

# User Guide

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## Introduction:

We are so excited that you've chosen to begin your journey with ToteScan. Whether you are in the process of moving, organizing, doing small business inventory, or just want to be able to find the things you've stored, ToteScan is there for you.

In this user guide you will find installation instructions, a quick start section, in-depth usage sections based on function, and so much more.

The organization of the sections is first we show you a screenshot that has numbered call-outs. Next you will see "The Basics", which is a summary of the screen/section and what its purpose is. After "The Basics", is a page or pages of the numbered call-outs defined a bit more.

If you have any questions at anytime (day or night), please reach out to us at [support@totescan.com](mailto:support@totescan.com) and we will be happy to assist. We love feedback and feature requests as well, so send them our way :)



# User Guide

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## Table of Contents:

### Page

<b>3</b>	<b>App Install</b>
<b>7</b>	<b>Quick Start</b>
<b>14</b>	<b>My Totes (ToteScan label view)</b>
<b>18</b>	<b>Tote Info</b>
<b>21</b>	<b>Edit Tote Info</b>
<b>24</b>	<b>Item Info</b>
<b>27</b>	<b>Add/Edit Item Info</b>
<b>30</b>	<b>Buy ToteScan labels</b>
<b>33</b>	<b>Settings/Miscellaneous</b>
<b>39</b>	<b>Send/Receive Totes (for Movers and Professional Organizers)</b>
<b>40</b>	<b>Setup/Usage ToteScan with Alexa</b>
<b>43</b>	<b>FAQ/Tips</b>
<b>45</b>	<b>Conclusion</b>

# ToteScan App Install

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## Step 1 (Download ToteScan app):

Download the ToteScan™ app for your phone. Tap the link below for your device's app store, or go to your phone's app store and search for "ToteScan". You can also scan the QR code below each store to go to the ToteScan app page to download.

Once downloaded/installed, tap the ToteScan icon to open the app.



Scan for App Store



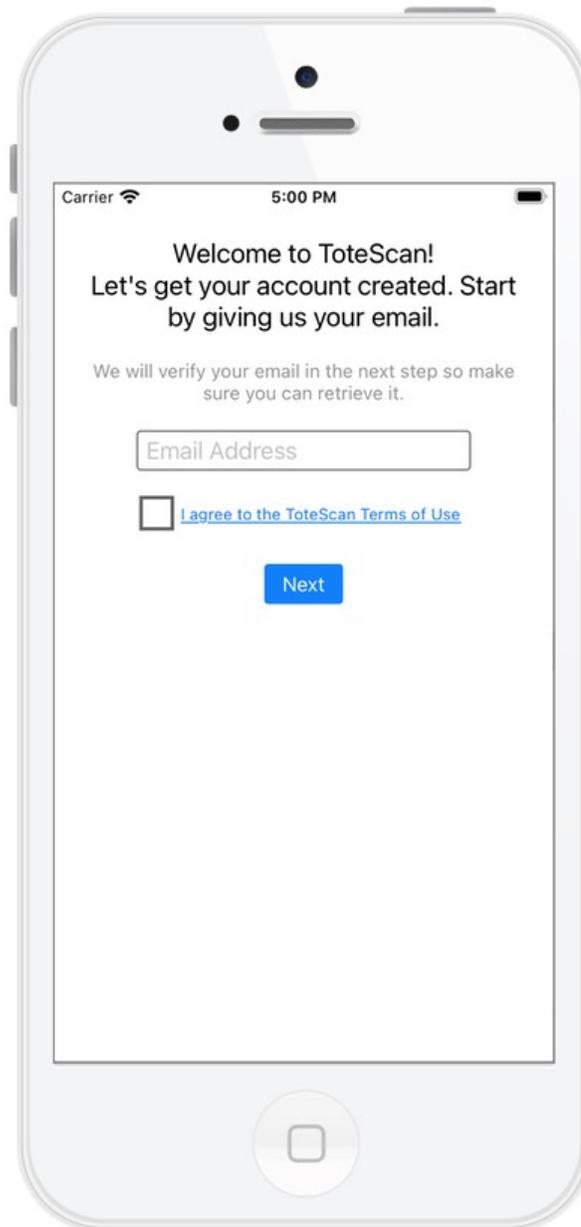
Scan for Google Play

# ToteScan App Install

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## Step 2 (Enter Email):

Type in the email address and review the Terms of Use. Tap Next when complete.

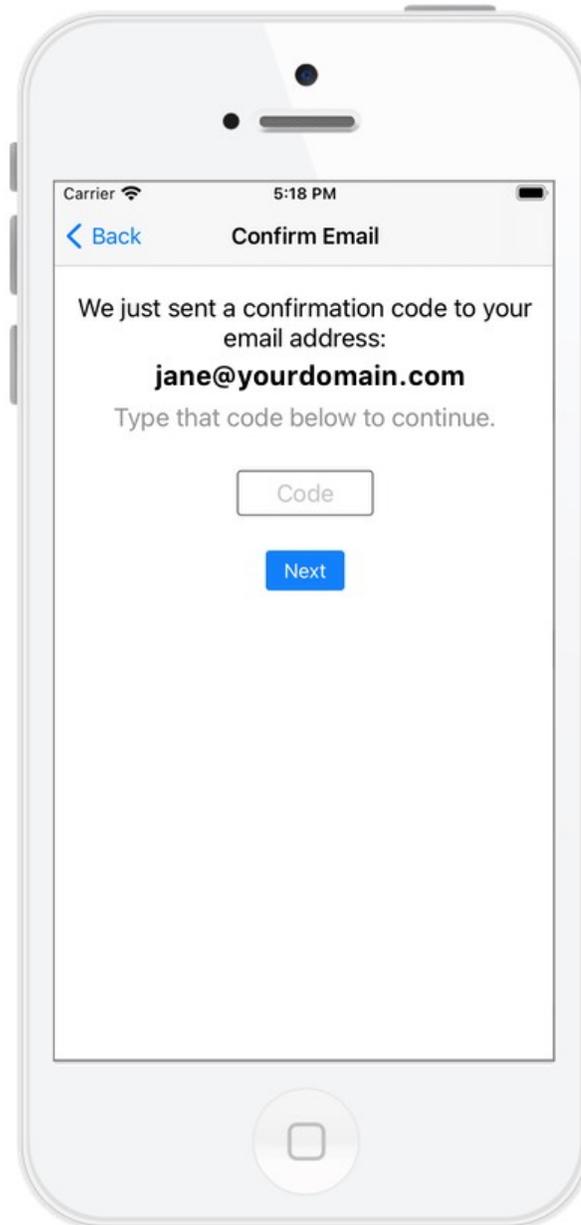


# ToteScan App Install

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## Step 3 (Confirm Email):

You will receive an email from us with a confirmation code. Once received, type that code and tap Next.



**Tip:** Make sure you verify visually this email address. We will send a confirmation code in the next step.

# ToteScan App Install

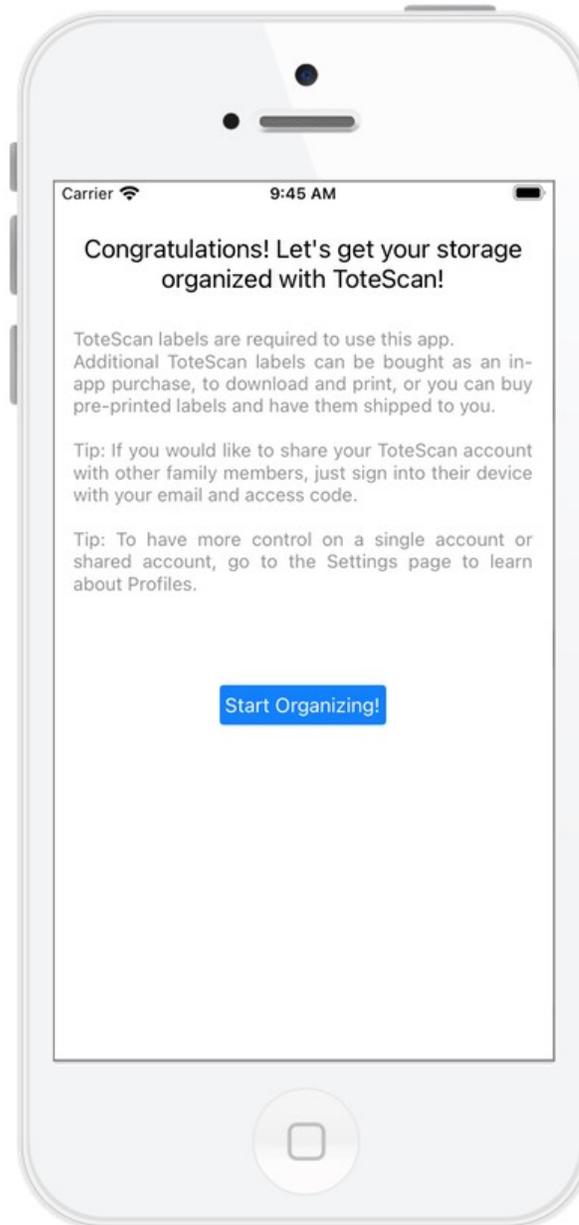
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## Step 4 (Congratulations):

Great! You are all set and registered with the ToteScan app and service. Tap “Start Organizing” to continue.

**Tip:** If you want to share your account with someone else in your household, make sure to sign into their device with the same email you used to register ToteScan (see step 2)

*\* While it is possible to change your email address later (email us at [support@totescan.com](mailto:support@totescan.com)), it is advised to use whichever email you want for your official ToteScan account and data store.*



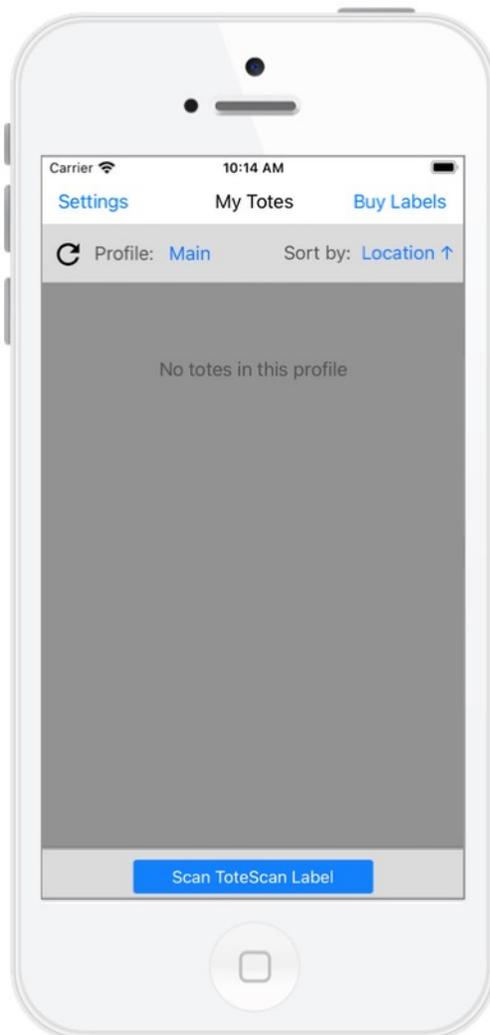
# Quick Start

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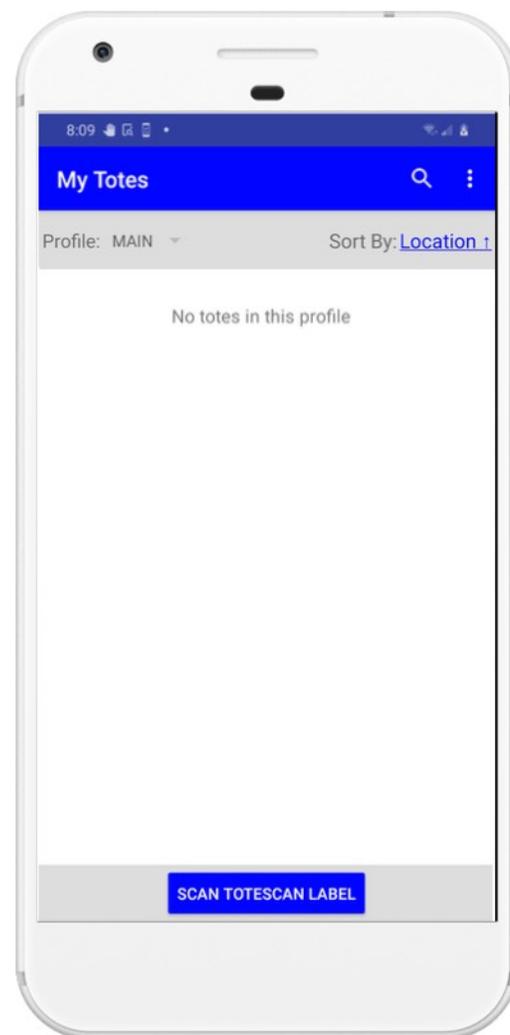
## Step 1 (Top Level “My Totes”):

