

Carl.X

All information needs to be entered as it was in our old system, V-Circ. Do not use th, nd, street or st. Noting has changed on how information is entered except you do not put a period after the initials

Used all Capitol Letter –except Email address they needs to be lower case letters unless the customer uses both in their email.

Do not use nomail@home.com leave blank and choose “NO-Opted Out”

Student card- make the “Which address” to sponsor. The Parent /Guardian name needs to be entered as LAST NAME comma FIRST NAME MIDDLE INITIAL no period. The address only need to be enter in this area since all mail go to the Parent /Guardian not the student, unless they want their mail to go to a different address like a PO Box. Then the primary address would go with the student name and the PO Box would go with the Parent/Guardian name.

In Care Of C/O –needs to be the same address as your primary address. Put C/O person name in Address line, people who live in apartments sometimes needs the person name that is on the mail box to be on their mail. You will not be able to put business names on this since most people do not live at their business and if you use sponsor then the mail would only go the business and not the customer.

If the customer wants their mail to go to a different address be sure to change the “Which address” to secondary.

Just because a customer gives you a cell phone number and cell carrier they may still may not want to get text and have picked NO, in this case use “Cell – No text message”. It would be helpful if the customer change their mind on a yes or no question to circle the one they really want.

Be sure to look up all customers before issuing a new card. Hints- leave off Middle initial, look up addresses leave off words like dr, street, blvd etc don't forget you can use the wild card*in searches. If a card has noting on it I can delete the card from the system but I can no longer transfer old card to active new card. If something is wrong with both cards you will need to write notes on both cards about the other card including that LC # in the note.

Transfer Online Registration card to a new card or if they already have a card on file call Circulation Control and have it delete. Always look customers up before issuing another card. Change type – Online Registration to the right ID type after issuing a permanent card

Read notes that are on Customers' library cards; be sure to remove all notes that are no longer needed like duplicated card and returned mail after you updated the information. If placing a free text message note be sure to give your initials location. Predefine message does not give a location.

Annual Fee cards- We sending out letter two weeks before the Annual Fee cards expire and I manually add the fee to the cards that shows they paid the annual fee last year. If a customer comes in that wants to pay their \$40.00 make sure that the fee is not already applied to another house hold member card before taking the money from that customer. Then update the cards in the whole house hold a year

from the expired date or the paid date if the card has already expired. Do not put notes on the house hold cards on who has paid.

School card nothing has changed –They must be issued a new card each year.

Special Stop – When a customer has special stop that has been taken care of you need to let Circulation Control know so it can be removed do not delete the notes before calling Circ Control.

Emancipated Minors- After making the card a Student Restricted card, change “Which address” to “Primary”. Fill out the information and in the secondary Address line put Emancipated and yes to internet.

Please remove all paper notes before sending in your lost cards into Circulation Control that you have kept at your library for a while. Also remove notes such as “Lost item(s) or card held at desk” this does not help anyone if you have sent the card in.

Carl.X and POS

Refund of L/P found money- POS-When a customer pays for an item it loses the connection between the item and the money paid. All items are listed as fines with no item number attached to it. You will need to enter a note on the customer record with the title and item # of the item you refund the money for.

If a card that has L&P on it is transferred to a new card the L&P is not transfer to the new card. If the book is returned the old card will show up as the card that paid for it but that card will not be in the system any longer. You will need to get as much information as possible for us to find the information you need to do the refund.