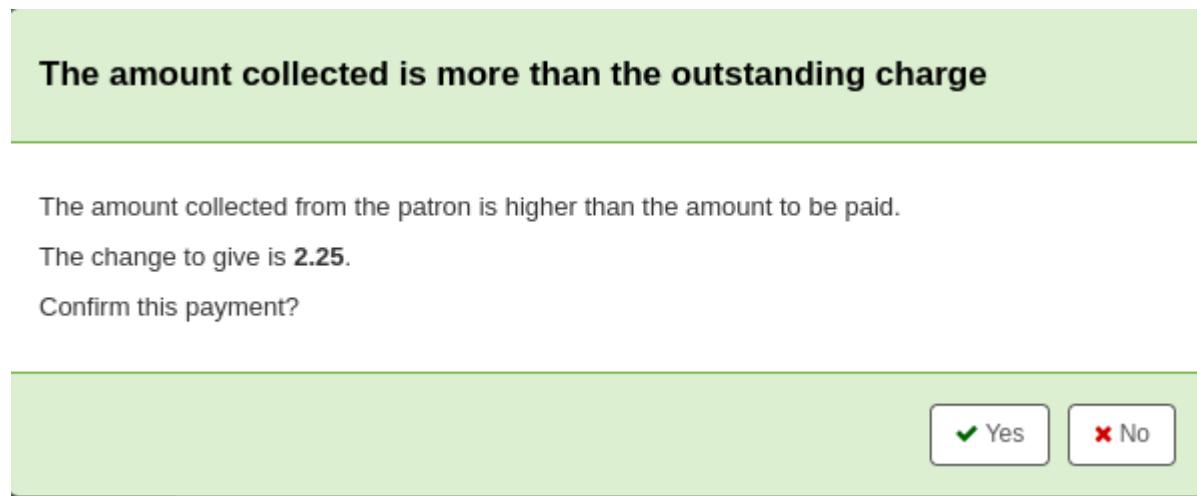
- Cash register: if the [UseCashRegisters](#) system preference is enabled, you will have a choice of cash register in which to enter the transaction.

### Note

If the [UseCashRegisters](#) system preference is enabled, and the CASH payment type is chosen above, you will be required to choose a cash register for the payment.

Whether or not this field is required when another payment type is chosen is determined by the [RequireCashRegister](#) system preference.

- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Confirm’.
- If change was to be given back to the patron, a pop-up window will appear to remind you, click ‘Yes’ to confirm that you gave back the correct amount and confirm the payment.



The charge will be updated to show the original amount and the current amount outstanding, and a payment line will be added in the patron's transactions.

### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_PAYMENT letter, which can be modified in the [Notices and slips tool](#).

## Paying an amount towards all charges

To pay an amount towards all charges:

- Click the ‘Pay amount’ button.

The screenshot shows a table of lost items with the following data:

	Actions	Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat.)	16/05/2023	1238	ALB BEH					Centerville	<input type="button" value="Add note"/>	10.95	10.95
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Peek-a-who? / 001230 (Peek-a-who?)	16/05/2023	001230	PB LAD					Centerville	<input type="button" value="Add note"/>	10.95	10.95
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes.)	16/05/2023	001229	PB FOX					Centerville	<input type="button" value="Add note"/>	10.95	10.95

Total due: 32.85

Buttons at the bottom: Pay amount, Pay selected, Write off all, Write off selected, Cancel.

The total amount outstanding in the patron’s account will be displayed, and populated for you in the ‘Amount being paid’ and the ‘Amount tendered’ fields.

The screenshot shows the following data in the 'Pay an amount toward all fines' form:

Total amount outstanding:	34.50
Amount being paid:	34.50
Amount tendered:	34.50
Change to give:	0.00
Payment type:	None selected <span style="color:red">Required</span>
Cash register:	-- Select an option--
Note:	<input type="text"/>

Additional fields:

Bank name:	<input type="text"/>
Check #:	<input type="text"/>

Buttons at the bottom: Confirm, Cancel.

- Total amount outstanding: this is the total unpaid charges in the patron’s account.
- Amount being paid: this is the amount that will be debited from the outstanding amount. Enter the amount that will be paid.
- Amount tendered: this is the actual amount handed to you by the patron, it will be used to calculate the change. For example, if a patron has a 2.75\$ fine to pay, and they pay with a 5\$ bill, enter 5 in ‘Amount tendered’.

- Change to give: if the amount being paid and the amount tendered are different (i.e. more money was collected) the amount of change to be given will be displayed.
- Payment type: choose the type of payment.

#### Note

This field will only appear if one or more values are defined under the [PAYMENT\\_TYPE authorized value](#).

#### Note

This field will be required if either the [UseCashRegisters](#) system preference or the [RequirePaymentType](#) system preference is enabled.

- Cash register: if the [UseCashRegisters](#) system preference is enabled, you will have a choice of cash register in which to enter the transaction.

#### Note

If the [UseCashRegisters](#) system preference is enabled, and the CASH payment type is chosen above, you will be required to choose a cash register for the payment.

Whether or not this field is required when another payment type is chosen is determined by the [RequireCashRegister](#) system preference.

- Note: if needed, add a note about this payment.
- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Confirm’.
- If change was to be given back to the patron, a pop-up window will appear to remind you, click ‘Yes’ to confirm that you gave back the correct amount and confirm the payment.

**The amount collected is more than the outstanding charge**

The amount collected from the patron is higher than the amount to be paid.  
 The change to give is **2.25**.  
 Confirm this payment?

Yes    No

The charges' outstanding amounts will be updated, with the payment applied to oldest charges first, and a payment line will be added in the patron's transactions.

#### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_PAYMENT letter, which can be modified in the [Notices and slips tool](#).

## Paying selected charges

To pay only some charges:

- Check the selection boxes next to the charges to be paid.

Actions	Account type	Description	Date	Barcode	Due date	Checkin date	CHECKOUT date	Checked out from	Payment note	Amount	Amount outstanding
<input type="checkbox"/> Pay Write off	Fire (Acruing)	A Book of Scoundrels 2023-02-01 (A Book of Scoundrels )	2023-02-21	000629	2023-02-01		2023-02-21	Centerville	+ Add note	5.00	5.00
<input checked="" type="checkbox"/> Pay Write off	Fire (Lost)	A Defence of Poesie and Poems 07/30/2022 (A Defence of Poesie and Poems )	2022-11-18	001058	2022-07-30	2023-02-21 15:24	2022-07-28	Midway	+ Add note	27.75	27.75
<input checked="" type="checkbox"/> Pay Write off	Manual fee	Manual fee	2023-02-21						+ Add note	6.75	6.75

Total due: 39.50

Showing 1 to 3 of 3 entries

Pay amount Pay selected Write off all Write off selected Cancel

- Click the ‘Pay selected’ button.

The total outstanding amount for the selected charges will be displayed, and populated for you in the ‘Amount being paid’ and the ‘Amount tendered’ fields.

Pay an amount toward selected fines

Total amount outstanding: 34.50

Amount being paid: 34.50

Amount tendered: 34.50

Change to give: 0.00

Payment type: None selected Required

Cash register: -- Select an option--

Note:

Additional fields

Bank name: \_\_\_\_\_

Check #: \_\_\_\_\_

Confirm Cancel

- Total amount outstanding: this is the total unpaid amount for the selected charges.

- Amount being paid: this is the amount that will be debited from the total outstanding amount of the selected charges. Enter the amount that will be paid.
- Amount tendered: this is the actual amount handed to you by the patron, it will be used to calculate the change. For example, if a patron has a 2.75\$ fine to pay, and they pay with a 5\$ bill, enter 5 in ‘Amount tendered’.
- Change to give: if the amount being paid and the amount tendered are different (i.e. more money was collected) the amount of change to be given will be displayed.
- Payment type: choose the type of payment.

#### **Note**

This field will only appear if one or more values are defined under the [PAYMENT\\_TYPE authorized value](#).

#### **Note**

This field will be required if either the [UseCashRegisters](#) system preference or the [RequirePaymentType](#) system preference is enabled.

- Cash register: if the [UseCashRegisters](#) system preference is enabled, you will have a choice of cash register in which to enter the transaction.

#### **Note**

If the [UseCashRegisters](#) system preference is enabled, and the CASH payment type is chosen above, you will be required to choose a cash register for the payment.

Whether or not this field is required when another payment type is chosen is determined by the [RequireCashRegister](#) system preference.

- Note: if needed, add a note about this payment.
- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Confirm’.
- If change was to be given back to the patron, a pop-up window will appear to remind you, click ‘Yes’ to confirm that you gave back the correct amount and confirm the payment.

## The amount collected is more than the outstanding charge

The amount collected from the patron is higher than the amount to be paid.

The change to give is **2.25**.

Confirm this payment?

Yes

No

The selected charges' outstanding amounts will be updated, with the payment applied to oldest charges first, and a payment line will be added in the patron's transactions.

### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_PAYMENT letter, which can be modified in the [Notices and slips tool](#).

## Writing off all charges

### Note

Staff members must have the [writeoff permission](#) (or the [superlibrarian permission](#)) in order to be able to write off charges.

