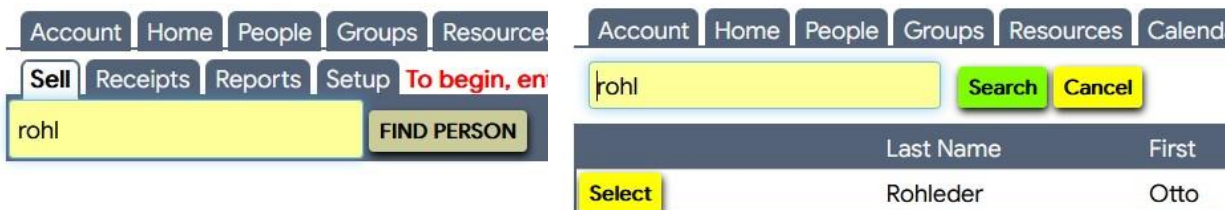


TO INITIATE A LOAN

Click on the POS tab

Enter all or part of the name of the RESIDENT for whom the item is to be on loan. The system will search for a match on as much as you enter.

Then select from list of matching results



Click on the LOAN tab below their name



We need to create a process for adding a client who is NOT currently in the system. (Name, Address, Phone Number, Email address)

We could:

- Have the client dictate the information for the volunteer to enter
- Direct the client to the library computer to use the Portal to add themselves to the system
- Have an iPad (perhaps older, donated?) to hand to the client to use the Portal to add themselves to the system

You will see a list of the categories of items for loan

Rohl **FIND PERSON** OTTO ROHLEDER (623) 536-1590 **CLEAR** 14973 W R
-- HOVER

HOME HEALTH WELLNESS **LOAN** SALE

Item Search... **SEARCH** MO TU WE TH FR **ADD TO or UPDATE CART**

CLEAR ITEM SEARCH

PRODUCT	PRICE	Override	QTY	NOTES	Subtotal
Cane <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Cane, Quad Foot <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Crutches <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Grabbers No units available	\$0.00		N/A		
Knee Roller <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Ramp <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Walker, 2 Wheel <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

TAKE THE CLIENT TO SELECT THE SPECIFIC ITEM(S) THEY WISH TO BORROW
NOTE THE ETCHED NUMEBR ON THE ITEM(S)

Back on the system click on "Chose Specific Item" box under the appropriate category
Click on the appropriate specific item from the drop-down list

The screenshot shows a software interface with a dropdown menu open. The dropdown menu lists the following items:

- ✓ Choose Specific Item
- RAMP-2
- RAMP-3
- RAMP-4
- RAMP-5
- RAMP-6
- RAMP-7
- RAMP-8
- RAMP-12

The background interface includes a header with "FIND PERSON OTTO ROHLER (623) 536-1590 CLEAR" and "14973 W R -- HOVER". Below the header, there are buttons for "LOAN" and "SALE", and a green "ADD TO or UPDATE CART" button. A table with the following columns is visible: PRICE, Override, QTY, NOTES, and Subtotal. The table contains several rows, with the "Ramp" row highlighted in yellow. The "Ramp" row has a price of \$0.00, an Override checkbox, a QTY input field, and a NOTES input field. Below the "Ramp" row, there is a "Choose Specific Item" button. The "Walker, 2 Wheel" row also has a price of \$0.00, an Override checkbox, a QTY input field, and a NOTES input field, with a "Choose Specific Item" button below it.

Enter the quantity in the blue box, AND THE DUE DATE IN THE NOTES BOX

Enter it as: Due: mm/dd/yyyy It is very important to enter the DUE DATE

NOTE: If the client is borrowing multiple items, you can process all items similarly on a single transaction. This example just has one item. Enter a Due Date for each

Rohl OTTO ROHLEDER (623) 536-1590 14973 W R
-- HOVER

HOME HEALTH WELLNESS **LOAN** SALE

Item Search... MO TU WE TH FR

PRODUCT	PRICE	Override	QTY	NOTES	Subtotal
Cane <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Cane, Quad Foot <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Crutches <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Grabbers No units available	\$0.00		N/A		
Knee Roller <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Ramp RAMP-7 <input type="button" value=""/>	\$0.00	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Due 06/15/202"/>	
Walker, 2 Wheel <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

Click on ADD TO OR UPDATE CART

You can add more items after UPDATING one, but you MUST click ADD TO OR UPDATE CART after making additional add(s)

You can remove item(s) from the cart BEFORE clicking SAVE (below) by pressing the red "X" button – but you MUST then also click ADD TO OR UPDATE CART

You will now see the CART SELECTIONS at the right.

Click on SAVE to complete the process

Sell Receipts Reports Setup **To add/update items to the cart, click the green ADD TO or UPDATE CART button**

FIND PERSON OTTO ROHLEDER (623) 536-1590 **CLEAR** 14973 W Robson Cir N Goodyear, AZ 85395-8864
-- HOVER FOR MORE INFO --

HOME HEALTH WELLNESS **LOAN** SALE

Item Search... **SEARCH** MO TU WE TH FR **ADD TO or UPDATE CART**

CLEAR ITEM SEARCH

PRODUCT	PRICE	Override	QTY	NOTES	Subtotal
Cane <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Cane, Quad Foot <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Crutches <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Grabbers No units available	\$0.00		N/A		
Knee Roller <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Ramp RAMP-7	\$0.00	<input checked="" type="checkbox"/>	1		\$0.00
Walker, 2 Wheel <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Walker, 4 Wheel <input type="button" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

CART SELECTIONS

Item	Subtotal	Tax
1) LOAN: Ramp ...Item: RAMP-7	0.00	--
TOTAL: \$0.00		

UPDATE CART **CLEAR**

SAVE

You will then see the RECEIPT panel for the transaction.

Sell Receipts Reports Setup

NEW sale for OTTO ROHLEDER **PebbleCreek Kare Bears** (623) 536-1200

POS RECEIPT #463230

Item	Price	Orig Qty	Orig Subtotal	Orig Tax	Returned	\$\$\$ Returned	Final Subtotal	Final Tax
(1) Ramp (AssetID: RAMP-7) ...Due 6/15/2024	\$0.00	1	\$0.00	\$0.00	<input type="text"/>		\$0.00	\$0.00
TOTALS:			\$0.00			-\$0.00	= \$0.00	

RETURNS: Complete this section if you are returning items.

Add Refund to Prepay? Refund Payment Type: Cash

RETURN ITEM

NOTES:

UPDATE NOTE

OTTO Rohleder
14973 W Robson Cir N
Goodyear, AZ 85395-8864

TOTAL SALE	\$0.00
PAYMENTS	-\$0.00
Balance	\$0.00

If someone other than the resident themselves is picking up the item:

Enter the name of the person who actually picked up the item and their phone number – in the NOTES box.

Click UPDATE NOTE (very important)

Use the orange PRINT LARGE RECEIPT button to print a copy for the client.

Select the HP OOFICEJET printer, not the RICOH printer



Item	Price each	#	(-)	Total
Ramp ... NOTE: Due 06/15/2024 (RAMP-7)	\$0.00	1		\$0.00
			Total:	\$0.00
RECEIPT NOTE: Pick up by Sue Pelletier 623-455-8076				

Note: Make sure that the RECEIPT NOTE is included. If not, you did not click UPDATE NOTE