



## TTS – Tool Tracking Solution:

### ***Master / Catalog / Template Feature***

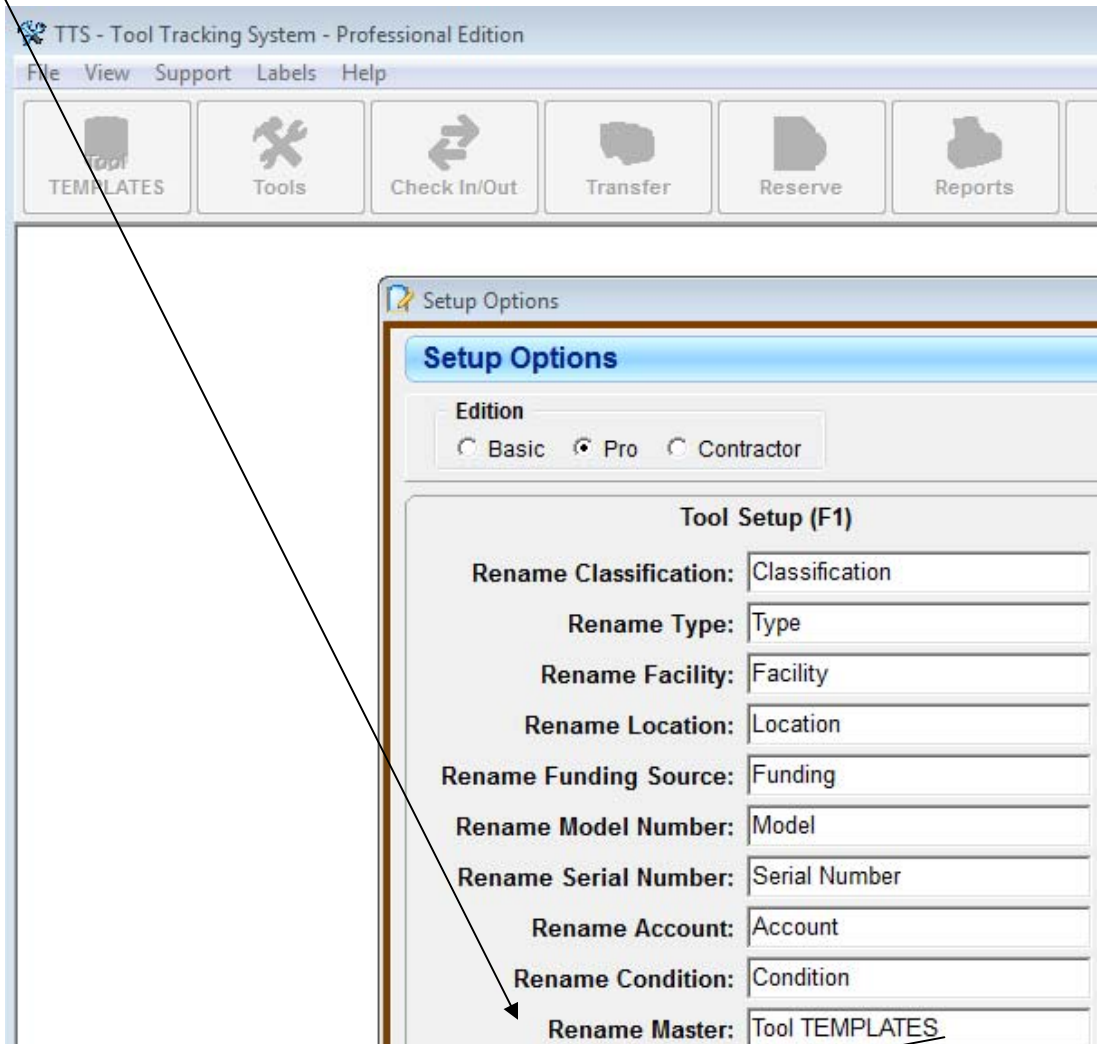
A key feature that TTS provides for is the option to easily create multiple assets/items/equipment/tools, etc., that are similar from a ***template***. This template is commonly referred to as a **Master**, as in a ***'master record'***; or, as a **Catalog**, as in a ***'catalog' item*** from an order manual or product book.

