

GETTING STARTED WITH

TOOLWORKS

Total Control Over Your Tool Inventory

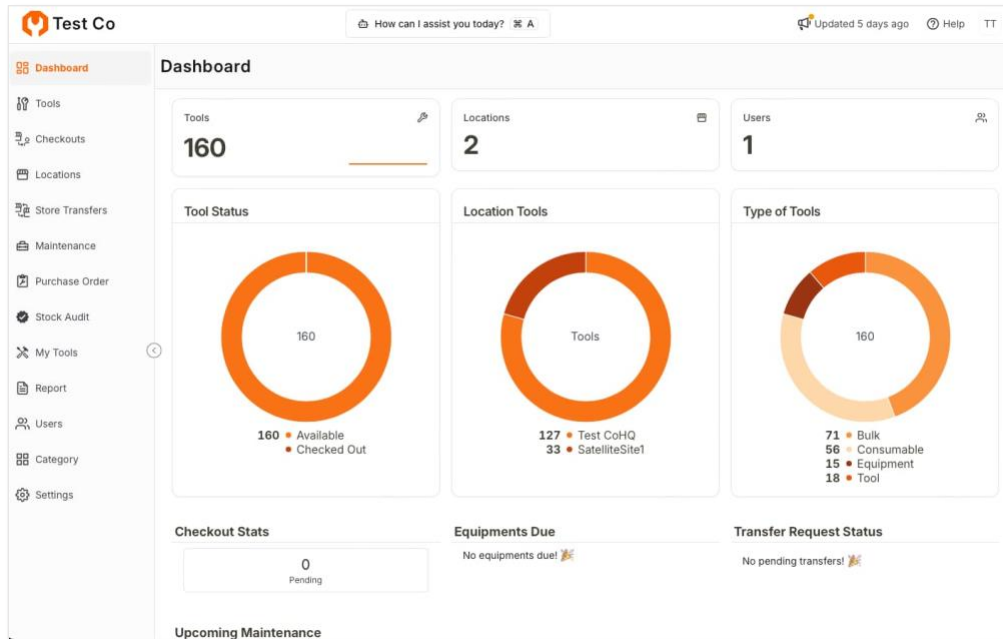
Getting Started Guide

This guide will walk you through the steps to get started with ToolWorks. We will cover following topics:

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1. First Look

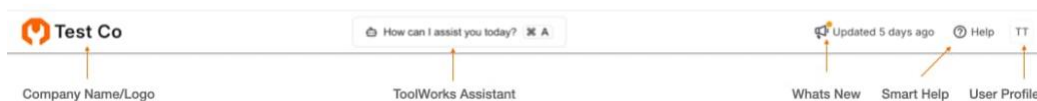
When you visit ToolWorks for the first time, you will see the following:



It can be broken down as follows:

1. The Top Bar
2. The Side Navigation Bar
3. The Dashboard

1.1 Top Bar

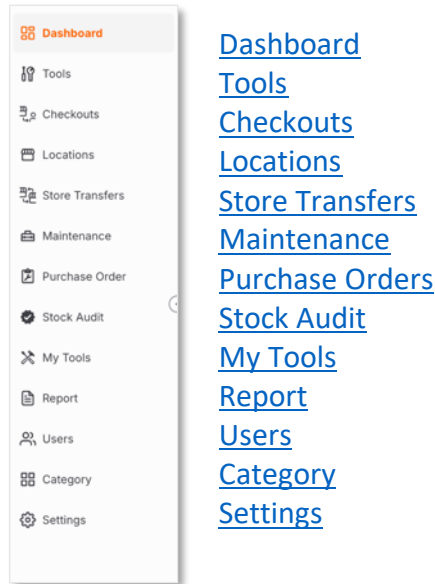


Top Bar is composed of the following:

- **Company Logo/Name:** You can customize Company Name and Logo using the **Settings** page. (Settings [Shift-Ctrl-s] > Account).
- **Assistant:** Launch AI Assistant from anywhere. [⌘/⌃ + A]
- **Updates:** See what's new in ToolWorks
- **Help:** Get Smart Help for any page using [Shift-h]
- **Profile:** See Your profile details [Shift-Ctrl-p]

1.2 Navigation Bar

A convenient way to navigate to all the major modules. Navigation Bar is composed of the following:



1.3 Dashboard

Dashboard provides with at-a-glance information regarding stats for Tools, Location, Users. Shows break down on total inventory by Status, Location, and Type.

