



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.

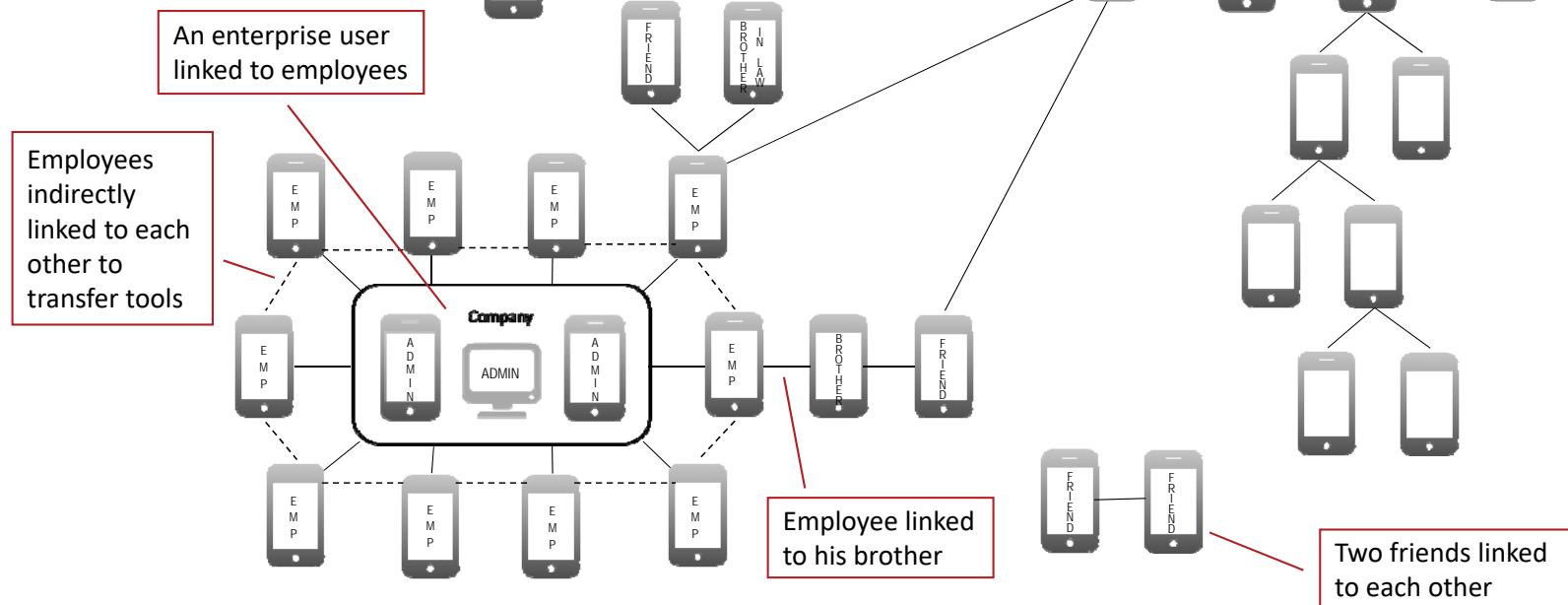
Before we jump into the detailed documentation, let's make sure you understand some of the basic concepts. ShareMyToolbox is built upon a peer-to-peer sharing platform for both the free version and the paid enterprise version (although the enterprise version has enhanced sharing features that will be 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.

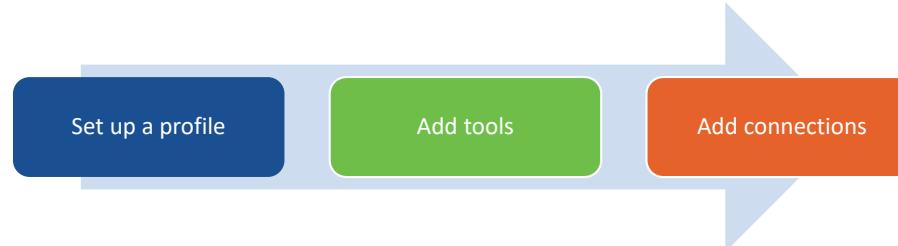
Peer-to-peer sharing design

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:



Registering as a new enterprise user

An enterprise administrator creating new employee connections



On the mobile device after you've downloaded the app, but before you log in for the first time

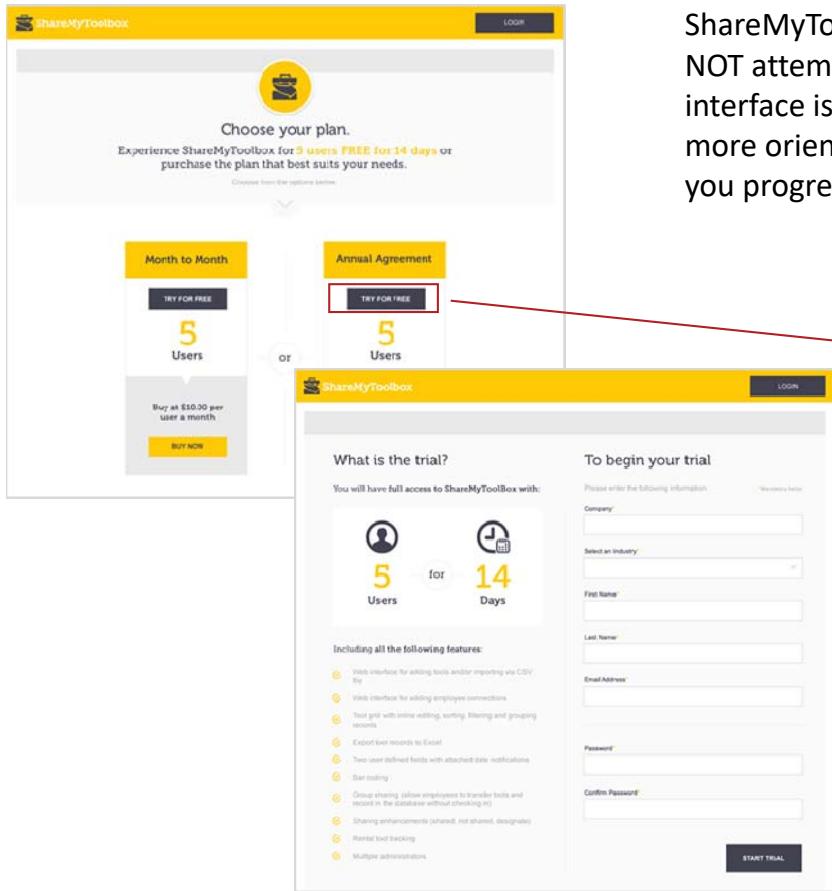


All references to the web interface apply to the enterprise version only. Most mobile screenshots are from iOS, but Android differences are noted where appropriate.



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)



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

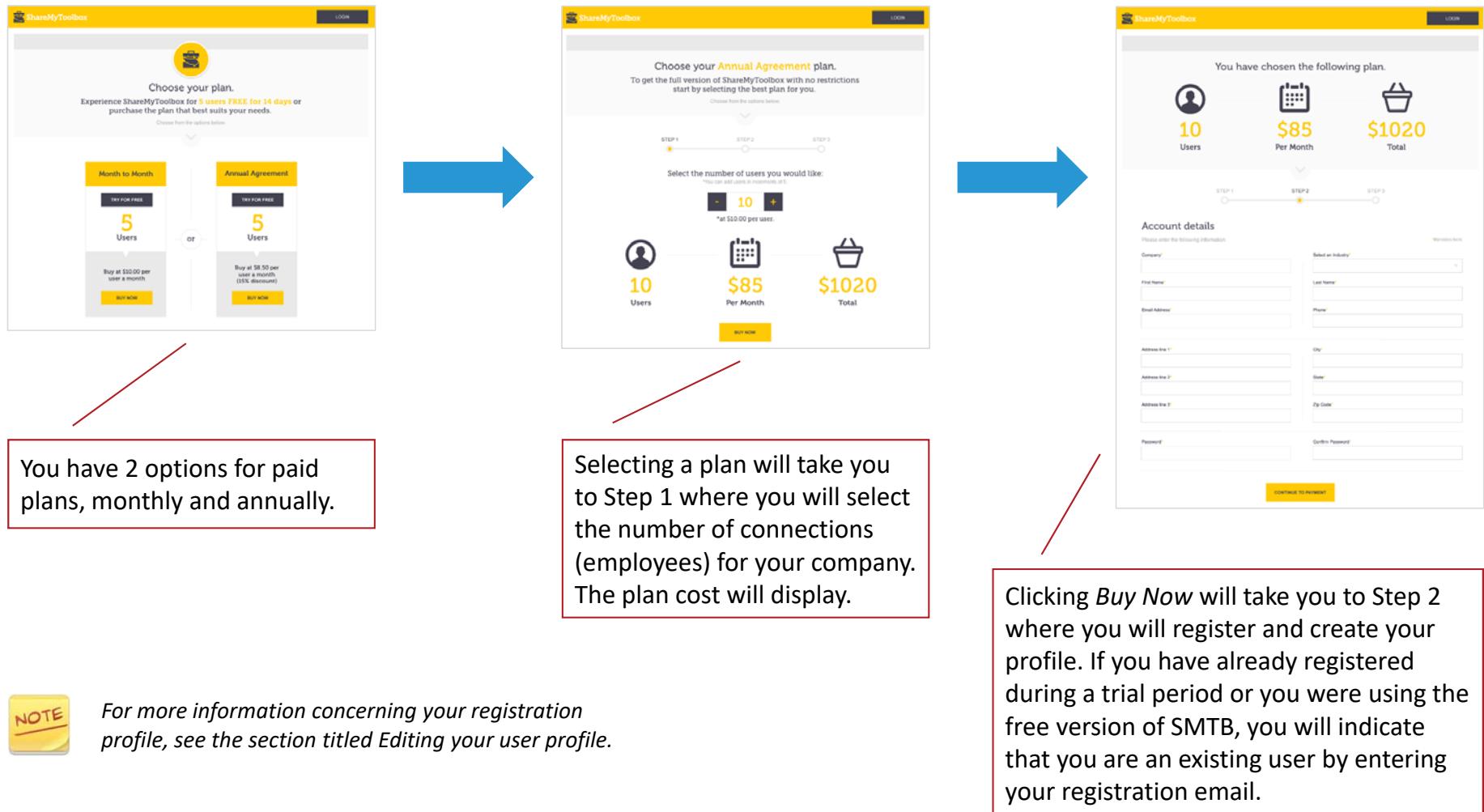
14-day free trial

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

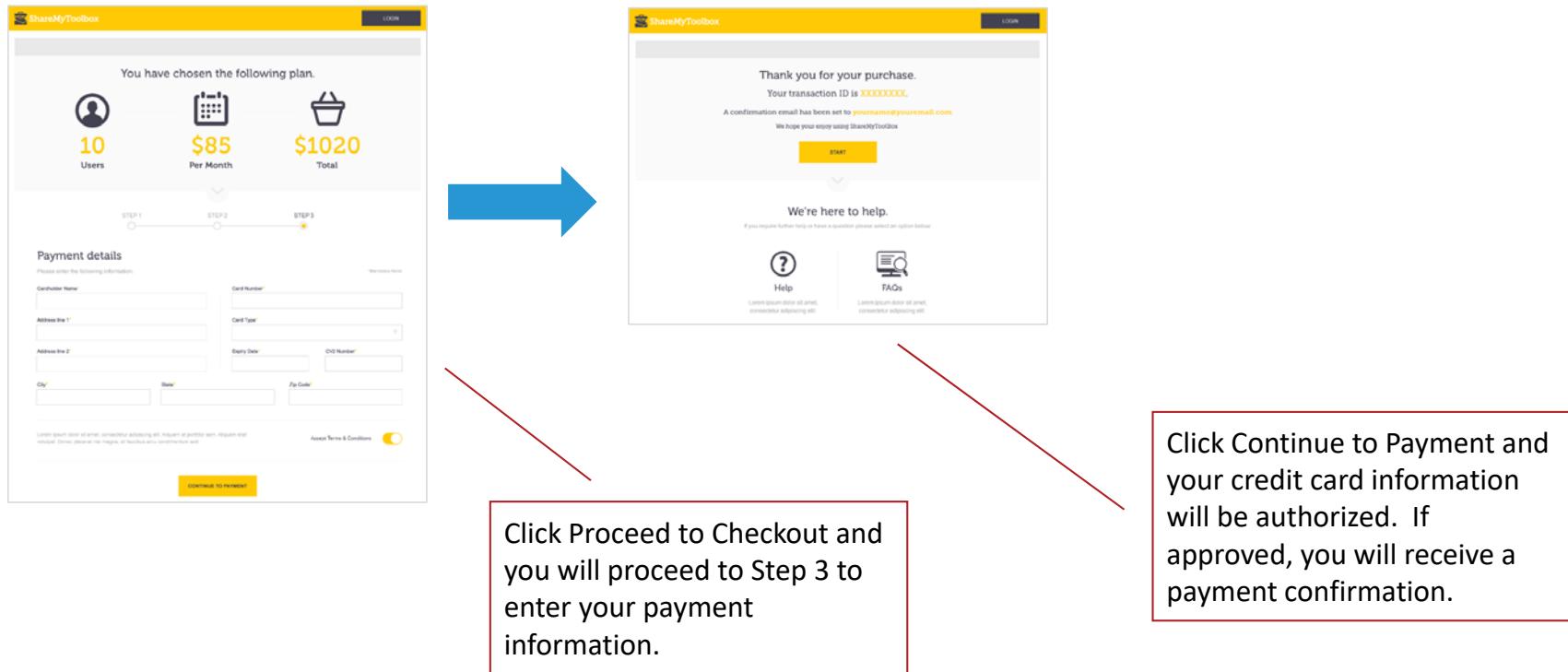
Selecting this option will take you to the registration screen. When you complete the registration, you will have a 14-day trial period with a maximum of 5 connections. At the expiration of the trial, you can either convert to a paid subscription or revert to the free version. You will not lose any data 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.

Enterprise subscription

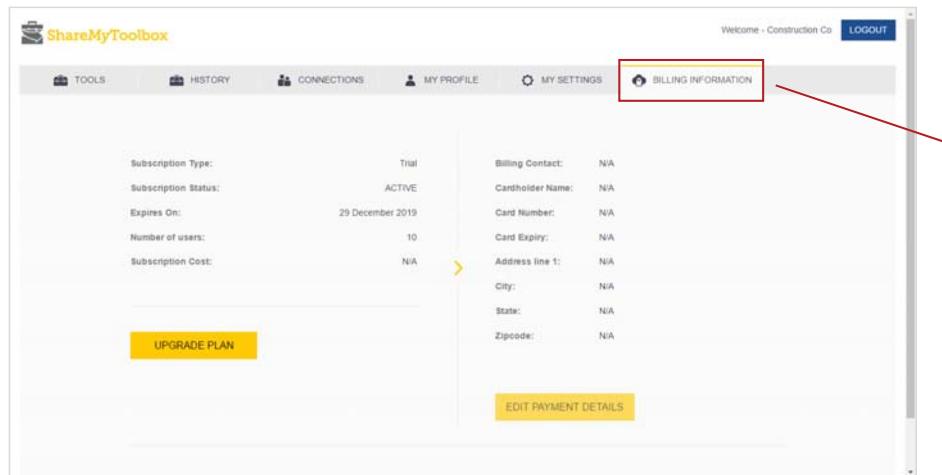


Enterprise subscription



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

Changing your subscription



The screenshot shows the 'Billing Information' tab selected in the top navigation bar. The interface displays various subscription details: Subscription Type (Trial), Subscription Status (ACTIVE), Expires On (29 December 2019), Number of users (10), and Subscription Cost (N/A). Below this, there are fields for Billing Contact, Cardholder Name, Card Number, Card Expiry, Address line 1, City, State, and Zipcode, all currently marked as 'N/A'. At the bottom of the page are two buttons: 'UPGRADE PLAN' and '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

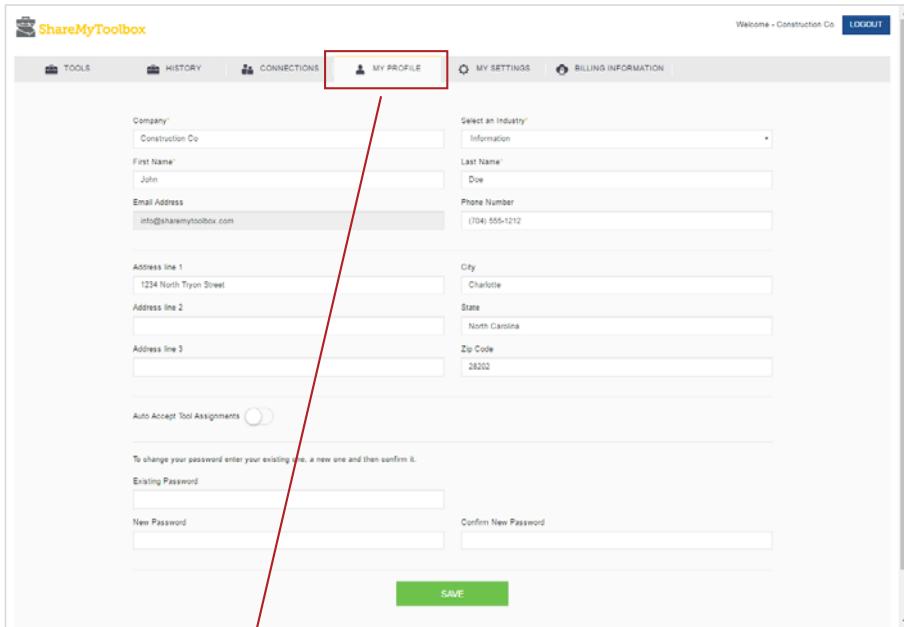
If you downgrade your plan, modifications will go into effect at the end of your current subscription period. Plan upgrades will take effect immediately and charges will be prorated according to your subscription type.

