

Alma Essentials: Fulfillment

NOTES AND BLOCKS

Hello, in the last session you learned how to return items for a patron. In this tutorial you will learn how to place and view notes, as well as how to add and override blocks on a patron's account.

A patron just called to say that they left their umbrella at the library.

To view and add notes to their account you'll go to Fulfillment > Manage Patron Services. Enter their barcode and here he is.

You can see that Russell already has a note on his account... here. To add a new note you'll click "Edit Notes" to open the "User Details" page. Now you can see the original note, and let's create a new one by clicking "Add Note".

In the form you'll add your note that Russell forgot his umbrella; and you can also add a type of note, and designate whether or not it will be viewable to the user. Checking "Pop up note", will create a pop up when the user account is opened next. When you're done click "Add and close". Click "Save" and you are returned to the patron's account.

And click "Done" when you're finished.

Depending on your library's policies you may need to add a manual block to a patron's account.

To do so you can use the persistent search bar, in this case you know the patron's name, so you'll enter it and click the magnifying glass or enter on your keyboard to search.

When the page loads, click the "Blocks" tab. Open the "Add Block" menu. Now you can select a description. The expiry date and note fields are optional. When you're done click "Add and close", and then "Save".

Now if you go to Fulfillment > Manage Patron Services, enter Lois' barcode... a popup with the block will appear.

If you click "OK", Lois' patron account will open but you will get a popup to override when you try to check out an item. If you click "Override" here, you will be able to checkout items without warning popups when checking out materials.