The user has the option to create items in the database by:

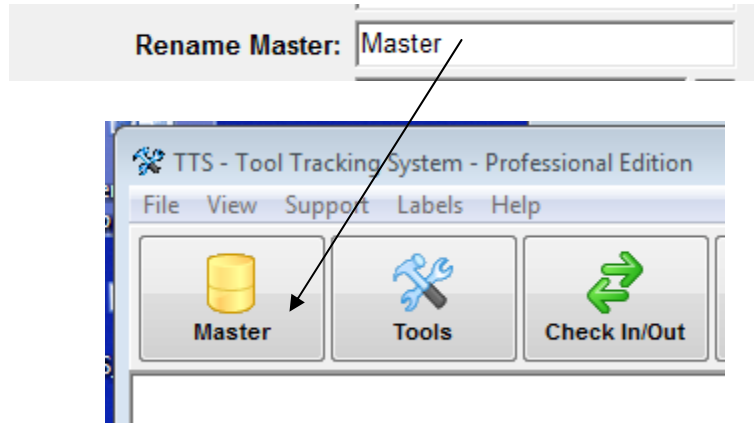
- 1) importing items via spreadsheet format
- 2) adding items directly from the Tool Information function with the "Add" button
- 3) copying an existing item and making simple modifications
- 4) utilizing the Master / Catalog / Template feature

This document addresses option 4: ***'Utilizing the Master / Catalog / Template feature'***. This feature provides the option to quickly and efficiently create new items with consistency in naming, description, and basic information details.

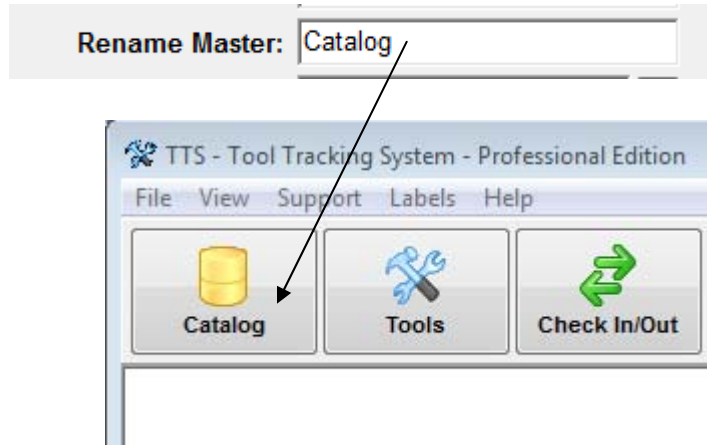
This document refers to 'Master / Catalog / Template' as 'optional' names. The default for this function is "Master"; however, under the FILE Text Tab in the TTS application, one can Select "Setup Options" and re-name this field.



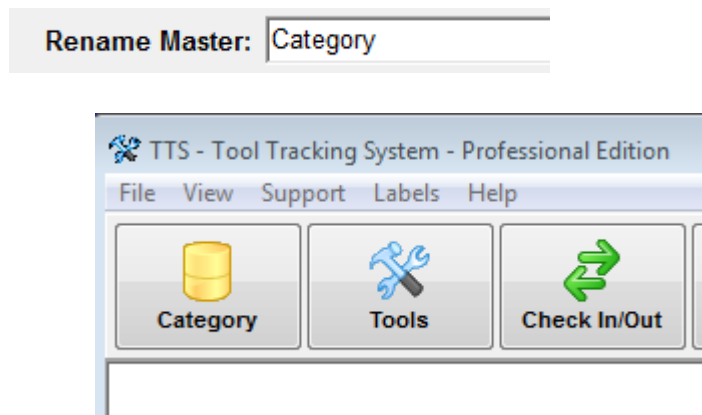
## Master



## Catalog



## Category



Essentially, the terms 'Master' and 'Catalog' are derived from the fact that many users order items or materials from a manufacturer's "Master" catalog or from a "Catalog".

The catalog item is generic, as it has no assigned barcode or identifier specifically for your particular business. It doesn't receive its specific or 'unique' barcode identifier until it is received and put into company inventory.

