TOOLBANK USER MANUAL

How to be a ToolBanker

This manual contains information on how to apply for ToolBank membership, manage your ToolBank account, and submit your ToolBank orders.

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Membership Status Communication & ToolBank Account Setup

Congratulations! Your application for membership at the ToolBank has been approved!

The Organization Executive and Primary Contact (if provided) will receive two emails.

The first is a welcome email like the one on the right.

Congratulations! Your application for membership at the ToolBank has been approved. The information below will help you get the most out of your membership. Please share this information with any staff who will be borrowing from the ToolBank

Here are a few guick tips on how to maximize your ToolBank membership

Know the Rules: In your application, you agreed to abide by the ToolBank Membership Agreement and Service Policy. We rely on our member agencies to respect the rules of tool lending and to be accountable. Please read both attached documents carefully, and share them with your staff. Following the rules of tool lending will keep your costs as low as possible

Add Users: You may log in to add additional users to your ToolBank account. This feature empowers your staff to borrow ToolBank tools on behalf of your agency with 100% accountability.

Take a Tour: You are invited to tour the ToolBank, meet the staff, and learn how the ToolBank can best serve your agency. Please call () - to se up an appointment for a tour today.

We look forward to helping your organization achieve its most ambitious goals. See you at the ToolBank!

You have been invited to use the ToolBank on behalf of .

Please follow the steps below to create your password and login.

- 1. Follow this link to go to the log in page https://toolbank.my.site.com/agency/s
- 2. Click the 'Forgot Password' link under the 'Login' button. 3. Enter your username -@toolbank.org
- 4. Click the 'Reset Password' button
- 5. Look for a reset password email and click the link provided

6. You will be navigated to a screen to set your password and login.

For all future logins, use this link, username and your created password to login to the ToolBank.

Login Link: https://toolbank.my.site.com/agency/s Username: @toolbank.org

We look forward to serving you.

The second email will provide instructions that allows each user to set up their login credentials in TOM.

The email will provide instructions to set up your password through Reset Password procedures.

Username will be your email address followed by a ".tb". Example primary@companyname.com.tb

Save the link, your username and password for future logins.

Until you receive this email and create a password, you will be unable to access your ToolBank account and order tools from us. If you do not receive this email, please contact the ToolBank.

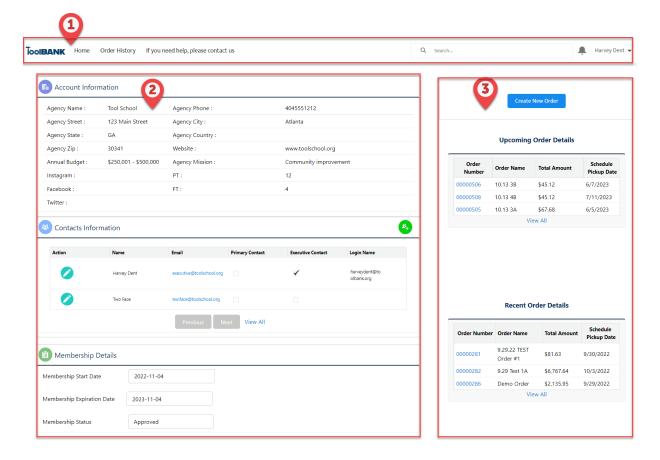
Accessing Your ToolBank Account

- You can access the login portal through your ToolBank affiliate's website. Go to "Tool Lending" at the top of the page and select "Member Agency Portal" from the drop-down menu.
- Click on the "Order Tools" button.
- Enter your username and password and click "Log in".



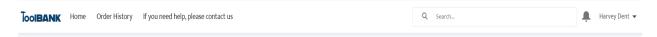
 You can also bookmark this URL to access directly: https://toolbank.my.site.com/agency/s/login

ToolBank Home Screen



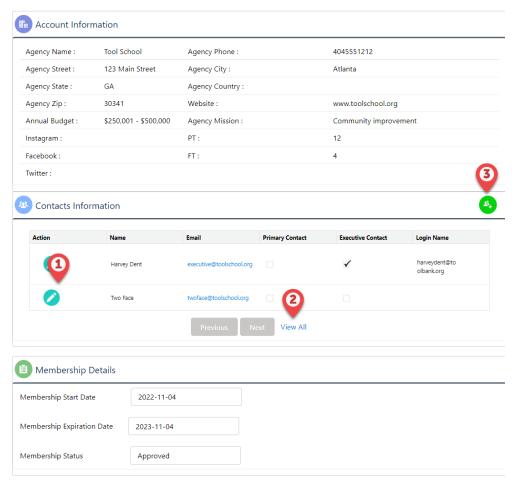
The "Home" Screen is divided in to 3 main sections that will provide an overview of your Organization and Orders as well as a navigation point to almost all features available to you. These sections include the Navigation Bar, Your Information and Order Information.