To write off all charges in a patron's account:

- Click the 'Write off all' button

The screenshot shows a 'Make a payment' interface with the following details:

- Buttons:** Edit, Change password, Duplicate, Print, Search to hold, Add message, Schedule pickup, More.
- Section:** Make a payment
- Sub-sections:** Transactions (selected), Make a payment, Create manual invoice, Create manual credit.
- Filter:** Select all | Clear all, Showing 1 to 3 of 3 entries.
- Search:** Search: [ ] Clear filter.
- Table Headers:** Actions, Account type, Description, Date, Barcode, Call number, Due date, Checkin date, Checkout date, Checked out from, Home library, Payment note, Amount, Amount outstanding.
- Table Data:**

	Actions	Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<input type="button" value="Add note"/>	10.95	10.95
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<input type="button" value="Add note"/>	10.95	10.95
<input checked="" type="checkbox"/>	<input type="button" value="Pay"/> <input type="button" value="Write off"/>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<input type="button" value="Add note"/>	10.95	10.95
- Total:** Total due: 32.85
- Buttons at bottom:** Pay amount, Pay selected, Write off all, Write off selected, Cancel.

- Confirm the writeoff

All charges' outstanding amounts will be set to zero (fully paid/written off), and a writeoff line will be added in the patron's transactions.

### Writing off an individual charge

#### Note

Staff members must have the [writeoff permission](#) (or the [superlibrarian permission](#)) in order to be able to write off charges.

To write off a single charge:

- If you need to add a note about the writeoff, click 'Add note' and type in the note before proceeding
- Click the 'Write off' button next to the charge to be written off

The screenshot shows a 'Make a payment' interface. At the top, there are tabs: 'Transactions' (selected), 'Make a payment' (highlighted in green), 'Create manual invoice', and 'Create manual credit'. Below the tabs are buttons for 'Select all' and 'Clear all', and a search bar. The main area is a table with the following columns: Actions, Account type, Description, Date, Barcode, Call number, Due date, Checkin date, Checkout date, Checked out from, Home library, Payment note, Amount, and Amount outstanding. There are three rows of data, each with a checkbox in the Actions column and a 'Pay' or 'Write off' button. The first row is for a 'Lost item' with barcode 1238, due on 16/05/2023, checked out from Centerville, and an amount of 10.95. The second row is for a 'Lost item' with barcode 001230, due on 16/05/2023, checked out from Centerville, and an amount of 10.95. The third row is for a 'Lost item' with barcode 001229, due on 16/05/2023, checked out from Centerville, and an amount of 10.95. At the bottom of the table, it says 'Total due: 32.85'. Below the table, there are buttons for 'Pay amount', 'Pay selected', 'Write off all', 'Write off selected', and 'Cancel'.

Actions	Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/> <span>Pay</span> <span>Write off</span>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<span>Add note</span>	10.95	10.95
<input checked="" type="checkbox"/> <span>Pay</span> <span>Write off</span>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<span>Add note</span>	10.95	10.95
<input checked="" type="checkbox"/> <span>Pay</span> <span>Write off</span>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<span>Add note</span>	10.95	10.95

A table will show the details of the charge being written off, the full amount of the charge will be populated for you in the 'Writeoff amount' field.

#### Note

If you made a mistake and this charge should be paid instead, you can switch between 'Pay' and 'Write off' mode using the buttons located at the top of this tab. See [Paying an individual charge in full](#) above.

## Write off an individual fine

Pay Write off

Write off an individual fine

Description	Account type	Amount	Amount outstanding
Manual fee		6.75	6.75
Total amount outstanding:		6.75	
Writeoff amount:	6.75		

Additional fields

Bank name: [ ]

Check #: [ ]

Write off this charge Cancel

- Writeoff amount: this is the amount that will be debited from the charge. When writing off a charge completely, this should be the full amount.
- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Write off this charge’

The charge’s outstanding amount will be set to zero (fully paid/written off), and a writeoff line will be added in the patron’s transactions.

### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_WRITEOFF letter, which can be modified in the [Notices and slips tool](#).

## Partially writing off an individual charge

### Note

Staff members must have the [writeoff permission](#) (or the [superlibrarian permission](#)) in order to be able to write off charges.

To partially write off a single charge:

- If you need to add a note about the writeoff, click ‘Add note’ and type in the note before proceeding
- Click the ‘Write off’ button next to the charge to be written off

[Edit](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [Schedule pickup](#) [More](#)

### Make a payment

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

Select all |  Clear all  
Showing 1 to 3 of 3 entries

	Actions	Account type	Description	Date	Barcode	Call number	Due date	Checkin date	Checkout date	Checked out from	Home library	Payment note	Amount	Amount outstanding
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	J'ai perdu mon chat / 1238 ALB BEH (J'ai perdu mon chat /)	16/05/2023	1238	ALB BEH					Centerville	<a href="#">+ Add note</a>	10.95	10.95
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	Peek-a-who? / 001230 (Peek-a-who? /)	16/05/2023	001230	PB LAD					Centerville	<a href="#">+ Add note</a>	10.95	10.95
<input checked="" type="checkbox"/>	<a href="#">Pay</a> <a href="#">Write off</a>	Lost item	Ten little fingers and ten little toes / 001229 (Ten little fingers and ten little toes /)	16/05/2023	001229	PB FOX					Centerville	<a href="#">+ Add note</a>	10.95	10.95

Total due: 32.85

Showing 1 to 3 of 3 entries

[Pay amount](#) [Pay selected](#) [Write off all](#) [Write off selected](#) [Cancel](#)

A table will show the details of the charge being written off, the full amount of the charge will be populated for you in the ‘Writeoff amount’ field.

## Note

If you made a mistake and this charge should be paid instead, you can switch between ‘Pay’ and ‘Write off’ mode using the buttons located at the top of this tab. See [Partially paying an individual charge](#) above.

[Edit](#) [+ Add guarantee](#) [Change password](#) [Duplicate](#) [Print](#) [Search to hold](#) [Add message](#) [Schedule pickup](#) [More](#)

### Write off an individual fine

[Transactions](#) [Make a payment](#) [Create manual invoice](#) [Create manual credit](#)

[Pay](#) [Write off](#)

#### Write off an individual fine

Description	Account type	Amount	Amount outstanding
Manual fee		6.75	6.75
Total amount outstanding:		6.75	
Writeoff amount:	<input type="text" value="6.75"/>		

**Additional fields**

Bank name:   
Check #:

[Write off this charge](#) [Cancel](#)

- Writeoff amount: this is the amount that will be debited from the charge. When partially writing off a charge, enter the amount to be written off.
- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Write off this charge’

The charge will be updated to show the original amount and the current amount outstanding, and a writeoff line will be added in the patron’s transactions.

## Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_WRITEOFF letter, which can be modified in the [Notices and slips tool](#).

## Writing off selected charges

### Note

Staff members must have the [writeoff permission](#) (or the [superlibrarian permission](#)) in order to be able to write off charges.

To write off only some charges:

- If you need to add a note about the writeoff, click ‘Add note’ and type in the note before proceeding
- Check the selection boxes next to the fines to be written off

The screenshot shows a software interface titled 'Make a payment'. At the top, there are tabs: 'Transactions' (selected), 'Make a payment', 'Create manual invoice', and 'Create manual credit'. Below the tabs, there are buttons for 'Select all' and 'Clear all', and a search bar with a 'Clear filter' link. A message indicates 'Showing 1 to 3 of 3 entries'. The main area is a table with the following columns: Actions, Account type, Description, Date, Barcode, Due date, Checkin date, Checkout date, Checked out from, Payment note, Amount, and Amount outstanding. Three rows of data are listed:

Actions	Account type	Description	Date	Barcode	Due date	Checkin date	Checkout date	Checked out from	Payment note	Amount	Amount outstanding
<input type="checkbox"/> <button>Pay</button> <button>Write off</button>	Fine (Accruing)	A Book of Scoundrels 2023-02-01 (A Book of Scoundrels )	2023-02-21	000629	2023-02-01		2023-02-21	Centerville	+ Add note	5.00	5.00
<input checked="" type="checkbox"/> <button>Pay</button> <button>Write off</button>	Fine (Lost)	A Defence of Poesie and Poems 07/30/2022 (A Defence of Poesie and Poems )	2022-11-18	001058	2022-07-30	2023-02-21	2022-07-28	Midway	+ Add note	27.75	27.75
<input checked="" type="checkbox"/> <button>Pay</button> <button>Write off</button>	Manual fee	Manual fee	2023-02-21						+ Add note	6.75	6.75

At the bottom, there are buttons for 'Pay amount', 'Pay selected', 'Write off all', 'Write off selected', and 'Cancel'. The total due amount is displayed as 39.50.

- Click the ‘Writeoff selected’ button

The total outstanding amount for the selected charges will be displayed, and populated for you in the ‘Writeoff amount’ field.

### Note

If you made a mistake and this charge should be paid instead, you can switch between ‘Pay’ and ‘Write off’ mode using the buttons located at the top of this tab. See [Paying selected charges](#) above.

## Write off an amount toward selected fines

Edit   + Add guarantee   - Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More ▾

**Transactions**   **Make a payment**   **Create manual invoice**   **Create manual credit**

Pay   **Write off**

Write off an amount toward selected fines

Total amount outstanding: **34.50**

Writeoff amount:

Note:

Additional fields

Bank name:

Check #:

**Confirm**   **Cancel**

- Writeoff amount: this is the amount that will be debited from the charge. When writing off the charges completely, this should be the full amount.
- Note: if needed, enter a note about this writeoff.
- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click ‘Confirm’

The selected charges' outstanding amounts will be updated, with the writeoff applied to oldest charges first, and a writeoff line will be added in the patron's transactions.

