SWAN Notifications from the Ground Up

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Consultant, Information Technology and Systems Support

Agenda

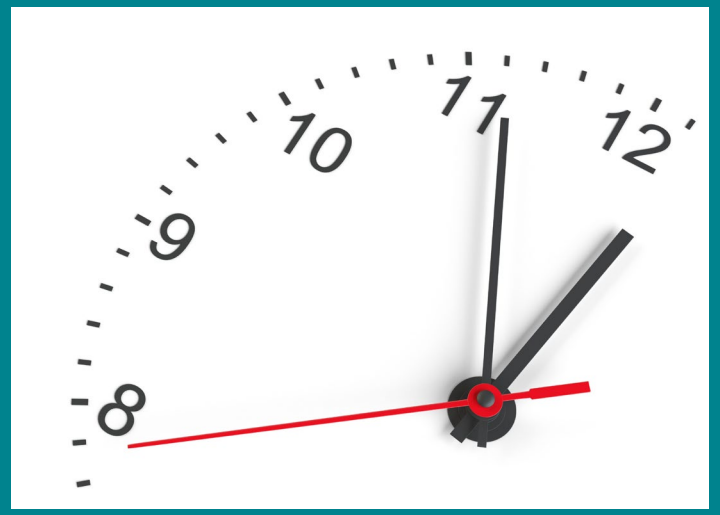
- Notices, what notices?
- When do they go out?
- Delivery methods - how it’s determined?
- Languages
- MessageBee?
  - Reporting
  - Failures
  - Searching/Verification of Notice Sent
  - Templates
  - SMS Messaging
- How to Contact
- Q&A

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
  - 1st Overdue sent after 7 days
  - 2nd 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?

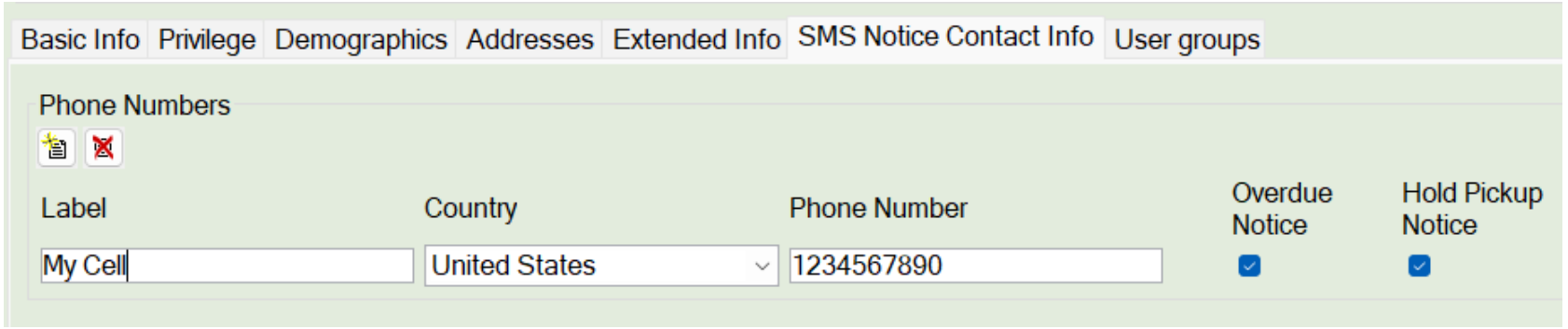
- Bills (Email and *Print)
- Holds (SMS, Email and Voice)
- Courtesy (SMS and Email)
- Overdue (SMS, Email and Voice)

**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.*

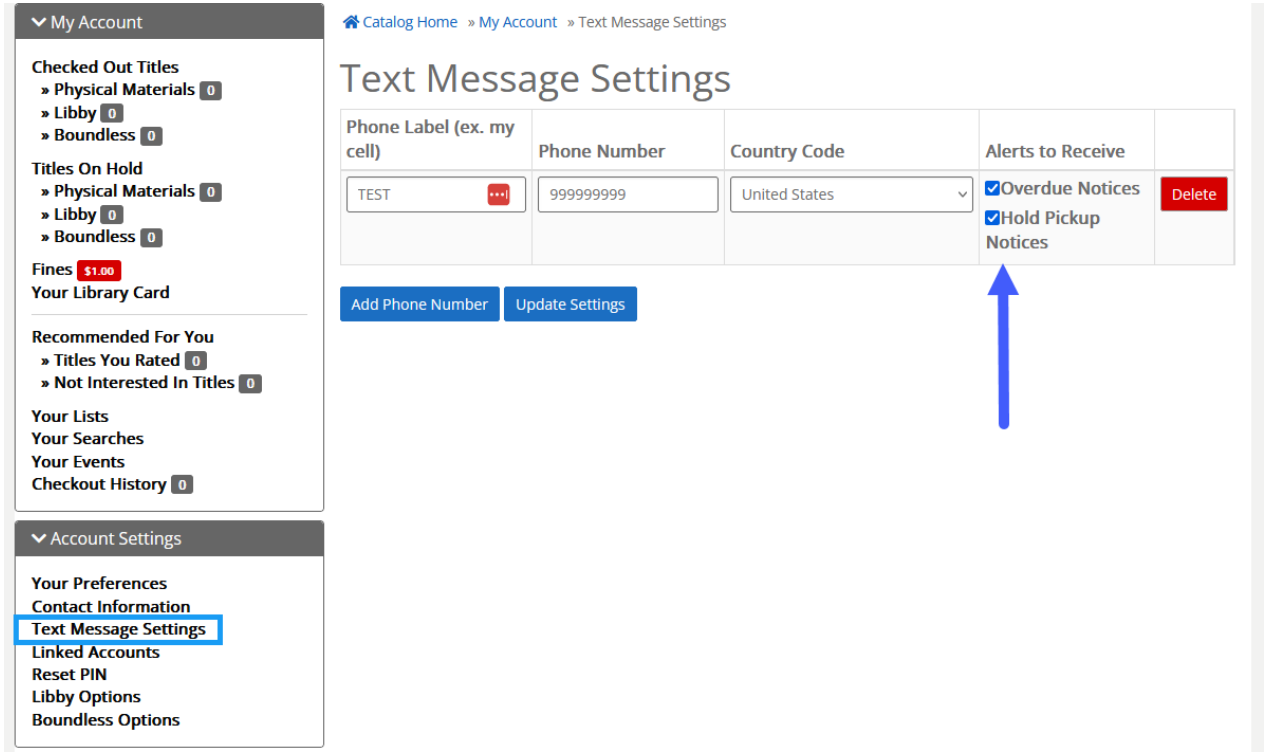
Languages

- 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

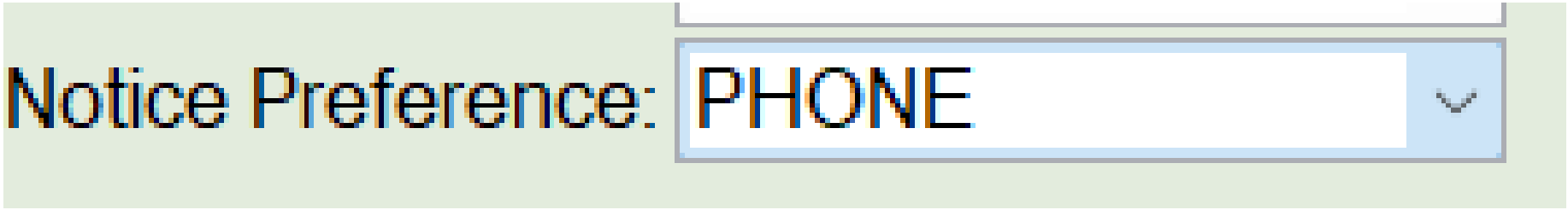


- There are 2 places SMS notices can be activated:
  - WorkFlows under the SMS Notice Contact Info tab
  - Aspen > Account Settings > Text Message Settings