Navigation Bar



- Home: Click the "Home" to return to this screen at any time.
- Orders (Order History): Will allow you to view lists of Orders in any status and click into that order for the most up to date information.
- If you need help, please contact us: Contact details and hours for your associated ToolBank Affiliate will be listed here.
- **Search:** Searching for an Order, enter the full or partial Order Name or Number here. Click enter to see matching results and select the one you are looking to see.

Your Information



- Account Information: Displays demographic information about your Account
- Contacts Information: Displays all the people on your Account that can interact with the ToolBank ordering process.

Contact Actions:

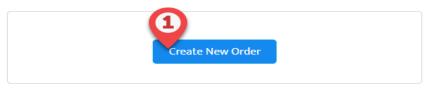
- 1. Clicking the pencil allows you to edit the specific contact record.
 - o To edit an email address, please contact the ToolBank directly.
 - If you would like to name a new primary or executive contact,
 you must first remove the checkbox from the current contact.
 - NOTE: The Contact marked primary will receive all emails sent about Orders and Membership.
- 2. To save space only a few contacts will display. If you do not see the person you are looking for, click the "View All" link.
- 3. Need to add a contact, click the green button in the upper right of the

Contact Information section.

NOTE: It may take 1 or 2 days for a new Contact to be provided with a login to this system.

• **Membership Details:** Reminder of your Start, Expiration Dates with ToolBank.

Order Information



Upcoming Order Details

Order Number	Order Name	Total Amount	Schedule Pickup Date	
00000506	10.13 3B	\$45.12	6/7/2023	
00000508	10.13 4B	\$45.12	7/11/2023	
00000505	10.13 3A	\$67.68	6/5/2023	
View All				

Recent Order Details

Order Number	Order Name	Total Amount	Schedule Pickup Date
00000281	9.29.22 TEST Order #1	\$81.63	9/30/2022
00000282	9.29 Test 1A	\$6,767.64	10/3/2022
00000286	Demo Order	\$2,135.95	9/29/2022
	View	All	

Order Actions:

- 1. Clicking "Create New Order" will take you through 3 screens to place your next Tool order.
- **Upcoming Order Details** Displays your next 5 Orders by Scheduled Pickup Date. To see more, click the "View All" link or click "Orders" in the top navigation bar.
- **Recent Order Details**—Displays the 5 most Recent Orders viewed by you. To see more, click the "View All" link or click "Orders" in the top navigation bar.

How to Create Tool Orders

On your home page, click the "Create Tool Order" button in the top right corner of the screen to begin.



Submitting an order will include three steps. The icons on the top of the screen will let you know which step you are on. You cannot use the icons to navigate. If you started and order on accident, close the browse tab to exit the order.

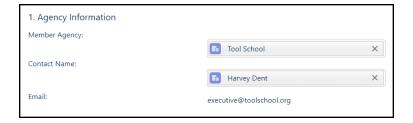


Step 1: Order Information

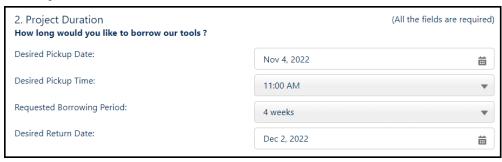
This screen will have 6 sections to populate before continuing to the next step.

1: Agency Information

Prefills your Name, Email and Member Agency names.



2: Project Duration



- All fields in this section are required
- Enter a desired pickup date and time, and the number of weeks you'd like to borrow the tools. You will be charged a small handling fee based on the number of weeks you select.
- The desired return date will calculate for you based on the first 3 values provided. If this is not the correct date of your return, you can change it to your preferred date.
- NOTE: we are NOT able to guarantee your desired pickup and return date/time. After submitting your tool order, a ToolBank Staff member will contact you to confirm your order and dates.