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



A screenshot of the ShareMyToolbox 'My Profile' tab. The tab is highlighted with a red box. The form includes fields for Company (Construction Co), First Name (John), Email Address (info@sharemytoolbox.com), Address (1234 North Tryon Street, Charlotte, NC 28202), Auto Accept Tool Assignments (checkbox), and Password fields (Existing, New, Confirm). A 'SAVE' button is at the bottom.

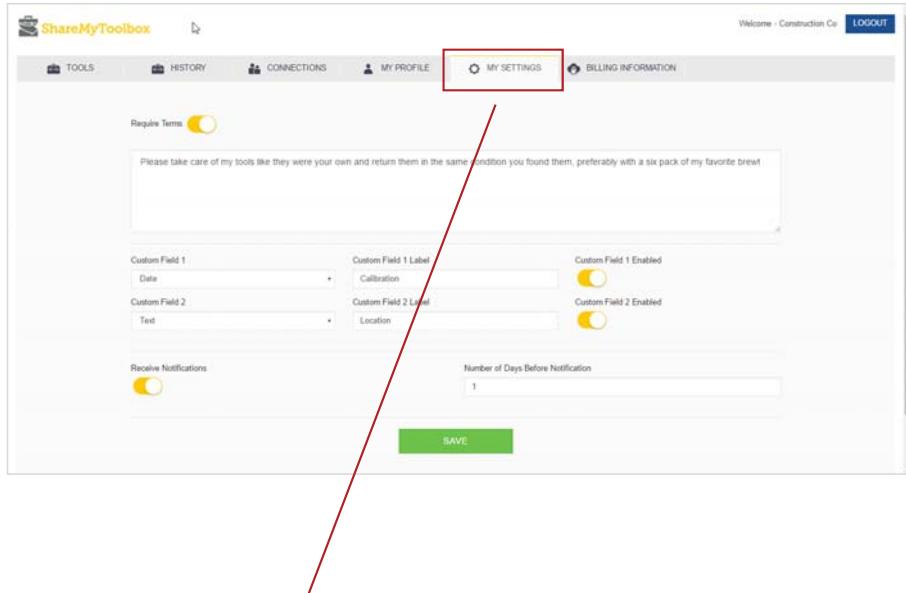
When you log into the enterprise version of SMTB, select the *My Profile* tab.



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.

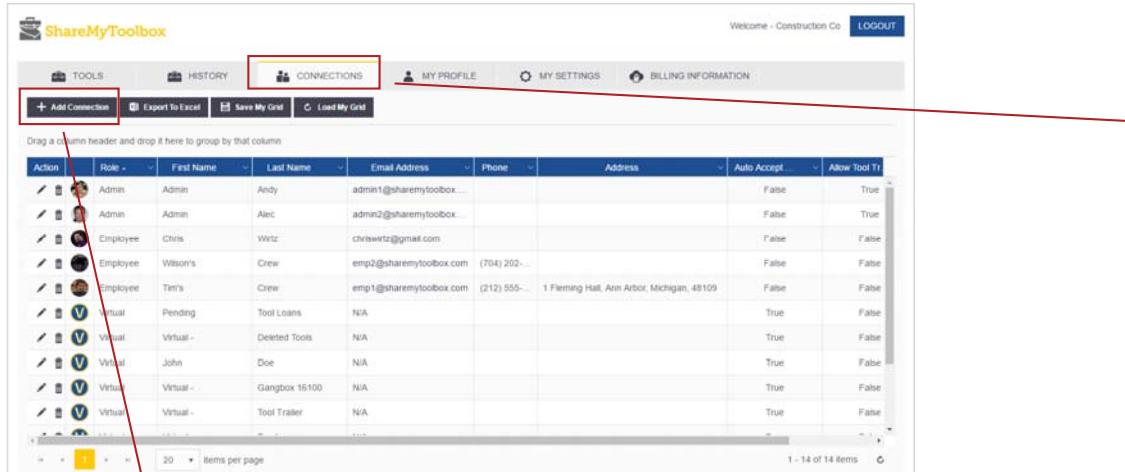
Settings



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



Action	Role	First Name	Last Name	Email Address	Phone	Address	Auto Accept	Allow Tool T
	Admin	Admin	Andy	admin1@sharemytoolbox...			False	True
	Admin	Admin	Alec	admin2@sharemytoolbox...			False	True
	Employee	Chris	Wetz	chrinwetz@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
	Pending	Tool Loans		N/A			True	False
	Virtual	Deleted Tools		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

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).

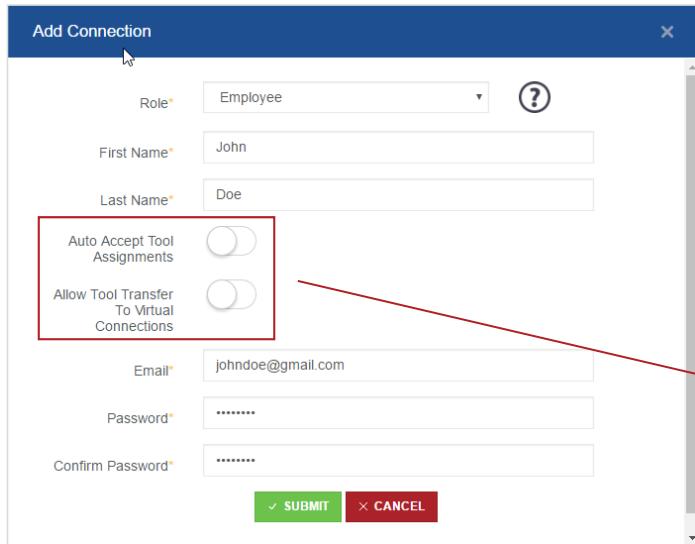
Select the Add Connection button to add new connections. Remember, connections will generally be employees for enterprise users.

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



The screenshot shows the 'Add Connection' dialog box. The 'Role' dropdown is set to 'Employee'. The 'First Name' field contains 'John' and the 'Last Name' field contains 'Doe'. The 'Email' field contains 'johndoe@gmail.com'. Two toggle switches are highlighted with a red box: 'Auto Accept Tool Assignments' and 'Allow Tool Transfer To Virtual Connections'. The 'SUBMIT' button is at the bottom.

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.

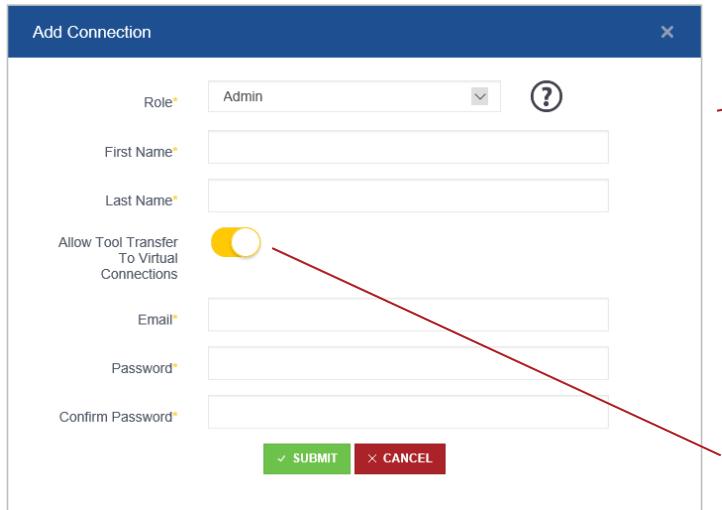


We recommend leaving these settings to OFF.

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' dialog box. It includes fields for 'Role' (set to 'Admin'), 'First Name', 'Last Name', 'Email', 'Password', and 'Confirm Password'. A toggle switch for 'Allow Tool Transfer To Virtual Connections' is turned on. At the bottom are 'SUBMIT' and 'CANCEL' buttons.

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:

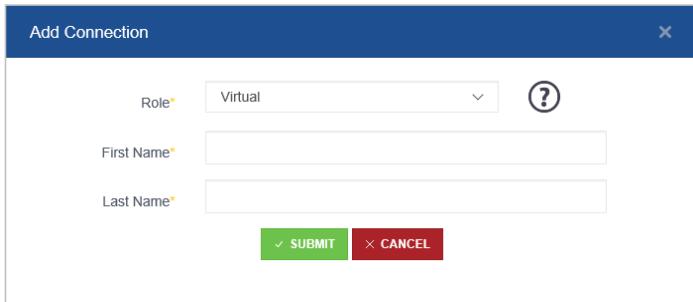
1. *Employee must delete any personal tools.*
2. *Log off the mobile device.*
3. *Change roll to admin.*
4. *Log back onto mobile device.*

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



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:

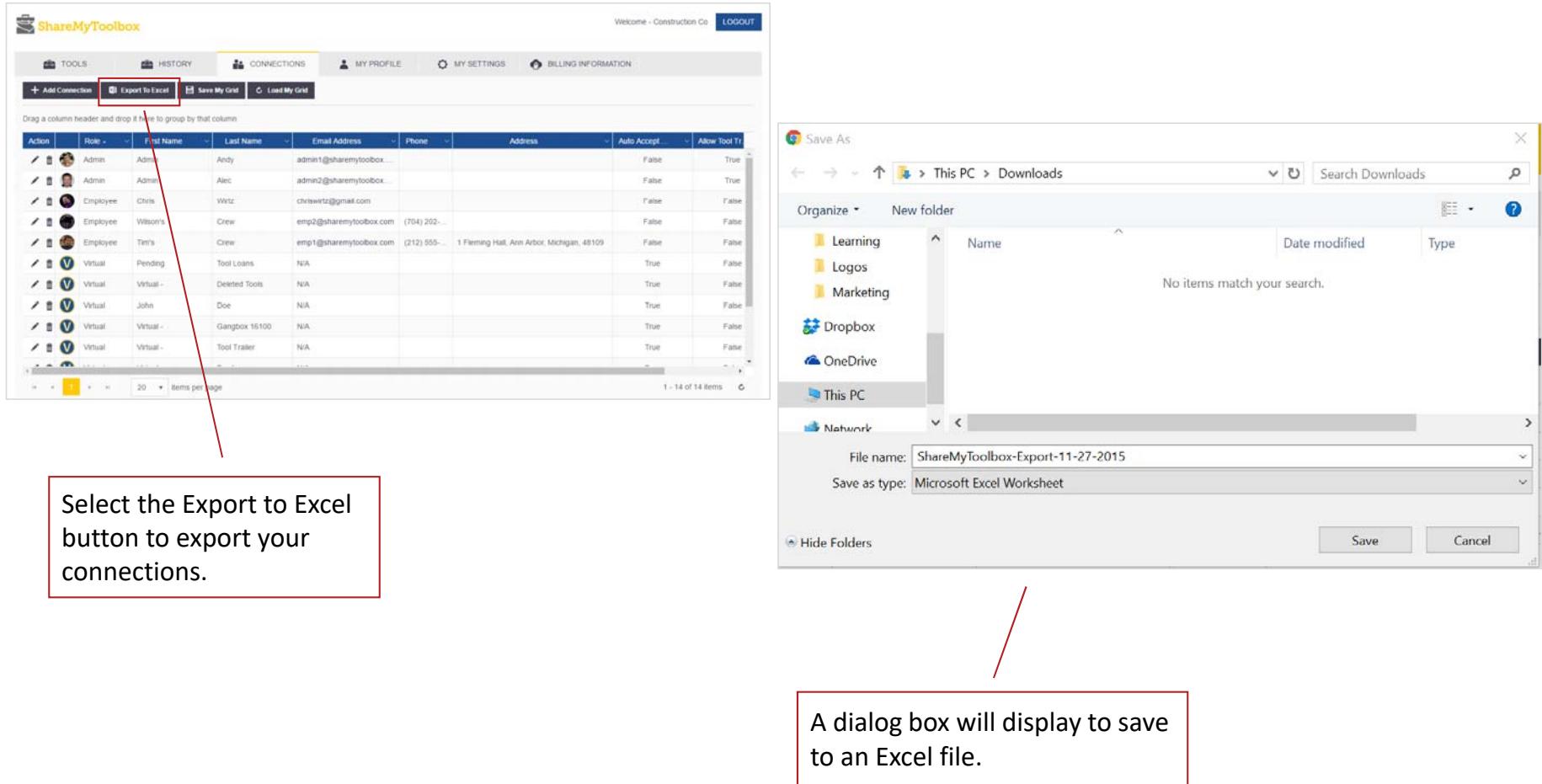
- Used for any tool assignment without accountability.
- Tool assignments are automatically accepted.



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 tools permanently assigned to a truck.

Exporting connections to Excel



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	Andy		admin1@sharemytoolbox...			False	True
	Admin	Alec		admin2@sharemytoolbox...			False	True
	Employee	Chris	Weltz	chrinweltz@gmail.com			False	False
	Employee	Wilson's	Crew	emp2@sharemytoolbox.com	(704) 202...	1 Fleming Hall, Ann Arbor, Michigan, 48109	False	False
	Employee	Tim's	Crew	emp1@sharemytoolbox.com	(212) 555...		False	False
	Pending	Tool Loans		N/A			True	False
	Virtual	Deleted Tools		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

1 - 14 of 14 items

20 Items per page

Select the Export to Excel button to export your connections.

Save As

Organize New folder

Learning Logos Marketing

Dropbox OneDrive

This PC

Network

File name: ShareMyToolbox-Export-11-27-2015

Save as type: Microsoft Excel Worksheet

Hide Folders Save Cancel

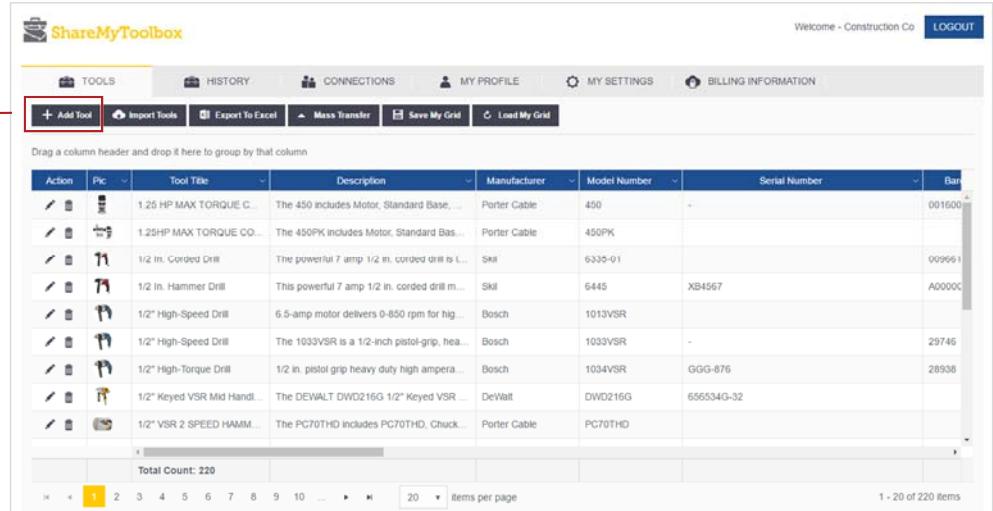
A dialog box will display to save to an Excel file.

