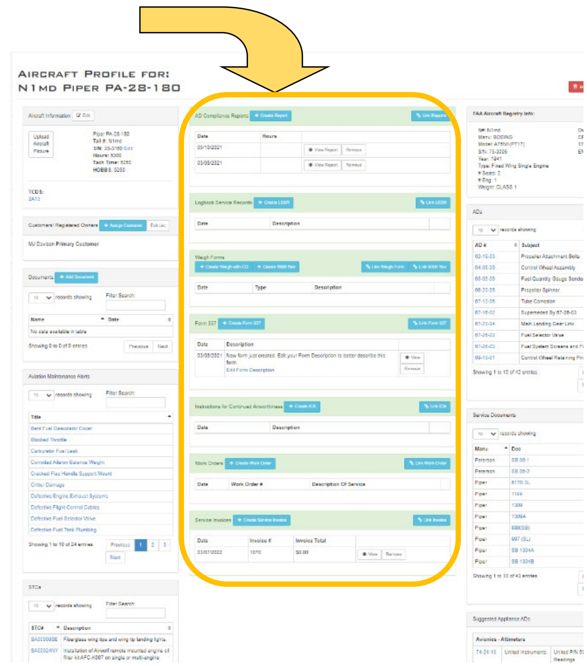
Quick Start Guides

Ready to build your first **Aircraft Profile**? Take a moment to scroll through the **Aircraft Profile** and **AD is Report** Quick Start Guide to get familiar:

Quick Start Guide for these sections



#1 Create an Aircraft Profile

1. From the Member Dashboard:

    a. Click on the second link on the left menu "**Aircraft Profiles**", then click the button "**Create New Aircraft Profile**", OR:

    b. Alternatively, from the Dashboard, click the button titled "**New Aircraft**" located on the right end of the Green Bar at the top center of the page.

2. Click the button titled "**Search by N#**".
3. Enter the aircraft identification "N#####".
4. Click "**Search**".
5. Verify the aircraft info showing below the "**Search**" button.
6. Select or click the **arrow** on the far right of the line showing the aircraft information.
7. The new page showing aircraft N# at the top has TWO buttons:
    a. First, click button "**Add to my Customers**" on the far right in the Owner information section.
    b. Next, click button "**Add to Aircraft Profile**" in the Aircraft Information section.

#2 Working with the Aircraft Profile

1. The **Aircraft Profile** is the place where you want to begin your work.
2. The **Aircraft Information** is in the upper left section. Here you can:

    1. Edit the N-Number and Times
    2. Edit the Serial Number
    3. Upload Aircraft Photo
    4. *Please Note: The FAA registration shows the owner that you added to your customer list is under **FAA Aircraft Registry Info**, in the right upper section. You now need to "Assign that person" to the "ownership".*
    5. Below the aircraft information section is the "**Customers/Registered Owners**" section with a blue button.

3. Select the blue button in the Customer/Owners Section to locate the owner within your "Customer File" and assign them to this aircraft. You will need to select the radial button on the far right of the owner's line and select the blue button above "**Add Customer to Aircraft Profile**".
4. This takes you back to the Aircraft Profile.
5. In the center section you should see several "green bars". These represent the various documents you will produce using our software, for this aircraft. They are:
6. AD Compliance Reports
7. Logbook Service Records
8. Weigh Forms
9. Form 337s
10. Instructions for Continued Airworthiness

11. Work Orders
12. Service Invoices
13. Click on the blue button labeled "+ Create Report" in the first green bar titled AD Compliance Reports. This will produce the beginning of the first AD Report.

#3 Working with the AD Compliance Report

1. The **AD Report** has a section at the top with a green bar header. This section also includes the Airframe info, Tail Number, S/N, and Hours fields that you can "edit". You can see how many ADs are found for the airframe, along with the TCD.
2. Below that first section is the Engine Info section. It has four links (in blue words) that allow you to add the Single/Left Engine, Single/Left Propeller, Right Engine and Right Propeller.
3. Choose the first link to add the single engine for a single engine aircraft.
4. Choose the second link to the right to add the Propeller for a single engine aircraft
5. Choose the Right Engine and Right Propeller for Twin Aircraft.
6. When the Engine is added, the ADs will be added to your report below the Airframe ADs
7. When the Propeller is added, those ADs will be added to your report below the Airframe ADs
8. Below the Engine Section, you should see the Appliance Information section.

