



# **SWAN Notifications from the Ground Up**

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Support

# Agenda

- Notices, what notices?
- When do they go out?
- Delivery methods - how it's determined?
- Languages
- MessageBee?
  - Reporting
  - Failures
  - Searching/Verification of Notice Sent
  - Templates
  - SMS Messaging
- How to Contact
- Q&A

## Notices?

### **What do we send notices for?**

- Holds
  - Hold Pickup
  - Hold Reminder
  - Hold Cancellation
  - Hold Expire
- Courtesy/Overdues
  - Courtesy sent 2 Days prior to due date
  - 1<sup>st</sup> Overdue sent after 7 days
  - 2<sup>nd</sup> Overdue sent after 21 days
- Bills - After 42 days from due date

## Schedule



## Notice Schedule

6:00 AM - Hold Cancellation & Hold Expiration

8:30 AM - Courtesy

9:00 AM - Bill

11:00 AM - Overdues

2:00 PM - Hold Pickup

5:00 PM - Hold Pickup Reminder

## Delivery Method

### **How do we send notices?**

- Bills (Email and \*Print)
- Holds (SMS, Email and Voice)
- Courtesy (SMS and Email)
- Overdue (SMS, Email and Voice)

*\*Bill notices are the only notices that are sent in print and only if the patron doesn't have an email address in their record.*



# Languages

- Phone calls are in English only
- Email and SMS are sent out in 3 languages
  - English
  - Spanish
  - Polish
- WorkFlows > Modify User > Demographics tab > Language
- Wording is determined by the library in MessageBee
  - Default wording can be found at <https://support.swanlibraries.net/documentation/64674>

# Delivery Method - SMS

Basic Info | Privilege | Demographics | Addresses | Extended Info | SMS Notice Contact Info | User groups

### Phone Numbers

Label	Country	Phone Number	Overdue Notice	Hold Pickup Notice
My Cell	United States	1234567890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- There are 2 places SMS notices can be activated:
  - WorkFlows under the SMS Notice Contact Info tab
  - Aspen > Account Settings > Text Message Settings

My Account

Checked Out Titles  
» Physical Materials 0  
» Libby 0  
» Boundless 0

Titles On Hold  
» Physical Materials 0  
» Libby 0  
» Boundless 0

Fines \$1.00  
Your Library Card

Recommended For You  
» Titles You Rated 0  
» Not Interested In Titles 0

Your Lists  
Your Searches  
Your Events  
Checkout History 0

Account Settings

Your Preferences  
Contact Information  
**Text Message Settings**  
Linked Accounts  
Reset PIN  
Libby Options  
Boundless Options

[Catalog Home](#) » [My Account](#) » Text Message Settings

## Text Message Settings

Phone Label (ex. my cell)	Phone Number	Country Code	Alerts to Receive	
TEST	999999999	United States	<input checked="" type="checkbox"/> Overdue Notices <input checked="" type="checkbox"/> Hold Pickup Notices	Delete

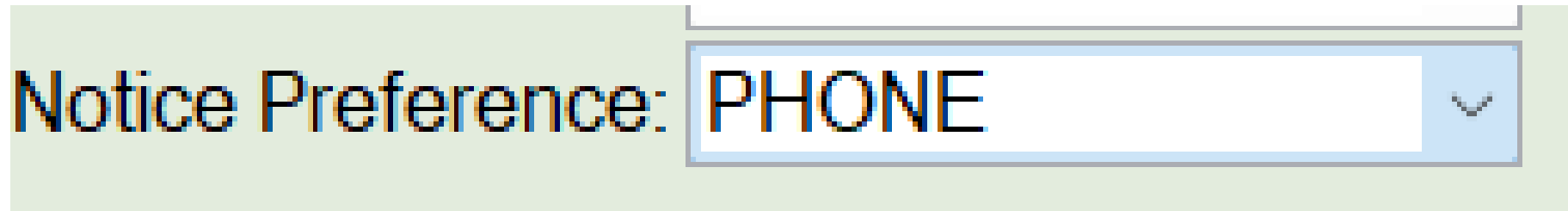
Add Phone Number

Update Settings



# Delivery Method – Phone

- Found under the Demographics tab in WorkFlows

A screenshot of a software interface showing a 'Notice Preference' dropdown menu. The text 'Notice Preference:' is on the left, followed by a white rectangular box containing the word 'PHONE' in blue capital letters. To the right of the box is a blue square button with a white downward-pointing chevron. The entire element is set against a light green background.