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	Rental Tool	<input checked="" type="checkbox"/>
Description	The 450 includes Motor, Standard Base, Wrench, Instruction Manuals.	Calibration	07/14/2016 <input type="button" value=""/>
Manufacturer	Porter Cable	Location	
Model Number	450	Owners Manual Url	
Serial Number	-	Website Url	http://www.portercable.com/Products
Barcode	0016000513693	<input type="button" value="MANAGE IMAGES"/>	
Category	Routers		
Purchase Date	8/24/2016 <input type="button" value=""/>		
Purchase Price	\$119.00 <input type="button" value=""/>		
Warranty Date	08/18/2016 <input type="button" value=""/>		
Sharing Status	<input checked="" type="checkbox"/>		
<input type="button" value="✓ SAVE"/> <input type="button" value="✗ CANCEL"/>			



The screenshot shows the ShareMyToolbox interface with the 'TOOLS' tab selected. At the top, there is a navigation bar with links for 'HISTORY', 'CONNECTIONS', 'MY PROFILE', 'MY SETTINGS', and 'BILLING INFORMATION'. On the right, there are 'Welcome - Construction Co' and 'LOGOUT' buttons. Below the navigation bar is a search bar with the placeholder 'Search Tools'. Underneath the search bar is a table with columns: Action, Pic, Tool Title, Description, Manufacturer, Model Number, Serial Number, and Barcode. The table contains 220 items. A red box highlights the '+ Add Tool' button in the top left corner of the table header. The table also includes a 'Total Count: 220' label and a 'Items per page' dropdown set to 20.

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 tap 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.



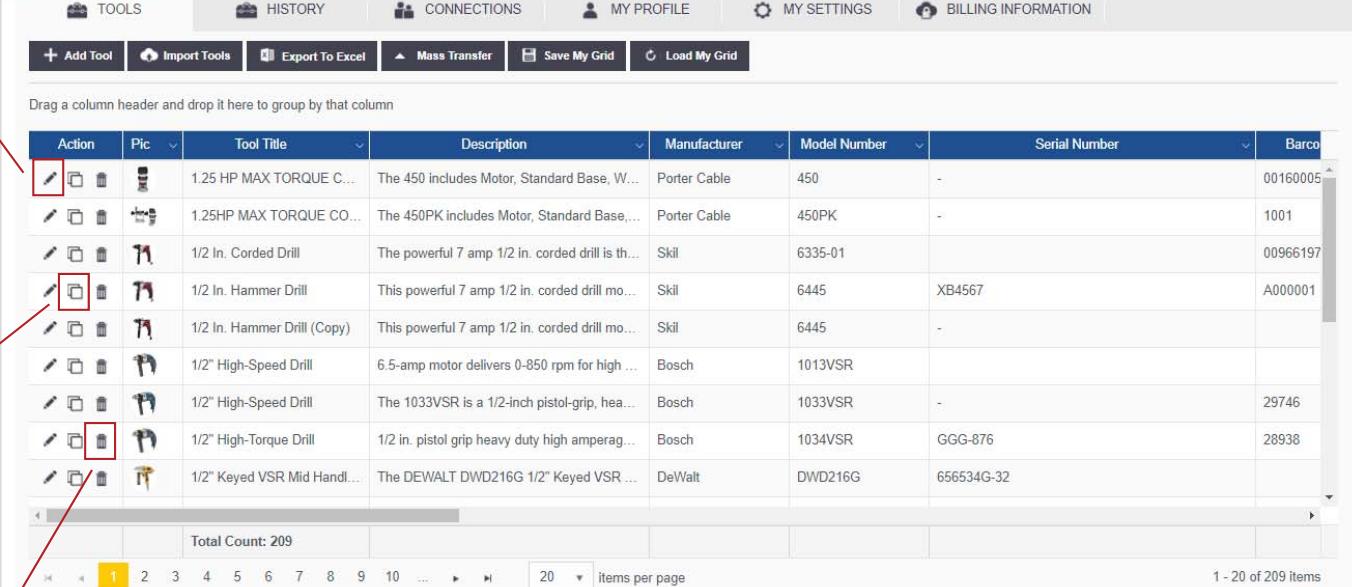
Create a folder to contain images of common tools for later reuse.

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.



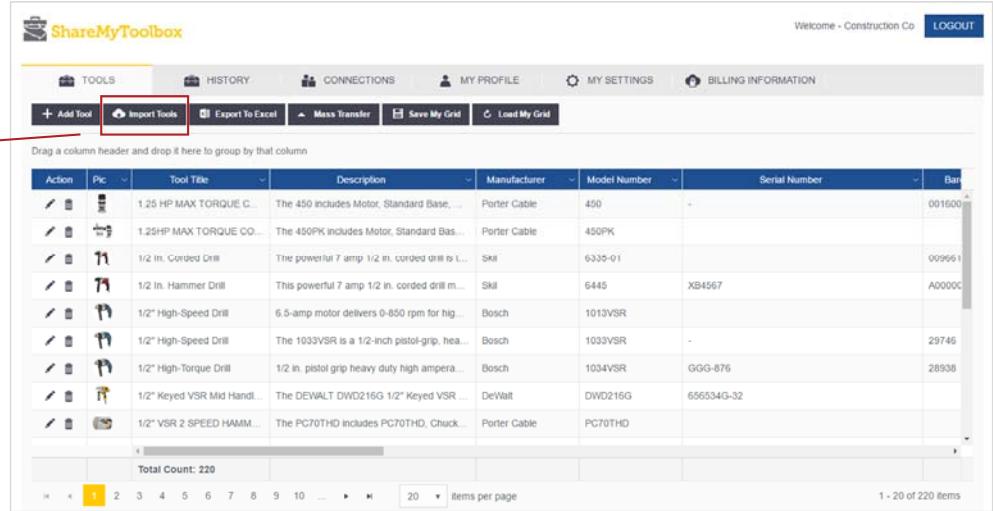
The screenshot shows the ShareMyToolbox interface with a grid of tools. The grid columns include Action, Pic, Tool Title, Description, Manufacturer, Model Number, Serial Number, and Barcode. Each row represents a tool record. The Action column contains icons for edit, copy, and delete. Red boxes highlight the edit icon in the first row, the copy icon in the second row, and the delete icon in the third row. The interface includes a navigation bar with links for Tools, History, Connections, My Profile, My Settings, Billing Information, and buttons for Add Tool, Import Tools, Export To Excel, Mass Transfer, Save My Grid, and Load My Grid. A note at the bottom of the grid says 'Drag a column header and drop it here to group by that column'. At the bottom, there are pagination controls (1-10, 20 items per page), a note 'Total Count: 209', and a message '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

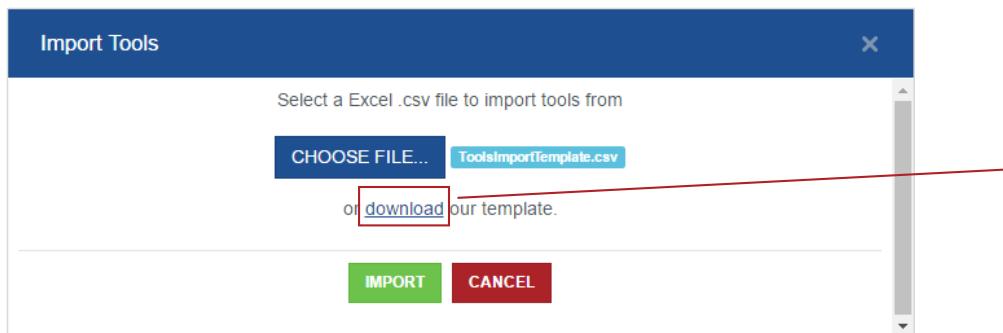
When you log into the enterprise version of SMTB, select the Tools tab and click the *Import Tools* button.



The screenshot shows the ShareMyToolbox interface with the 'TOOLS' tab selected. The 'Import Tools' button is highlighted with a red box. The table below lists various tools with columns for Action, Pic, Tool Title, Description, Manufacturer, Model Number, Serial Number, and Bar. A total of 220 items are listed.

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	-	009561
		1/2 In. Corded Drill	The powerful 7 amp 1/2 in. corded drill is l...	Skil	6339-01	-	009561
		1/2 In. Hammer Drill	This powerful 7 amp 1/2 in. corded drill m...	Skil	6445	XB4567	A0000C
		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	-	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	6565534G-32	-
		1/2" VSR 2 SPEED HAMM...	The PC70THD includes PC70THD, Chuck...	Porter Cable	PC70THD	-	-
Total Count: 220							

A dialog box will display.

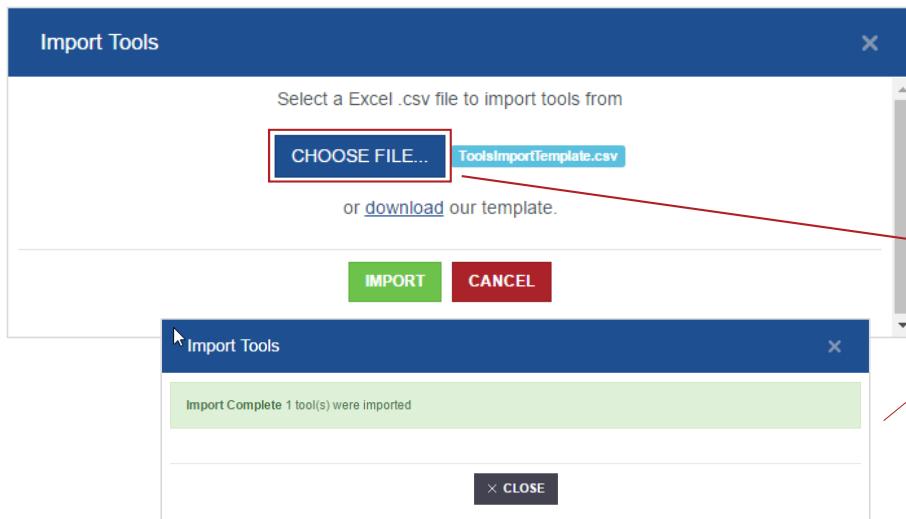


Click on the template download for the required CSV format.

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.



A	B	C	D	E	F	G	H	I	J	K	L
1	Title	Description	Manufacturer	Model	Number	Website	UI	Owners	Category	Purchase Date	Purchase Price
2	Example	T	Example	Unspecified	ABC123	http://www.abc.com	http://www.abc.com	Uncategorized	1/1/2015	100	1/1/2018
3											
4											
5											
6											
7											

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.

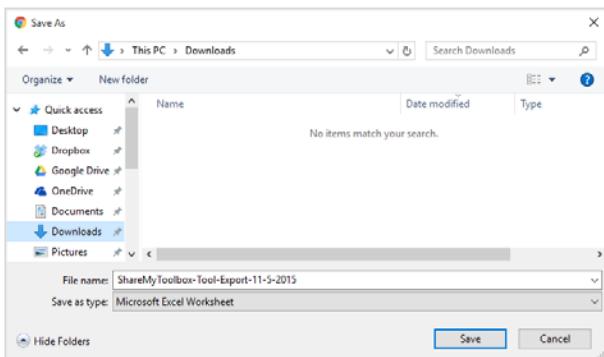
Exporting tools to Excel

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.

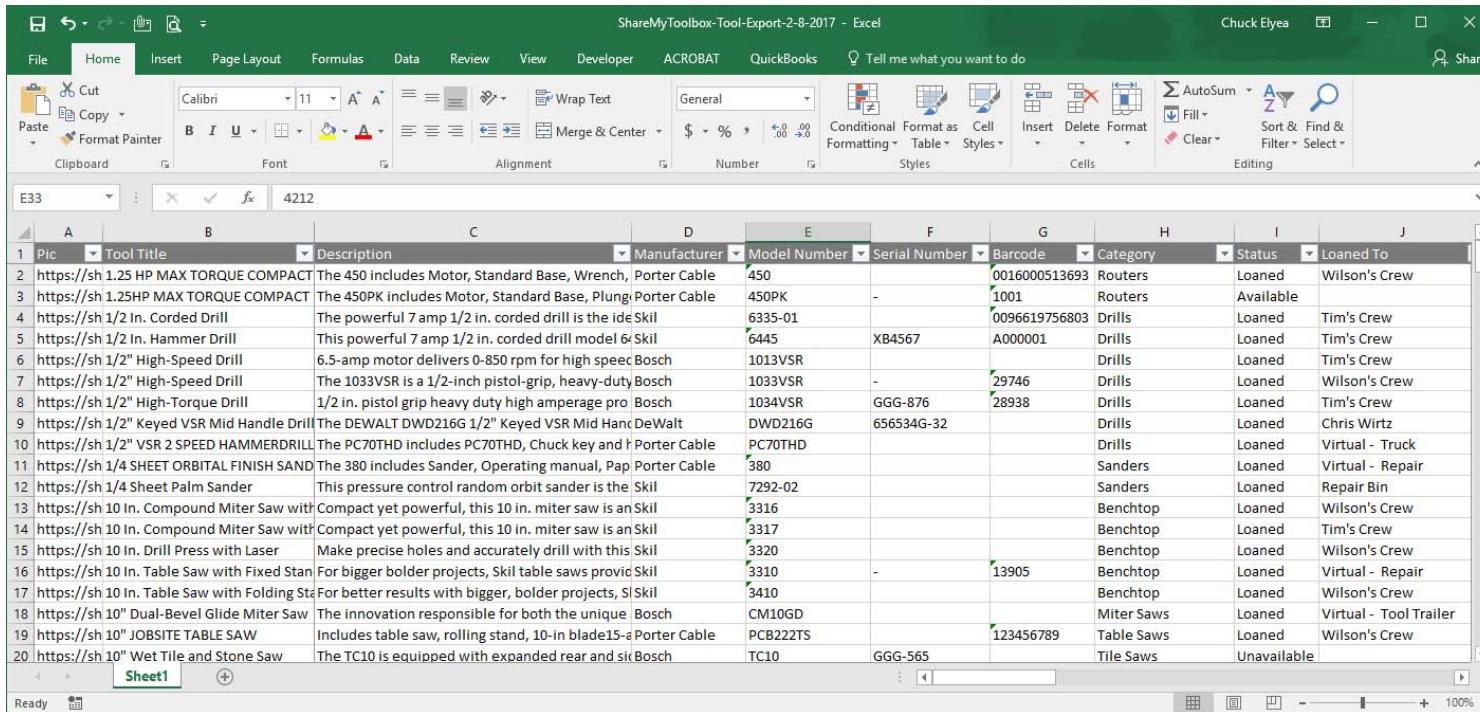
Click on the Export to Excel button on the *Tools* tab and a dialog box will appear.



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 is...	Skil	6330-01	009951	
		1/2 in. Hammer Drill	This powerful 7 amp 1/2 in. corded drill m...	Skil	6445	XB4567	A0000C
		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	G0G-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.



