



**ShareMyToolbox**

Setup Documentation

and

User Guide

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# Welcome!

Thank you for selecting ShareMyToolbox for your field tool tracking and management needs!



“ANY DARN FOOL CAN MAKE SOMETHING COMPLEX; IT TAKES  
A GENIUS TO MAKE SOMETHING SIMPLE.” ALBERT EINSTEIN

We’ve worked hard to make SMTB simple, yet comprehensive – if we’ve failed in this regard, please let us know! Most functions should be intuitive enough that your field employees will need minimal instruction; however, we have created this user guide and well as videos, FAQs and other tools to make your user experience as seamless as possible.

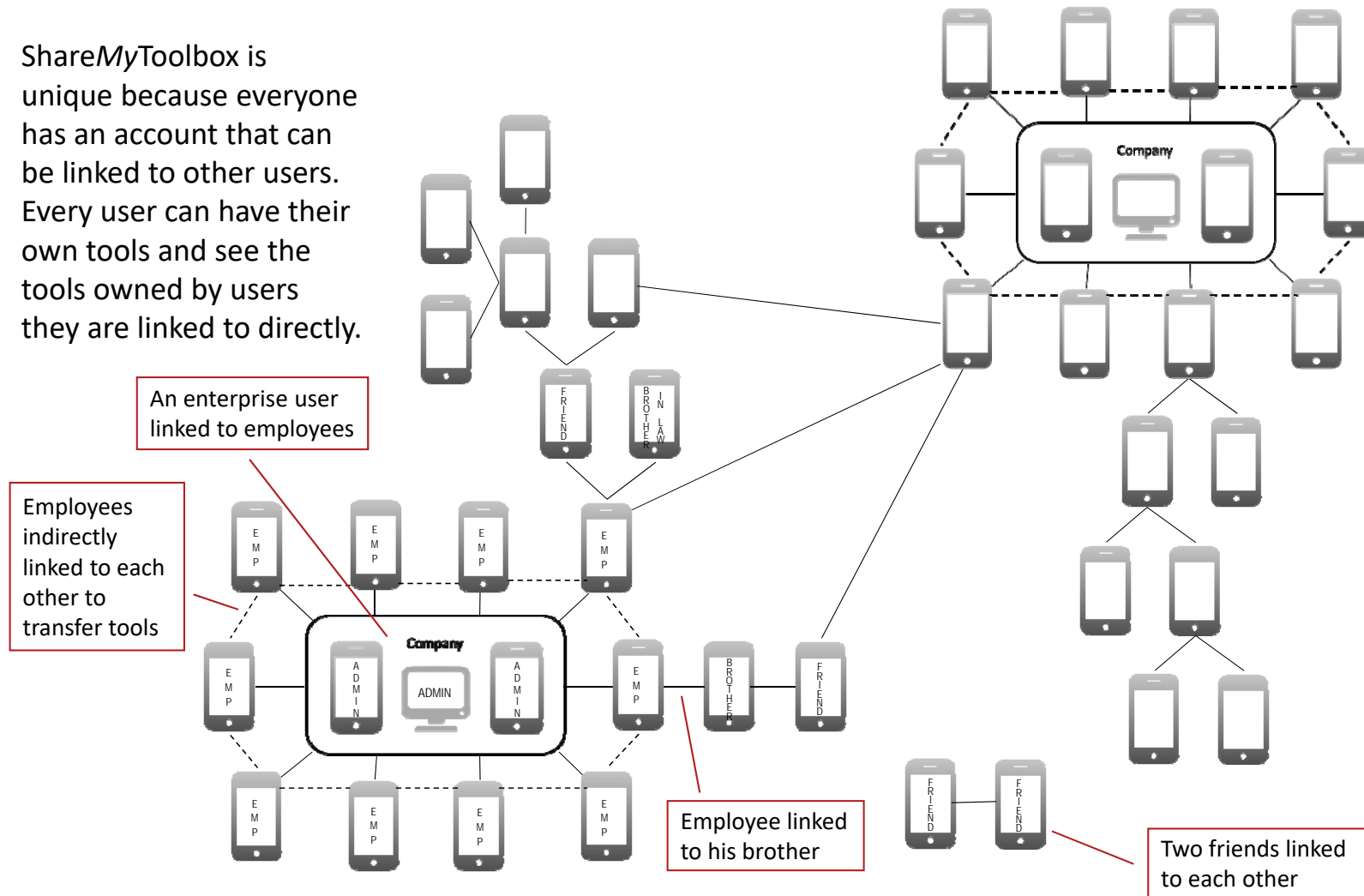
Before we jump into the detailed documentation, let’s make sure you understand some of the basic concepts. ShareMyToolbox is built upon a peer-to-peer sharing platform for both the free version and the paid enterprise version (although the enterprise version has enhanced sharing features that will be outlined later). In a nutshell, each user can have their own tool library and connect with other users. Whoever owns the tool controls what other users see, but in no case is information shared publicly. Only first tier connections can see your tools.



*SMTB is very much like making connections on **LinkedIn** or **facebook** , but in our case there is no public profile.*

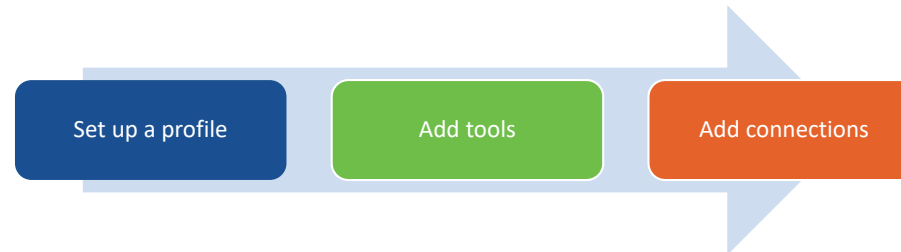
# Peer-to-peer sharing design

ShareMyToolbox is unique because everyone has an account that can be linked to other users. Every user can have their own tools and see the tools owned by users they are linked to directly.



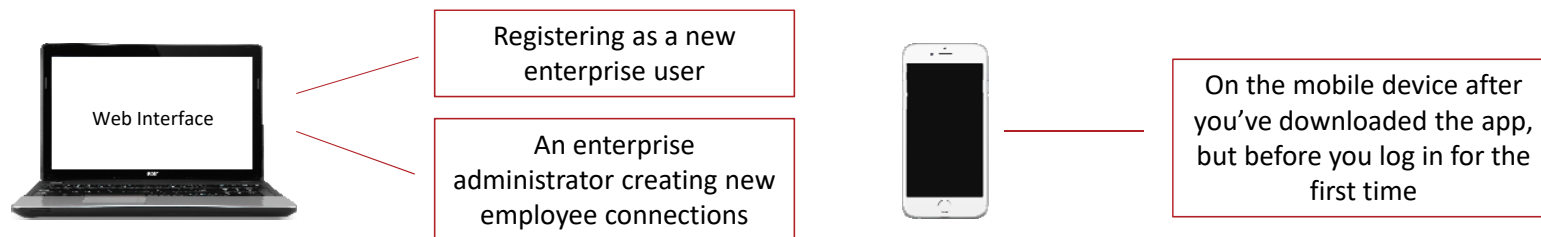
# Getting Started

In the pages that follow, we will walk you through three basic tasks you will need to perform to use ShareMyToolbox:



## Creating a user profile

A user profile can be created three different ways depending on whether you are using the free or enterprise version:



*All references to the web interface apply to the enterprise version only. Most mobile screenshots are from iOS, but Android differences are noted where appropriate.*



*If you are an enterprise administrator, your profile can be maintained via the web or the mobile device. Each method will be discussed in more detail in subsequent sections.*

## Web interface (enterprise only)

The screenshot displays the ShareMyToolbox web interface. At the top, there's a yellow header with the logo and a 'LOGIN' button. Below the header, a message says 'Choose your plan. Experience ShareMyToolbox for 5 users FREE for 14 days or purchase the plan that best suits your needs.' Two options are presented: 'Month to Month' and 'Annual Agreement', both for 5 users. A red box highlights the 'TRY FOR FREE' button under the 'Annual Agreement' option. Below this, a registration form titled 'What is the trial?' and 'To begin your trial' is shown. The form includes fields for Company, Select an industry, First Name, Last Name, Email Address, Password, and Confirm Password. A 'START TRIAL' button is at the bottom right. A list of features is provided on the left side of the trial form.

What is the trial?

You will have full access to ShareMyToolbox with:

5 Users for 14 Days

Including all the following features:

- Web interface for adding tools and/or importing via CSV file
- Web interface for adding employee connections
- Tool grid with inline editing, sorting, filtering and grouping records
- Export tool records to Excel
- Two user defined fields with attached date notifications
- Bar coding
- Group sharing: allow employees to transfer tools and record in the database without checking in
- Sharing enhancements (shared, not shared, designated)
- Rental tool tracking
- Multiple administrators

To begin your trial

Please enter the following information

Company

Select an industry

First Name

Last Name

Email Address

Password

Confirm Password

START TRIAL

ShareMyToolbox was designed as a “*mobile authentic*” application, meaning that we did NOT attempt to duplicate all the mobile functionality on the web interface. The web interface is primarily an administrative and reporting tool, whereas the mobile device is more oriented to workflow with a much richer user experience. Keep that in mind as you progress through the user documentation.

### Selecting your subscription

#### 14-day free trial

When you select Buy Now from the main web page you will be prompted for a Try for Free option.

Selecting this option will take you to the registration screen. When you complete the registration, you will have a 14-day trial period with a maximum of 5 connections. At the expiration of the trial, you can either convert to a paid subscription or revert to the free version. You will not lose any data that has been entered, but you will no longer have access to enterprise features.



*Your profile and tool database is tied to your registration email. If you will be a user as well as the administrator, we recommend you set up a corporate email used specifically for SMTB administration, such as [tooladmin@yourcompany.com](mailto:tooladmin@yourcompany.com).*

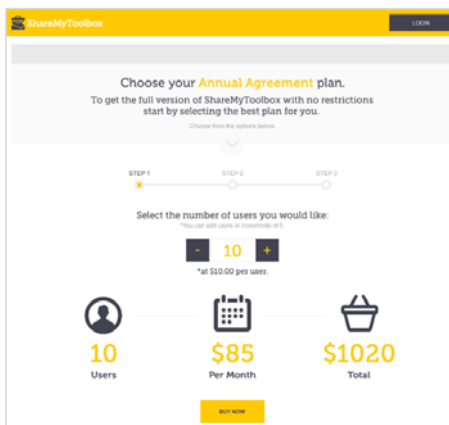
## Enterprise subscription



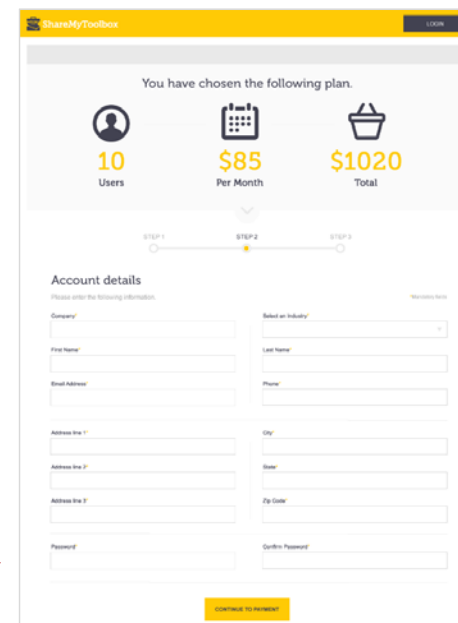
You have 2 options for paid plans, monthly and annually.



For more information concerning your registration profile, see the section titled *Editing your user profile*.

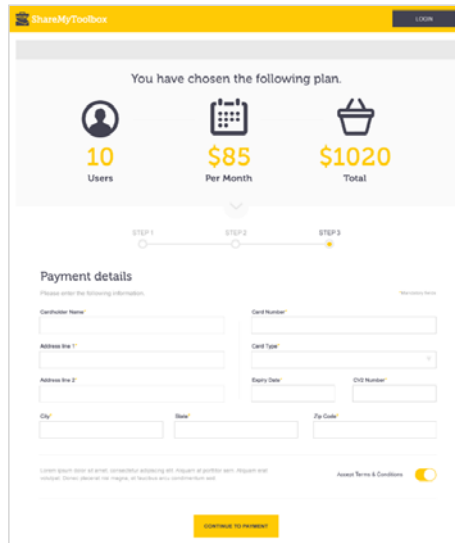


Selecting a plan will take you to Step 1 where you will select the number of connections (employees) for your company. The plan cost will display.






Clicking *Buy Now* will take you to Step 2 where you will register and create your profile. If you have already registered during a trial period or you were using the free version of SMTB, you will indicate that you are an existing user by entering your registration email.

## Enterprise subscription



ShareMyToolbox LOGIN

You have chosen the following plan.

 <b>10</b> Users	 <b>\$85</b> Per Month	 <b>\$1020</b> Total
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STEP 1 STEP 2 STEP 3

Payment details

Please enter the following information.

Cardholder Name\*

Address line 1\*

Address line 2\*

City\*  State\*  Zip Code\*

Card Number\*

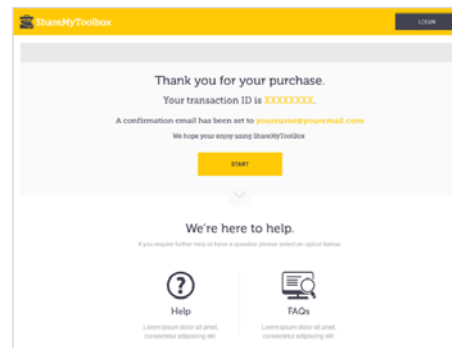
Card Type\*

Expiry Date\*  CVV Number\*

Learn more about our secure payment gateway through Authorized.Net, so your payment data is protected.

Accept Terms & Conditions ☐

[CONTINUE TO CHECKOUT](#)



ShareMyToolbox LOGIN

Thank you for your purchase.

Your transaction ID is **XXXXXXXXXX**.

A confirmation email has been sent to **youname@youremail.com**.

We hope you enjoy using ShareMyToolbox.

[START](#)

We're here to help.

If you require further help or have a question please select an option below.

[Help](#) [FAQs](#)

Learn more about our secure payment gateway through Authorized.Net, so your payment data is protected.

Click Proceed to Checkout and you will proceed to Step 3 to enter your payment information.

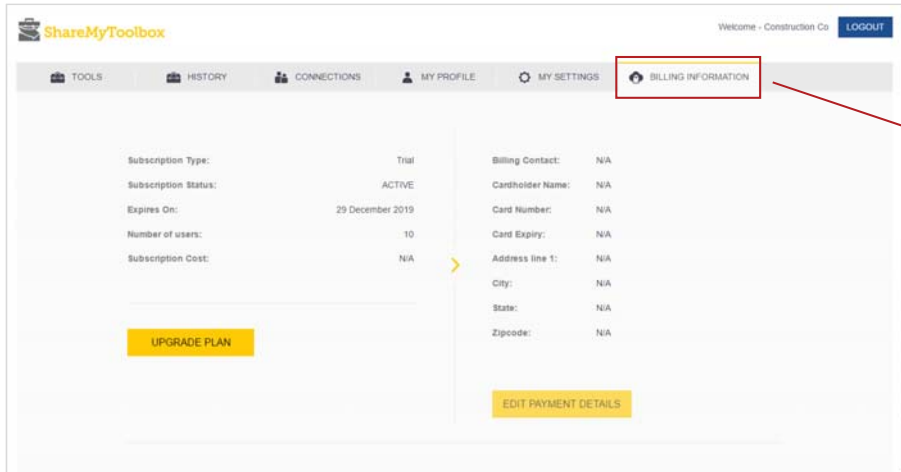
Click Continue to Payment and your credit card information will be authorized. If approved, you will receive a payment confirmation.



*We use a secure payment gateway through Authorized.Net, so your payment data is protected.*



## Changing your subscription



ShareMyToolbox

Welcome - Construction Co. [LOGOUT](#)

TOOLS HISTORY CONNECTIONS MY PROFILE MY SETTINGS **BILLING INFORMATION**

Subscription Type:	Trial	Billing Contact:	N/A
Subscription Status:	ACTIVE	Cardholder Name:	N/A
Expires On:	29 December 2019	Card Number:	N/A
Number of users:	10	Card Expiry:	N/A
Subscription Cost:	N/A	Address line 1:	N/A
		City:	N/A
		State:	N/A
		Zipcode:	N/A

[UPGRADE PLAN](#)

[EDIT PAYMENT DETAILS](#)

You can change your subscription at any time by signing on to the web interface and clicking on the *Billing Information* tab.

