

Tools Tracker

User Guide

Track who has what, check tools in and out, get overdue reminders, and keep your team accountable — all from Telegram.

Quick Reference

Command: /tools

Access: Requires active subscription or trial

Languages: English, Spanish, French, Portuguese, Chinese, Japanese

Tracking: Individual tools with checkout/check-in, GPS, due dates

Contents

1. Getting Started
2. The Main Menu
3. Adding Tools
4. Checking Out Tools
5. Checking In Tools
6. My Tools
7. Who Has What
8. Tool History
9. Reports & Exports
10. Site Management
11. Sharing & Collaboration
12. Notifications & Reminders
13. Tool Categories
14. Quick Reference

1. Getting Started

The Tools Tracker helps you manage physical tools and equipment — track who has what, when it was checked out, where it is, and when it's due back. Unlike the Stock Inventory (which tracks material quantities), the Tools Tracker follows individual items through check-out and check-in cycles.

To open the Tools Tracker:

- Type /tools in the chat

On your first visit, a default site called "Tool Inventory" is created. You can rename it and share access with team members.

Tip: Each tool is tracked as an individual instance — if you have 3 Fluke 117 meters, each one gets its own entry with a unique description (e.g., serial number, color tape marking).

2. The Main Menu

The tools menu shows different options depending on whether you own the site or are a shared member.

The menu header shows the site name and tool count (e.g., " Shop Tools (12 tools)") so you always know how many tools are at the site.

Everyone sees:

Check Out	Check out a tool — full flow with location/notes/due, or quick one-tap checkout
Check In	Return a tool you have checked out and report its condition
View	See all tools at the site with their current status
My Tools	See all tools currently checked out to you
Report	Export tools as PDF report or CSV spreadsheet
History	View the last 20 checkout/check-in events

Site owners also see:

Who Has What	See every checked-out tool and who has it
Add Tool	Register a new tool in the inventory
Delete Tool	Permanently remove a tool

Share	Invite a team member by @username
Members	View and remove shared members — shows full name and @username
Rename Site	Change the site's display name

3. Adding Tools

Only the site owner can add tools. Tap Add Tool and follow these steps:

- Step 1 — Category: Choose from Power Tools, Meters, Hand Tools, Cables, Safety, or Other
- Step 2 — Name: Enter the tool name (e.g., "Fluke 117", "DeWalt Impact Driver")
- Step 3 — Quantity: How many of this tool are you adding? (1-50)
- Step 4 — Description: Enter a unique description for each unit to tell them apart

If you're adding multiple units of the same tool, the bot asks for a separate unique description for each one. This is how you distinguish between them — use serial numbers, color markings, asset tags, or any identifying detail.

Example:

Tool	Unique Description
Fluke 117 #1	Serial #12345, yellow tape
Fluke 117 #2	Serial #67890, red tape, new battery
Fluke 117 #3	Serial #24680, cracked case — works fine

Tip: Good unique descriptions save time later. When a tech is checking out tools, they'll see these descriptions to pick the right one.

4. Checking Out Tools

Tap Check Out to borrow an available tool. Tools are listed alphabetically with their descriptions. You have three checkout options:

Quick checkout (👉):

- Tap the button next to any tool for a one-tap checkout
- Skips location, notes, and due date — perfect for grabbing tools on the go
- The tool is immediately checked out to you

Full checkout:

- Step 1: Tap the tool name (not the 📄) from the available list
- Step 2 — Location (optional): Share your GPS location or skip
- Step 3 — Notes (optional): Add a reference (e.g., "Job #12345 — downtown office")
- Step 4 — Due date (optional): Enter a return date in YYYY-MM-DD format, or skip

Bulk checkout:

- Tap Select Multiple at the bottom of the checkout list
- Toggle tools on/off by tapping (checked = selected, unchecked = not selected)
- Tap the confirm button when ready
- Location, notes, and due date apply to all selected tools

After checkout, the site owner is notified automatically. If all units of a tool type are now checked out, the owner receives an additional alert.

Note: Tools with a due date will trigger automatic overdue reminders if not returned on time. See Section 12 for details.

5. Checking In Tools

Tap Check In to return a tool you've borrowed. Only tools currently checked out to you will appear.

- Step 1: Select the tool you're returning
- Step 2 — Condition: Report the tool's condition:

Condition	When to Use
Good	Tool is working perfectly, no issues
Fair	Tool works but has minor wear or cosmetic issues
Needs Repair	Tool is damaged or malfunctioning — needs attention

After check-in, the site owner is notified with the tool name, who returned it, and the condition. Tools marked "Needs Repair" are flagged in reports.

6. My Tools

Tap My Tools to see everything you currently have checked out. For each tool, you'll see:

- Tool name and unique description
- Checkout date
- Location (if you shared it at checkout)
- Due date (if one was set)
- Condition (if not "Good")
- Checkout notes (if any)
- Which site it belongs to

Tip: Check My Tools regularly to make sure you don't forget to return anything. Tools with due dates will also appear in overdue reminders.