3: Project Information

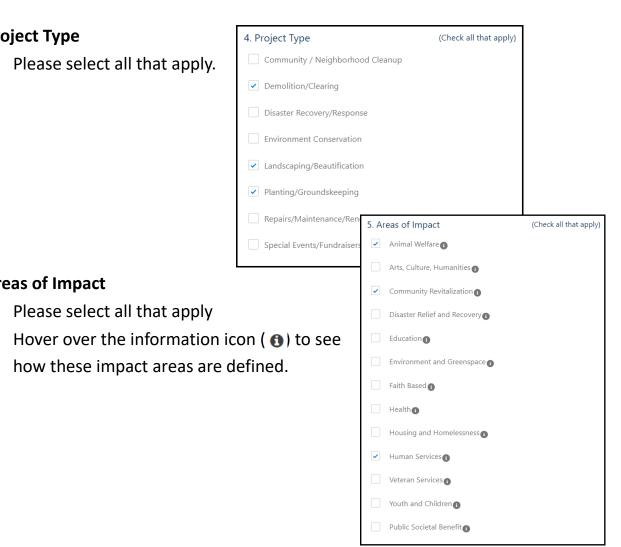


- All fields in this section are required
- If your project will take place in more than one ZIP code, please separate ZIP codes with a comma.
- NOTE: Hover over the information icons for an explanation of these fields.

4: Project Type

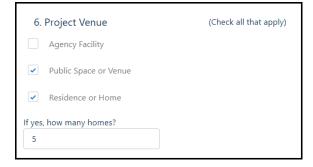
5: Areas of Impact

• Please select all that apply.



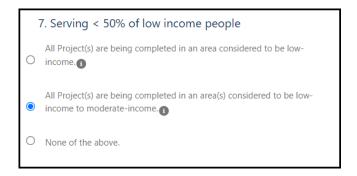
6: Project Venue

- Please select all that apply
- Selecting 'Residence or Home' will require additional details.



7: Serving

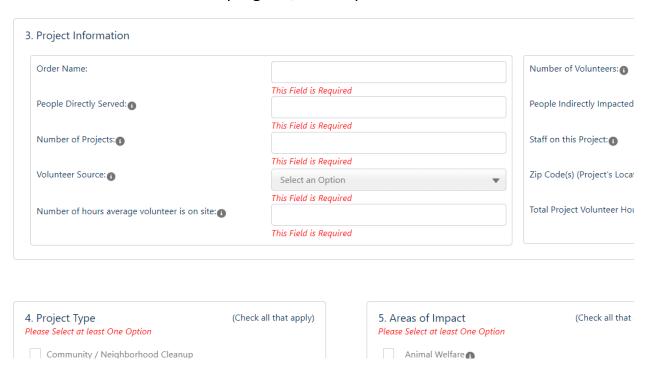
 Please help us understand how our tools are being used in the community by selecting one of these options.



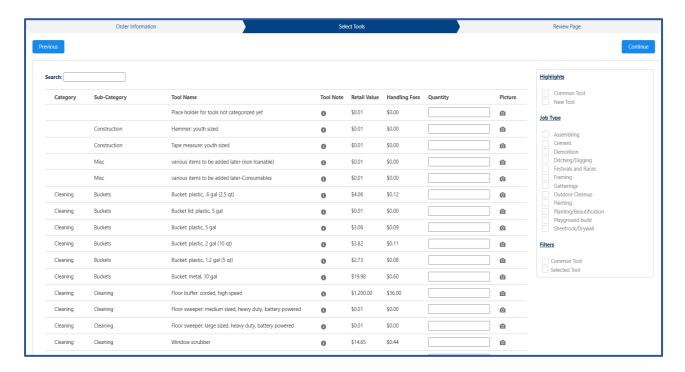
• When you are finished, click the "Continue". Button is found at the top and bottom of the screen.



• If the screen does not progress, scroll up to confirm there are no errors.



