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Introduction

The John Deere Tool Organizer is a web application that enables authorized web users to search, sort, organize and manage their dealership's special tools, non-essential tools and shop equipment.

Users can access the website through the Tool Org link on the SERVICEGARD® website. The application allows multiple users both within a dealer location, and within the extended dealer network to manage their inventory. Users can import their initial inventory through a provided template. The inventory upload process is a one-time only process that must be completed before users can use the John Deere Tool Organizer.

Utilizing the John Deere Tool Organizer will result in a more efficient and profitable dealership. Enjoy your new John Deere Tool Organizer!



Tool Organizer Inventory Upload

Tool Inventory Upload Template Instructions

Summary

Before loading tools into Tool Organizer using the Inventory Upload Process, the Tool Inventory Upload Template must be completed. With the SERVICEGARD® Tool Inventory Upload Template, you are able to record your service tool inventory and storage locations in a format that is compatible with the Tool Organizer system. This provides the most efficient method of bulk-uploading dealer tool inventory when the system is initially set-up.

Detail

When tools are entered or selected from the drop-down list, the macros in the spreadsheet will check to see if the tool is a valid SERVICEGARD® tool. If it is not a SERVICEGARD® tool, you may still enter it as a custom tool

While working in the file, save it often. When completed, save the file a final time and record/remember where it is stored. You will be prompted to upload the file into the Tool Organizer website when logging in for the first time.

Each time the file is saved, a validation window pops-up. Select OK to run the validation, or Cancel to skip validation. It is recommended that the validation be performed before uploading the template.

1. When you receive the Tool Inventory Upload Template spreadsheet (or save the blank template from the Tool Organizer website), rename the file using your dealer location and number.
 - If using Excel version 2007 or later, save the file as file type "Microsoft Office Excel Workbook (*.xls)".
2. Open the Tool Inventory Upload Template.
 - If you receive a security warning for macros, enable macros using the appropriate method for your version of Excel.

3. On the Storage Locations tab, fill out the information as follows:

NOTE: Only the main storage location in column A is required. All other columns are optional.

NOTE: The Tool Location (Not Editable) is automatically populated as you complete the other columns.

- **Main Storage Location:** populate the main storage location (Ex., Bay 1).
- **Sublocation 1:** populate the first sublocation (Ex., Cabinet 2).
- **Sublocation 2:** populate the second sublocation (Ex., Shelf 2).
- **Sublocation 3:** populate the third sublocation (Ex., Bin 1).
- **Sublocation 4:** populate the fourth sublocation (Ex., Slot 4).

4. Select the Inventory tab, and fill out the information as follows:

- **Tool Number:** select the tool number from the drop-down list (if it is a SERVICEGARD® tool), or enter the tool number manually (for non-SERVICEGARD® tools).

NOTE: When entering kits, either enter the full kit number or enter all tools within the kit individually. Do not enter both the kit number and the tools in the kit, or each one will appear as a unique tool, creating a false duplicate.

- **Tool Description:** add the tool description.
 - This field only needs to be filled-in for custom tools. For SERVICEGARD® tools, this field is automatically populated.
- **Identity Tag** (optional): enter a serial number or unique identifier for the tool, especially if there is more than one of that tool.
 - If you assign an identity tag, the Quantity must be 1.
 - If you do not assign an Identity Tag, the Tool Org website will add the Identity Tag when the template is uploaded.
 - Add additional lines for identical tool numbers with different identity tags.
- **Quantity:** enter the quantity of the tool (in whole numbers).
 - If 0 or a fractional number is entered, an error box appears.
 - If an identity tag was entered, the quantity of 1 cannot be changed.
- **Location:** select the tool location from the dropdown list.
 - The Location dropdown list is automatically populated from the locations entered on the Storage Locations tab in Step 3.
 - If you need to add additional storage locations, repeat step 3.



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5. When complete, save the file.
6. On the final save, click OK to run the validation.
 - When running the validation, tools with errors are highlighted in red, while custom tool are highlighted in blue.
 - All errors must be corrected before loading the template to the Tool Org website.
 - Verify the items in blue are intended as custom tools. If not, correct as necessary.
 - For SERVICEGARD® tools, the SERVICEGARD® Tool and Tool Description fields automatically populate when the validation is run.
 - [Click here for a video demonstration.](#)



Inventory Upload Process

Summary

When first logging in to the Tool Organizer application, users are required to read and agree to the Opt Out of Inventory Upload Process warning. Then either upload a provided template or "Opt Out" of the Inventory Upload Process to activate the application.