**EX:**

The screenshot shows a navigation bar with four red tabs: "Power Tools", "Hand Tools", "Instruments", and "Accessories". Below this is a "Navigate By:" section with a "CATEGORY" dropdown and five product category thumbnails: "CLAMP METERS", "DIGITAL MULTIMETERS", "FORK METERS", "INSPECTION AND DETECTION", and "LEVELING AND DISTANCE". An arrow points from the "Instruments" tab to the "INSPECTION AND DETECTION" category. Another arrow points from the "INSPECTION AND DETECTION" category to a detailed product view of a "Laser Distance Meter Kit".

**Laser Distance Meter Kit**  
2280-20

★★★★★

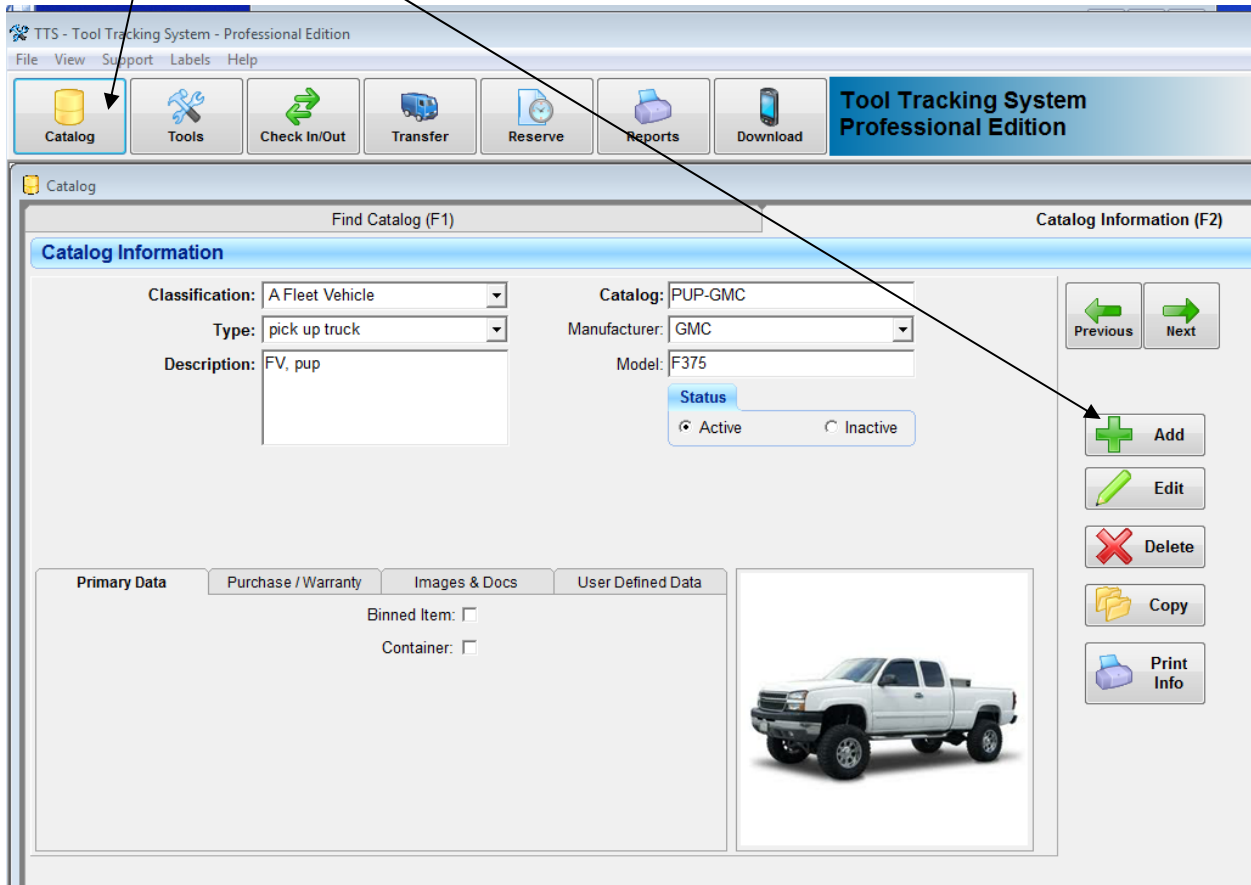
Distance Range	0.05" to 197'
Basic Accuracy	0.05"
Length Area Volume	Yes

This Laser Distance Meter Kit is very generic. It has an image, model & manufacturing part number, basic description, and basic functional information.