Step 2: Select Tools



- To add a tool to your order, simply type the quantity desired in the **Quantity** column
- The remaining columns provide detailed information about the tool to help you make your selections.
- Category & Sub-Category Classifications of the tools and their main use
- Tool Name The name is often includes a brief description of the tools attributes
- Tool Note Some tools may require additional materials or tools to use them properly. If that is the case, when you hover over the (1) in this column, you will see these suggestions.
- **Retail Value** This is the average price it would cost to purchase this tool at a store and to replace the tool if it is lost or damaged beyond repair.
- Handling Fees This is 3% of the retail value of the tool. This fee is applied
 to each tool for each week it is borrowed.
- Quantity Enter number of this tool you would like to include in the order.
- Picture Hover over the camera (a) will display a picture of the tool.

Finding the Right Tools

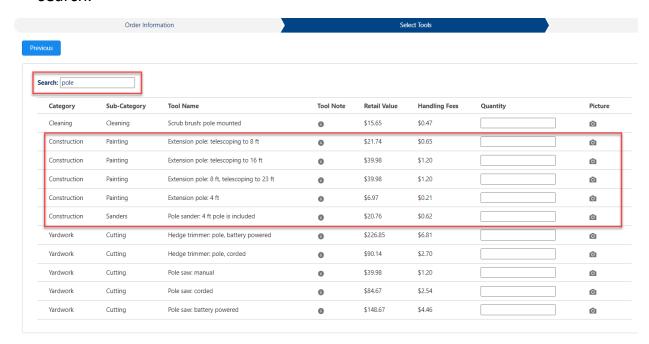
This page offers Search, Highligh and Filter capabilities to help you find the right tools for your project.

Search

 In this order, 'Window Scrubbers' were added and the Tool Note advised that Pole Extensions also need to be added.



- To quickly find the Pole Extensions, use the Search at the top left of the screen.
- Enter the whole or part of the tool name, category or sub-category and hit 'Enter' on your keyboard. The list of tools will adjust to match your search.



 Delete your search criteria and click 'Enter' on your keyboard again to return to the full inventory of tools available.

Highlights

- Selecting 1 or more boxes under the 'Highlights' or 'Job Type' headers on the left side panel will allow you to still see the full inventory while also visibly *highlighting* the tools in these categories.
- Each selection will highlight in a different color, if a tool falls under more than one highlight it will display as the first one selected.

NOTE: Since the full list is still displayed, you may have to scroll to find the highlighted tools.

• Common Tool: Tools most often borrowed

New Tool: Tools added to inventory in the past year

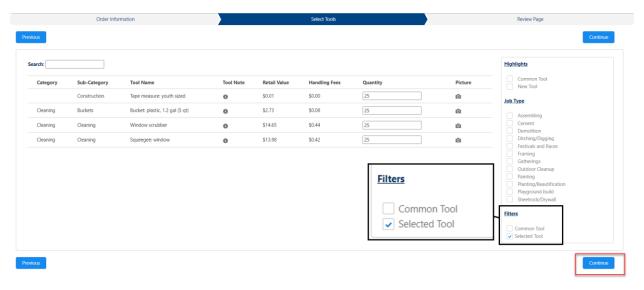
• Job Type: Tools often required to complete work of this type



Common Tools in Purple, Cement in Yellow and Ditching/Digging in Yellow

Filters

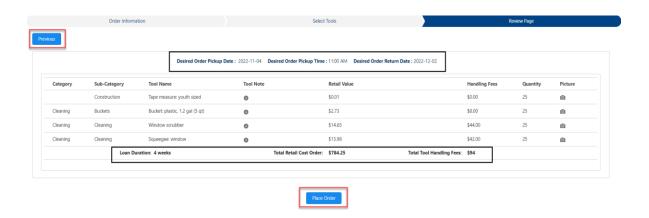
- Unlike Highlights, selecting a Filter will reduce the list of tools to just those that apply to the filter selected.
- When you believe you have added all you need, clicking the 'Selected Tool'
 Filter is an optimal way to review your items and quantities for any final
 adjustments.
- Common Tool: Tools most often borrowed
- Selected Tool: Any tool where a 'Quantity' more than 0 has been added.



• Once you have the correct tools in your order, click 'Continue to proceed to the final step.

Step 3: Review Order

- Review your selected tools and see the estimated handling fees for your order.
 - To add or remove a tool, click the 'Previous' button
 - To change the 'Desired Pickup Date/Time' or 'Desired Order Return Date' click the 'Previous' button on this screen, and again on the 'Select Tool' screen.
- If the order looks great and you are ready to submit, click the "Place Order" button at the bottom center of the screen.