Delivery Method – Phone

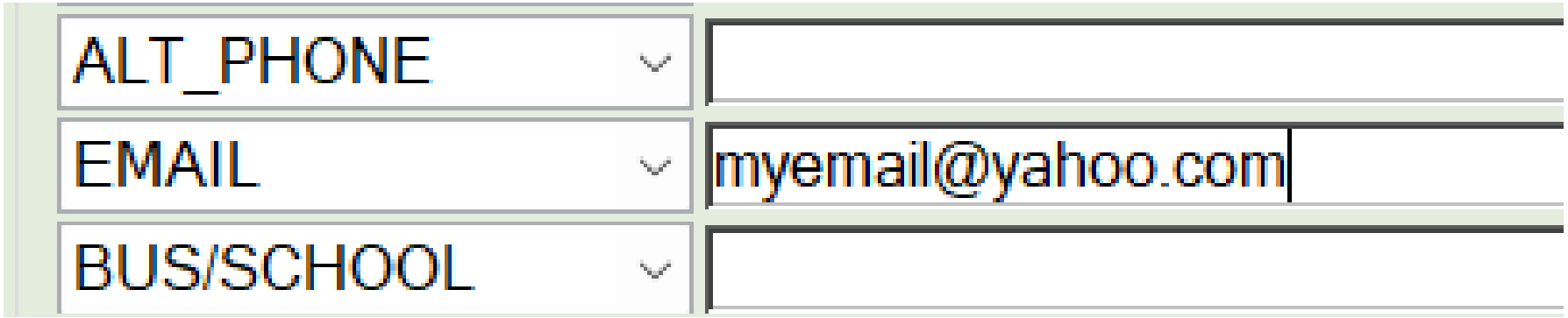
- Found under the Demographics tab in WorkFlows



- ***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.

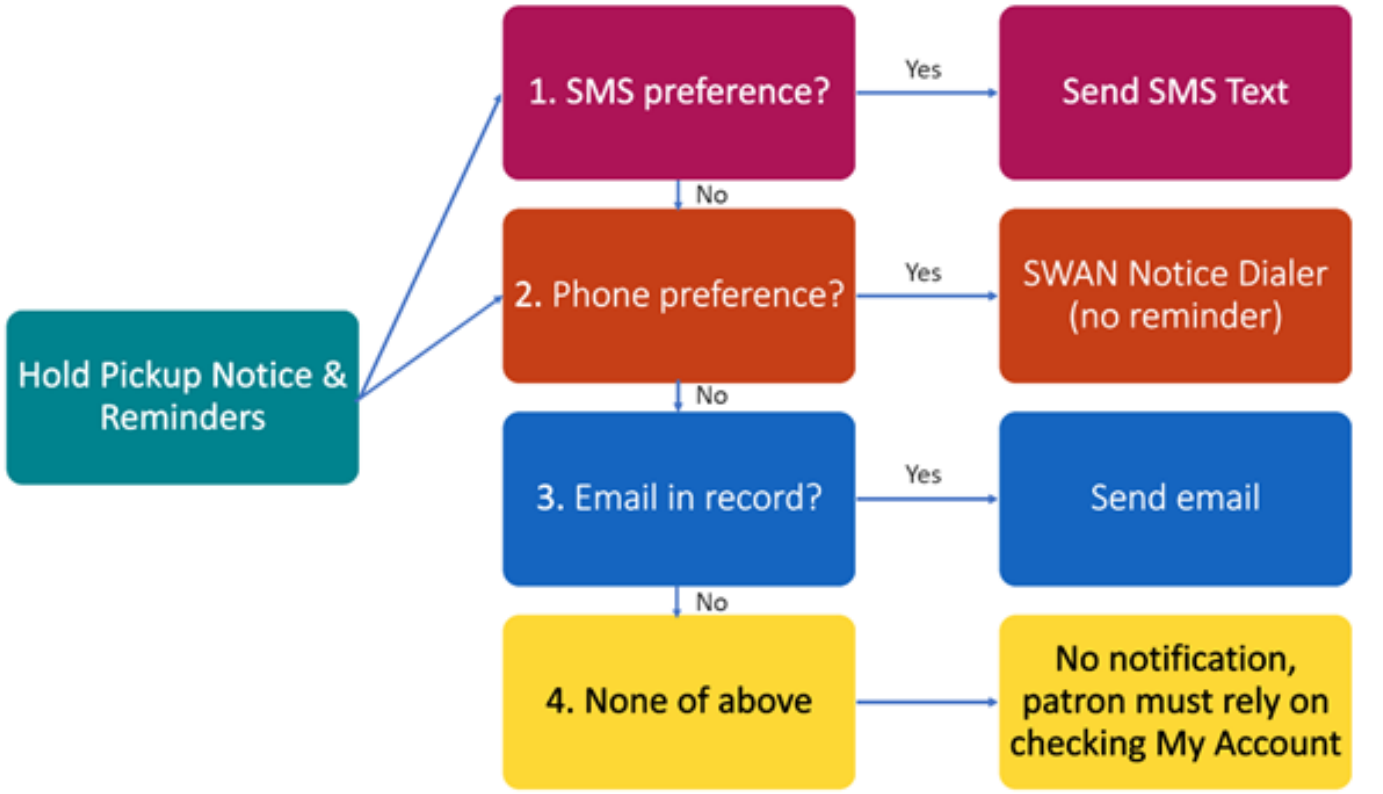
- Must also have a valid phone # in the PHONE field under the address tab

