

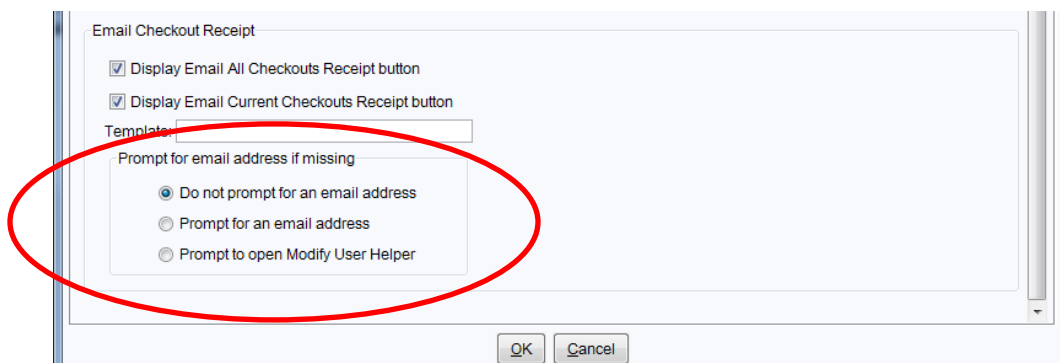
Email Receipt Buttons

Revised December 2017

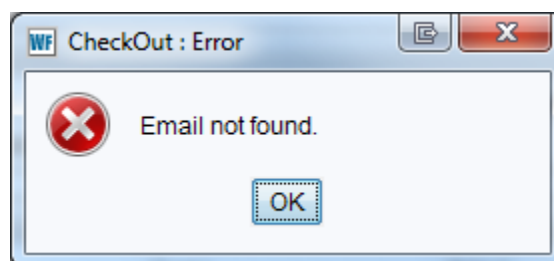
- Receipts can be emailed to a patron from the CheckOut wizard in the Common Tasks group.
- This feature is turned on for all RSA Online and Basic online member libraries.
- Receipts can be emailed to patrons even if your library does not use the print receipt function in WorkFlows.
- Email receipts are available only in the CheckOut wizard. This function is currently not available in the Renew User or Renew Item wizards.
- An email address must be in the patron's user record.
- The receipt will be email to all email addresses if a patron's user account contains multiple email addresses.

Three options are available for missing email addresses:

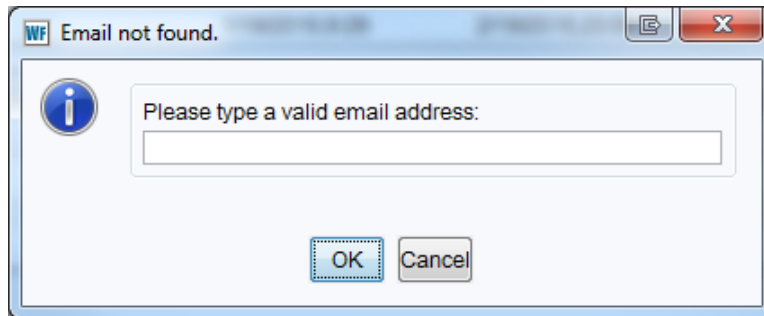
RSA has set the prompt option to "Prompt for an email address". If you library would like one of the other options, you must log into WorkFlows using the supervisor password to access the properties.



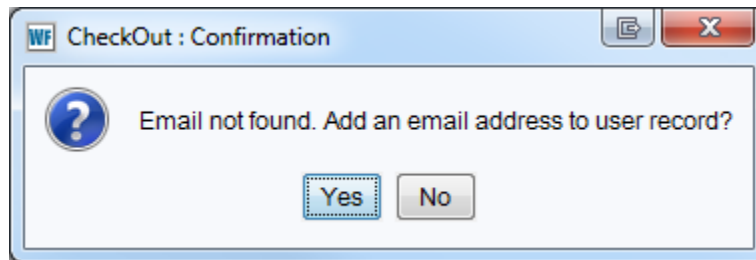
- Do Not Prompt for an email address option



