

Add a new patron record in Voyager Circulation

- **Product:** Voyager
 - **Relevant for Installation Type:** Multi-Tenant Direct, Dedicated-Direct, Local, TotalCare
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Question

How can I add (create) a new patron record in Voyager Circulation?

Answer

1. Before adding a patron record manually in Voyager Circulation, make sure double-check that the patron has the appropriate identification required by the library's policy.
2. *Perform a thorough search* to make sure you avoid creating a duplicate record for the patron.
3. Click on the Patron button in the Voyager Circulation task bar; this will open the Patron Search box.
4. Click CANCEL on the Patron Search box.
5. Right click within the grey space in the blank patron record that remains open.
6. Select "Add Patron..." from the pop-up menu.
7. The "Add New Patron Record" window will open.
8. Fill in the desired information on all five tabs, leaving the Barcode tab for last if you will be using a scanner to enter the barcode.
9. Requirements:
 - Name Tab: A last name must be entered.
 - Details Tab: Expiration Date and Purge Date is required
 - Barcode Tab: Select the appropriate patron group; enter the patron's barcode
 - Address Tab: Enter the patron's permanent mailing address
 - Phone Tab: Enter the patron's primary phone number
10. Click Save when finished
11. To add an Email Address or Temporary Mailing Address, click the Addresses <new> option on the right side of the screen. A blank Address Tab will open on the left.
12. Select the type of address from the Type dropdown menu. Enter the appropriate information making sure the in effect dates for the address are correct. Click Save.
13. Follow the same process to add an additional phone number. Click the Phone Numbers <new> option on the right side of the screen to open a new Phone Tab. Enter the appropriate information and click Save.

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- **Article last edited:** 18-Mar 2021