Delivery Method - Email



*Found under the Address tab

Delivery Method - Holds

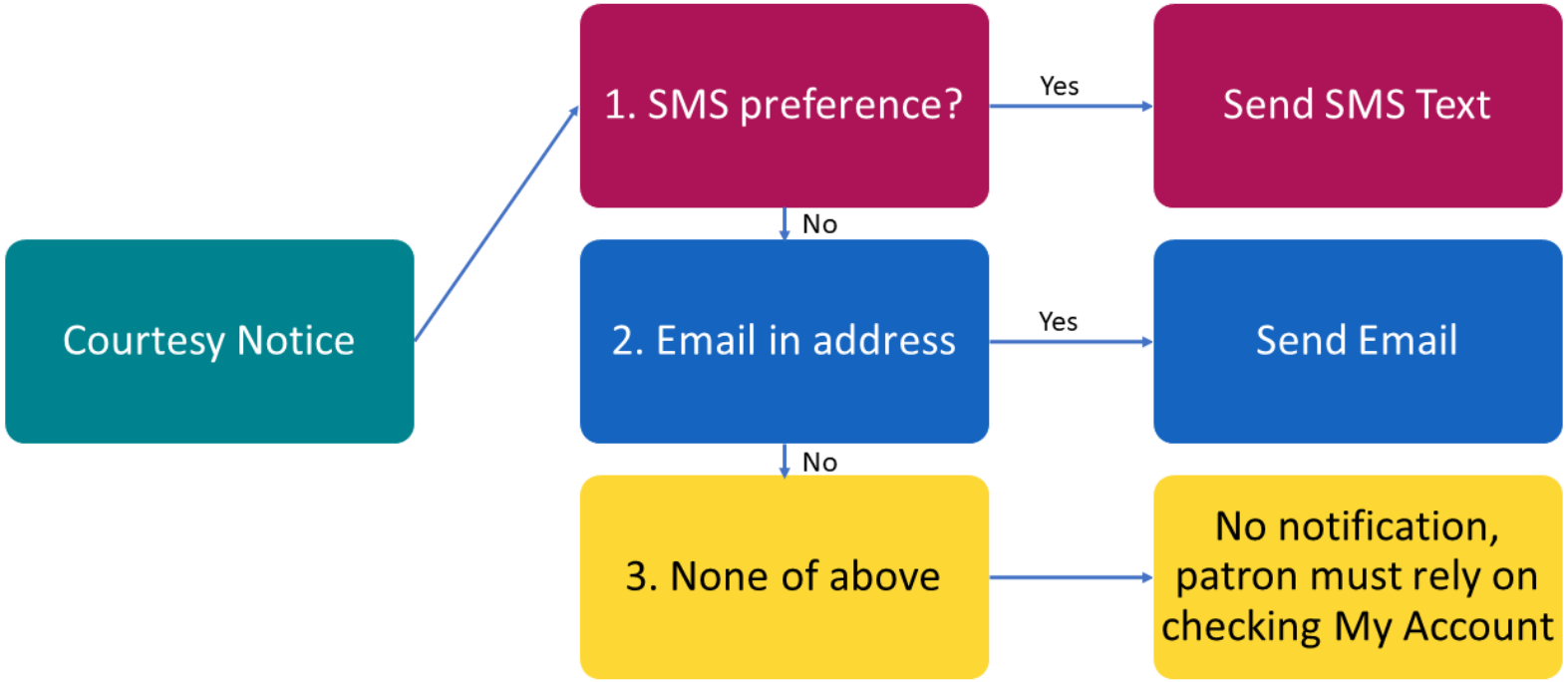


https://support.swanlibraries.net/documentation/64674

Delivery Method – Holds Cancellation

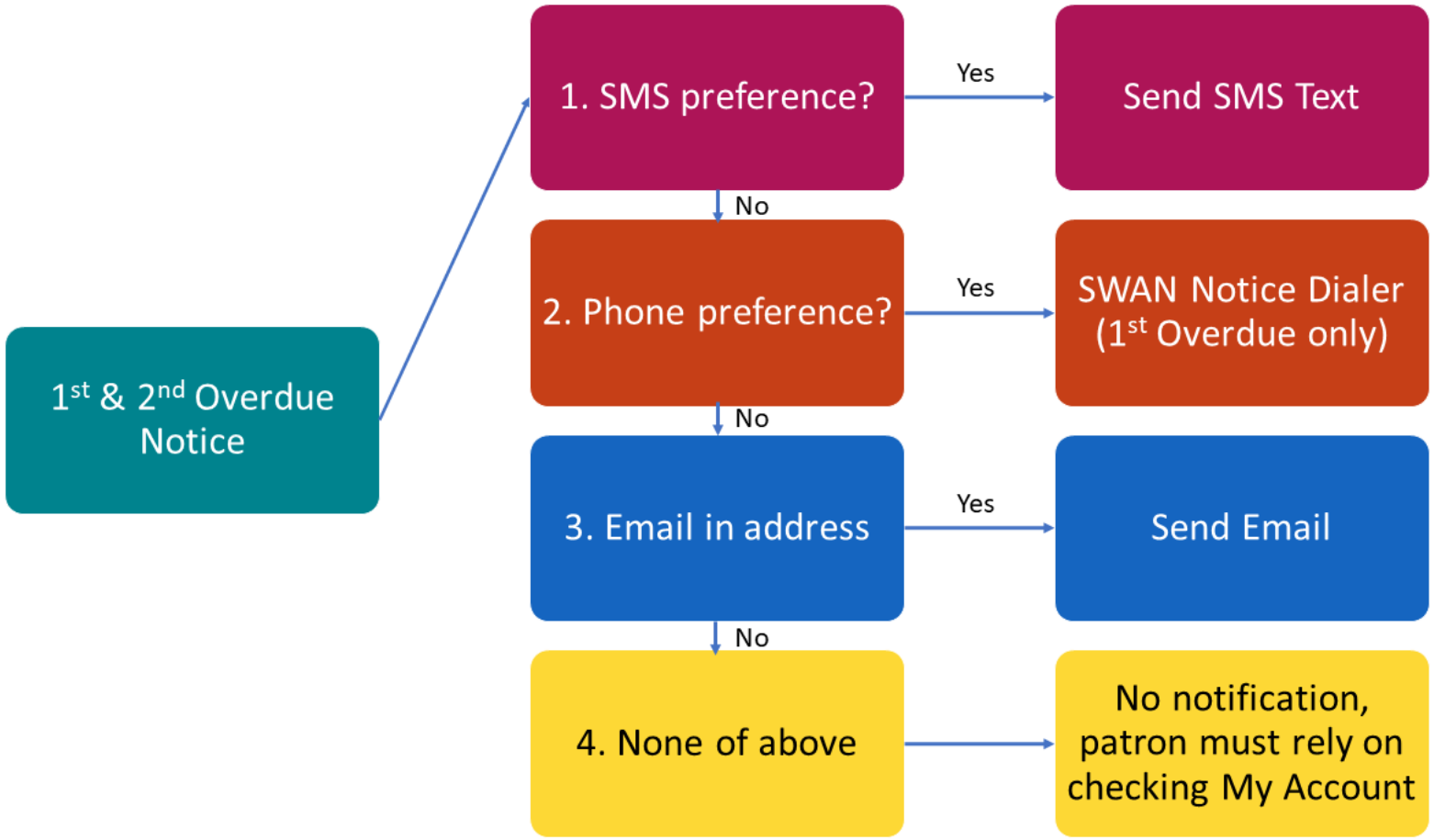
https://support.swanlibraries.net/documentation/64674

Delivery Method - Courtesy



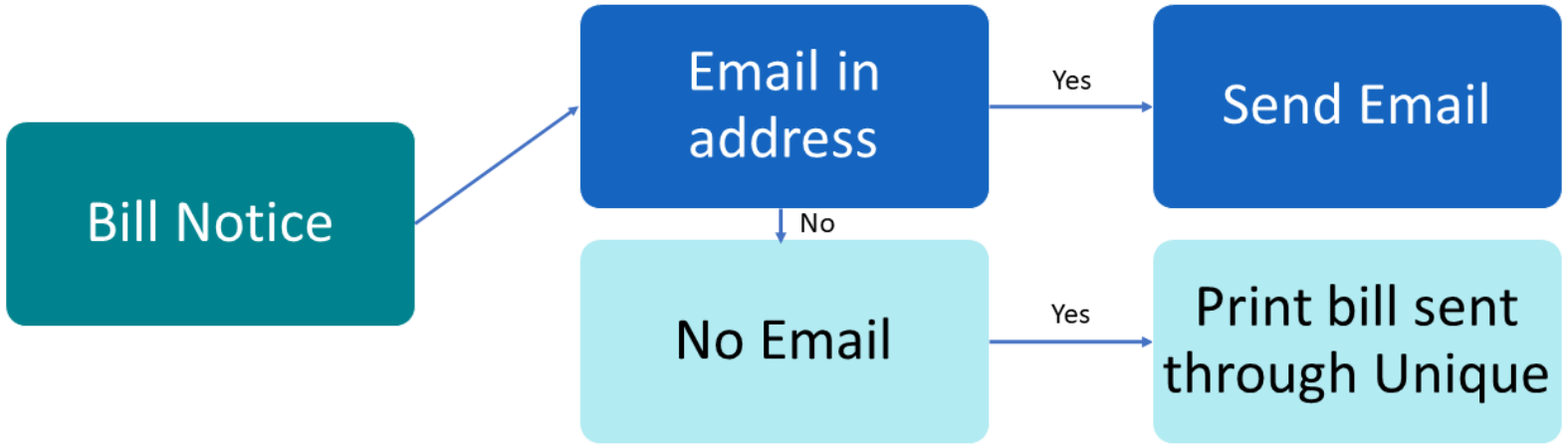
https://support.swanlibraries.net/documentation/64674

Delivery Method - Overdues



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

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 t	2023-04-18T16:19:00.161Z	SWS - 1st Overdue
3		null		550 5.2.1 <>... Addressee unknown, relay=[]	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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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

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A: Yes, they would receive a print notice.