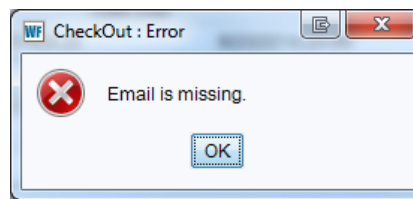
- Prompt for an email address option



- Prompt to open Modify User Helper option

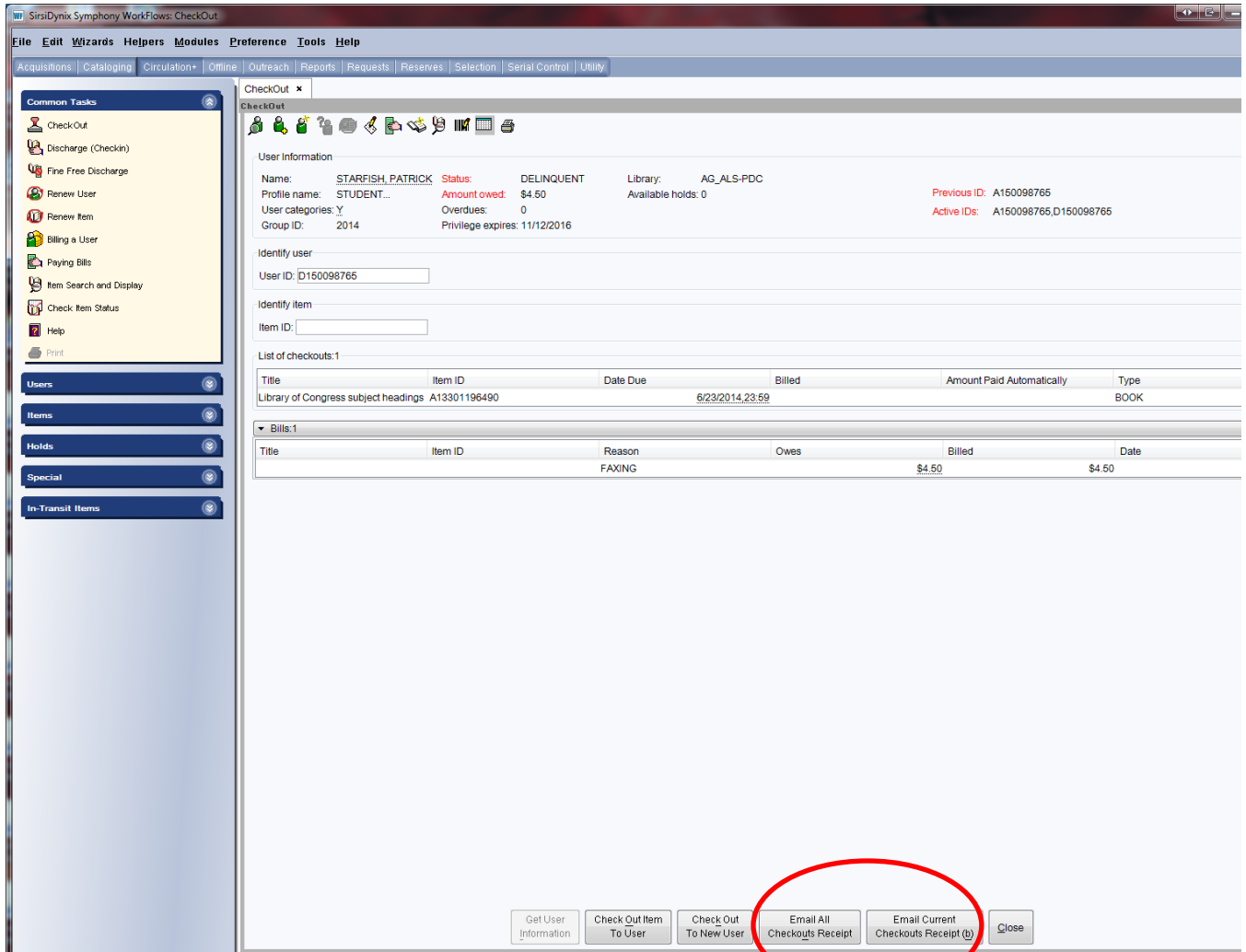


If a patron does not have an email address in their patron record the following box will appear after clicking either of the email receipt buttons:



- Patrons' email addresses may be entered into the patron's record during registration using the User Registration wizard.
- The Modify User or Confirm Address wizards, located in the Users group, may be used to add emails to existing patron records.
- The Confirm Address helper located in the CheckOut wizard may be used during checkout to verify and/or add an address to a patron's user record if no email address is contained in the primary address.
- Libraries may enter emails for reciprocal patrons per the RSA User Cards Policy: <http://www.alsrsa.org/client/RSAwebsite/search/asset/2283>.