- Click on the Upgrade Plan button
- Select your subscription type and number of users
- Enter your credit card details

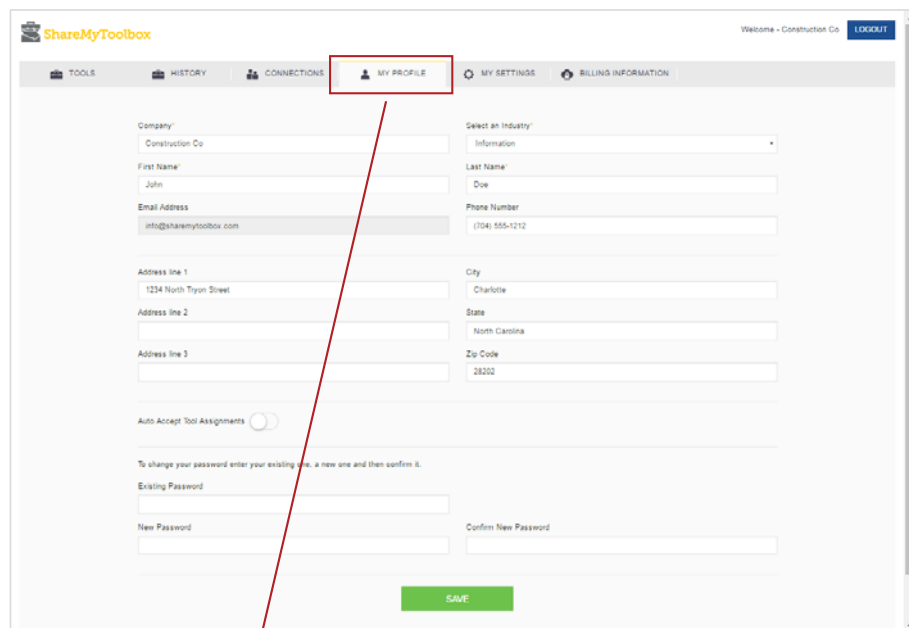
If you downgrade your plan, modifications will go into effect at the end of your current subscription period. Plan upgrades will take effect immediately and charges will be prorated according to your subscription type.

If you terminate your subscription, this will also go into effect at the end of your current subscription period. You will not lose any data, but you will revert to the free version and enterprise features will no longer be available.



*If a subscription is terminated, it's advisable that you export a copy of your tool database to Excel since reporting is not available on the free version.*

## Editing your user profile



ShareMyToolbox

Welcome - Construction Co. [LOGOUT](#)

TOOLS HISTORY CONNECTIONS **MY PROFILE** MY SETTINGS BILLING INFORMATION

Company: Construction Co. Select an Industry: Information

First Name: John Last Name: Doe

Email Address: info@sharemytoolbox.com Phone Number: (704) 555-1212

Address line 1: 1234 North Tryon Street City: Charlotte

Address line 2: State: North Carolina

Address line 3: Zip Code: 28202

Auto Accept Tool Assignments: ☐

To change your password enter your existing one, a new one and then confirm it.

Existing Password: New Password: Confirm New Password:

[SAVE](#)

When you log into the enterprise version of SMTB, select the *My Profile* tab.



*Your profile can also be modified on the mobile device.*

Company	For the enterprise version, company is required and this will display as the tool owner.
Select an industry	Select the appropriate government NAISC classification for your company. This is only used for SMTB demographic reporting.
Name	Enter your first and last name.
Email address	Your original registration email displays and cannot be changed.
Address	Enter your company address details.
Auto Accept Tool Assignments	If this option is selected, then you will not be required to answer tool notifications. <i>Note – this is not recommended.</i>
Password	If you wish to change your password, enter your existing password.

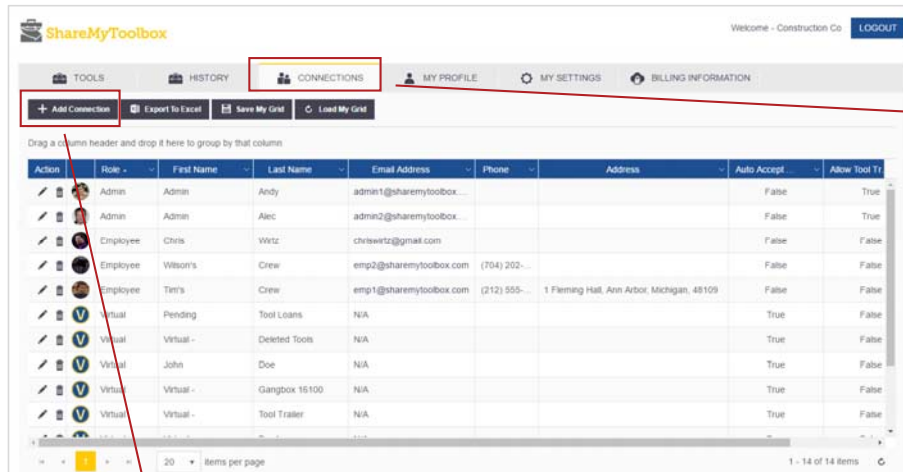
## Settings

The screenshot shows the 'My Settings' page in the ShareMyToolbox interface. The top navigation bar includes 'TOOLS', 'HISTORY', 'CONNECTIONS', 'MY PROFILE', 'MY SETTINGS' (highlighted), and 'BILLING INFORMATION'. The main content area includes a 'Require Terms' toggle, a text area for terms, 'Custom Field 1' and 'Custom Field 2' settings (each with a type dropdown, a label input, and an enabled toggle), a 'Receive Notifications' toggle, and a 'Number of Days Before Notification' input. A green 'SAVE' button is at the bottom.

When you log into the enterprise version of SMTB, select the *My Settings* tab.

Show Terms and Conditions	Select whether you wish to display T&Cs on the tool detail view. This does nothing other than act as reminder to your employees that you take your asset ownership seriously.
Terms Text Box	Enter the text you wish to display. It may be helpful that you reference a specific section from your employee manual regarding care of company assets.
Custom Field 1-2 Type	Custom fields can be defined as either a date, text or a web address (URL).
Custom Field 1-2 Label	Enter the description of the custom field.
Notifications	Enter the number of days in advance to send a notification. Note that notifications must be enabled on the mobile device. Notifications are available for due back date, warranty expiration, rental tool return and custom fields 1-2.

## Adding connections



ShareMyToolbox

Welcome - Construction Co. [LOGOUT](#)

[TOOLS](#) [HISTORY](#) **[CONNECTIONS](#)** [MY PROFILE](#) [MY SETTINGS](#) [BILLING INFORMATION](#)

[+ Add Connection](#) [Export to Excel](#) [Save My Grid](#) [Load My Grid](#)

Drag a column header and drop it here to group by that column:

Action	Role	First Name	Last Name	Email Address	Phone	Address	Auto Accept	Allow Tool Tr
	Admin	Admin	Andy	admin1@sharemytoolbox.com			False	True
	Admin	Admin	Alec	admin2@sharemytoolbox.com			False	True
	Employee	Chris	Wirtz	chriswirtz@gmail.com			False	False
	Employee	Wilson's	Crew	emp2@sharemytoolbox.com	(704) 202-...		False	False
	Employee	Tim's	Crew	emp1@sharemytoolbox.com	(212) 555-...	1 Fleming Hall, Ann Arbor, Michigan, 48109	False	False
	Virtual	Pending	Tool Loans	N/A			True	False
	Virtual	John	Doe	N/A			True	False
	Virtual	Virtual	Gangbox 16100	N/A			True	False
	Virtual	Virtual	Tool Trailer	N/A			True	False

Items per page: 20 1 - 14 of 14 Items

When you log into the enterprise version of SMTB, select the Connections tab. Your existing connections will display in a grid format. (See the *Using the Inquiry Grid* section for grid functionality).

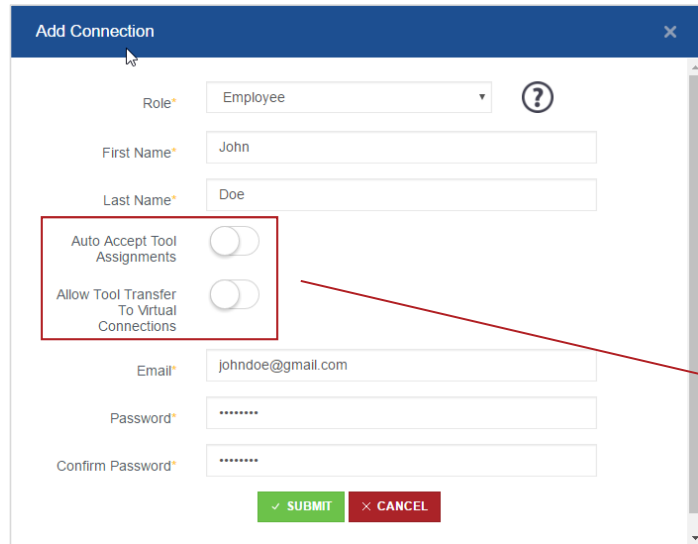
Select the Add Connection button to add new connections. Remember, connections will generally be employees for enterprise users.

There are 2 ways to add a connection via the web grid depending on whether a user exists in the ShareMyToolbox database:

**Does not exist** – an enterprise user can create one. An email will be sent to the user with logon instructions and a connection will be made.

**Does exist** – the user will be sent an invitation to connect which will need to be accepted before a connection is made.

## Adding connections – employee role



When creating a new employee connection, enter their name, email and give them a password.



*If the employee already exists in the ShareMyToolbox database, the password is ignored. The connection will display as pending until the invitation is accepted by the employee.*

Auto accept tool assignments – defaults to OFF. If ON, employee will NOT receive notifications for workflow processes.  
Allow tool transfer to virtual connections – defaults to OFF. If ON, employee can transfer tools to virtuals with no acceptance.

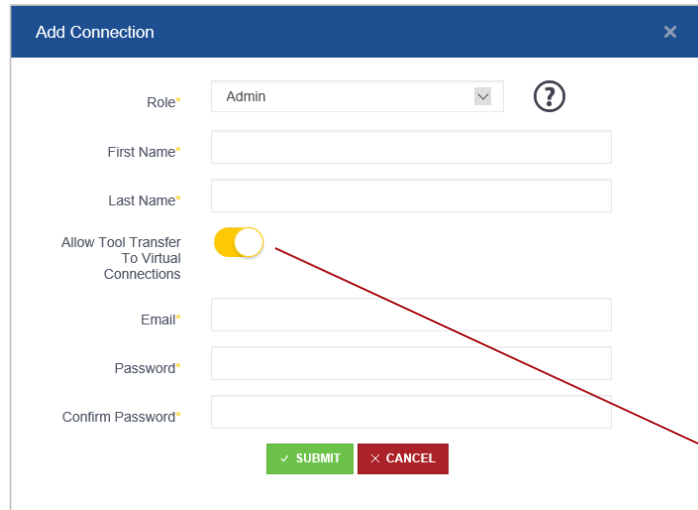


*We recommend leaving these settings to OFF.*

### Employee role characteristics:

- Can borrow tools from the company or transfer tools to other company connections.
- Cannot add/edit/delete company tools.
- Can add/edit/delete unlimited personal tools.
- Cannot add enterprise-specific fields on personal tools, i.e., rental, barcode or user-defined fields.
- Can create up to four personal connections, one of which will be the company.
- Receives notifications for enterprise-related workflows.
- Cannot access the web interface.

## Adding connections – administrator role



The screenshot shows the 'Add Connection' form with the following fields and controls:

- Role:** A dropdown menu set to 'Admin' with a help icon.
- First Name:** A text input field.
- Last Name:** A text input field.
- Allow Tool Transfer To Virtual Connections:** A toggle switch currently turned 'ON'.
- Email:** A text input field.
- Password:** A text input field.
- Confirm Password:** A text input field.
- Buttons:** A green 'SUBMIT' button and a red 'CANCEL' button.

When creating a new administrator connection, enter their name, email and give them a password.



*DO NOT change a connection from employee role to admin unless the following steps are carefully followed:*

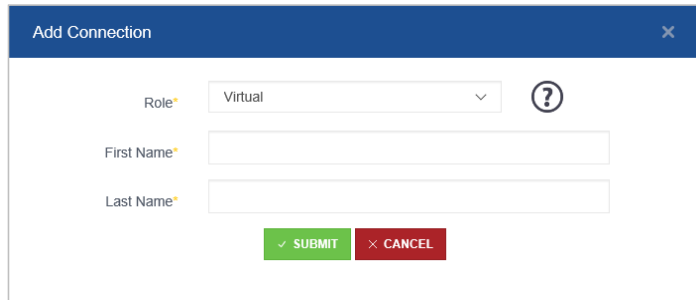
1. *Employee must delete any personal tools.*
2. *Log off the mobile device.*
3. *Change roll to admin.*
4. *Log back onto mobile device.*

Allow tool transfer to virtual connections – defaults to ON and cannot be changed.

### Administrator role characteristics:

- Can add/edit/delete company tools.
- Can perform any workflow process.
- Tools created will be company tools.
- Cannot create personal tools.
- Will receive and can answer company notifications unless “Auto Accept Tool Assignments” is selected for the primary company administrator.
- Can access all web interface functionality except subscription details on the *Billing* tab.

## Adding connections – virtual role



The screenshot shows a dialog box titled "Add Connection". It has a "Role" dropdown menu currently set to "Virtual". Below it are two text input fields for "First Name" and "Last Name". At the bottom of the dialog are two buttons: a green "SUBMIT" button and a red "CANCEL" button. A red line points from the "Virtual" role selection to a text box on the right.

When creating a virtual connection, the only required fields are first and last name.



*Virtual connections do not count against your paid user count.*

### Virtual role characteristics:

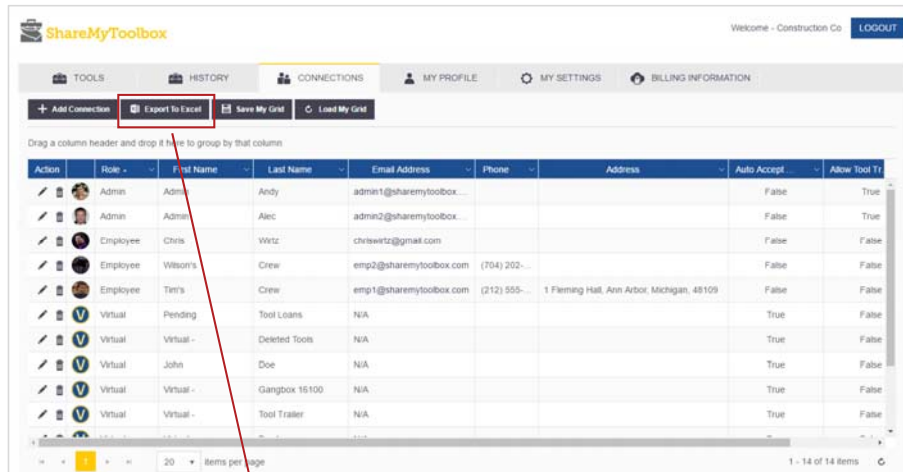
- Used for any tool assignment without accountability.
- Tool assignments are automatically accepted.



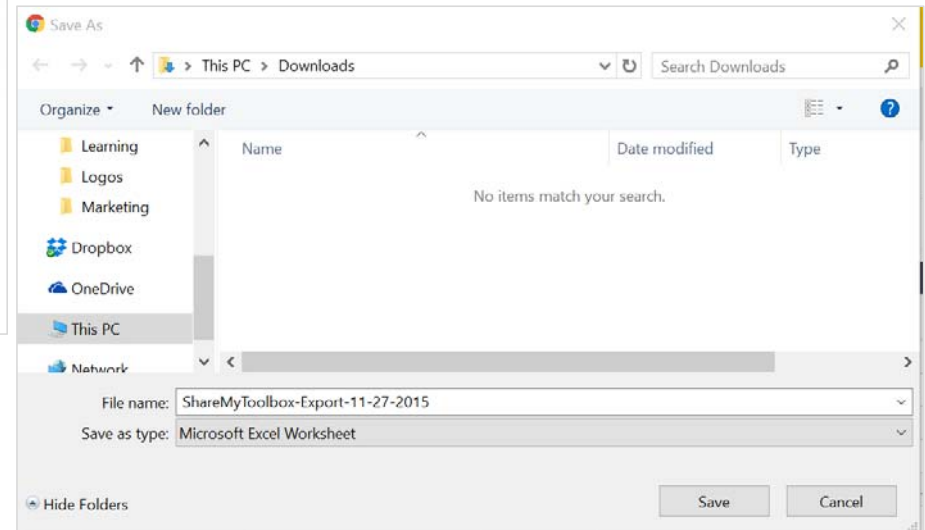
*The virtual role gives you a tremendous amount of flexibility in managing your ShareMyToolbox database. Create virtual connections for any situation that requires tracking an assigned tool where there is no one to accept it. Here are some creative examples:*

- Initial implementation – setup all employees as virtual and assign tools. When system is completely implemented, mass transfer tools from virtual roles to employees.
- All employees as virtual – allows you to purchase the minimum subscription and assign tools to unlimited employees, however, you lose field visibility and accountability. You will have a tool inventory list though.
- Repair status – set up a virtual called “Repair Bin” to track tools needing maintenance. Using a due back date can let employees know an estimated repair completion.
- Deleted tools – tools removed from service can be transferred to a “Deleted Tool” virtual connection. At year-end they can be physically removed after reporting for tax purposes.
- Trucks – it’s a best practice to assign tools to an employee, but you may want to use a virtual connection for tolls permanently assigned to a truck.

