

Equipment Checkout

CSI Software's Equipment Checkout module for Spectrum NG is designed for facilities that wish to easily check out, rent, or reserve equipment for their patrons to use. It fully integrates with all of the other CSI Software modules, allowing you to reserve equipment on Event Management functions, collect rental fees through Point of Sale, and charge Late Fees or Replacement Fees directly to a member's account.



The Equipment Checkout module allows you to set up a separate equipment inventory for each location in your facility, and it will keep track of the equipment reservations and invoices separately by location. What this means to you is that your indoor equipment center will only be able to see and check out their equipment, and the outdoor adventures center will only be able to see and check out theirs. You are also able to denote equipment as either an Inventory Item, allowing you to keep track of who has each specific item, or as a Bulk Item, for equipment such as towels where you do not track each individual item, but wish to know who has one of the items checked out.

Equipment Setup

Setting up your equipment is an easy and intuitive process. You start with configuring the General Setup for your location, then proceed with creating the various equipment Categories, Inventory Types, and Bulk Types. You then create the individual Items for your inventory types, and you finish by setting up the shortcut keys for your workstation.

General Setup allows you to define the basic parameters for each Location within your facility. For example, you can specify things like the End of the Business Day, Deposit Item Codes, and whether or not signatures are required, to name a few.

Equipment Category Setup allows you to divide all of your equipment up into user-defined categories for ease of searching and for reporting purposes. Equipment searches can be filtered by category.

Bulk Type Setup allows you to set up all of the equipment types with items that you do not need to specifically track. This is ideal for things like towels, tennis balls, racquet balls, softball/baseball bases, and more.

Inventory Type Setup allows you to set up all of the equipment types with items that you do need to specifically track. This is for things like basketballs, volleyballs, weight belts, tennis, racquetball, badminton, or squash racquets, and more. Both the Bulk Type Setup and Inventory Type Setup will allow you to specify pricing for a variety of checkout durations and for the various membership types in your facility.

Equipment Package Setup allows you to group Bulk Types and Inventory Types into packages, complete with a package price. For example, if someone is going canoeing, you can check out a Canoe Package, complete with Canoe, Paddles, and Life Preservers, instead of needing to check out each piece of equipment individually.

Equipment Shortcut Keys Setup allows you to assign equipment a series of shortcut keys on the Equipment Checkout screen. The shortcut keys were designed to be similar to the already-familiar Point of Sale system, and therefore you can set up shortcut keys to point to specific, popular items, or you can set them up to open up a listing of items within a category.

Checking Out or Reserving Equipment

The Equipment Checkout process was designed to be as quick and efficient as possible. You start by scanning or swiping the member's membership card. This will bring their information and picture up on screen so you can verify their identity and eligibility. Next, you select the equipment you want to check out by clicking the type, then choosing from a list of individual items that are currently available (for Inventory Types). The third and final step is to click Check Out. If there are fees involved, you will be taken directly to Point of Sale to collect those fees.

To Reserve equipment, the process is very similar and uses the same screen. You merely add the step of defining the reservation dates before choosing the equipment, then you click Reserve instead of Check Out. If you wish, you may collect Deposits, or even collect the entire fee at the time of reservation.

The screenshot shows the 'Equipment Checkin Main' window. It has a menu bar with 'File', 'Action', and 'Help'. Below the menu are two tabs: 'Checkin' (selected) and 'Repeat Invoice'. The window is divided into several sections:

- Member Information:** Member#: MEM14, Name: Rachel Greene, Phone: (713) 555-8958 Ext., Membership: M.
- Equipment Information:** Invoice#: 84, Invoice date: 4/21/2009, Checkout date: 4/21/2009.
- Equipment(s):** A table with columns: Equipment, Item#, Qty Checked Out, Qty Checked In, Status. One row is visible:

Equipment	Item#	Qty Checked Out	Qty Checked In	Status
Women's Basketballs	WB001	1	0	Active
- Checkin Date:** A dropdown menu showing '4/21/2009'.
- Checkin Comments:** A text area.
- Checkin:** A section with buttons for 'Damaged', 'Lost', and 'Checkin'. There are also buttons for 'Edit Equipment Status' and 'Charge Late Fee' on the left side.

Checking In Equipment

The Equipment Checkin process is also designed to be quick and easy. You will see a list of all outstanding invoices for the Location you are in. You may choose from the list, or scan or swipe the member's membership card to see only their invoices. You double-click on the invoice, choose the equipment to be checked in, then click Check In. If the equipment is lost, damaged, or late, you may also take the appropriate actions from this screen as well.

With all of these features, you can see that CSI Software's Equipment Checkout module further allows Spectrum NG to be a fully-integrated, single-source management solution for your facility.

Summary of Features Sidebar

- Separate inventories by Location
- Separate outstanding invoice lists by Location
- Bulk and Inventory Equipment Types
- Customizable pricing structure
- Group equipment into Packages
- Automatically charge Late Fees & Replacement Fees
- Reserve equipment ahead of time
- Charge both Reservation Deposits and Rental Deposits
- Fully integrates with the membership database and financial systems
- Members can have multiple rentals simultaneously
- Can specify different pricing for Members and Guests
- Know who has your equipment at all times