Real-time information for Checkout, equipment due and upcoming maintenance. Timely reminders to restock consumables. And allows you to keep track of your tool inventory with insightful stats and direct links.

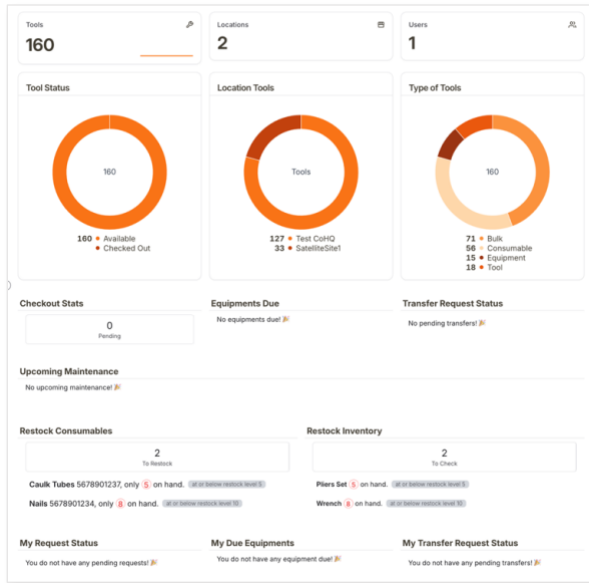
[Learn More](#)

*Dashboard includes following **Widgets**:*

- **Tools:** Shows total count of tool inventory.
- **Locations:** Shows total locations in your company.
- **Users:** Shows total users in the system.

- **Tool Status:** Shows total count of tool inventory by status, available, checked out, in transit, etc.
- **Location Tools:** Shows total count of tools in each location.
- **Type of Tools:** Shows total count of tools by type, tool, equipment, consumable, and bulk.

- **Checkout Stats:** Show total count for tool checkout orders by status, like Pending, Ready, Completed, etc. Click on a Stat to see checkout orders for that status.
- **Equipment Due:** Show total count for equipment due, past due, due today and next due. Below stats you will find list of tools that are past due or due today, with direct link to checkout order.
- **Transfer Request Status:** Shows total count for tool transfer orders by status, like Pending, Ready, Completed, etc. Below stats you will find list of ready store transfers with direct link to store transfer request.



- **Upcoming Maintenance:** Show total count for tool maintenance work orders, past due, due today and due soon. Below stats you will find list of tools, with direct link to maintenance order.
- **Restock Consumables:** Show total count for consumable that need restocking. Below stats you will find list of consumables that need to be restocked.
- **Restock Inventory:** Show total count for bulk items that need restocking. Below stats you will find list of individual items that need to be restocked.
- **My Request Status:** Shows count of tool requests that you have made to get tools grouped by status, like Pending, Ready, Completed, etc. Below that you will find link to list of requests that are Ready for pickup.
- **My Due Equipment:** Show total count for your equipment due, past due, due today and due son. Below stats you will find list of tools that are past due or due today, with direct link to checkout order.
- **My Transfer Request Status:** Shows total count for your tool transfer request by status, like Pending, Ready, Completed, etc. Below stats you will find list of ready transfers with direct link to your transfer request.

2. Introduction to Asset Items

Tools are items or assets that you want to track and manage. They can be anything from tools to equipment to consumables. In order to get a comprehensive view of what you own, how they are used and cost of it, you should track all items and supplies, not just a few selected high costs one!

2.1 Inventory Types

Inventory of items is classified based on type of asset. There are 4 different types in ToolWorks: Tools, Bulk Items, Consumables, and Equipment.

Tools:

Tools are items that you want to track and manage individually. Each will have its own unique barcode or asset tag. They are usually assigned for long duration, and are required to be returned. Example: Hammer Drill, Miter Saw.

Tools are check out to user, transferred to job site, checked in, maintained, purchased, audited, etc.

Bulk Items:

Bulk items are tools that are tracked in bulk rather than individually. Instead of each item having unique barcode, all items in the group have same barcode or asset tag. They are less valuable than Tools, but you still want them to be returned. Example: Shovels, Chairs

Just like Tools, Bulk Items are checked out to user, transferred to job site, checked in, maintained, purchased, audited, etc.