### Note

If the [FinePaymentAutoPopup](#) system preference is enabled, a print dialogue window will display. The receipt printed uses the letter ACCOUNT\_CREDIT, which can be modified in the [Notices and slips tool](#). If change was given for this transaction the details will be included when using this system preference.

In addition to printing receipts you can enable email receipts for payment and writeoff transactions with the [UseEmailReceipts](#) system preference. The email sent uses the ACCOUNT\_WRITEOFF letter, which can be modified in the [Notices and slips tool](#).

### Cancel fines or fees

If a user was charged for something and it's an error, you can cancel the fee by clicking the ‘Cancel charge’ button in the Actions column.

return	02/11/2022	Manual fee	Manual fee A Defence of Poesie and Poems	002266	Centerville	5,00	5,00	Print	Details	Pay	Cancel charge	Apply discount
02/11/2022	return	Manual fee	A Defence of Poesie and Poems	002266	Centerville	5,00	5,00	Print	Details	Pay	Cancel charge	Apply discount

Once clicked a new line will be added to the account for a ‘Cancelled charge’ of the same amount as the cancelled charge. The charge that was cancelled will now have the ‘Cancelled’ status and the amount outstanding will be 0.

Created	Account type	Description of charges	Barcode	Home library	Note	Amount	Outstanding	Actions
02/15/2022	Cancelled charge					-5,00	0,00	Print  Details  Void payment
02/11/2022	Manual fee (Cancelled)	Manual fee A Defence of Poesie and Poems	002266	Centerville		5,00	0,00	Print  Details  Issue refund

If you cancelled a charge by mistake, you can void the cancellation (see [Void payments](#) below).

### Void payments

If you accidentally mark an item as paid, you can reverse that line item by clicking ‘Void’ to the right of the line

▼ Filter paid transactions						
Date	Description of charges	Home library	Note	Amount	Outstanding	Actions
12/12/2019	Payment, thanks			-10.00	0.00	Print  Details  Void
12/12/2019	Lost item, Lost item			10.00	0.00	Print  Details

- Once clicked a new line item will be added to the account showing the payment as ‘Voided’. The payment line is added back to the Pay fines tab as an outstanding charge.

#### ▼ Filter paid transactions

Date	Description of charges	Home library	Note	Amount	Outstanding	Actions
12/12/2019	Voided			0.00	0.00	Print  Details
12/12/2019	Lost item, Lost item			10.00	10.00	Print  Details

## Creating manual credits

Manual credits can be used to pay off parts of fines, or to forgive a fine amount.

### Note

Staff members must have the [manual\\_credit\\_permission](#) (or the [superlibrarian\\_permission](#)) in order to add manual credits to a patron’s account.

- Click ‘Create manual credit’.

Manual credit

Credit type: Credit

Barcode:

Description:

Note:

Amount: Example: 5.00

Transaction type: None selected Required

Cash register: - Select an option-

Additional fields

Bank name:

Check #:

Add credit Cancel

- Type: choose the type of credit to apply.

### Note

To add additional values to the manual credit type drop-down menu, add them to the [credit types](#) in the Administration module.

- Barcode: if this credit is associated with an item you can enter that item’s barcode so that the line item links to the right item.

- Description: enter the description of the credit.
- Note: if needed, add a note about this credit.
- Amount: enter the credit's amount, do not enter currency symbols, only numbers and decimals.
- Transaction type: choose the type of credit.

#### Note

This field will only appear if one or more values are defined under the [PAYMENT\\_TYPE authorized value](#).

#### Note

This field will be required if either the [UseCashRegisters](#) system preference or the [RequirePaymentType](#) system preference is enabled.

- Cash register: if the [UseCashRegisters](#) system preference is enabled, you will have a choice of cash register in which to enter the transaction.

#### Note

If the [UseCashRegisters](#) system preference is enabled, and the CASH transaction type is chosen above, you will be required to choose a cash register for the payment.

Whether or not this field is required when another transaction type is chosen is determined by the [RequireCashRegister](#) system preference.

- If any [additional fields](#) were set up for account line credits, they will appear here.
- Click 'Add credit'.

This will add a credit line to the patron's account.

#### Note

If the [AccountAutoReconcile](#) system preference is set to 'Do', the credit will automatically be used to reduce the outstanding amounts in the patron's account, starting with the oldest charges.

#### Note

If the [AutoCreditNumber](#) system preference is enabled, credits will be numbered.

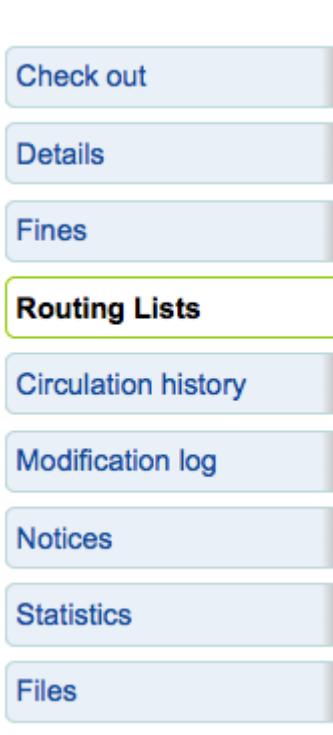
### Printing invoices

To the right of each account line there is a print link. Clicking that link will print an invoice for the line item that includes the date and description of the line item along with the total outstanding on the account.

<b><u>INVOICE</u></b>		
<b>Fairview</b>		
Bill To: Nicole Engard		
Card Number: 23529001223637		
Date	Description of charges	Amount
09/27/2010	Lost Item Voyages of discovery : 33203000745779	15.00
Total outstanding dues as on date:		2.65

## Routing lists

A list of all of the serial routing lists the patron belongs to will be accessible via the ‘Routing lists’ tab on the patron record.



On this tab you will be able to see and edit all of the routing lists that this patron is on.

Search subscriptions:

ISSN:  Title:

## 3 Subscription routing list(s)

Subscription title	Routing list
Computers in libraries.	<a href="#">Edit routing list</a>
Computers in libraries.	<a href="#">Edit routing list</a>
Library journal	<a href="#">Edit routing list</a>

## Circulation history

The circulation history tab will appear if you have set the [intranetreadinghistory](#) preference to allow it to appear. If you have the [OPACPrivacy](#) system preference set to ‘Allow’ and the patron has decided that the library cannot keep this information this tab will only show currently checked out items.

## Circulation history

Showing 1 to 3 of 3 entries

Date	Title	Author	Call number	Vol info	Barcode	Number of renewals	Checked out on	Checked out from	Date due	Return date
04/01/2023 11:41	The complete book of cat health and care,	McCoy, J. J.	SF442 .M24		5000000095496	0	04/01/2023 11:41	Centerville	18/01/2023 23:59	Checked out
04/01/2023 11:42	Marketing dictionary.	Strand, Stanley.			3013	0	04/01/2023 11:42	Centerville	18/01/2023 23:59	04/01/2023 11:42
04/01/2023 13:10	The misanthrope [Sound Recording]	Moliere, Jean Baptiste Poquelin, 1622-1673.	PHONO 156-157		50000000113356	2 [View]	28/12/2022 17:25	Riverside	13/01/2023 23:59	04/01/2023 13:10

Showing 1 to 3 of 3 entries    « First    < Previous    Next >    Last »

### Note

- You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: checkouthistory-table).

To see when an item was renewed and by whom, click ‘View’ in the Number of renewals column.



If you would like to export a list of barcodes for the items checked in today you can find that option under the More menu on the top right of the page.

Edit Change password Duplicate Print Search to hold More ▾

## Circulation history

Showing 1 to 8 of 8 Show 10 entries First Previous Next Last Search:

Date	Title	Author	Call no.
03/14/2012	Handle with care :	Picoult, Jodi,	PS3566.I372 H36 2009
03/14/2012	Harry Potter and the sorcerer's stone	Rowling, J. K.	PZ7.R79835 Har 1999ab
			100020 5

More ▾

- Renew patron
- Set permissions
- Delete
- Update child to adult patron
- Export today's checked in barcodes

This will generate a text file with one barcode per line.

### Note

If the [RecordStaffUserOnCheckout](#) system preference is enabled, the account of the staff member who checked out the item to the patron will also be displayed here.

## Holds history

The holds history tab will appear if the [IntranetReadingHistoryHolds](#) system preference is set to ‘Allow’. It shows all the holds the patron has made, with their status.

Holds history										
Showing 1 to 4 of 4 entries										
Show 20 entries <<First < Previous Next > Last >> Search: <input type="text"/> Clear filter Columns Export Configure										
Title	Author	Barcode	Call number	Library	Hold date	Expiration date	Waiting date	Cancellation date	Status	
Shakespeare's metrical art /	Wright, George Thaddeus.	39999000001532		Midway	07/18/2024	07/25/2024	07/18/2024		Waiting	
Shakespeare's sonnets /	Shakespeare, William,			Midway	07/18/2024				Pending	
Programming the Perl DBI /	Descartes, Alligator.	39999000000559		Midway	07/18/2024	07/25/2024	07/18/2024		Fulfilled	
A grammar of Shakespeare's language /	Blake, N. F.			Midway	07/18/2024			07/18/2024	Cancelled (Item could not be located on shelves)	

### Note

You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: holdshistory-table).

### Note

If the [OPACPrivacy](#) system preference is set to ‘Allow’ and the patron has decided to never keep their history, this tab will only show current holds.

## Modification log

### Note

Only staff with the [view\\_system\\_logs permission](#) (or the [superlibrarian permission](#)) will have access to this tool.

