

BookPoints Documentation - "Certificate 2022" Feature

Batch Certificates

The "batch certificates" feature allows you to generate a single PDF that contains all of your patron certificates so they can be easily printed and distributed en masse.

By default, the "batch certificates" feature uses the "2022 BookPoints Star" certificate template. To select a different default template, please schedule a 1-on-1 with the BookPoints team to discuss configuration options. (In the next BookPoints version, you'll be able to upload your own certificate template here.)

Batch Certificates - Using Default Template

To use the "batch certificates" feature (either the default template or after a new template has been configured by the BookPoints team):

- Visit the "Reader Reports" page. [<https://SITE.bookpoints.org/library/reports/readers>]
- Configure specific criteria for which patron reports should be in the PDF (e.g., all readers from a certain branch or all readers who earned at least 500 points, etc.)
- Click "Generate certificate" button
- Click confirmation button
- A PDF should appear containing all certificates. You can download or save the PDF.

Batch Certificates - Select From Existing Templates

To use the "batch certificates" feature with the ability to choose an existing template:

- Visit the "Reader Reports" page. [<https://SITE.bookpoints.org/library/reports/readers>]
- Configure specific criteria for which patron reports should be in the PDF (e.g., all readers from a certain branch or all readers who earned at least 500 points, etc.)
- Click the orange "CSV" button at the bottom of the report page and save the resulting CSV report
- Visit <https://certs.bookpoints.org/>
- Enter your BookPoints email alias in the email field to validate your BookPoints membership
- Select a certificate style
- In the "BookPoints Reader Report" field, upload the CSV file you downloaded in the previous step

- Click the "Submit" button
- A PDF should appear containing all certificates. You can download or save the PDF.

Individual Certificates

The "individual certificates" feature allows you to generate and print a single patron certificate "on the fly" from the BookPoints app.

When using the "individual certificates" feature, you can choose from one of the six BookPoints 2022 certificates. (In the next BookPoints version, you'll be able to upload your own certificate template here.)

To use the "individual certificates" feature:

- Select the "Certificates (2022)" option from the Staff menu
[\[https://SITE.bookpoints.org/library/staff/certificates-22\]](https://SITE.bookpoints.org/library/staff/certificates-22)
- Search for the Reader you wish to generate a certificate for
- Click the "Get Certificate" button
- On the certificate customization form, you can customize the Patron's name or the Library name. Select one of the certificate styles
- Click Submit to get your certificate. You can download or print the resulting PDF.