Consumables:

Consumables or materials(supplies) are items that are consumed over time and permanently removed from the stock count once utilized. Like Bulk items, Consumables are tracked as a group rather than individually, and are not required to be returned. Example: Welding Rods, Water Bottles.

Consumables are checked out to user, transferred to job site, purchased, audited, etc.

Equipment:

Equipment are assets that are tracked individually like Tools, but unlike tools (which are given out for long duration), they have a fixed duration for which they are reserved. Example: Forklift, Scissor lift.

Equipment is reserved, transferred to job site, checked in, maintained, purchased, audited, etc.

2.2 Adding Tools

Let's add a Tool:

1. Navigate to the **Tools** tab. [shift-t]
2. Click the **Add Tool** button.[ctrl-a] (top-right corner)
3. Upload, drag and drop or Snap Photo of tool you want to add, ToolWorks AI Vision will process the photo and generate tool details. Tool details are shown to verify and edit.
4. Click **Add** to save the new tool.

When adding a tool, you only need to enter *tool name, barcode*. You can optionally enter other details as required, like Inventory Type, Manufacturer, Model, Location, Category etc.

You can also create a Tool Kit to group/bundle related tools together. When adding tool, just set ``Is Kit`` to true.

ToolWorks automatically groups tools based on the tool name. This grouping allows you to easily see how many tools of same type are in the inventory.

2.3 Bulk Upload

Bulk Upload allows you to upload a CSV file with tool details. You can download template file from **Tools > Bulk Upload**. You only need three pieces of information: Tool Name, Barcode, and Inventory Type. Please check this [CSV Field Details](#) to understand the fields and how they are used.

To Upload:

1. Navigate to the **Tools** tab. [shift-t]
2. Click **Bulk Upload** and select CSV file to upload or drag and drop the file.
3. View the parsed file. Once you are satisfied with the data, click **Upload**.

Bulk Upload is great way to enter lots of tools and auto generate all the related fields. Upload will *auto create* Locations, Category/Sub Category and Vendors.

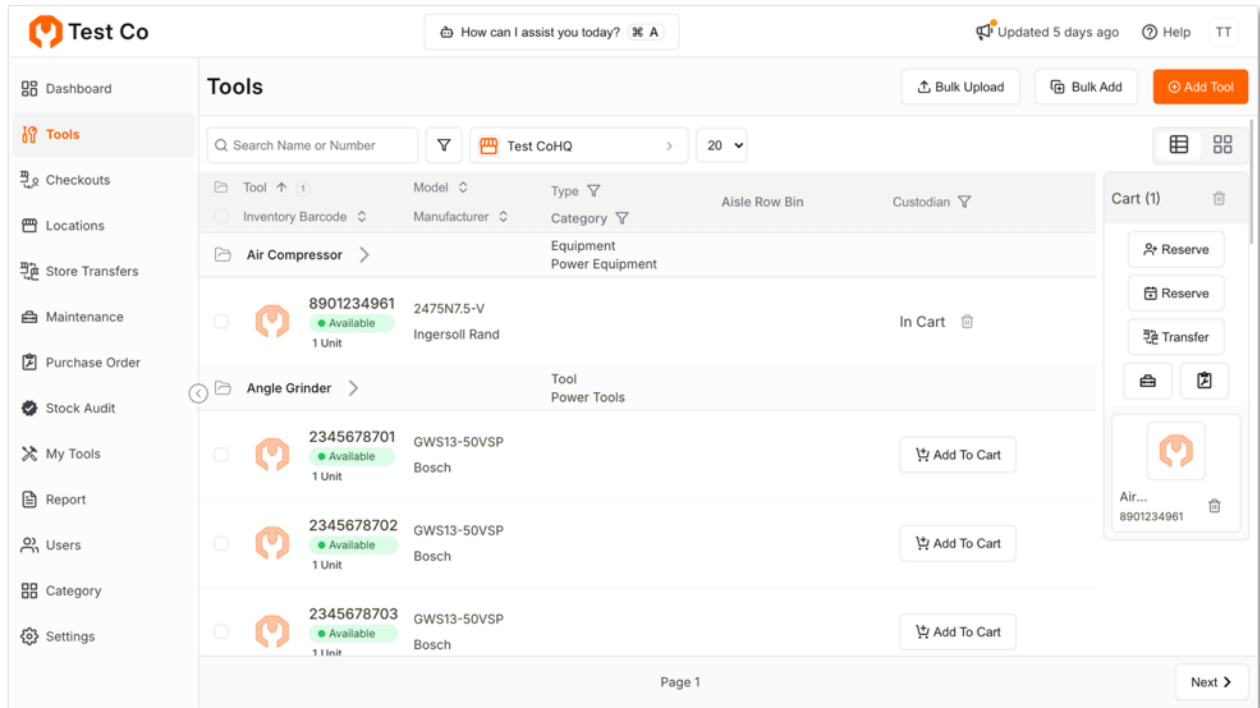
When you receive a shipment containing multiple units of the same tool, you can utilize [Bulk Add](#) feature to efficiently create records for each individual item.