## Exporting connections to Excel



Select the Export to Excel button to export your connections.



A dialog box will display to save to an Excel file.



## Adding tools

When you log into the enterprise version of SMTB, select the *Tools* tab. Click the Add Tool button to add a new tool.

Tool Details

Tool Title \*1.25 HP MAX TORQUE COMPACT F

DescriptionThe 450 includes Motor, Standard Base, Wrench, Instruction Manuals.

ManufacturerPorter Cable

Model Number450

Serial Number-

Barcode0016000513693

CategoryRouters

Purchase Date8/24/2016

Purchase Price\$119.00

Warranty Date08/18/2016

Sharing Status

Rental Tool

Calibration07/14/2016

Location

Owners Manual Uri

Website Urlhttp://www.portercable.com/Products.

MANAGE IMAGES

SAVECANCEL

ShareMyToolbox

Welcome - Construction Co

LOGOUT

TOOLS

HISTORY

CONNECTIONS

MY PROFILE

MY SETTINGS

BILLING INFORMATION

Add Tool

Import Tools

Export To Excel

Mass Transfer

Save My Grid

Load My Grid

Drag a column header and drop it here to group by that column

Action	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Bar
		1.25 HP MAX TORQUE C...	The 450 includes Motor, Standard Base, ...	Porter Cable	450	-	001600
		1.25HP MAX TORQUE CO...	The 450PK includes Motor, Standard Bas...	Porter Cable	450PK		
		1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill to L...	Skil	6335-01		009661
		1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill m...	Skil	6445	XB4567	A00000
		1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for hig...	Bosch	1013VSR		
		1/2" High-Speed Drill	The 1033VSR is a 1/2-inch pistol-grip, hea...	Bosch	1033VSR	-	29746
		1/2" High-Torque Drill	1/2 in. pistol grip heavy duty high ampera...	Bosch	1034VSR	GGG-876	28938
		1/2" Keyed VSR Mid Handl...	The DEWALT DWD216G 1/2" Keyed VSR ...	DeWalt	DWD216G	656534G-32	
		1/2" VSR 2 SPEED HAMM...	The PC70THD includes PC70THD, Chuck,	Porter Cable	PC70THD		
Total Count: 220							

1 - 20 of 220 items

The tool detail record will display to add the tool. Each of the tool record fields are described on the next page.



*The only required field on the tool record is Tool Title.*



*The tool record must be created before images can be added. After you save the tool record, edit the tool to add images.*



*Categories and manufacturers can be selected from the dropdown list or you can type a new one in the field and it will be created.*

## Tool record fields

Tool Title	Short tool description and the only required field to set up a tool.
Description	Long Description. This field will hold far more text than displayed here.
Manufacturer	Click on the <i>Manufacturer</i> field to display a default list of 120 of the top tool manufacturers. Type a company in the field for a “best fit” search and click on the manufacturer to select. If the manufacturer does not exist on the default list, you can tab to add it. It’s helpful to complete this field since it’s displayed on summary tool views and aids in tool identification.
Model Number	Enter the tool <i>Model Number</i> . This will default to all caps for letters. It’s helpful to complete this field since it’s displayed on summary tool views and aids in tool identification.
Barcode	Clicking on the <i>Barcode</i> field will activate the camera on your mobile device. Scan the tool barcode and the resulting number will populate the field. Duplicates will not be allowed.
Product Links	Cut and paste links to the tool manufacturer’s <i>Website URL</i> and/or <i>Owner’s Manual URL</i> .
Tool Category	Click on the <i>Category</i> field and a <i>Category View</i> will display. Click the category for this tool record or type in a category description and tap to create a new category.
Purchase Information	Enter the <i>Purchase Date</i> , <i>Purchase Price</i> and <i>Warranty Date</i> . Entering a warranty date will trigger a notification when the warranty is about to expire.
Serial Number	Enter the <i>Serial Number</i> for the tool. This field will force capital letters.
Sharing Status	The <i>Sharing Status</i> can be set to <i>Shared</i> , <i>Not Shared</i> or <i>Group</i> (future). If <i>Not Shared</i> is selected, the tool will not display to connections. If <i>Group</i> is selected, the tool will only display to connections that are a member of a group.
Tool Rental	If the <i>Rental Tool</i> field is enabled, additional fields will appear. Enter the <i>Rental Start Date</i> , <i>Rental Return Date</i> , <i>Rental Rate</i> and <i>Rental Period</i> . Entering a return date will trigger a notification when the tool is due back.
Custom Field 1 and 2	The label can be changed via <i>Settings</i> on the web interface. The field can be designated as a date, URL or text. If a date is used, notifications can be enabled.
Manage Images	Add up to 6 pictures of your tools. You must create the tool record before this button will be enabled.



Create a folder to contain images of common tools for later reuse.

## Editing and deleting tools

To **edit** a tool, click on the pencil icon in the action column on the grid. When you are done click *Save Changes*.

To **copy** a tool, click on the double paper icon in the action column on the grid. The copied tool will default to (copy) in its title. All pictures and fields will be copied except barcode and serial number. When you are done click *Save Changes*.

To **delete** a tool record, click on the trash can icon in the action column on the grid. You will be asked to confirm the deletion.

Welcome - Construction Co

LOGOUT

TOOLS

HISTORY

CONNECTIONS

MY PROFILE

MY SETTINGS

BILLING INFORMATION

+ Add Tool

Import Tools

Export To Excel

Mass Transfer

Save My Grid

Load My Grid

Drag a column header and drop it here to group by that column

Action	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Barco	
			1.25 HP MAX TORQUE C...	The 450 includes Motor, Standard Base, W...	Porter Cable	450	-	00160005
			1.25HP MAX TORQUE CO...	The 450PK includes Motor, Standard Base,...	Porter Cable	450PK	-	1001
			1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill is th...	Skil	6335-01		00966197
			1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill mo...	Skil	6445	XB4567	A000001
			1/2 In. Hammer Drill (Copy)	This powerful 7 amp 1/2 in. corded drill mo...	Skil	6445	-	
			1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for high ...	Bosch	1013VSR		
			1/2" High-Speed Drill	The 1033VSR is a 1/2-inch pistol-grip, hea...	Bosch	1033VSR	-	29746
			1/2" High-Torque Drill	1/2 in. pistol grip heavy duty high amperag...	Bosch	1034VSR	GGG-876	28938
			1/2" Keyed VSR Mid Handl...	The DEWALT DWD216G 1/2" Keyed VSR ...	DeWalt	DWD216G	656534G-32	

Total Count: 209

1 2 3 4 5 6 7 8 9 10 ... 20 items per page

1 - 20 of 209 items

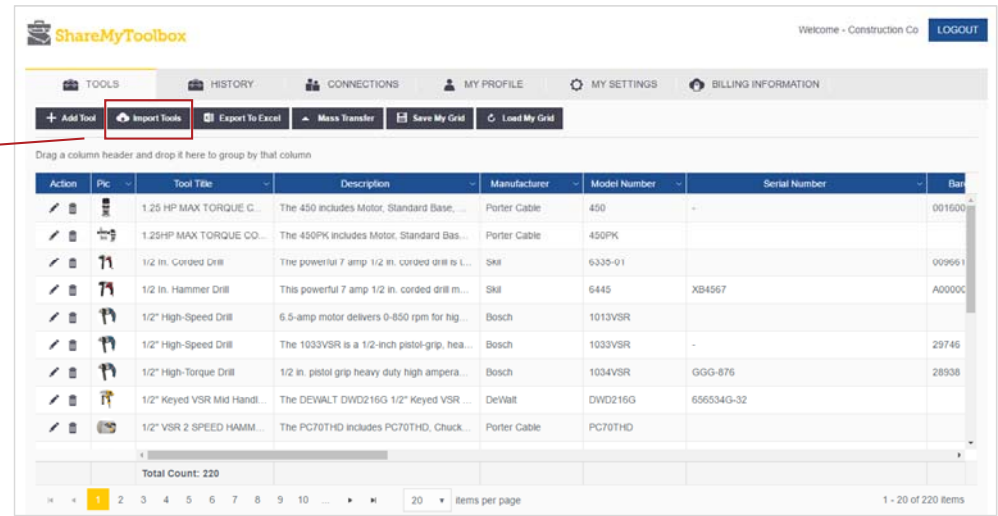


*A tool cannot be deleted if it is loaned out. Check in the tool and then delete it.*

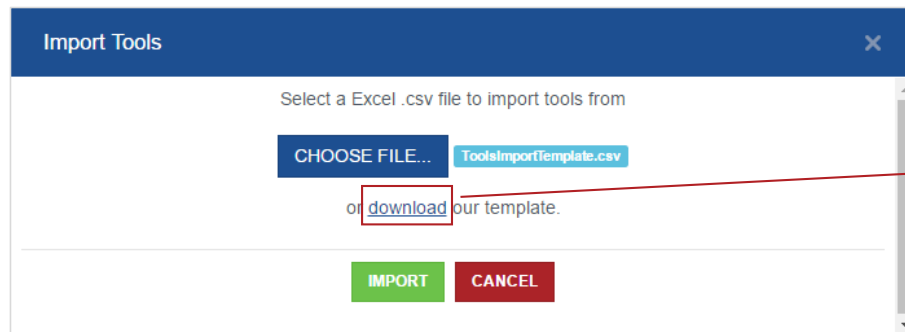
## Importing tools

When you log into the enterprise version of SMTB, select the Tools tab and click the *Import Tools* button.

A dialog box will display.



Action	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Bar
		1.25 HP MAX TORQUE C...	The 450 includes Motor, Standard Base, ...	Porter Cable	450	-	001600
		1.25HP MAX TORQUE CO...	The 450PK includes Motor, Standard Bas...	Porter Cable	450PK		
		1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill to L...	Skil	6335-01		009561
		1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill m...	Skil	6445	XB4567	A00000
		1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for hig...	Bosch	1013VSR		
		1/2" High-Speed Drill	The 1033VSR is a 1/2-inch pistol-grip, hea...	Bosch	1033VSR	-	29746
		1/2" High-Torque Drill	1/2 in. pistol grip heavy duty high ampera...	Bosch	1034VSR	GGG-876	28938
		1/2" Keyed VSR Mid Handl...	The DEWALT DWD216G 1/2" Keyed VSR ...	DeWalt	DWD216G	656534G-32	
		1/2" VSR 2 SPEED HAMM...	The PC70THD includes PC70THD, Chuck...	Porter Cable	PC70THD		



Import Tools

Select a Excel .csv file to import tools from

CHOOSE FILE... ToolsImportTemplate.csv

or [download](#) our template.

IMPORT CANCEL

Click on the template download for the required CSV format.

Enter your tools to import on the template. The example line can be deleted. It's there for reference only so that you can see the correct data format. *Do not delete the column headings.*



The template contains all the tool record fields except photos. Photos will need to be entered via the mobile device or through the web interface.

Title	Description	Manufacturer	Model Number	Website URL	Owner's Name	Category	Purchase Date	Purchase Price	Warranty	Sharing Status	Serial Number
Example Tool	Example Description	Example Manufacturer	ABC123	http://www.example.com	Example Owner	Example Category	1/1/2015	100	1/1/2018	TRUE	123ABC

After you have completed and saved the template with your tool records, click on *Choose File*. A dialog box will display and you will select your CSV file you saved in the previous step. Click on *Import* and the process will display the number of tools successfully imported as well as any errors.



When importing data via the web interface, it's helpful to sign on to the mobile device and watch as available tools increase on the dashboard to see import progress.



For a quicker initial setup, have your field employees fill out the import template with their tool inventory. Import individually each employee's tools, loan them and have them accept. If done individually, their tools will be the only ones on the available list thus simplifying the process. When all employee tools are imported, finish by importing the remaining unassigned tools.

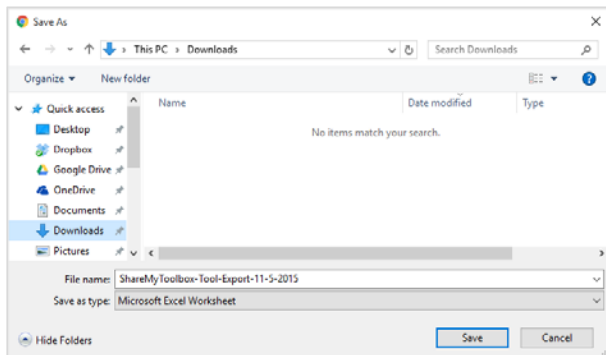
## Exporting tools to Excel

A lot of simple reporting can be accomplished by using the filter/grouping options on the tool grid. For more detailed reporting and graphing you may wish to export your data to Excel.



*Before you start, note that only displayed tool records will export, so select all records to display on a page and apply any relevant filters.*

Click on the Export to Excel button on the *Tools* tab and a dialog box will appear.



Action	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Bar
		1.25 HP MAX TORQUE C...	The 450 includes Motor, Standard Base, ...	Porter Cable	450	-	001600
		1.25HP MAX TORQUE CO...	The 450PK includes Motor, Standard Bas...	Porter Cable	450PK		
		1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill to l...	Skil	6335-01		009961
		1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill m...	Skil	6445	XS4567	A00000
		1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for hig...	Bosch	1013VSR		29746
		1/2" High-Speed Drill	The 1033VSR is a 1/2-inch pistol-grip, hea...	Bosch	1033VSR	-	28938
		1/2" High-Torque Drill	1/2 in. pistol grip heavy duty high ampera...	Bosch	1034VSR	GGG-876	
		1/2" Keyed VSR Mid Handl...	The DEWALT DWD216G 1/2" Keyed VSR ...	DeWalt	DWD216G	656534G-32	
		1/2" VSR 2 SPEED HAMM...	The PC70THD includes PC70THD, Chuck...	Porter Cable	PC70THD		
Total Count: 220							

Open the exported CSV file and save in an Excel format. From here you can use all the available Excel tools to filter and graph your tool library.



Open the exported CSV file and save in an Excel format. From here you can use all the available Excel tools to filter and graph your tool library.

Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Barcode	Category	Status	Loaned To
https://sh 1.25 HP MAX TORQUE COMPACT	The 450 includes Motor, Standard Base, Wrench, Porter Cable			450		0016000513693	Routers	Loaned	Wilson's Crew
https://sh 1.25HP MAX TORQUE COMPACT	The 450PK includes Motor, Standard Base, Plunge, Porter Cable			450PK	-	1001	Routers	Available	
https://sh 1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill is the ide			6335-01		0096619756803	Drills	Loaned	Tim's Crew
https://sh 1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill model 6			6445	XB4567	A000001	Drills	Loaned	Tim's Crew
https://sh 1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for high speed		Bosch	1013VSR			Drills	Loaned	Tim's Crew
https://sh 1/2" High-Speed Drill	The 1033VSR is a 1/2-inch pistol-grip, heavy-duty		Bosch	1033VSR	-	29746	Drills	Loaned	Wilson's Crew
https://sh 1/2" High-Torque Drill	1/2 in. pistol grip heavy duty high amperage pro		Bosch	1034VSR	GGG-876	28938	Drills	Loaned	Tim's Crew
https://sh 1/2" Keyed VSR Mid Handle Drill	The DEWALT DWD216G 1/2" Keyed VSR Mid Hanc		DeWalt	DWD216G	656534G-32		Drills	Loaned	Chris Wirtz
https://sh 1/2" VSR 2 SPEED HAMMERDRILL	The PC70THD includes PC70THD, Chuck key and P		Porter Cable	PC70THD			Drills	Loaned	Virtual - Truck
https://sh 1/4 SHEET ORBITAL FINISH SAND	The 380 includes Sander, Operating manual, Pap		Porter Cable	380			Sanders	Loaned	Virtual - Repair
https://sh 1/4 Sheet Palm Sander	This pressure control random orbit sander is the		Skill	7292-02			Sanders	Loaned	Repair Bin
https://sh 10 in. Compound Miter Saw with	Compact yet powerful, this 10 in. miter saw is an		Skill	3316			Benchtop	Loaned	Wilson's Crew
https://sh 10 in. Compound Miter Saw with	Compact yet powerful, this 10 in. miter saw is an		Skill	3317			Benchtop	Loaned	Tim's Crew
https://sh 10 in. Drill Press with Laser	Make precise holes and accurately drill with this		Skill	3320			Benchtop	Loaned	Wilson's Crew
https://sh 10 in. Table Saw with Fixed Stan	For bigger bolder projects, Skill table saws provid		Skill	3310	-	13905	Benchtop	Loaned	Virtual - Repair
https://sh 10 in. Table Saw with Folding Sta	For better results with bigger, bolder projects, S		Skill	3410			Benchtop	Loaned	Wilson's Crew
https://sh 10" Dual-Bevel Glide Miter Saw	The innovation responsible for both the unique		Bosch	CM10GD			Miter Saws	Loaned	Virtual - Tool Trailer
https://sh 10" JOBSITE TABLE SAW	Includes table saw, rolling stand, 10-in blade		Porter Cable	PCB222TS		123456789	Table Saws	Loaned	Wilson's Crew
https://sh 10" Wet Tile and Stone Saw	The TC10 is equipped with expanded rear and six		Bosch	TC10	GGG-565		Tile Saws	Unavailable	



*If you group your tools before exporting, the groups will be applied to your Excel sheet.*

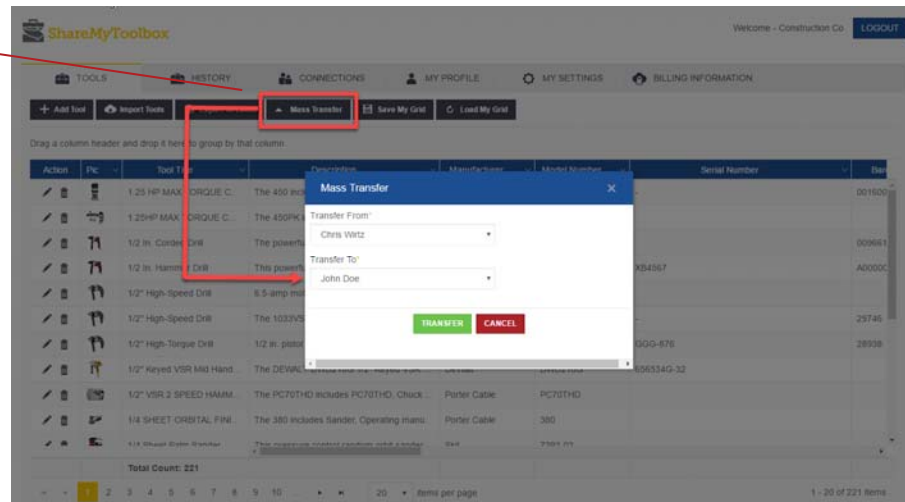
## Workflow – mass transfer

ShareMyToolbox is designed as a mobile-authentic application, therefore most workflow is directed to the mobile device. There is one process, however, that is more appropriate for the web interface.