Notice Preference: PHONE

- \***PHONE** is the only selection our notice process will look at in the Notice Preference drop-down field. All other values have no bearing on notice generation.
- Must also have a valid phone # in the PHONE field under the address tab

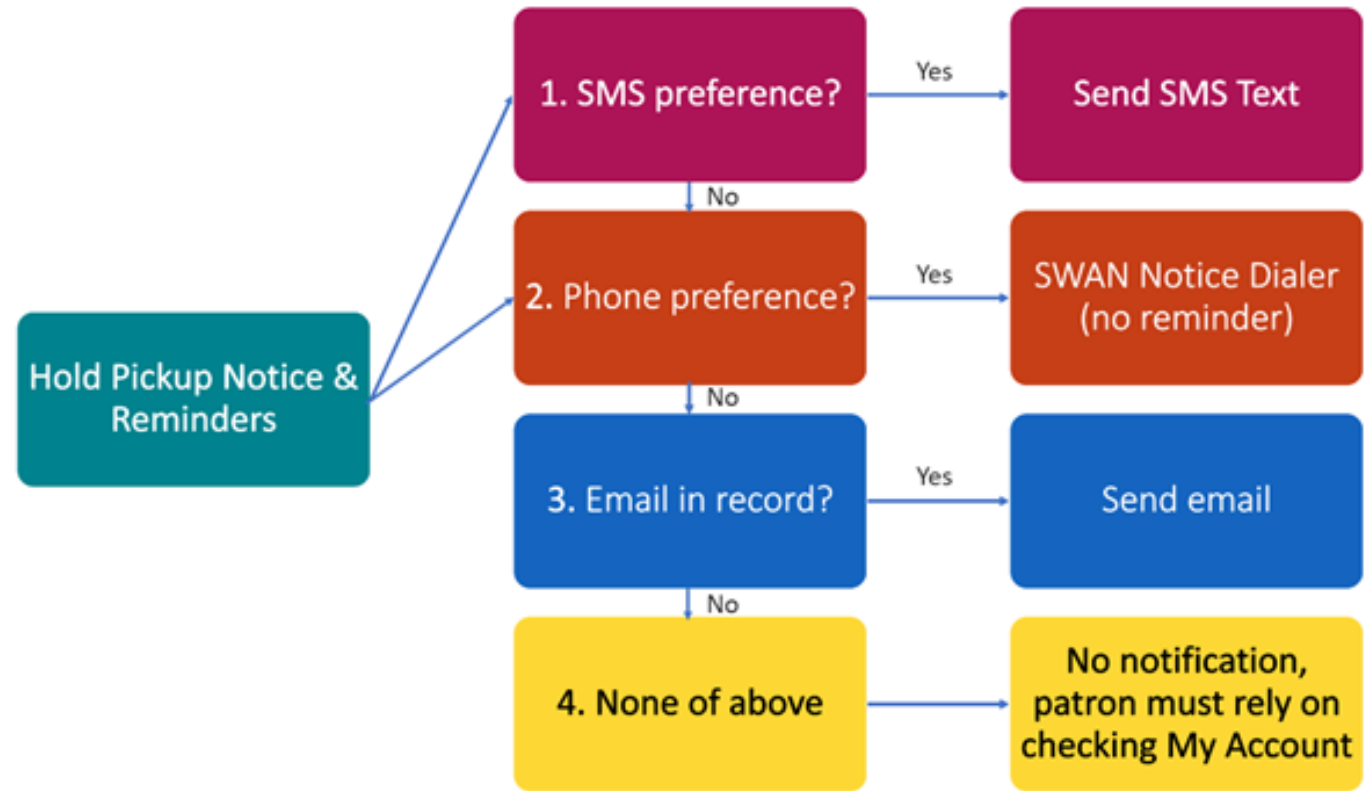


