



Instrument Loans at a Glance

One page for your board and equipment manager: how band-owned instruments get checked out, signed for, tracked, and returned — with a paper trail the whole way.

THE LOAN, START TO FINISH

1

CHECK OUT

Pick the member and the item (or several at once — the whole percussion cart is one loan). Accessories going out are listed; a due date is optional.

2

SIGN

Your own loan agreement, signed from an emailed link or on paper in person — no app, no login. Under 18? The guardian signs.

3

ON LOAN

A progress line shows where each loan stands — requested → signed → check-in — with time filling in. Reminders and “need more time?” notes are one click; you edit before sending.

4

CHECK IN

Mark the condition, tick off each accessory that came back, note anything wrong. The borrower gets a thank-you email automatically.

Extending a loan — or removing the due date entirely — is one click on the loan card. Instrument loans are part of the Complete plan.

WHAT THE SYSTEM GUARDS

- **A missing mouthpiece never blames the next borrower.** Anything not returned is flagged on the item as *Incomplete*, and the next checkout leaves it off the list until it's resolved as returned or replaced.
- **Nothing quietly goes overdue.** Loans coming due or past due surface on the Loans tab with the reminder one click away.
- **Every step is recorded** — who checked out what, when it was signed, what condition it came back in, and what was missing.

REPAIRS GET A RECORD TOO

- An item flagged at check-in can be **sent for repair** — vendor and date noted, the item shows *At repair* until it's back.
- **Mark repaired** closes it out with the date, the cost, and what was done — the history stays on the instrument forever.
- Repair costs are on the record, so “what did we spend on repairs this year” has an answer.
- The **Equipment Value report** turns the same inventory into an insurance-conversation and grant-asset list — owned and borrowed never mixed.

NOBODY GETS LEFT BEHIND

- Borrowers never need the app or a login — they sign from an emailed link, or on a printed copy you then **Record signed paper copy**. Guardians by email or phone.
- Loans that predate the system can be recorded without an agreement or due date — nothing is forced on existing arrangements.
- The agreement wording is **yours**: your clauses, your checkboxes, edited any time under Equipment → Loan agreement. Every earlier version stays readable.

Where it lives: everything is on the **Equipment** page — Inventory for the items (photos, serials, values, storage locations), Loans for active checkouts and their progress lines.