If you have set your [BorrowersLog](#) to track changes to patron records, then this tab will appear. The Modification log will show when changes were made to the patron record. If you also have turned on the [IssueLog](#) and [ReturnLog](#) you will see checkins and outs on this screen as well.

7 lines found.

Date	Librarian	Module	Action	Object	Info
2010-09-25 22:54:55	0	MEMBERS	CREATE	34	
2010-09-25 22:56:27	0	MEMBERS	MODIFY	34	UPDATE (executed w/ arg: 34)
2012-08-06 10:21:14	34	MEMBERS	CHANGE PASS	34	
2012-08-06 10:21:46	34	CIRCULATION	RETURN	34	Item TVSN500009826C
2012-08-06 10:22:08	34	CIRCULATION	RETURN	34	Item TVSN5000180321
2012-08-06 10:22:39	34	CIRCULATION	ISSUE	34	Item TVSN500017286B
2012-08-06 10:22:54	34	MEMBERS	MODIFY	34	UPDATE (executed w/ arg: 34)

- The Librarian field shows the patron number for the librarian who made the changes
- The module lists ‘MEMBERS’ for the patron module
- The action will tell you what action was being logged
- The Object field lists the borrowernumber that is being modified (in the example above, it was my changing my own record)

## Notices

The [patron's messaging preferences](#) are set when [adding](#) or [editing](#) the patron. This tab will show the messages that have been sent and those that are queued to be sent:

### Sent notices for Nicole Engard

Notice	Type	Status	Time
<a href="#">Purchase suggestion declined</a>	email	pending	2011-04-01 12:44:21
<a href="#">Purchase suggestion declined</a>	email	pending	2011-04-01 12:44:21
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-04-01 12:47:54
<a href="#">Purchase suggestion declined</a>	email	pending	2011-04-30 07:00:40
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-04-30 07:19:38
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-05-23 15:31:22
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-05-23 15:37:20
<a href="#">Check-ins</a>	email	pending	2011-07-06 00:20:09
<a href="#">Checkouts</a>	email	pending	2011-07-06 22:47:11
<a href="#">Hold Available for Pickup at Nicole's Library</a>	email	pending	2011-08-08 13:13:29
<a href="#">Hold Available for Pickup at Nicole's Library</a>	email	pending	2011-09-06 09:57:29
<a href="#">Hold Available for Pickup at Nicole's Library</a>	email	pending	2011-09-06 11:42:03
<a href="#">Purchase suggestion declined</a>	email	pending	2011-09-07 20:19:11
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-09-07 20:24:44
<a href="#">Purchase suggestion accepted</a>	email	pending	2011-09-07 20:30:27

Clicking on the message title will expand the view to show you the full text of the message that was sent.

Notice	Type	Status	Time
<a href="#">Purchase suggestion declined</a> Dear Nicole Engard,  You have suggested that the library acquire Book by Book.  The library has reviewed your request today, and has decided not to accept the suggestion at this time.  The reason given is:  If you have any questions, please email us at <a href="mailto:nengard@bywatersolutions.com">nengard@bywatersolutions.com</a> .  Thank you,  Nicole's Library	email	pending	2011-04-01 12:44:21

If the message has a status of sent or failed you will have the option to ‘resend’ the message to the patron by clicking the ‘resend’ button found under the status.

## Sent notices for Johnny Bryan (23529000120056)

Showing 1 to 1 of 1 Show 20 entries First Previous Next Last

Search:

Notice	Type	Status	Time
<b>Item Overdue</b> Dear Johnny Bryan,  According to our current records, you have items that are overdue. Your library does not charge late fines, but please return or renew them at the branch below as soon as possible.	print	sent <a href="#">Resend</a>	07/12/2016 15:08

## Statistics

Depending on what you set for the values of your [StatisticsFields](#) system preference, you can see statistics for one patron's circulation actions.

Nicole Engard  
(9876543457)



123 My Street  
Philadelphia, PA 19101  
555.111.2345  
nengard@gmail.com  
Category: (S)  
Home library:

[Check out](#)  
[Details](#)  
[Fines](#)  
[Circulation history](#)  
[Modification log](#)  
[Notices](#)  
[Statistics](#)

location	itype	ccode	Total checkouts as of yesterday	Today's checkouts	Today's checkins	Total checkouts
BK			2	0	0	2
LIV	BK	LIS	1	1	0	2
<b>TOTAL</b>			<b>3</b>	<b>1</b>	<b>0</b>	<b>4</b>

## Files

If you set the [EnableBorrowerFiles](#) preference to 'Do' the Files tab will be visible on the patron information page.

[Check out](#)[Details](#)[Fines](#)[Routing Lists](#)[Circulation history](#)[Modification log](#)[Notices](#)[Statistics](#)**Files**

From here you can upload files to attach to the patron record.

## Files

This patron has no files attached.

**Upload New File**

Description:

File:

All files that are uploaded will appear above a form where additional files can be uploaded from.

## Files

Name	Type	Description	Uploaded	
<a href="#">wordpress-tblc-2012.pdf</a>	application/pdf	Presentation	08/08/2012	<a href="#">Delete</a>

**Upload New File**

Description:

File:

## Purchase suggestions

If the patron has made any purchase suggestions you will see a purchase suggestions tab on the patron record.

The screenshot shows the Koha Patron Record interface. On the left, there's a sidebar with links like Check out, Details, Accounting, Routing lists, Circulation history, Modification log, Notices, Statistics, and Purchase suggestions (which is highlighted). The main content area has a header with options like Edit, Change password, Duplicate, Print, Search to hold, Add message, and More. Below the header is a section titled "Purchase suggestions" with a "New purchase suggestion" button. A table lists two purchase suggestions:

Summary	Note	Non-public note	Managed by	Managed on	Suggested on	Status
Big book of little kittens Shaw, Hannah,		Non-public note	koha (42)	11/06/2023	11/06/2023	Requested
Cats on catnip Martilla, Andrew,			koha (42)	11/06/2023	11/06/2023	Accepted by the library

### Note

Staff members must have the [suggestions\\_manage permission](#) (or the [superlibrarian permission](#)) in order to create purchase suggestions for patrons and view existing purchase suggestions.

From here you can see all suggestions made by the patron and their status, you can also create a purchase suggestion on the patron's behalf by clicking the 'New purchase suggestion' button at the top.

Learn more about [managing purchase suggestions](#) in the Acquisitions chapter of this manual.

## Patron discharges

A discharge is a certificate that says the patron has no current checkouts and no holds. To enable this option on the patron record, set the [useDischarge](#) system preference to 'Allow'.

### Note

In France, a “*quitus*” (“discharge”) is needed if you want to register for an account in a library or a university.

### Note

Academic libraries often require that you have a clear record at the library before you can graduate.

## Emitting a discharge

To generate a discharge for a specific patron, click the 'Discharges' tab on the left of the patron record.

**Joann Duffy (23529000218553)**

1555 Library Rd.  
Portland, OR 44240  
**(212) 555-1212**

Born: 17/02/1942 (81 years)

No email stored.

Category: Student (ST)

Home library: Midway

Borrowernumber: 24

Updated on 13/03/2023 15:39

[Check out](#)

[Batch check out](#)

[Details](#)

[Accounting](#)

[Routing lists](#)

[Circulation history](#)

[Holds history](#)

[Modification log](#)

[Notices](#)

[Statistics](#)

[Purchase suggestions](#)

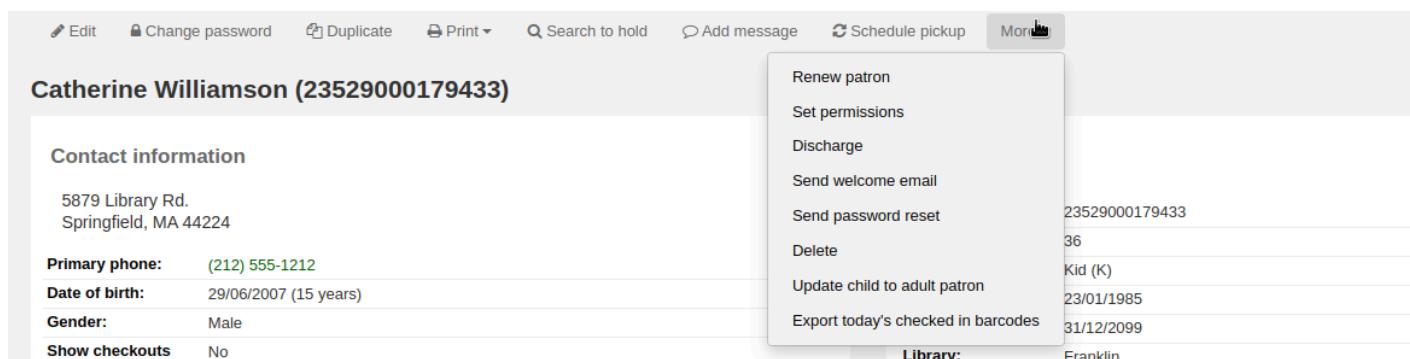
**Discharges**

[Housebound](#)

[ILL requests history](#)

[Recalls history](#)

Or click on the ‘More’ button and choose ‘Discharge’.



