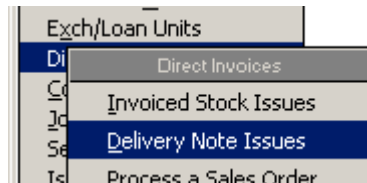## DEALING WITH LOAN ITEMS

If you need to Loan an item then we recommend the following procedures for Rotable Items in your Inventory and for your Tools & Equipment
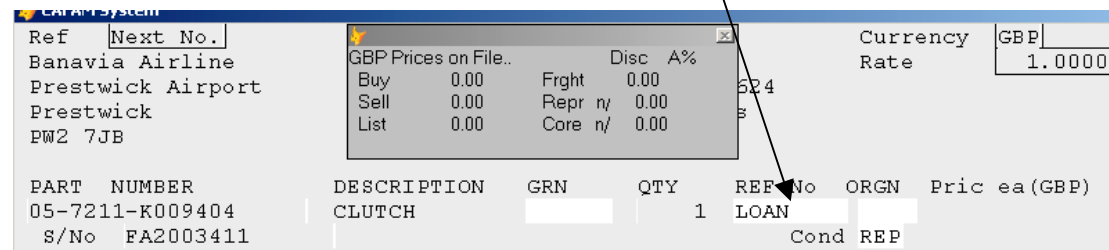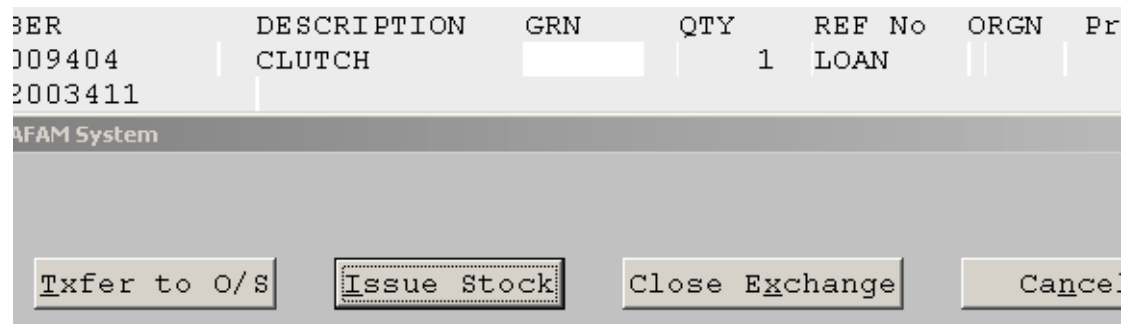
ROTABLE ITEMS
OUTGOING

1. Use the Delivery Note Issue option to create the transaction for both Outgoing and Return process

2. Once you are past the initial prompts and have selected the Part No and Serial No from your Inventory, enter the word "LOAN" under the Ref No
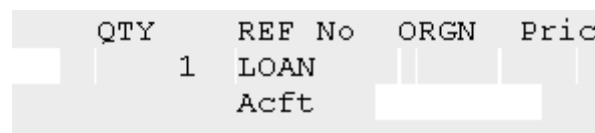

3. Complete the process by selecting "Issue Stock" to move the item OUT

4. Either the Aircraft prompt or leave Blank i.e. enter the Delivered to Regn if known

5. Proceed to print the Delivery Note Document as per normal from "Print Above Items". This now creates your Outgoing Delivered record

ROTABLE ITEMS
RETURN

1. For the Return we would recommend using the Original Delivery Note number to add to with a minus –1 Qty as follows

2. Proceed to enter the original "Outgoing" Part No an Serial and enter a minus –1 Qty to denote this as a Return with Ref No tagged with "LOAN" and Origin tagged as "RTRN"

3. Complete the process in the same way as you did for the Outgoing transaction above, but enter "QUAR" when prompted for the Aircraft

    Use the same [ISSUE STOCK] as in step 3 above

4. Print the Delivery Note as per normal from "Print Above Items". This now completes your Outgoing and Return Delivery record