The mass transfer feature is used when you would like to transfer all the tools from one employee to another, for example, when an employee is terminated and a new employee assumes his tools.

To use this feature, log into the enterprise version of SMTB and select the *Tools* tab. Click on the *Mass Transfer* button.

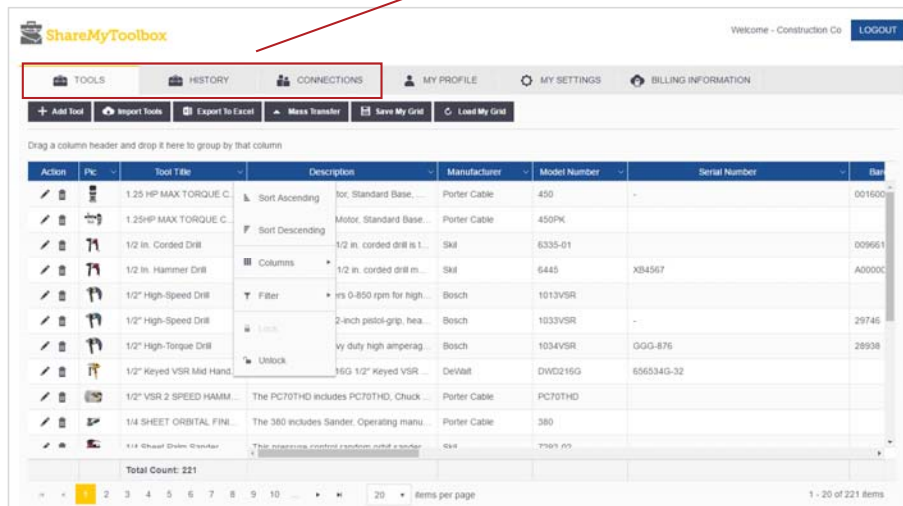
Select the employee to transfer from and the employee that will receive the tools. Click the *Transfer* button. A dialog box will appear to confirm the transaction. A notification will be sent to both parties that the transfer occurred and the tool history will be updated with a mass transfer record.





## Using the inquiry grid

The inquiry grid is a powerful tool for viewing and manipulating your tool catalog. Grids can be accessed by selecting either the *Tools*, *History* or *Connections* tabs.



If you group your tools, select ALL for the number of tools to display so that groups do not cross pages.

Grid features include the ability to:

Sort	Click on a column or the column menu dropdown and select sort ascending or sort descending.
Filter	Clicking on the column menu dropdown and select filter. Click on the filter button to start the filter or the clear button to remove a filter. Refreshing your browser screen will also clear filters.
Hide columns	Click on the column menu dropdown and select column. Uncheck the column description checkboxes to hide columns.
(Un)Lock columns	Click on the column menu dropdown and select (un)lock.
Group	Drag one or more columns to the grouping bar. For example, you may wish to group by manufacturer and/or tool category. A selection can be removed by clicking on the X on the group description on the grouping bar. To collapse a group on the grid, click on the triangle.
Moving columns	Move a column by dragging to a new location.
Sizing columns	Resize a column by dragging the column edge.
Record display	Select the number of tools to display or show all.
Save/Load grid	Click the save grid button to save your grid settings. Click the load grid button to restore your previously saved settings.

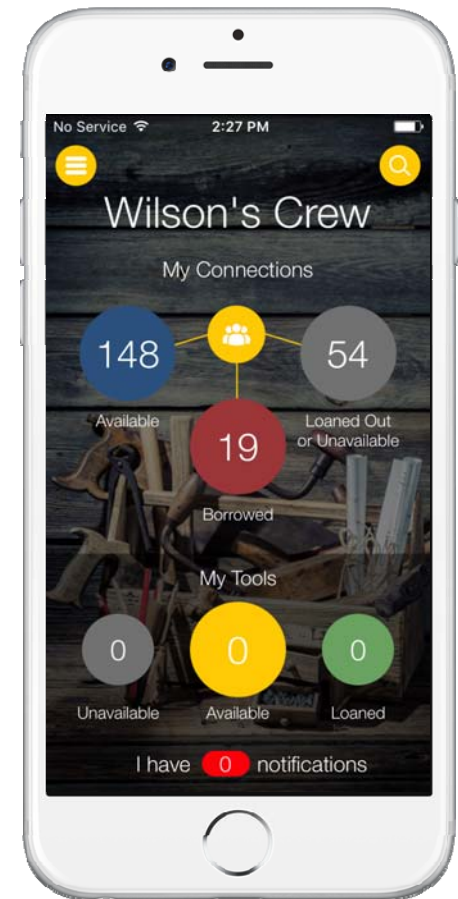
# Mobile

Unless you are an enterprise user, your only access to ShareMyToolbox will be on a mobile device and certain functionality will not be available. Enterprise-only features will be clearly denoted in the pages that follow.

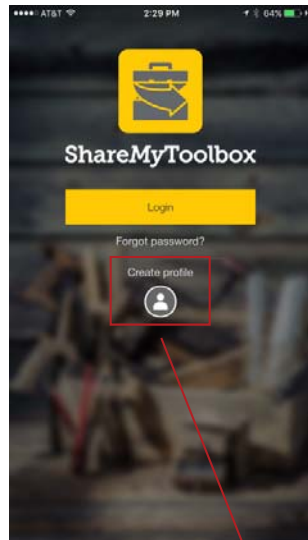
In accordance with our philosophy of designing ShareMyToolbox as a “mobile authentic” application, the mobile component was designed with a richer user experience than the web interface, which was intended for administrative and reporting functions. The mobile device was optimized for workflow and other field interaction.

We worked hard to make the interface simple and intuitive for field personnel that have no patience for corporate applications. As an added benefit to drive adoption, employees are able to track their personal tools and make connections with friends and family. If an employee leaves the company, they are removed as a company connection, but maintain personal connections for tool sharing. This is all possible by our unique [peer-to-peer design](#).

ShareMyToolbox was written “natively” for iOS and Android, meaning we did not use hybrid programming tools. This eliminates overhead in our application and a layer for possible bugs. It also allows us to optimize the user experience since we are not limited by hybrid development tools.



## Creating a user profile



Enter your name, email and password on the *Basic* tab (iOS). Additional profile information is on the *Extended* tab which we encourage you to complete. Click *Register* (or the *save icon* for Android) at the top of the screen to save your profile and return to the log in screen. You can now log in with your new profile. An automated email will be sent welcoming you to ShareMyToolbox.

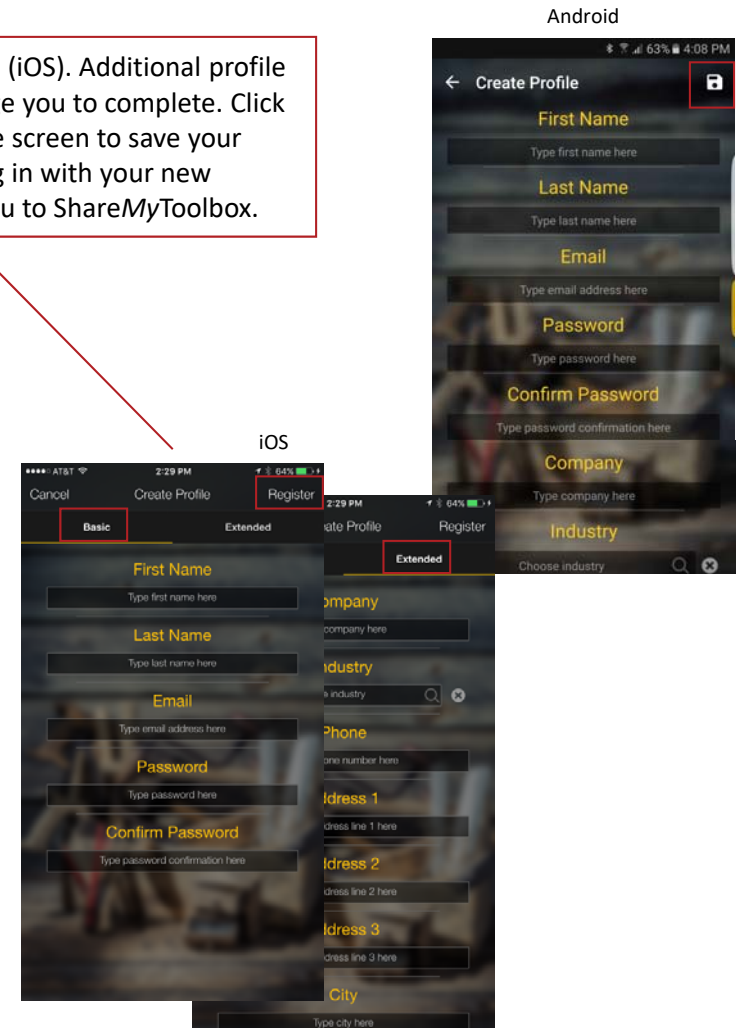


See *Editing Your User Profile* for a complete description of all fields.

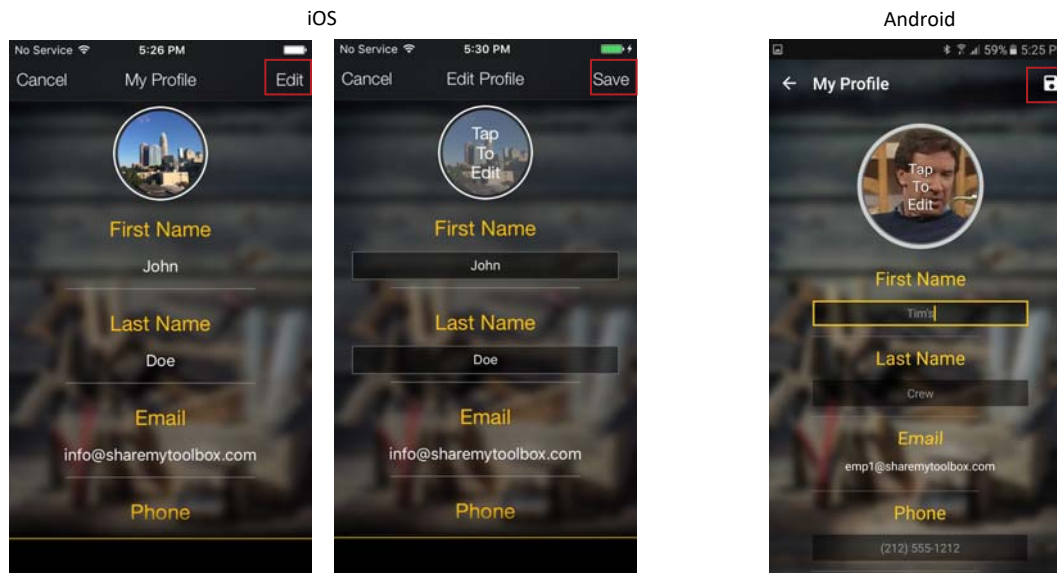
If you are a new user on ShareMyToolbox, after you download the application and click on the SMTB menu icon, you will see a log in screen. Click on the *create profile icon* and you will go to the *Create Profile* screen.



If your user profile was created by an enterprise web administrator, it does not need to be created again on the mobile device. You would have received an email with log in instructions.



## Editing your user profile



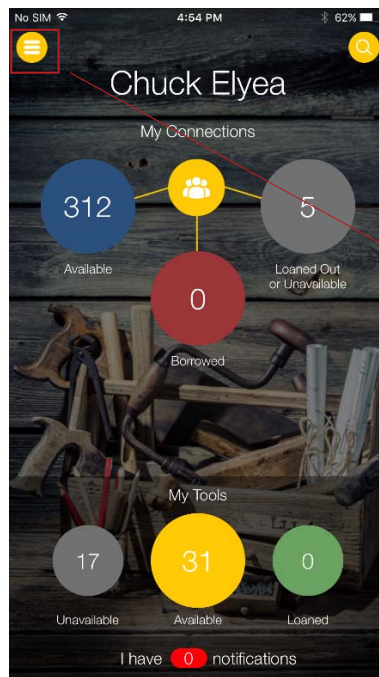
From the main menu, click on *Profile*. Your current profile will display. Click *Edit* on the top right of the screen. Click on the fields you wish to edit – most are self-explanatory. Click *Save* (or the *save* icon for Android) to save your changes.

### Profile Fields:

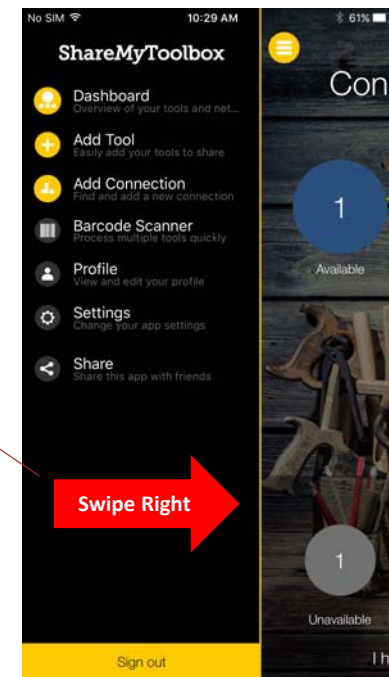
- Photo – Your photograph or company logo
- First Name
- Last Name
- Email – Cannot be changed currently. You can either set up a new account if you need it changed, or let us know and we can change it for you.
- Phone – We suggest you enter this so that your connections can contact you easily.
- Address
- Company
  - Industry – not required, but facilitates demographic reporting for us.
  - Company Name – This is NOT your employer. Only enter a company if it is the tool owner. This will be confusing if you work for ABC Construction (and are connected) and ABC also enters tools. Your tools and ABC's tools will both show up as owned by the same entity.
  - Display company as tool owner – Just in case someone puts in a company name, we created this option so that we would know to use *First/Last Name* as the tool owner or *Company* and it would force the user to consider this.
- Password

## Menu

All major options can be easily accessed from the ShareMyToolbox menu. Navigation is made simple by enabling one click to almost anywhere within the app.