If this is your first time using the ToteScan app you will see “No totes in this profile.” This is normal. You have not scanned any of your ToteScan labels yet. Once you do that, you will see your labels listed here.

### iOS



### Android



# Quick Start

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## Step 2 (Place ToteScan label):

Using your ToteScan peel and stick labels (or in-app purchased/downloaded labels you've printed), place the label onto your storage tote/box/container/etc.



# Quick Start

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## Step 3 (Scan ToteScan label):

Once the label is attached, tap the “Scan ToteScan Label” from the “My Totes” screen. Hold the camera so the label comes into view. It will automatically scan. On iOS you can tap the “Multiple” option to scan multiple ToteScan labels at once. If scanning in single mode or on Android, make sure to cover up the other ToteScan labels if you are scanning from your label sheet. You can also turn on the light (iOS) to illuminate low-light areas.

### iOS



### Android



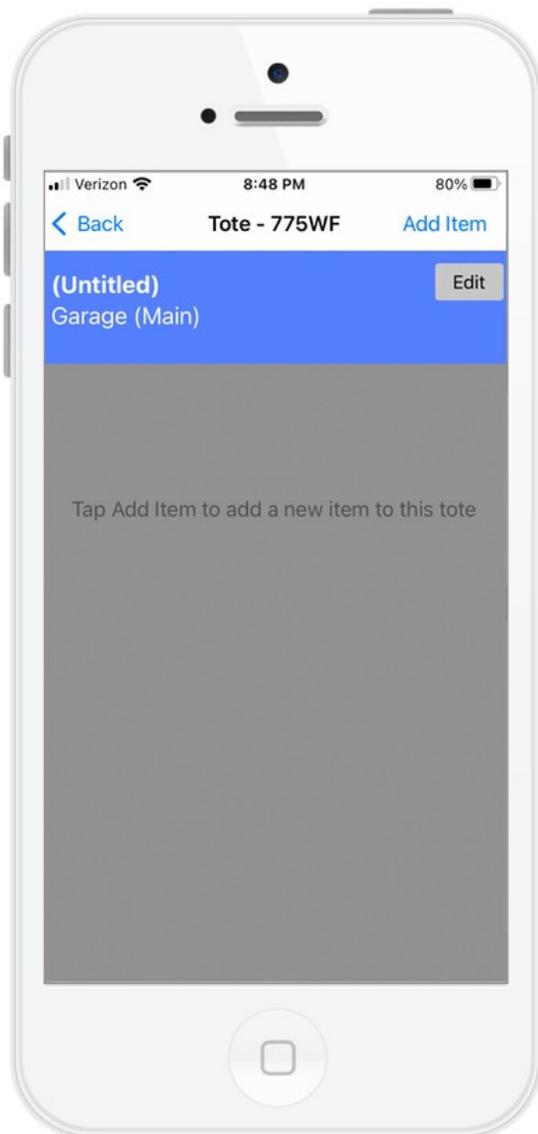
# Quick Start

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## Step 4 (View Tote Info):

Once scanned successfully, you will see the top level of that ToteScan label. It will be Untitled, and in its default location of Garage. The screenshots below are showing a brand new ToteScan label with no items yet added. *You can edit the ToteScan label info, but we will cover that in the full section later on.*

### iOS



### Android



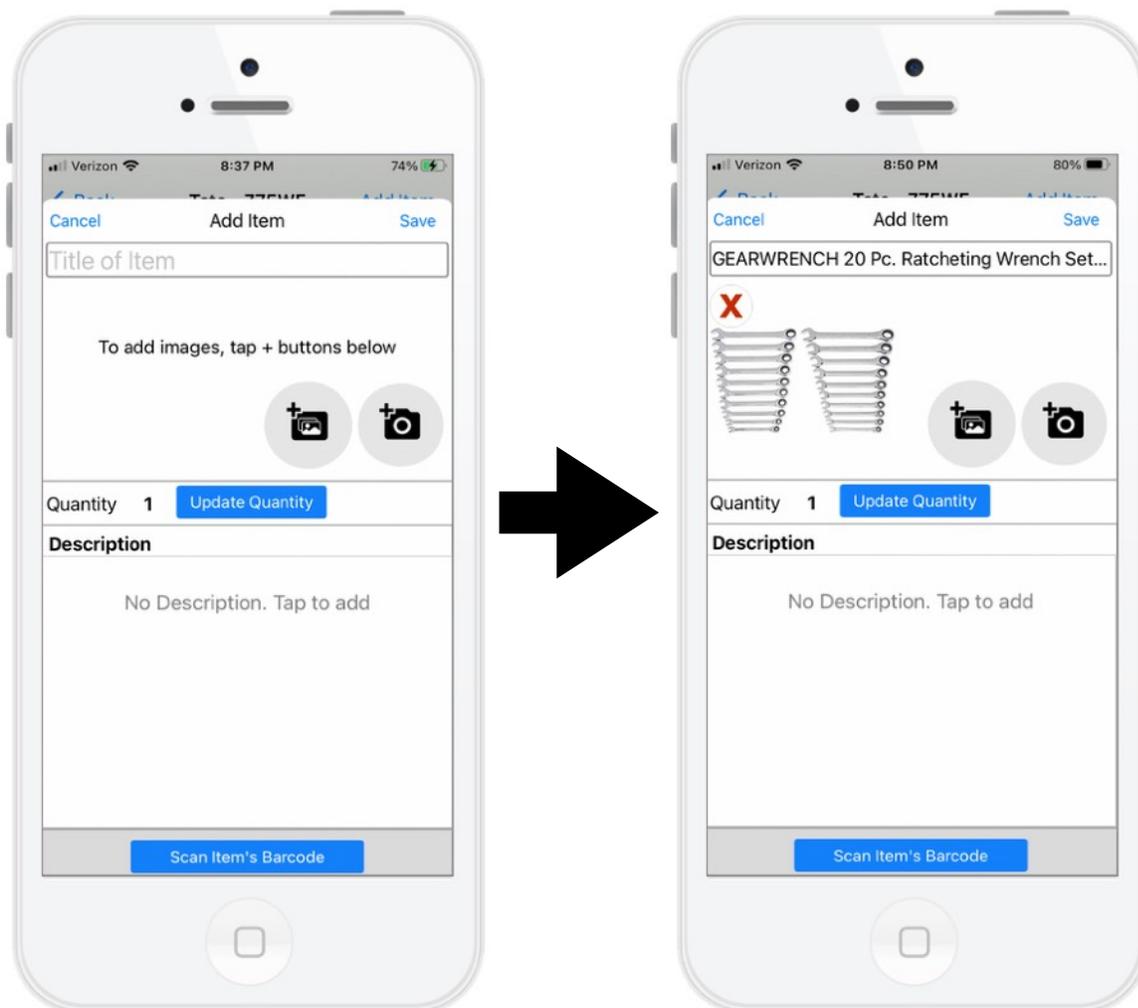
# Quick Start

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## Step 5 (Add one or more items):

After saving your Tote top level information for that ToteScan label, you can then tap on “Add Item” to start a new item to place into your tote/box/container. Set the title, quantity (if you have more than one of those items), add photos (up to 20), and description. If the item you are placing into the tote/box/container has its own UPC bar code, tap “Scan Item’s Barcode” to scan and pre-populate the item’s info.

*Note: some UPC codes will not scan, and can be due to a number of things notwithstanding the manufacturer may not be using or have world registered the UPC code, or they may even be using someone else’s UPC code for their product.*



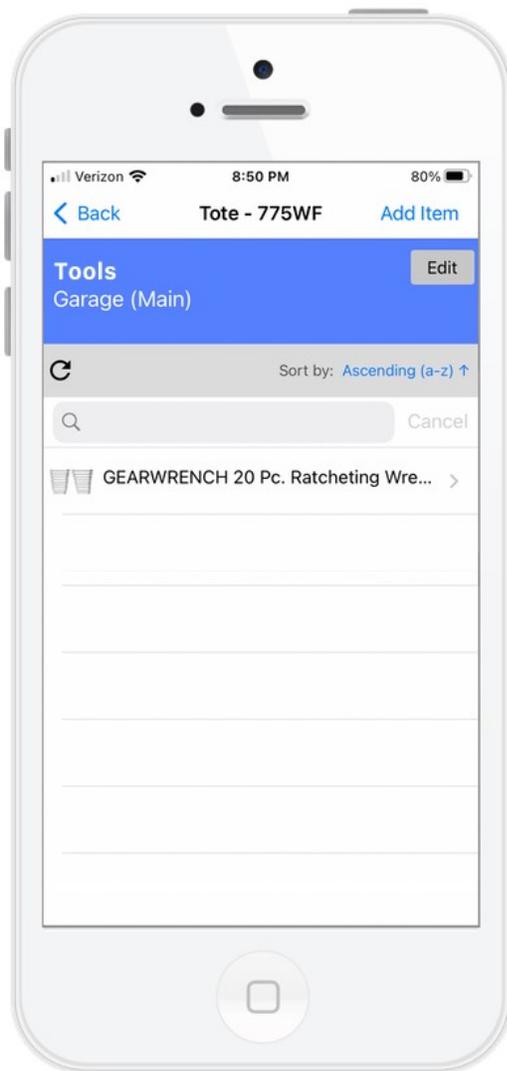
# Quick Start

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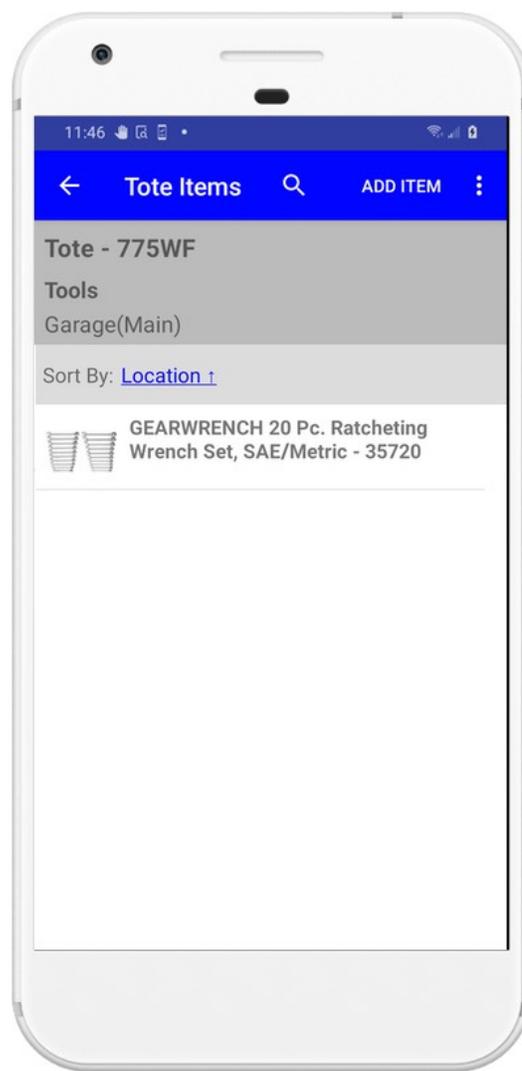
## Step 6 (Tote Info):

Once you've saved your new item, you will be returned to the ToteScan label's Tote Items screen. You should now see your newly added item. Add additional items and when complete tap the back arrow. There is no limit to the amount of items a ToteScan label can contain. In this example, the ToteScan label was edited and the title set to "Tools". Editing labels is covered later in this manual.