The screenshot shows a patron record for Catherine Williamson (23529000179433). At the top, there are several action buttons: Edit, Change password, Duplicate, Print, Search to hold, Add message, Schedule pickup, and More. The 'More' button is highlighted. A dropdown menu appears, listing: Renew patron, Set permissions, Discharge, Send welcome email, Send password reset, Delete, Update child to adult patron, Export today's checked in barcodes, and Library. To the right of the dropdown, there is a table with patron details: Borrowernumber (23529000179433), Age (36), Type (Kid (K)), Date of birth (23/01/1985), and Date of death (31/12/2099). The 'Library' field is set to Franklin.

If the patron can have a discharge generated, it will have a button that says ‘Generate discharge’

## Discharge

[Generate discharge](#)

If the patron has checkouts or holds, you'll see a message explaining why the patron cannot be discharged.

## Discharge

Cannot edit discharge: the patron has checked out items.

Once the letter is generated you will have a PDF to download.

### Note

You can customize this message in the [Notices and slips tool](#). The letter code is DISCHARGE.

### Note

You can style the PDF using the [NoticeCSS](#) preference, or add inline CSS in the DISCHARGE letter in the [Notices and slips tool](#).

The patron will have a [restriction](#) added to their account.

Checkouts (0)	Holds (0)	Recalls (0)	Article requests (0)	Claims (0/0)	Restrictions (1)	Clubs (0/2)
Type	Comment	Expiration	Created			
Discharge		Indefinite	24/05/2023	<a href="#">Remove</a>		
<a href="#">+ Add manual restriction</a>						

A history of discharges will be added to the 'Discharges' tab.

Checkouts (0)	Holds (0)	Recalls (0)	Article requests (0)	Claims (0/0)	Restrictions (1)	Clubs (0/2)
Type	Comment	Expiration	Created			
Discharge		Indefinite	24/05/2023	<a href="#">Remove</a>		
<a href="#">+ Add manual restriction</a>						
<b>Discharge</b>						
<a href="#">Generate discharge</a>						
<b>Already validated discharges</b>						
Requested	Validated					
24/05/2023 09:45	24/05/2023 10:26					

## Approving discharge requests

Patrons can [request discharges via the OPAC](#). Any pending discharges will be listed below the menu buttons on the main staff interface page, with other pending requests.

Article requests: 2

Suggestions pending approval: **Centerville: 3 / All libraries: 5**

Patrons requesting modifications: 1

Discharge requests pending: 1

Catalog concerns pending: 5

Checkout notes pending: 1

OPAC problem reports pending: 2

Clicking the pending discharge request link will open a screen where you can approve those discharges by clicking 'Allow'.

## Pending discharge requests

Showing 1 to 1 of 1 entries

Search:  

Patron	Library	Date requested	Allow
Schneider, Nicole	Franklin	24/05/2023	<input checked="" type="checkbox"/> Allow

Showing 1 to 1 of 1 entries

## Housebound patrons

There are three roles a patron can have in regard to housebound circulation:

- [borrower](#)
- [chooser](#)
- [deliverer](#)

### Important

In order to use the housebound module, the [HouseboundModule](#) and [ExtendedPatronAttributes](#) system preferences must be enabled.

## Chooser

The chooser is in charge of choosing the materials for the housebound patron.

If you have enabled the housebound module, with the [HouseboundModule](#) system preference, you will see that patrons now have a new section in their record called 'Housebound roles'.

# Henry Acevedo (23529000035676)

## Contact information

[Edit](#)

4345 Library Rd.  
Springfield, MA 44224

**Primary phone:** (212) 555-1212

**Date of birth:** 05/30/1958 (65 years)

**Gender:** Female

**Show checkouts to guarantor:** No

**Show charges to guarantor:** No

## Housebound roles

[+ Add](#)

Click the ‘Add’ button to mark this patron as a ‘Chooser’.

### Housebound roles

Chooser: Yes  No   
Deliverer: Yes  No

## Deliverer

The deliverer is in charge of delivering the chosen materials to the housebound patron on a specific day at a specific time.

In the ‘Housebound roles’, click the ‘Add’ button to mark this patron as a ‘Deliverer’.

### Housebound roles

Chooser: Yes  No   
Deliverer: Yes  No

## Housebound borrowers

To create a housebound profile for a housebound patron, click on the ‘Housebound’ tab in their record.

From there, you can edit their housebound profile information.

## Housebound details for Henry Acevedo (23529000035676)

### Manage housebound profile

Delivery day:  Required

Frequency:  Required

Preferred materials:

Subjects:

Authors:

Referral:

Notes:

- Delivery day: choose which day (or ‘Any’) the patron prefers to receive their delivery.
- Frequency: choose the frequency at which they want to receive their deliveries.

#### Note

The frequencies are managed through the HSBND\_FREQ list of [authorized values](#).

- Preferred materials: enter notes that will help the chooser choose appropriate documents for the housebound patron.

For example: books, dvds, magazines, etc.

- Subjects: if the housebound patron has a preference for particular subjects, enter them here. This will help the chooser select interesting documents for the patron.

For example: romance, cookbooks, thrillers, etc.

- Authors: if the housebound patron has favorite authors, enter them here.

For example: Danielle Steel, James Patterson, etc.

- Referral: if the housebound patron has a referral, enter it here.

- Notes: enter any other notes that may help the chooser or the deliverer.

Click the ‘Save changes’ button to save the housebound profile.

## Coordinating deliveries

To plan visits, go to the housebound patron’s record.

In their housebound tab, you will be able to create deliveries.

**Housebound details for Henry Acevedo (23529000035676)**

Delivery day:	Tuesday
Frequency:	Every week
Material:	DVD
Subjects:	Science fiction
Authors:	
Referral:	
Notes:	

**Deliveries**

Click on ‘Add a new delivery’.

**Housebound details for Henry Acevedo (23529000035676)**

Manage housebound deliveries

**Delivery details**

Date:	<input type="text"/> <span style="color: red;">X Required</span>
(MM/DD/YYYY)	
Time:	<input type="text"/> <span style="color: red;">Required</span>
Chooser:	<input type="text"/> <span style="color: red;">Required</span>
Deliverer:	<input type="text"/> <span style="color: red;">Required</span>

Fill out the information :

- Date: enter the date of the delivery.
- Time: select a time of day for the delivery. The choices are morning, afternoon, or evening.
- Chooser: select a chooser who will be in charge of selecting the materials for this housebound patron.

### Note

This list is populated by the patrons having the [chooser role](#).

- Deliverer: select a deliverer who will be in charge of picking up the materials and bringing them over to the housebound patron.

### Note

This list is populated by the patrons having the [deliverer role](#).

### Housebound details for Edna Acosta (23529001000463)

<b>Delivery day:</b>	Monday
<b>Frequency:</b>	Every week
<b>Material:</b>	Large print
<b>Subjects:</b>	Romance Fiction Mystery Thriller
<b>Authors:</b>	Danielle Steele James Patterson
<b>Referral:</b>	
<b>Notes:</b>	



#### Deliveries

Showing 1 to 1 of 1 entries

Show 20 entries		<< First	< Previous	Next >	Last >>	Search: <input type="text"/>	<input type="button" value="Clear filter"/>	Export
ID	Date	Chooser	Deliverer	Actions				
1	12/18/2023 (morning)	Henry Acevedo (2352900035676)	Henry Acevedo (2352900035676)					

Showing 1 to 1 of 1 entries << First < Previous Next > Last >>



## Note

Choosers and Deliverers can be notified of planned deliveries via [reports](#).

Example reports can be found in the SQL Reports Library at [https://wiki.koha-community.org/wiki/SQL\\_Reports\\_Patrons#Patron\\_Characteristics](https://wiki.koha-community.org/wiki/SQL_Reports_Patrons#Patron_Characteristics).

## Recalls history

If [recalls are enabled](#), active and past [recalls requested by the patron](#) will appear in this tab.

<b>Recalls history</b>							
<input checked="" type="checkbox"/> Show old recalls							
Showing 1 to 1 of 1 entries	Show 20 entries	<< First	< Previous	1	Next >	Last >>	Search: <input type="text"/> <input type="button" value="Clear filter"/>
Title	Placed on	Expires on	Pickup location	Status	Due date		
"Speaking of Operations--" Cobb, Irvin S.	07/13/2022	Never expires	Centerville	Requested	Due to be returned by 07/27/2022		
Showing 1 to 1 of 1 entries	<< First	< Previous	1	Next >	Last >>		

From here staff members can see the status of each recall and [manage them](#).

## Two factor authentication in the staff interface

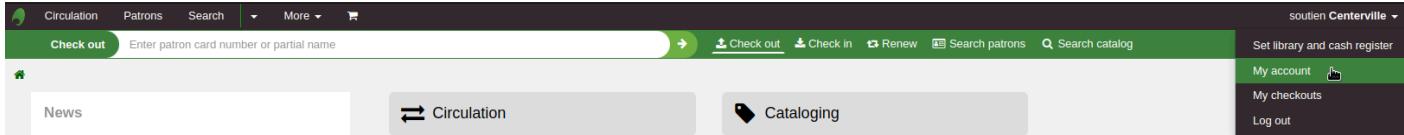
Koha offers two-factor authentication (2FA) for logging into the staff interface.

This two-factor authentication uses a time-based one-time password (TOTP). A TOTP is a password can only be used once and is only valid for a limited time.

