

Implementing MessageBee for Library Email Notices



From "Eeeek!" to "Ahhh"
Presented by: Wes Osborn & Mike Fields

Outline

The problem with traditional notices

Solutions

Why CLC selected MessageBee

Implementing MessageBee

Upcoming features

The
problem(s)
with ILS
notices

PLAY UP

OR

ELSE!!!

They look terrible

Delaware County Library Orange Drive-Up Window
7171 Gooding Boulevard
DELAWARE, OH 43015

To:

1308717378
DVD BET
1308717378
8/8/2020

The following items are now available for pick up at the Orange Branch's drive-up window. The current hours of drive-up operation are: Mon, Wed, Fri, and Sat 9-5, and Tue and Thurs 11-7.

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Call No.: DVD BET
Barcode: 1308717378
Held Until: 8/8/2020

If you do not wish to receive this information via email, please reply to this message or contact the library.

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To unsubscribe from library account hold pick up notices, reminder notices and other account related c

Not dynamic

Wording managed by ILS Admin

Making significant changes relies on delicate customizations

Marketing team can't pre-program upcoming library highlights





Poor delivery

Just because you *send* an email doesn't mean it will arrive.

Not by a long shot... The ecosystem around email is a dank miasma of half-implemented, incompletely supported anti-spam hacks and workarounds.

Which means the odds of that random email your code just sent getting to its specific destination is .. spotty. At best.

--Jeff Atwood, co-founder of Stack Overflow and Discourse



Solutions

DIY

Poor delivery can be fixed
by routing through a 3rd
party

CLC used the Polaris API to
build our own email
replacement



Vega

Not just about discovery,
planning a new
CRM/Marketing platform

But...

Innovative is building
their own platform, not
relabeling another
product



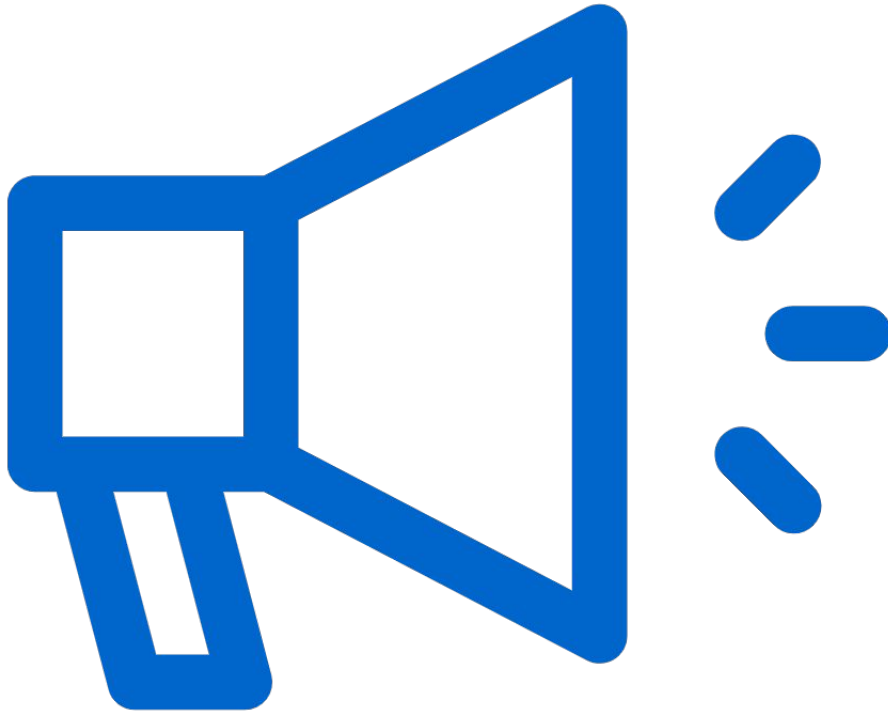
Vega may
deliver better
notices...
in the future





Patron Point

Patron Point



Patron Point

Start initially as a email marketing platform

Added transactional email support later

Newer company but includes several industry veterans and seems to be executing well



MESSAGE BEE

Why did CLC select MessageBee (company)

Unique Management is mindful of the Patron Experience

They were open to our feedback on improvements to the product

We were able to work directly with the technical team

Provided implementation support at the library level

Why did CLC select MessageBee (product)

Consortium Support:

Flexibility down to the branch level

Bounce handling: Uses the ILS API to automatically update the account

Proper implementation of DMARC email sending domain verification

Use of the ILS API (when possible)