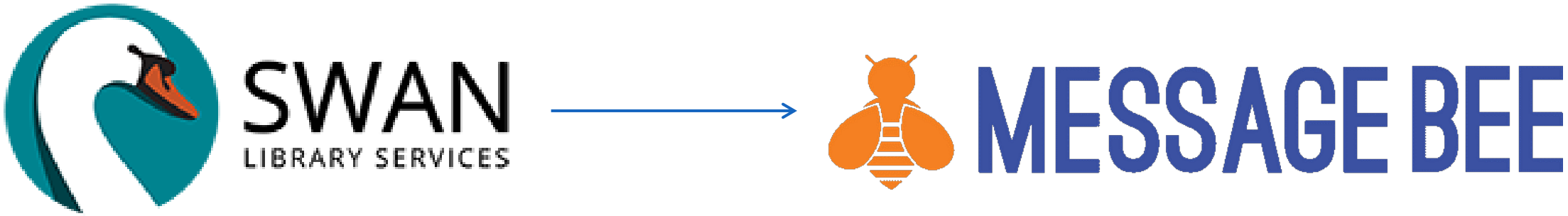
Notice Preference – Quiz

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?

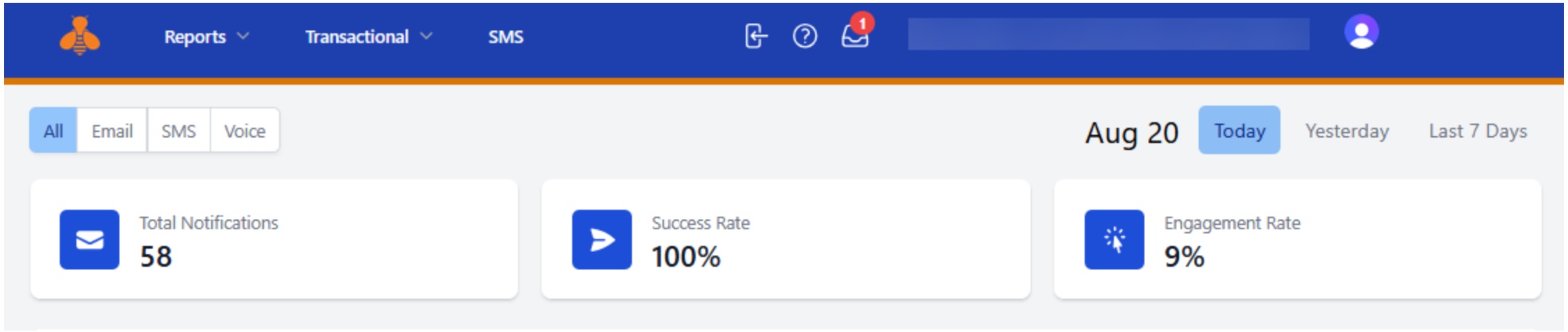
A: They would need to check in their online account either through Aspen or the SWAN + Library app.


SWAN
LIBRARY SERVICES
MESSAGE BEE

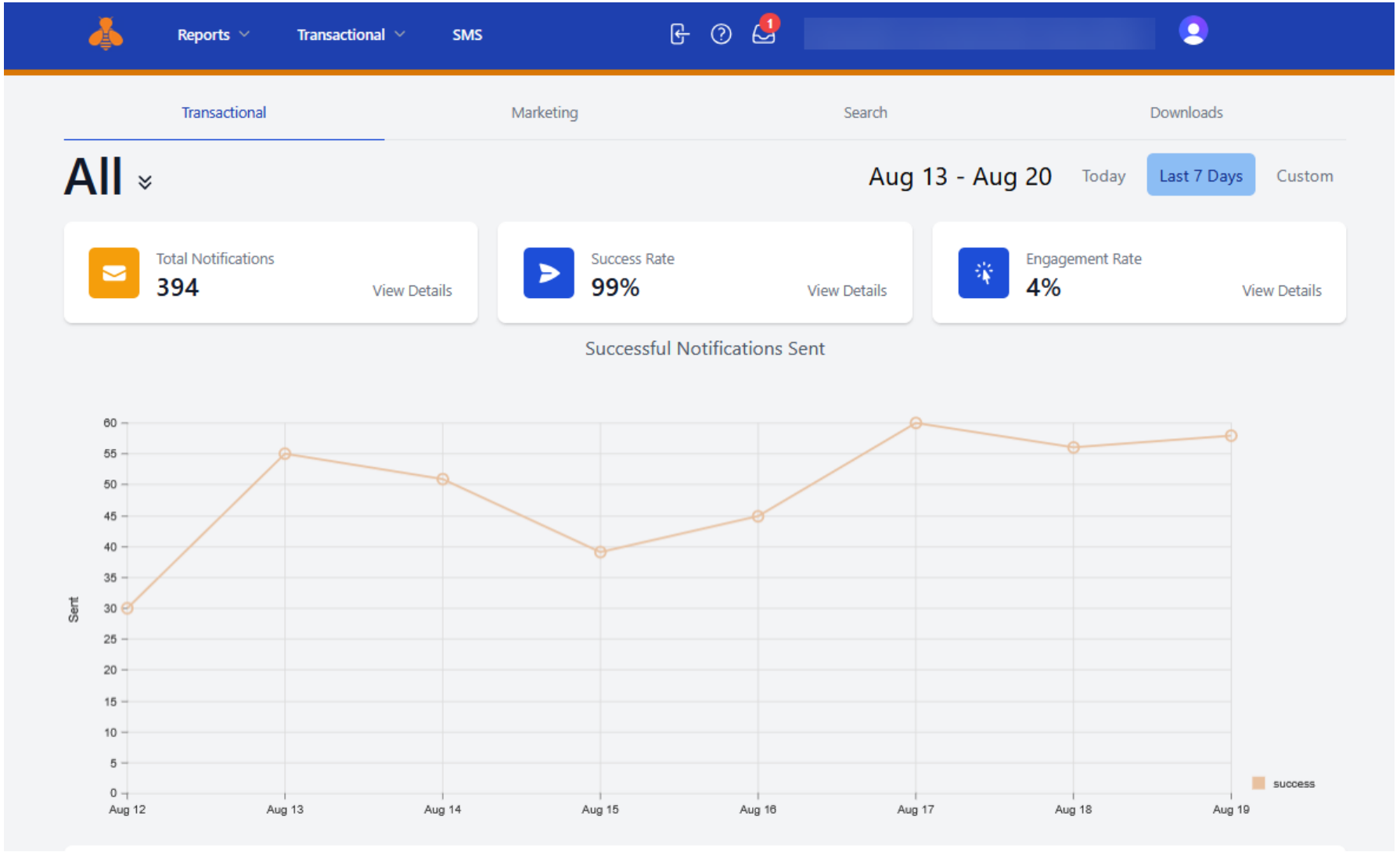
What is MessageBee?