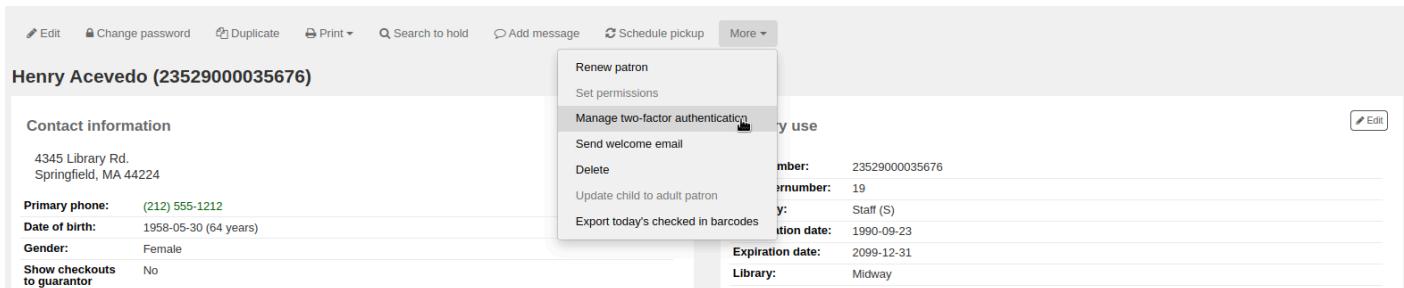
Users wanting to use the two-factor authentication must have an app to generate these TOTPs. Any authenticator app, such as Google Authenticator, andOTP, FreeOTP and many others can be used. Applications that enable backup of their 2FA accounts (either cloud-based or automatic) are recommended.

Turn on the two-factor authentication with the [TwoFactorAuthentication](#) system preference.

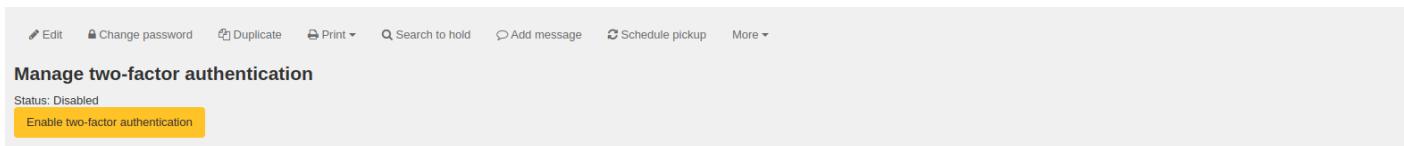
Once this is done, the staff user must go to their account by clicking their username at the top of the page and clicking ‘My account’.



The user must then go to More > Manage two-factor authentication.

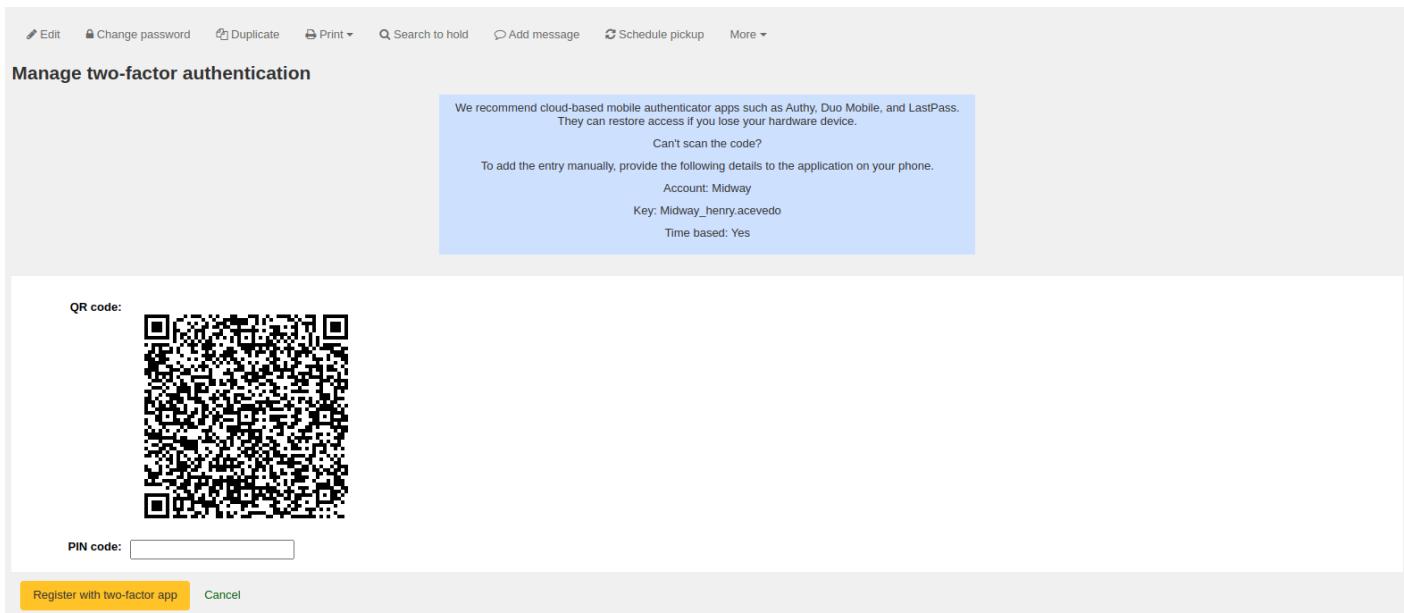


The status should be ‘Disabled’ when first going to this page.



Click on ‘Enable two-factor authentication’.

A QR code will be presented. This code must be scanned with an authenticator app (see above for suggestions).



## Note

If the app doesn't allow to scan QR codes, the page gives the credentials that can be entered manually (account, key, time-based).

Once the QR code is scanned, the app will return a time-based PIN code. The user must enter this PIN code in the PIN code field and click 'Register with two-factor app'.

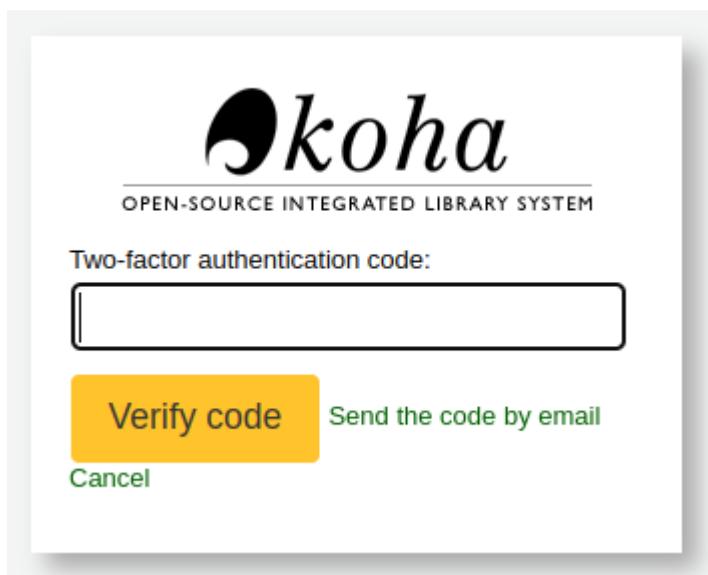
The status of the two-factor authentication will now be enabled.

### Note

An email will be sent to the user's email address to alert them that the two-factor authentication has been enabled on their account.

You can customize this message in the [Notices and slips tool](#). The letter code is 2FA\_ENABLE.

When this user tries to log in to the staff interface, they will have to enter their username and password, like always, but also a two-factor authentication code.



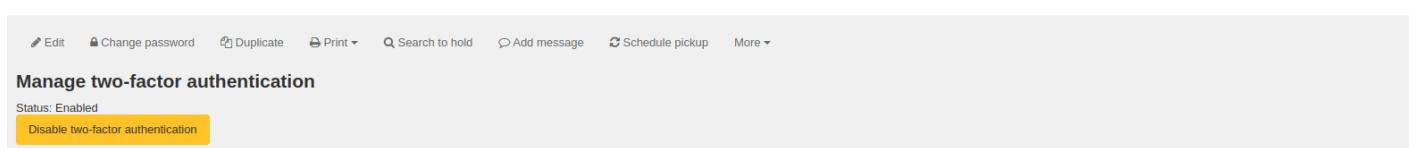
The user must then open their authenticator app, generate a time-based one-time password and enter it in the field in order to log in.

### Note

Alternatively, if the user doesn't have the app handy, they can click on 'Send the code by email', which will send them an email with a time-based one-time password for them to use.

The email is based on the 2FA OTP TOKEN notice template, which can be customized in the [Notices and slips tool](#).

Should the user wish to disable their two-factor authentication, they can go to their account in the staff interface, click More > Manage two-factor authentication and click 'Disable two-factor authentication'.



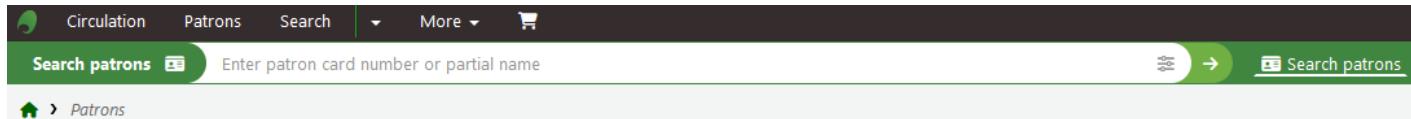
## Note

An email will be sent to the user's email address to alert them that the two-factor authentication has been disabled on their account.

You can customize this message in the [Notices and slips tool](#). The letter code is 2FA\_DISABLE.