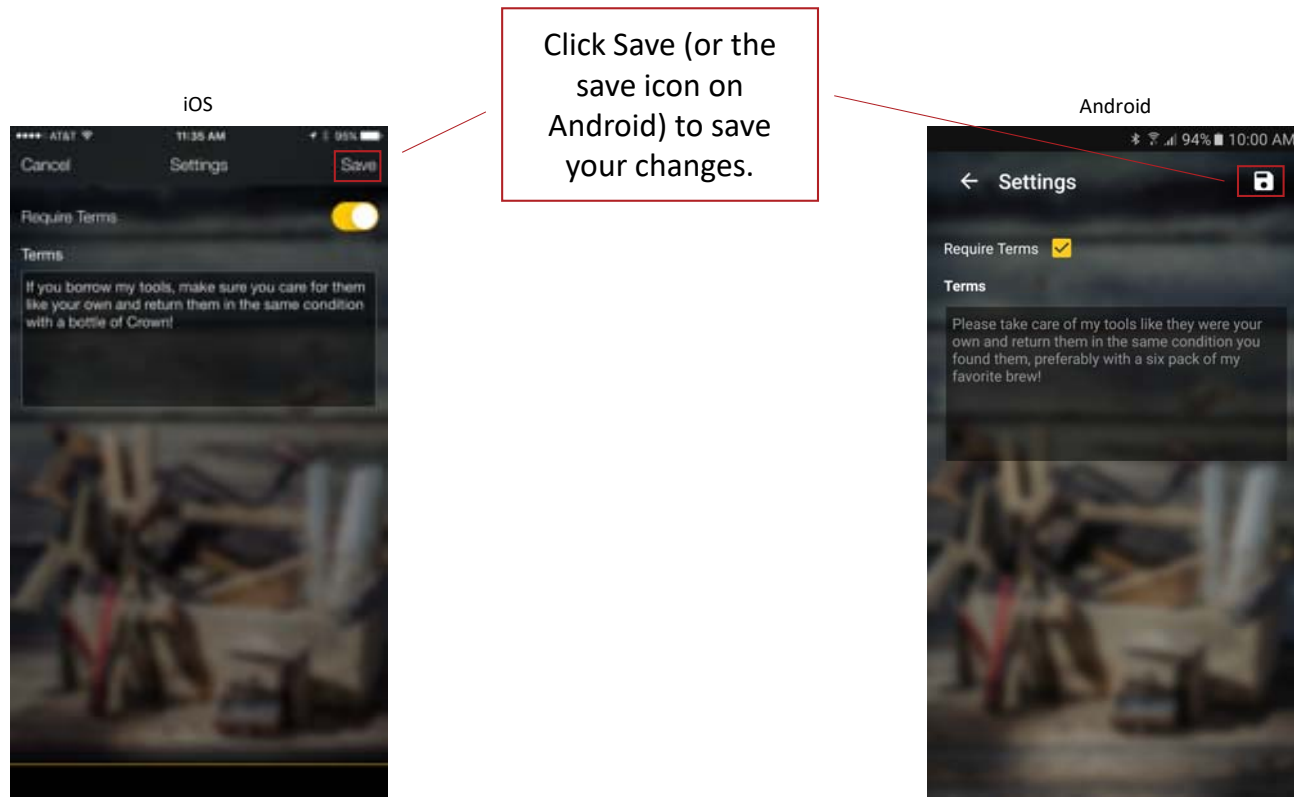


Either click on the menu icon or swipe to the right on most screens.





## Settings

Settings on the mobile device are limited to loan terms. Select Settings from the main menu. If you wish to display loan terms with the tool, slide the bar to require terms. If you select to require terms, you will enter terms text. This does not require acknowledgement by a borrower, but it does let them know you may be semi-serious about taking care of your assets.

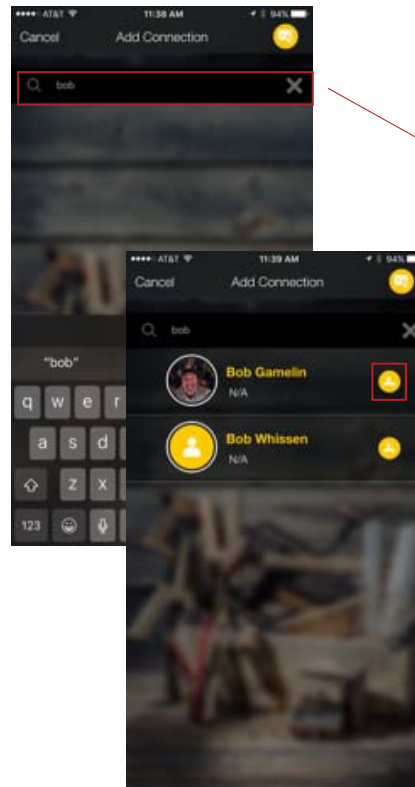
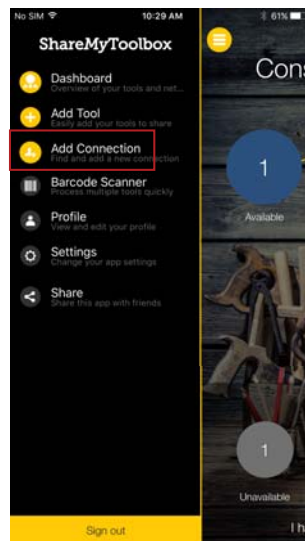




## Adding connections – existing users

ShareMyToolbox is like  facebook or  LinkedIn in that you create a profile and connect to other people or “friends,” however, *nothing in our app is public*. No one sees your tools except those you physically connect with through adding a connection.

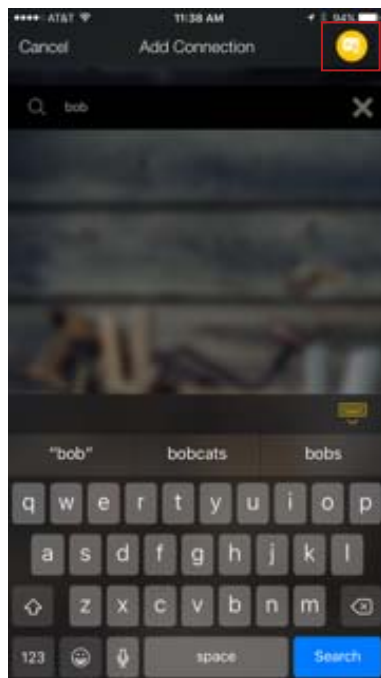
To add a connection, go to the main menu and click *Add Connection*. You can connect with existing ShareMyToolbox users or invite new ones to download the app and then connect.



To search for **existing users**, type all or part of a name in the search field and click *Search* on the keyboard. It's helpful if the connection entered a picture or city/state in their profile, otherwise, it may be difficult to determine which Bob Smith you would like to connect with! To connect, click the *add* icon to the right of their name.

*ShareMyToolbox will notify the other user that you would like to connect. If they accept, you will receive a notification and a connection will be established. You will then be able to browse the tools they marked sharable.*

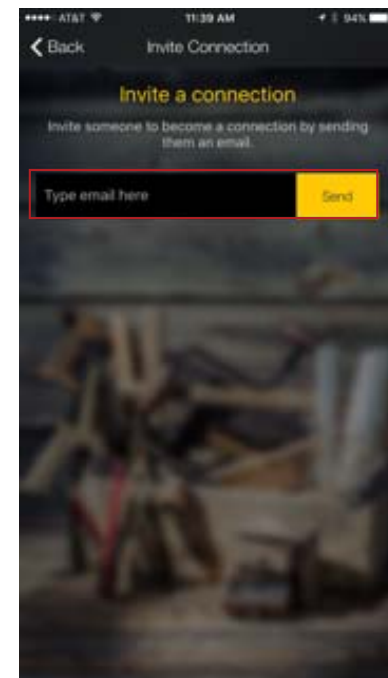
## Adding connections – new users



If a potential connection has NOT established a profile in ShareMyToolbox, click the *invite* icon in the top right of the *Add Connection* screen and type their email address.



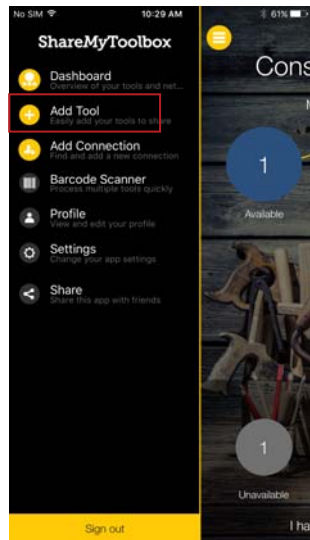
*ShareMyToolbox will generate an email invitation with your mobile device's default email provider which you will be able to edit before sending.*





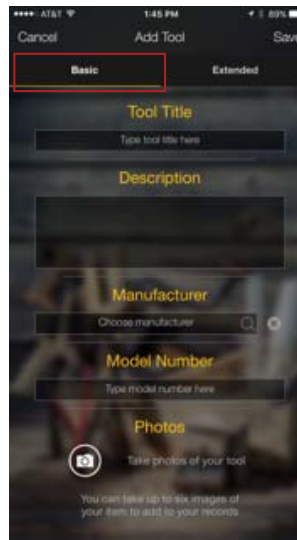
## Adding tools

From the main menu click *Add Tool*.

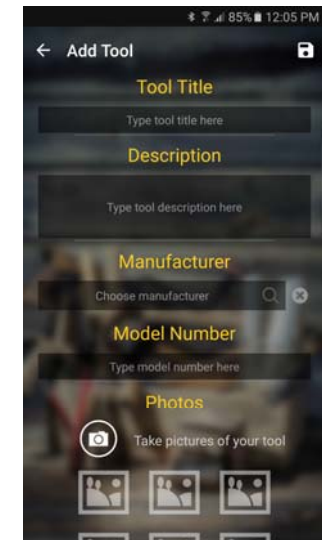
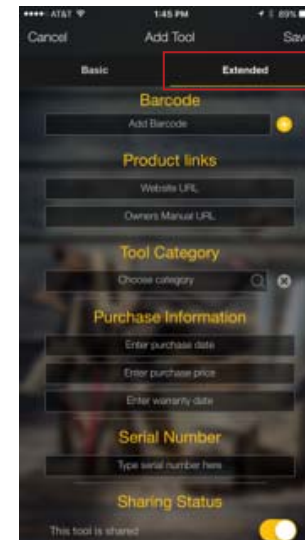


The fields that display are determined whether you are an enterprise user or are using the free version. You must be an enterprise administrator to set up a tool on an enterprise account. There are 2 tabs on the tool record for iOS: *Basic* and *Extended*. On Android, tabs are not used.

iOS



Android



Press *Save* (or the *save icon* on Android) to save your changes. Depending on your internet connection, the new tool will appear on your available tool list immediately. If not, you can pull down on the tool view to refresh the screen.

## Tool fields

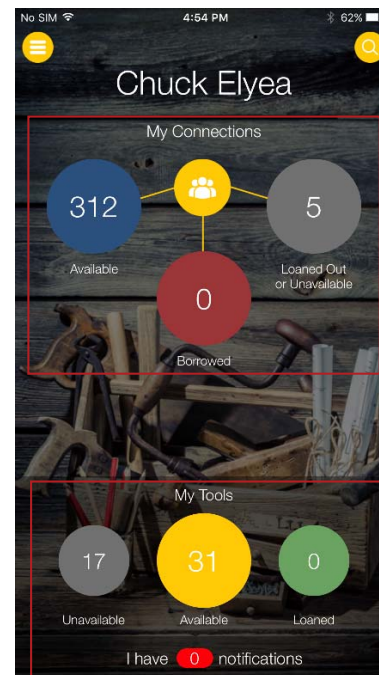
Tool Title	Short tool description and the only required field to set up a tool.
Description	Long Description. This field will hold far more text than displayed here.
Manufacturer	Click on the Manufacturer field to display a default list of 100+ of the top tool manufacturers. Type a company in the search box for a “best fit” search and click on the manufacturer to select. If the manufacturer does not exist on the default list, you can click to add it. It’s helpful to complete this field since it’s displayed on summary tool views and aids in tool identification.
Model Number	Enter the tool Model Number. This will default to all caps for letters. It’s helpful to complete this field since it’s displayed on summary tool views and aids in tool identification.
Photos	Click the Camera icon to add up to 6 pictures of your tools. You will be able to take new pictures or select existing pictures from your photo library. If you are an enterprise user, pictures will be slightly higher resolution and you will be able to use the “pinch to zoom” feature of your mobile device.
Barcode*	Clicking on the <i>Barcode</i> field will activate the camera on your mobile device. Scan the tool barcode and the resulting number will populate the field. Duplicates will not be allowed.
Product Links	Cut and paste links to the tool manufacturer’s <i>Website URL</i> and/or <i>Owner’s Manual URL</i> .
Tool Category	Click on the <i>Category</i> field and a <i>Category View</i> will display. Click the category for this tool record or type in a category description and tap to create a new category.
Purchase Information	Enter the <i>Purchase Date</i> , <i>Purchase Price</i> and <i>Warranty Date</i> . Entering a warranty date will trigger a notification when the warranty is about to expire.
Serial Number	Enter the <i>Serial Number</i> for the tool. This field will force capital letters.
Sharing Status	The <i>Sharing Status</i> can be set to <i>Shared</i> or <i>Not Shared</i> . If <i>Not Shared</i> is selected, the tool will not display to connections.
Tool Rental Fields*	Enter the <i>Rental Start Date</i> , <i>Rental Return Date</i> , <i>Rental Rate</i> and <i>Rental Period</i> . Entering a return date will trigger a notification when the tool is due back.
Custom Fields*	The labels can be changed via <i>Settings</i> on the web interface for 2 custom fields. The fields can be designated as a date, URL or text. If a date is used, notifications can be enabled.

\* *Enterprise Only*

## Using the mobile dashboard

The startup screen for ShareMyToolbox is the mobile dashboard, a quick summary of and efficient way to access your tool database.

At the top of the dashboard you will see a summary of *My Connections* tool library. Clicking on any of the status buttons will take you to a tool view of items filtered by the respective status. Note that “unavailable” refers to tools your connections have loaned out. Borrowed tools will not appear unless you have borrowed from one of your connections. To access your connection list, click on *connection icon*.



The dashboard and tool icons are color coded according to status as follows:

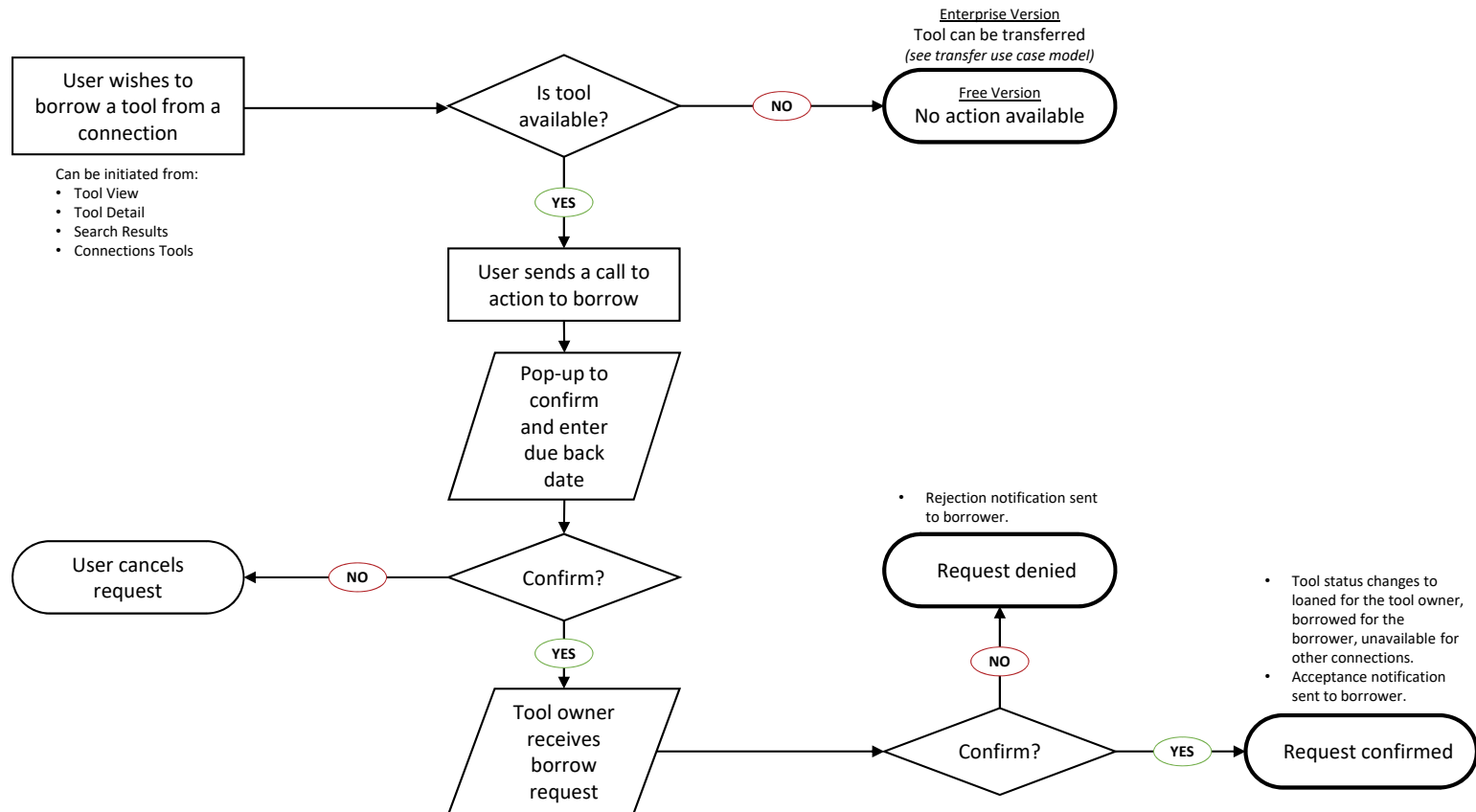
- Your available tools
- Connections' available tools
- Your loaned tools
- Your borrowed tools
- Your tools marked non-shared; your connections' tools loaned; any tool marked unavailable

*Hopefully, the color coding will be intuitive after a period of using ShareMyToolbox!*

The bottom of the dashboard summarizes *My (your) Tools* and any active notifications. Clicking will take you to the notification view where you can respond.