***WARNING: It is NOT RECOMMENDED to select "Opt Out Of Inventory Upload" when doing your initial inventory upload.**

*If you select the Opt Out feature, you will not be able to upload an Excel file of your dealership's tool inventory using the Initial Inventory Upload Process now or in the future. Using the Inventory Upload Process is the first step in using the John Deere Tool Organizer application and is a ONE-TIME only function.

The Initial Inventory Upload Process CANNOT be reset if you select "Opt Out of Inventory Upload".

Selecting the Opt Out feature will require that you MANUALLY ENTER EACH AND EVERY INDIVIDUAL TOOL NUMBER, TOOL NAME AND STORAGE LOCATION for your dealership.

It IS RECOMMENDED that you use the provided Excel template.

The Inventory Upload Process is a multi-step process that will efficiently get your dealership's inventory into the application for use. Please follow the process carefully.



Detail

NOTE: Before going through this process, you should have completely filled out the previously provided Tool Organizer Excel spreadsheet. You will need this document during the inventory upload process. Be sure to follow the instructions provided with the spreadsheet to ensure it is filled out correctly.

To start organizing your dealership's tool inventory and shop equipment, follow these steps:

1. Go to the John Deere SERVICEGARD® website.
2. Click Tool Org to access the Tool Organizer application.
 - The Opt Out disclaimer will automatically appear when taken to the Tool Organizer web page.
3. Read the Opt Out of Inventory Upload warning. You must click the checkbox at the end of the Warning to proceed.
4. Click the link at the bottom of the Opt Out of Inventory warning.

*If you select the Opt Out feature, you will not be able to upload an Excel file of your dealership's tool inventory using the Initial Inventory Upload Process now or in the future. Using the Inventory Upload Process is the first step in using the Tool Organizer application and is a ONE-TIME only function.

The Initial Inventory Upload Process CANNOT be reset if you select "Opt Out Of Inventory Upload".

Selecting the Opt Out feature will require that you MANUALLY ENTER EACH AND EVERY INDIVIDUAL TOOL NUMBER, TOOL NAME AND STORAGE LOCATION for your dealership.

5. Click Browse to locate the inventory file you want to upload.
6. Select the file and click Open.
7. Click Submit.
 - The "Upload in Progress....." popup box displays while the file is being loaded.



8. If an error report has been generated, an error preview screen appears (as shown in the demonstration video). At this point, there are two options:
 - Save the errors locally using the Export button, and repair them manually at a later time.
 - Save the errors locally using the Export button, select Quit, fix the errors in the original inventory file, and attempt to upload the document again.
 - Errors can include:
 - Special Tool number not found in the applications catalog
 - Tool number missing in the file
 - Storage location missing in the file
9. Select Ignore and Continue.
10. In the Ignore Errors Alert, read the message and click Ignore and Continue.
11. When you receive the upload confirmation message, select "Click here to continue".
 - You **must** click this link to complete the activation process.
12. Enter the e-mail address for the administrator who will handle tool requests, and click Save.
 - A confirmation message appears.
 - At this time, the process is complete.
 - [Click here for a video demonstration.](#)



Use Tools

Overview

The most common type of tool maintenance involves inventory within a dealer (as opposed to between dealers). For stand-alone dealers, this is the only type of tool maintenance that occurs. For dealer groups, it is also possible to interact with other dealers in the group in order to share tools.

This section specifically addresses tool inventory within a dealer. For additional information on addressing inventory between dealers, refer to *Manage Tool Inventory - Between Dealers*.

Search

Summary

The Search function is the quickest way to find tools both within your dealer, and within your dealer group (if applicable). Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before initiating a search. Only single word searches are allowed and only letters and numbers in the search text.

