

Copy Patron Record

When creating records for multiple patrons of the same family and/or address, staff can use the Clone option to copy the address information into a new record to make the process quicker. Currently, the Clone option is not available in Connect.

Copying a Patron Record in CARL-X

1. Open the Patron module and click on the Patron function icon.
2. Use the binoculars next to the Name field to search for the patron/birthdate to ensure no duplicates will be made.
3. Once staff have created the new patron record and saved it, they can then click on the “Clone” button near the bottom of the window.

*If a record is already in the system that needs to be cloned, then staff can skip steps 1-3 and just open the patron’s record that needs to be cloned.

The screenshot shows the CARL-X Patron Record form for a patron named ABIGAIL TESTY. The form includes fields for ID (21389006699856), Name (TESTY ABIGAIL), Exp Date (03/12/2022), Branch (NOOCF), Type (Adult), Status (Good), and various address and contact information. The 'Clone' button is highlighted with a red box at the bottom of the form.

Field	Value
ID	21389006699856
Name	TESTY ABIGAIL
Exp Date	03/12/2022
Branch	NOOCF
Type	Adult
Status	Good
Primary Address	*****555 N RIVER ST****do not mail
City, State	RIVERS EDGE WI
Zip Code	12555
Phone	920-832-6365
Email	mkomp@owlsweb.org
Secondary Address	OWLS c/o MOLLY KOMP
City, State	225 N ONEIDA ST APPI WI
Zip Code	54911
Home Agency	OOAPL
Municipality	Appleton (city) Calumet C
School	
County	Calumet County

4. After clicking “Clone”, a new patron record will open with the address, secondary address (if there was one listed in the original record), phone number, email, patron type, and status listed.
5. Staff need to add in:
 - a. Patron Name
 - b. ID (barcode)
 - c. Any edits to the expiration date, branch, patron type, and status
 - d. Date of Birth
 - e. Which Address
 - f. Statistics: Home Agency, Municipality, and County
6. Once done verifying all information, click on “Register.”
7. Repeat steps 3-6 for each additional record that needs to be made with this family/address.