# Delivery Method - Email

ALT_PHONE	▼	
EMAIL	▼	myemail@yahoo.com
BUS/SCHOOL	▼	

\*Found under the Address tab

# Delivery Method - Holds

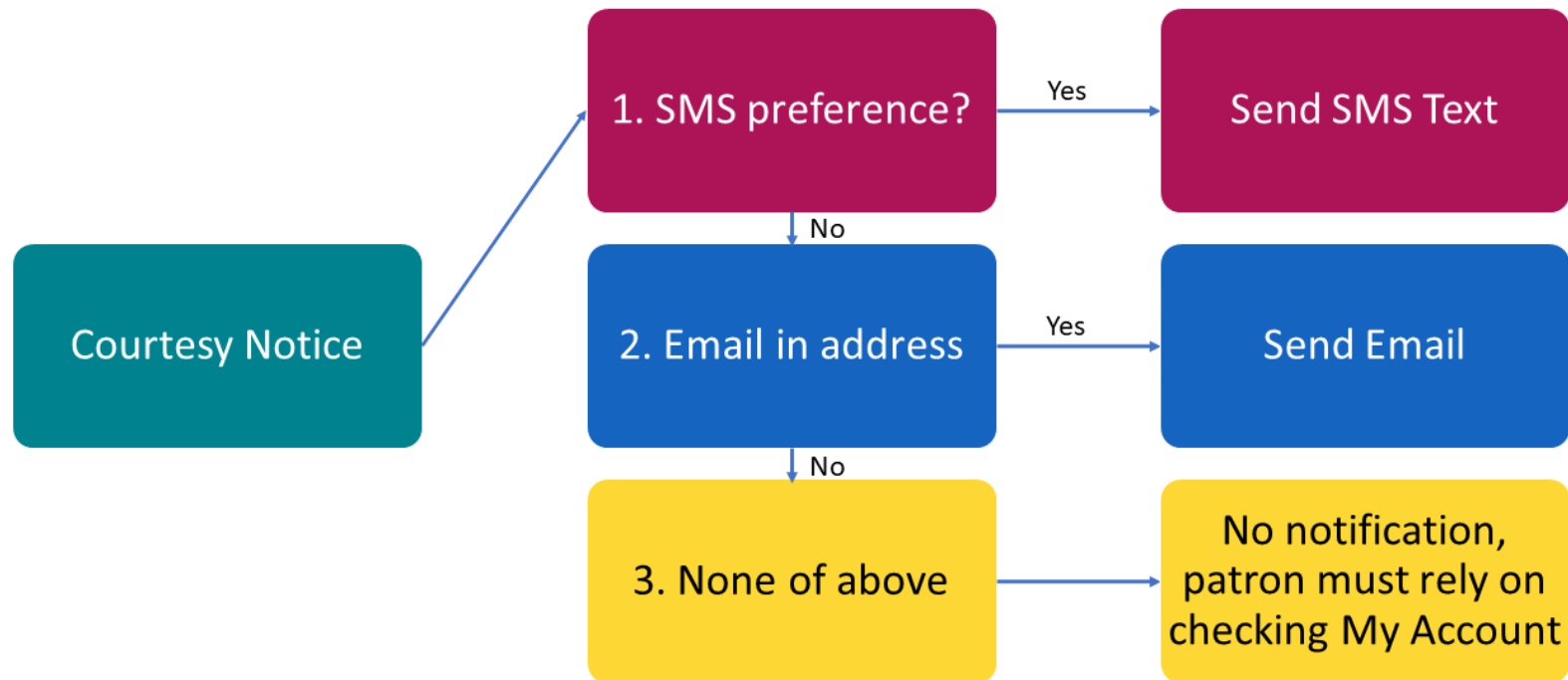


# Delivery Method – Holds Cancellation



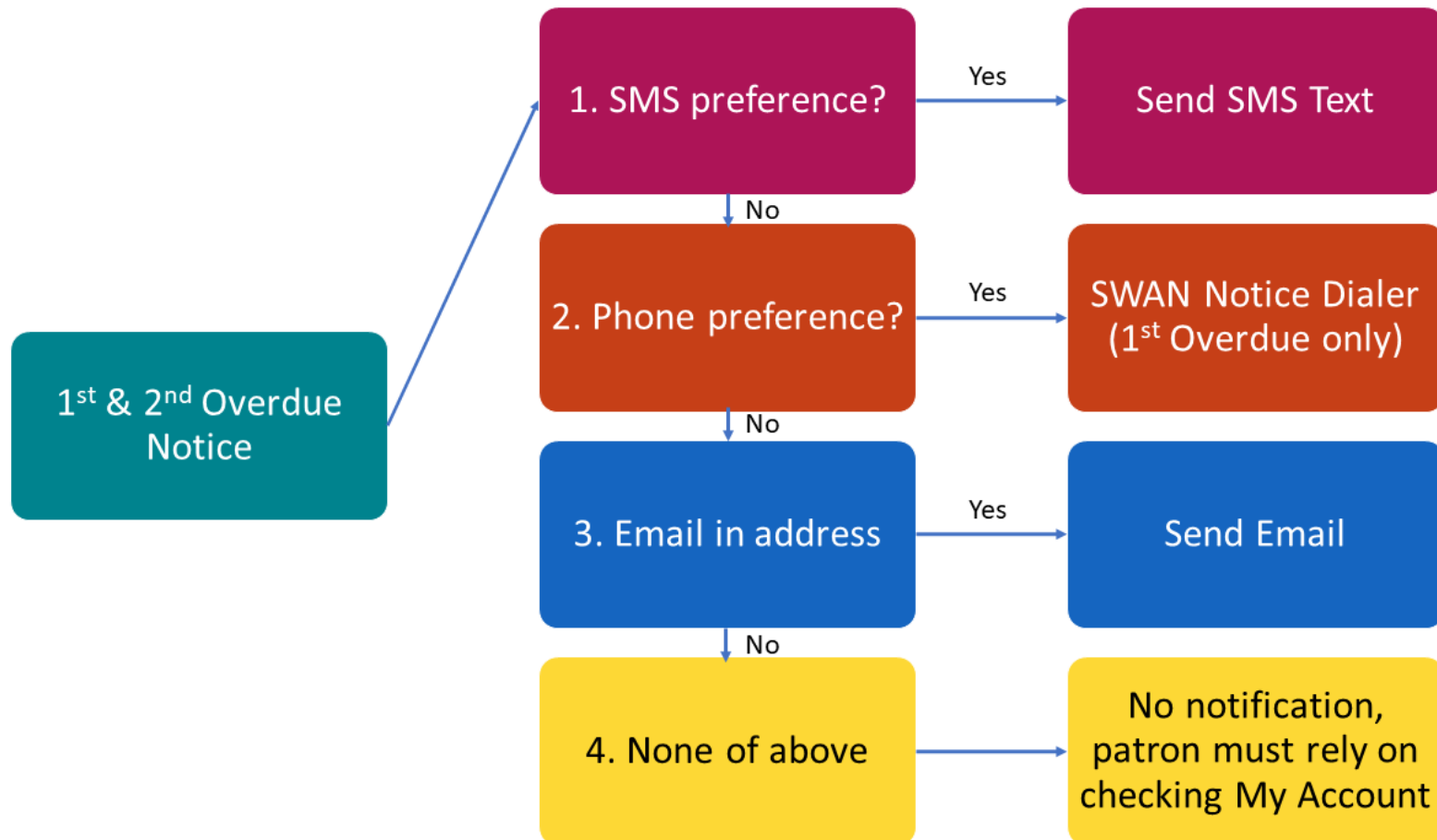
<https://support.swanlibraries.net/documentation/64674>