Detail

1. Click Search.
 - If you want to search for multiple tools, select Advanced Search once the screen refreshes to search for up to 6 tools at the same time.
2. Choose which dealer(s) to search for the tool.
 - For stand-alone dealers, no selection needs to be made.
 - For dealer groups, choose whether to search only within your dealer, or within the dealer group.
3. Select "Tool Number" or "Tool Name" from the drop down list.
3. Enter the search criteria (tool name or tool number) in the text box, and click Go.
4. The tools displays on the screen (if a matching tool is found).
5. To carry out further actions on the tool, refer to the appropriate section in this manual.
 - [Click here for a video demonstration.](#)

Check-Out (In-Dealer)

Summary

Checking-out tools is a process that allows users to select which tool(s) they wish to Check-Out and temporarily remove from inventory. Only tools that are currently checked-in can be checked-out.

Detail

1. Click Check-Out.

NOTE: Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before initiating a search.

2. Select "Tool Number" or "Tool Name" from the drop down list.
3. Enter the search criteria (tool name or tool number) in the text box, and click Go.
4. Select the tool from the list of checked-in tools by checking the box next to the tool number.
5. Click Next.
6. In the "Assignee" drop-down menu, select the assignee the tool is to be checked-out to.
 - The default assignee is "Default".
7. Click Check-Out.
 - A confirmation message confirms the tool(s) was checked-out.
8. To print a list of the tools to be checked-out, including the storage location information, click Print.
9. Verify the information and click any menu item to continue in the Tool Organization application.

Notes:

- If you make a mistake at any time before the tool(s) is checked-out and you want to start over, click the "Back" button. This will take you back to the beginning of the tool Check-Out process without saving your changes.
- [Click here for a video demonstration.](#)



Check-Out (Borrowed)

Summary

Checking-out borrowed tools is similar to checking-out tools within a dealer. The main difference is the location shows the dealer borrowing the tool, along with the lending dealer.

Detail

1. Click Check-Out.

NOTE: Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before initiating a search.

2. Select "Tool Number" or "Tool Name" from the drop down list.
3. Enter the search criteria (tool name or tool number) in the text box, and click Go.
 - Alternatively, you can select the tool from the displayed list of tools.
4. Select the tool from the list of checked-in tools by checking the box next to the tool number.
5. Click Next.
6. In the "Assignee" drop-down menu, select the assignee the tool is to be checked-out to.
 - The default assignee is "Default".
7. Click Check Out.
 - A confirmation message confirms the tool(s) was checked-out.
8. To print a list of the tools to be checked-out, including the storage location information, click Print.
9. Verify the information and click any menu item to continue in the Tool Organization application.
 - [Click here for a video demonstration.](#)

Check-In (In-Dealer)

Summary

Checking-in tools is a process that allows users to select which tool(s) they wish to Check-In and return back to inventory. Only tools that are currently checked-out are available for check-in.

Detail

1. Click Check-In.
2. Select "Tool Name", "Tool Number", or "Assignee" from the drop-down list.
 - Alternatively, you may go to step 4 and select the tool(s) directly from the displayed list of checked-out tools.
3. Enter the search criteria and click Go.
 - If selecting "Assignee", select the Assignee from the second drop-down menu, rather than typing in the tool name or number and clicking Go.
4. Select the tool(s) from the list of checked-out tools by checking the box next to the tool number.
5. Click Next.
6. On the "Enter Tool Condition and Comments" screen:
 - Verify the information for the tool(s) is correct.
 - Select the tool condition from the drop-down list.
 - Add comments in the blank text box (optional).
7. Click Check In.
 - A confirmation message confirms the tool(s) was checked-in.
 - You can also print the check-in report by clicking Print.

Notes:

- If you make a mistake at any time before the tool(s) is checked-in and you want to start over, click the "Back" button. This will take you back to the beginning of the tool Check-In process without saving your changes.
- [Click here for a video demonstration.](#)



Check-In (Borrowed)

Summary

Checking-in borrowed tools is similar to checking-in tools within a dealer. The main difference is the location shows the dealer borrowing the tool, along with the lending dealer.

