

How to Add a Fulfillment Note to an Item

A <Fulfillment Note> in Ex Libris Alma displays a pop-up message whenever an item is checked out or checked in.

This note provides staff with important information or warnings related to that item- such as loan restrictions, condition alerts, or routing instructions. Properly using <Fulfillment Notes> improves communication among Access Services, Technical Services, and Resource Sharing staff. It prevents missed item conditions, patron misunderstandings, or overlooked processing requirements.

Required Roles

To add or edit a <Fulfillment Note>, a staff member must hold one of the following Alma roles:

- Physical Inventory Operator
- Cataloger or Metadata Editor
- Circulation Desk Manager (optional)

1: Search for the Item Record A <Physical Items> search ensures access to the editable item record (rather than holdings or bibliographic levels). Fulfillment notes are attached to item records only.

- Use the persistent search box and set it to <Physical Items>.

Physical items

Search...

- All titles
- Physical titles
- Physical holdings
- Physical items
- Electronic titles
- Electronic portfolios
- Electronic collection
- Digital titles
- Digital files
- Collection
- Order lines
- Invoices
- Vendors
- Funds

Barcode	Title (Complete)	Author	Publisher
94007497104	Even the rat was white : a historical view of psychology / Robert V. Guthrie.	Guthrie, Robert V.	Harper and Row
94009621289	Shylock is Shakespeare / Kenneth Gross.	Gross, Kenneth, author.	University Chicago P
94011915141	Rights come to mind : brain injury, ethics, and the struggle for	Fins, Joseph, author.	Cambridge University Press

- Enter the item's title, barcode, or MMS ID and press <Enter> to run the search.

Physical items Barcode 31194006886570

Physical Items (1 - 1 of 1) 31194006886570

Institution Network Community

Select All Sort by: Rank Secondary Sort by: Rank

2: Open the Item Record Editor

Locate the correct item in the search results. The following two options open the same Physical Item Editor

- Do one of the following:
 - Click the barcode link to open the item editor, or

The bluest eye / Toni Morrison ; with a new afterword by the author.

Book (Book - Physical) By Morrison, Toni, (New York : Knopf : 1993.)

Barcode **31194006662476**

Library: American University Library

Creation Date: 07/04/2018 08:15 AM EDT

Modification Date: 06/05/2025 04:15 PM EDT

Process type: Lost

Expected Arrival Time: -

On Hold Expiration Date: -

Due Date: 09/14/2021 06:00 PM EDT

Needed By: -

Until: -

Permanent Location: Library Stacks

Receiving date: 02/21/2018 05:59 AM EST

Receiving operator: import

Other details

Call Number: PS3563.O8749 B55 1993

Call Number Type: Library of Congress classification

Status: Item not in place

Due back: -

Item Policy: Regular loan

Material Type: Book

Item ID: 23433525880004102

Holdings ID: 22433525930004102

MMS ID: 995287703604102

Withdraw Edit Item ...

o Select <Edit item>

1 **The bluest eye / Toni Morrison ; with a new afterword by the author.**
Book (Book - Physical) By Morrison, Toni, (New York : Knopf : 1993.) Call Number: PS3563.O8749 B55 1993 Item ID: 23662071390004102
Barcode: 31194012760082 Call Number Type: Library of Congress classification Holdings ID: 22433525930004102
Library: American University Library Status: Item not in place MMS ID: 995287703604102
Creation Date: 11/22/2021 09:58 AM EST Due back: -
Modification Date: 09/18/2025 04:48 PM EDT Item Policy: Regular loan
Process type: Loan Material Type: Book
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: 11/20/2025 10:00 PM EST
Needed By: -
Until: -
Permanent Location: Library Stacks
Receiving date: 11/22/2021 09:59 AM EST
Receiving operator: AU4452734
[Other details](#)

3: Access the <Notes> Tab In the Item Editor, select the Notes tab. The <Fulfillment Note> field controls pop-up alerts that display during checkout and return. Other Notes types, such as Internal or Public Notes, do not trigger circulation prompts.

- Scroll to the <Functional Notes> section.
- Locate the <Fulfillment Note> field.

< Physical Item Editor Cancel Save

General **ENUM/CHRON** **Notes** History

Functional Notes This tab has content Alt + 3

Public note

Fulfillment note

Internal Notes

4: Enter the Fulfillment Note Text In the <Fulfillment Note> field, type a clear, concise message describing the alert (e.g., “Check accompanying CD before reshelving.”). This text becomes the content of the pop-up shown to staff during checkout or check-in. Per Ex Libris guidance, overly long notes may truncate on smaller screens- keep entries brief but specific.

< Physical Item Editor Cancel Save

General **ENUM/CHRON** **Notes** History

Functional Notes

Public note

Fulfillment note

Internal Notes

5: Save the Item Record Click <Save> to record your changes. Saving commits the note to the item record and activates the pop-up message immediately for subsequent Fulfillment actions.

< Physical Item Editor Cancel **Save**

General **ENUM/CHRON** **Notes** History

Functional Notes

Public note

Fulfillment note

Internal Notes

Frequently Asked Questions

- *What if I don't see the <Fulfillment Note> field?*
 - Confirm that you are on the Notes tab and not in the General Information tab. Only the Notes section contains the <Fulfillment Note> field.
 - *Can multiple fulfillment notes exist for one item?*
 - No. Each item supports a single Fulfillment Note. To add new information, edit and update the existing text.
 - *Will the note appear for all users?*
 - Yes. The pop-up displays for any circulation or fulfillment user processing that item, regardless of desk or operator.
 - *Does the note display for requests and holds?*
 - No. It appears only at the moment of checkout or return, not during request routing or scanning into transit.
 - *Can public users see the Fulfillment Note in Primo VE?*
 - No. It is visible only to staff in Alma during fulfillment actions.
 - *Does removing the note delete transaction history?*
 - No. The note only affects staff prompts; it does not alter Analytics or Loan history.
 - *Can Fulfillment Notes be temporary?*
 - Yes. Staff can remove or edit them at any time. Consider dating temporary messages (e.g., "Hold for processing until 2025-04-15").
 - *How can I verify that a Fulfillment Note is active?*
 - Perform a test checkout. The pop-up should appear when scanning the item barcode.
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Revision #1

Created 21 October 2025 18:45:37 by Angelique Carson

Updated 19 November 2025 15:18:57 by Angelique Carson