

Borrower Management

Adding Borrowers through Borrower Management

Entry Tips: Using the tab key will move you from field to field in the Edit Borrower screen.

Adding Borrower Steps:

1. This can done from the Manage Borrowers menu screen:
2. Place the mouse arrow on the gray button labeled Action, which is located upper left menu, and pick Add New.
3. Single click the left mouse button. This brings up the Borrower Profile form. It automatically defaults the blinking cursor to the Borrower ID entry line.
4. Scan the barcode on the back of the new patron card or you can hand enter their barcode number: *(Example for PUBLIC Libraries - ALL PATRON BARCODE NUMBERS START WITH the number 2 AND ARE FOLLOWED BY EITHER 4 OR 5 ZEROS THEN COMES THE PATRON CARD NUMBER (totaling 14 digits) THEY HAVE ALREADY BEEN PRE-ASSIGNED to the card.)*
5. Their barcode number is now in the Borrower ID entry line
6. Press the tab key and begin to fill in the fields of information.
7. Hold down the Ctrl key while striking the letter S key or *place the mouse arrow on the word File in the top left of the screen; single click the left mouse button; place the mouse arrow over the word Save which then becomes highlighted; and single click the left mouse button*
8. This will return you to the Mange Borrower screen; repeat this process to add additional Borrowers.

Note: add as much information as you have time for, always enter enough information for Circulation.

The screenshot shows the 'Edit Borrower' window in a library system. The window title is 'G3 Library System - us.lrnsl.com - Remote Desktop'. The main content area is titled 'Borrower Profile' and contains the following fields and sections:

- Borrower Profile:** Borrower ID (with 'Change ID' button), Teacher ID, Class Period (dropdown), Group (dropdown), Last, First, MI, Address 1, Address 2, City, State (dropdown), Zip Code, County, Date of Birth (mm dd yyyy), Phone 1, Phone 2, E-Mail, Care Of, Notes, Secondary ID, and Secondary ID Type (dropdown).
- Borrower Photo:** A placeholder for 'No Photo' with 'Scan', 'Set', and 'Clear' buttons. Below it are 'I Use Policy Accepted' and 'Restrict Account' buttons.
- Online Reservations:** 'Send Welcome Email' button, 'Allow this Patron Online Reservations' button, 'Preview Welcome Email' button, 'Temporarily Suspend Online Reservations' button, and a PIN field with the value '1234'.
- Borrower Associations and Programs:** A list of checkboxes: 'Reader of the Month', 'Young Citizen Program', 'Honors Reading', 'Spanish Reading Club', 'N/A', and 'N/A'.