Detail

1. Click Check-In.
2. Select the tool(s) from the list of checked-out tools by checking the box next to each tool number.
3. Click Next.
4. On the "Enter Tool Condition and Comments" screen:
 - Verify the information for the tool(s) is correct.
 - Select the tool condition from the drop-down list.
 - Add comments in the blank text box (optional).
5. Click Check In.
 - A confirmation message confirms the tool(s) was checked-in.
 - You can also print the check-in report by clicking Print.
 - [Click here for a video demonstration.](#)



Request

Summary

Request is used to request a tool from another dealer location. This process informs the dealer that a tool has been requested by sending an e-mail notification. Once requested, it is up to the dealer that owns the tool to complete the Loan process. The tool must also be physically moved to the requesting dealer.

Detail

1. Click Search.
2. Select "All Dealers In My Dealer Group".
3. Select "Tool Name" or "Tool Number" from the drop-down list.

NOTE: Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before inserting the search information.

4. Enter the search criteria and click Go.
5. Select the tool(s) from the list of displayed tools by checking the box next to each tool number.
6. In the "Select Inventory Action" dropdown, select Check-Out and click Next.
7. On the confirmation screen, select the Assignee from the drop-down list and click Check Out.
 - You may also click Back at this point to change any information.
 - A confirmation message confirms an email request for the tool was sent.
 - [Click here for a video demonstration.](#)

Loan Tools

Summary

Loan is used when a tool is requested from another dealer. This process flags the tool to be loaned, which temporarily removes it from the list of tools available for check-out. The tool must still be physically transferred to the requesting dealer to complete the loan process. Loaning tools is easiest using Search, rather than using the Loan/Return selection, as you need to know the tool location in order to loan it out.

Detail

1. Click Loan Tools.
2. Select "Tool Name" or "Tool Number" from the drop-down list.
 - Alternatively, you can click Advanced Search to enter up to 6 tools to loan.

NOTE: Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before inserting the search information.

3. Enter the search criteria and click Go.
4. Select the tool(s) from the list of displayed tools by checking the box next to each tool number.
5. In the "Select Inventory Action" dropdown, make sure Loan is selected and click Next.
6. Select the dealer to loan the tool to in the "Select a Dealership to Loan" dropdown.
7. Click Loan.
 - A confirmation message confirms the tool(s) was loaned.
 - [Click here for a video demonstration.](#)



Return Tools

Summary

Return is used when returning loaned tools to the dealer that owns the tool. When returning borrowed tools, you must select them from the "Borrowed" location. The tool(s) must still be physically returned to the originating dealer to complete the return process.

Detail

1. Click Return Tools.
2. Select the tool(s) from the list of borrowed tools by checking the box next to each tool number.
3. Click Next.
4. Verify the information is correct and click Submit.
 - A confirmation message confirms the tool(s) was returned.
 - [Click here for a video demonstration.](#)



Check-In Returned Tools

Summary

When tools are returned to a dealer after having been loaned, they are automatically stored in the "Returned" location. In order for them to be checked-out again, they must be moved to a regular storage location first.

Detail

1. Click Move Tools.
2. Using the navigation tree in the left column, select the "Returned" location.
3. Click the Next button under the navigation tree.
4. Select the tool(s) to be moved in the center column.
 - The "Select All" box can be checked if all tools in the returned to inventory.
5. Select the new "To" storage location in the right column and click "Move Selected Tools" to complete the action.
 - [Click here for a video demonstration.](#)



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Manage Your Inventory

Overview

In addition to operations associated with tool usage, Tool Organizer also includes the ability for a dealer tool administrator to manage equipment and users. This includes, for instance, adding/removing tools from inventory, creating/editing tool storage locations, and managing assignees for checked-out tools.

Add New Tool

Summary

After the initial inventory upload, there may be times when it becomes necessary to add tools to the dealer inventory.

Detail

1. Click Add New Tool.
2. Select "SERVICEGARD Tools" or "Other Tools", and click Next.
 - Selecting SERVICEGARD Tools accesses only those tools that exist in the SERVICEGARD® catalog, and it automatically includes the tool descriptions.

3. Follow the appropriate method below:

**SERVICEGARD®
Tool**

4. Enter the tool name or number.
5. Click Go.
6. Select the tool from the list of displayed tools by clicking "Select" next to the tool.
7. Select the storage location for the tool.
8. Add the Identity Tag information, or allow the system to auto-generate the tag.
9. Choose the tool condition from the dropdown menu and add any comments.
10. Click Add.
 - A confirmation message confirms the tool was added.

