Desktop to Cloud Quick Reference Guide

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Lists & Navigator Tabs

This guide shows a high level view of where the Desktop List tab features and the Navigator Tab features are located in the Cloud version of ToolWatch.



Tool & Material Browser

- 1. The Tools and Material browsers are now both located under the Inventory section within the **Item Browser**.
- 2. Toggle between Tools & Equipment and Materials & Consumables to access each browser..



Tool Kits

- 1. Select your item(s)
- 2. Use the Action Menu or right-click your selected items and select **Add to Kit** to add them to a Took Kit.

Lists Navigator Org Tree Navigator P X	Item Browser AlignOps	× +				- 🗆 X
Tools & Equipment	← → ♂ 🗳 cloud.alig	gntech.co/items?type=T&categories	=947e0684-0a1a-4edb-9c38-ef	9644522f5e,5be53003-7	. e. 🛧 👩 😂 🝊 😭	D 🕒 :
🔊 Tools	Sandbox					
Tool Models	■	Asset Safety				ଡ 🗛 🕚
Tool Kits	Main Warehouse	Tools & Equipment Materials & Consumables	What are you looking for?		Q Advanced	Search
🚳 Manage Retired Tools		Categories	Show Fully Allocate			
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	Item Browser	Gators				-
	Low Level Browser	Generator	Saw Blades	81001 1	001 12" 60T Miter Saw	Q
System Dashboard	Job Stock	Saw Blades	Tape Measure	96001 1	Add Item	4
Tools & Equipment	Manage Retired Tools	Screwdrivers Tape Measure	Backhoet	93001 1	Export	
		Trucks Itility Kolfe	Generator	85002 51	002 Add Attachment	E
Materials & Consumables	ジ를 Service and Calibration	< Comy write	Generator	85003 5	Add To Transfer	E
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Service a Calibration		C	Extension Cords	95001 1	001 Change Status	Q
Purchasing & Receiving	iask Management		 Extension Cords 	95001 1	Change Department	Q
A Job Cost & Billing	Reports and Graphs	`	Extension Cords	95001 1	001 Change Item Class	Q
	(🖄) Tracking	<	Extension Cords	95001 1	001 Change Return Date	Q
Reports & Graphs		< .	Utility Knife	21001	001 Remove Inventory Record	
Administration	🛱 Recycle Bin		Trucks	91004 2	Add To Kit	
1000°	🛠 What's New		Trucks	91001	Add To Pick Ticket	E
C Recycle Bin			•		Add To Purchase Order	F F

View Catalog

- 1. The Catalog is located under the Inventory section.
- 2. This is where you can toggle between Tracked products and the Product Catalog.



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Reports

- 1. Within the Tools & Equipment or Materials & Consumables browser, select your item(s)
- 2. Use the Action Menu or right-click your selected items and select Print.



Pick Tickets & Transfers

• Pick Tickets & Transfers are located under the Inventory Movement section.

Lists Navigator	Pick Tickets AlignOps	× +						>
Pick Tickets & Transfers	← → C S cloud.aligntech	.co/tickets/picks				@ ☆	00/	晴 ជា 🍈
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Fick Tickets	Main Warehouse 🗸	+ Create Ticket	Pick This Ticket					}≞≞
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E. Reports	Pick Tickets	Date	01/14/2024 🗂 to	mm/dd/yyyy 🗆				
Tools & Equipment	Requisition Browser	Intions						
Materials & Consumables	Count Tickets	Number	Collabo	rate 🕈	Created \$	State \$	Statu	•
Pick Tickets & Transfers	Templates	_						
Service & Calibration	Requisitions Home	2	Q		08/09/2024 03:47 F	M Closed	Compl	lete
	Request History	3	Q		08/09/2024 03:57 F	M Open	In Pro	gress
Purchasing & Receiving	Returns Home	7	Q		08/15/2024 04:44 F	M Open	Ready	to Pick
🥏 Job Cost & Billing	Returns History	9	0		01/28/2025 09:09 /	M Open	In Pro	gress
Reports & Graphs	🗐 Task Management 🛛 <	11	Q		02/13/2025 09:59 /	M Open	Ready	to Pick
() Administration	Reports and Graphs <	4			Showing 6 rows			ø -
Recycle Bin	ANT Tenstona 6							

Service & Calibration

• Service & Calibration is located under the Service and Calibration section.



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Purchasing & Receiving

• Purchasing & Receiving is located under the **Purchasing** section.