    1. This section has three links, they are:
        a. **Select Appliances ADs** (for you to select specific Appliance ADs to your report)
        b. **Suggested Appliance ADs** (For you to select TCD Certified Appliances which already have ADs) and add them to your report if you have any of those items.
        c. **Manually Add Appliance Info**: Use this link to add and create an appliance list to the top of your AD Report (just above the orange, red and blue colored buttons). *For instance, this link allows you to list a TCD for a Garmin device that does not yet have an AD against it, but you know it is installed on this aircraft*.

9. Select the red button to eliminate Superseded ADs from your report. Note, you will not be able to reverse that action.

#4 Enter the compliance methods in the appropriate fields for each AD.

1. Notice the header bar for the AD Compliance section. Under the title S/N Guide column, you will find notes like: "Yes (for CD-1101)", or "All", or No (for CD-1101), or it may be blank. These refer to the applicability of the AD for this airframe.
2. The AD number shows in blue. Click on the number to read the AD
3. The Category "Airframe", "Engine", "Propeller", or "Appliance" will show next.
4. The AD Subject is next, followed by the Amendment number and then the Effective Date.
5. On the far right, we show you the AD is either "**Yes**", or "**Yes***" or blank.
    - **Yes** signifies recurring
    - **Yes*** signifies the AD is recurring and has a terminating option
    - Blank signifies the AD is not recurring.

#5 Creating a Logbook Service Record (LSSR) for SMALL LOGBOOKS

1. The LSSR is designed to allow for using an Avery 5168 or 8168 label format to use with the small format logbook. The label is 3.5” x 5”. It is also designed to fit the full 11” x 8.5” label sheets for the large logbooks or to make smaller labels that you can cut and paste.
2. Starting the LSSR from within the Aircraft Profile will bring aircraft information to the appropriate locations on the form.
3. Click “+Create LSSR” which will open a new page titled with “Logbook Service Record” and tell you which layout you are looking at (i.e., Avery 5168/8168 layout)
4. Verify all the information in the fields at the top, add what is missing, and then click into the main box located under “Maintenance Release:” Notice the blue ‘bubble’.
5. Click the blue bubble to see a saved library of “maintenance releases”. If none are showing, then you can create a new one by selecting the blue button “Add New Release”. Give it a title so you know what it is for (i.e., 100-hour Release), then click on “Save”.
6. You can click into the main (large) field of this LSSR view and type your Maintenance Release right there. Then it will save after you click the “Save” green button on the left.
7. Your signature line will be at the bottom of the label as seen.
8. Click on the “Print” blue button on the left.
9. A smaller window opens providing you with a choice of selecting which label position on the paper your LSSR will print. You have this choice so you can make use of all four labels on the sheet and not waste them. Imagine the label in landscape view to determine the layout. You may have to visualize this with the actual sheet of paper label in front of you.

#6 Creating a Logbook Service Record (LSSR) for LARGE LOGBOOKS

1. Starting the LSSR from within the Aircraft Profile will bring aircraft information to the appropriate locations on the form.
2. Click “**+Create LSSR**” which will open a new page titled with “**Logbook Service Record**” and show you the Avery 5168/8168 layout.
3. Select (click) on the blue button titled “**Full Page View**”. This will set up the full sheet label format for you to use.
4. Benefits to the large label include:
    1. Ability to add the company logo
    2. Ability to type much more information in the release with greater detail
    3. Rubber-banding of the signature line with the content including auto flow to a second page if required.
5. As above in Small Logbooks, verify all the information in the fields at the top, add what is missing, and then click into the main box located under “Maintenance Release:” *Notice the blue ‘bubble’.*
6. Click the blue bubble to see a saved library of “maintenance releases”. If none are showing, then you can create a new one by selecting the blue button “**Add New Release**”. Give it a title so you know what it is for (i.e., 100-hour Release), then click on “**Save**”.
7. Your signature line can flow/move with the text of the release length to eliminate a large space or gap after the information before the signature.
8. Click on the “Print” blue button on the left. A smaller window opens providing you with a choice “auto expand” as I described above, or “single page which will not auto expand.
9. Select “**Print**”.
10. The window will change to the PDF Print view. Click print from your browser using the browser print command. You can also “Save as” or print to PDF on your computer.
11. Feel free to email the LSSR to a customer in paper format.