Location of the email receipt buttons on the CheckOut screen.

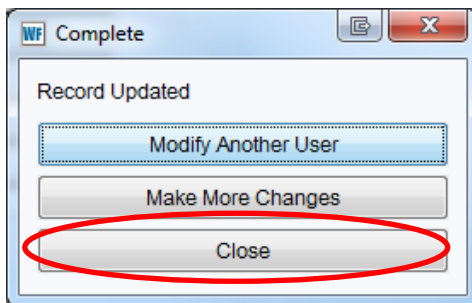


Modify User wizard:

1. Search for the patron's user record by scanning in the patron's user ID or using the User Search helper.

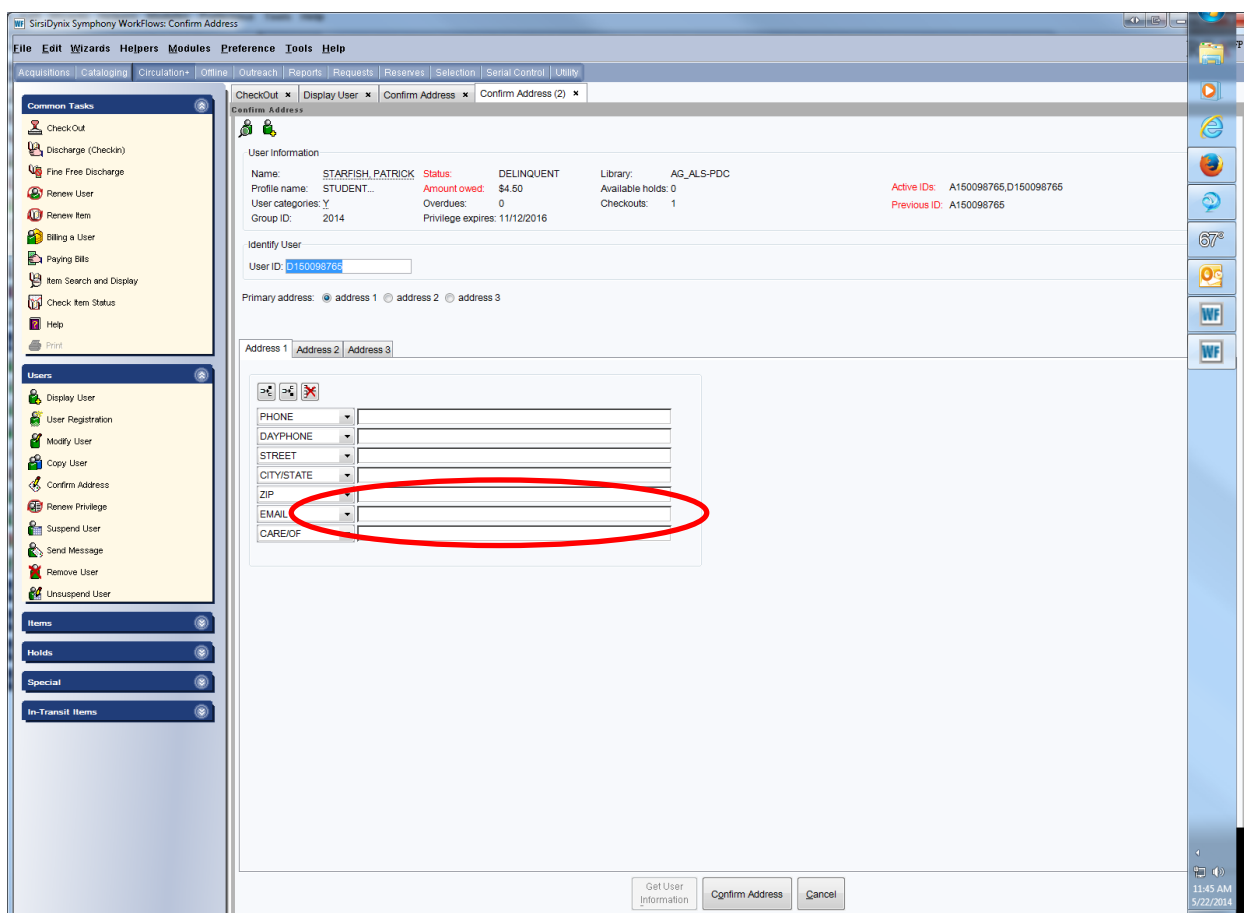
The screenshot displays the 'Modify User' wizard in the SirsiDynix Symphony interface. The user record for STARFISH, PATRICK (ID: D150098765) is shown. The 'Addresses' tab is active, displaying 'Address 1' and 'Address 2'. The 'EMAIL' field in 'Address 1' is highlighted with a red oval. The 'Save @' button at the bottom is also highlighted with a red oval.