1	A	B	C	D	E	F	G	H	I	J
	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Barcode	Category	Status	Loaned To
2	https://sh.1.25 HP MAX TORQUE COMPACT	The 450 includes Motor, Standard Base, Wrench, Porter Cable	450		0016000513693		Routers	Loaned	Wilson's Crew	
3	https://sh.1.25HP MAX TORQUE COMPACT	The 450PK includes Motor, Standard Base, Plung Porter Cable	450PK	-	1001		Routers	Available		
4	https://sh.1/2 in. Corded Drill	The powerful 7 amp 1/2 in. corded drill is the ide Skil	6335-01		0096619756803		Drills	Loaned	Tim's Crew	
5	https://sh.1/2 in. Hammer Drill	This powerful 7 amp 1/2 in. corded drill model 6 Skil	6445	XB4567	A000001		Drills	Loaned	Tim's Crew	
6	<a drill"="" high-speed="" href="https://sh.1/2">https://sh.1/2" High-Speed Drill	6.5-amp motor delivers 0-850 rpm for high spec Bosch	1013VSR				Drills	Loaned	Tim's Crew	
7	<a drill"="" high-speed="" href="https://sh.1/2">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	
8	<a drill"="" high-torque="" href="https://sh.1/2">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	
9	<a drill"="" handle="" href="https://sh.1/2" keyed="" mid="" vsr="">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	
10	<a 2="" hammerdrill"="" href="https://sh.1/2" speed="" vsr="">https://sh.1/2" VSR 2 SPEED HAMMERDRILL	The PC70THD includes PC70THD, Chuck key and Porter Cable	PC70THD				Drills	Loaned	Virtual - Truck	
11	https://sh.1/4 SHEET ORBITAL FINISH SAND	The 380 includes Sander, Operating manual, Pap Porter Cable	380				Sanders	Loaned	Virtual - Repair	
12	https://sh.1/4 Sheet Palm Sander	This pressure control random orbit sander is the Skil	7292-02				Sanders	Loaned	Repair Bin	
13	https://sh.10 In. Compound Miter Saw with	Compact yet powerful, this 10 in. miter saw is an Skil	3316				Benchtop	Loaned	Wilson's Crew	
14	https://sh.10 In. Compound Miter Saw with	Compact yet powerful, this 10 in. miter saw is an Skil	3317				Benchtop	Loaned	Tim's Crew	
15	https://sh.10 In. Drill Press with Laser	Make precise holes and accurately drill with this Skil	3320				Benchtop	Loaned	Wilson's Crew	
16	https://sh.10 In. Table Saw with Fixed Stan	For bigger bolder projects, Skil table saws provic Skil	3310	-	13905		Benchtop	Loaned	Virtual - Repair	
17	https://sh.10 In. Table Saw with Folding Sta	For better results with bigger, bolder projects, Skil	3410				Benchtop	Loaned	Wilson's Crew	
18	<a dual-bevel="" glide="" href="https://sh.10" miter="" saw"="">https://sh.10" Dual-Bevel Glide Miter Saw	The innovation responsible for both the unique Bosch	CM10GD				Miter Saws	Loaned	Virtual - Tool Trailer	
19	https://sh.10" JOBSITE TABLE SAW	Includes table saw, rolling stand, 10-in blade15-a Porter Cable	PCB222TS		123456789		Table Saws	Loaned	Wilson's Crew	
20	https://sh.10" Wet Tile and Stone Saw	The TC10 is equipped with expanded rear and si Bosch	TC10	GGG-565			Tile Saws	Unavailable		

Helpful
Tips

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

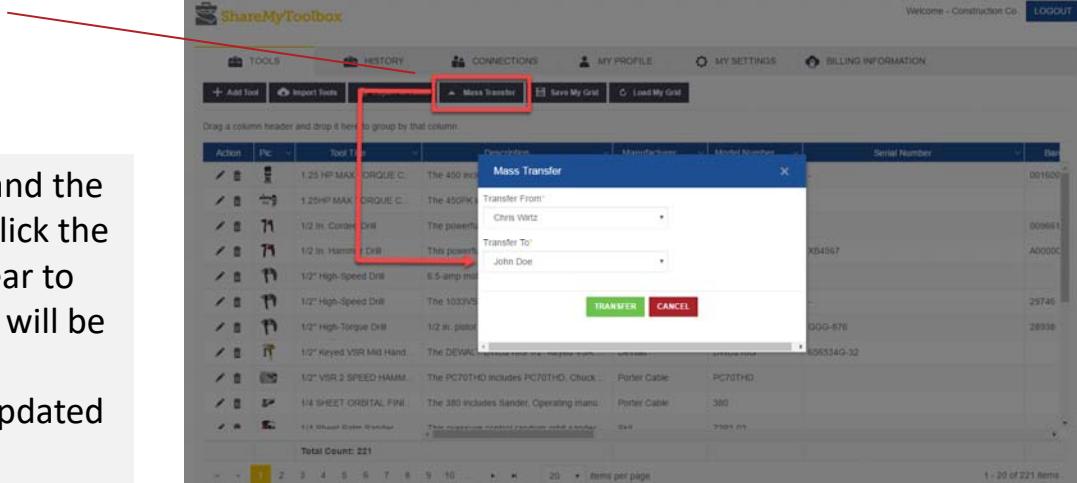
Workflow – mass transfer

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.

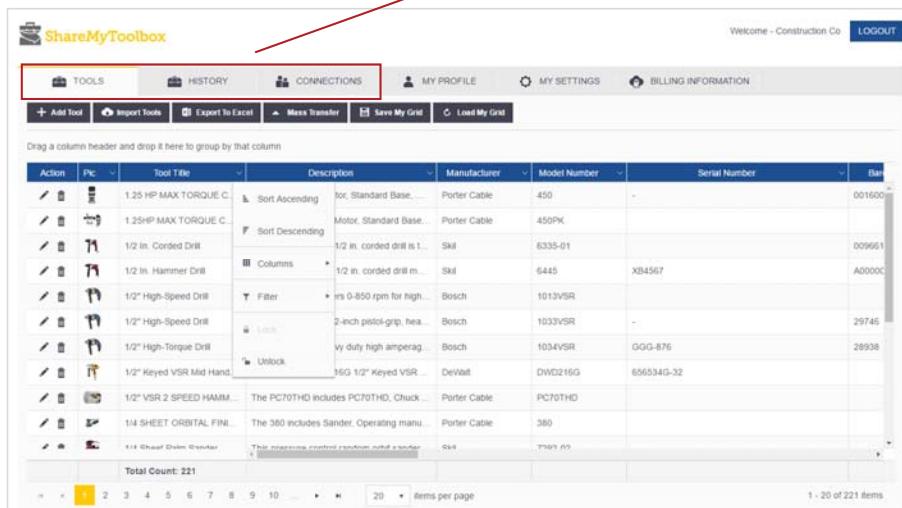
To use this feature, log into the enterprise version of SMTB and select the *Tools* tab. Click on the *Mass Transfer* button.

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.



Action	Pic	Tool Title	Description	Manufacturer	Model Number	Serial Number	Qty
1.25 HP MAX TORQUE C...		1.25HP MAX TORQUE C...	1.25HP MAX TORQUE C...	Porter Cable	450	-	001600
1.25HP MAX TORQUE C...		1.25HP MAX TORQUE C...	1.25HP MAX TORQUE C...	Porter Cable	450PK	-	001600
1/2 In. Cored Drill		1/2 In. Cored Drill	1/2 in. cored drill i...	Skil	6335-01	-	009661
1/2 In. Hammer Drill		1/2 In. Hammer Drill	1/2 in. cored drill m...	Skil	6445	XB4567	A0000C
1/2" High-Speed Drill		1/2" High-Speed Drill	1/2" High-Speed Drill	Bosch	1013VSR	-	29748
1/2" High-Speed Drill		1/2" High-Speed Drill	1/2" High-Speed Drill	Bosch	1034VSR	Q00-876	28930
1/2" High-Torque Drill		1/2" High-Torque Drill	1/2" High-Torque Drill	Bosch	1034VSR	Q00-876	28930
1/2" Keyed VSR M1 Hand		1/2" Keyed VSR M1 Hand	1/2" Keyed VSR M1 Hand	DeWalt	DW0216G	656534G-32	-
1/2" VSR 2 SPEED HAM...		1/2" VSR 2 SPEED HAM...	The PC70THD includes PC70THD, Chuck...	Porter Cable	PC70THD	-	-
1/4 SHEET ORBITAL FIN...		1/4 SHEET ORBITAL FIN...	The 360 includes Sander, Operating manu...	Porter Cable	360	-	-
1/4" Sheet Drywall Sander		1/4" Sheet Drywall Sander	This item includes a sander, 1/4" sander...	Porter Cable	360	-	-



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.

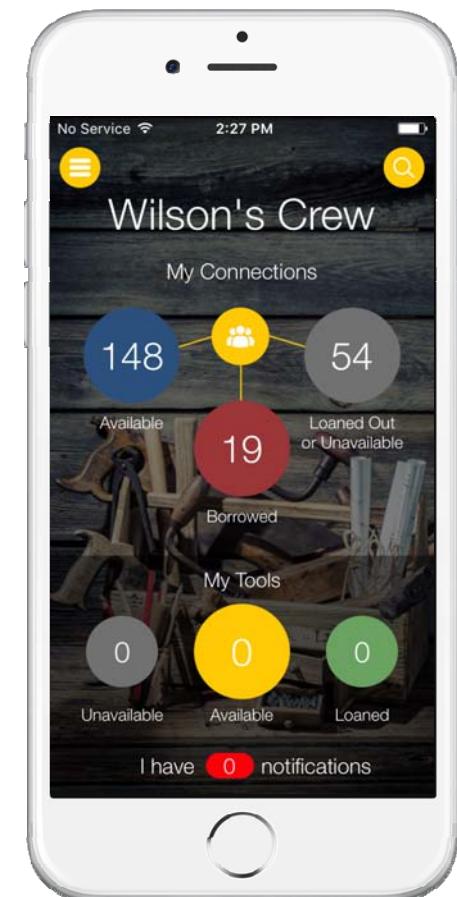
Mobile

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.

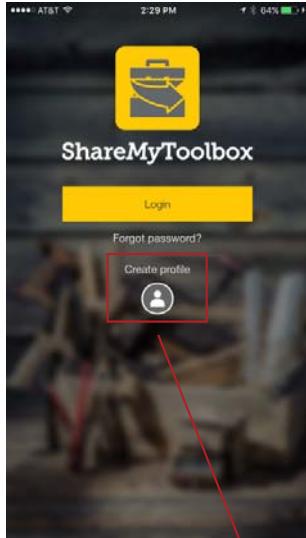
In accordance with our philosophy of designing ShareMyToolbox as a “mobile authentic” application, the mobile component was designed with a richer user experience than the web interface, which was intended for administrative and reporting functions. The mobile device was optimized for workflow and other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

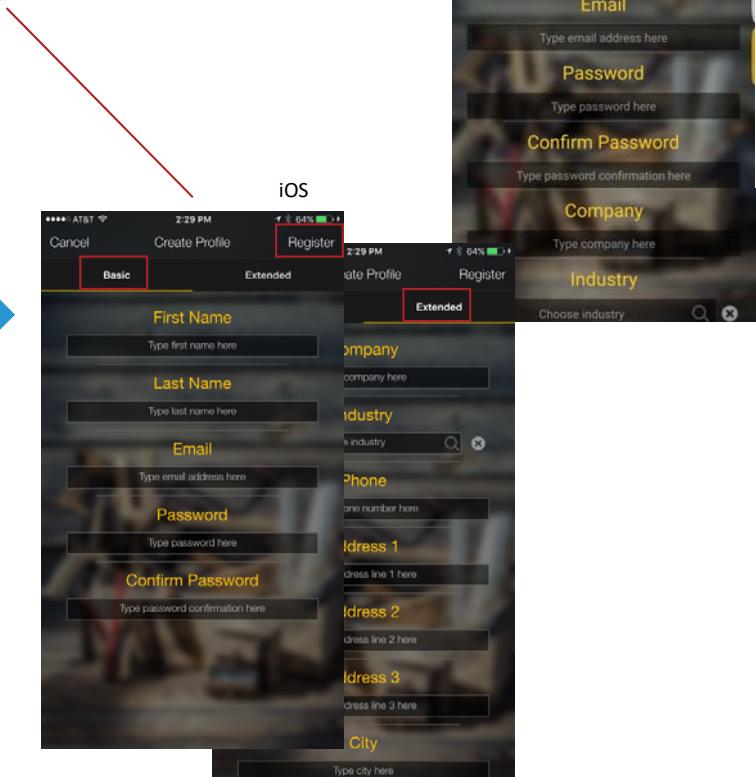


See Editing Your User Profile for a complete description of all fields.

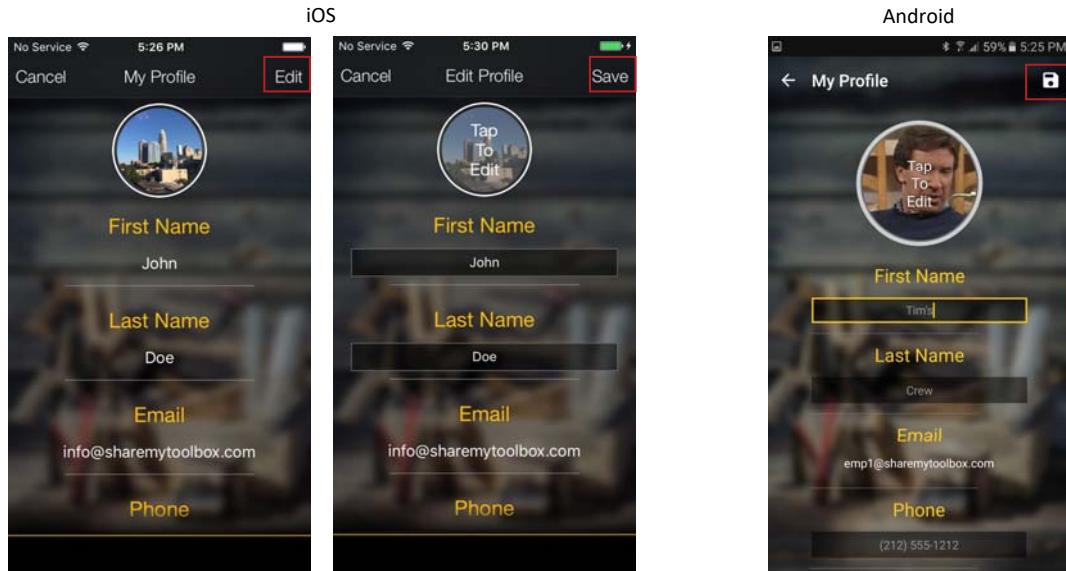
If you are a new user on ShareMyToolbox, after you download the application and click on the SMTB menu icon, you will see a log in screen. Click on the *create profile icon* and you will go to the *Create Profile* screen.



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



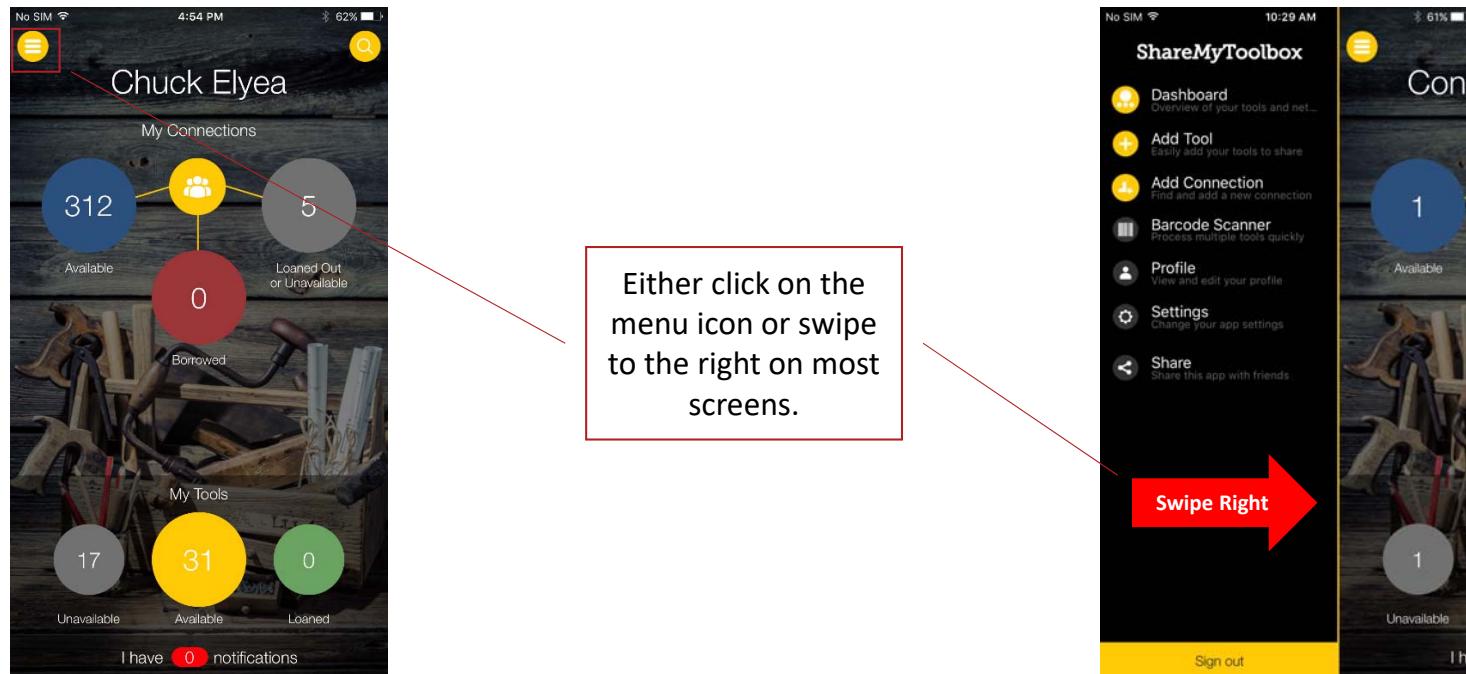
From the main menu, click on *Profile*. Your current profile will display. Click *Edit* on the top right of the screen. Click on the fields you wish to edit – most are self-explanatory. Click *Save* (or the save icon for Android) to save your changes.

