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LendEngine for Shedders

Our online catalogue, membership and booking systems are all managed by a nifty software package called LendEngine, developed by and for people who run libraries of things. It's generally straightforward, and you're going to be impressively smooth at all the actions in no time at all. In the meantime though, here's a short guide to get you through the first bits.

Where to Start

The ipad on the counter is already logged into the admin homepage. To get there you just push the button on the edge twice - once to wake it up, and once to get to the page with the number pad. The homepage is protected with a code which is easy to remember. We're not writing it down to add another layer of security.

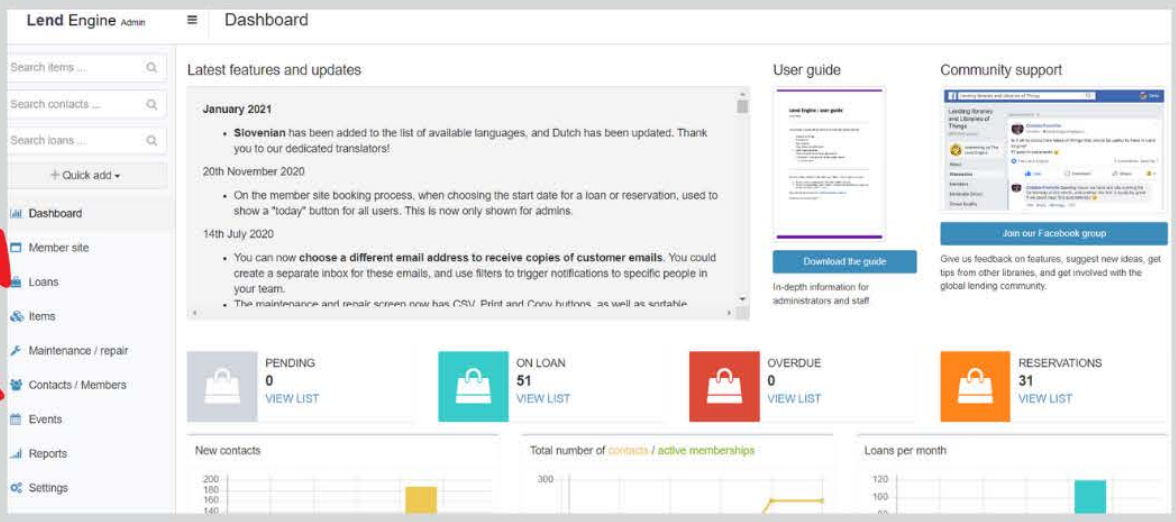
Once the code is in, you'll go to the admin homepage, which is pretty much the same as the catalogue homepage on the website, but with a couple of extras.

Here

The screenshot shows the website's header with navigation links: Home, Admin, My account, and Log out. The 'Admin' link is circled in red. Below the navigation is a search bar. The main content area features a message: 'We're a small-but-keen group of locals, working hard to set up a library of things in Letchworth. We are expecting to open on August 2nd.' There is also a link that says 'Click here to see all of our Things!'.

Clicking on the 'Admin' button at the top will take you to the 'back-end' of our LendEngine site, the Dashboard, which looks like this....

All the useful links here

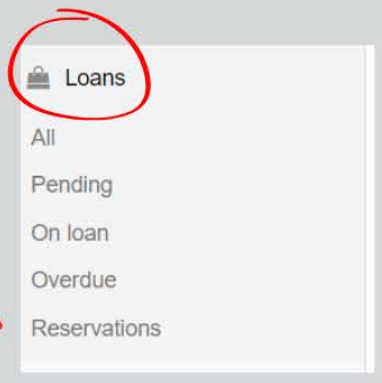


Checking what's due for pick up

- Short version - 1. (start at) Dashboard
- 2. (click on) Loans
- 3. (from the drop down menu, click on) Reservations

Longer version

From the Dashboard, find the 'Loans' button on the list on the left, and click. This will give you a drop down menu that looks like this



At the bottom of the list is 'Reservations' - click on this and you'll be taken to the page with all upcoming reservations in date order.