# Delivery Method - Courtesy

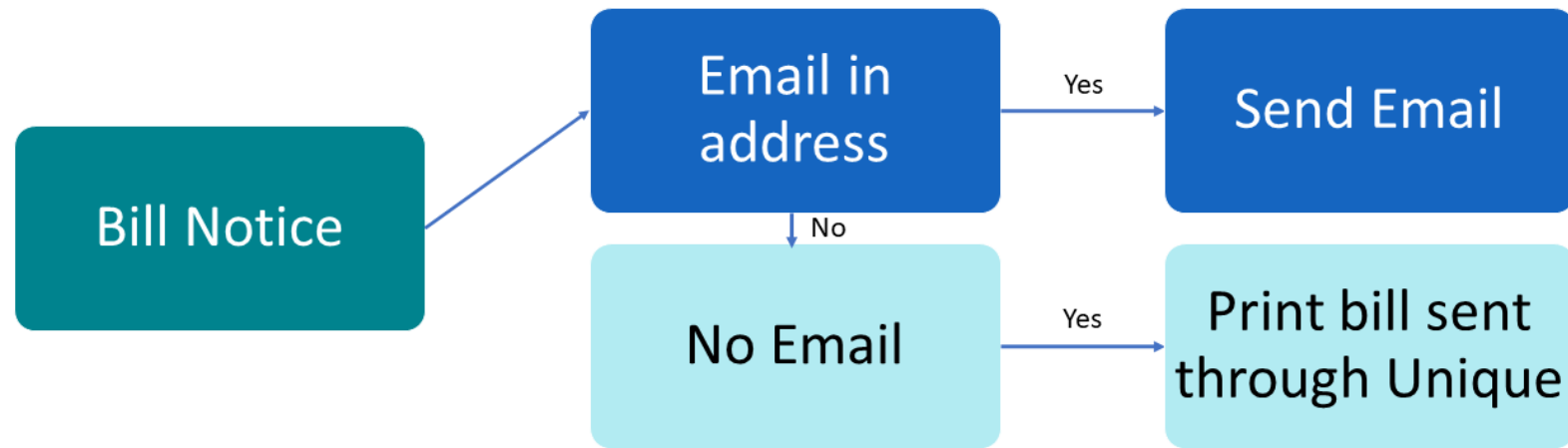


<https://support.swanlibraries.net/documentation/64674>

# Delivery Method - Overdues



# Delivery Method – Bills



<https://support.swanlibraries.net/documentation/64674>

# Notices - Notice Failures Part 1

- Notices that failed to be delivered will be included in a report digest emailed to your library.
- The digest is delivered to each library's aliased abc@swanlibraries.net email address
- The failures are included as an attachment in an Excel spreadsheet

	A	B	C	D	E	F
1	Email	Phone	Barcode	Reason	Date	Communication Name
2		null		550 5.1.1 The email account that you tried to reach does not exist. Please try double-checking the recipient's email address for typos or incorrect domains.	2023-04-18T16:19:00.161Z	SWS - 1st Overdue
3		null		550 5.2.1 <[REDACTED]>... Addressee unknown, relay=[REDACTED]	2023-04-18T19:19:18.272Z	SWS - Hold Pickup
4		null		452 4.2.2 The email account that you tried to reach is over quota. Please direct the recipient to https://support.google.com/mail	2023-04-18T19:19:15.456Z	SWS - Hold Pickup
5				Carrier Rejected as Invalid Destination Address	2023-04-18T19:19:07.841Z	SWS - Hold Pickup SMS

# Surprise, Pop Quiz!





# Notice Preference – Quiz

**1:** A patron has an email address and PHONE in their Notice Preference field. They don't have any SMS selections. What type of notice would they get for hold pickup and overdue notifications?

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**1:** A patron has an email address and PHONE in their Notice Preference field. They don't have any SMS selections. What type of notice would they get for hold pickup and overdue notifications?

**A:** They would receive a phone call for both.

# Notice Preference – Quiz

**2:** The patron doesn't have PHONE in their Notice Preference field. They have an email address in the email field under the Address tab. Under the SMS tab overdues is checked, but holds aren't. What type of notice would the patron receive for each?

# Notice Preference – Quiz

**2:** The patron doesn't have PHONE in their Notice Preference field. They have an email address in the email field under the Address tab. Under the SMS tab overdues is checked, but holds aren't. What type of notice would the patron receive for each?

**A:** They would receive a text message for courtesy and overdues, but email for their hold pickup notices.

# Notice Preference – Quiz

**3:** The patron is being sent a bill notice. They do not have an email address in their user record. Will they receive a notice and if so which one?

