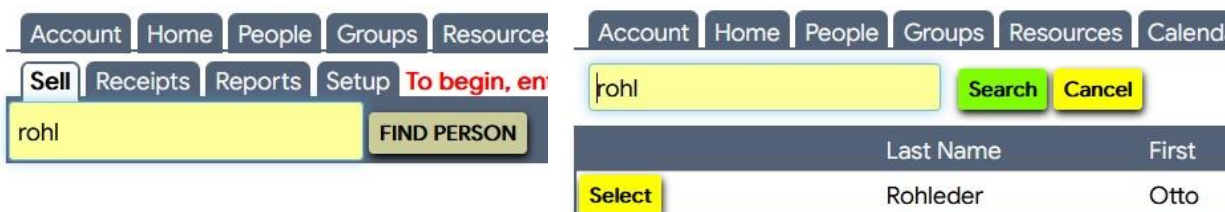


TO INITIATE A LOAN

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 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 <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 displays a software interface for processing a loan. At the top, there is a header with the text "KARE BEARS SchedulesPlus Procedures" and "PROCESS A LOAN Version: July 17, 2024 Author: Pelletier". Below the header, there is a navigation bar with a "FIND PERSON" button, the name "OTTO ROHLER" with a phone number "(623) 536-1590", and a "CLEAR" button. To the right, there is a location "14973 W R" and a "-- HOVER" indicator.

The main content area shows a dropdown menu for "Ramp" items. The menu is open, showing a list of items: "RAMP-2", "RAMP-3", "RAMP-4", "RAMP-5", "RAMP-6", "RAMP-7", "RAMP-8", and "RAMP-12". Below the list, there is a "Ramp" category with a "Choose Specific Item" button. Below that, there is a "Walker, 2 Wheel" category with a "Choose Specific Item" button.

The background shows a table with the following columns: "PRICE", "Override", "QTY", "NOTES", and "Subtotal". The table has several rows, each corresponding to a "RAMP" item. The "PRICE" column shows "\$0.00" for all items. The "Override" column has a checkbox for each item. The "QTY" column has a text input field for each item. The "NOTES" column has a text input field for each item. The "Subtotal" column is empty for all items.

	PRICE	Override	QTY	NOTES	Subtotal
RAMP-2	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-3	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-4	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-5	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-6	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-7	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-8	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
RAMP-12	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Ramp	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Walker, 2 Wheel	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

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

It is very important to enter the DUE DATE information in the NOTES box!

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 **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="text" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Cane, Quad Foot <input type="text" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Crutches <input type="text" 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="text" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Ramp <input type="text" value="RAMP-7"/>	\$0.00	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Due 06/15/202."/>	
Walker, 2 Wheel <input type="text" value="Choose Specific Item"/>	\$0.00	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

Click on 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)

NEW sale for OTTO ROHLEDER

POS RECEIPT #467356

Purchase Date: 6/05/2024 9:58pm

Otto Rohleder
14973 W Robson Cir N
Goodyear, AZ 85395-8864
(623) 536-1590

Item	Price	Orig Qty	Orig Subtotal	Orig Tax	Returned	\$\$\$ Returned	Final Subtotal	Final Tax
(1) Ramp (AssetID: RAMP-7) ...Due 06/15/2024	\$0.00	1	\$0.00	\$0.00			\$0.00	\$0.00
TOTALS:						\$0.00	-\$0.00	= \$0.00
TOTAL SALE						\$0.00		
PAYMENTS						-\$0.00		
Balance						\$0.00		

RETURN: Complete this section if you are returning items.
Add Refund to Prepay? Refund Payment Type: Cash

NOTES:
Pick up by Sue Pelletier 623-455-8076

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

PebbleCreek Kare Bears
Purchase Date: 06/05/2024
POS Receipt #: 467356
Purchased by: Otto Rohleder

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