Bulk Upload functionality is also available for:

- Location
- Users
- Categories
- Maintenance
- Checkout(assignment)

3. Take Action on Items

You can quickly take actions like Assign, Reserve, Transfer, Check In, Request, Maintain, Purchase Order on Items all from the **Tools** tab. Just add desired items to the Cart using **'Add to Cart'** and then click the appropriate action button.



Here are some useful resources to help you understand what these actions are:

[Transfer tools to another store](#)

1. Navigate to **Tools** tab. [shift-t]
2. Find Tool and click **Add to Cart**, for all tools that need to be transferred
3. In the **Cart**, click **Transfer**, enter store details and click **Transfer** to transfer tool to another store.

[Assign Tools to Users](#)

1. Navigate to **Tools** tab. [shift-t]
2. Find tool and click **Add to Cart**. (Repeat for each required tool)
3. In the **Cart**, click **Assign**, enter user and click **Checkout** to assign tool custody to user.

[Check-In tools](#)

1. Navigate to **Tools** tab. [shift-t]
2. Find tools to check-in and click **Check In (->)** for each tool you want to check-in.
3. In the **Cart**, click **Check In**, enter user and click **Check In** to return tools.

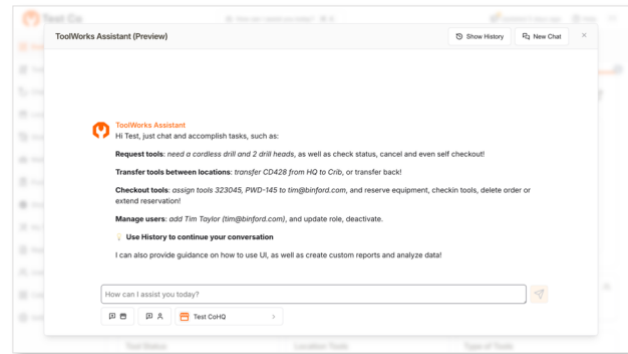
[Maintain tools](#)

4. AI Assistant

The ToolWorks Assistant is an AI-powered virtual teammate that revolutionizes how you interact with the system. Assistant allows you to manage your tools and equipment through simple, *conversational interactions* – just as if you are talking to a human colleague.

This means you can communicate with the assistant using your own words, without needing to learn specific commands or navigate different UI.

The Assistant can automate a wide range of tasks, including:

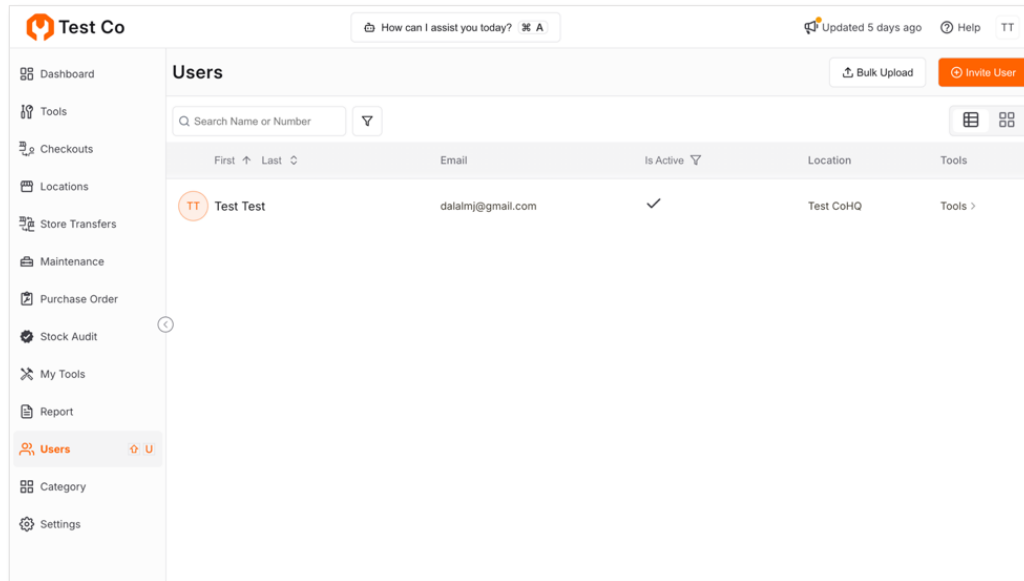


- Requesting tools and equipment
 - Need a hammer drill and 2 drill bits
 - Need Forklift for 2 day starting day after tomorrow
 - Cancel my tool request 21245-08048
- Checking tool availability and status
 - Are there any drill bits available?
 - What happened to the hammer drill I had requested?
- Transferring tools between locations
 - Transfer 10215, 80148 from Warehouse to Job Site 1
- Assigning tools to a user
 - Assign 10289, 20743 to john@example.com
 - Extend the reservation for 10289 by 3 days
 - Check-in tools 10289, 20743
- Adding new users to the system
 - Add John Doe (john.doe@example.com) as an Admin and Jane Doe (jane.doe@example.com) as a Store Staff.
 - Make Jane Doe a Store Manager
- Logging Maintenance done on tools
 - Completed Safety Check for 2956355168. I tested its normal operations and ensure its in proper working condition.
- Record tool mileage and hours
 - Update mileage for 8234567802 to be 20300

In addition to carrying out common tasks, assistant can also help answer question related to how to use the system. In fact, assistant is made up of three agents, **Task Agent**, **Help Agent** and **Report Agent**. The Task Agent is responsible for completing tasks, while the Help Agent provides help assistance and the Report Agent generates custom reports and perform data analysis. They are all integrated and work together as a single unit!

5. Users

User are individuals who can access ToolWorks.



To add a new team member:

1. From **Users** tab, click **Invite User**
2. Enter User Details and modify Roles as required
3. Click **Invite**, this will send email to user with a login link where they can set their password and login.

There are three types of user roles provided out of the box:

1. **Admin**: are users that have full access to all features of ToolWorks.
2. **Store Staff**: are users that have access to tools and equipments in their assigned store and can checkout tools, fulfill orders, request transfers, etc.
3. **Users**: are field personals that can request tools from their assigned store. They can also transfer tools to another user.

There are just the default roles that are pre-defined in the system. You can create more roles and/or change permission of existing roles using **Custom Role** functionality. [Learn More](#)

Location Based Access

Users only have access to tools and equipment from the assigned location/tool store. You can change this by changing the rights for user roles. Navigate to **Settings**. [shift-ctrl-s] and click **Roles** to view list of role. Click any of role to see assigned rights. [Learn More](#)

6. Location

Location allows user to setup *location hierarchy* modeling real world. You can set up parent-child locations, and nest locations so you can track items from a country to a state, city, warehouse, job site, tool crib, all the way down to a single shelf. A location represents place where normally tools are kept and allows company employees to get and return tools. *Tool is tracked against a tool location.*

To Add a Location:

1. From **Locations** tab [shift-l], click **Create Location** button.
2. Enter Location Details
 - a. Name and Parent Location
 - b. Optionally, enter Location Address
 - c. Upload Location Photo
 - d. Enter custom order number prefix to customize order number generation
3. Click **Add Location**

[Learn More](#)

7. Categories

Category allows you to categories or group tools and equipment into various groups. Category can have one or more sub categories, allowing for fine tuning of groups.

To Add a Category:

1. From **Category** tab, click **Create Category**.
2. Enter category name. Optionally, enter category code, description and Inventory Type. You can also select an icon or upload a photo.
3. Click **Create** to create category.