# Notice Preference – Quiz

**3:** The patron is being sent a bill notice. They do not have an email address in their user record. Will they receive a notice and if so which one?

**A:** Yes, they would receive a print notice.

# Notice Preference – Quiz

**BONUS:** The patron doesn't have any selections under the SMS tab, nor a selection of PHONE in their Notice Preference tab nor an email address in the email field. How would the patron be notified for available holds and overdues?

# Notice Preference – Quiz

**BONUS:** The patron doesn't have any selections under the SMS tab, nor a selection of PHONE in their Notice Preference tab nor an email address in the email field. How would the patron be notified for available holds and overdues?

**A:** They would need to check in their online account either through Aspen or the SWAN + Library app.





**SWAN**  
LIBRARY SERVICES

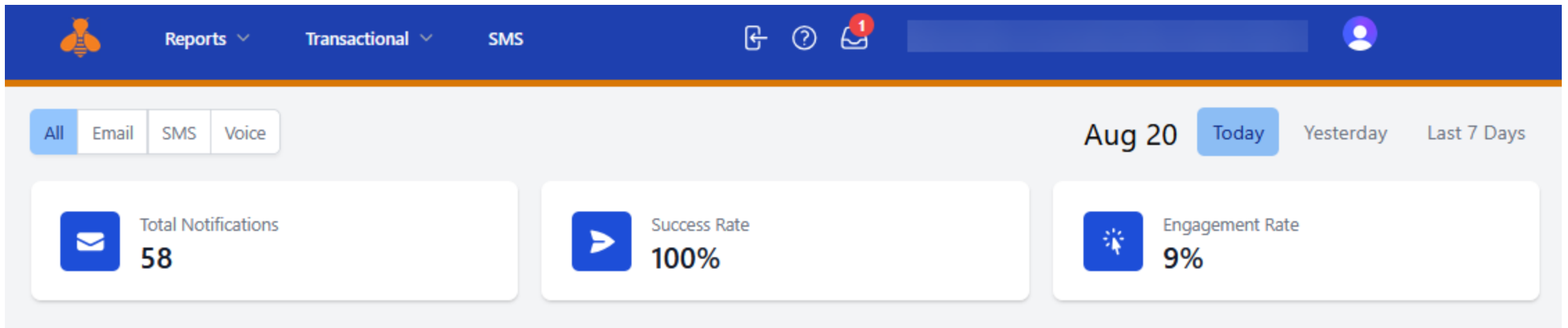


**MESSAGE BEE**

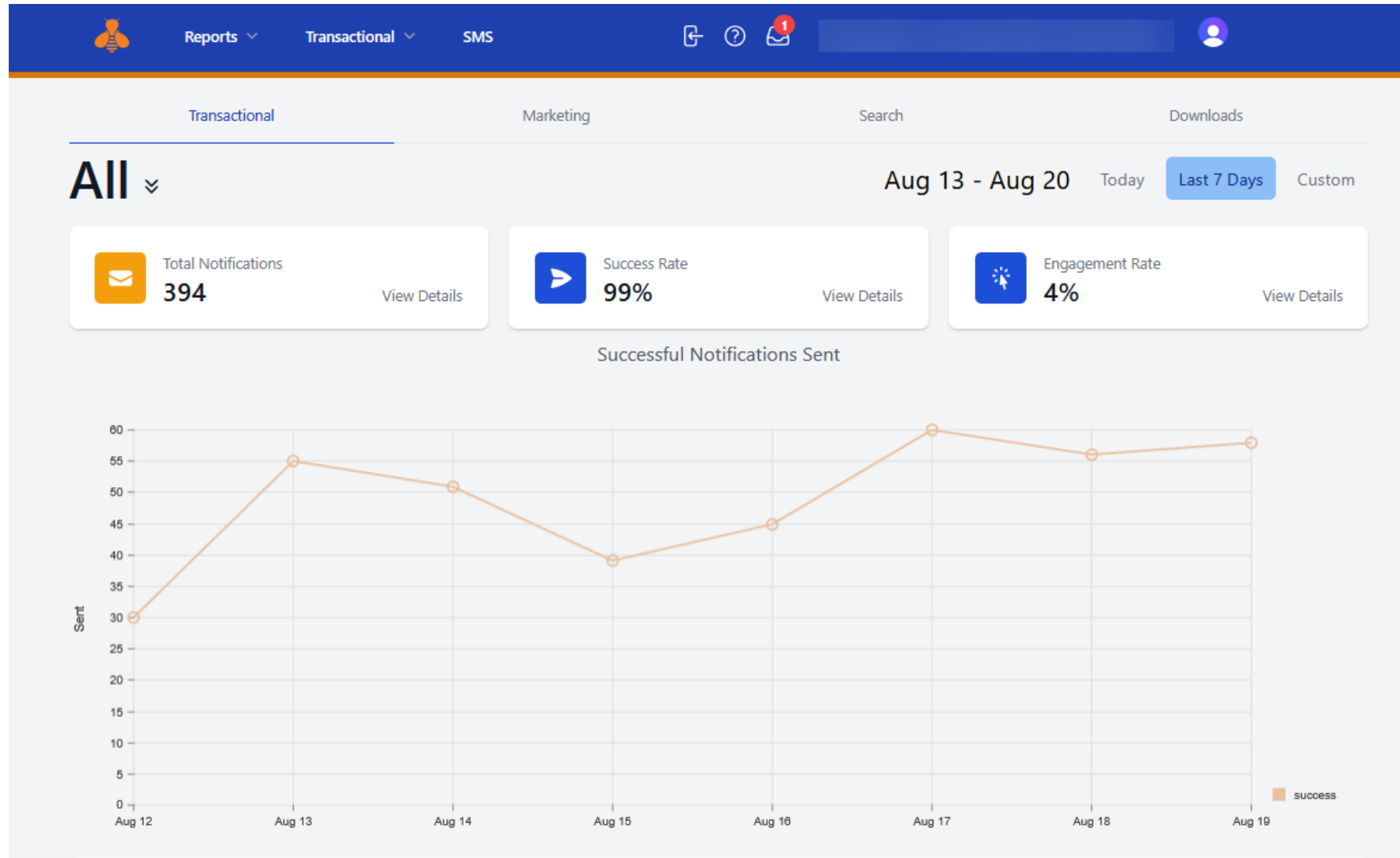
# What is MessageBee?

