



Instrument Loans

Checking band-owned instruments out to members — signed, tracked, and returned whole — without a spreadsheet or a shoebox of paper forms.

Most bands already lend instruments; the record of it usually lives in someone's memory. A sousaphone at a member's house, a bassoon nobody remembers signing out, a gig bag that came back without its mouthpiece. Backstage Baton turns each of those handshakes into a loan with a signed agreement, a visible timeline, and an honest check-in — while keeping the human part exactly as easy as it was.

This guide is for whoever manages your equipment — the equipment manager, a band manager, or a president wearing both hats. Members never need any of it: they sign from an emailed link, or on paper in person if that suits them better.

A LOAN, START TO FINISH

1

CHECK OUT

Pick the member and the item — or several items at once.

2

SIGN

By an emailed link, or on paper in person. No app, no login either way.

3

ON LOAN

A progress line shows where every loan stands; reminders are one click.

4

CHECK IN

Condition, accessories, anything wrong — and a thank-you sent for you.

Before your first loan

Two things worth doing once, both on the **Equipment** page. Fifteen minutes, and every loan after that is under a minute.

Write your loan agreement — in your words

Under **Equipment** → **Loan agreement**, the agreement borrowers sign is fully yours: your title, your opening text, and a list of clauses each borrower ticks individually (“I will return it in the condition I received it,” “I am responsible for repairs due to negligence” — whatever your board has already decided). If your band has a paper loan form today, its wording moves straight in.

The same editor has **Print blank form**: your agreement with every field left as a write-in line. Keep a few at the table on inventory day, or for a family who will only sign on paper.

Changing the wording saves a new version, and every loan records the version it was signed under. Anyone who signs from then on — including a loan already out and waiting for a signature — sees the new wording.

View previous versions in the same editor shows each earlier wording with its clauses, so “signed v2” always means something you can read.

Already have loans out on a handshake? Record them without a signing email — a loan can be created with no agreement and no due date, so long-standing arrangements land in the system as they are. Nothing is forced on people who borrowed a tuba three years ago.

Give your items a home

Each item’s **storage location** is one of your band’s Locations, so “where does the gong live?” has an answer — and each Location page lists everything stored there. Serial numbers, inventory tags, photos, and values all live on the item record; if your inventory is in a spreadsheet, **Smart Import** reads it in as-is.

ONE-TIME CHECKLIST

- ☐ **Loan agreement written** — Equipment → Loan agreement. Your clauses, your wording.
- ☐ **Inventory in, with serials and tags** — so the loan names the exact instrument, not “a trumpet.”
- ☐ **Accessories listed per item** — the check-in checklist is built from this list.
- ☐ **A few blank forms printed** — Print blank form, in the same editor, for signing on paper.
- ☐ **Existing handshake loans recorded** — no agreement, no due date — just so the system knows who holds what.

The checkout and the signature

From any item — or from the Loans tab's **New loan** button — pick the member, confirm what's going with it, and optionally set a due date.

One item or a cartload

A loan can carry several items at once — the whole percussion cart to one volunteer's van is a single loan with a single signature. Each item still checks back in individually, and the completion thank-you goes out when the last one is home.

The accessories snapshot

Whatever accessories the item lists — gig bag, mouthpiece, mallets — are recorded as going out with it. That snapshot is what check-in is measured against, so "did the mouthpiece come back?" is a checkbox later, not an argument.

The signature: online or on paper

At checkout you choose how the agreement gets signed. Both count the same, and a loan waits at its first stop until it's signed either way.

- **Email a signing link** (the default). The borrower receives your agreement by email and signs from the link — **no app, no account, no password**. They tick each clause, sign, and the loan activates; you're notified when it's done.
- **Paper — print and sign in person**. For the borrower or parent who won't do anything online. No email is sent. Checkout finishes on **Print agreement**: the same agreement, one page, with a box to tick beside each clause and a line to sign. Meet them, get it signed, then open the loan on the Loans tab and click **Record signed paper copy**. The loan activates exactly as an online signature would, for every item on it. Keep the signed sheet in your files.

Under 18? Tick "Borrower is under 18" and enter the parent or guardian's name and an email *or* a phone number — either one works. They are the responsible signer: by email the link goes to them, on paper they sign the printed sheet. No guardian email? Choose Paper.