7. Who Has What

Available to site owners only. Tap Who Has What to see all currently checked-out tools across your entire site, including:

- Which tech has each tool
- When they checked it out
- Their location (if shared)
- When it's due back
- The tool's last known condition
- Any checkout notes

This is your accountability dashboard — use it during morning meetings, at the end of the day, or whenever you need to track down a specific tool.

8. Tool History

Tap History to see the last 20 tool transactions. Each entry shows:

- Whether it was a checkout or check-in
- Tool name and who performed the action
- Condition (for check-ins)
- Timestamp

History provides a complete audit trail. If there's ever a question about where a tool went or who had it last, the history has the answer.

9. Reports & Exports

Tap Report from the main menu to choose your export format:

PDF Report

- Tap Report then PDF Report
- Generates a professional PDF showing the current state of all tools
- Header: Report number, site name, preparer, date
- Tools table: Every tool with name, description, category, status (IN/OUT), who has it, checkout date, due date, and condition
- Color coding: Checked-out tools highlighted in red, available tools in green
- Summary box: Total tools, available, checked out, needs repair, and overdue counts
- Checked-out tools appear at the top for easy scanning

CSV Export

- Tap Report then CSV Spreadsheet
- Downloads a spreadsheet-ready file with columns: Tool Name, Description, Status, Checked Out By, Due Date, Location, Category
- Open in Excel, Google Sheets, or any spreadsheet application
- Tools are sorted alphabetically

Tip: Generate a report at the start and end of each week to track tool movement. PDF reports are great for insurance documentation and loss prevention. CSV exports are ideal for integrating with other tracking systems.

10. Site Management

Each user can own one tool site. The site is created automatically on your first visit.

Renaming your site:

- Tap Rename Site (owner only)
- Enter a new name (max 50 characters)
- Useful for naming it after your shop, truck, or team

Deleting tools:

- Tap Delete Tool (owner only)
- The list shows each tool with a status indicator: Available or Checked Out
- Tap a tool to permanently delete it

Note: Deleting a checked-out tool removes it permanently. Make sure the tool has been returned first, or coordinate with the tech who has it.

11. Sharing & Collaboration

Share your tool site with team members so they can check tools in and out.

Inviting a member:

- Tap Share (owner only)
- Enter their @username — they must have used the bot before
- They receive a notification and can immediately access your tools via /tools

Managing members:

- Tap Members to see all shared members — each shows their full name and @username
- Tap the remove button next to a member to revoke their access

Access levels:

Action	Owner	Member
Check out / check in	Yes	Yes
View all tools & history	Yes	Yes
My Tools	Yes	Yes
Generate reports (PDF/CSV)	Yes	Yes
Who Has What	Yes	—
Add / delete tools	Yes	—
Share / manage members	Yes	—
Rename site	Yes	—

12. Notifications & Reminders

The Tools Tracker sends automatic notifications to keep everyone informed:

Checkout notifications (to site owner):

- When a member checks out a tool, the owner is notified with the tool name and who took it
- If all units of a tool type are now checked out, the owner receives an additional all-out alert

Check-in notifications (to site owner):

- When a member returns a tool, the owner is notified with the tool name, who returned it, and the condition
- "Needs Repair" check-ins include a condition note

Overdue reminders (daily at 8:00 AM UTC):

- If a tool has a due date and hasn't been returned, both the borrower and the owner receive a reminder
- The borrower sees: the tool name, due date, and a prompt to return it
- The owner sees: the tool name, who has it, and the due date
- Reminders repeat daily until the tool is checked in

Tip: Set due dates on tools going to job sites to ensure they come back. The automatic reminders take the awkwardness out of asking for tools back.

13. Tool Categories

When adding tools, assign them to a category for better organization in reports and lists:

Category	Examples
Power Tools	Drills, impact drivers, rotary hammers, saws
Meters	Multimeters, cable testers, tone generators, network testers
Hand Tools	Screwdrivers, pliers, wire strippers, crimpers
Cables	Extension cords, test leads, network cables
Safety	Hard hats, safety glasses, harnesses, lockout/tagout kits
Other	Ladders, tool bags, specialty equipment

14. Quick Reference

Action	How
Open Tools Tracker	Type /tools
Add a tool	Add Tool > category > name > qty > descriptions (owner only)
Quick checkout	Check Out > tap next to any tool (one tap)
Full checkout	Check Out > tap tool name > location > notes > due date
Bulk checkout	Check Out > Select Multiple > toggle tools > confirm
Return a tool	Check In > pick tool > report condition
See your tools	My Tools shows everything checked out to you
See all checked out	Who Has What (owner only)
View history	History shows last 20 transactions
Export PDF	Report > PDF Report
Export CSV	Report > CSV Spreadsheet
Delete a tool	Delete Tool > pick tool (owner only)
Share with team	Share > enter @username (owner only)
Remove a member	Members > tap remove (owner only)
Rename site	Rename Site > type new name (owner only)