### iOS



### Android



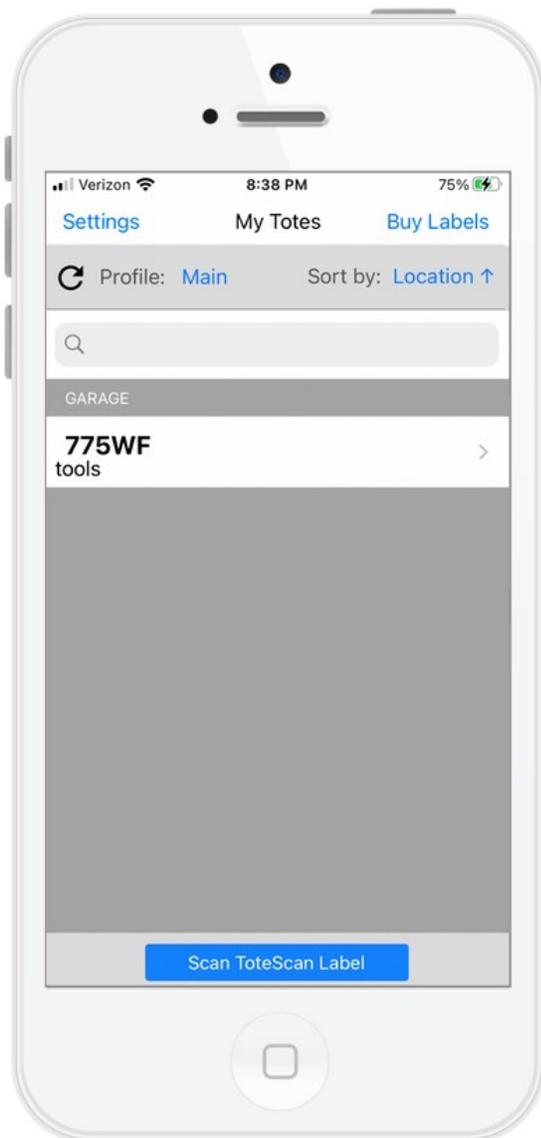
# Quick Start

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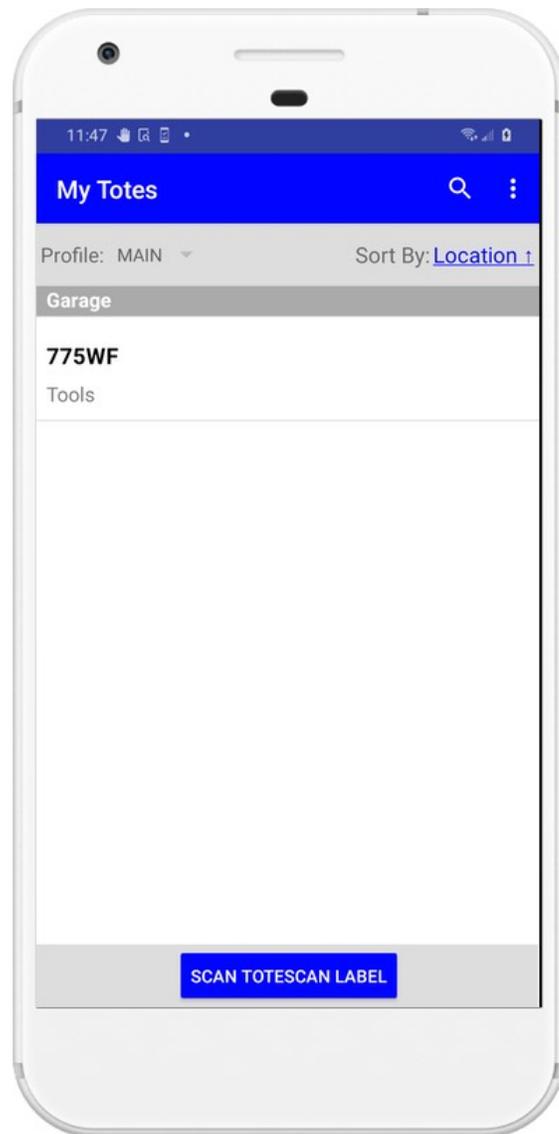
## Step 7 (Top level ToteScan labels):

Your “My Totes” top level will now show the newly added ToteScan label you’ve scanned and to which you’ve added items.

iOS



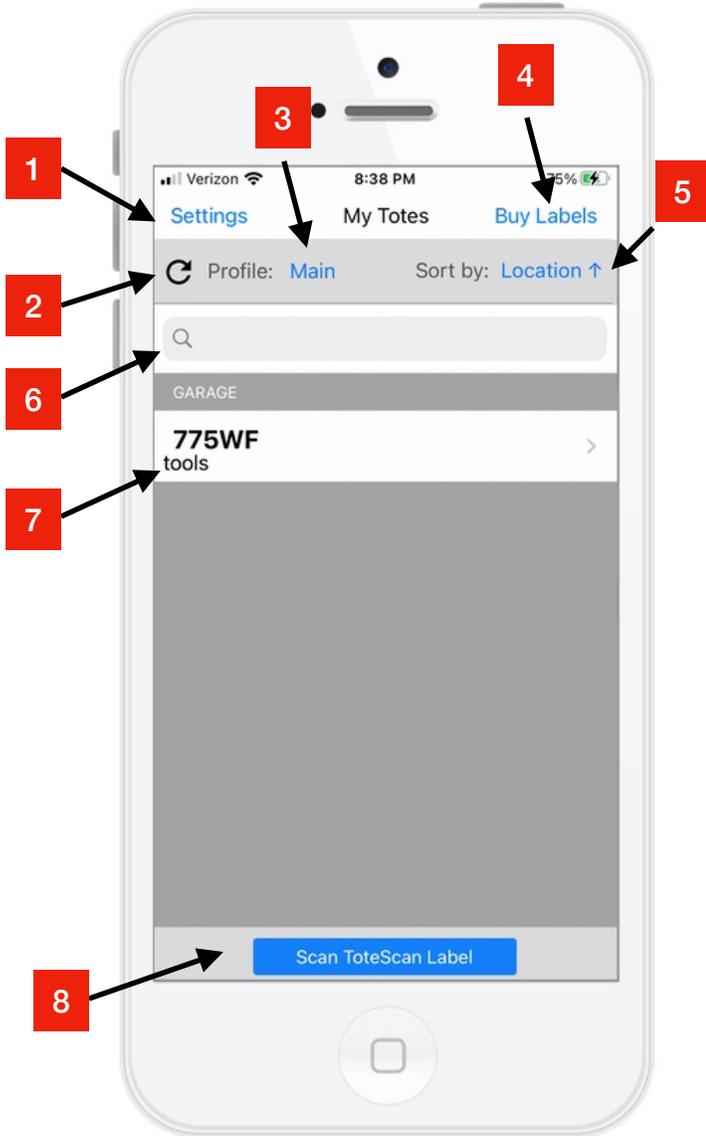
Android



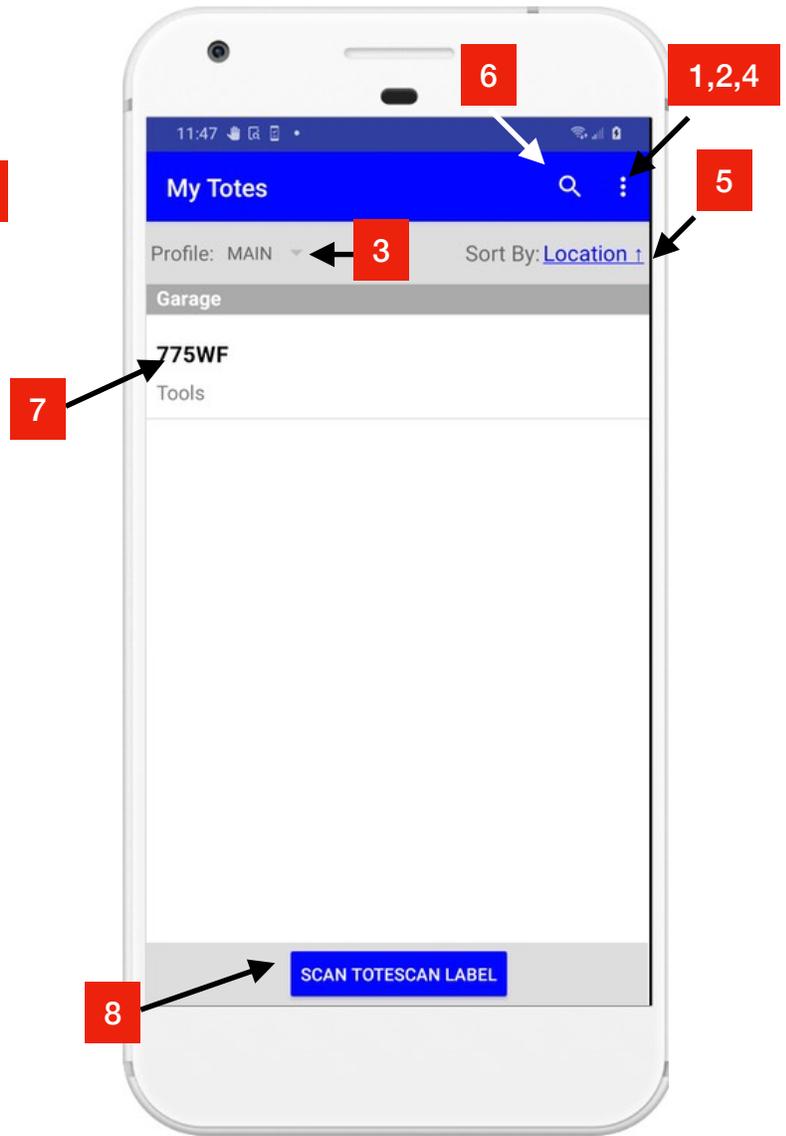
# My Totes (ToteScan label view)

## Overall Layout:

iOS



Android



1 - Settings (Misc.)

