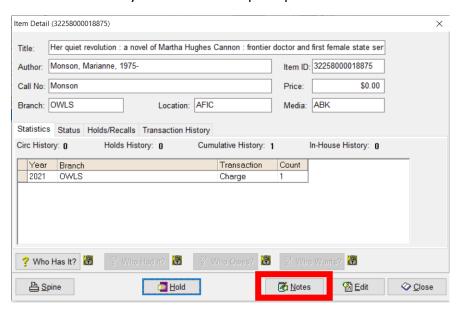
## Adding and Removing Notes to Items in CARL-X

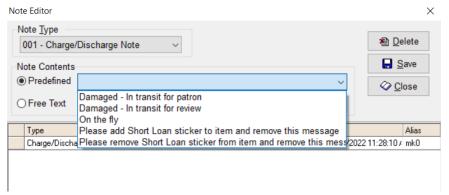
Staff can add a note to an item to indicate damage, how many pieces/parts, short loan stickers, etc. The below instructions will show how to add a note as well as removing the note.

## **Adding Notes in CARL-X**

1. Double click on any item barcode to pull up the Item Detail window



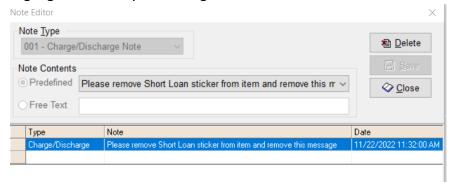
- 2. Click on the Notes button to bring up the Note Editor window.
- 3. From the Note Type dropdown, select "001 Charge/Discharge Note." Choosing this will ensure the note pops up each time staff scan the item. \*If you don't need the note to pop up when the item is scanned then a "Standard Note" will do as well.
- 4. From the Note Contents, choose either **Predefined** or **Free Text**, depending on what type of note you want to add. \*Choose **Predefined** for Short Loan items.



- 5. If using Free Text notes, add in your note making sure to be as concise as possible and including your initials, library code and date. ie "[note] MK/OWLS 11/22/22"
- 6. Click on Save when you are finished. Then click on Close.

## **Removing Notes in CARL-X**

- 1. Double click on any item barcode to pull up the Item Detail window
- 2. Click on the Notes button to bring up the Note Editor window.
- 3. Highlight the note you no longer need.



- 4. Click on "Delete."
- 5. Click on "Save" and "Close."