## Patron search

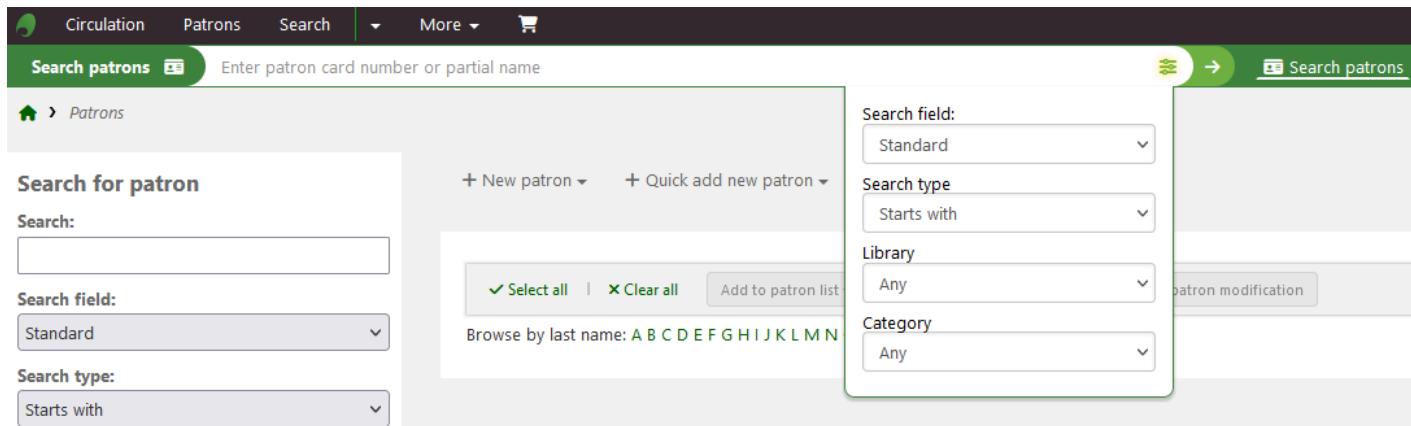
Clicking on the link to the Patron module will bring you to a search/browse screen for patrons. From here you can search for a patron by their name or their card number.



## Note

By default, the search is a 'Starts with' search, meaning that you have to search by the beginning of the patron's name or the beginning of the patron's card number. You can use the [DefaultPatronSearchMethod](#) system preference to change the patron search method to a 'Contains' search to be able to search for any part of the patron's name or cardnumber.

Clicking the 'More options' symbol to the right of the search box will open up an advanced patron search with more filters including the ability to limit to a specific category and/or library.



You can also filter your patron results using the search options on the left hand side of the page.

**Search for patron**

Search:

Search field: Standard

Search type: Starts with

Category: Any

Library: Any

**Actions:**

+ New patron | + Quick add new patron | Patron lists

Select all |  Clear all | Add to patron list | Merge selected patrons | Batch patron modification

Browse by last name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Depending on what you have chosen for the ‘Search fields’ you can search for patrons in various different ways.

Search patrons

Patrons

**Search for patron**

Search:

Search field: Standard

Search type: Starts with

Category: Any

Library: Any

**Actions:**

+ New patron | + Quick add new patron

Select all |  Clear all | Add to patron list

Browse by last name: A B C D E F G H I J K L M N

Search field dropdown menu (highlighted):

- Standard
- Surname
- Card number
- All emails
- Borrowernumber
- Username
- All phones
- Full address
- Date of birth
- Sort 1
- Sort 2
- First name
- Middle name
- Other name

- Standard:
  - Enter any part of their name, username, email address or barcode

### Note

You can use the system preference [DefaultPatronSearchFields](#) to define other fields to be used for searching with this option.

- Surname:
  - Search for the patron’s surname
- Card number:

- Search for the patron's card number
- All emails:
  - Search all of the defined patron fields for email addresses
- Borrowernumber:
  - Search for the Koha borrowernumber
- Username:
  - Search for the patron's username
- All phones:
  - Will search all of the defined patron fields for phone numbers. Enter the phone number exactly as it is in the system or by using spaces between each batch of numbers.
  - Example: To find (212) 555-1212 you can search for it exactly as it was entered or by searching for 212 555 1212
- Full address:
  - Search for the patron's address in all address fields
- Date of birth
  - Birth dates should be entered using the format set forth in the [dateformat](#) preference.
- Sort field 1
  - This is a custom field that libraries can use for any type of data about the patron.
- Sort field 2
  - This is a custom field that libraries can use for any type of data about the patron.
- First name:
  - Search for the patron's first name
- Middle name:
  - Search for the patron's middle name
- Other name:
  - Search all of the patron's other names fields

You can also choose to either search for fields that start with the string you entered or contain the string. Choosing 'Contains' will work like a wildcard search.

The screenshot shows the Patron Search interface. At the top, there are links for Circulation, Patrons, Search, More, and a shopping cart icon. Below that is a search bar labeled "Search patrons" with a barcode icon and a placeholder "Enter patron card number or partial name". To the right of the search bar is a green "Search" button with a magnifying glass icon. On the left, there's a breadcrumb trail: Home > Patrons. The main area is titled "Search for patron" and contains sections for "Search", "Search field" (set to "Standard"), "Search type" (set to "Starts with"), and a dropdown for "Library" and "Category", both set to "Any". There are buttons for "+ New patron" and "+ Quick add new patron". A central panel shows a list of letters from A to M with "Browse by last name" links. Below this is a "Select all" and "Clear all" button, and an "Add to patron list" button.

You can also browse through the patron records by clicking on the linked letters across the top.

Browse by last name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

If your search only returns one result, you will be taken directly to the patron's file. If your search returns more than one result, you will be given a list from which to choose.

The screenshot shows the Patron List interface. At the top, there are links for "+ New patron" and "+ Quick add new patron". Below that is a checkbox for "Patron lists". The main area shows a search bar with "Select all" and "Clear all" buttons, and an "Add to patron list" button. A link "Merge selected patrons" is also present. Below this is a "Browse by last name" section with letters A through Z. The text "Patrons found for: Standard containing 'Mar'" is displayed. It shows a table with 4 entries filtered from 55 total entries. The columns are: Card, Name, Date of birth, Library, Category, Expires on, Checkouts, Fines, and Notes. Each row has a checkbox in the first column and buttons for "Edit" and "Check out" in the last column. The entries are:

Card	Name	Date of birth	Library	Category	Expires on	Checkouts	Fines	Notes
<input type="checkbox"/> 23529000651225	Burton, Mary 8131 Library Rd. Santa Cruz, CA 21234	12/25/1977 (45 years)	Midway	Patron	12/31/2099	0 / 0	0.00	<a href="#">Edit</a> <a href="#">Check out</a>
<input type="checkbox"/> 23529000053836	Mcfarland, Marilyn 4600 Library Rd. Springfield, MA 44224		Springfield	Patron	12/31/2099	0 / 0	0.00	<a href="#">Edit</a> <a href="#">Check out</a>
<input type="checkbox"/> 23529000878885	Mcknight, Marie 4241 Library Rd. Centerville, CA 44262	08/12/2007 (15 years)	Springfield	Young Adult	12/31/2099	0 / 0	0.00	<a href="#">Edit</a> <a href="#">Check out</a>
<input type="checkbox"/> 23529000152273	Welch, Marcus 5601 Library Rd. Springfield, MA 44224		Franklin	Student	12/31/2099	0 / 0	0.00	<a href="#">Edit</a> <a href="#">Check out</a>

Showing 1 to 4 of 4 entries (filtered from 55 total entries)    « First    < Previous    **1**    Next >    Last »

## Note

You can customize the columns of this table in the [Table settings](#) section of the Administration module, under the patrons tab (table id: memberresultst).

Selecting one or more patrons from the list of results by using the checkbox in the leftmost column will show other features you can use for the selected patrons.

Select all |     Patrons selected: 2

Browse by last name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
 Patrons found for: Sta  
 New list 'Mar'

Showing 1 to 4 of 4 entries (filtered from 53 total entries)

Show 20 entries <<First < Previous 1 Next > >> Last Search:

Card	Name	Date of birth	Library	Category	Expires on
<input type="button" value="Card search"/>	<input type="button" value="Name search"/>	<input type="button" value="Date of birth search"/>	<input type="button" value="Library dropdown"/>	<input type="button" value="Category dropdown"/>	<input type="button" value="Expires on search"/>
<input checked="" type="checkbox"/> 23529000651225	Burton, Mary 8131 Library Rd. Santa Cruz, CA 21234	12/25/1977 (46 years)	Midway	Patron	12/31/2099
<input checked="" type="checkbox"/> 23529000053836	Mcfarland, Marilyn 4600 Library Rd. Springfield, MA 44224		Springfield	Patron	12/31/2099
<input type="checkbox"/> 23529000878885	Mcknight, Marie 4241 Library Rd. Centerville, CA 44262	01/26/2009 (15 years)	Springfield	Young Adult	12/31/2099
<input type="checkbox"/> 23529000152273	Welch, Marcus 5601 Library Rd. Springfield, MA 44224		Franklin	Student	12/31/2099

Showing 1 to 4 of 4 entries (filtered from 53 total entries) <<First < Previous 1 Next > >> Last

- Add to patron list:
  - Add the selected patrons to an existing '[patron list](#)' or create a new list
- Merge selected patrons:
  - Allows you to '[merge the selected patrons](#)'
- Batch patron modification:
  - Sends the selected patrons to the [batch patron modification tool](#)

## Communicating with patrons

Koha offers several options for communicating with patrons, some of which have already been covered in this chapter.