[Learn More](#)

8. Reports

Reports allows you to view data about various activities in your tool management system. You can view reports by date, time, or by tool type. You can also download reports in any format.

8.1 Run Report

1. From **Reports** tab [shift-r], select a report.
2. Enter values for various report parameters.
3. Click **View** to run and view the report
4. Click **Save** to download the report or **Print** to print the report.

In addition to pre-defined reports, you can also create custom reports using Report Assistant. [Learn More](#)

8.2 Report Subscriptions

You can subscribe to reports to receive them in your email.

The screenshot shows a 'Maintenance Orders Report' window with a close button (X) in the top right. Below the title bar are three filter dropdowns: 'Days In Past' (set to 1 Week), 'Days In Future' (set to 1 Month), and 'Order Status' (set to All). Below these filters are four buttons: 'View' (with a circled '2'), 'Save', 'Print', and 'Subscribe' (with a circled '3'). A table below the buttons displays report data with the following columns: ORDER #, SERVICE, SERVICE BY, STATUS, TOOL NAME, BARCODE, MANUFACTURER, MODEL, START DATE, and END DATE. The first row of data is: 24330-154738-418, Inspect Vehicle, Pending, Crane, 8234567802, CAT, CATCRANE1, Nov 24 2024, Nov 24 2024.

ORDER #	SERVICE	SERVICE BY	STATUS	TOOL NAME	BARCODE	MANUFACTURER	MODEL	START DATE	END DATE
24330-154738-418	Inspect Vehicle		Pending	Crane	8234567802	CAT	CATCRANE1	Nov 24 2024	Nov 24 2024

1. From **Reports** tab [shift-r], select a report that you will like to subscribe to.
2. Click **View** to run and verify the report. Change parameters as needed.
3. Click **Subscribe** to subscribe to the report.
4. Enter email addresses, how often and when you want to receive the report, and click **Subscribe** to subscribe.
5. Back on report page, you will see **Subscribed**, indicating that report is subscribed to. You can hover over the **Subscribed** button to see the subscription details.

[Learn More](#)

9. Maintenance

Plan, schedule and carry out detailed maintenance work orders. You can quickly setup maintenance for any tool directly from the **Tools** tab.

To Setup Maintenance:

1. Navigate to the **Tools** tab. [shift-t]
2. Locate items that need maintenance and click **Add to Cart**.
3. In the Cart, Click **Maintain** to create maintenance order and enter the details.
 - a. Select **Type of Maintenance**
 - b. Enter **Start** and **End** dates
 - c. **Assign User** that will perform the service (optional)
 - d. Enter notes for maintenance personnel (optional)
4. Click **Schedule** to schedule maintenance order. Alternatively, click **Check Out** to assign equipment custody to user and start the work order.

9.1 Maintenance Log

You can quickly see services performed on any items right from the **Tools** tab. Just locate the tool and click to view details.

9.2 Upcoming Maintenance Notification

ToolWorks will automatically send out email notification about upcoming maintenance service request to assigned service personal as well to user that created the request. Two notifications are sent out, first one is about 1 week before start of maintenance request (you can configure how many days in advance this is sent out) and one the week of Maintenance.

In addition to auto email notifications, system will also send out message notifications (mobile app, web app) to all relevant users when actions like Service Complete, Maintenance Done etc.

[Learn More](#)

10. Mobile App

Take actions on the go with ToolWorks mobile app. Mobile App enables field users to easily request tools and reserve equipment from ToolWorks. It also allows Store Staff to get notifications about tool and equipment requests, manage assignments, and track usage. Scanner with continuous scanning can be used for checkout, check-in, transfer, maintenance and more.

[Download iOS App](https://apps.apple.com/app/id1557880607) (https://apps.apple.com/app/id1557880607)

[Download Android App](https://play.google.com/store/apps/details?id=com.meghsoft.toolworks) (https://play.google.com/store/apps/details?id=com.meghsoft.toolworks)



11. Explore Additional Features

- [Purchase Order](#)
- [Stock Audit](#)
- [Asset Depreciation](#)
- [Checkouts](#)
- [Store Transfers](#)
- [Field Requisition](#)
- [Field Transfer](#)