2 - Refresh List

3 - Profile Selector

4 - Buy Labels (downloaded or shipped)

5 - List Sorting Options

6 - Text Search

7 - List of Totes or Items

8 - Scan a ToteScan Label

# My Totes (ToteScan label view)

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## The Basics:

The My Totes top level is the main view you will see when launching the ToteScan app. It will normally list out the ToteScan labels (totes) that are in your account. They will be initially grouped by Location, but you can change the Sort By at anytime.

By pulling down on the list of items and then letting go, it will initiate a refresh of the data (you might need to do this if you are actively sharing your ToteScan account with someone who might be modifying the same data).

You can initiate a search by Tapping on the text entry box where you see the magnifying glass icon. The search happens live as you type characters. It will initially search both ToteScan labels (totes) as well as the items you've placed into those labels. Once you've started searching, you can choose to Filter the results. You can choose None (meaning it will search in both ToteScan labels, as well as items), Totes Only (ToteScan labels), or Items Only. To clear your search, tap the cancel or X.

For Totes, you will see the 5 digit alphanumeric code that appears on your ToteScan label, along with the Title you've assigned. Tapping on a Tote will bring up the Tote Info screen.

For Items, you will see a thumbnail image (if you've assigned pics to the item), along with its Title and a portion of the Description. Tapping on an Item will bring up the Item Info screen.

If you wish to clear a ToteScan label of its contents and make it "new" again for re-use, tap/hold/drag to the left to reveal the clear/delete option. This will clear the label, and delete all items within it, so make sure this is what you want.

## My Totes (ToteScan label view)

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### The Basics: (continued):

If you no longer need a ToteScan label due to damage or loss, you can remove it from your account. Simply tap/hold/drag to the left to reveal the clear/delete option. When asked, choose delete, and confirm on-screen. This will remove this ToteScan label (tote) from your account and will delete any items within that ToteScan label (tote). So make sure this is what you want.

To Scan a new or existing ToteScan label, tap on the “Scan ToteScan Label” button and point the camera at the label.

# My Totes (ToteScan label view)

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## Overall Layout Definitions:

**1 - Settings:** This will bring up the Settings screen which lists your account email, recovery email, custom locations, custom profiles, requesting inventories, etc. Please refer to the Settings area of this user guide for a more in-depth discussion.

**2 - Refresh list:** This will refresh the data on-screen. You can do so by either tapping the refresh icon or pulling down and letting go on the Tote/Item list.

**3 - Profile selector:** This will show a list of profiles that you've created. Profiles are collections you can set up, and are discussed in the Settings area of this user guide. Tap the profile name to list/change profiles.

**4 - Buy labels:** ToteScan labels can be purchased for either download (to be delivered as a PDF for you to print the labels yourself), or through our retail website where we will ship you peel & stick ready-to-go ToteScan labels. More detail is provided on the Buy Labels section of this user guide.

**5 - List sorting options:** You can sort the list of ToteScan labels by Location, Title, Tote ID (the 5 digit alphanumeric code on the label) or by Date Added. (Date Added is when the label was first scanned into your account). You can also specify the sort order (A thru Z or Z thru A alphabetical order). Tap the sort by criteria to list/change the sort option.

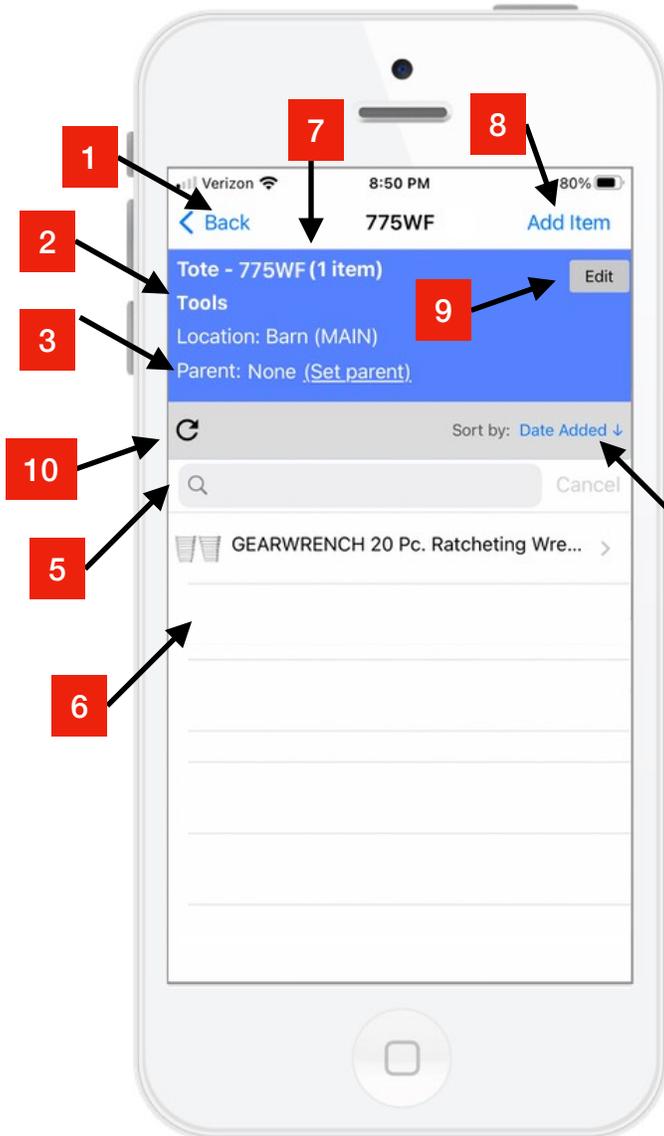
**6 - Text keyword search:** The search from My Totes level will do a keyword(s) search on the alphanumeric code of the label, the title of the label, any part of the title of any items, or any part of the description of any items.

**7 - List of Totes and/or Items:** This is the main list that will show ToteScan labels and/or items depending on if you are in search mode or not.

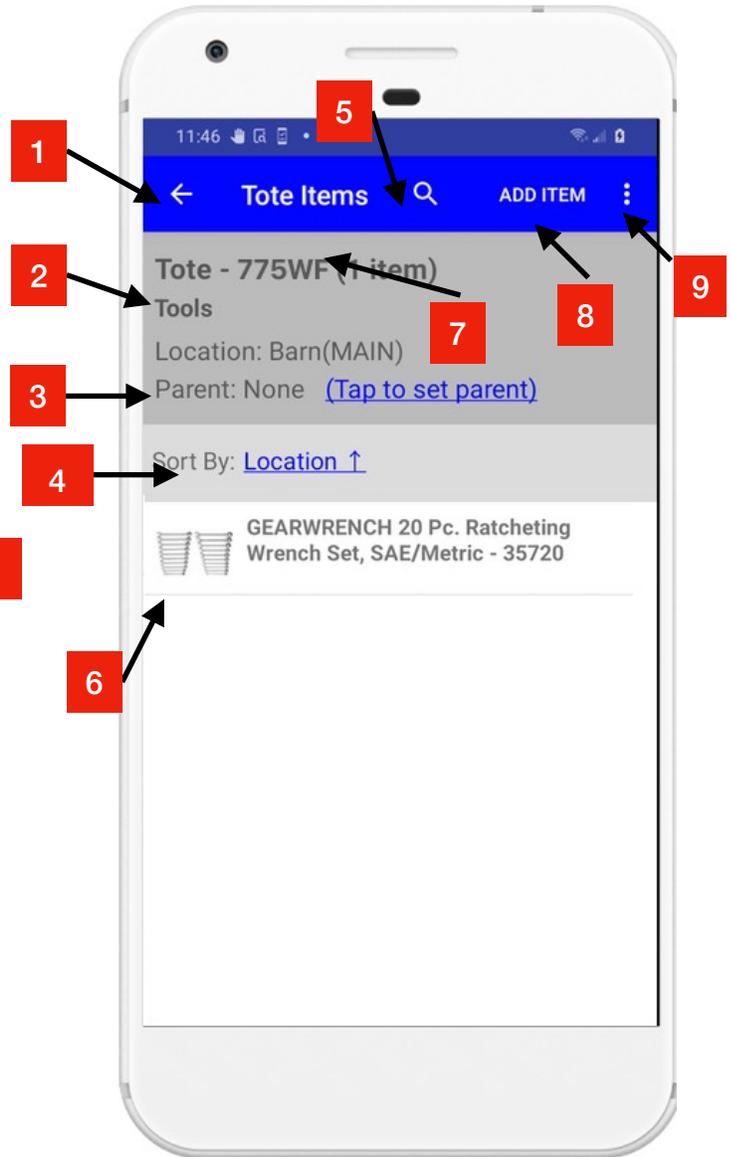
**8 - Scan a ToteScan label:** Scanning is used to scan a ToteScan label. When you scan a brand new ToteScan label it will be assigned to your account for your use only.

# Tote Info View - overall layout

iOS



Android



- 1 - Back button (return to previous view)
- 2 - Title/Location/Profile of ToteScan label
- 3 - Parent of this label (optional)
- 4 - Sort by criteria selector
- 5 - Text search

- 6 - List of Items in this ToteScan label (tote)
- 7 - ToteScan label ID/count of items
- 8 - Add Item
- 9 - Edit ToteScan label info/(Clear/Delete tote Android only)
- 10 - Refresh list (iOS only)

# Tote Info View

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## The Basics:

The Tote Info level is the view you will see when either tapping on a Tote from the My Totes top level, or scanning a ToteScan label. You will information about the ToteScan label (tote) at the top of the screen, such as title, location, profile, item count, etc. The list of items associated with this tote will appear in the list below the tote info section. You can change the sort order of the items by tapping on the sort by criteria shown.

By pulling down on the list of items and then letting go, it will initiate a refresh of the data (you might need to do this if you are actively sharing your ToteScan account with someone who might be modifying the same data).

You can initiate a search by Tapping on the text entry box where you see the magnifying glass icon. The search happens live as you type characters. It will do a text search of the items you have in this ToteScan label (tote). To clear your search, tap the cancel or X.

You can optionally assign a parent of this label. This is useful when you have a larger container that has a ToteScan label assigned, and you have smaller containers you place in this larger container that have themselves items. The larger container would be the parent label. For a child tote, you would tap the “set parent” button to scan the label of the parent Tote. You can also “un-set” the parent once set by tapping “un-set”.

To move items from one this tote to another, simply tap/hold/drag to the right on any item in the list. You will see a move option. Once chosen, the camera will activate. Point the camera at the destination ToteScan label.

To delete items permanently, tap/hold/drag to the left. This will present a delete option. Once selected, that item will be deleted. *This cannot be undone.*

Tapping on any item will bring up the Item Detail view.

There is no limit to the number of items you can place in a ToteScan label (tote).