#7 Creating a Weigh form (with CG or Revision)

1. From the 3rd Green Bar in the Aircraft Profile, select “**+ Create Weigh with CG**” form.
2. Be sure the date is correct for your form.
3. If you started this Form from the “Aircraft Profile” the aircraft information was forwarded to this form in the appropriate fields. If not, complete the empty fields now.
4. The Owner information should also have been imported automatically. Complete it now if not.

5. Complete the fields in the Method of Weighing as it relates to the equipment used section.
6. Enter the information into lines 1. thru 6 for the scale readings. Be sure to type numbers exactly, no spaces and do not use commas or decimals calculate the total weight and Moment
7. Enter the Moment/Weight and see results in CG and place any notes in the large field.
8. Enter your Gross Weight, Empty weight, and AC Useful load.
9. Sign and certify your form.

#7B. Creating a Weight & Balance Revision Form

1. From the 3rd Green Bar in the Aircraft Profile, select "+ Create S&B REV" form.
2. Verify the date field, aircraft information, owner information.
3. Enter the Weight and CG Range.
4. Enter the Data in the "As Received" section: Previous WB Date, Empty Weight, Useful Load, Empty Weight CG and Moment.
5. In section "Revision" enter the appropriate changes of equipment/component changes, along with the Weight, Arm and Moment. You will need to include a (Minus) "-" sign if appropriate. *For instance, the removal of a strobe light would be -1.70 lbs., and the removal of a Light/strobe might be -0.30 lbs. The addition of a LED Strobe/Nav Light Assembly might be 0.30 lbs.*
6. Verify the appropriate numbers in the totals section
7. Make any "Notes" you need.
8. Check the appropriate circle at the bottom as "As Calculated" or "As Weighed".

#8. Creating a form 337

1. From the 4th green bar down, in the Aircraft Profile, select "**+ Create Form 337**".
2. Verify all the appropriate information was prefilled in the form for section 1. Aircraft and 2. Owner. Correct or change the information if appropriate.
3. Skip to section 4 and select the "Repair" or "Alteration" box.
4. In section 5, enter the information into the fields.
5. In section 6, complete the information in A. and B and C. Then certify under section D.
6. In section 7, enter the appropriate information and select the proper items.
7. No move on to Section 8, is where you place the description. Use as much space as necessary but try not to use full line spacing for visuals as it counts as a minimum of 66 characters per blank line and will cause 2nd page overflow unless you accept that action. You cannot change the font size at this time.
8. If a second page is required, you will need to review the document using "Print" so show the PDF View of the form. Take note of where the form data is cut off from section 8. Highlight and copy the text from a point which is above the bottom of the page leaving about ½" of space in the field.
9. Paste that information into the "2nd page" field.
10. Review both pages, delete the duplicated information from page one and make sure you have no missing data.
11. You may have to work with this a few times to get the information correctly displayed on both pages. For today, this is the best option we have for completing lengthy forms.

#9. Create a Work order

1. From the Member Dashboard:
    1. While looking at the Aircraft Profile of the one you are working with, navigate down to the second from the bottom green bar called "Work Orders". Click on "+ Create Work Order". A new page will open stating "Work Order 1001", where the number is the next work order being created using auto numbering. It will remember the last number used
    2. Be sure the company name/address, Customer name/address and Aircraft Information has properly been brought into the form.
    3. NOTE: The field will turn yellow if you enter information and then click anywhere outside of that field. The yellow background is your reminder to "Save" your work.
    4. Click into the "Status" field in the upper right corner below the Work Order No.: field. Enter the status you choose to follow. For instance, you may wish to choose one of the following:
        - New – In progress – Pending Parts – Invoiced – Paid – Closed

- New – Pending Approval – Invoiced – Paid
- Or chose or create your own system.

1. The work order date can be updated or changed as you work with it to suite your needs.
2. Enter the “Description of Service/Problem:”. This would be the main reason the aircraft is in your shop. (i.e., Annual Inspection)
3. Click “Save” (the green button) to save your work and move forward.
4. The Discrepancy section is next in line downward.
5. Click on the “+ Add” to create a new (and others as well) Discrepancy. A new page shows allowing you to enter the Discrepancy, Corrective Action, Labor, Labor Rate, and Parts. You can just enter the Discrepancy at this time if you wish and add the others later.
6. Click “Save” (the green button)
7. Note: You can also add other documents if you look to the right of the page. This could include PO’s, Shipping/Packaging Slips, Photographs, etc., all related to this discrepancy.
8. Click “Save” again
9. Click “Return to Work Order” (it is a white button in the upper right corner of the screen
10. To enter information into the Discrepancy later, you should scroll to the appropriate one, then click the “View” button on the far-right side of that Discrepancy. You can enter and save the information after that.
11. When completed, the Work Order is set to accomplish one, or all of the following:
    - Print (shows you the PDF view of the Work Order you can print or save to your computer)
    - Print with the hours field
    - Convert to an Invoice
    - Convert to a Logbook Sticker (LSSR)