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Lists Navigator Navigator P X	← → ♂ 🔩 cloud.alignt	tech.co/purchasing/purchase-orders/	역 ☆ 🛛 🗢 👍 🕞 한 🛛 🚳 🗄
Purchasing & Receiving	Sandbox		A
Purchase Orders		Asset Safety + Create Purchase Order 🖨 Receive Purchase Order 🖨 Print	© A ●
Receiving Tickets	🗠 Dashboards	Browse Purchase Orders	Open Oclosed All Search
Reports	🔀 Inventory <	PO Charg	e To 🗸 Clear
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Tools & Equipment	🛱 Purchasing	V Np To Expect	ted 01/14/202 Date mm/dd/yy D
Materials & Consumables	Purchase Orders	atus All 🗸 🗸	
Pick Tickets & Transfers	Receiving Tickets	ons No item selected Purchase	Order / Item View
Service & Calibration	Reports and Graphs <	Order Date 🗣 🦻 Po No. 🗘 Vendor 🗘	Charge To 🇣 Ship To 🇣 Status 🕈
Purchasing & Receiving	(炎) Tracking <	2/14/2025 8 Grainger	Main Warehouse Waiting for Receipts
Job Cost & Billing	Administration <		
Reports & Graphs	دَيَّ Recycle Bin		
Administration	Feedback		
C Recycle Bin			,

Job Cost & Billing

• Job Cost & Billing is located under the **Job Cost and Billing** section.

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Job Cost & Billing	← → ♂ 😫 cloud.aligntech.co/billing/	 A 🖞 0 A 🖓 0 A 🖓 0 A 🖓 0
📸 Billing Browser	Sandbox	
Rate Sheets	Asset Safety	⑦ ¢ ●
🐉 Equipment Usage Log	Main Warehouse	🗟 Calculate 🕹 Post 🕂 Add Misc. Charge/Credit 📲 Delete Misc. Charge/Credit 📿 Refresh
Export Templates	Constitution of the second sec	joo Cost 🔹 🔹 Display entries for: 🔯 Tools & Equipment 🐻 Materials & Consumables
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	Transmission	Legacy General Conditions 10/19/2023
Reports	🗐 Job Cost and Billing 🛛 🗡	Legacy General Conditions 10/19/2023
	Billing Browser	Legacy General Conditions 10/19/2023
Materials & Consumables	Invoice Browser	Legacy Service 10/19/2023
	Rate Sheets	Legacy General Conditions 10/19/2023
Pick Tickets & Transfers	Company Calendar	Stoneybrook 10/19/2023
Service & Calibration	Equipment Usage Log	Stoneybrook 10/19/2023
Purchasing & Receiving	Export Templates	Stoneybrook 10/10/2023
ab Cost & Billing	Export Data	Stoneybrook 10/19/2023
Reports & Graphs	وي Reports and Graphs من المنابع (C2) Tracking ح	Showing 13 rows
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C Recycle Bin		

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Reports & Graphs

• Reports & Graphs is located under the **Reports and Graphs** section.



Lists and Administration: Settings

The following Lists features are located under the Settings section.

To locate the highlighted list in the Cloud:

- 1. Expand the Administration section
- 2. Expand Settings
- 3. Select desired feature



List and Administration: Company Lists

The following Lists features are located under the **Company Lists** section. To locate the highlighted list in the Cloud:

- 1. Expand the Administration section
- 2. Expand Company Lists
- 3. Select desired feature



Navigator and Administration in Cloud (Part 1)

Change My Password and User Preferences are located in Settings.

To locate these in the Cloud:

- 1. Select the Image Icon
- 2. Select Settings

Lists Navigator Navigator 7 X			
Administration	User Preferences AlignO	ps × +	- ¤ ×
Configure User Roles	← → C ≅ cloud.ali	gntech.co/administration/user-preferences	९ 🖈 💿 🌣 🐴 🔂 छे। 🚇 स
Data Loader	A 1	E Asset Safety	@ ¢ 💽
31 Company Calendar	Main Warehouse	Change Password	Vino Rodriguez vradrigues 31@candboor Settings (2)
Company Settings	☆ Dashboards 왕 Inventory 글 Inventory Movement	< New Password:	togish -
	歪 Service and Calibration	< Confirm Password: <	
Tools & Equipment	Job Cost and Billing	< Submit	
Waterials & Consumables	녕 Reports and Graphs (&) Tracking 오와 Administration	User Preferences	
Service & Calibration	🛱 Recycle Bin	Notifications	
Purchasing & Receiving	Vihat's New	Verified phone number for SMS notifications:	
Job Cost & Billing	누르 Feedback	No vermea priorie number set	
Reports & Graphs		Notify me when	By email By SMS
Recycle Bin		PLA TICKING AT REQUISING AT A LOCADON I SUDPRIVISE	

Navigator and Administration in Cloud (Part 2)

Configure User Roles, Data Loader, and Company Settings are located under the **Administration** section.

To locate these in the Cloud:

- 1. Expand the Administration section.
- 2. Select desired feature.



Navigator and Administration in Cloud (Part 3)

- The Company Calendar is located in the Job Cost and Billing section.
- Sensors is renamed to Wireless Tags and is located in the Tracking section.