- MessageBee is a service by Unique that sends the notices generated in SWAN to your patrons.
- Each library has their own MessageBee portal which allows library staff to:
  - Gather statistics on notices
  - View failures at a quick glance
  - Search on patron notice history
  - Modify your library's notice templates
  - Communicate with patron via text messaging
- URL: <https://app.messagebee.uniquelibrary.com>

# MessageBee – Home Page



# MessageBee - Statistics



# MessageBee – Statistics (Broken down by notice)

Channel	Notification Type	Communication					Days	Weeks	Months	Export Results
Date	Sent	Delivered	Failed	OptOut	Opens	Clicks				
<b>BVD - 1st Overdue</b>										
08/12/2025	2	2	0	0	2	0				
08/13/2025	2	2	0	0	2	0				
08/14/2025	1	0	1	0	0	0				
08/15/2025	6	5	1	0	1	0				
08/16/2025	2	2	0	0	0	0				
08/18/2025	3	3	0	0	3	0				
08/19/2025	1	1	0	0	0	0				
<b>Total</b>	<b>17</b>	<b>15</b>	<b>2</b>	<b>0</b>	<b>8</b>	<b>0</b>				
<b>BVD - 2nd Overdue</b>										
	<b>10</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>				
<b>BVD - Bill</b>										
	<b>6</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>1</b>				
<b>BVD - Courtesy</b>										
08/12/2025	9	9	0	0	5	0				
08/14/2025	3	3	0	0	2	1				
08/15/2025	4	4	0	0	4	0				

# MessageBee – Notice Failures Part 2

Date	Email/Phone	Library Acct. #	Communication	Reason
08/18/2025 02:34 pm			PFS - Hold Pickup	Opt out
08/18/2025 09:04 am			PFS - Courtesy SMS	Carrier Rejected Message
08/17/2025 05:09 pm			PFS - Hold Pickup Reminder	550 5.5.1 Recipient rejected - O...
08/16/2025 05:24 pm			PFS - Hold Pickup Reminder	Opt out
08/16/2025 05:24 pm			PFS - Hold Pickup Reminder	Opt out
08/16/2025 09:09 am			PFS - Courtesy	550 5.1.1 The email account tha...
08/15/2025 02:11 pm			PFS - Hold Pickup SMS	Invalid phone number.

- You can search MessageBee's help for "failure and error codes" to learn what each reason means

# MessageBee - Searching

Transactional

Marketing

Search

Downloads

All

2025-06-01 ~ 2025-08-05

Today

Last 7 Days

Custom

Search By

Library Acct. #

All

Exact

Search

Advanced Filters

Export Results

	Date	Email/Phone	Library Acct. #	Channel	Communication	Final Status	Preview
-	07/28/2025 09:05 AM			SMS	CSD Courtesy SMS	Delivered	
	07/28/2025 09:05 AM - <b>Sent</b> 07/28/2025 09:16:34 AM - <b>Delivered</b>						

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# MessageBee - Searching

All

2025-06-01 ~ 2025-08-05

Today

Last 7 Days

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Search

Advanced Filters

Export Results

	Date	Email/Phone	Library Acct. #	Channel	Communication	Final Status	Preview
⊖	08/04/2025 11:19 AM	-		Voice	OLS - Overdue Phone	Delivered	✉
08/04/2025 11:19 AM - <b>Sent</b>							
08/04/2025 11:24:42 AM - <b>Delivered</b>							



# MessageBee - Searching

Transactional

Marketing

Search

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All

2025-06-01 ~ 2025-08-05

Today

Last 7 Days

Custom

Search By

Library Acct. #

All

Exact

Search

Advanced Filters

Export Results

Date	Email/Phone	Library Acct. #	Channel	Communication	Final Status	Preview
-	08/04/2025 11:19 AM		Email	GVD - 2nd Overdue	Delivered	
08/04/2025 11:19 AM - Sent						
08/04/2025 11:31:10 AM - Delivered						
08/04/2025 11:41:20 AM - Open						
08/04/2025 11:59:55 AM - Open						
+	07/21/2025 11:15 AM		Email	GVD - 1st Overdue	Delivered	
+	07/14/2025 08:49 AM		Email	GVD - Courtesy	Delivered	
+	07/12/2025 09:05 AM		Email	GVD - Courtesy	Delivered	
+	07/11/2025 05:29 PM		Email	GVD - Hold Pickup Reminder	Delivered	

# MessageBee – Patron Says they Aren't Receiving Notices

- Search in MessageBee first to confirm delivery. If MessageBee shows they opted out the block would need to be removed from Communication Preferences

## Communication Preferences Report

See your customers' communication preferences, and modify them if necessary.

