## Section I: Develop Equipment and Equipment Infrastructure

### Lesson 1: Create Equipment Types

**Details:** Develop the equipment categories and types that will help you accurately report on loaned equipment.

* + - Create an equipment type for each of your centres to identify equipment that can be loaned out that centre.
    - Select Lendable Only.
    - If you want to create categories for your equipment this will help with the granularity of the reports you can generate.
    - Note: If you don’t see the equipment lending menu options you may need to check Equipment Lending in *Administration > Web Admin > Site Licensing*
    - *Tip: Administration > Equipment Settings > Equipment*

### Lesson 2: Create Equipment

**Details:** Add the lendable equipment to ActiveNet.

* + - Create two pieces of equipment for each of your centres. Follow the example below or experiment with your own types and quantities of equipment
    - Center 1
      * 10 basket balls
      * 6 Badminton Racquets
    - Center 2
      * 5 Soccer Balls
      * 8 Table Tennis Racquets
    - Center 3
      * 10 Pair Water Wings
      * 8 Pair Flippers
      * ***Note:*** *Add* ***pair*** *to names of water wings and flippers so it is clear that quantity relates to pairs of items and not individuals*
    - Link each piece of equipment to the correct **Equipment Type** and **Centre** in the **New Equipment** drop downs.
    - Set the **Equipment Status** to **Available**
    - Set the **Total Quantity** to the values stated above
    - Set the **Default Quantity** **to Lend**
      * Racquets to two
      * Basketballs, soccer balls, and pairs of flippers and water wings to one
    - Set the **Default Sign-In Status** to **Available**
    - *Tip: Administration > Equipment Settings > Equipment*

### Lesson 3: Create a Damaged/Lost Equipment Charge

**Details:** Create a new charge that will be applied to equipment that is never returned or returned damaged.

* + - Create a new GL account called **Damaged/Lost Equipment**
      * *Administration > Financial Settings > GL Accounts > Add New*
    - Give your charge an appropriate name such as Lent Equipment - Damaged/Lost Fee.
    - Set the Charge Type to Fee, your override to Always, and your Default Prefill Condition to Always.
    - Check all of your Charge Contexts, choose your appropriate GL account, and input your fee amount.
    - Set your Default Quantity to one.
    - Click Save.
    - *Tip: Administration > Equipment Settings > Charges*

### Lesson 4: Add your Damaged/Lost Fee to a New Equipment Charge Matrix

**Details:** Create a new charge matrix that will link your lost/damaged charge to equipment that is returned damaged or lost.

* + - Create a new Equipment Charge Matrix, select the charge you just created and select the Lendable Equipment radio button.
    - Click Save.
    - *Tip: Administration > Equipment Settings > Equipment Charge Matrix*

## Section II: Connecting Equipment Lending to POS

### Lesson 1: Create Equipment Layouts in POS

**Details:** The equipment lending module of ACTIVE Net ties into the POS module such that staff can use the POS interface to lend out equipment. This lesson will teach how to create equipment lending layouts in POS and what considerations to make if multiple centres lend out equipment.

* + - Create a new layout for each of your centres.
    - Name each layout appropriately so that it clearly identifies the centre it will be used for.
    - *Tip: Administration > Equipment Settings > Layouts*

### Lesson 2: Create a Sign-In Button

**Details:** Add a Sign-In button to each of your lendable equipment layouts

Select each of your Equipment Lending POS layouts and then select Layout Buttons or just click Buttons on the prior screen.

* + - Set the Button Type to Sign-In Lendable Equipment.
    - Ensure that the Lendable Equipment drop down is blank. This will allow any equipment to be returned via this button.
      * ***Note:*** *When equipment is signed in you must choose the individual who signed it out first, so when the Sign-In button is clicked only equipment signed out to that person will show up. For this reason having one Sign-In button is almost always the simplest and most effective way to design equipment sign-in.*
    - Check Visible, and uncheck Same Across all Layouts.
    - Style the button as you like and click Save.
    - *Tip: Administration > Equipment Settings > Layouts*

### Lesson 3: Lendable Equipment Buttons and Settings

**Details:**  Lendable equipment is lent out using the POS interface in a similar way to how items are bought through POS. This lesson will teach how to create the buttons that you will use to select which item is being lent out.

* + - Create the buttons for the layouts you just created.
    - Click on one of your layouts and click **Layout Buttons**
    - Select where you want to button to be placed on the layout similar to how we setup buttons in the POS training module.
    - Set the **Button Type** to **Sign-Out Lendable Equipment**.
    - Add a caption that identifies the item that can be lent out.
      * *For example your caption could be Basket Ball*
      * ***Note:*** *We will be creating a link from the main POS layout you created before that will take us to the lendable equipment for each centre so there is no need to identify the name of the centre in the lendable equipment button name. If you want to do this for added clarity though you can. If you were to do this your button might read Basket Ball – VRC (if one of your centres was Vancouver Recreation Centre).*
    - Design your button with the colour, style, etc. that you like and click **Save**
    - In each of your layouts create a button that will take you back to your main POS interface, or if you have a unique main interface for each centre make sure it links to the correct layout.
      * Set **Button Type to** **Link To Layout**, and select your default layout
      * Set your **Button Caption** to **Back to Main POS**, or an appropriately descriptive caption.
      * ***Note:*** *It is good practice to keep your navigation buttons in the same area and the same size across your layouts. For example your back button should be in the same place on all of your Equipment Lending layouts.*
      * ***Note:*** *It is a good idea to make navigation buttons a colour that stands out from the other buttons in your layout.*
    - *Tip: Administration > Equipment Settings > Layouts*

### Lesson 4: Linking your POS Layout to Equipment Lending

**Details:**  Whether you setup unique layouts for all of your different centres or operate all of your centres from the same main layout you will need to link from your main POS layout to the equipment lending layouts we created a couple of lessons back. The example below assumes you have one main layout for all of your centres so buttons are available to lend out equipment from any centre.

* + - Bring up the button layout for your main POS layout. This is where we will add the centre-specific buttons that will show us the equipment that can be lent from each centre.
      * Select blank button option
      * Set **Button Type to** **Link To Layout**, and select one of your lendable equipment layouts
      * Set your **Button Caption** to **Lend Equipment – Center 1** or an appropriately descriptive caption.
      * Do this for all three equipment layouts
    - *Tip: Administration > Equipment Settings > Layouts*

### Lesson 5: POS Navigation Testing

**Details:**  It’s always a good idea after setting up any links between POS layouts to test them out.

* + - Bring up your POS interface and click on a link to one of your centres equipment lending layout.
    - Navigate back to your default layout and test the other two centres. Make any necessary edits if the navigation is not working correctly.
    - *Tip: Front Desk > POS*