## Workflow – borrowing a tool

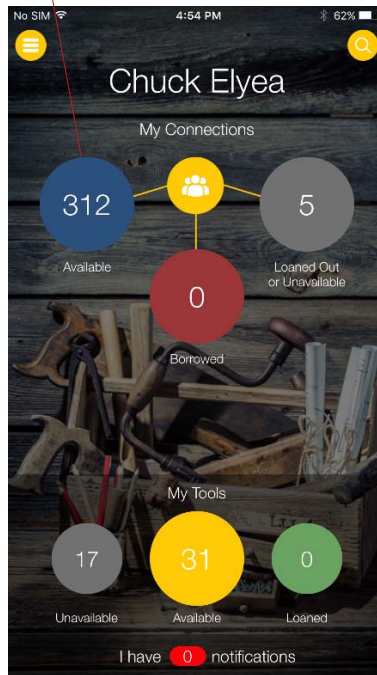
The borrow workflow is illustrated below.



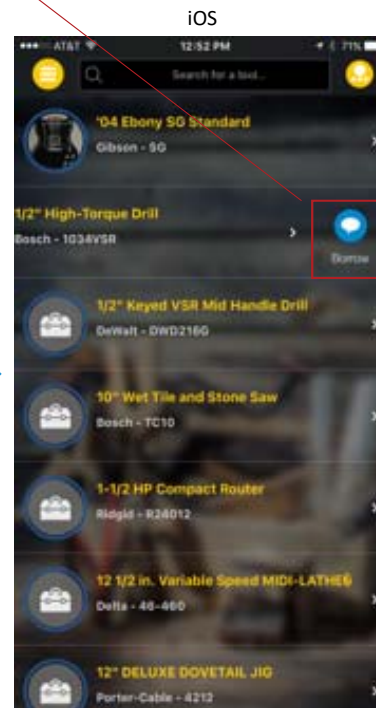
## Workflow – borrowing a tool on the summary tool view

Borrowing a tool can be initiated from the *summary* or *detail* tool views.

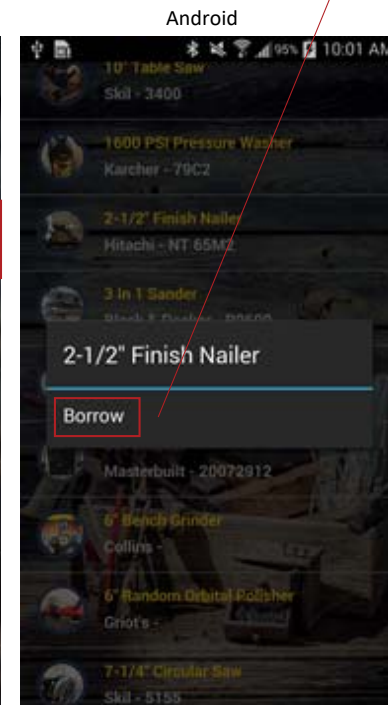
From the dashboard, clicking on the *blue button* will display the tool view for connections' available tools.



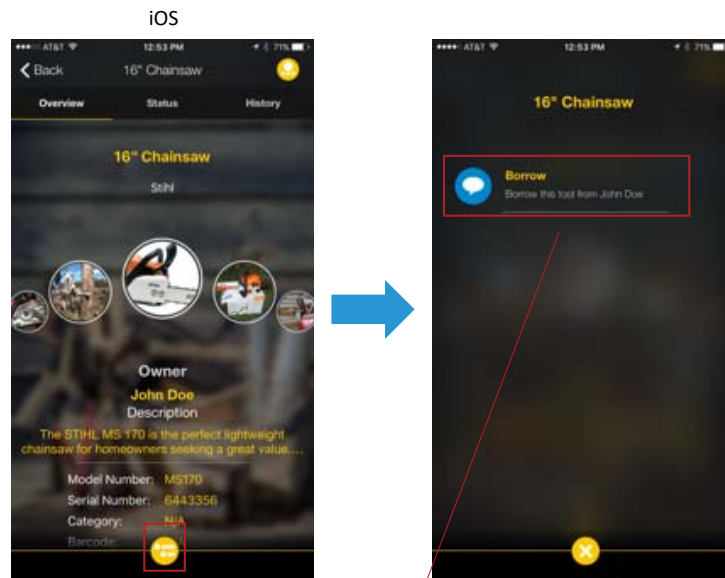
Swipe left on the tool you wish to borrow and a borrow icon will display.



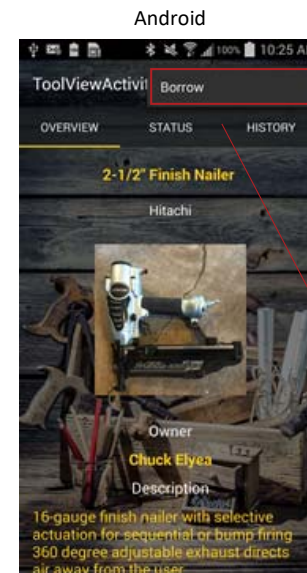
On Android devices, long press on the tool.



## Workflow – borrowing a tool on the detail tool view

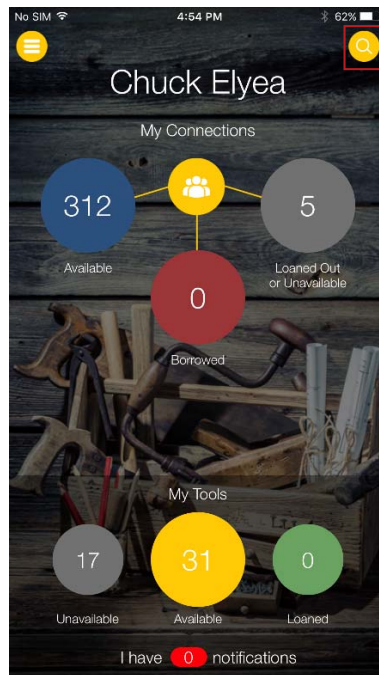


Clicking on an available tool will display the tool detail view. Clicking the *list icon* at the bottom of the screen (iOS) will display the action items available for that tool.



Clicking on an available tool will display the tool detail view. Clicking on the 3 dots at the top of the screen for Android will display the action items available for that tool.

## Workflow – borrowing a tool from search results

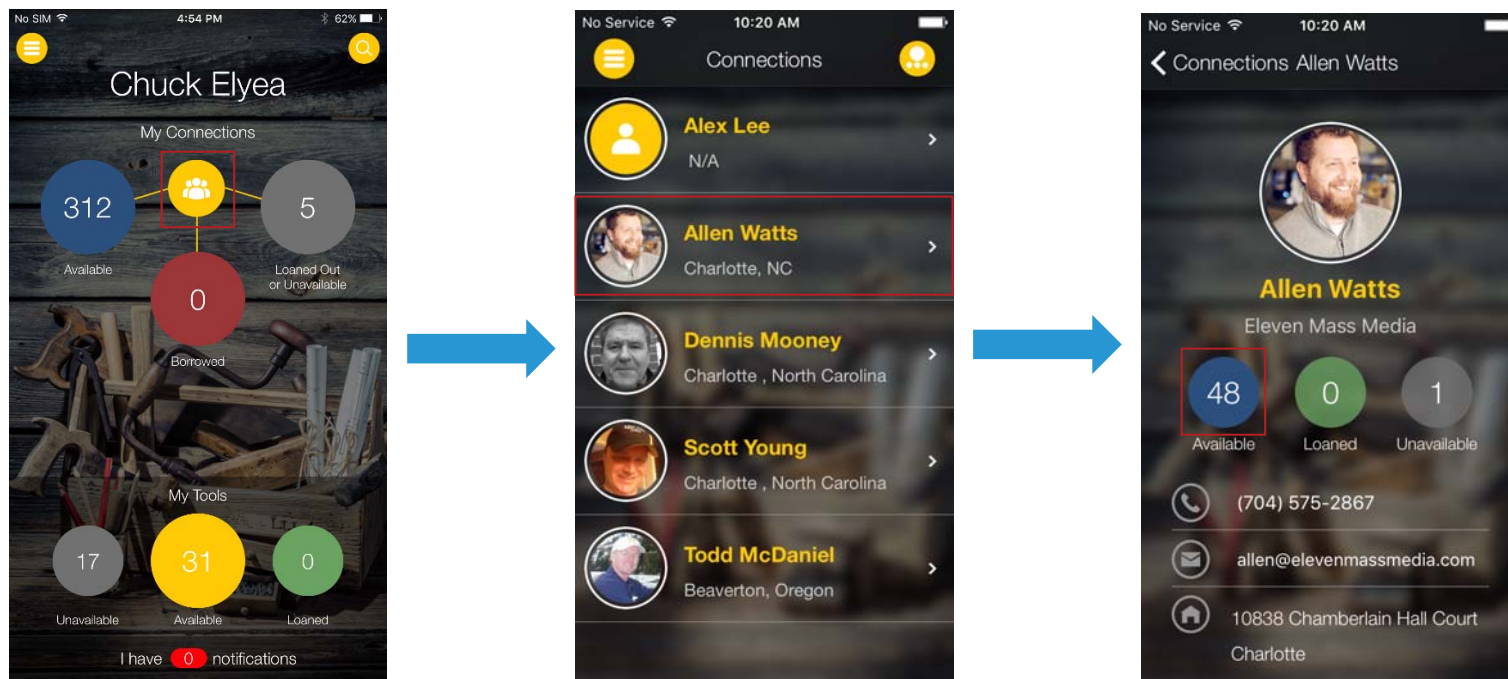


From the dashboard, click on the *search icon* (magnifying glass). From the search results, the process will be the same as borrowing a tool on the *Tool Summary View*.



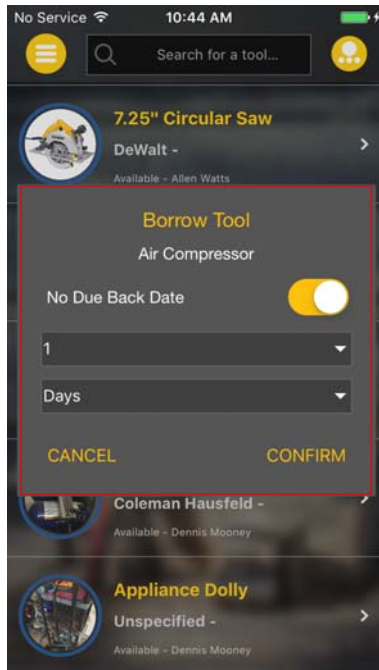
## Workflow – borrowing a tool from a connection view

Click on the *Connections* icon on the dashboard. Click on a connection and then the *available tools* icon. The process will be the same as on the *Tool Summary View*.





## Workflow – selecting a due back date



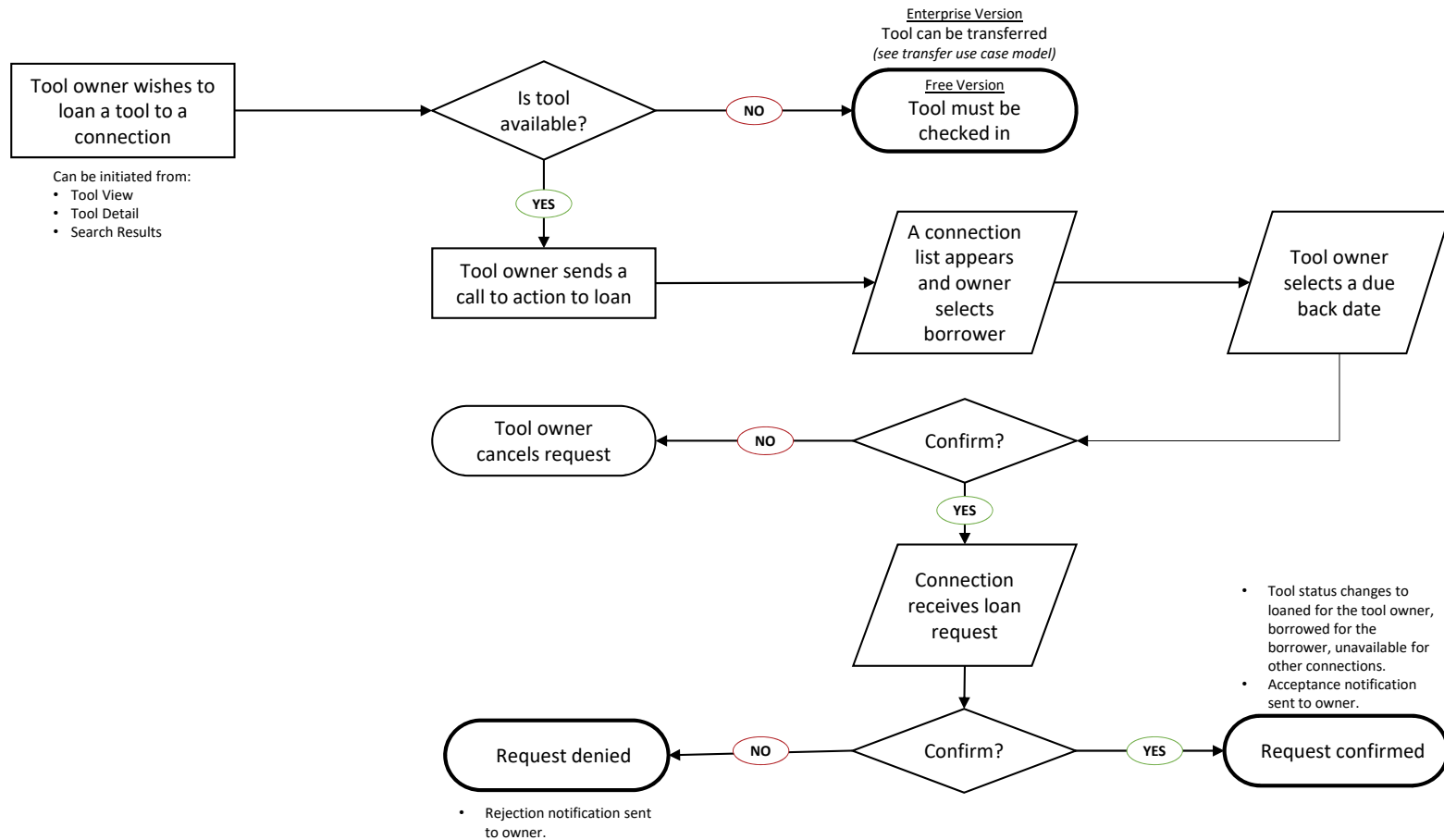
After the borrow (or loan) action is initiated, a dialog will appear to select how long the tool is needed.

- Click the dropdown list corresponding to days, weeks or months.
- If there is no due back date, click the *No Due Back Date* checkbox and the date selections will gray out.
- Click *confirm* to send a notification to the tool owner or cancel the action.

The tool owner will need to confirm the request before the tool's status is changed in the database. If a return date is selected, a notification will trigger as the return date approaches.

## Workflow – loaning a tool

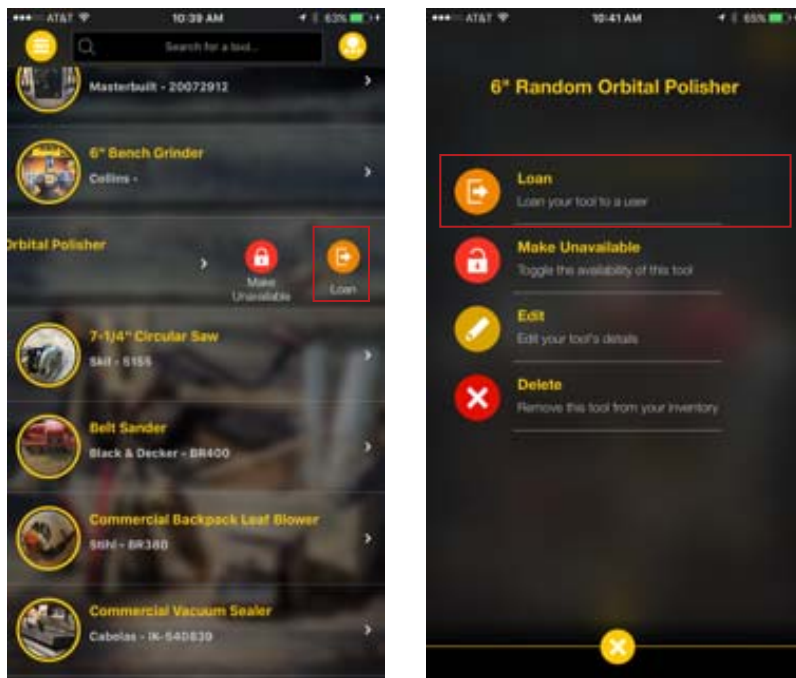
The loan workflow is illustrated below.