ID	Status	Item	Code	From	To	Fee	Action
94	RESERVED	Thermal Camera FLIR E6 Jeremy Sonander : jeremy.sonander@me.com	LGS0044	Sat. 19 Aug 2023 1:00 pm	Fri. 25 Aug 2023 8:00 pm	0.00	Action
101	RESERVED	Jetwash Karcher K4 Jacqueline Shapheit : kksjexxi@gmail.com	LGS0243	Fri. 25 Aug 2023 4:00 pm	Fri. 01 Sep 2023 8:00 pm	4.00	Action
83	RESERVED	Airbed Carla Clark : hertsVintagehire@gmail.com	LGS0138	Thu. 31 Aug 2023 10:00 am	Thu. 07 Sep 2023 2:00 pm	4.00	Action
81	RESERVED	4-person tent - TSC-1610 Carla Clark : hertsVintagehire@gmail.com	LGS0199	Thu. 31 Aug 2023 10:00 am	Thu. 07 Sep 2023 2:00 pm	8.00	Action
82	RESERVED	Airbed with pump Carla Clark : hertsVintagehire@gmail.com	LGS0137	Thu. 31 Aug 2023 10:00 am	Thu. 07 Sep 2023 2:00 pm	4.00	Action
61	RESERVED	Pizza Oven	LGS0208	Fri. 01 Sep 2023	Fri. 08 Sep 2023	12.00	Action

(Clever thing you can do - click on the 'date range' button at the top of the page, and click on the 'today' shortcut button which is *under* the calendar, then hit 'filter' - this will give you just the pick ups due for the day).

Starting/ confirming a membership

3.

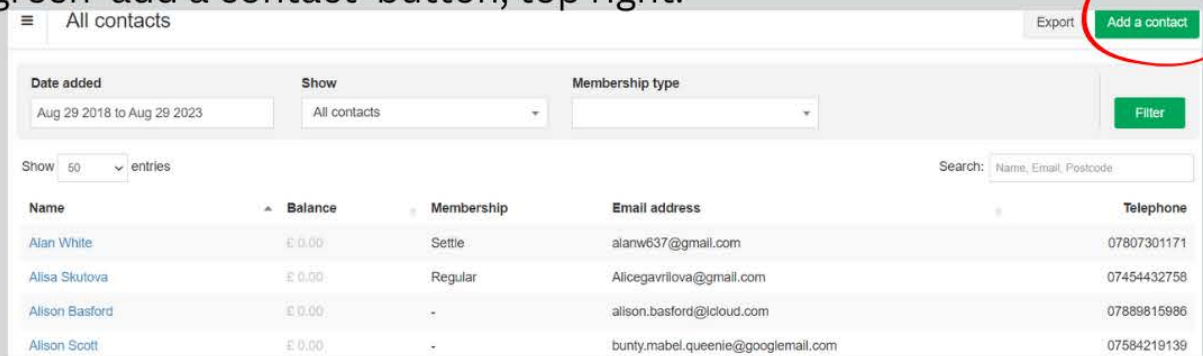
The important thing to remember here is that LendEngine enrolls people as contacts first, and then adds them as members. Starting a membership therefore has two separate steps. We're finding that often people signing up online have done one part but not the other.

Short version 1. (start at) Dashboard

2. (click on) Contacts/ members
3. (click on) Add a contact
4. Get member to fill in contact info
5. Check proof of address, put date into 'Address confirmed'
6. (click on) 'save contact'
7. (click on) 'add membership'
8. Membership type (regular/ settle),(click on) 'subscribe'
- *9. Regular memberships, select payment method, click on 'subscribe'

Longer version

From the Dashboard, find the 'contacts/ members' button on the list on the left, and click. This will take you to a list of all the contacts. Look for the green 'add a contact' button, top right.



Click on the 'add a contact button'. This will take you to the 'Add a new contact page', which looks like this.

The screenshot shows the 'Add a new contact' form. It has several sections: 'Contact information' with fields for First name, Last name, Address, Email address, City, Telephone, and Membership number; 'Access to your Lend Engine site' with checkboxes for 'Can log in to Lend Engine public site' and 'Send a welcome email with login details'; and 'Access permissions' with checkboxes for 'Staff (log in to admin)' and 'Administrator (manage account settings)'. There are also fields for Postcode, Country (set to United Kingdom), and Preferred language (set to English). A red circle highlights the 'Address Confirmed (YY/MM)' field, with a red arrow pointing to it and the text 'For the Shedder to fill out'. Another red arrow points to the 'Membership number' field with the text 'Assigned when the membership is completed'. Three red arrows on the left point to the 'First name', 'Last name', and 'Telephone' fields with the text 'For the new borrower to fill out'. A 'Save contact' button is in the top right corner.

For the Shedder to fill out

Assigned when the membership is completed

For the new borrower to fill out

4.

Hand the ipad to the new borrower, and ask them to fill in the contact details. Once they're finished, ask for proof of address - we need something with their address and name on it to confirm they live where they say they live. A drivers license is perfect, as is any utility bill, but if people get stuck, you can suggest looking at a bill that's arrived by email on their phone - just check the name and address are on the same document, and that they match the details in the form.