Implementation

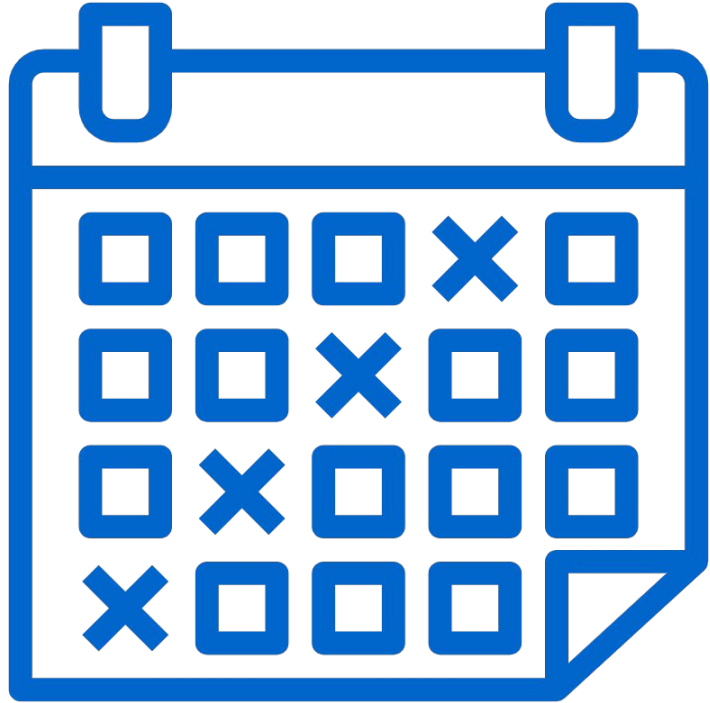
Implementation Outline

Perform sending domain verification

Set up templates in MessageBee

Set up export process

Set up update process



Give yourself time

Select domain and perform sending domain verification

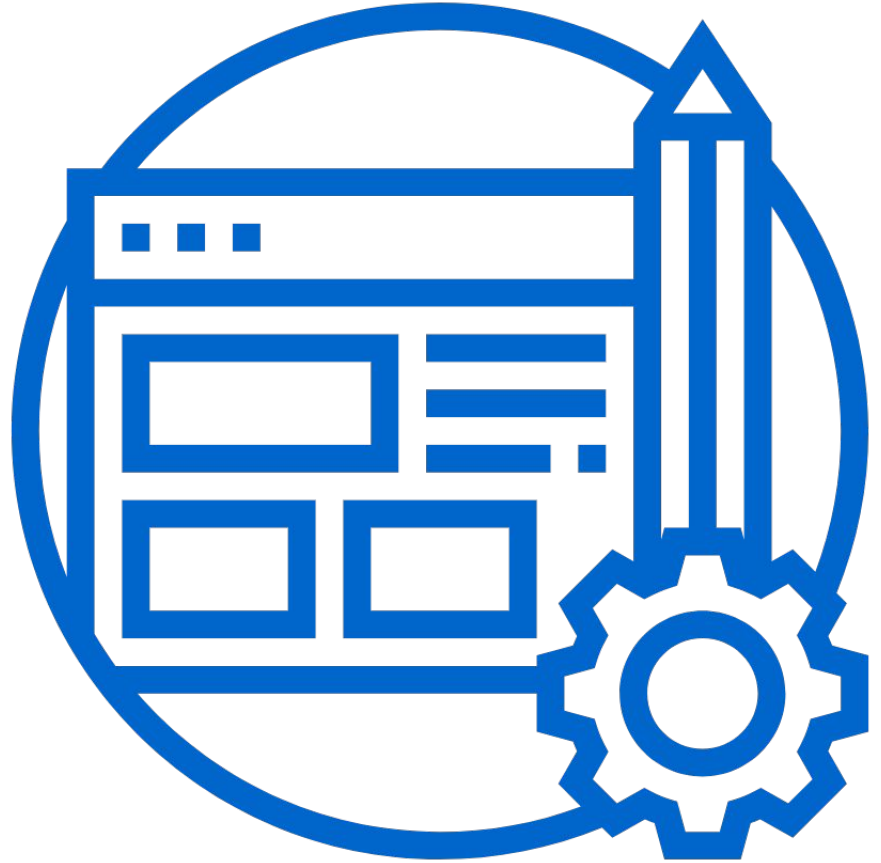
@librarydomain.org may NOT be the best

@notices.librarydomain.org can help keep your reputation score “good” for email sending from your main domain

