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.

Contents

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 quick 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 set up an appointment for a tour today.
>
> We look forward to helping your organization achieve its most ambitious goals. See you at the ToolBank!

> **Subject:** Please activate your ToolBank user account
>
> You have been invited to use the ToolBank on behalf of ToolBank.
>
> 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 - new.user@toolbank.org.tb
> 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: new.user@toolbank.org.tb
>
> 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.

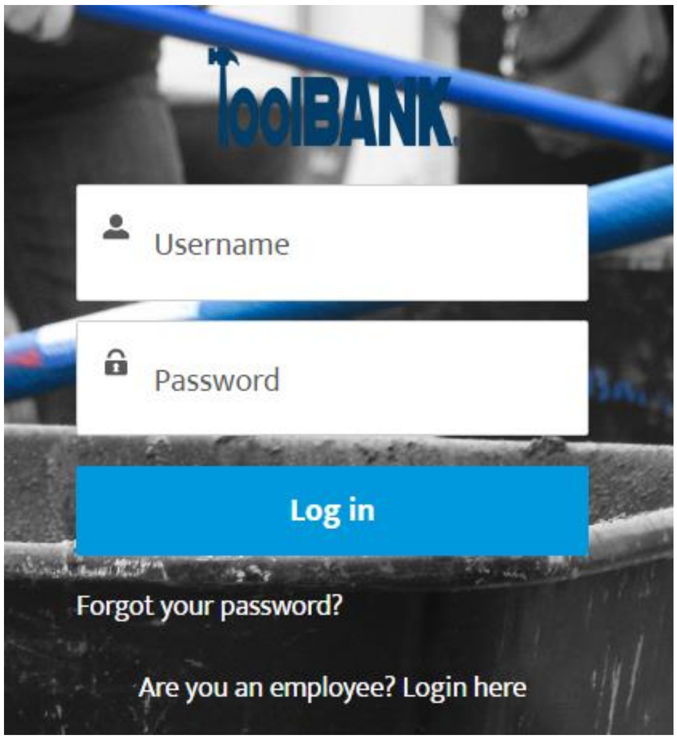
Username will be your email address followed by a ".tb". Example: new.user@toolbank.com.tb

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

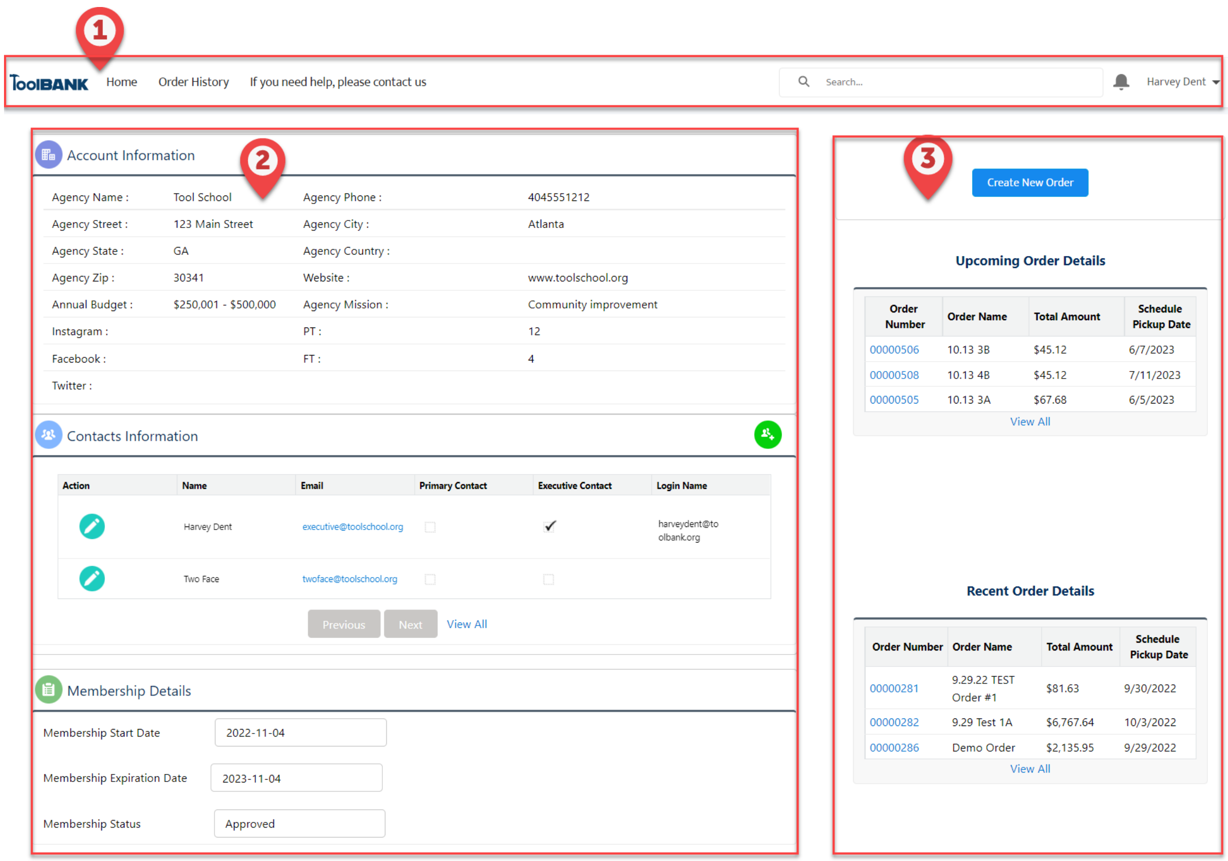
Until you receive this email and create a password, you will be unable to access your ToolBank account and order tools from us. If you do not receive this email, please contact the ToolBank.