### OPAC notes

OPAC notes are added to the patron's file through the [add patron form](#) or the [edit patron form](#), in the 'Library set-up' section.

## Library setup

**Registration date:**  

(MM/DD/YYYY)

**Expiry date (leave blank for auto calc):**  

(MM/DD/YYYY)

**OPAC note:**

This message appears on this patron's user page in the OPAC

**Circulation note:**

This message displays when checking out to this patron

## OPAC/Staff interface login

**Username:**

**Password:**

Minimum password length: 8

**Confirm password:**

They show up in the '[Your summary](#)' section of the patron's online account in the OPAC.

[Home](#) / [Edna Acosta](#) / [Your summary](#)

### Important links

- [Koha Community Website](#)
- [Koha Wiki](#)

### Messages for you

- This is an OPAC note

Hello, Edna Acosta

[Click here if you're not Edna Acosta](#)

In the staff interface, OPAC notes will be in the 'Library use' section of the patron's file.

## Library use



**Card number:** 23529000035676

**Borrower number:** 19

**Category:** Staff (S)

**Registration date:** 09/23/1990

**Expiration date:** 12/31/2099

**Library:** Midway

**Sort field 1:** 0.36460167669188

**Sort field 2:** 0.33887459834933

**Username:** 23529000035676

**Password:** \*\*\*\*\*

**Password expires:** Never

**Protected:** Yes

**Circulation note:**

This is a circulation note

**OPAC note:**

This is an OPAC note

## OPAC messages

OPAC messages are added to the patron's file using the 'Add message' button.

Edit   + Add guarantee   Change password   Duplicate   Print   Search to hold   Add message   Schedule pickup   More ▾

Eva Dillon (23529000105040)

To leave a message that the patron will be able to see in the OPAC, choose "OPAC - Patron's name" in the 'Add a message for' field. Enter your message in the box, or choose a predefined message in the drop-down menu.

### Leave a message

**Add a message for:**  
OPAC - Ronnie Ballard ▾

**Predefined notes:**  
Select note ▾

✓ Save ✗ Cancel

## Note

Predefined messages are added in the BOR\_NOTES [authorized value category](#)

Once saved, the patron will be able to see the message in the '[Your summary](#)' section of their online account. The patron will also be able to see the date on which the message was added as well as the name of the branch. They will have the option to dismiss the message. This will hide the message from their OPAC account and mark it as read, but it will not delete the message.

### Your summary

A screenshot of a web page titled 'Your summary'. Under the heading 'Messages for you', there is a message card. The message text is: 'Please bring a proof of address on your next visit to the library.' It is attributed to 'Written on 15/05/2023 by Centerville'. Below the message is a green button labeled 'Dismiss' with a trash icon. At the bottom of the card, it says 'Hello, Ronnie Ballard' and 'Click here if you're not Ronnie Ballard'.

In the staff interface, OPAC messages are shown on the patron's detail page, at the top of the page just under the row of action buttons.

A screenshot of a web page showing a patron's detail. At the top, there is a row of action buttons: Edit, Add guarantee, Change password, Duplicate, Print, Search to hold, Add message, Schedule pickup, and More. Below this, there is a section titled 'Messages'. It shows a single message from '15/05/2023 Centerville (Caroline Cyr La Rose)' with the text: 'Please bring a proof of address on your next visit to the library.' There are 'Edit' and 'Delete' buttons next to the message. Below the message, there is a link '+ Add a new message'.

It will also appear on the checkout page, to the right of the checkout box.

A screenshot of a web page showing a checkout transaction. On the left, there is a 'Checkouts' section with a 'Checking out to Ronnie Ballard (23529000139858)' header. To the right of this, there is a 'Messages' section. It shows the same message from '15/05/2023 Centerville (Caroline Cyr La Rose)' with the text: 'Please bring a proof of address on your next visit to the library.' There are 'Edit' and 'Delete' buttons next to the message. Below the message, there is a link '+ Add a new message'.

If you need to edit the message, click the 'Edit' button next to the message, edit the text and click 'Save'.

## Warning

If you edit a message that has been dismissed by the patron, it will stay as 'Read' and the patron will not see your edit.

If the patron dismisses the message, a 'Read' mention with the date will appear next to the message in the staff interface to inform staff members that this message was read by the patron.

A screenshot of a web page showing a patron's detail. At the top, there is a row of action buttons: Edit, Add guarantee, Change password, Duplicate, Print, Search to hold, Add message, Schedule pickup, and More. Below this, there is a section titled 'Messages'. It shows a message from '15/05/2023 Centerville (Caroline Cyr La Rose)' with the text: 'Please bring a proof of address on your next visit to the library.' A small note next to the message says 'Read: 15/05/2023'. There are 'Edit' and 'Delete' buttons next to the message. Below the message, there is a link '+ Add a new message'.

## Advance notices and hold notices

If you have enabled the [EnhancedMessagingPreferences](#) system preference, you can set advance notices as well as hold notices when [adding a new patron](#) or [editing a patron](#).

If the [EnhancedMessagingPreferencesOPAC](#) system preference is set to ‘show’, patrons will be able to modify their messaging preferences in their online account.

Patron messaging preferences			
	Days in advance	Email	Digests only ⓘ
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	0 <input type="button" value="▼"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	-
Item check-in	-	<input type="checkbox"/>	-
Item checkout	-	<input type="checkbox"/>	-
Interlibrary loan ready	-	<input type="checkbox"/>	-
Interlibrary loan unavailable	-	<input type="checkbox"/>	-
Hold reminder	-	<input type="checkbox"/>	-
Interlibrary loan updated	-	<input type="checkbox"/>	-

- Item due: A notice on the day an item is due back at the library
  - Customize this notice by editing the DUE or DUEDGST notices in the [Notices and slips tool](#)
- Advance notice: A notice in advance of the patron’s items being due (the patron can choose the number of days in advance)
  - Customize this notice by editing the PREDUE or PREDUEDGST notices in the [Notices and slips tool](#)
- Hold filled: A notice when you have confirmed the hold is waiting for the patron, and when a curbside pickup is scheduled.
  - Customize the hold filled notice by editing the HOLD or HOLDDGST templates in the [Notices and slips tool](#).
  - Customize the curbside pickup scheduled notice by editing the NEW\_CURBSIDE\_PICKUP template in the [Notices and slips tool](#).
- Item check-in: A notice that lists all the items the patron has just checked in
  - Customize this notice by editing the CHECKIN notice in the [Notices & slips tool](#)
- Item checkout: A notice that lists all the items the patron has just checked out and/or renewed, this is an electronic form of the checkout receipt
  - Customize this notice by editing the CHECKOUT notice in the [Notices and slips tool](#)

### Note

If the [RenewalSendNotice](#) system preference is set to ‘Send’, this notice will be called ‘Item checkout and renewal’.

For renewals, the notice sent is RENEWAL.

- Interlibrary loan ready: A notice that is sent when an inter-library loan the patron requested has been fulfilled and is now ready for pickup.
  - Customize this notice by editing the ILL\_PICKUP\_READY notice in the [Notices and slips tool](#)

- This option will only appear if the [ILLModule](#) system preference is enabled.
- Interlibrary loan unavailable: A notice that is sent when an inter-library loan the patron requested has been cancelled because it was unavailable.
  - Customize this notice by editing the ILL\_REQUEST\_UNAVAIL notice in the [Notices and slips tool](#)
  - This option will only appear if the [ILLModule](#) system preference is enabled.
- Auto renewal: A notice that notifies the patron that their checkouts have been automatically renewed, or if there was a problem with their automatic renewal.
  - Customize this notice by editing the AUTO\_RENEWAL or AUTO\_RENEWAL\_DGST notice in the [Notices & slips tool](#)
  - This option will only appear if the [AutoRenewalNotices](#) is set to “according to patrons messaging preferences”
- Hold reminder: A notice that is sent a certain number of days after the [hold has been filled](#), in order to remind the patron that they have to pick it up.
  - Customize this notice by editing the HOLD\_Reminder notice in the [Notices and slips tool](#).
  - This notice requires the [holds\\_reminder.pl](#) cron job.
- Interlibrary loan updated: A notice that is sent when an inter-library loan the patron requested has been updated.
  - Customize this notice by editing the ILL\_REQUEST\_UPDATE notice in the [Notices and slips tool](#)
  - This option will only appear if the [ILLModule](#) system preference is enabled.

Patrons can choose to receive their notices as a digest by checking the ‘Digest only’ box along with the delivery method. A digest is a combination of all the messages of that type (so all items due in 3 days in one email) in to one email instead of multiple emails for each alert.

The delivery methods currently supported are:

- Email
- SMS (text messages)
- Automated phone call system
- Print

To generate the advance notices (advance notice and item due), you need to run the [advance\\_notices.pl cronjob](#). Then, the [process\\_message\\_queue.pl cronjob](#) will send the notices or the [gather\\_print\\_notices.pl cronjob](#) will gather them in a nice file you can print out and send out via regular mail.

## Overdue notices

Overdue notices are managed in [Notices & slips](#) and when they are sent is managed in [Overdue notice/status triggers](#).

Patrons cannot opt out of receiving overdue notices like they can other notices (such as [advance notices or hold notices](#))

To generate the overdue notices , you need to run the [overdue\\_notices.pl cronjob](#). Then, the [process\\_message\\_queue.pl cronjob](#) will send the notices or the [gather\\_print\\_notices.pl cronjob](#) will gather them in a nice file you can print out and send out via regular mail.