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

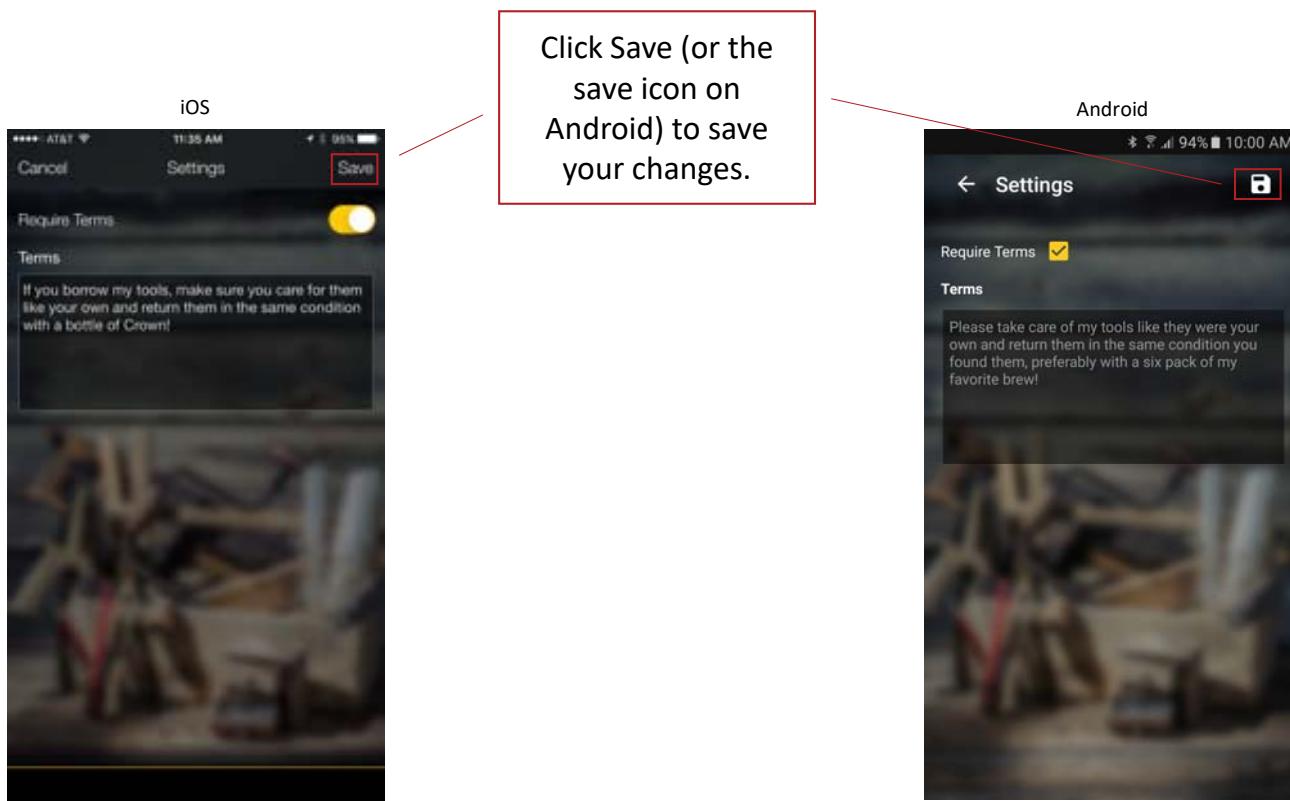
Menu

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.



Settings

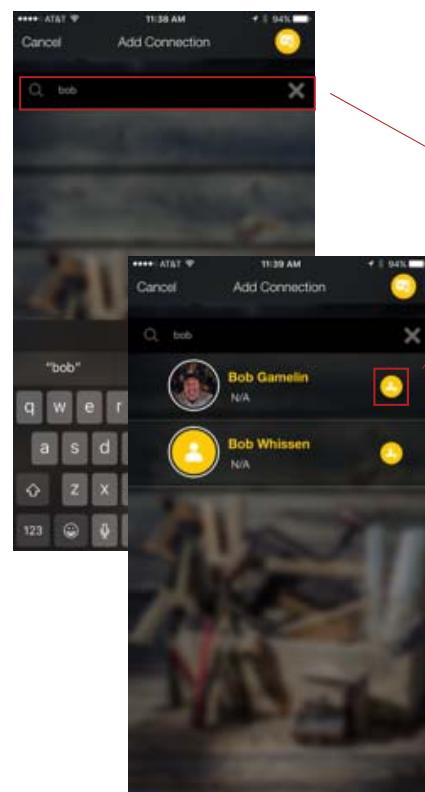
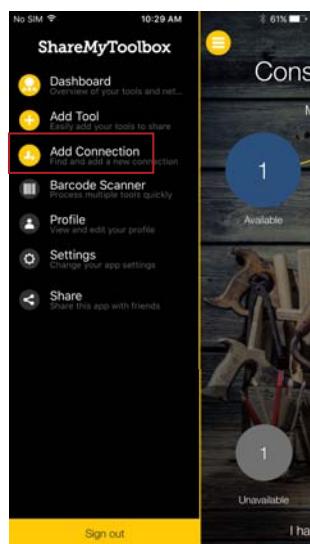
Settings on the mobile device are limited to loan terms. Select Settings from the main menu. If you wish to display loan terms with the tool, slide the bar to require terms. If you select to require terms, you will enter terms text. This does not require acknowledgement by a borrower, but it does let 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.

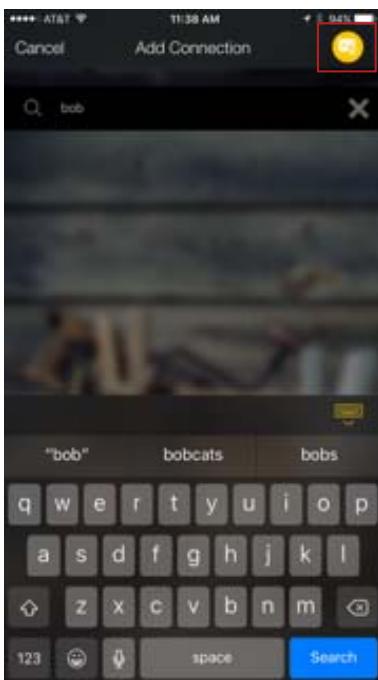
To add a connection, go to the main menu and click *Add Connection*. You can connect with existing ShareMyToolbox users or invite new ones to download the app and then connect.



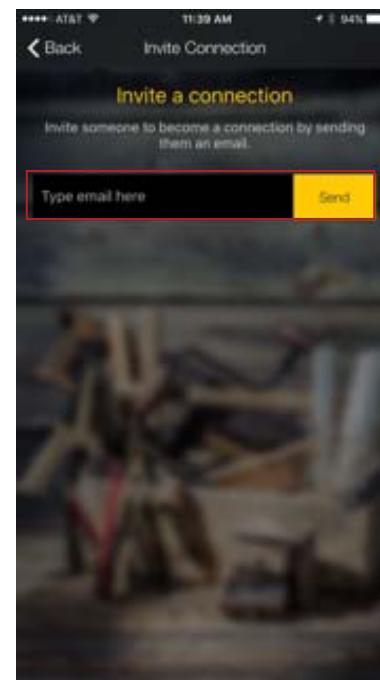
To search for **existing users**, type all or part of a name in the search field and click *Search* on the keyboard. It's helpful if the connection entered a picture or city/state in their profile, otherwise, it may be difficult to determine which Bob Smith you would like to connect with! To connect,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



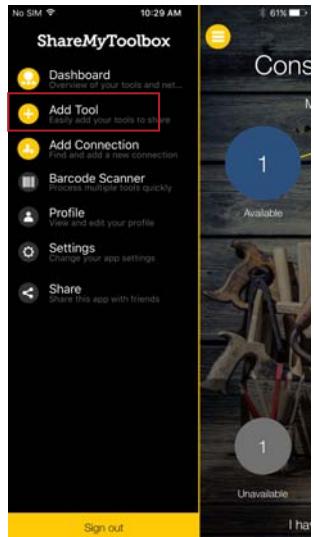
If a potential connection has NOT established a profile in ShareMyToolbox, click the *invite* icon in the top right of the *Add Connection* screen and type their email address.



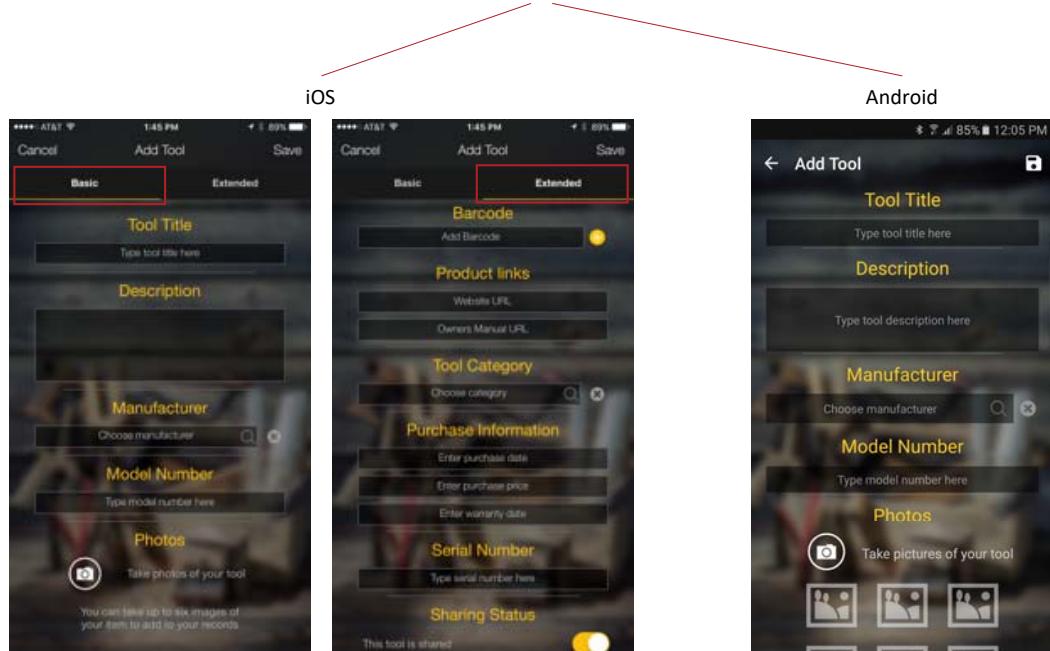
ShareMyToolbox will generate an email invitation with your mobile device's default email provider which you will be able to edit before sending.

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.



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

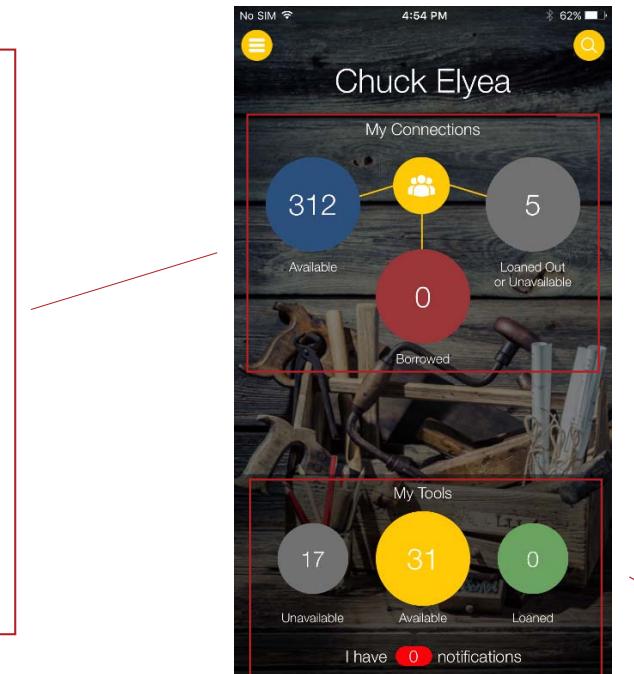
Tool Title	Short tool description and the only required field to set up a tool.
Description	Long Description. This field will hold far more text than displayed here.
Manufacturer	Click on the Manufacturer field to display a default list of 100+ of the top tool manufacturers. Type a company in the search 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:

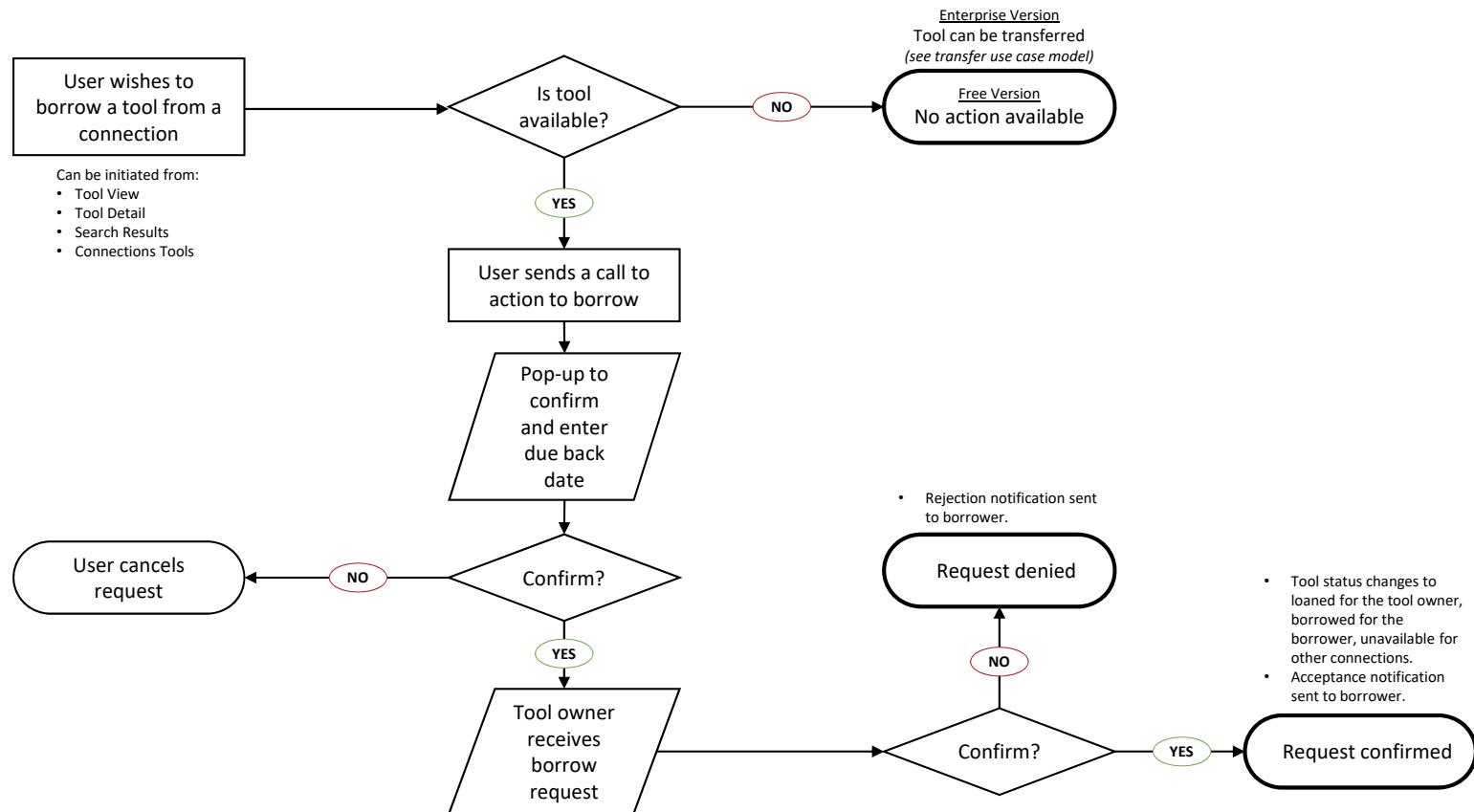
- Yellow: Your available tools
- Blue: Connections' available tools
- Green: Your loaned tools
- Red: Your borrowed tools
- Grey: Your tools marked non-shared; your connections' tools loaned; any tool marked unavailable

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

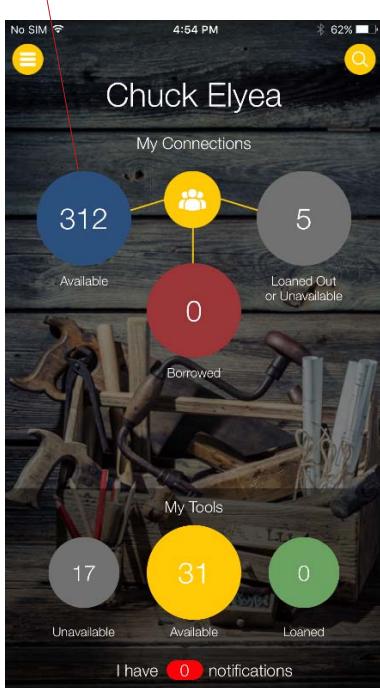
The borrow workflow is illustrated below.