2. Go to the Addresses tab.
 - a. Enter the patron's email address in the Email box on Address 1.
 - b. The email address may be entered in upper or lower case or a combination of the two.
 - c. Additional email address may be entered by separating the email addresses with a comma and no spaces (starfish@gmail.com,pstarfish@yahoo.com). An emailed receipt will go to all email addresses entered into the same email box.
3. Click on the Save button on the bottom of the screen to save the email address
4. Click on the Close button on the Complete popup box.

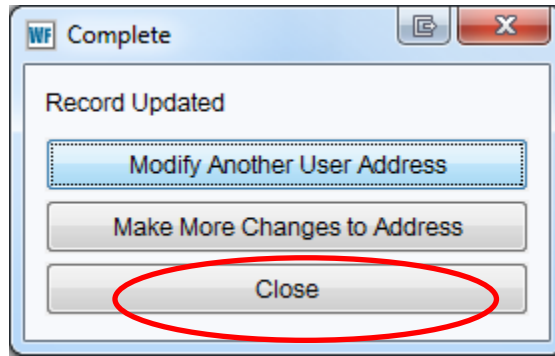


Confirm Address wizard:

1. Search for the patron's address information by scanning in the patron's user ID or using the User Search helper.



2. Go to the Address 1 tab.
 - a. Enter the patron's email address in the Email box
 - b. The email address may be entered in upper or lower case or a combination of the two.
3. Click on the Confirm Address button on the bottom of the screen to save the email address.
4. Click on the Close button on the Complete popup box