# Tote Info view

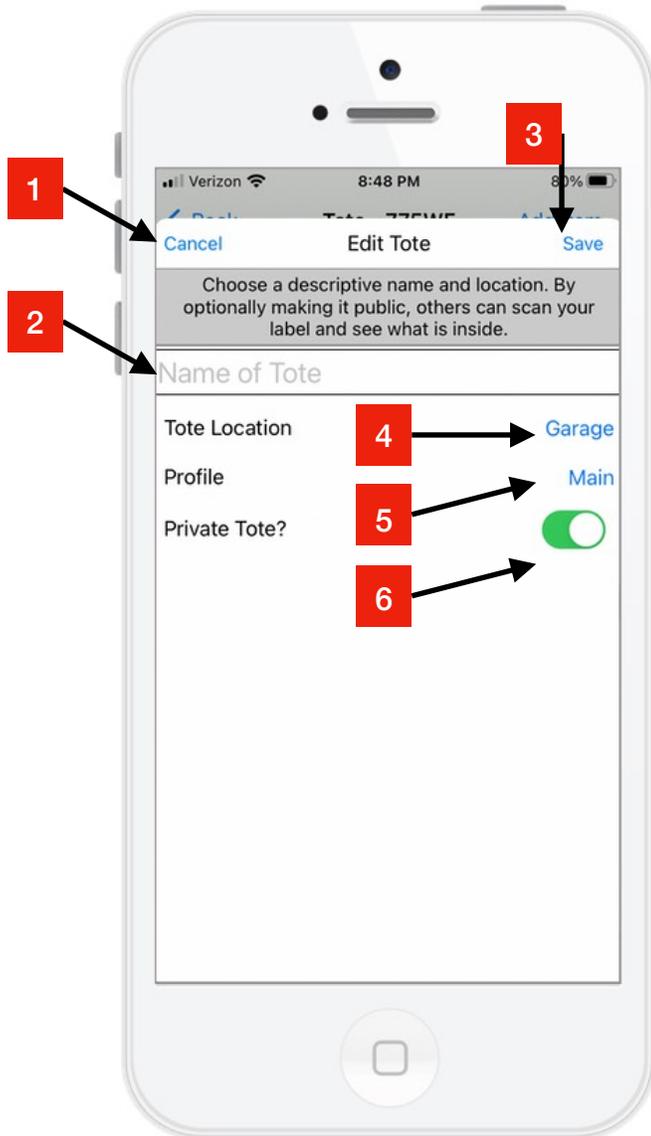
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## Overall Layout Definitions:

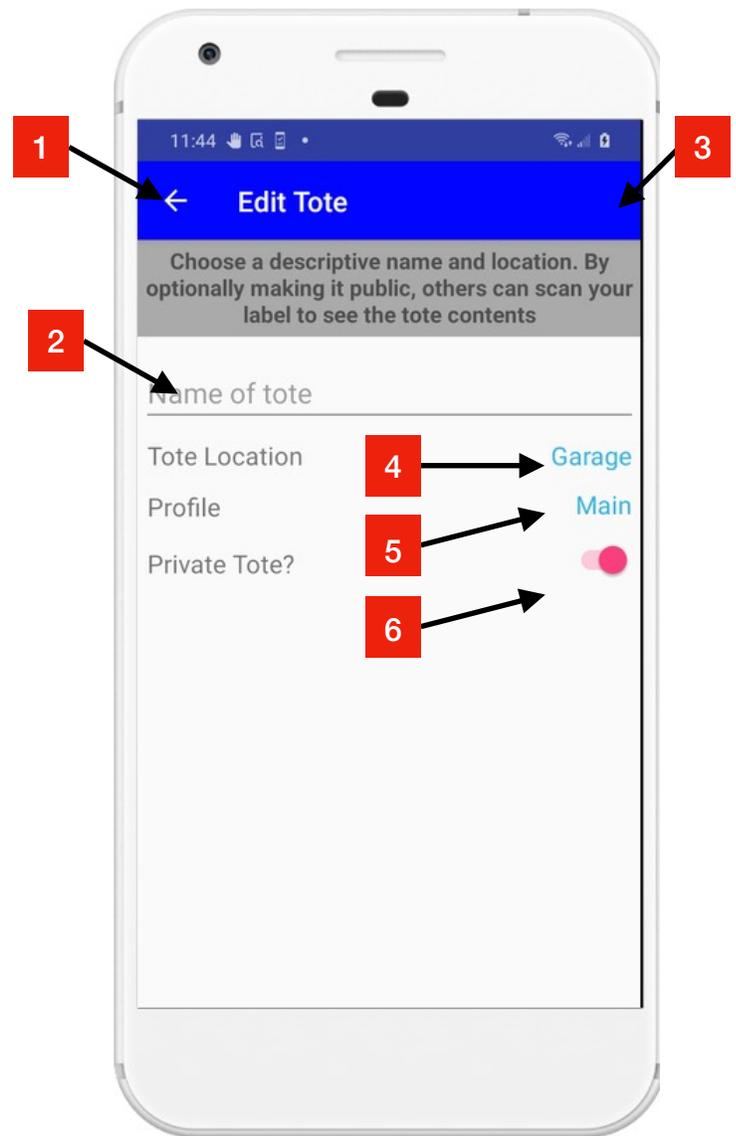
- 1 - Back button:** Tapping this will return you to the previous screen.
- 2 - Title/Location/Profile:** Title of this label, the location of the container represented by this label, and the account profile will appear here.
- 3 - Parent label:** ToteScan labels can be nested one level deep. Larger containers might have additional smaller containers with their own ToteScan labels and items. Parent totes can be assigned in this case.
- 4 - Sort-by criteria:** You can sort the list of items by Title, Description, Quantity, or Date added. This can be sorted in ascending or descending mode (a thru z or z thru a).
- 5 - Text search:** Type in your keyword(s) that you want to search for in your items within this ToteScan label (tote). As you type, search is performed live and results shown.
- 6 - List of items:** The list of items added to this ToteScan label (tote) will be shown. A thumbnail (if pictures are associated with a particular item), along with the title will be displayed. Tap on an item to see its detail view.
- 7 - ToteScan label ID/Count:** The 5 digit alphanumeric code (the one that appears at the bottom of the ToteScan label) appears here, along with the total item count within this tote.
- 8 - Add Item:** To add additional items to this tote, tap Add Item.
- 9 - Edit Label Info/Clear/Delete:** On iOS you can tap the Edit button to edit the ToteScan label info. On Android, tap the 3 dots, and choose to either Edit, or clear/delete this ToteScan label and its contents.
- 10 - Refresh list:** On iOS only, you can tap the refresh button to manually refresh the list of items. *\*Items are automatically refreshed each time you open the Tote Info screen.*

# Edit Tote view - overall layout

## iOS



## Android



1 - Back button/Cancel, return to previous screen

2 - Title of ToteScan label (tote)

3 - Save changes

4 - Location

5 - Account Profile

6 - Privacy setting (private by default)

# Edit Tote view

---

## The Basics:

The Edit Tote view is shown when you've tapped on Edit on the Tote Info view. On this screen you can define the Title of the ToteScan label (tote). This is the "container" which is typically a tote, bin, box, etc. that holds individual items.

You specify the Title of the tote, along with its Location and Account Profile. The Location can be chosen from a number of built-in common locations. If you have a location not listed, you can always add your own Locations through Settings.

The Account Profile is discussed later in this document under the Settings screen discussion, but can be set by tapping on the default "Main" profile. All ToteScan accounts have a Main profile set by default.

The Privacy flag can be set on this ToteScan label as well. All ToteScan labels are private by default, meaning that only the Account Holder can scan and view/edit/add/delete labels and items. If you want others that are not using your Account Holder email to view the labels and items, unset this switch. By setting to non-private, anyone outside of your account can scan the ToteScan label for a *read-only* view of the data.

# Edit Tote view

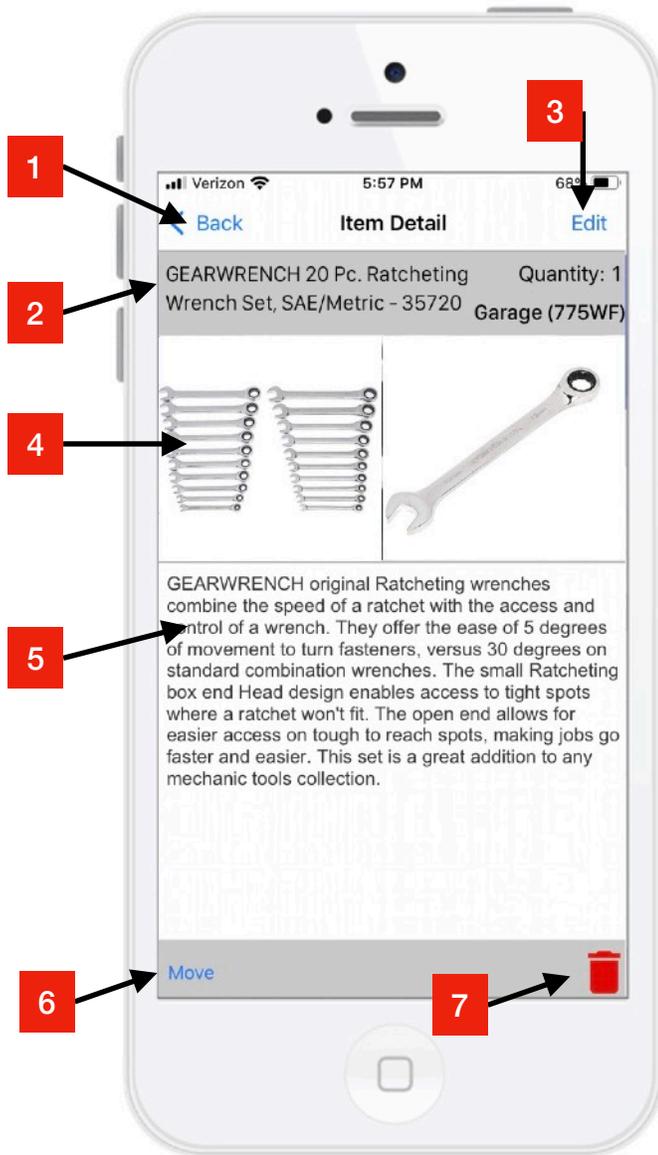
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## Overall Layout Definitions:

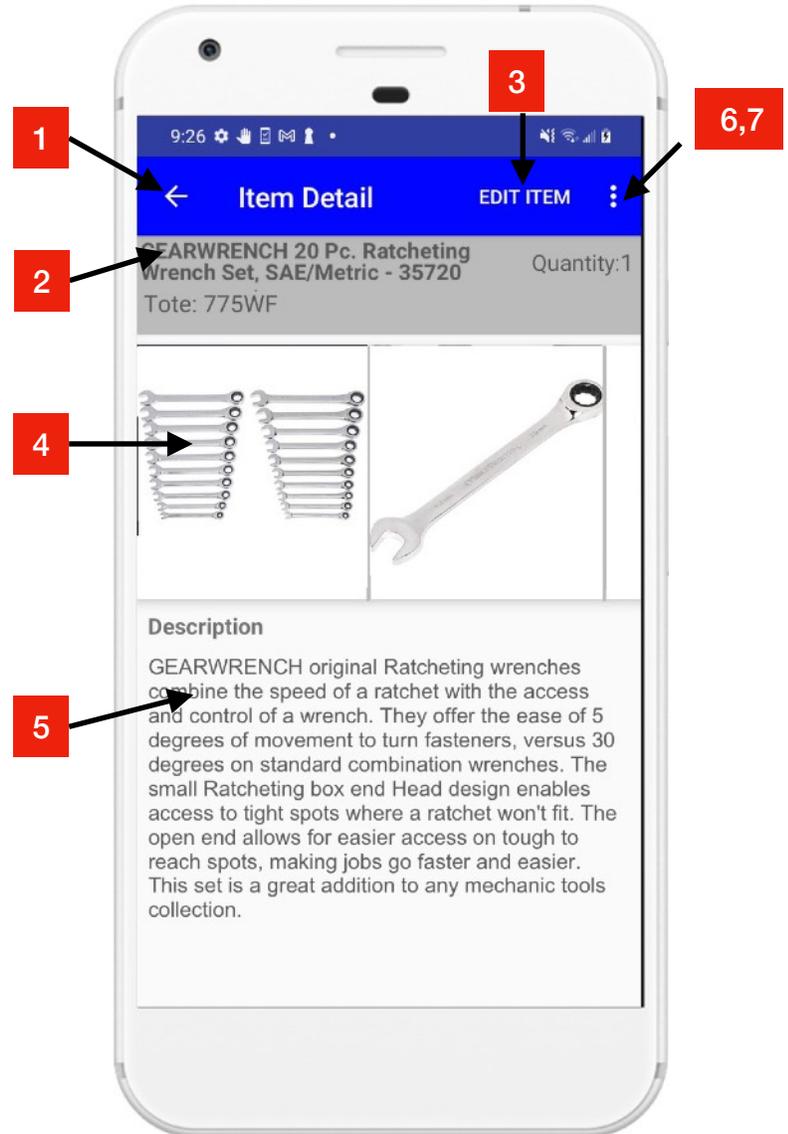
- 1 - Back button/Cancel:** Tapping this will return you to the previous screen.
- 2 - Title:** The Title of this ToteScan label can be set/edited here.
- 3 - Save:** Once you've made changes you can tap Save to save those. On Android, once you start to change the data on the screen, the Save button will appear.
- 4 - Location:** The Location of the tote can be specified here.
- 5 - Account Profile:** The account profile that you want this ToteScan label to appear in can be specified here. You can find more about Account Profiles in the Settings section of this User Guide.
- 6 - Privacy:** All ToteScan labels are private by default. Meaning only the account holder can scan/view/add/edit/delete. Non-private would mean anyone can scan this label and view its contents in a read-only manner.

# Item Info view - overall layout

## iOS



## Android



- 1 - Back button, return to previous screen
- 2 - Item information (title, quantity, tote ID)
- 3 - Edit item
- 4 - Item photos

- 5 - Item Description
- 6 - Move Item ( to another ToteScan label)
- 7 - Delete Item

# Item Info view

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## The Basics:

The Item Info view is shown when you've tapped on an item in the Tote Info screen, or an item you've searched for at the My Totes top level.

Item title, description, quantity, location and the Tote ID, of the ToteScan label (tote) in which it belongs, is shown in the top section of this screen.

You can view any photos you've taken for this item using the horizontally scrolling interface of photos. Tapping a photo brings up a zoomable version of the photo.

You can edit the item, move the item to a different ToteScan label (tote), as well as delete the item from this screen.

# Item Info view

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## Overall Layout Definitions:

1 - **Back button:** Tapping this will return you to the previous screen.

2 - **Item Information:** In the item information section you will find the item title, item quantity, the location of the ToteScan label that this item is located in, as well as the ToteScan label (tote) ID.

3 - **Edit Item:** Tapping this will take you to the Edit Item screen to make changes to this item.

4 - **Item Photos:** If you've taken any photos of this item, those photos will show up here in thumbnail form (scrolls horizontally to see the other photos). Tapping on a photo will bring up a zoomable version.

5 - **Item Description:** This area holds the optional item description. This is a multi-line description area.

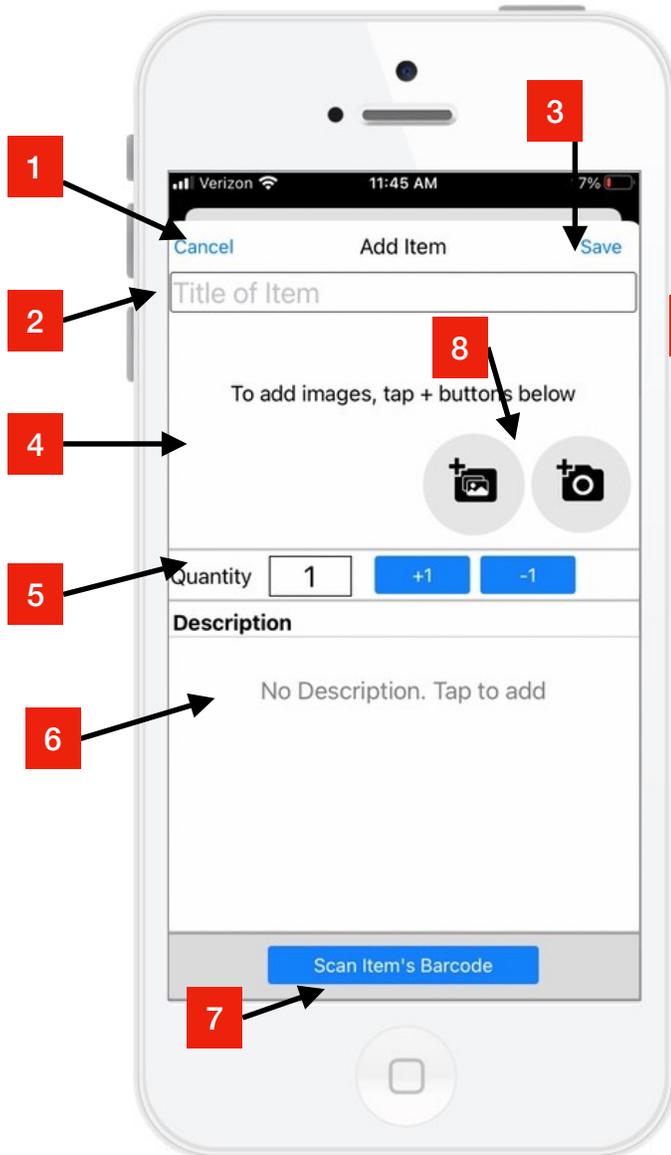
6 - **Move Item:** To transfer or move this item from within this ToteScan label (tote) and put it into another ToteScan label (tote) you initiate this step by tapping Move.

7 - **Delete Item:** To delete this item permanently (this cannot be undone) you would tap the delete button(Android only) or trash icon (iOS only).

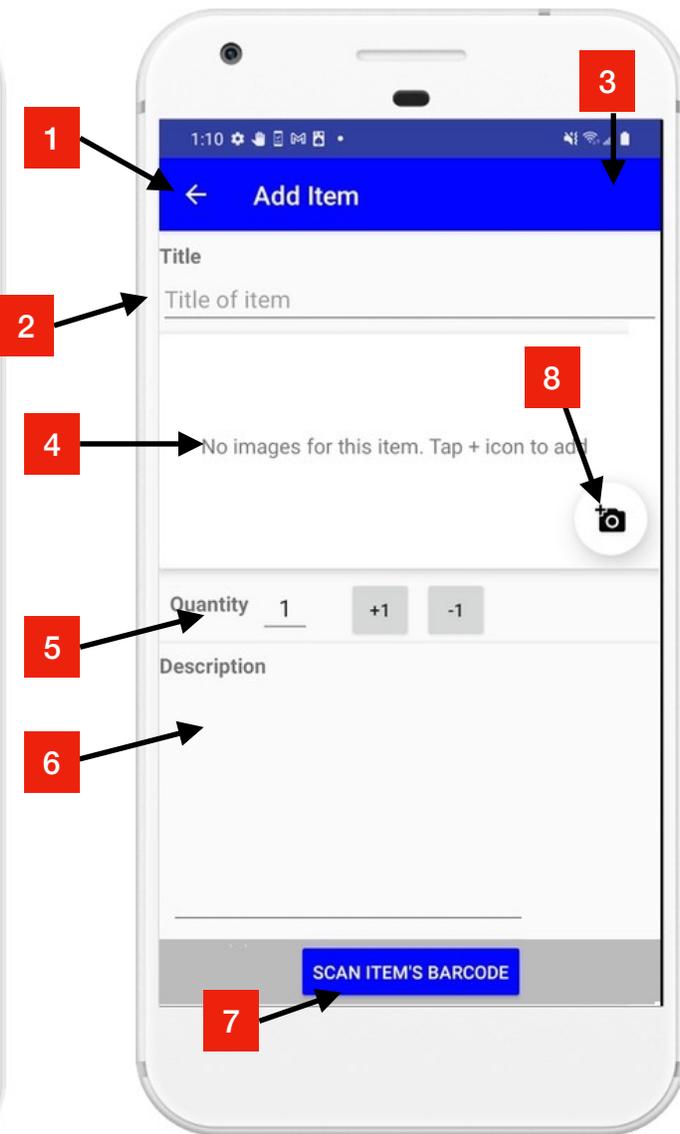
**\* Android only - To open up additional options above, you would tap the triple dot icon in the upper right hand corner.**

# Add/Edit Item Info view - overall layout

## iOS



## Android



1 - Cancel/Back button, return to previous screen

2 - Item title

3 - Save button

4 - Item photos

5 - Quantity

6 - Item Description

7 - Scan UPC code on item (optional)

8 - Add photos (camera/gallery)

## Add/Edit Item Info view

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### The Basics:

The Add/Edit Item Info screen is where you will add item information for new items, or modify existing item information for those items you wish to edit.

For an item you can specify a title, a description, a quantity (defaults to 1), and photos (up to 20 photos can be attached to an item).

To type in a title or a description, simply tap in the text area of those items to popup the keyboard.

To add a photo (or photos), tap the camera+ button or the camera+/gallery+ button depending on your device. Once a photo is added, you can also tap the red X on that photo to delete it.

If the item you are adding has its own product UPC code (barcode), you can tap the “Scan Item’s Barcode” button and point the camera at that barcode. We will search several public/global UPC databases and if we can identify the item, we will pre-load the title and a photo of the that product.

Once you are done adding/editing your data, you can tap Save.

## Add/Edit Item Info view

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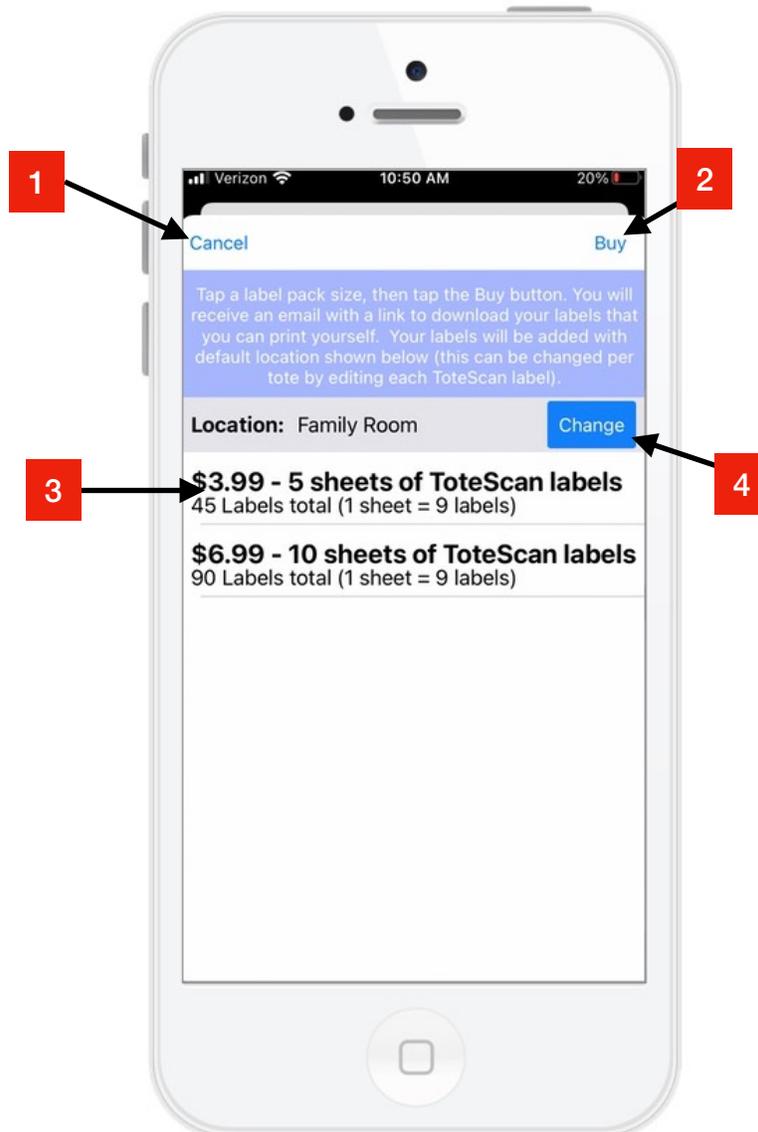
### Overall Layout Definitions:

- 1 - **Back button/Back arrow:** Tapping this will return you to the previous screen.
- 2 - **Item title:** The title of the item
- 3 - **Save button:** Once you've added/edited info, tapping save will save that information.
- 4 - **Item photos:** The photos of this item (up to 20) will appear here horizontally scrollable.
- 5 - **Quantity:** Item quantity (default to 1)
- 6 - **Item Description:** The description of this item
- 7 - **Scan UPC code on item (item's barcode, optional):** If the item you are adding has a UPC (barcode) on it, you can scan that after tapping this button.
- 8 - **Add photos button:** To add more photos to this item, tap the photo button (android) and/or gallery button (iOS).

# Buy Labels - overall layout

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iOS (Android is similar)



1 - Cancel, return to previous screen

2 - Tap to purchase the selected item

3 - Tap which in-app item to purchase

4 - Default location in which newly purchased labels will be located (can be changed at anytime)

# Buy Labels view

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## The Basics:

ToteScan works by scanning official ToteScan labels. You can purchase labels either in retail form (Peel & Stick sheets ready to use), as well as downloadable labels in PDF form that you print out yourself.

Downloadable labels can be purchased either in-app (iOS or Android billing), or through our website store at: <https://www.totescan.com/shop>  
They are available to download in a variety of sizes and format.

On the Buy Labels view within the app, you can tap on one of the downloadable items to purchase, then tap on the Buy button. The prices and items show to purchase are subject to change and may differ than the example shown in this guide.

The default location of a ToteScan label when you buy retail labels is Garage. You can change that at anytime by editing the ToteScan label within the app. For downloadable labels you purchase through the app, you can specify the default location that those labels are initially set to. Tap on Change to change the default location. Any subsequent downloadable label purchases will be assigned to that default location set on the Buy Labels view.

Once purchased, you will receive an email (within a few minutes) with information on how to download your labels.

If you do not see the email, check your junk/spam folder. Reach out to us at anytime if you have an issue with your order at [support@totescan.com](mailto:support@totescan.com)

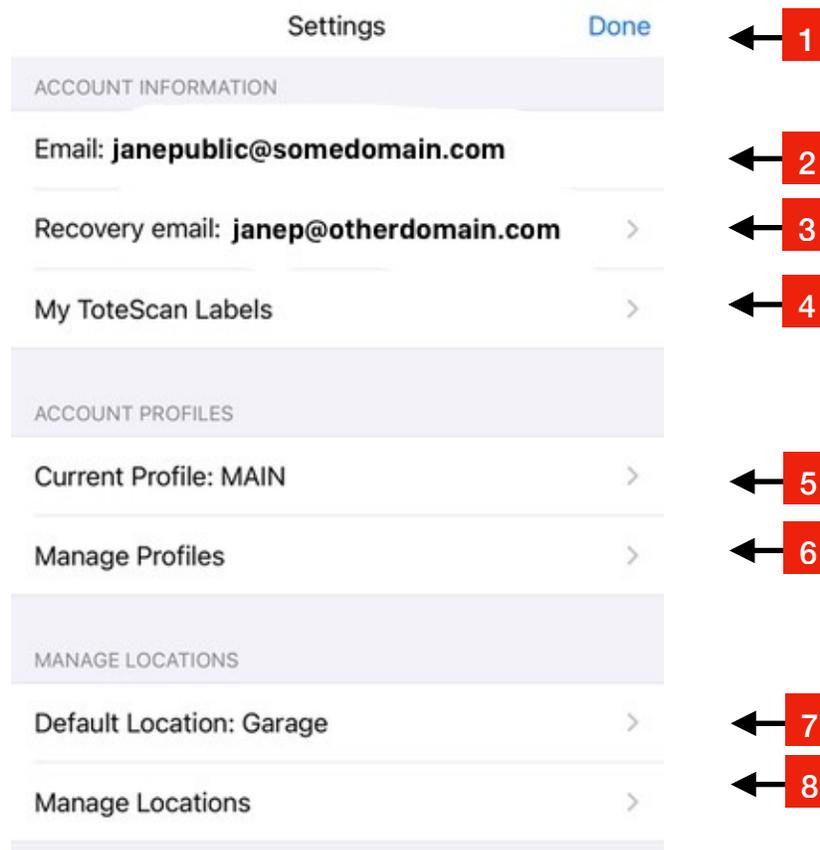
# Buy Labels view

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## Overall Layout Definitions:

- 1 - **Back button/Back arrow:** Tapping this will return you to the previous screen.
- 2 - **Buy button:** Once you've selected an in-app option to purchase, tap the Buy button to purchase.
- 3 - **List of options:** Tap any of the individual purchase options in this list, then tap Buy button to make your purchase.
- 4 - **Default Location:** The default location of any subsequent downloadable ToteScan labels you purchase is defined here. Select the location if you want to change it from the default of Garage. Locations can be added in Settings.

# Settings - overall layout



1 - Done, closes settings

2 - The email address you are signed in with.

3 - Recovery email. Used to verify you if we can't verify using your signed in account email.

4 - Access to view the labels you've purchased through in-app purchase.

5 - Shows your currently active profile. Tap to change.

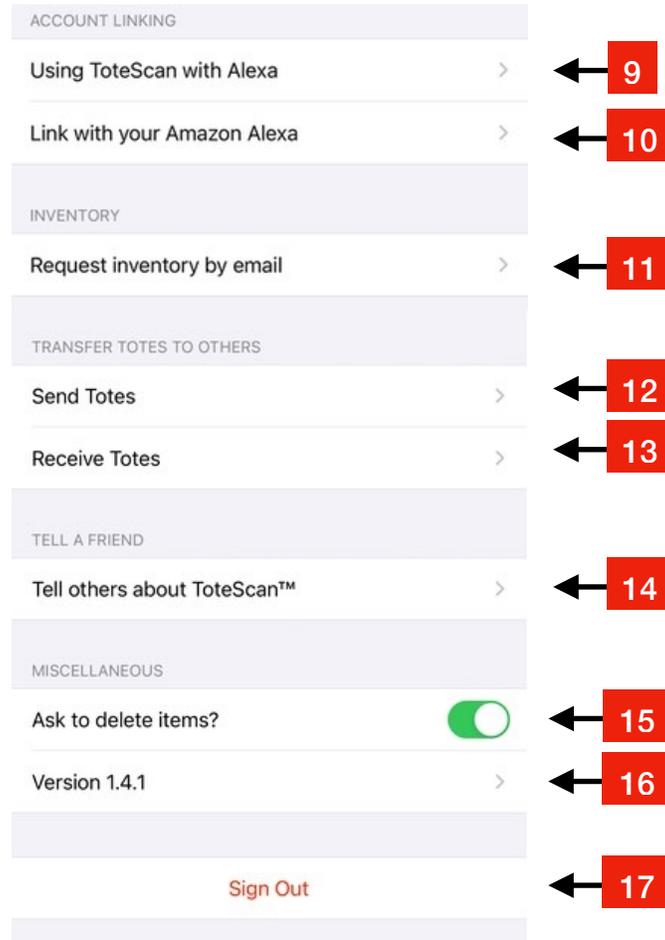
6 - Tap to show your custom profiles, add profiles, delete, etc.

7 - Default location. Used to set the location on newly purchased in-app labels, and newly scanned labels first time.

8 - Add/Delete custom locations.

## Settings - overall layout contd.

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9 - Instructions on using the ToteScan skill for Amazon Alexa.

10 - Link/Unlink your ToteScan account with Alexa.

11 - Request an inventory (PDF/CSV) be sent to your account email.

12 - Send ToteScan labels and their contents from your account to another account.

13 - Receive ToteScan labels from another person's account.

14 - Share ToteScan with others.

15 - Setting that will require you to confirm the deletion of items.

16 - Version number, and About page.

17 - Sign Out of your ToteScan account.

# Settings view

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## The Basics:

The Settings/Account screen provides a selection of options to customize your account, request inventories by email, transfer ToteScan labels to others, and more.

When you first register with ToteScan, we recommend setting a Recovery Email. Simply tap on the Recovery Email line in settings, and you can type in and save a recovery email address. In the event that you lose access for any reason to your original account email, we can use the recovery email address to confirm your ownership of the account.

When you initially scan your brand new ToteScan labels (from retail peel & stick packs), they will be assigned to Garage as their default location. You can change the location that default is set to on first scan of your ToteScan labels by changing the default on the Settings screen. You can choose a built-in location, or make a custom location(s) for yourself and your account.

Inventories of your ToteScan labels and items can be easily requested by tapping on the request inventory line. You can choose either PDF or CSV format. CSV is used for import into spreadsheet apps like Excel.

If you wish to share your account with someone else in your household/business, you would sign into both devices using the same email address. ToteScan labels and their items are contained privately based on the account email. If you are sharing, and want to separate things a bit within your usage, simply setup another or more Profiles. ToteScan labels on first scan will go into the active profile. You can also move any label into any profile you have by editing that ToteScan label in the app.

If you are packing items for someone else (perhaps you are a mover or a professional organizer), you can use your own ToteScan account. Once complete you would initiate a transfer through Settings and your customer would initiate a receive on their device. ToteScan content will then transfer to them.

# Settings view

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## Overall Layout Definitions:

- 1 - Done/Back arrow(Android):** Tapping this will close the Settings view.
- 2 - Account Email:** This shows the currently signed in email used for the ToteScan app.
- 3 - Recovery Email:** When you initially register your ToteScan account with your email address, we have you confirm that with a 4 digit confirmation code. This is your main account email and what securely holds your ToteScan data in our secure and private cloud. There are times though that you may lose your email address access due to moving jobs/locations/etc. Most people are not able to protect against this lack of access to their email address, so we've enabled a recovery email option. This option enables you to tell us about an alternate email address that we could use to verify your account ownership in the event that you lose unexpectedly your own access to your main ToteScan email address. We highly recommend you set up a recovery email address as we will have to verify your information prior to communicating with you about your main email's ToteScan data and access.
- 4 - My ToteScan labels:** When you purchase ToteScan labels in-app through the buy button (choosing to download the labels option), once purchased your PDF file of labels will appear once you tap this line. Each purchase will show up as a separate line-item that you can tap on to view the PDF file of labels (and optionally print from your device to your printer). You will also receive an email with a temporary link to download your PDF file of labels.
- 5 - Current Profile:** This shows your active ToteScan profile. Think of this as a separate collection of ToteScan labels within your account. You can have a profile named Personal and one named Business for example, if you keep some labels in your personal profile to view/edit/scan and some in your business profile for your business specific ToteScan labels and items. Profiles are also commonly used when an account is shared in a household of 2 or more users, each can have their own profile and yet still scan and view items within the other profiles on the same email account. All ToteScan accounts have a default Main profile that you start with.
- 6 - Manage Profiles:** Tapping this line item will take you to a screen to view any custom

# Settings view

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## Overall Layout Definitions (contd.):

**7 - Default Location:** The default location of a ToteScan label is Garage. This is one of many built-in ToteScan location names. You can set the Default location to a different built-in location or to one of your own created custom location names. When you scan newly purchased retail peel & stick ToteScan labels for the first time, they will be set to the location you've specified here as your default. Location can be changed at anytime though for any ToteScan label. Just go to that label (either scan it or search/select it on the My Totes screen) and edit it to change its location. Default location is also used when you purchase in-app downloadable labels. Those labels will be assigned at the time of purchase to this default.