Confirm the address by entering two digits for the year and then the month (October this year would be 23/09, and so on), and then finish this step by clicking on the green 'save contact' button, top left.

All filled in?

Then click here

This will take you to a page that looks quite similar, but is the new contact's page, and importantly has the the 'add membership' link in blue on the greyed out line under the name.

This will take you to the 'Subscription payment' page. Currently we have two types of subscription, 'Regular' (which the borrower pays for) and 'settle' (which is pre-paid by settle, and free to the borrower). Click the 'subscribe' button on the appropriate membership.

Choose one

Almost there - payment. If you've hit the 'subscribe' button for the 'Regular' membership, you'll go to this page.

The screenshot shows a web form for a subscription payment. At the top, there are tabs for 'Loans' and 'Payments'. Below that, it says 'Subscription payment Angela Fake' with a 'Send email' link. The form has several sections: 'Choose a membership type' with a dropdown menu showing 'Regular (365 days, 10.00)'; 'Membership cost' with a text input showing '£ 10.00'; 'Payment amount' with a text input showing '£ 10.00'; and 'Payment method' with a dropdown menu. There is also a text area for 'Add an optional note for this payment' and a green 'Subscribe' button. At the bottom, there is a small note for administrators.

Hit 'subscribe' again on this page to complete

Choose a payment option from the drop-down menu

Click on 'payment method' and choose an option from the drop-down menu, then click on 'subscribe' to complete (the 'subscribe' button won't work unless a payment method has been chosen). This completes the membership and automatically sends a 'welcome' email to the new borrower. Take payment through the point of sale screen, and you're done!

Checking out a booked item

- Short version**
1. Find the Reservation (via 'loans' contact/ item search)
 2. (click on) Check out
 4. Choose payment
 5. Check out

Longer Version

This is another transaction where you've got to make sure you do it 'twice'. Here, there are two green 'check out' buttons on different pages that need to be pushed.

Firstly, find the reservation. Starting at the Dashboard, go to 'loans'. You can search for it by the borrower's name or the name of the item.

Search by either the borrower's name or the item in 'loans', here

By item....

Search items ...

Search contacts ...

steam cleaner

By the name of the borrower...

Search items ...

Search contacts ...

delila

6.

Either should get you to here, the reservation.

Loans Payments

Reservation #316 Delila Send email Print Reserved

Available after 25 October 12:00 pm from 69 Leys Avenue

Steam Cleaner

Code: LGS0205

Serial: 107659 10220

Due at 01 November 4:00 pm (7 days)

Return to 69 Leys Avenue

[Remove](#)

[Add stock item](#) [Add loan item](#) [Add service item](#)

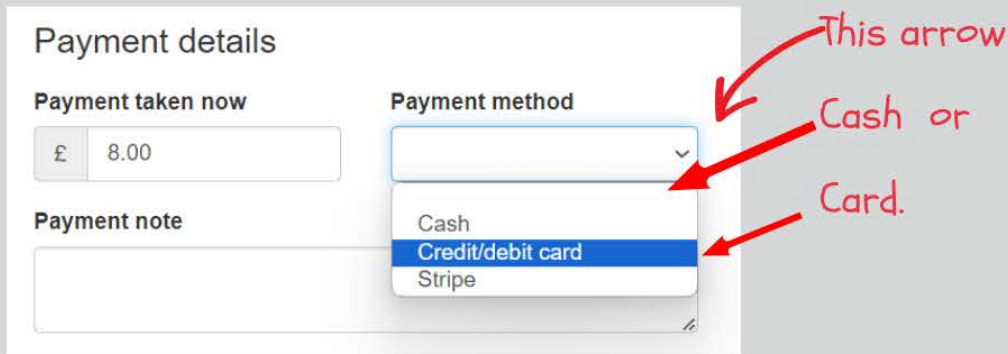
Total	£ 8.00
Charged to account	£ 0.00
To pay	£ 8.00

Payment details

Payment taken now Payment method

7.

The system won't show you the green 'check out' button until you've taken a payment. Scroll down a bit, and click the arrow to get the drop-down menu of payment options....



...and select either 'Cash' or 'Credit/debit card' (Stripe is the system used for when people pay online).

Once you've clicked on a payment option, the green button near the bottom will change from 'select payment method to take payment' to 'check out'.



It's easy at this point to think you're done (trust me - we made this mistake for *weeks* when we first opened!), but remember the 'do it twice' nature of LendEngine. Clicking on 'check out' here will take you to another page, where you have to scroll down and click another green 'check out' button to complete the transaction and get the aqua 'on loan' status.