- 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

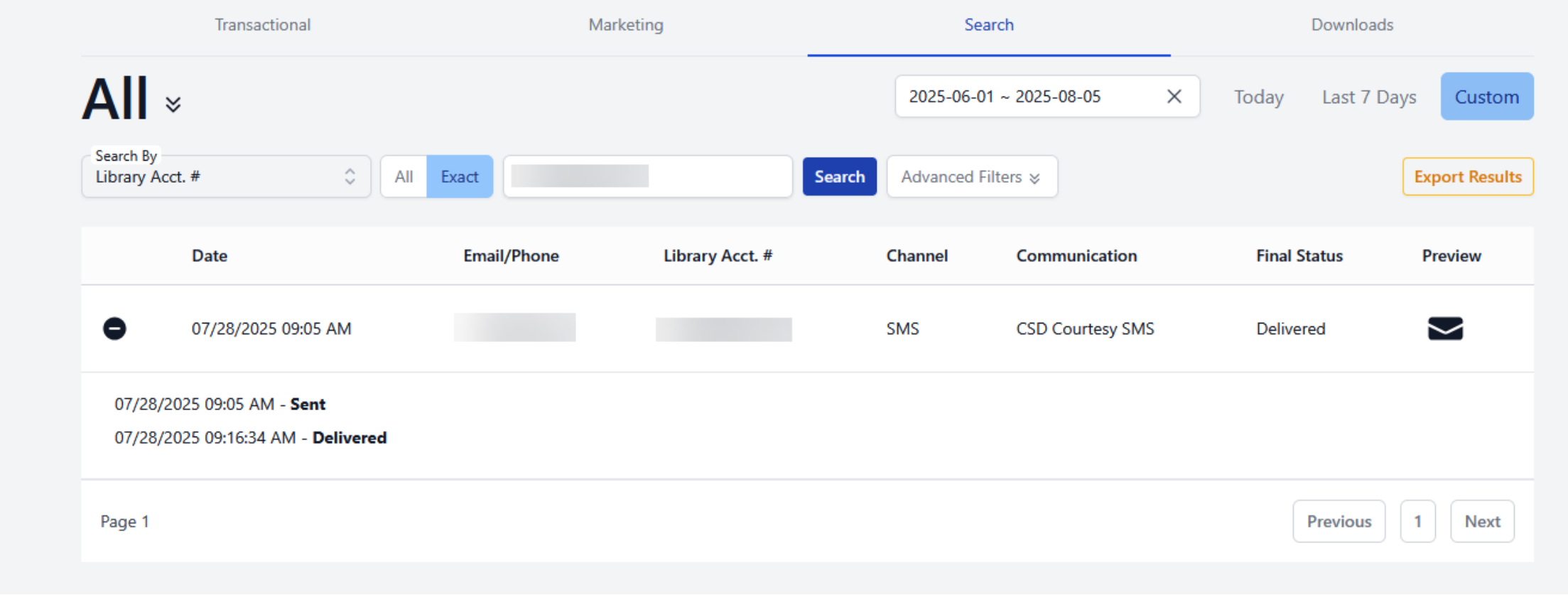
Date	Sent	Delivered	Failed	OptOut	Opens	Clicks
BVD - 1st Overdue						
08/12/2025	2	2	0	0	2	0
08/13/2025	2	2	0	0	2	0
08/14/2025	1	0	1	0	0	0
08/15/2025	6	5	1	0	1	0
08/16/2025	2	2	0	0	0	0
08/18/2025	3	3	0	0	3	0
08/19/2025	1	1	0	0	0	0
Total	**17**	**15**	**2**	**0**	**8**	**0**
BVD - 2nd Overdue	**10**	**10**	**0**	**0**	**5**	**0**
BVD - Bill	**6**	**6**	**0**	**0**	**4**	**1**
BVD - Courtesy						
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

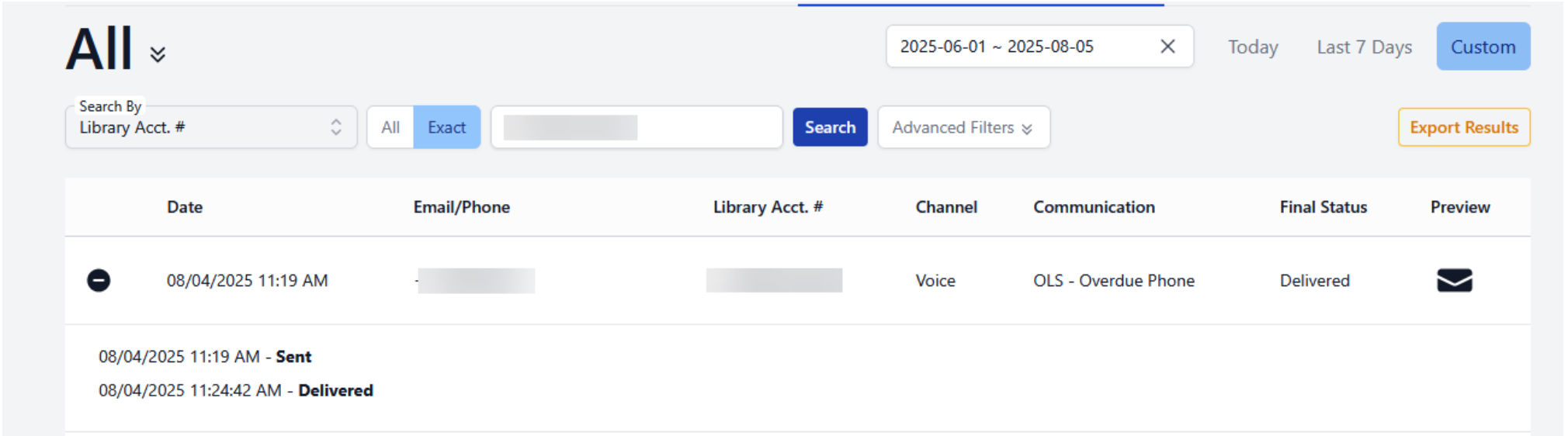
Date	Email/Phone	Library Acct. #	Communication	Reason
08/18/2025 02:34 pm			PFS - Hold Pickup	Opt out
08/18/2025 09:04 am			PFS - Courtesy SMS	Carrier Rejected Message
08/17/2025 05:09 pm			PFS - Hold Pickup Reminder	550 5.5.1 Recipient rejected - O...
08/16/2025 05:24 pm			PFS - Hold Pickup Reminder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