Order Confirmation

- Once the order is properly submitted, you will see this confirmation screen.
- Click the 'Click here' link to view the Order details.

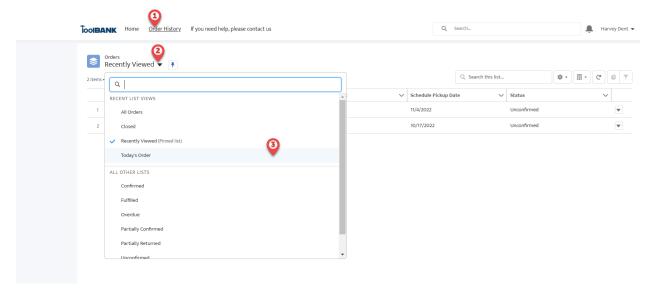
OOIBANK

Your order has been placed. The ToolBank will contact you within 2 days to let you know your order is confirmed. Click here for more details to know about your order Information.

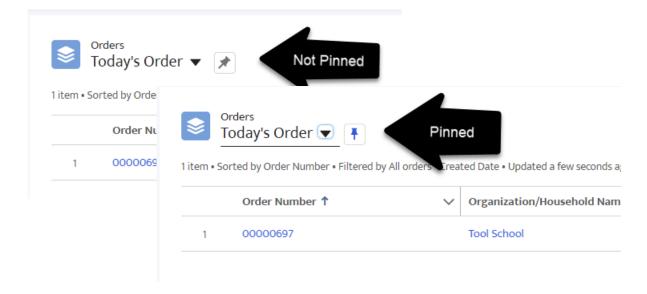
Orders

Order Lists

- Clicking "Orders" on the navigation bar will bring you to a screen where you can view your orders grouped by status or those submitted Today.
- Clicking the 'down arrow' next to the Order icon will show you the filters you can choose.

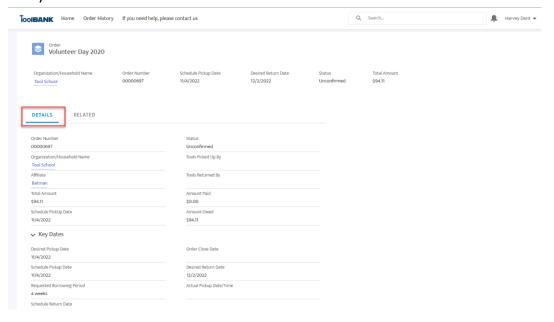


• If there is a list you prefer to see every time you click 'Orders' from the Navigation bar, you can select it then click the 'Pin' icon. To change this selection later, just select another list and the 'Pin' icon again.

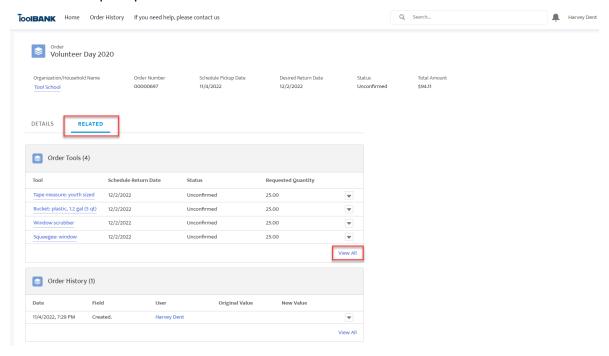


Order Details and Related

- Clicking an 'Order Number' from the list view or clicking 'Click here' on the Order Confirmation page will bring you to Order Details
- **Details:** Will show the information you entered on the first step of your orders as well as summary financial information.



- **Related:** Displays 2 sections, 'Order Tools' and 'Order History'. Click the word 'Related' to view.
 - Order Tools: Will display the Name, Schedule Return Date, Status and Requested Quantity for each tool in your order.
 - **NOTE:** If you do not see a tool you are looking for, click the 'View All' link of the 'Order Tools' section.
 - Order History: Displays actions taken on the order like status changes or updates to pickup and return dates.



ToolBank Information

If you need help, please contact us

- Clicking "If you need help, please contact us" on the navigation bar will bring you to a screen where you can view information about your ToolBank Affiliate.
- Information includes, Phone, Email, Address, Business Hours and special notes.