<u>REPORTING</u>

1. A full history of the above will list under Inventory Control for the Part Number showing the item was routed to QUAR for further Return to Service action
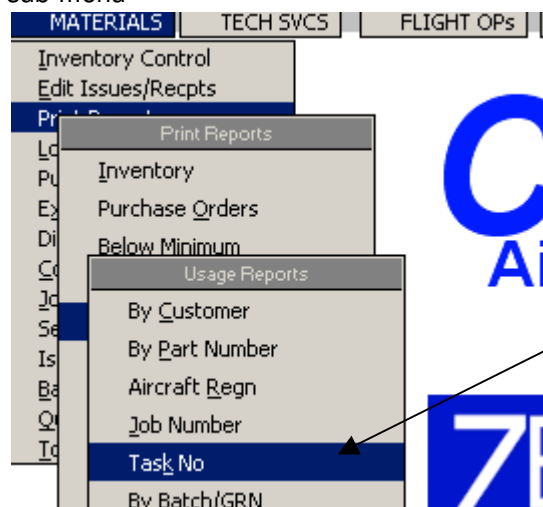
P/No **05-7211-K009404 - CLUTCH**   Total in Stock   0   Total on Order   0

PURCHASES				TRANSACTION	REF	SALES								Rotable
Order No	Supplier	Recvd	Price ea	Date	Batch No	Sales Ref	Acft	Customer	Sold	Cust Po	Freig_sell	Price ea		S/No. (if app
				06/04/19JD	RP	DEL21219		BANAVIA	1 LOAN					FA2003411
				06/04/19JD	AR	DEL21219	QUAR	BANAVIA	-1 LOAN					FA2003411
		0							0					

2. In addition from the Print Reports you can list the Status of all LOAN items using the following sub-menu

Enter the Date Range and type the word "LOAN" where prompted


```
JOB NO                                  Blank=ALL
Defect/Task No  LOAN                    Blank=ALL


   Show Prices        Certified List        Cancel
```

3. Listing will look like this

STOCK ISSUES
Rot & Con Job No=ALL, Task No=LOAN
Period FROM: 06/01/2019 TO: 06/04/2019

DATE	QTY	PART NUMBER	DESCRIPTION	A'CFT	GRN	SERIAL NO	COND	TOTA SAL

Job Number   **DEL 21219 - BANAVIA**

Task No.   **LOAN**

06/04/19	1	05-7211-K009404	CLUTCH			FA2003411	RP	0
06/04/19	-1	05-7211-K009404	CLUTCH	QUAR		FA2003411	AR	0
							SUB TOTAL	0

TOOLS AND EQUIPMENT ITEMS

By it's very nature there is no Part No in the Inventory to show History of movement as in movement to a Supplier or Customer. With Tools and Equipment your only mechanism of control is to move tools between O/Station locations. We therefore recommend you create a dummy O/Station location called "LOA" for LOAn. Thus you can move the Tool there, track for it's presence there and then move it back to yourself again to the appropriate O/Station code

1. Your transaction screen will look like this for OUTGOING. Note the Ref No showing "LOAN-OUT" with an Outstation Code of "LOA".
2.

   This will effectively move the Tool to this new Location under a LOA. Thus if you refer to the T/Qeq Screen, this is what you will see

3. When the Tools is returned, repeat the steps as for Rotable Items, but do NOT. use the same DELnnnnn number to make the Return. Instead create a new Delnnnn Note the Ref No showing "LOAN-RTN" with Orgn showing "LOA"
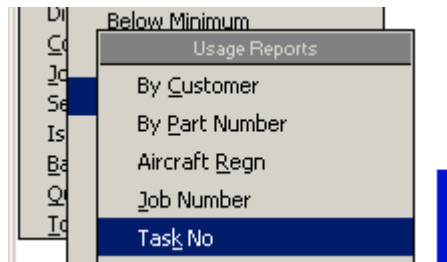

The Outstation code has been left blank in my example above to denote the Return is back to the Base, but it could have equally been correct to enter the actual O/station code being returned to

4. This effectively creates the movement of Tool with the option to print the Delivery Documents at each step

1. Use the Print Report by Task No to list the transactions

2. Using "LOAN" as the search string

3. The Report sample will lok like this

4. And the Tool Equipment screen will display the transactions as follows

-end-