



Workflows Tip of the Week

Module: Circulation

Summary: **Entering and searching for patrons by telephone number**

Note: You can search for a patron using his or her telephone number. This does not affect how you enter a telephone number in a patron record.

Instructions:

Follow the directions in the Patron Registration manual for entering a telephone number in a patron record. If you add a note after the telephone number be sure to leave a space between the number and the note. Include dashes between the area code, exchange, and number.

A screenshot of the SAILS Library Network patron record form. The form has a tabbed interface with the following tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Addresses" tab is selected. Below the tabs, there are three radio buttons labeled "Primary:", "Address 1", "Address 2", and "Address 3". The "Address 1" radio button is selected. Below the radio buttons, there is a section titled "Address 1" which contains a form with several fields. At the top left of this section are three icons: a search icon, a refresh icon, and a delete icon. The form fields are: "STREET" (dropdown menu) with "Main Street" entered; "STREET" (dropdown menu) which is empty; "CITY/STATE" (dropdown menu) with "Wareham" entered; "ZIP" (dropdown menu) with "00000" entered; "HOMEPHONE" (dropdown menu) with "508-000-0000" entered; and "WORKPHONE" (dropdown menu) which is empty.

1. Use the User Search option to search for the patron.
2. Enter the phone number in the Search For field. Do not enter the dashes in the telephone number.
3. For the Index field, select Home Phone.

Display User : User Search

Search for: 5080000000

Index: Home pho... AND OR Type: Keyword Browse

Library: ALL_LIBS

Current: [Lynn](#)
[888](#)

List of users

Name	User ID	Alt ID	Phone

- Click the Search button. The system will display a list of all patrons with that phone number in their record.

Display User : User Search

Search for:
Cell phone: 5080000000

Search for:

Index: Home pho... AND OR Type: Keyword Browse

Library: ALL_LIBS

Current: [Barbara](#)
[222](#)

List of users

Name	User ID	Alt ID	Phone
Barbara	222		508-000-0000
Lynn	888		508-000-0000