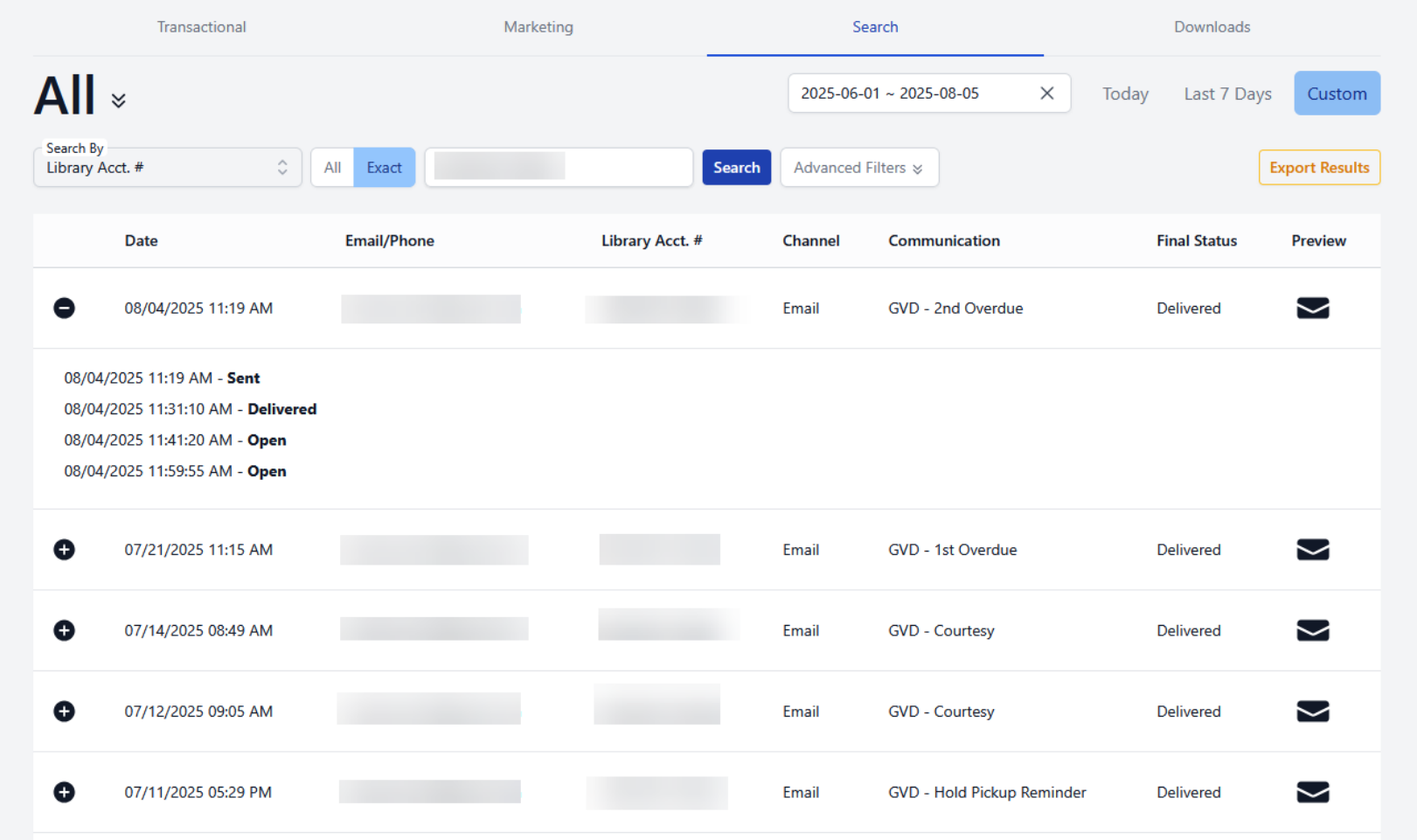
MessageBee - Searching



MessageBee - Searching

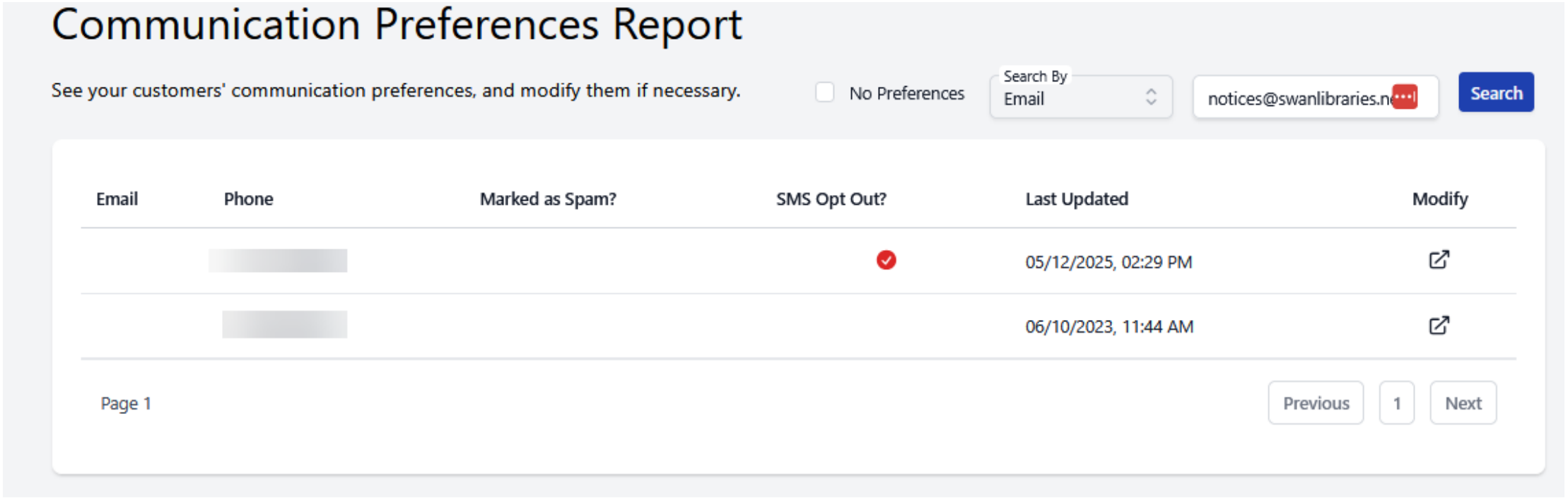


MessageBee - Searching



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



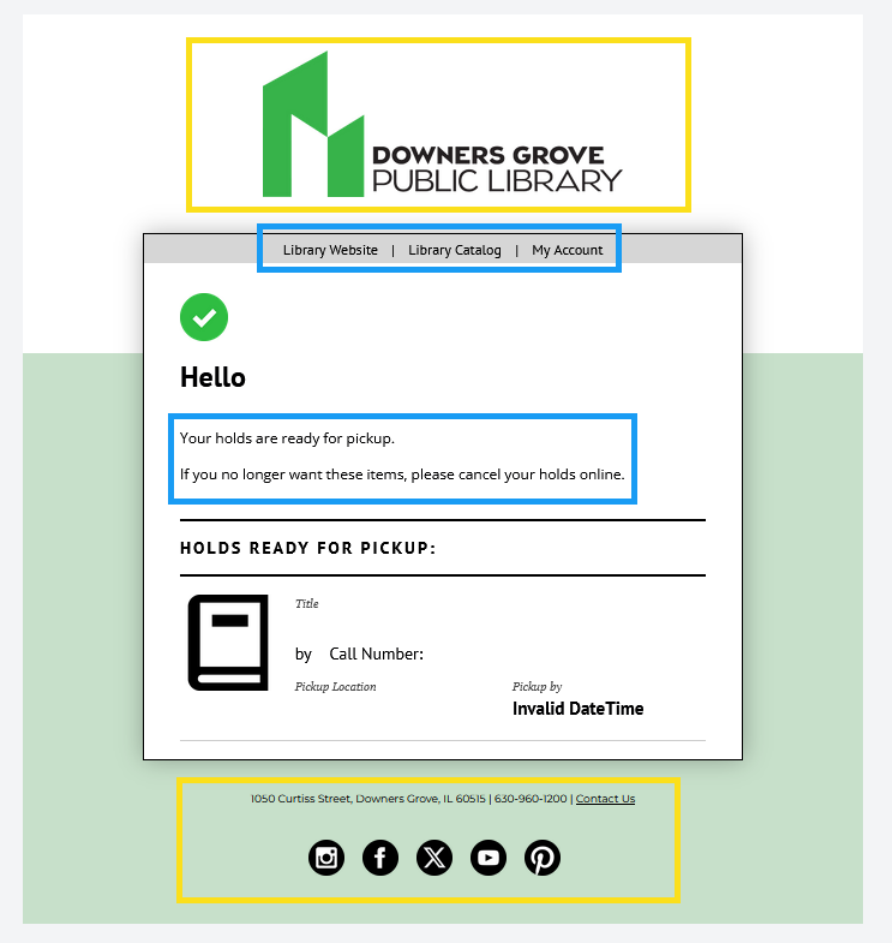
MessageBee – Patron Says they Aren't Receiving Notices