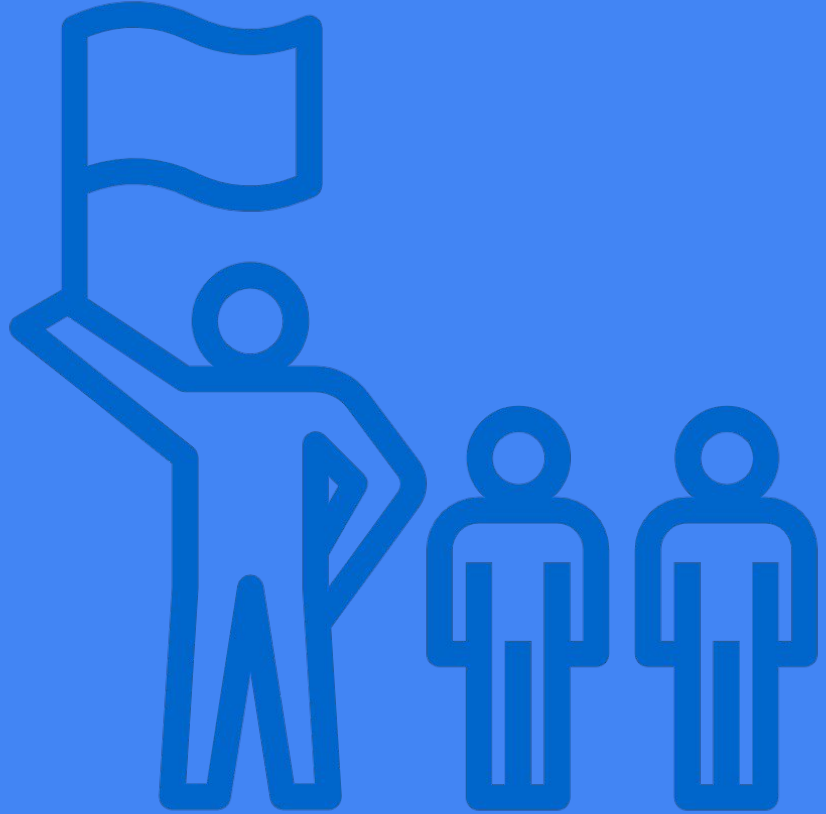
Warm up domain several weeks before using it full scale

Make sure you have access to add needed DNS records: Unique will provide the DNS entries that need added

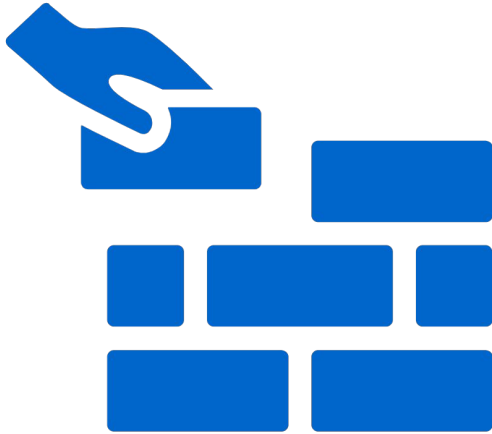
Setting up templates



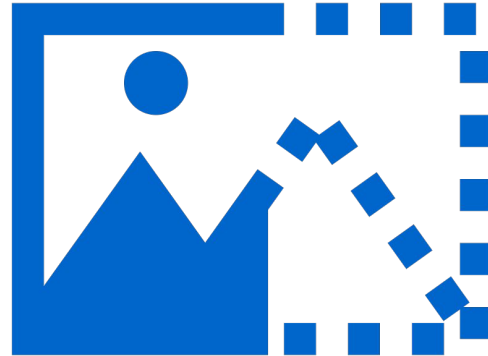
Who will lead
your process?
ILS Admin?
Marketing?
Circulation
Manager?



Notice by Notice?



Or Transparent Swap?



**Unique will
help guide
you**



Notice by Notice

Design “new” template including branding

Add in glyphs/icons, book jacket covers

Create new wording (shorter = better)

Add unsubscribe instructions

Set up marketing campaigns you’ll add*

Deploy Canceled Holds, Overdue, Reminder, and
finish with Holds Pickup

**Don’t add too much marketing or it could be
flagged a SPAM or “bulk” mail*

Transparent method

Copy the look and feel of current Polaris notices

Add unsubscribe instructions

Move notices over to MessageBee

Deploy Canceled Holds, Overdue, Reminder, and **finish with Holds Pickup**

Useful for consortia where aligning resources to update ALL members is difficult

Do a final test with: <https://www.mail-tester.com/>

Test the Spammyness of your Emails

First, send your email to:

test-ggi5imd7g@srv1.mail-tester.com



Then check your score

Polaris Requirements for MessageBee Integration

Polaris API (PAPI)

PAPI Staff Account

Ability to add software and SQL job to Polaris database server

MessageBee Export Process

1. Notice job runs export script

2. Checksum is generated for the export file and saved

3. All of the notices (accounts) in the export are updated via PAPI

4. Export file is generated using a SQL script

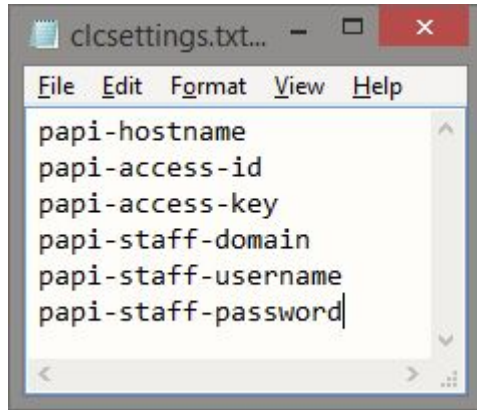
5. The files are uploaded to Unique via SFTP, checksum first