Other Tool

4. Enter the Tool Number.
5. Enter the Tool Name.
6. Select the storage location for the tool.
7. Add the Identity Tag information, or allow the system to auto-generate the tag.
8. Choose the tool condition from the dropdown menu and add any comments.
9. Click Add.
 - A confirmation message confirms the tool was added.

Notes:

- [Click here for a video demonstration \(SERVICEGARD® Tools\).](#)
- [Click here for a video demonstration \(Other Tools\).](#)



Edit Existing Tools

Summary

Edit Existing Tool provides a method for changing tool information regardless of the status of the tool. It also provides for removing tools from inventory.

Detail

1. Click Edit Existing Tool.
2. Select "Tool Name" or "Tool Number" from the drop-down list.

NOTE: Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before inserting the search information.

3. Enter the search criteria and click Go.
4. Select the tool from the list of displayed tools by clicking "Select" next to the tool.
5. On the "Update Tool Information" screen, update the tool information as needed and click Update.

- To remove the tool from inventory, click Remove.

NOTE: There is no removal confirmation screen. Once Remove is selected, the tool is removed from inventory. Verify the correct tool is selected before Remove is clicked.

- A confirmation message confirms the action has been completed.
- [Click here for a video demonstration.](#)

Manage Storage Locations

Summary

Manage Storage Locations allows administrators to add, update, or remove storage locations within the dealership. Each location allows up to five sub-locations.

The instructions below apply to any location or sub-location. Make sure you select the correct location/sub-location when performing any storage location changes.

Detail

1. To add a storage location:

1. Select Manage Storage Locations.
2. Enter the name of the storage location in the available box, and select Add.
 - To add a Sublocation, first select the next level up in the navigation tree, then enter the location and click Add.
 - [Click here for a video demonstration.](#)

2. To remove a storage location:

NOTE: Storage locations cannot be removed until all tools stored within them are checked back in.

1. Select Manage Storage Locations.
 2. Use the navigation tree to find the storage location you want to remove, and select it.
 3. Select Remove.
 - [Click here for a video demonstration.](#)
- To edit a storage location:
 1. Select Manage Storage Locations.
 2. Use the navigation tree to find the storage location you want to edit, and select it.
 3. Edit the entry, and select Update.
 - [Click here for a video demonstration.](#)

Notes:

- Clicking on the "Cancel" button will clear the Locations field and start the process from the beginning. It will NOT remove any information already added, updated or removed.

Move Tools

Summary

Move Tools provides the dealer tool administrator with moving tools from one location to another within the dealership. Because tools are selected by storage location in this method, it is most useful when moving a **collection** of tools from one storage location to another, such as when a storage location is replaced. Moving **individual** tools is more easily accomplished using the Edit Existing Tools menu option.

Detail

1. Click Move Tools.
2. Use the navigation tree in the left column to locate and select the current storage location for the tool(s).
3. Click the Next button under the navigation tree.
4. Select the tool(s) to be moved in the center column.
 - The "Select All" box can be checked if all tools in the storage location are being moved.
5. Select the new "To" storage location in the right column and click "Move Selected Tools" to complete the action.
 - [Click here for a video demonstration.](#)



Transfer Tools

Summary

Transfer Tools is used for permanently re-locating a tool from one dealer to another. For moving tools within a dealer, use the Move Tools menu selection.

Detail

1. Click Transfer Tools.
2. Select "Tool Name" or "Tool Number" from the drop-down list.
***NOTE:** Tools may be searched by Tool Number or Tool Name. Make sure the type of search is selected correctly before inserting the search information.*
3. Enter the search criteria and click Go.
4. Select the tool(s) from the list of displayed tools by checking the box next to the tool.
5. Click Next.
6. Select the new dealer location from the dropdown list.
7. Click Transfer.
 - A confirmation message confirms the tool has been transferred.
 - [Click here for a video demonstration.](#)



Receive Transferred Tools

Summary

When tools are transferred to a dealer, they are automatically stored in the "Inbox" location. Because these tools are new to the dealer receiving the tools, they must be moved to a regular storage location before they can be checked-out.