**NOTE: Be sure to update your Status when you need to keep in touch with the activity*

**NOTE: You can print the form using only some of the discrepancies if you wish. For instance, if some of them are done, others are waiting for parts. To do this follow these steps:*

- Click the orange “Select Discrepancies” button at the top. This takes you to a news page with a check box to the right of each one.
- Check the boxes of those you want to print
- Click on the proper button you wish to do: Print, Print with Hours, Convert to LSSR or Convert to Invoice.

1. In printing the work order, after the PDF view is there and you print the document, click your “Back Arrow” of the browser to go back to the “Select Discrepancies for Print or Conversion” page.
2. Do the other buttons if you need or click the “Return to Work Order” button in the upper right corner.
3. Click “Aircraft Profile” button in the upper right corner of the screen. You are now done with a work order. Your status field determines whether you need to address this document again. You can see this work order in the section listed in the aircraft profile.
4. See your work for this aircraft now while you are in the profile. You should see something saved under each section that you created a document.
5. NOTE: to delete a duplicate or erroneous work order created by accident, you can open the work order and click the Red Delete Button in the upper right menu of the work order.

#10. Create an invoice

1. From the Member Dashboard:
    100. Invoices are located under the last green bar of the Aircraft Profile. This section is where you will find your most recent invoices for this aircraft, and as with all other sections, you can show “all” or some grouping of lesser number of invoices. The default is 4, followed by options of 10, 50, or 100. (This is also available for all document sections in the profile)
    101. Creating an invoice can be done from this section by selecting “+ Create Service Invoice”. Alternatively, you can create an invoice from a Work Order by “Converting Work Order to Invoice”. Either way works or works well.
    102. Once you open the Invoice, you will see the title of the page as “Service Invoice 1###”, where 1001 will be your first invoice.
    103. From there, you have several sections on the page.
        1. First is the “Print” option section with buttons for various actions.
        2. The second section has two buttons:

- First is the ‘Edit Invoice” section allowing you to accomplish several tasks.
    1. Check Box at the top if you wish to make this a quote
    2. Invoice number can be edited to alter or further identify uniquely.
    3. Invoice Date,
    4. Invoice status offers you a place to identify the process of action: (i.e., New, Pending Payment, Billed, Paid, etc.)
    5. Invoice Terms
    6. The person writing the invoice.
    7. Sales Tax Rate (Percentage %)
    8. Shipping Total (with decimal)
    9. Fuel Costs (if you invoice for fuel)
    10. Check Box for Sales Tax Calculation
    11. And the Maintenance Release.
- The second button is the Invoice Payments.
    1. Click “+ Add Payment” in the upper right.
    2. Enter the “Payment Date”
    3. Enter the ‘Payment Amount”
    4. Enter the “Note” so you know what this was. (I.e., “Deposit”)
    5. Click “Save” the green button
    6. Verify the information shown in the table.
    7. Click “Return to Invoice” in the upper right.
- The third section is the Customer and Aircraft section. IF you began this from the Aircraft Profile, this information carried into place from the profile. Complete any open fields needed for the Aircraft Times.
- The fourth section is “Labor” followed by “Parts”, and “Misc.”, Each of these come forward from the Work Order if you created this invoice from the Work Order. IF you are just doing a one-off invoice, you will need to Add these components.’
- Click “Add Button on right of each of these sections to add a line-item description, quantity, cost and see how it totals.
- When you are finished verifying all your work, you can print the invoice according to the buttons at the top of the page in the Print Section.

YOU SHOULD HAVE NOW COMPLETED YOUR FIRST AIRCRAFT PROFILE, ADDED AND ASSIGNED THE OWNER TO THE AIRCRAFT AND CREATED A COMPLETE AIRCRAFT AD COMPLIANCE REPORT.

CONGRATULATIONS!

What would you like to see next? (We are working to provide more, stay tuned…)

- Work Orders
- Logbook Entries
- Invoices
- Parts Inventory
- 337s
- Weigh Forms
- ICA Forms

Let us know!