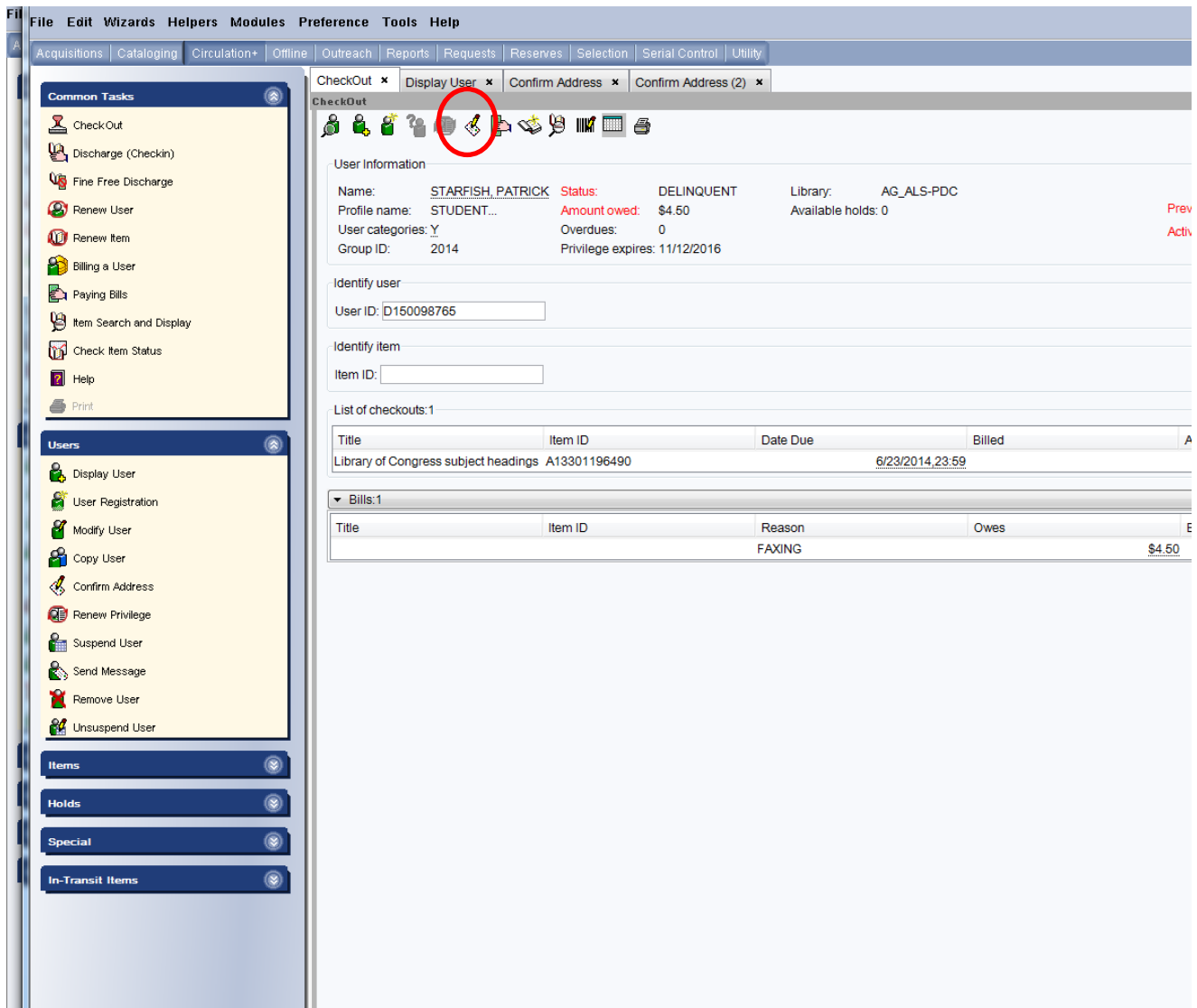


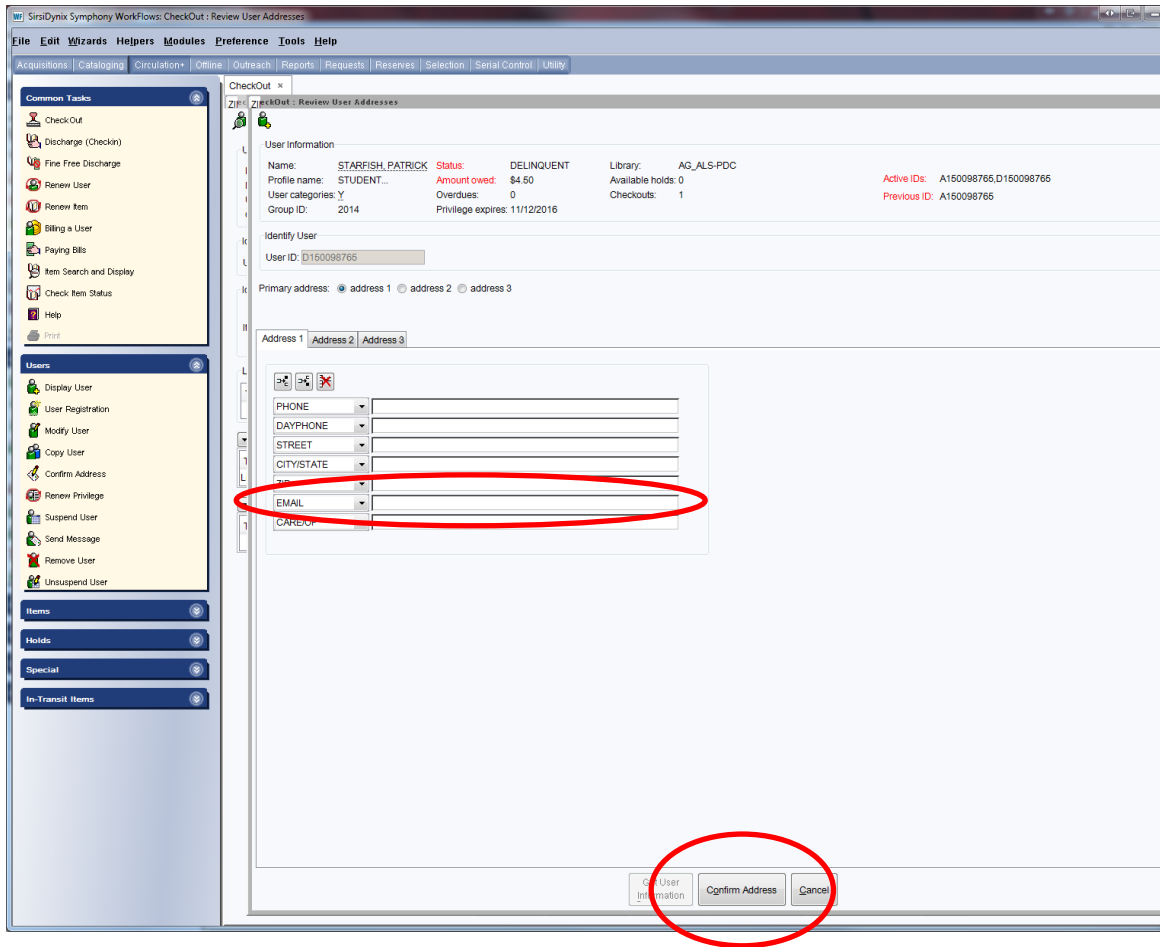
Confirm Address



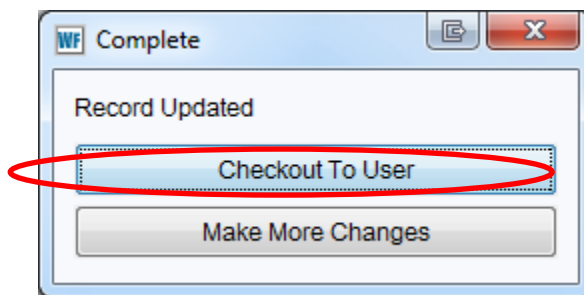
helper:

1. Click on the Confirm Address helper on the top of CheckOut wizard.





2. Go to the Address 1 tab.
 - c. Enter the patron's email address in the Email box
 - d. The email address may be entered in upper or lower case or a combination of the two.
3. Click on the Confirm Address button on the bottom of the screen to save the email address.
4. Click on the Checkout to User button to close the Complete popup box.



Email buttons:

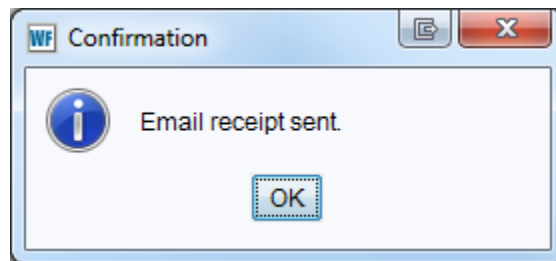
Email All Checkouts Receipt:

- Clicking this button will send an email of all items currently checked out on the patron’s record
- No items have to be charged out during the current checkout sessions for a list of currently checked out items to be email to the patron.

Email Current Checkouts Receipt:

- Only items charged out during the current checkout session will be email to the patron

After either the Email All Checkout Receipt or the Email Current Checkouts Receipt button has been click in the Checkout wizard and an email has been sent, the following popup box will appear:



Click the OK button.

Below is an example of the email your patron will receive in their email account: STARFISH, PATRICK [D150098765],The following items are checked out:

Title	Author	Call Number	Item ID	Date Charged	Date Due
Library of Congress subject headings / Subject Cataloging Division, Processing Department	Library of Congress	025.49 LIB 2001 ED. 24 V.5	A13301196490	22 May 2014	23 Jun 2014

Please note that the list above may only include today's charges and not previously charged items. If you have any questions, please contact your library.

Questions??

Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083