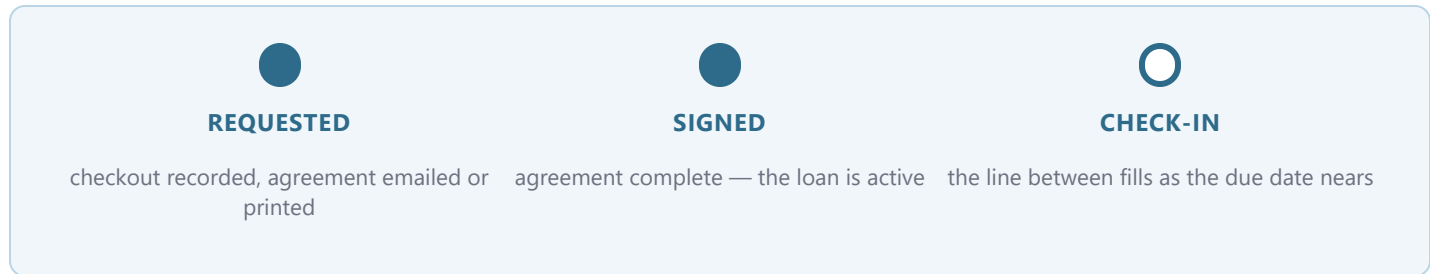
Changed your mind later? An unsigned loan always shows **Print agreement** and **Record signed paper copy** on its card, and a paper loan can still be signed online if the signer comes round.

Due dates are optional — on purpose

A season-long loan to your own bass clarinetist doesn't need a return date. Set one when it matters (a summer camp borrow, a trial period), skip it when it doesn't, and change your mind later — extending or removing the due date is one click on the loan card.

While it's out

The **Loans** tab shows every active loan as a progress line — where it stands is visible at a glance, and the next action is always one click away.



When a loan has a due date, the final segment fills with time — teal while there's runway, amber in the last days, red once it's overdue. A loan with no due date simply shows its line to check-in.

Nudges — with your words, never behind your back

- **Unsigned for several days?** The card offers a signing reminder by email. When the signer has no email, the card offers Print agreement and Record signed paper copy instead.
- **Due soon or overdue?** It offers a friendly “need more time?” check-in instead of a scolding.

Either way, the email opens in an editor first — Backstage Baton drafts the wording, you make it yours, and **nothing sends sight-unseen**. Replies go to you, not to a no-reply address. The card remembers when a reminder went out so you don't double-nudge.

Extending is not a failure state. If the borrower needs more time, the same card moves the due date — or removes it entirely — in one step. The loan just keeps going.

The return — and what the system remembers

Mark returned walks through three honest questions: what condition is it in, did everything come back, and is there anything to note. The borrower gets a thank-you email automatically.

Missing accessories never blame the next borrower

Anything unchecked at check-in flags the item **Incomplete** until a human resolves it — the piece came back, or it was replaced. Until then, the *next* checkout automatically leaves the missing piece off its list, so nobody signs for a mouthpiece they never received. An **Incomplete** filter on the inventory pulls the whole worklist in one click.

Repairs get a record, not just a flag

A rough return can flag the item **Needs repair** right from check-in. From there the workflow has a middle and a memory:

- **Send for repair** — note the shop and date; the item shows **At repair** so it's never confused with one nobody has dealt with.
- **Mark repaired** — date, cost, what was done, and (if it changed) the new condition. The flag clears, and what was wrong moves into the item's **repair history** instead of being erased.
- Fixed it yourselves? Mark repaired straight away — one step, same record.

Because costs are on the record, "what did we spend on repairs this year?" finally has an answer.

And when the board asks what it's all worth

The **Equipment Value report** (under Reports) turns the same inventory into a document for insurance conversations and grant asset lists — every value dated, owned and borrowed items never blended, ready to print or export.

Common questions

Do borrowers need the app?

No. The agreement signs from an emailed link in any browser, or on paper in person. Members who never log in to anything can still borrow an instrument.

A parent won't sign anything online. Now what?

Choose **Paper** at checkout. Print the agreement, have it signed when you meet, then click **Record signed paper copy** on the loan. It counts exactly like an online signature.

What about loans that already exist?

Record them without a signing email or due date. The point is that the system knows who holds what — formalizing old handshakes is your call, not a requirement.

Can one person borrow several things at once?

Yes — one loan, one signature, however many items. Each item checks back in on its own, and the thank-you goes out when the last one is home.

Who signs for a minor?

The parent or guardian. Tick “Borrower is under 18” at checkout and give their name plus an email or a phone. They sign by the emailed link or on the printed sheet, and are recorded as the responsible signer.

What happens if something doesn't come back?

The item is flagged Incomplete with exactly what's missing and since when. Resolve it as returned or replaced whenever it's settled — and in the meantime, the next borrower is never asked to sign for it.

Is a due date required?

No. Set one when the loan has a natural end, skip it for season-long arrangements, and extend or remove it any time from the loan card.

Does the reminder email send automatically?

No email in the loan flow sends without you seeing it first. Reminders open in an editor with a suggested draft; you adjust and send. Replies come to you.

Where do I see repair spending?

Every completed repair carries its cost on the item's history. Item by item today; a season roll-up is on the roadmap.

Which plan includes loans?

Instrument loans are part of the Complete plan. On Essentials you keep the equipment inventory, repairs and the value report, and anything already checked out stays on the Loans tab and can still be marked returned.