- 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
- 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

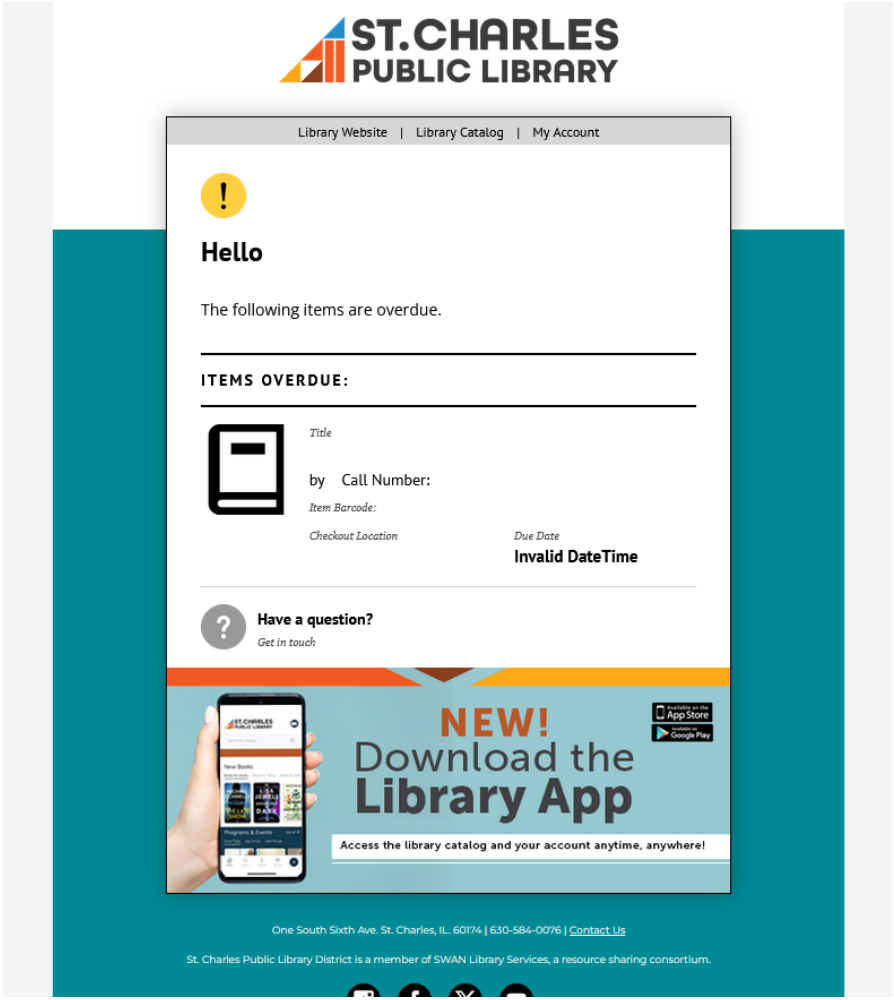
- Modifiable templates are available for email and SMS and for each notice type. For instance libraries not only have an email template for their 1st overdue notices, but another email template for 2nd overdue notices.
- Are accessible via your library's full access login
- Libraries can modify the subject, 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