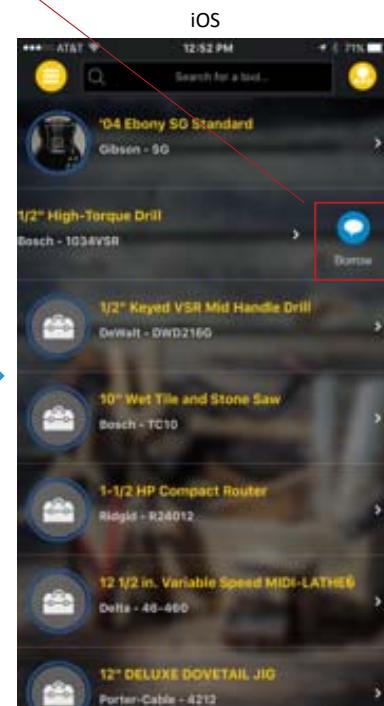
Workflow – borrowing a tool on the summary tool view

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

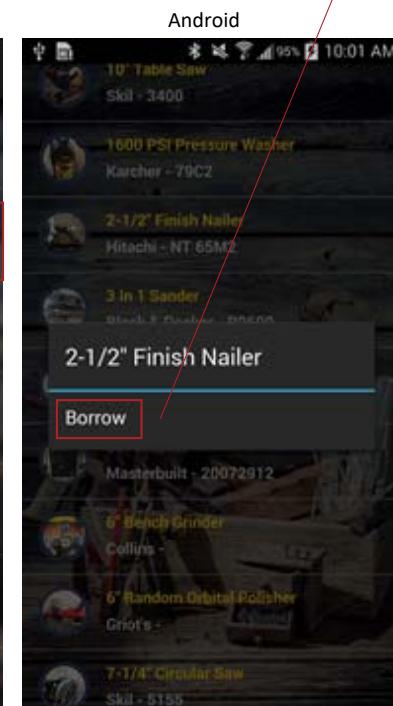
From the dashboard, clicking on the *blue button* will display the tool view for connections' available tools.



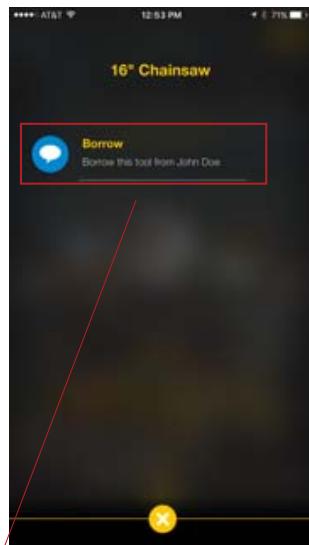
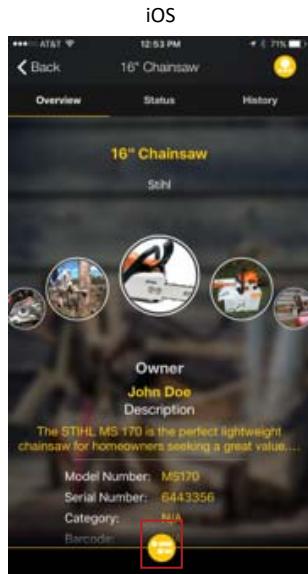
Swipe left on the tool you wish to borrow and a borrow icon will display.



On Android devices, long press on the tool.



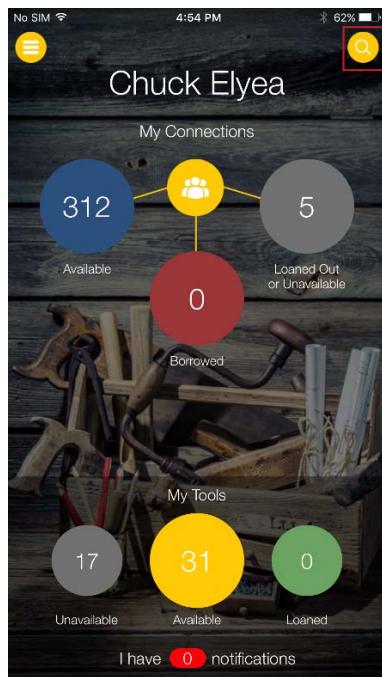
Workflow – borrowing a tool on the detail tool view



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.

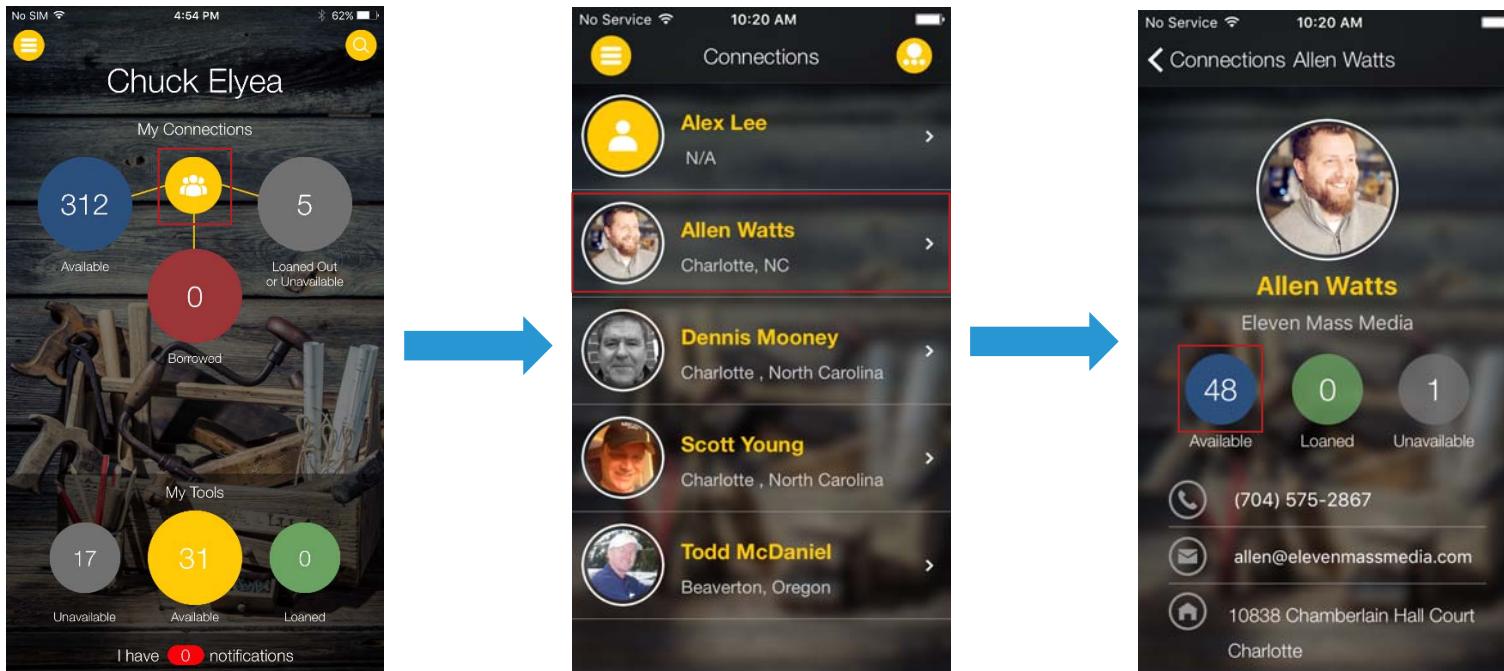
Workflow – borrowing a tool from search results



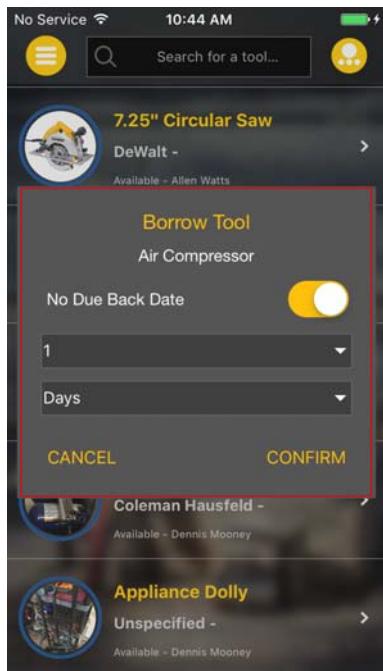
From the dashboard, click on the *search icon* (magnifying glass). From the search results, the process will be the same as borrowing a tool on the *Tool Summary View*.

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



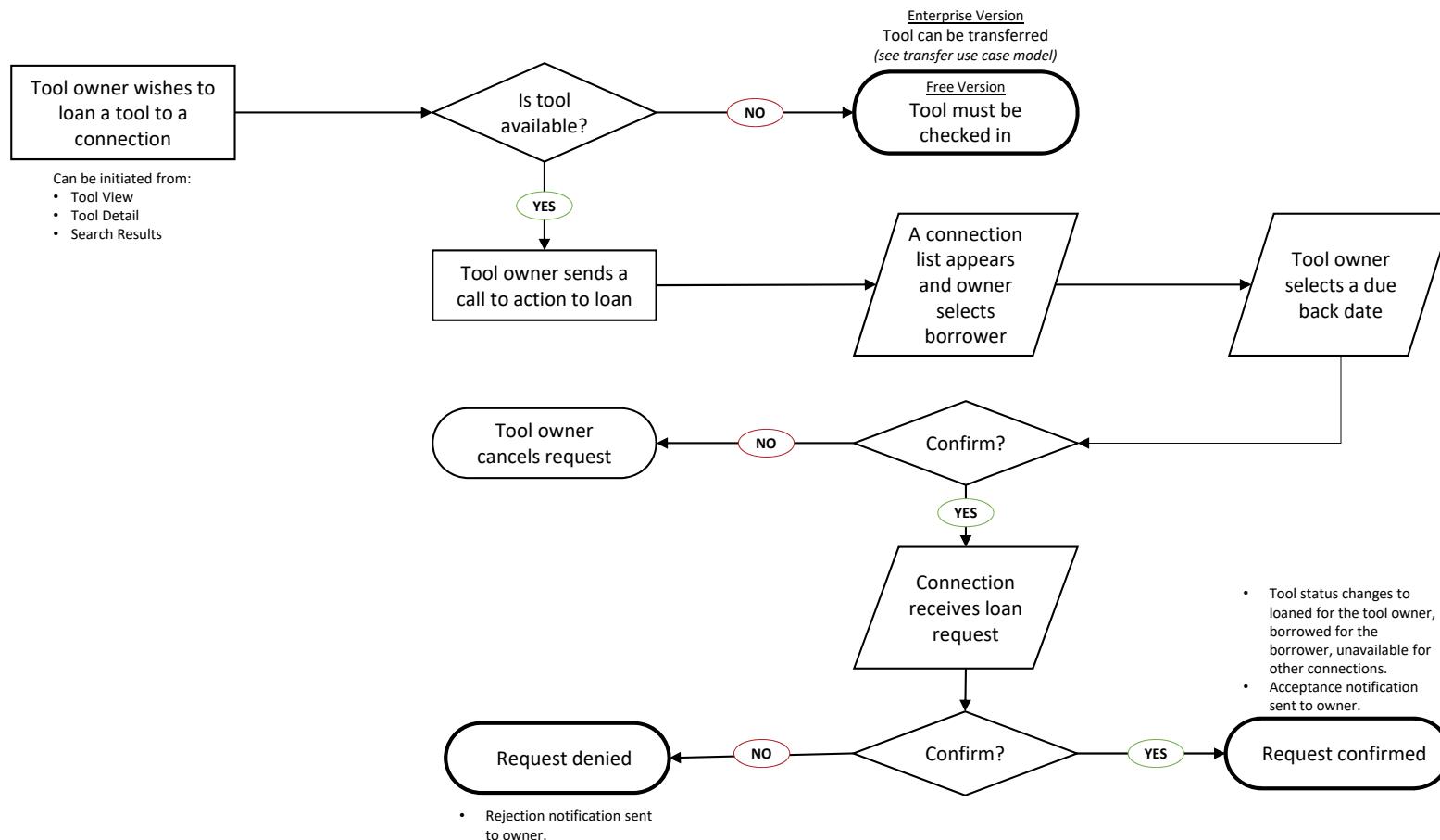
After the borrow (or loan) action is initiated, a dialog will appear to select how long the tool is needed.

- 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.