If this is an item consistently ordered, it would be simple to create a 'catalog, master or template' for it. Then, it won't be necessary to re-create the all of the basic information for this item when new ones are received.

**To do this:**

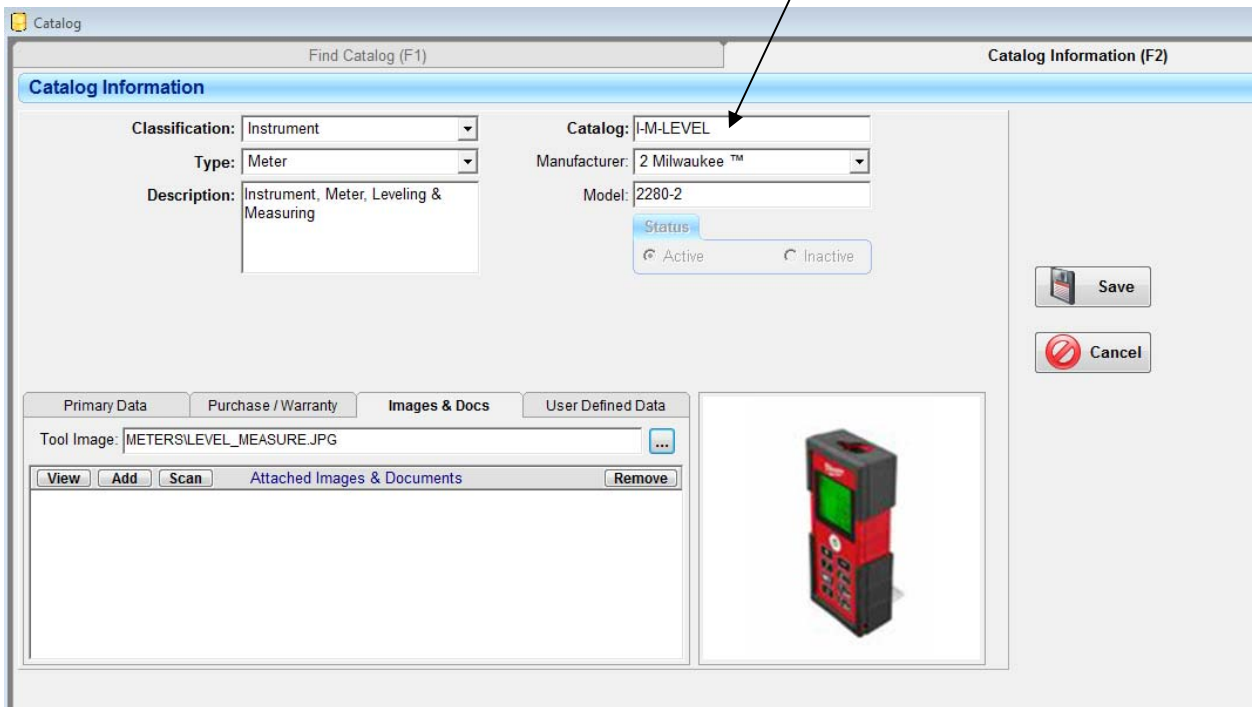
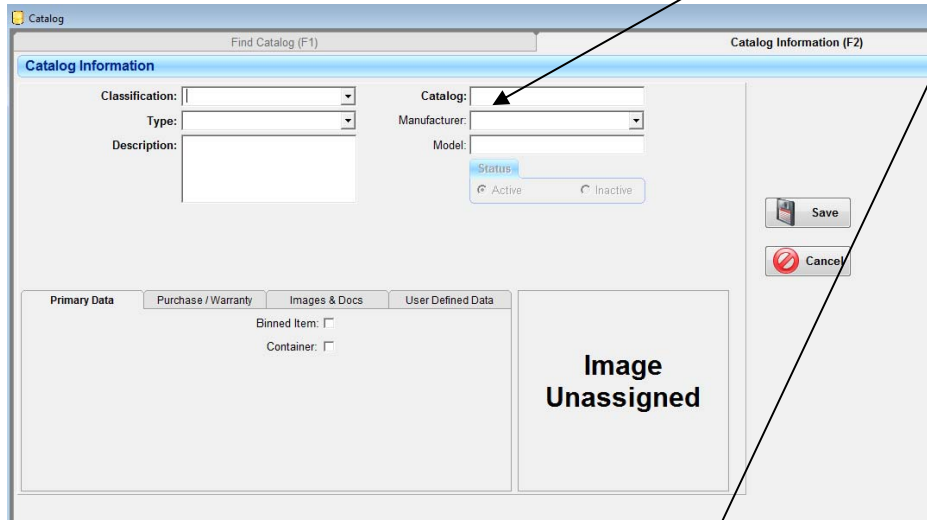
- SELECT the Master / Catalog / Template (whatever you've named the feature)  
SELECT ADD to generate a new basic item:



Populate the fields with all the basic information for the item. This can include additional images, documents and user-defined data fields.

You'll also need to determine how to identify the template later when it's used to create 'unique' items in the database. This identifier will serve the same purpose that the 'barcode' does for pulling up information on individual items.

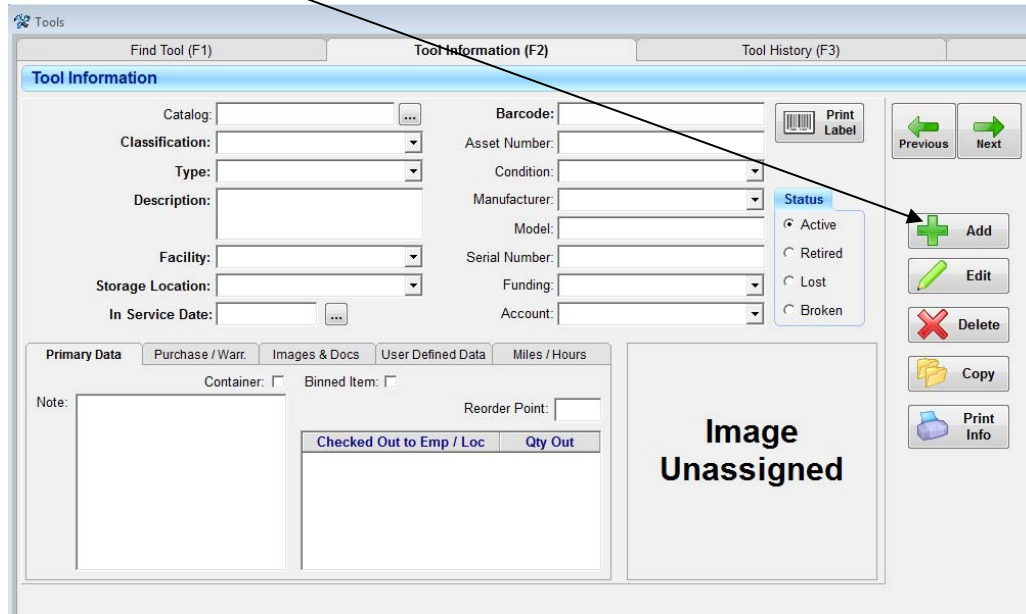
Select SAVE when complete.