Detail

1. Click Move Tools.
2. Using the navigation tree in the left column, select the "Inbox" location.
3. Click the Next button under the navigation tree.
4. Select the tool(s) to be moved in the center column.
 - The "Select All" box can be checked if all tools in the returned to inventory.
5. Select the new "To" storage location in the right column and click "Move Selected Tools" to complete the action.
 - [Click here for a video demonstration.](#)



Add Received Orders

Summary

When SERVICEGARD® tool orders are placed (and the tools have shipped), they are imported in the Tool Org application and can be added directly to the tool inventory.

Detail

1. Select Add Received Tools.
2. Click Select next to the order number you want to add.
 - Alternatively, you may select Remove to remove the order from the list.
3. Enter the quantity of each tool delivered in the Added Qty field, and click Next.
4. Select the location for each tool.
5. Assign an identity tag, if desired.
6. Click Submit.
7. A confirmation message confirms the tool(s) has been added.
 - [Click here for a video demonstration.](#)

Manage Assignee

Summary

Manage Assignee allows administrators to Add, Edit or Delete authorized people or entities (for example a mobile truck) permitted to check tools in and out of inventory.

It is very important to note that assignees set-up in the Tool Organization application are not the same as users who log-in to the SERVICEGARD® application. Assignees should be thought of as labels, and are used primarily when the dealer utilizes a central tool administrator who carries out tool use actions (check-in, check-out, etc.).

Detail

- To Add an Assignee:
 1. Select Manage Assignee.
 2. Enter the name of the person or non-person assignee (ex., Mobile Unit 1), and select Add.
 - [Click here for a video demonstration.](#)
- To Remove an Assignee:

NOTE: *Assignees cannot be removed until all tools checked-out by them are checked back in.*

 1. Select Manage Assignee.
 2. Find the name of the assignee from the list, and choose Select (next to the name).
 3. Select Remove.
 - [Click here for a video demonstration.](#)
- To Edit an Assignee:
 1. Select Manage Assignee.
 2. Find the name of the assignee from the list, and choose Select.
 3. Edit the entry, and select Update.
 - [Click here for a video demonstration.](#)

Reports

View Inventory Report

Summary

The View Inventory Report provides for users to view their dealership's complete inventory, and also that of any dealers in the dealer group (if applicable). Users can view and sort current inventory by Tool Number, Tool Name, Condition, Identity Tag, Location, Status and Assignee.

All reports are exported to Microsoft Excel, so it is necessary to have Excel installed in order to view the exported report.

Detail

1. Click View Inventory Report.
 - A results page showing the dealership's entire inventory is displayed.
 - For dealers in a dealer group, select the dealer you want to search (or all) from the dropdown list, then click View.
2. To save the report for easier viewing, click Export.
 - It is not recommended to select the Print button, as the report will include all tools in the dealer, and could be very long. If you are sure the report length is reasonable, the Print button can also be used to generate the report.
3. In the pop-up box, click "Open" to view the report immediately, or "Save" to save the exported file for viewing at any time.
4. To jump to a specific page, enter the page number in the Page box and click "Go".
 - You can increase the number of results per page by entering a number in the Page Size box and clicking "Change". There is a maximum of 25 results allowed per page.
 - [Click here for a video demonstration.](#)

Tools by Location

Summary

The Tools by Location Report page provides for users to view their dealership's complete inventory by storage location, and also that of any dealers in the dealer group (if applicable).

Detail

1. Click Tools by Location.
 - A results page showing all of the dealership's storage locations is displayed on the left.
 - For dealers in a dealer group, select the dealer you want to search (or all) from the dropdown list, then click View.
2. Use the navigation tree in the left column to locate and select the current storage location for the tool(s).
3. Click the Next button under the navigation tree.
4. To save the report for easier viewing, click Export.
 - Use discretion when using the Print button, as the report will include all tools in the storage location, and could be very long. If you are sure the report length is reasonable, the Print button can also be used to generate the report.
5. In the pop-up box, click "Open" to view the report immediately, or "Save" to save the exported file for viewing at any time.
 - [Click here for a video demonstration.](#)



Tools by Status

Summary

The Tools by Status Report provides for users to view their dealership's inventory by status (i.e. Checked-In or Checked-Out). It also provides for searching status of tools within the dealer group, if applicable. Using the filters allows specific dates or ranges of dates to be displayed.