☐ No Preferences

Search By  
Email



notices@swanlibraries.n...

Search

Email	Phone	Marked as Spam?	SMS Opt Out?	Last Updated	Modify
				05/12/2025, 02:29 PM	
				06/10/2023, 11:44 AM	

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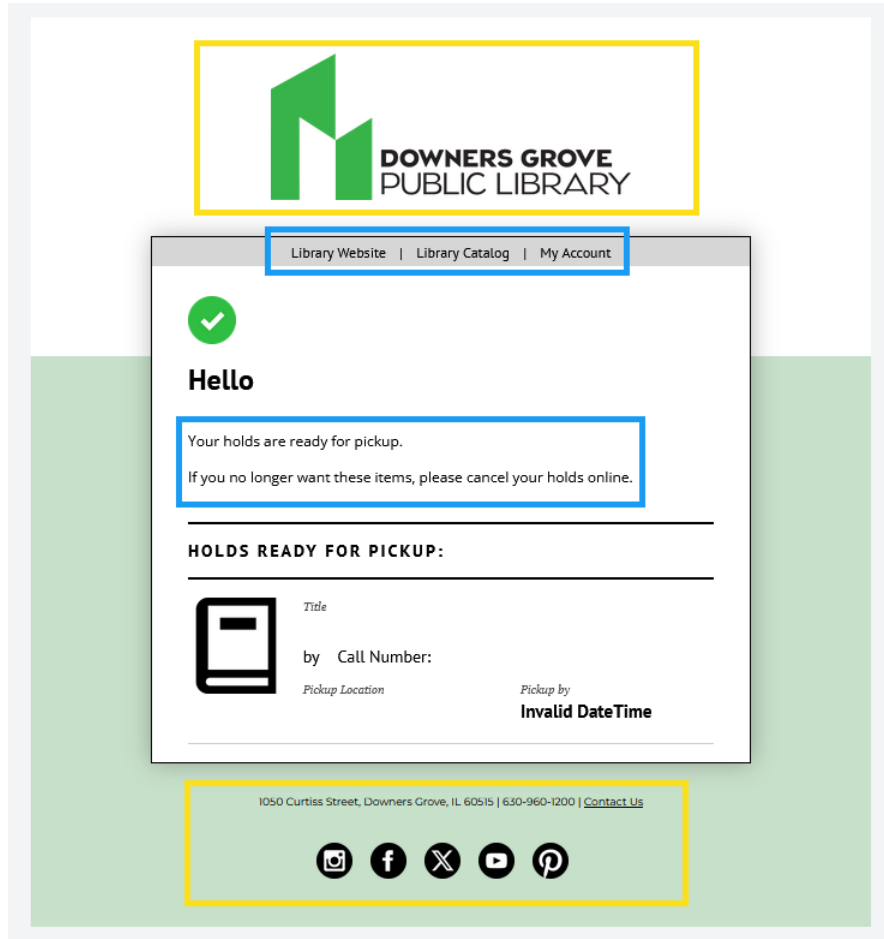
# MessageBee – Patron Says they Aren't Receiving Notices

- Ask the patron if they've blocked any phone #s or email addresses and verify.
  - You can find voice and SMS phone numbers at:  
[swanlibraries.net/documentation/94308](https://swanlibraries.net/documentation/94308)
- The patron may be receiving notices via a method they don't normally use or often check. Offer to switch them to another delivery method. For instance from SMS to email.

# MessageBee - Templates

- Modifiable templates are available for email and SMS and for each notice type. For instance libraries not only have an email template for their 1<sup>st</sup> overdue notices, but another email template for 2<sup>nd</sup> overdue notices.
- Are accessible via your library's full access login
- Libraries can modify the subject, menus, notice text and add banners to both the header and footer in email templates
- For other changes libraries can contact Unique directly
  - Example: Updating the footer

# MessageBee - Templates



- Blue – Library's can update on their own
- Yellow – Ask Unique for assistance

# MessageBee - Templates



Library Website | Library Catalog | My Account

**!**


**Hello**

The following items are overdue.

---

**ITEMS OVERDUE:**

---

Title	by	Call Number:	Item Barcode:	Due Date	Checkout Location
				Invalid DateTime	

---

**? Have a question?**  
Get in touch

---

**NEW! Download the Library App**

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One South Sixth Ave. St. Charles, IL 60174 | 630-584-0076 | [Contact Us](#)

St. Charles Public Library District is a member of SWAN Library Services, a resource sharing consortium.