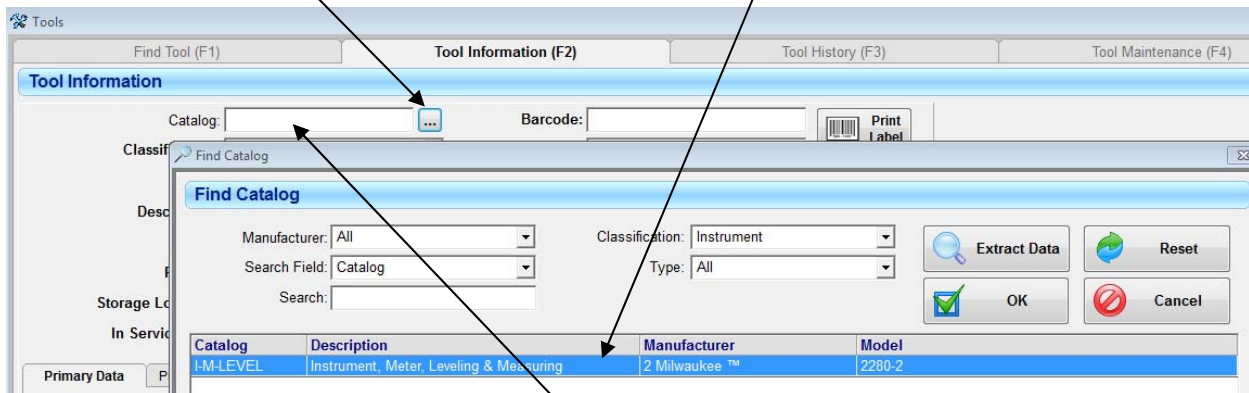
Now, whenever a shipment of meters is received, it's easy to add them to the main database and save them with their own unique, barcode identifier:

**From the Tool Information Function:**

- o SELECT ADD to create the new tool



Select the "Catalog" box , locate, then double-click on the item to be added:



(OR, simply type in **I-M-LEVEL** in the Catalog field.  
Depress the Enter key to populate the new item fields.)

The Master / Catalog / Template ID will automatically populate the Tool Information record screen with all basic information that was provided via the, in this case, “Catalog” record.

As only the ‘**bolded**’ field information is required, all that would be necessary to complete the tool entry would be the Facility, Storage Location and Barcode fields. *Otherwise*, fill in any additional, optional information that will be needed for the tool record information.

SELECT Save to save the new item.

The screenshot displays the 'Tools' application window with the 'Tool Information' form. The form is organized into several sections. The top section, 'Tool Information', contains the following fields: Catalog (I-M-LEVEL), Classification (Instrument), Type (Meter), Description (Instrument, Meter, Leveling & Measuring), Facility, Storage Location, In Service Date (4/30/2014), Barcode, Asset Number, Condition, Manufacturer (2 Milwaukee™), Model (2280-2), Serial Number, Funding, and Account. A 'Status' dropdown menu is open, showing options: Active, Retired, Lost, and Broken. A 'Print Label' button is located next to the Barcode field. The bottom left section, 'Primary Data', has tabs for Purchase / Warr., Images & Docs, User Defined Data, and Miles / Hours. It includes checkboxes for Container and Binned Item, a Note field, and a Reorder Point field. The bottom right section features a 3D image of a red and black surveying level.

The Catalog /Master feature brings over all information tied to a particular Classification & Type of equipment. This includes user-defined fields, as well as maintenance.


If multiples of this item are received, once the first is saved, SELECT the Copy button to create the next item.

Save the subsequent item with a new barcode and continue until all new items are in the system.

Tools

Find Tool (F1)      Tool Information (F2)      Tool History (F3)

### Tool Information

Category: I-M-LEVEL	Barcode: IM22	 Print Label
Classification: Instrument	Asset Number:	← Previous      Next →
Type: Meter	Condition:	
Description: Instrument, Meter, Leveling & Measuring	Manufacturer: 2 Milwaukee™	<b>Status</b>
Facility: ACME Central Warehouse	Model: 2280-2	<input checked="" type="radio"/> Active
Storage Location: Aisle 1	Serial Number:	<input type="radio"/> Retired
In Service Date: 4/30/2014	Funding:	<input type="radio"/> Lost
	Account:	<input type="radio"/> Broken

Primary Data    Purchase / Warr.    Images & Docs    User Defined Data    Miles / Hours


Note:

Container:     Binned Item:     Reorder Point:

**Check Out**

To:

Date Due:



**+ Add**  
**✎ Edit**  
**✖ Delete**  
**📁 Copy**  
**🖨 Print Info**