Detail

1. Click Tools by Status.
2. Select the dealer, status, assignee, and date range from the dropdown menus.
 - "Status" and "Assignee" are optional, but will allow for more specific results when the report is run.
 - You must select an End Date, or the report will not show accurate results.
3. Click Submit.
 - The results are shown.
4. To save the report for easier viewing, click Export.
 - The Print button can also be used to generate the report.
5. In the pop-up box, click "Open" to view the report immediately, or "Save" to save the exported file for viewing at any time.
 - [Click here for a video demonstration.](#)

Tool History

Summary

Use the Tool History report to retrieve the complete history of a specific tool in the dealership's inventory, or within any dealer in the dealer group (if applicable).

Detail

1. Click Tool History.
2. Select the dealer to be searched and click View.
3. Select "Tool Name" or "Tool Number" from the drop-down list.

NOTE: Tools may be searched by Tool Number, Tool Name, or Assignee. Make sure the type of search is selected correctly before inserting the search information.

4. Enter the search criteria and click Submit.
5. To view the specific tool history, click on the "book icon" next to the Tool Number.
 - A listing of the tool history along with filtering functions is displayed.
 - After the tool history is displayed on the right, you can narrow the search by entering specific dates in the Filter by Date boxes and clicking "Filter by Date", and/or by selecting a specific Assignee.
6. To save the report for easier viewing, click Export.
 - The Print button can also be used to generate the report.
7. In the pop-up box, click "Open" to view the report immediately, or "Save" to save the exported file for viewing at any time.
 - [Click here for a video demonstration.](#)



Inventory Favorites

Overview

To facilitate tool searches, Tool Organizer includes the ability to set-up favorites: groups of commonly used tools. Using favorites is convenient for setting up groups of tools that are used frequently, or for setting up a collection of tools for a specific job (for instance, a set up flywheel tools for a particular engine).

For dealer groups, two types of favorites are available: "Dealer" and "Shared". Dealer favorites are only viewable (and usable) in the dealership that sets them up. Shared favorites are viewable by all dealers in the dealer group, and can be requested by those dealers.

View Favorites

Summary

Dealer Favorites: Viewing Dealer Favorites displays all of the favorites set-up within that dealership.

Shared Favorites: Viewing Shared Favorites displays all shared favorites set-up and viewable by the entire dealer group.

All favorites (Dealer and Shared) can be viewed concurrently by selecting View All in the Inventory Favorites menu.

Detail

- Follow the path, below, for the type of favorite desired:
 - Only steps 1 & 2 need to be performed in order to view the favorites.
 - Steps 3-5 are for carrying out action on the favorites.

Dealer Favorite

1. In the Inventory Favorites menu, select Dealer.
2. Select the favorite from the dropdown menu.
 - The favorite is displayed on the screen.
3. Select the tool(s) from the list of displayed tools by clicking the checkbox next to the tool.
 - You can also click the box at the top of the tools to select all.
4. Select the action to be carried out on the tools by using the Select Inventory Action dropdown menu.
5. Click Submit.
 - A confirmation message confirms the tool action.

Shared Favorite

1. In the Inventory Favorites menu, select Shared.
2. Select the favorite from the dropdown menu.
 - The favorite is displayed on the screen.
3. Select the tool(s) from the list of displayed tools by clicking the checkbox next to the tool.
 - You can also click the box at the top of the tools to select all.
4. Select the action to be carried out on the tools by using the Select Inventory Action dropdown menu.
5. Click Submit.
 - A confirmation message confirms the tool action.

Notes:

- [Click here for a video demonstration.](#)



Set-Up Favorites

Summary

Set-Up Favorites creates the favorites. For dealer groups, when setting up a favorite it is important to decide whether the favorite is private to the dealer that created it (Dealer) or available for other dealers in the group (Shared). Shared favorites are usable (and editable) by dealers other than the dealer that created the favorite.