Library Website | Library Catalog | My Account

**DOWNLOAD THE NEW SWAN LIBRARIES + APP**

Manage Your Account  
Request Titles  
Save Your Card

**✓**

**Hello**


Your holds are ready for pickup.

If you no longer want these items, please cancel your holds online.

---

**HOLDS READY FOR PICKUP:**

---

Title	by	Call Number:	Pickup Location	Pickup by
				Invalid DateTime

---

**? Have a question?**  
Get in touch

616 Hiawatha Drive, Carol Stream IL 60188 | 630-653-0755 | [Contact Us](#)

Carol Stream Public Library is a member of SWAN Library Services, a resource sharing consortium.

# MessageBee - Templates

- For SMS libraries can update the notice text

## Transactional SMS Templates

---

From:

---

Reminder: Your holds are ready for pickup. Check your online account for details.

---

# SMS – Messaging

- Library staff can communicate with patrons from the MessageBee portal via SMS
- An icon towards the top of the screen will indicate unread messages





# SMS – Messaging

The screenshot displays an SMS messaging application interface. At the top is a dark blue header bar containing navigation links: "Reports", "Transactional", and "SMS". To the right of these links are icons for a share function, a help/question mark, and a notification bell with a red "1" badge. A search bar and a user profile icon are also present in the header.

Below the header, the main content area is titled "2 Way SMS". It is divided into two panels. The left panel shows a list of four messages, each with a timestamp and a delete icon (trash can):

- 8/6/2025, 9:59:23 AM  
I barely made it because my computer has no battery and I couldn't locate the charger
- 8/1/2023, 2:57:54 PM  
Are my books late
- 8/1/2023, 2:24:49 PM  
Thank you
- 7/31/2023, 2:40:19 PM  
Okay

The right panel shows a detailed view of the selected message "Okay". It includes a "View recent notification" button at the top right. At the bottom of the message view, there is a blue "Okay" button and the timestamp "7/31/2023, 2:40:19 PM". Below this is a large text input field and a blue "Send" button.

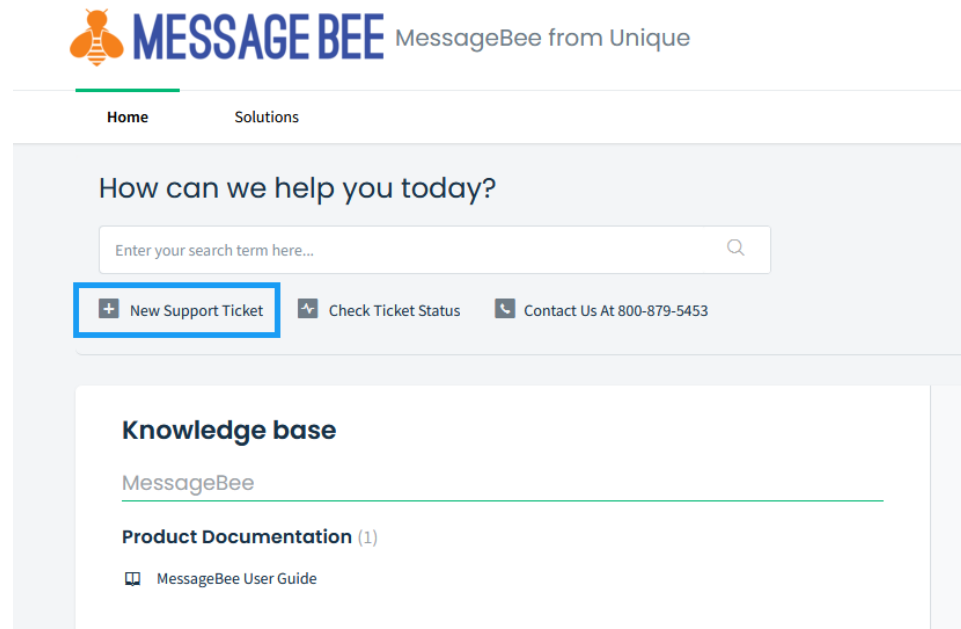
At the bottom left of the interface, there is a "Start a new conversation" dropdown menu and two buttons labeled "Prev" and "Next".

# MessageBee - Contact Unique

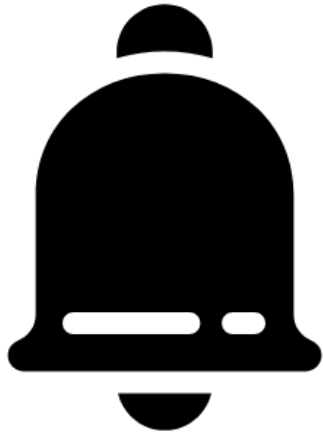
- Click on the icon with a question mark in the circle.



- This will take you to Unique's help pages. From there you can open a new support ticket.



# Open a ticket with SWAN





## Notifications

Request assistance with the MessageBee notification platform including reports and statistics, templates, or following up on failed notices.

Ask a general question

Request a change to notifications

 Contact Unique

 Book a MessageBee consultation

 Ask a question on the forums

# Questions?