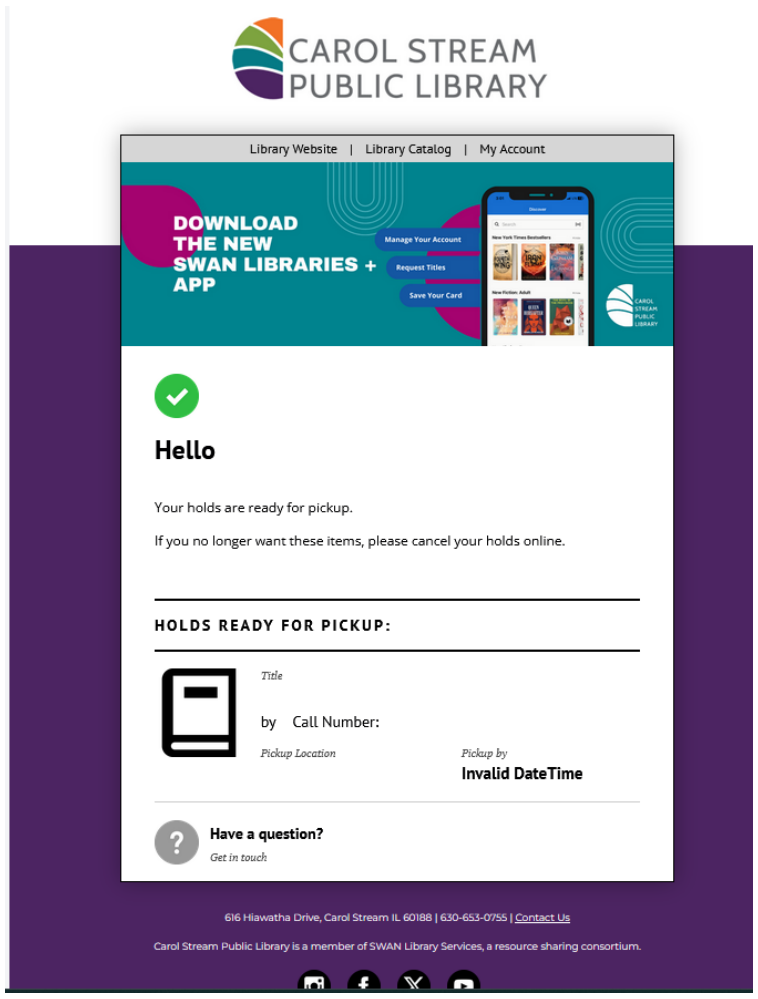
MessageBee - Templates



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

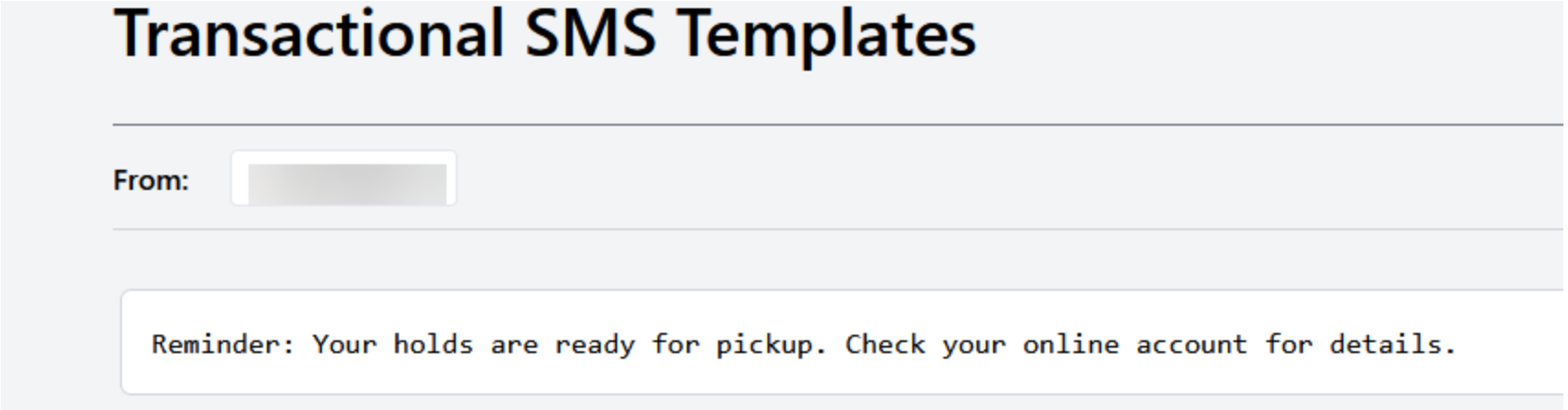
MessageBee - Templates





MessageBee - Templates

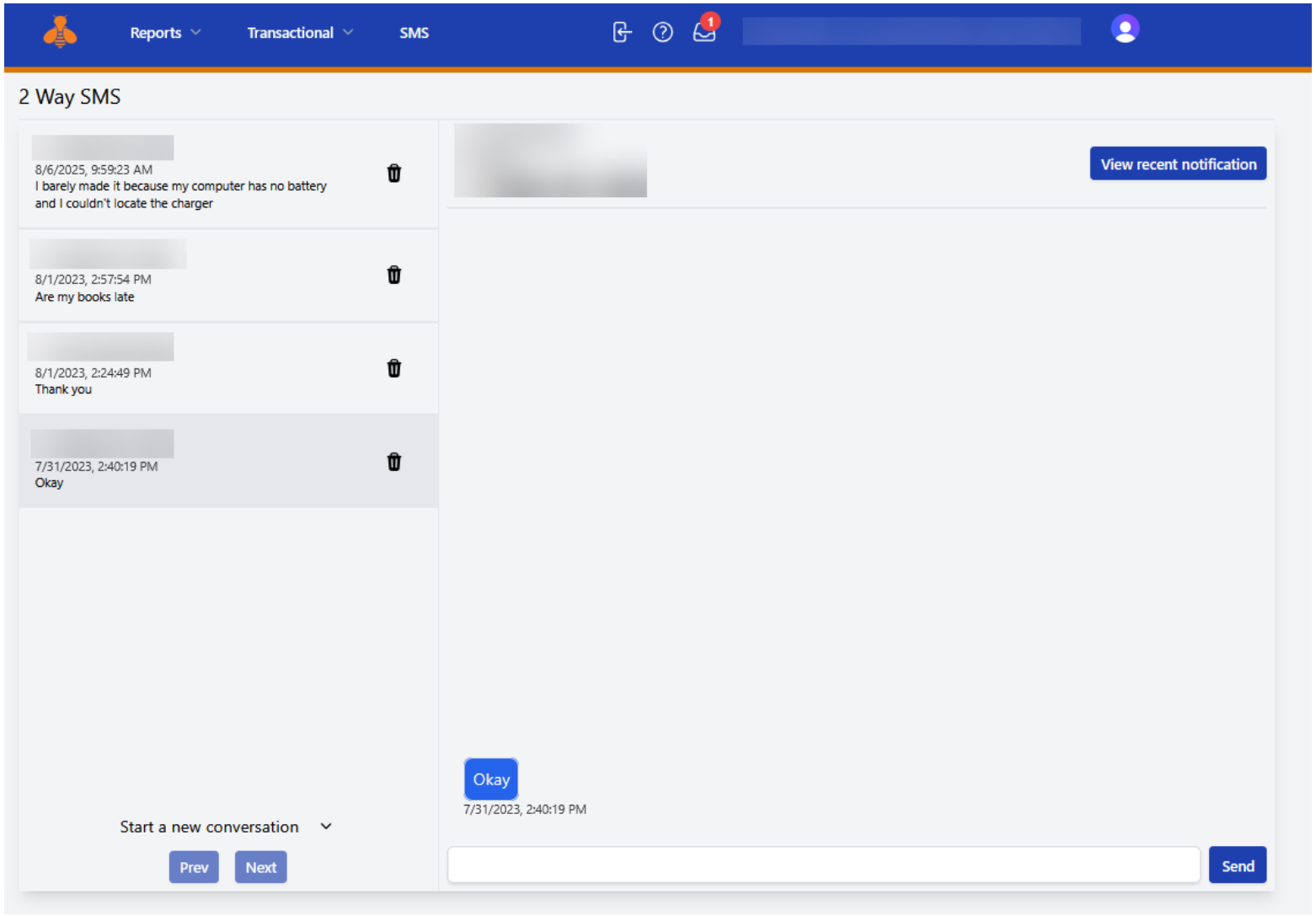
- For SMS libraries can update the notice text



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

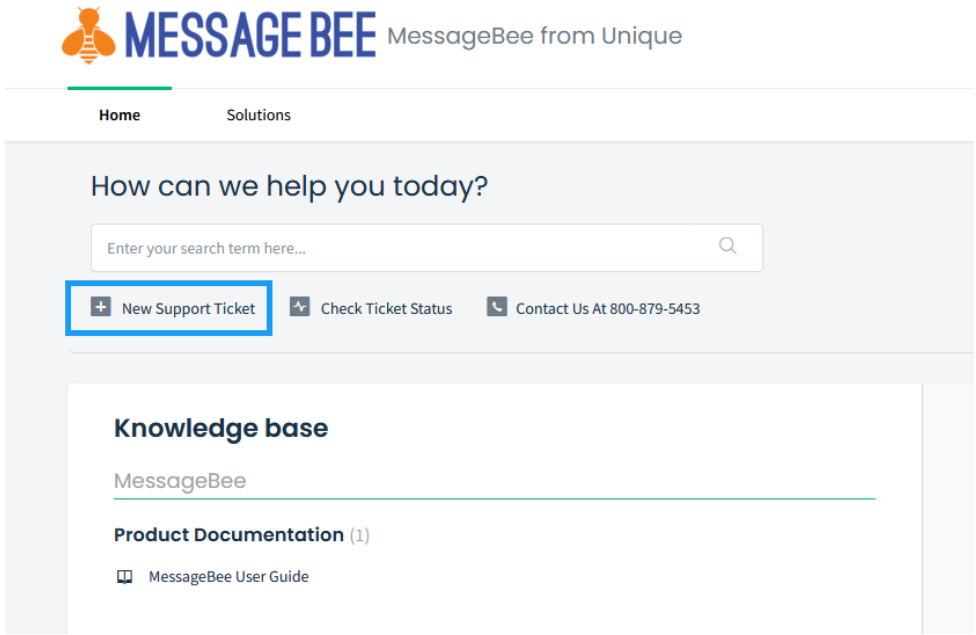
SMS – Messaging



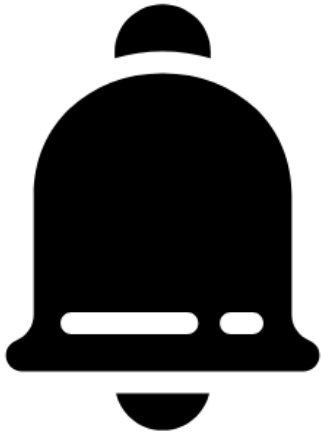
MessageBee - Contact Unique

- 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?