Job Folder Structure

```
C:.\
├── clc_msgb
│   ├── clcsettings.txt
│   ├── exportnotice.log
│   ├── exportnotice_extra.log
│   └── export_notice_data.psi
├── dll
│   ├── clc-rest-client.dll
│   ├── Newtonsoft.Json.dll
│   └── polaris-api-csharp.dll
├── sql
│   └── export_polaris_notices.sql
├── temp
└── ums_sftp
    └── SftpTransferCommandLine.exe
```

clcsettings.txt

One setting per line, replace placeholder text with value



```
File Edit Format View Help
papi-hostname
papi-access-id
papi-access-key
papi-staff-domain
papi-staff-username
papi-staff-password|
```

Database Job Configuration

Job Properties - Notices Processing

Script Help

Job step list:

St...	Name	Type	On Success	On Failure
1	Process Fine Notices	Transact-...	Go to the...	Go to step:...
2	Populate Fine Notices for Reporting	Transact-...	Go to the...	Go to step:...
3	Process Overdue and Bill notices	Transact-...	Go to the...	Go to step:...
4	Populate Overdue and Bill Notices for Repor...	Transact-...	Go to the...	Go to step:...
5	Process 2nd Hold Notices	Transact-...	Go to the...	Go to the n...
6	Process Claim Notices	Transact-...	Go to the...	Go to step:...
7	Populate Claim Notices for Reporting	Transact-...	Go to the...	Go to step:...
8	Process Almost Overdue, Expiration and Ina...	Transact-...	Go to the...	Go to the n...
9	Reindex Results tables for Notices Processin...	Transact-...	Go to the...	Go to the n...
10	Reindex specific PolarisTransactions tables f...	Transact-...	Go to the...	Go to the n...
11	Populate Hold Notice email and TXT	Transact-...	Go to the...	Go to the n...
12	CLC Custom - Send MessageBee Notices	PowerShell	Go to the...	Quit the job...
13	CLC Custom - Check queue for any overdue ...	Transact-...	Go to the...	Quit the job...
14	Execute Polaris Email Manager to send out e...	Transact-...	Go to the...	Go to the n...
15	Execute ExportNotices to export notices data	Transact-...	Quit the j...	Quit the job...

Job Properties - Hold Notice Processing

Script Help

Job step list:

St...	Name	Type	On Success	On Failure
1	Populate Hold Notice email and TXT	Transact-...	Go to the...	Quit the job...
2	CLC Custom - Send MessageBee Notices	PowerShell	Go to the...	Quit the job...
3	Execute Polaris Email Manager to send out e...	Transact-...	Quit the j...	Quit the job...

Step Properties - CLC Custom - Send MessageBee Notices

Script Help

Step name:
CLC Custom - Send MessageBee Notices

Type:
PowerShell

Run as:
SQL Server Agent Service Account

Command:
C:\ProgramData\clc_msgb\export_notice_data.ps1 -doupload -doupdate

Remember what we started with?

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Hello Wes Osborn

Items automatically renewed

We have automatically renewed the following items and they are now due back on the date indicated below. Items not eligible for renewal at this time have retained their original due date.

ITEM(S) RENEWED:

Title

**The coaching habit :
say less, ask more and
change the way you
lead forever**

Date Due

Monday, October 4th

The Coaching
Habit Say
Less, Ask More
& Change the



Come along, little ones!

Give your child a head start by reading 1000 books with your preschooler before kindergarten.

It's easier than you think!

[Click here to learn more](#)

Fairfield County District Library • 219 N. Broad Street, Lancaster, OH 43130

www.fcdlibrary.org • (740) 653-2745



To unsubscribe from library account hold pick up [notices](#), reminder [notices](#) and other account related correspondence, use this link: <https://notices.clcoho.org/email/unsubscribe>

Finished Product, Ahhh!

Bounce Handling

- Offending email address removed
 - Includes accounts that weren't sent a notice
- If no alternate email, delivery option is changed
 - Phone, if present, or mail
- Patron account is added to a patron record set
 - Different record sets for bounce and spam
- A note is added to the patron account
 - Date
 - Email address
 - Event type

Future MessageBee Features for CLC

Support for multiple languages

MessageBee/OPLIN for SMS

Support for fully hosted clients,
pending Innovative PAPI
improvements





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[Register for Q&A September 24, 2021](#)
(MessageBee reps will be available)

[Get a copy of the slides](#)

THANK

YOU!