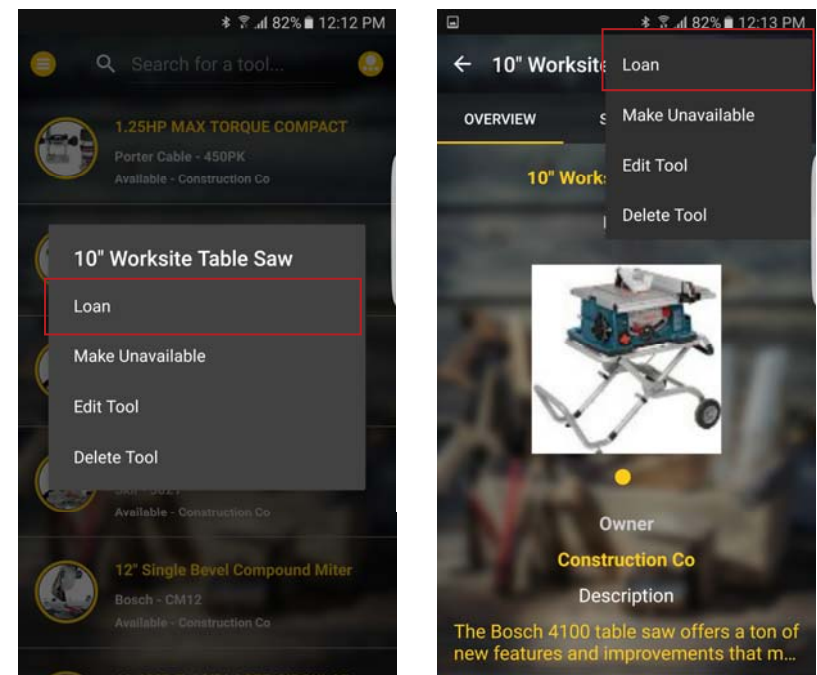
## Workflow – loaning a tool

Loaning a tool is very like borrowing a tool, but in reverse. The tool owner initiates the transaction rather than the borrower and it starts from the owner's *Tool Summary View* of available tools (yellow) or the *Tool Detail View*.

iOS

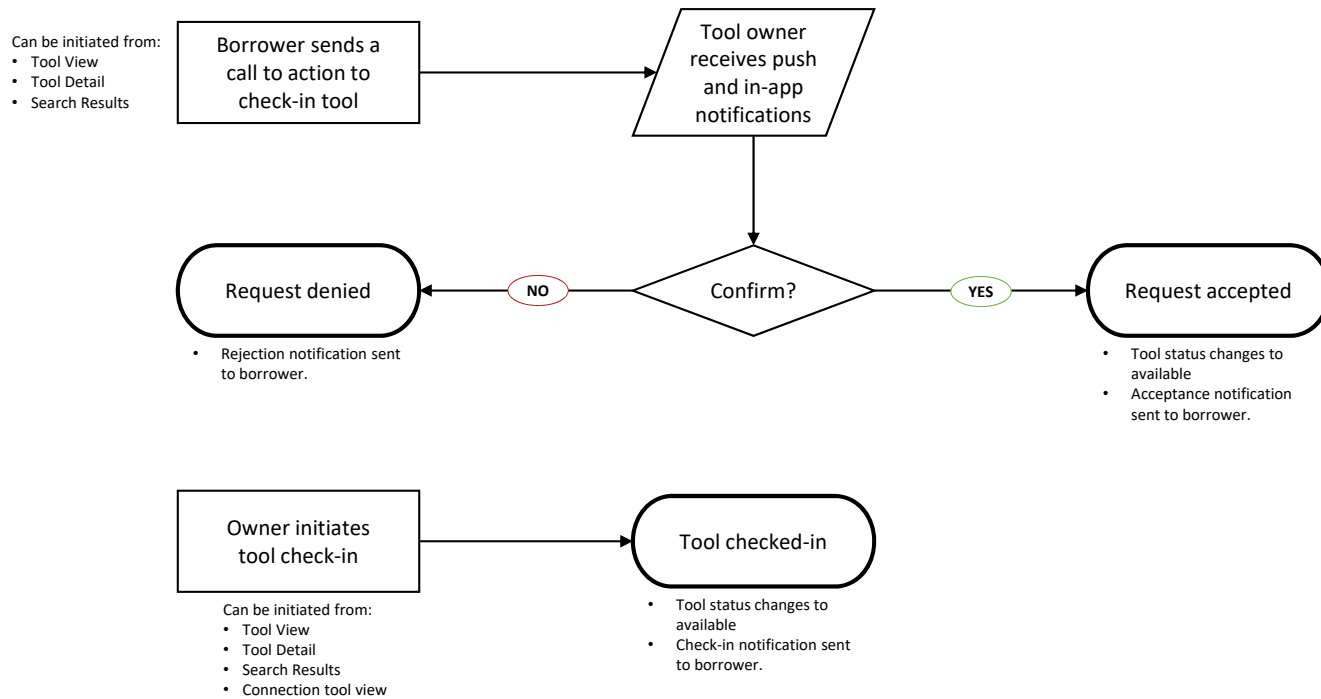


Android



## Workflow – checking in a tool

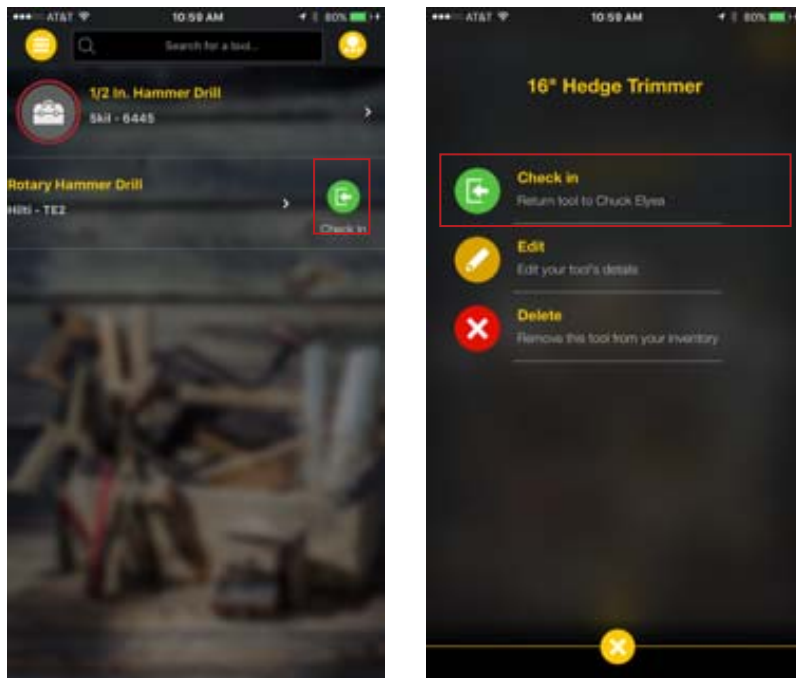
The check in workflow is illustrated below.



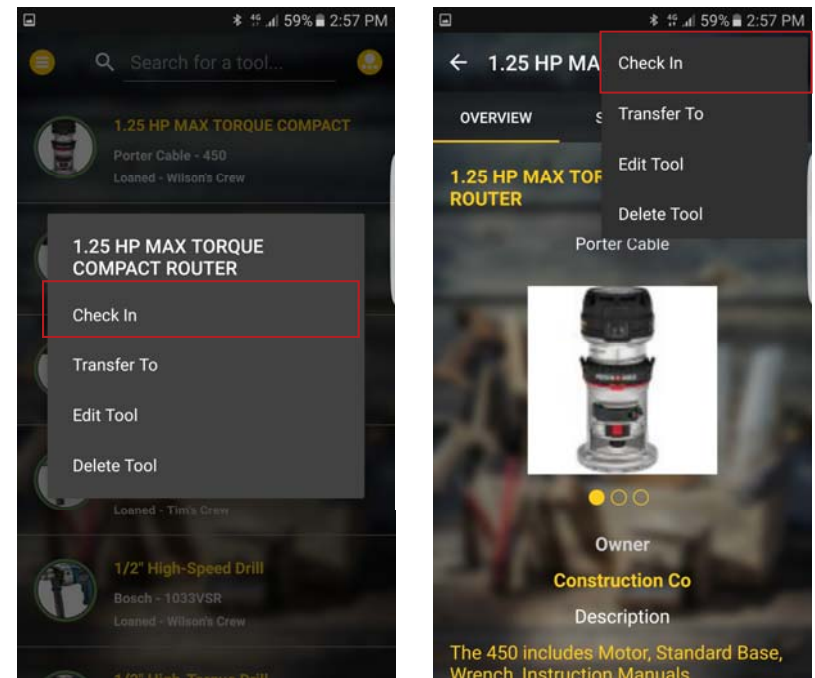
## Workflow – checking in a tool

Either a borrower or lender can initiate the check in process from either a *Tool Summary View* or *Tool Detail View*. From a *Tool Summary View*, swipe left and the check in icon will display. From a *Tool Detail View*, press the *action icon* at the bottom and an action view will display a *check in icon*. The Android workflow is the same.

iOS



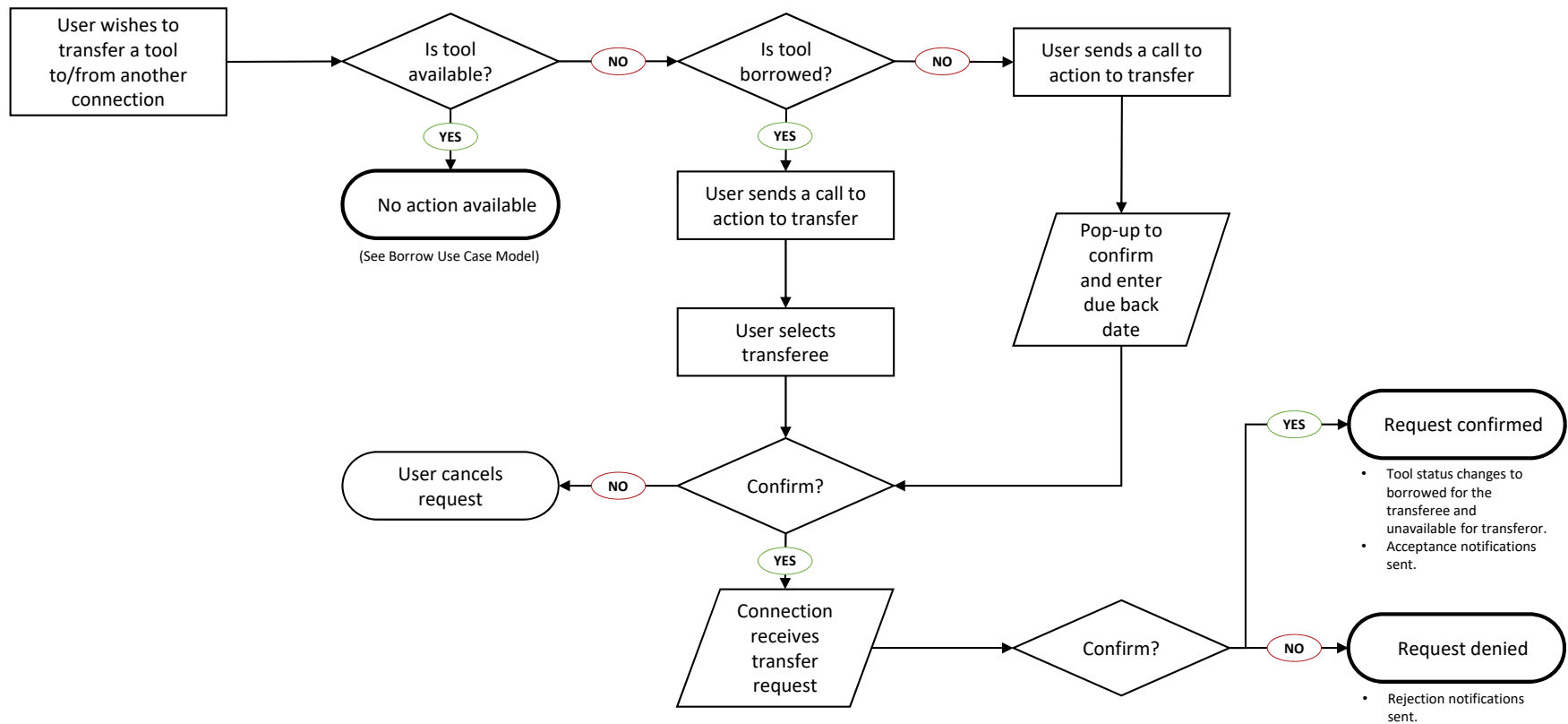
Android



When a tool owner checks in his own tool, the borrower does not accept the transaction. It's assumed that the tool owner would not check in a tool unless he really had it. If a borrower checks in a tool, the edit and delete options will not be available.

## Workflow – transferring a tool

The transfer workflow is illustrated below.

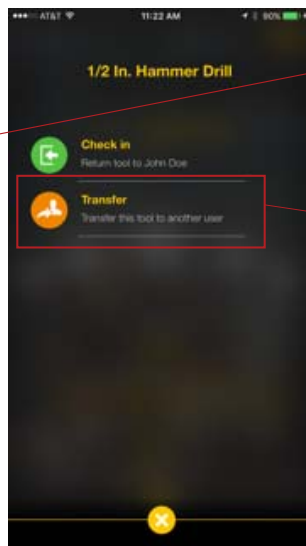


## Workflow – transferring a tool

The transfer workflow option is available to any user (generally employees) connected to an enterprise account. The concept behind transferring a tool is that:

- It bypasses the check in process
- It does not require action by a tool administrator
- It empowers field users to find and transfer needed tools without calling the office
- It saves money by allowing field employees to find needed tools before purchasing or renting them

The transfer option will display on both the *Tool Summary View* and *Tool Detail View* for any tool owned by an enterprise user with a status other than available. (If the status is available, the tool can be loaned or borrowed).

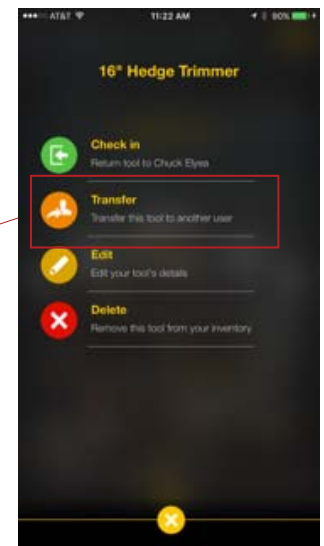


From the *Tool Summary View*, swipe left and select the *Transfer* option.

From the *Tool Detail View*, press the *action* icon at the bottom and then select the *Transfer* icon from the *action View*.

iOS

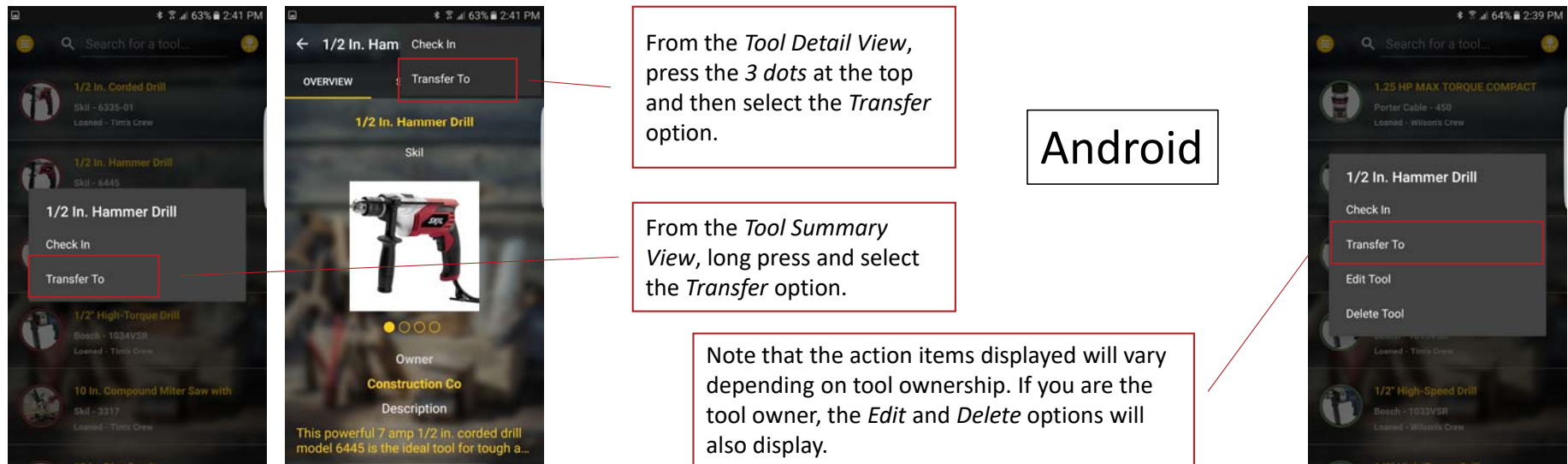
Note that the action items displayed will vary depending on tool ownership. If you are the tool owner, the *Edit* and *Delete* action icons will also display.