**8 - Manage Locations:** You can create your own location names by tapping on this line item. Locations can be added and deleted from this screen. To delete a location you tap/hold and drag to the left to reveal the delete option. You can't modify the name of a location once created. ToteScan has a number of built-in locations that you can choose from when setting up your ToteScan labels. And of course, ToteScan labels are editable and re-usable, so you can always edit them to change locations if you move your totes/boxes/containers/etc. From the drop-down list of locations, your own custom locations that you create through this Manage Locations option will always appear at the top of the list. The built-in locations cannot be deleted, but do appear after your custom locations in the list.

**9 - ToteScan with Alexa:** If you have an Alexa enabled device, you can install the ToteScan skill for Alexa. The ToteScan skill makes it easy to search and find things hands-free. There are specific instructions and invocations needed for the ToteScan skill to work properly. See the additional Alexa setup instructions later in this document.

**10 - Link/Unlink Alexa:** Tapping this will take you to the steps to link your ToteScan account with the ToteScan Alexa skill. See the additional Alexa setup instructions later in this document.

**11 - Request Inventory:** At anytime you can request an inventory of your ToteScan labels and items be sent to you by email. The request can be for a PDF formatted file, or a CSV formatted file. CSV is used for importing into spreadsheet programs like Excel.

# Settings view

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## Overall Layout Definitions (contd.):

**12 - Send Totes:** This option will enable you to transfer ToteScan labels and their items out of your account and into another different account. When transferring out, it is done at the profile level (so any ToteScan labels that are in a profile in your account) and all totes/items will be transferred out of this profile and into the destination (which is initiated by the other person with the other account choosing the Receive Totes option). More information about this is later in this document.

**13 - Receive Totes:** This is the other side of the Send Totes operation. The other person in their account chooses to send Totes (ToteScan labels and their items) from their device, and on your device you choose the Receive Totes option. Follow the on-screen instructions on both devices to move those totes. More information about sending/receiving totes is later on in this document with real-world typical usages of this feature.

**14 - Tell Others:** Choose this option to share ToteScan with others using a variety of methods displayed.

**15 - Delete Confirmation:** This option enables you to set the requirement for deleting items (which is a permanent operation and cannot be undone when initiated/completed). There is no delete confirmation turned on by default. Which means if you swipe left on items on your screen you will delete them right away without a confirmation. If you do deletions a lot in your daily operation of ToteScan and don't want the slow-down step of a confirmation, leave this option disabled. But, if you want to protect that swipe so you don't mistakenly delete items by swiping left, turn this option on to get that validation confirmation prior to deletion.

**16 - Version/About:** The version number of the ToteScan app appears here. If you reach out to support at [support@totescan.com](mailto:support@totescan.com) you might be asked for your support number which appears on the About page after tapping on this line item.

**17 - Sign Out:** To sign out from your ToteScan account tap this button. You will be returned to the sign-in screen again.

## Settings view - detailed descriptions

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### **Send/Receive Totes (*For Movers and Professional Organizers*)**

All ToteScan labels/items reside privately and securely within your account that you registered initially with your email address. There are times though where transferring ToteScan labels/items to other accounts can be beneficial. Typically ToteScan sending/receiving totes is used by moving companies or personal organizers. The process would typically be that the movers/organizers would use their own registered email account with ToteScan to scan and pack the customer's items. At the end of the job, they would then initiate a Send Totes operation from their account, and have the customer on their own account initiate a Receive Totes operation. Contents would then be transferred completely out of the sender's account and into the receiver's account.

The process for this would typically be as follows... the mover/organizer would go into Settings and initially create a new Profile with the name of the customer/customer account number/etc. They would then choose to make this their current profile. Then they would scan ToteScan labels they will use for this job, and itemize their customer's totes/boxes/containers. Then once the job is completed, they would have the customer download and install for free the ToteScan app. Customer would then register their account with their own personal email address. Then, the customer would go to the Settings screen, and choose to Receive Totes. The customer then chooses a profile to receive them into (typically this is just the default Main profile). The mover/organizer then goes to Send Totes option, chooses the profile of the customer they set up prior that was used to input all the customer's data. A QR code is then shown on the mover's/organizer's screen, to which their customer will point their phone's camera to. This will then initiate the transfer of all data to the customer's account. The original data will no longer appear in the mover's/organizer's account.

The customer will then own the labels/items they have been transferred and will be privately and securely held in their own account going forward.

## Settings view - detailed descriptions contd.

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### Setting Up ToteScan with Alexa enabled devices:

As an option, if you have an Amazon Alexa enabled device (such as an Echo), you can install the ToteScan skill for Alexa on your Alexa device for free. With this ToteScan skill, you can perform simple hands-free searches of your Totes (ToteScan labels) and items.

While the ToteScan skill is powerful and easy to use, it does have specific requirements to setup and use which we will cover here.

#### Setup:

1. You will first install the ToteScan skill for Alexa using the Alexa app on your device or through your Amazon account online. Familiarize yourself with the Alexa app and its installation by reviewing the app on your device's App store (if you don't already have it installed.) Amazon has extensive documentation and help to get that up and running.

2. Once the ToteScan skill is installed, go to your ToteScan mobile app, Settings, and tap on "Link with your Amazon Alexa". You will see an intro screen describing how to link your account with the ToteScan for Alexa skill. Now, make sure you are near your Alexa device, and then say "Alexa open ToteScan".

3. You will hear an introduction from the Alexa device stating you need to link your account with ToteScan. Once she is done speaking, say "Link account with" and the code listed on your ToteScan mobile app screen. Say each letter/number clearly and distinctly. You have 60 seconds to complete this process until your letter/number combination expires (for security concerns). If you miss the opportunity, then just go back and try again in the app.

## Settings view - detailed descriptions contd.

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### Setting Up ToteScan with Alexa enabled devices contd. :

4. You will hear the ToteScan for Alexa skill tell you the account is now linked if you are successful. Once setup, you can now use the ToteScan skill :)

#### Usage:

You interact in a specific way with the ToteScan Alexa skill. You use what Amazon calls "utterances". These are specific phrases for which the ToteScan skill can respond.

You open the ToteScan skill by saying to Alexa.... "Alexa.....open ToteScan"  
When the skill is opened, you can ask any of the phrases shown below. It works specifically and only with the following phrases, so make sure you use them as shown.

#### Tote (ToteScan label) Specific

- **“where are totes named XXXX”** (where XXXX is the title or portion of the title of the tote)
- **“where's tote named XXXX”** (where XXXX is the title or portion of the title of the tote)
- **“where is tote named XXXX”** (where XXXX is the title or portion of the title of the tote)
- **“find totes named XXXX”** (where XXXX is the title or portion of the title of the tote)
- **“search for totes named XXXX”** (where XXXX is the title or portion of the title of the tote)
- **“identify tote XXXX”** (where XXXX is the code that is on the ToteScan label)
- **“identify XXXX”** (where XXXX is the code that is on the ToteScan label)

## Settings view - detailed descriptions contd.

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### Setting Up ToteScan with Alexa enabled devices contd. :

#### Item Specific

- **“where's XXXX”** (where XXXX is the title or portion of the title of the item)
- **“where is XXXX”** (where XXXX is the title or portion of the title of the item)
- **“search for XXXX”** (where XXXX is the title or portion of the title of the item)
- **“find XXXX”** (where XXXX is the title or portion of the title of the item)
- **“find item named XXXX”** (where XXXX is the title or portion of the title of the item)

So when she, the Alexa ToteScan skill, asks "what can I help you find?", you have to say one of the above phrases, and then the word or words after that.

For example, "where are totes named camping"

If you have any questions about using the ToteScan skill for Alexa, contact us at [support@totescan.com](mailto:support@totescan.com)

## TIPS/FAQ:

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**Q: *How do I move items from one tote (ToteScan label) to another?***

**A:** Go to the Tote (ToteScan label) that has the item you want to move. Either scan the label or find it in the My Totes screen of the mobile app to open the Tote Info screen. Find the item to move on that list, then tap/hold/drag to the right on that item to open the “move” option. Either tap the Move button or fully pull all the way to the right to initiate. The camera will be activated. Point the camera at the destination ToteScan label into which you want to move the item.

**Q: *If I lose my phone will I lose my ToteScan data?***

**A:** No. Your data is stored in our secure cloud (USA based always) and securely tied to your email address you registered with. If you lose your phone or get a new phone, simply log-in with the email you used originally. All your data will show up.

**Q: *If I buy more ToteScan labels will they be different than the ones I already have?***

**A:** Yes. All ToteScan labels are globally unique. No two labels are the same. All labels are different, and once scanned under your ToteScan account, will be tied securely and privately to your ToteScan account.

**Q: *How do I share my account with family members?***

**A:** Simply log into their device using the same email address you used to register your own ToteScan account. Both of you (or any number of others you sign into your account) can access your data (add/edit/delete etc).

**Q: *When I scan my labels the first time, they always show up in Garage. Can I change this?***

**A:** Yes. Go into Settings, and choose the Default location option. You can set the location that will be used for any brand new scanned ToteScan labels, as well as in-app labels you might purchase in the app. The location can also be changed at anytime by going into a tote (either scanning it or tapping it from the My Totes screen), and editing it.

## TIPS/FAQ continued:

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**Q: *Can I add my own locations for the ToteScan labels?***

**A:** Yes. Go into Settings, and choose the Manage Locations item. Any locations you add will appear at the top of the list of locations when editing Totes (ToteScan labels).

**Q: *I have an iPhone and my family members have Android devices. Can we share an account on ToteScan?***

**A:** Absolutely. ToteScan works the same on either Android or iOS devices. You can share an account with someone else or any number of others, regardless of their supported device type. You just need to use the same email address when registering those other devices.

**Q: *When I'm adding an item in ToteScan and I choose to scan its barcode (UPC) it sometimes doesn't show up or it shows a different item. What's going on?***

**A:** While we do our best to give you access to as many items in the world as possible to scan, sometimes a company will re-use a UPC owned by another company so the product will appear differently. At times we don't have the data available for that particular UPC barcode. For those you will just have to manually enter the data.

# Conclusion

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This guide should give you a good understanding of how to get up and running quickly with your new ToteScan labels, and how to do more advanced features as you need them. We are so excited to be part of your organizing journey!

You can of course reach out to us at anytime, we are here for you. Email us at [support@totescan.com](mailto:support@totescan.com) and we typically respond within minutes.