Detail

1. Locate one of the tools for the favorite by using the Search function. See Search, in this manual, for more information.
2. Select the tool to start the favorite by checking the box next to the tool.
3. At the bottom left of the screen, click Favorites (or the plus sign next to Favorites) to open the Favorites dialog box.
4. Click Create New Favorite.
5. Select either "Dealer" or "Shared".
6. Give the favorite a name in the Favorite Name text box.
7. Click Save.
 - A confirmation message confirms the favorite has been set-up.
8. To add tools to the favorite, see Edit Favorites, in this manual.
 - [Click here for a video demonstration.](#)

Edit Favorites

Summary

Edit Favorites provides for editing existing favorites, and deleting existing favorites. The favorites can also be renamed.

Be cautious when working with Shared favorites. It is possible to edit and/or delete a shared favorite that was created by another dealer, negatively impacting their performance.

Detail

- To remove tools from a favorite, or edit favorite details:
 1. In the Inventory Favorites menu, select View All.
 2. Select the favorite to be edited by clicking Select next to the favorite.
 - Dealer favorites are labeled "Customer" in the Scope column, while Shared favorites are labeled "OwnerGroup".
 3. Remove tools from the favorite by selected the X next to the tool, or edit the type of favorite (Dealer, Shared) or favorite name.
 4. Click Save.
 - A confirmation message confirms the favorite was updated.
 - [Click here for a video demonstration](#).
- To add tools to a favorite:
 1. Use Search to locate the tool you want to add to a favorite.
 2. Check the box next to the tool.
 3. Click Favorites at the bottom left of the screen.
 4. In the dropdown menu, select the favorite you want to add the tool to.
 5. Review the information, and click Save.
 - A confirmation message confirms the favorite was updated.
 - [Click here for a video demonstration](#).



- To delete a favorite:

NOTE: When you select *Delete Favorite*, the favorite is immediately deleted and cannot be recovered. Make sure all information is correct before clicking *Delete Favorite*.

1. In the Inventory Favorites menu, select View All.
2. Select the favorite to be deleted by clicking Edit next to the favorite.
 - Dealer favorites are labeled "Customer" in the Scope column, while Shared favorites are labeled "OwnerGroup".
3. Click Delete Favorite.
 - A confirmation message confirms the favorite was deleted.
 - [Click here for a video demonstration](#).



Tips and Frequently Asked Questions (FAQs)

This section provides some tips that can be helpful in your ability to use the John Deere Tool Organizer. The tips are arranged as FAQs that may assist in answering some common questions.

1. Why am I getting errors when I run validation on the Template after importing data from our own spreadsheet?

Verify that any hyphens in the tool number are entered in the correct place, and look for other typos (such as a zero '0' typed as an o 'O').

2. Can I set-up the e-mail notification to notify more than one person in the dealer?

This cannot be done within the Tool Organization application; however, this can be done by setting-up an e-mail group in your dealer's e-mail application (such as Outlook). Once the group is set-up, enter the group e-mail address in the Tool Organizer application as the notification address.

3. My company restricts access to YouTube. Is there another way to see the User Guide videos?

No. At this time, the videos are only available through the links in the User Guide. The videos compliment the text in the User Guide, but are not necessary to understand the application.

4. I want to be able to check-out a tool to a customer. How can I do this?

Set-up the customer as an Assignee. The tool can then be assigned to the customer on check-out.

5. Can my dealer borrow a tool from a dealer while it is loaned to another dealer?

In order for this to occur within the Tool Organizer application, the dealer that is currently using the tool must return it, then the originating dealer can loan the tool to the second requesting dealer. Keep in mind that the tool does not have to be *physically* returned to the originating dealer – it can go directly to the second requesting dealer.

6. I am having difficulty locating a custom tool in our inventory when using the Search function. Are there any suggestions?

It is recommended that your dealer (or dealer group) develops a consistent, logical method of naming custom tools so that the tool numbers are consistent and can be searched more easily. For example:

- Wrenches could be labeled as "WR-13mm-C", where 'WR' means 'wrench', '13mm' designates the size, and 'C' indicates the type of wrench (in this case, a combination wrench).
- Sockets could be labeled as "SO-7/8in-12", where 'SO' means 'socket', '7/8in' designates the size, and '12' indicates the type of socket (in this case, a 12-point socket).

7. Can I see a report of tools by condition?

This can be accomplished by running "View Tool Inventory", exporting the spreadsheet, and sorting the column by "Condition".