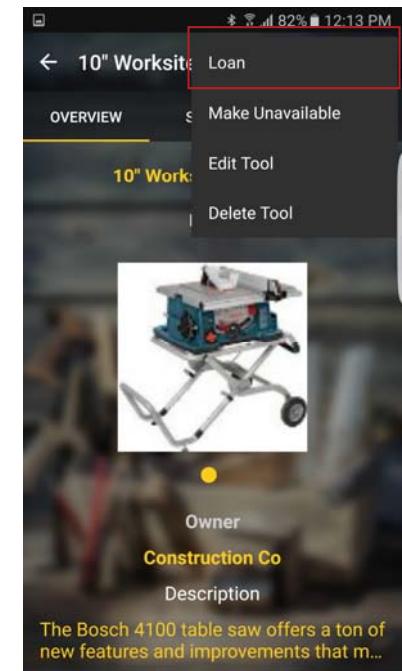
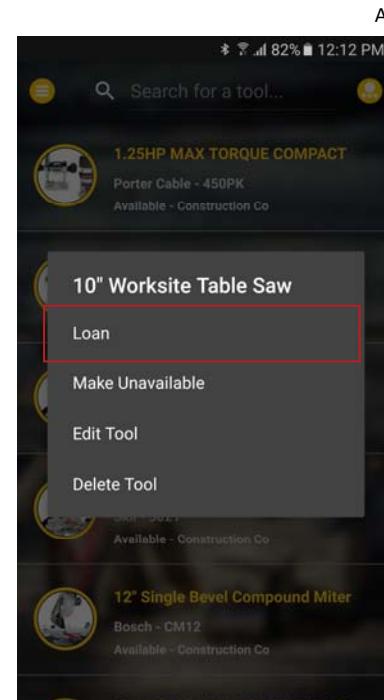
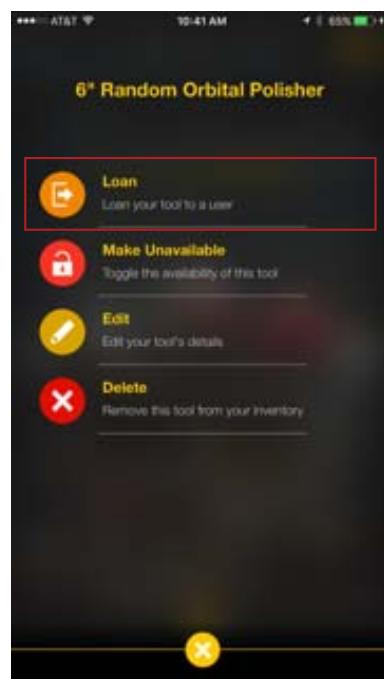
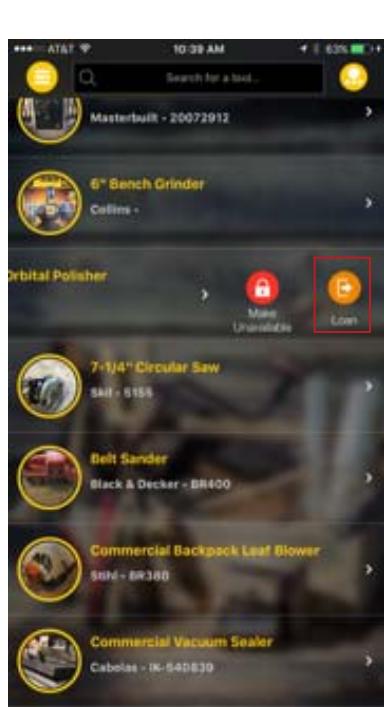
Workflow – loaning a tool

The loan workflow is illustrated below.



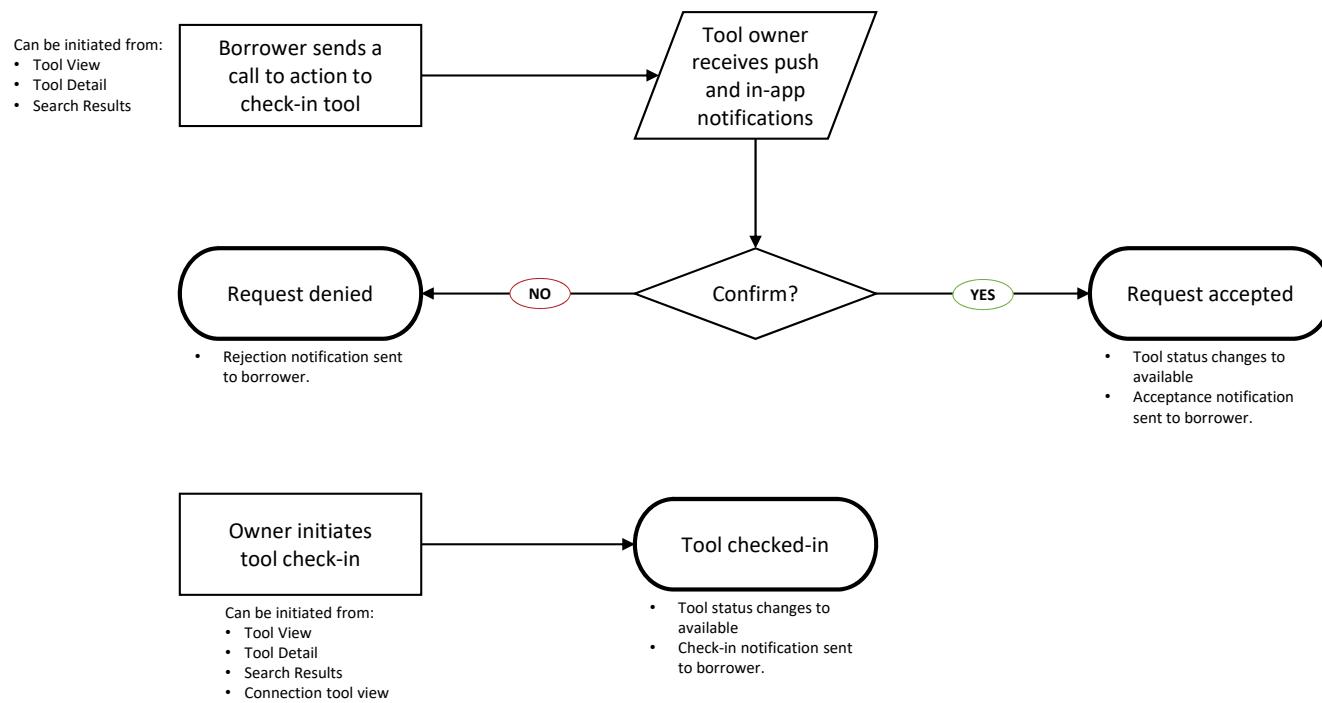
Workflow – loaning a tool

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*.



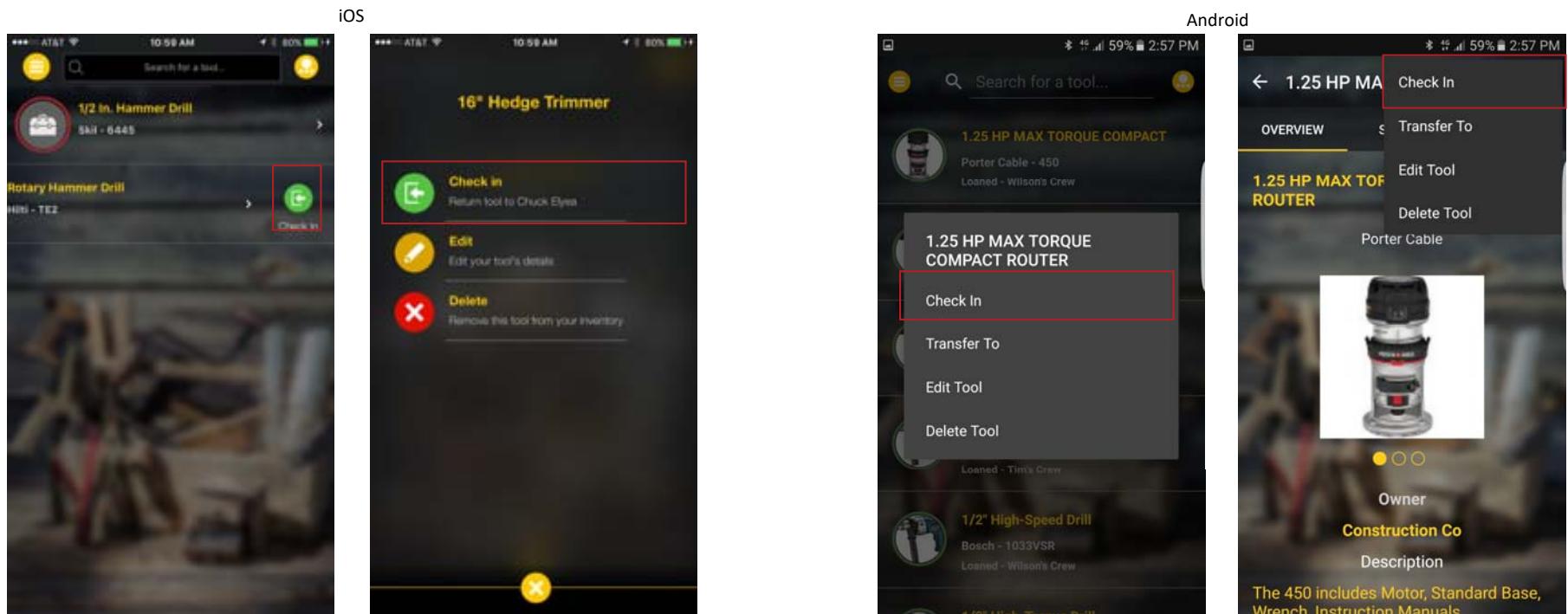
Workflow – checking in a tool

The check in workflow is illustrated below.



Workflow – checking in a tool

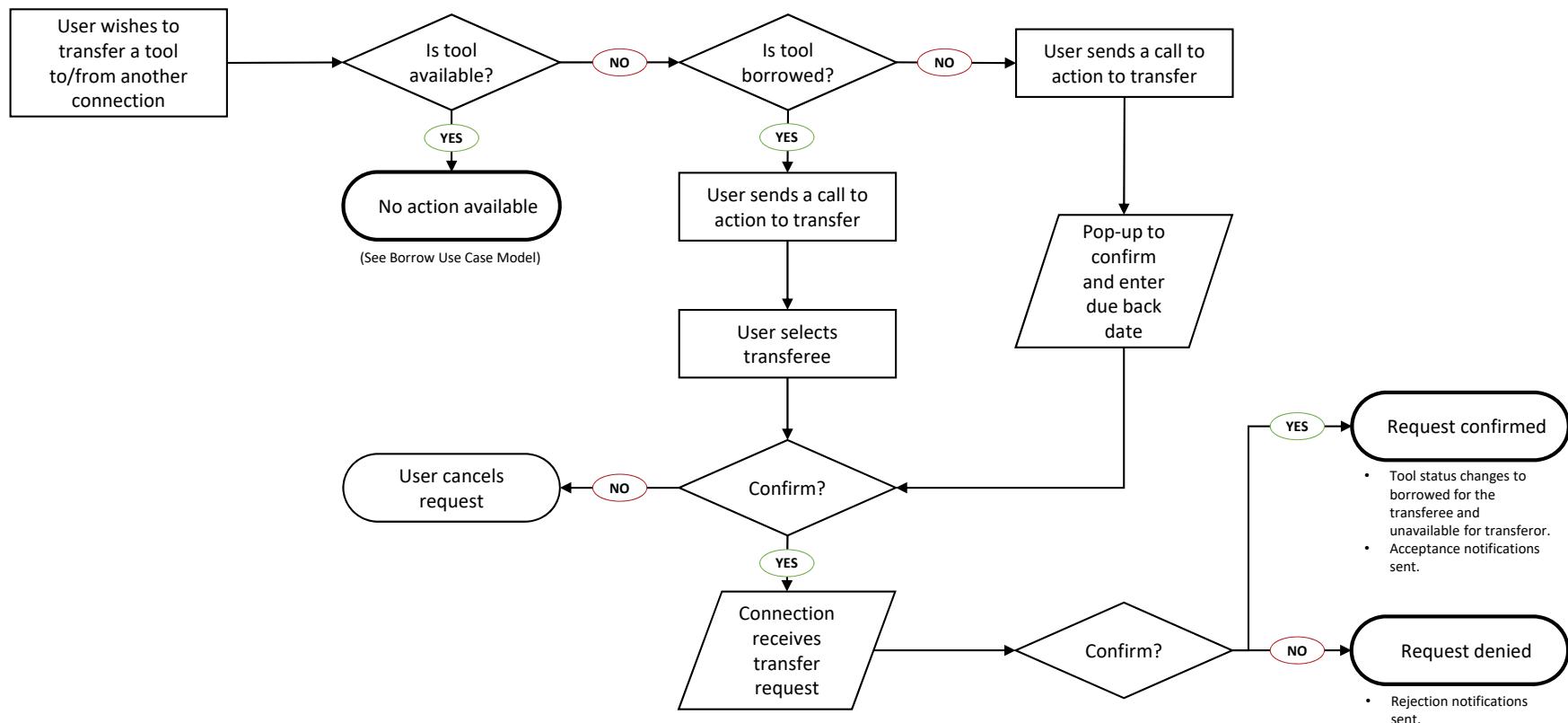
Either a borrower or lender can initiate the check in process from either a *Tool Summary View* or *Tool Detail View*. From a *Tool Summary View*, swipe left and the check in icon will display. From a *Tool Detail View*, press the *action icon* at the bottom and an action view will display a *check in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



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.

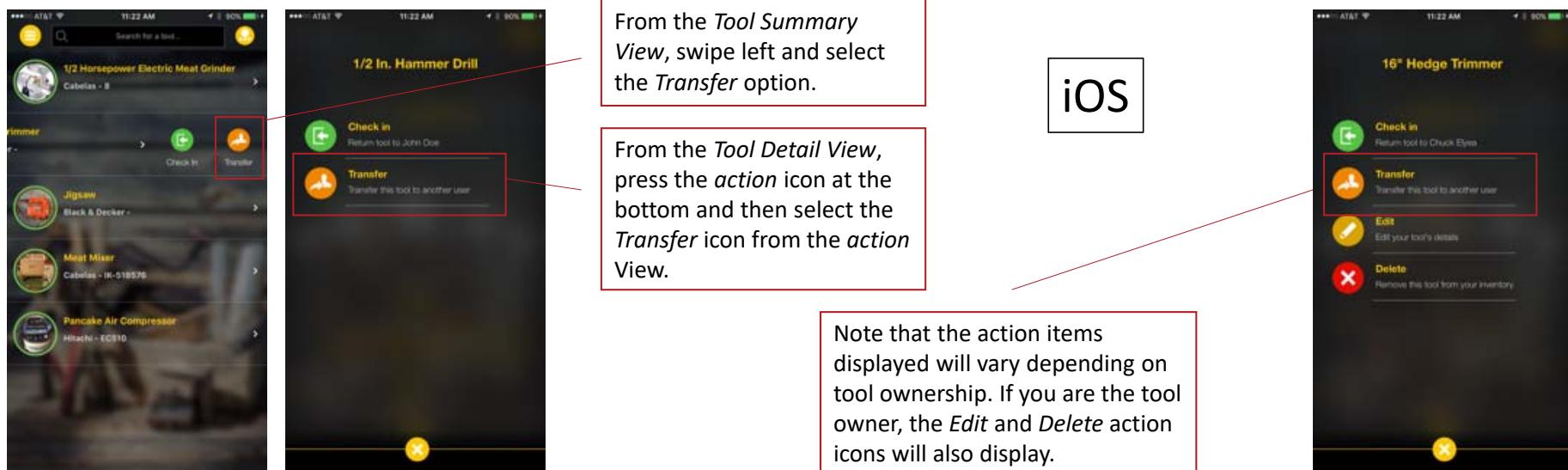


Workflow – transferring a tool

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

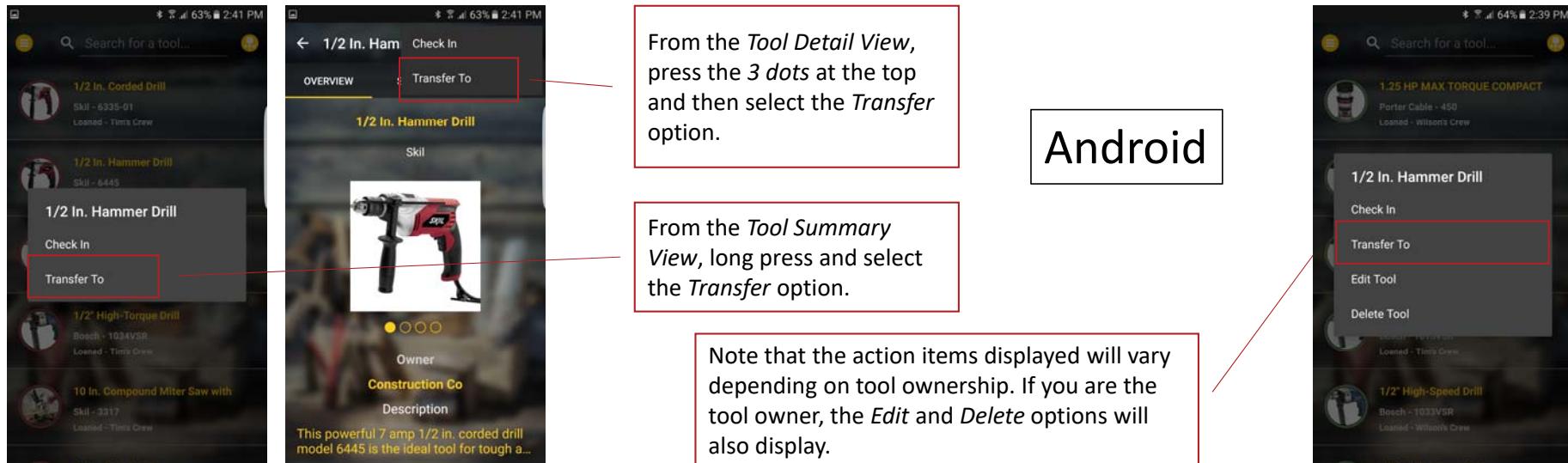
The transfer option will display on both the *Tool Summary View* and *Tool Detail View* for any tool owned by an enterprise user with a status other than available. (If the status is available, the tool can be loaned or borrowed).