## Workflow – transferring a tool

The transfer workflow on **Android** is illustrated below.

When you press the transfer icon and list of connections will display. Select the connection to receive the tool. The recipient will receive a notification that must be accepted before the new borrower will be recorded in the database.



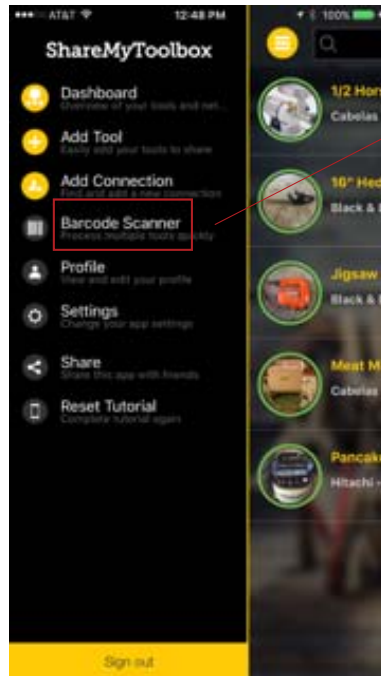


## Workflow – barcoding

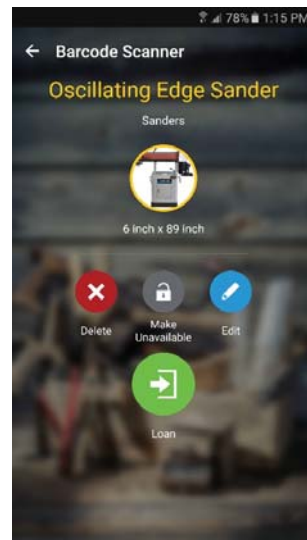
Review *Add Tools* before using the barcode option. For enterprise users that have many tools, the barcode option is a quick way to loan or check in a tool.



*Non-enterprise users will see the barcode feature, but will not be able to add a barcode to the tool record. However, they will be able to scan barcodes and search for enterprise connections' tools that match the number retrieved.*

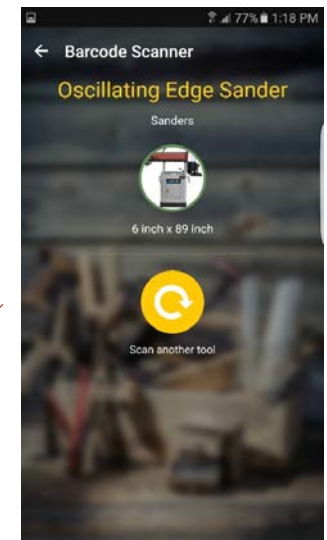


From the main menu press the *Barcode Scanner* option.



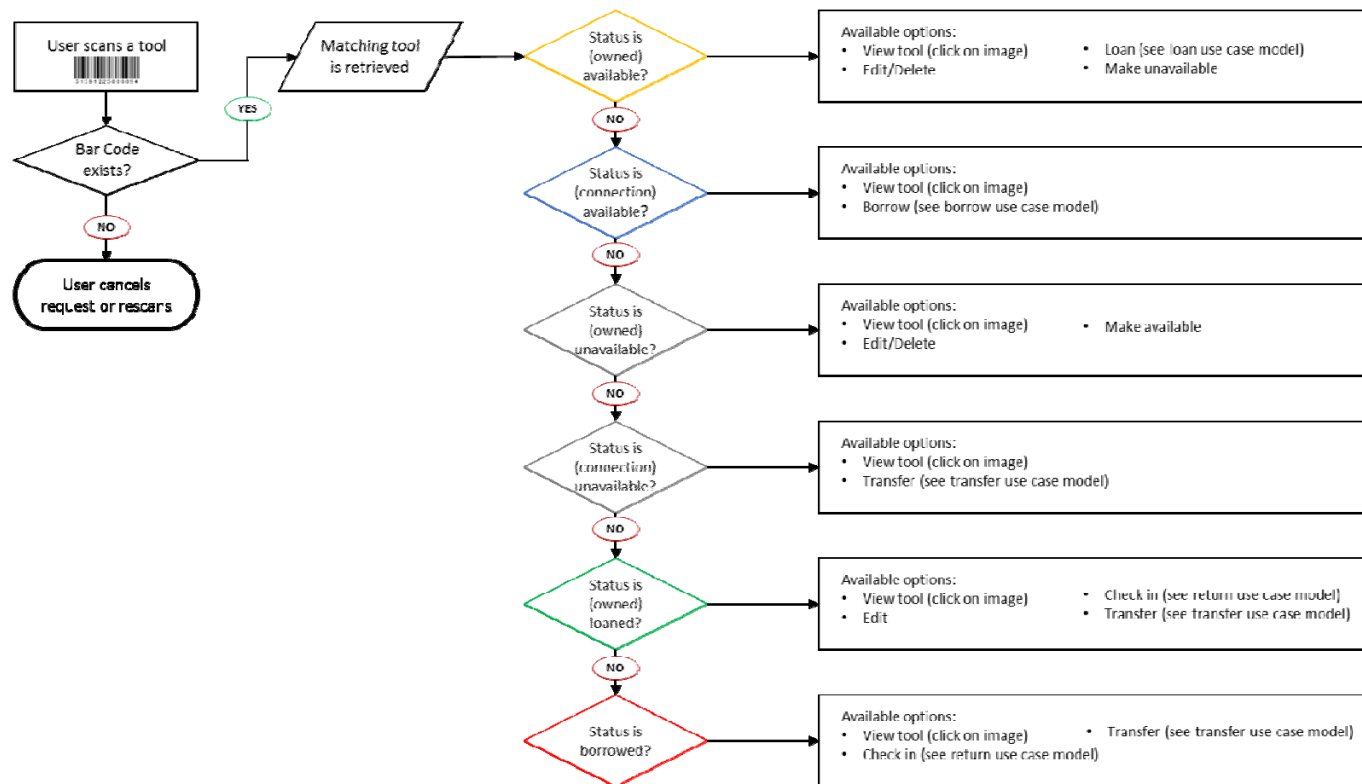
Scan the tool's barcode. The tool matching the barcode will display.

If no tool matching the barcode is found, an error message will display with the option to *Rescan* or the option to rescan will display after a tool was successfully processed.



## Workflow – barcoding

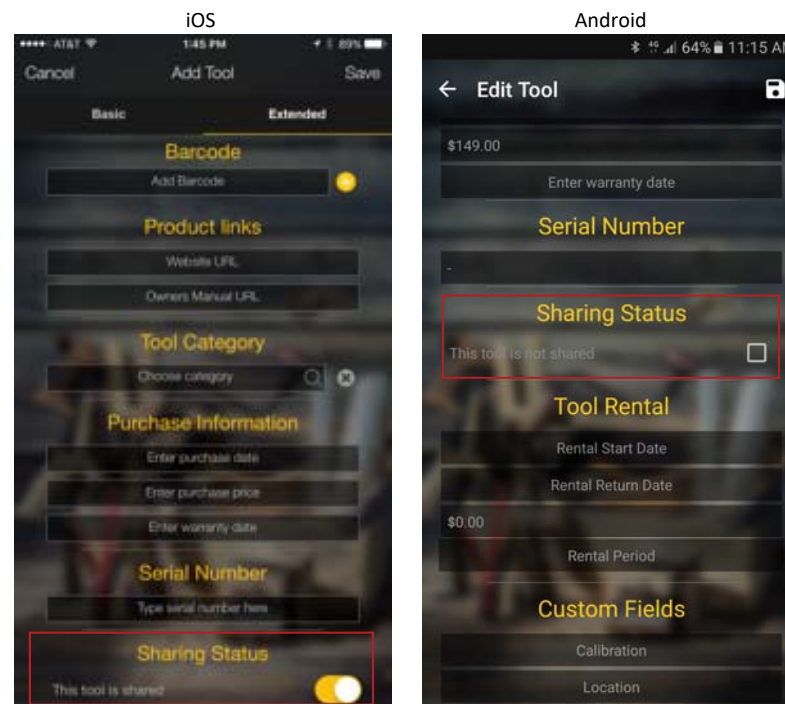
The action items displayed will depend on the tool status. For example, if the tool has an available status and an administrator is scanning a company-owned tool, *Loan* will display. Conversely, if the status is loaned and an administrator is scanning the tool, *Check In* will display. Review the workflow diagram below for all statuses:



## Workflow – making a tool unavailable

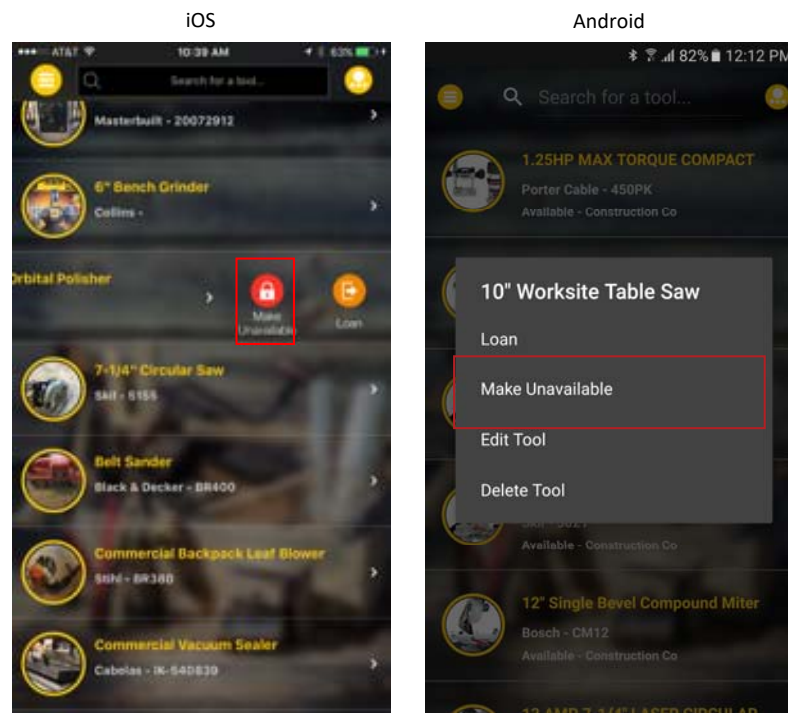
There are two ways to make a tool unavailable with each used for different reasons:

1. **Sharing status** – On the extended tab of the tool record (iOS) set the *Sharing Status* to *Not Shared*. On Android, scroll down to the *Sharing Status* field. The tool's status will appear as gray to the tool owner, but will not display to connections. This is useful for items you wish to track, but remain private.



## Workflow – making a tool unavailable

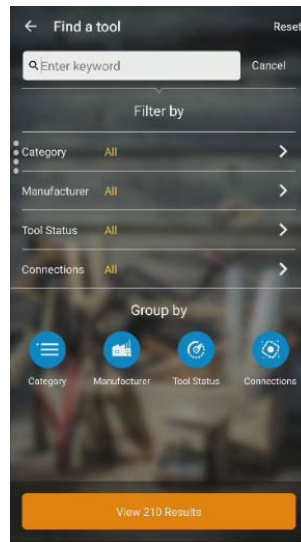
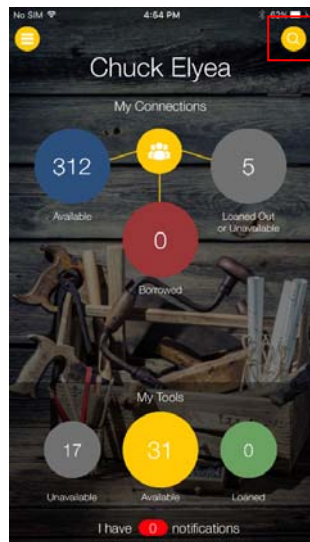
2. **Unavailable** – If you are the tool owner and the status is available (yellow), swipe left on the *Tool Summary View* and select the *Make Unavailable* action icon (iOS). On Android, long press on the *Tool Summary View* and select the *Make Unavailable* option. The tool will remain visible to connections, but cannot be borrowed. This is useful for tools that are out for maintenance or repair.



## Search

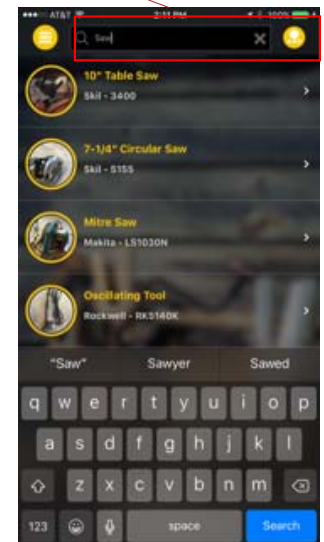
There are two ways to search for a tool, from the dashboard or any tool view.

From the dashboard, press the magnifying glass icon on the menu bar. A powerful global search option will display that allows you to filter and group results.

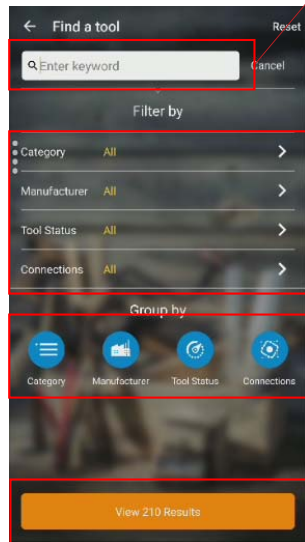


*Enter key words in the description field when you set up a new tool to increase your search options.*

From any *Tool Summary View*, enter a text string in the search box for a “best fit” search. It’s not necessary to press the search button on the keyboard.



## Search

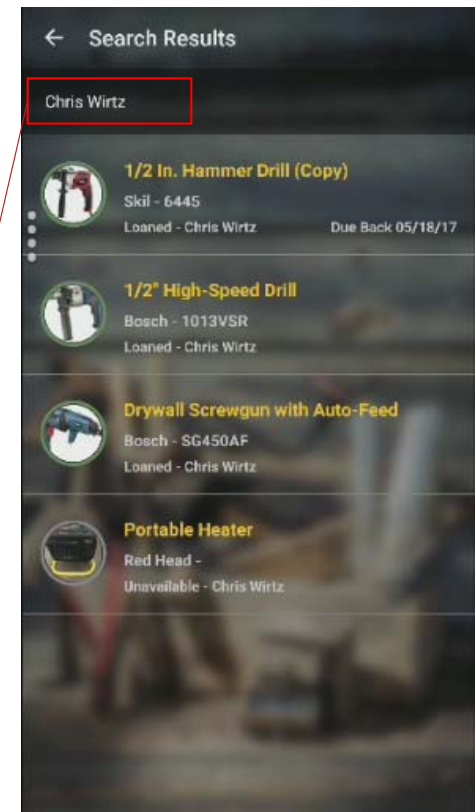
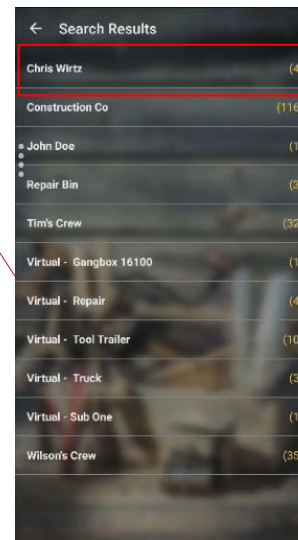
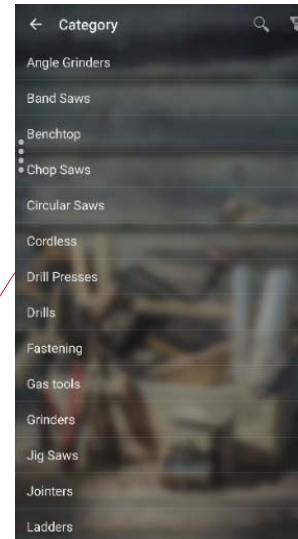


Key word search will find matching results in the following fields: tool title, description, manufacturer, category and barcode.

Apply filters by category, manufacturer, tool status or connection.

Group the resulting data by category, manufacturer, tool status or connection.

As you apply filters and search key words, the number of matching results will display dynamically.



From the search results view, the ShareMyToolbox functionality is identical to the rest of the system.