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.

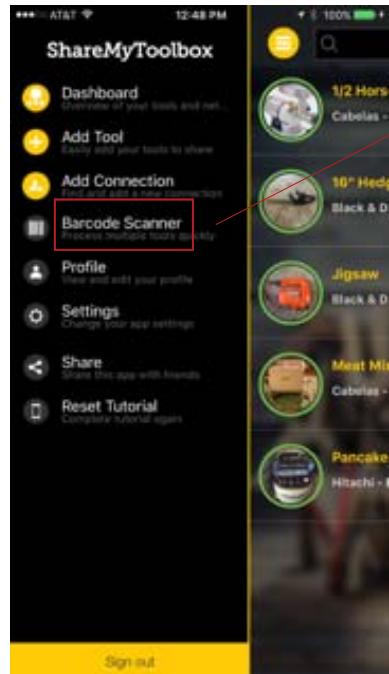


Workflow – barcoding

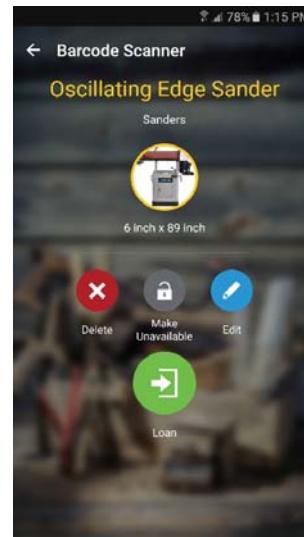
Review *Add Tools* before using the barcode option. For enterprise users that have many tools, the barcode option is a quick way to loan or check in a tool.



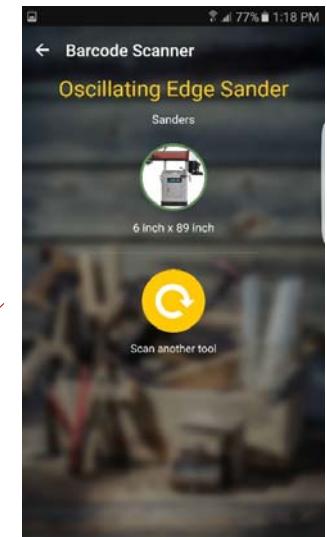
Non-enterprise users will see the barcode feature, but will not be able to add a barcode to the tool record. However, they will be able to scan barcodes and search for enterprise connections' tools that match the number retrieved.



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



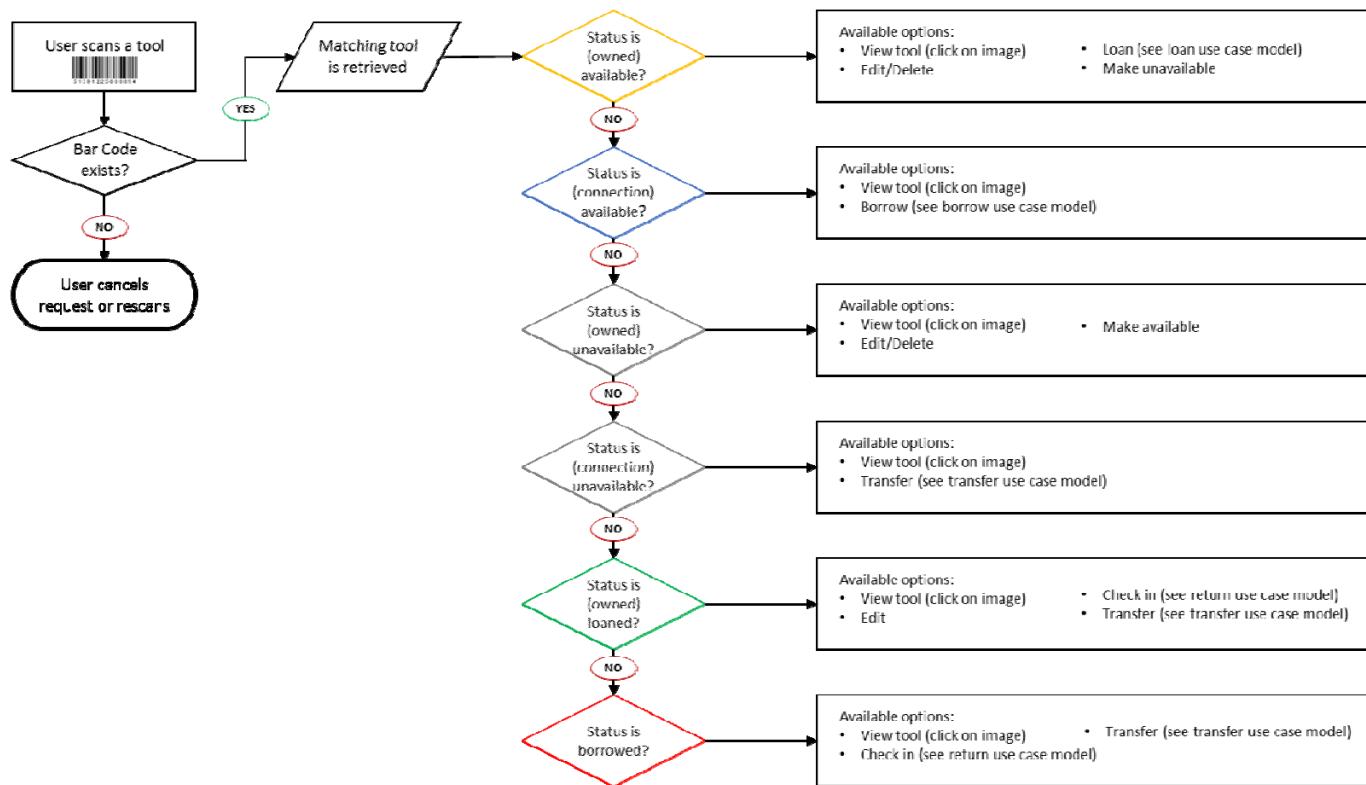
Scan the tool's barcode. The tool matching the barcode will display.



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

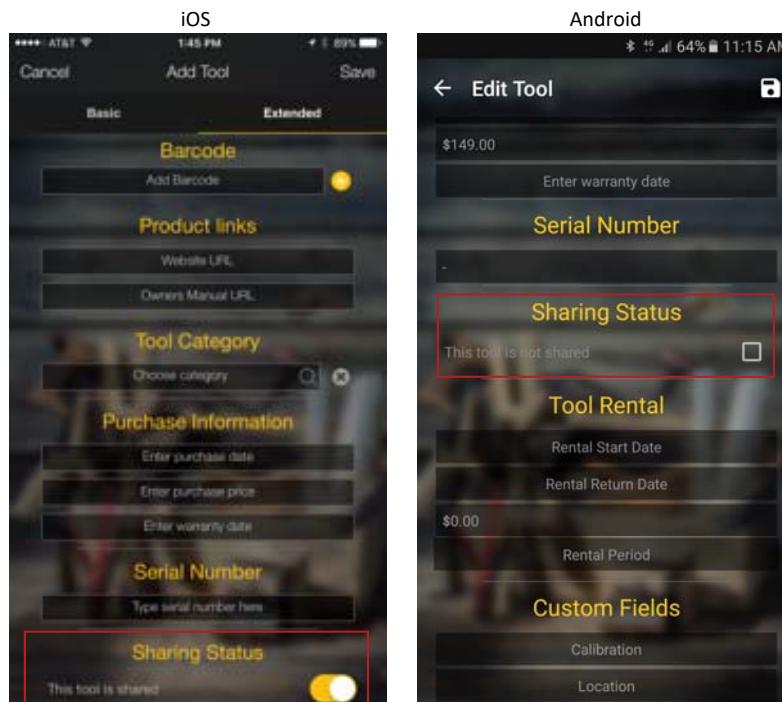
The action items displayed will depend on the tool status. For example, if the tool has an available status and an administrator is scanning a company-owned tool, *Loan* will display. Conversely, if the status is loaned and an administrator is scanning the tool, *Check In* will display. Review the workflow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



Workflow – making a tool unavailable

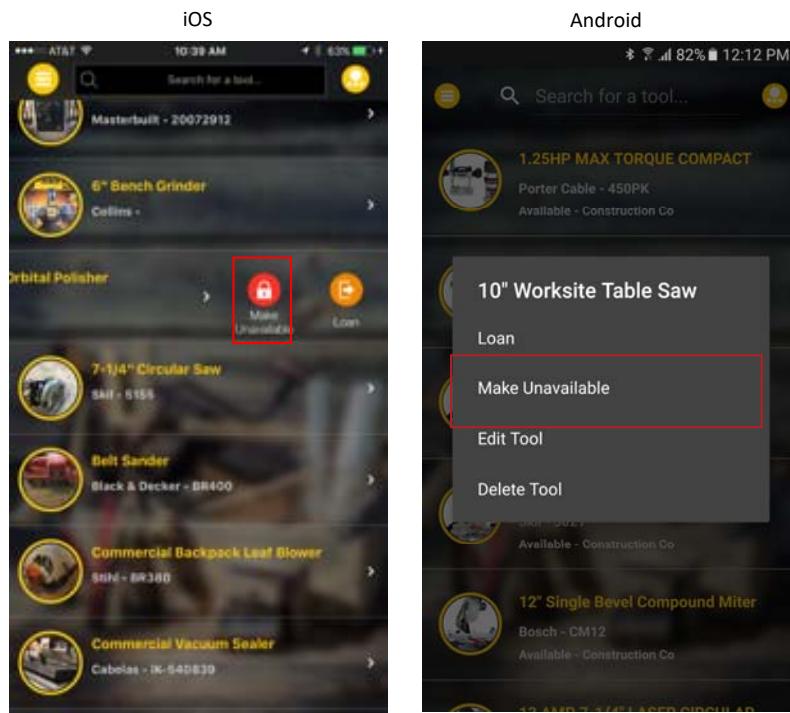
There are two ways to make a tool unavailable with each used for different reasons:

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

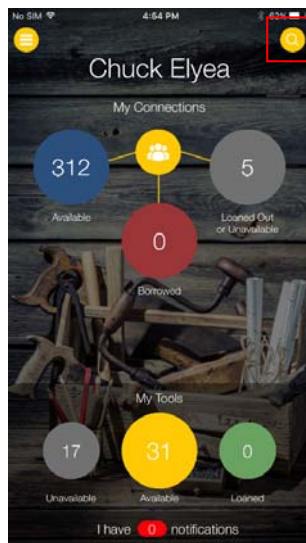
2. Unavailable – If you are the tool owner and the status is available (yellow), swipe left on the *Tool Summary View* and select the *Make Unavailable* action icon (iOS). On Android, long press on the *Tool Summary View* and select the *Make Unavailable* option. The tool will remain visible to connections,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



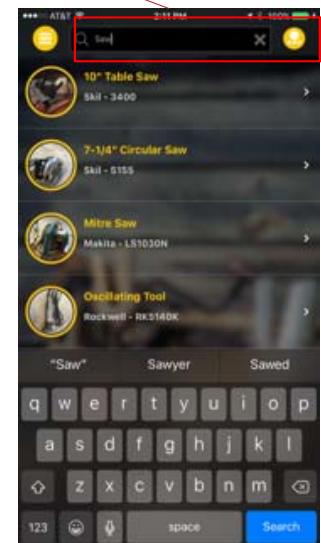
Search

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.

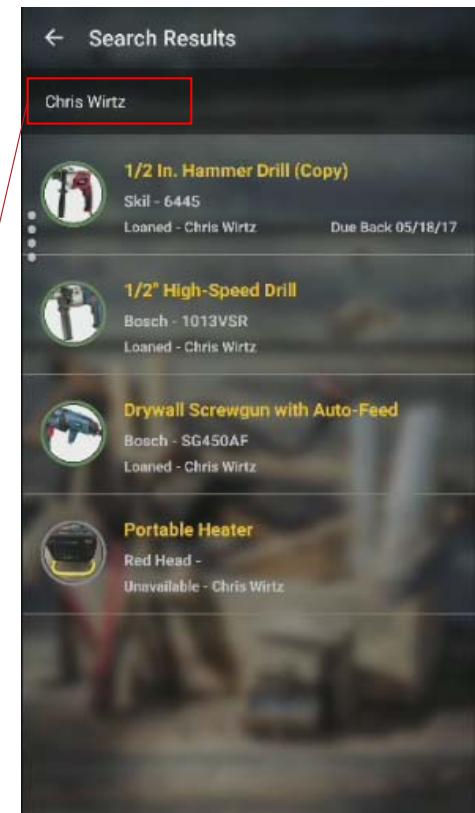
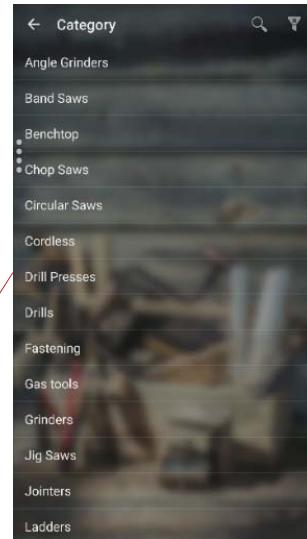
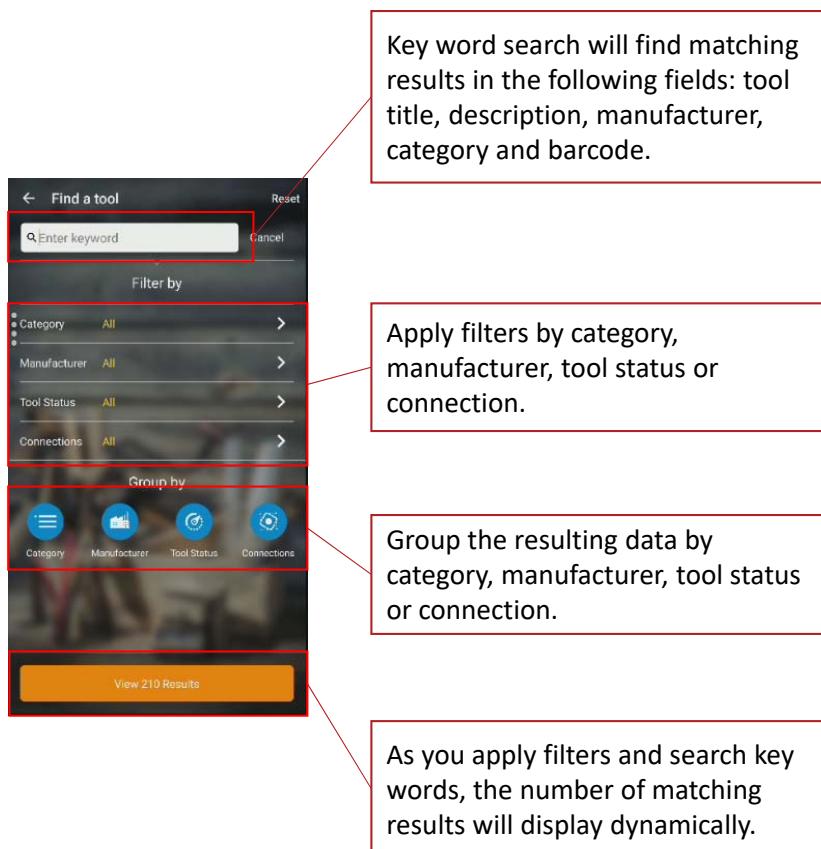


From any *Tool Summary View*, enter a text string in the search box for a “best fit” search. It’s not necessary to press the search button on the keyboard.



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

Search



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