Accessing Your ToolBank Account

- Navigate to: https://toolbank.my.site.com/agency/s/login
  Remember to bookmark the site for future use.
- Enter your username and password and click "Log in".

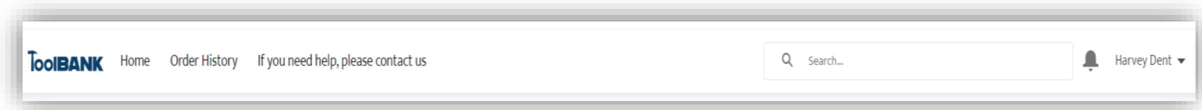


ToolBank Home Screen



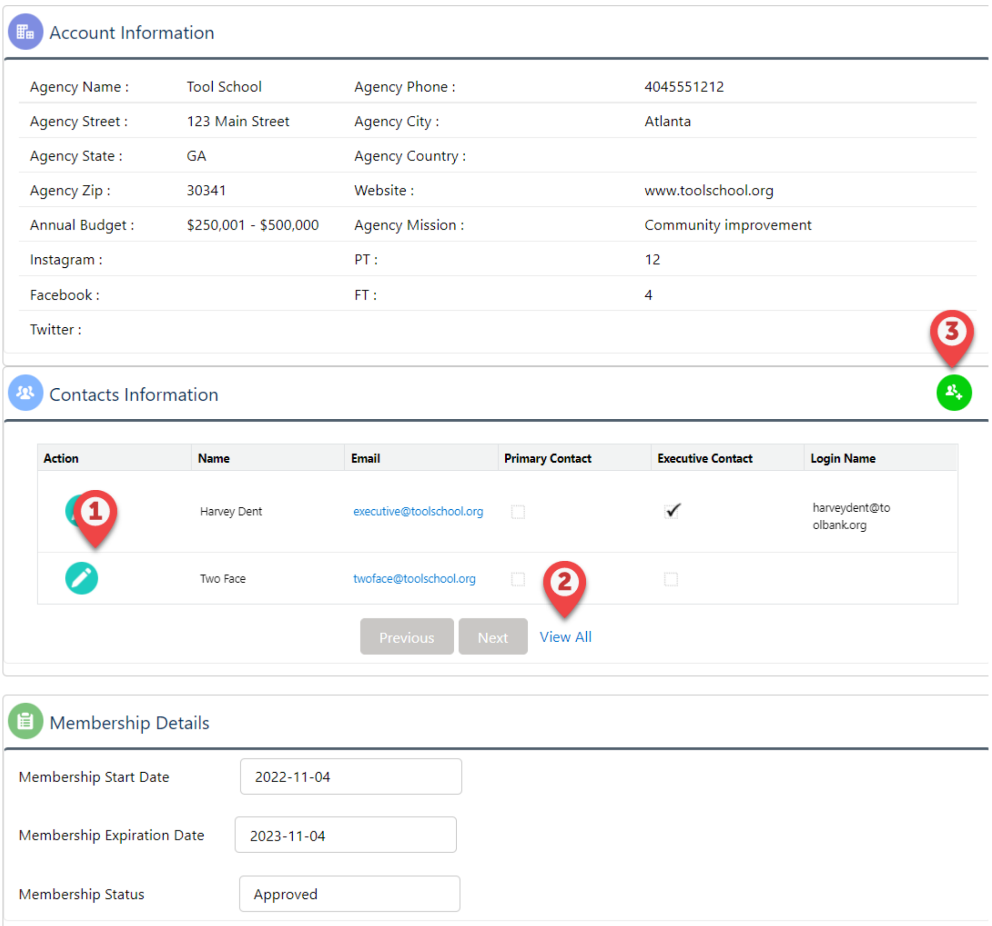
The 'Home' Screen is divided in to 3 main sections that will provide an overview of your Organization and Orders as well as a navigation point to almost all features available to you.   These sections include the 1 - Navigation Bar, 2 - Your Information and 3 - Order Information.

Navigation Bar



- **Home:** Returns 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.

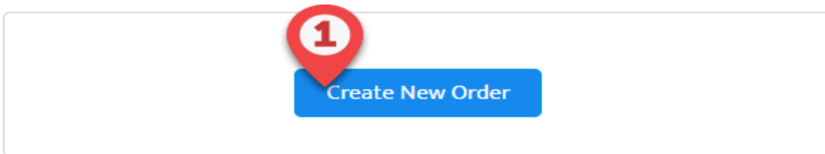
Your Information



- **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. Only the Executive and Primary Contacts will have the ability to edit existing or add new contacts.
  2. Clicking the pencil allows you to edit the specific contact record.
     - To edit an email address, please contact the ToolBank directly.
     - Your Member Agency can only have one Primary Contact. If you wish to change your Primary Contact, open the contact you would like designated as primary can check the "Primary Contact" box. You will be asked to confirm this change. Once confirmed the new contact will be updated as primary

and the previous primary will no longer be designated as the 'Primary Contact'.
    - Rules for updating the Executive Contact are the same as updating the Primary Contact.
    - **NOTE:** The Contact marked primary will receive all emails sent about Orders and Membership and may not opt out.
  3. 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.
  4. 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 and 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

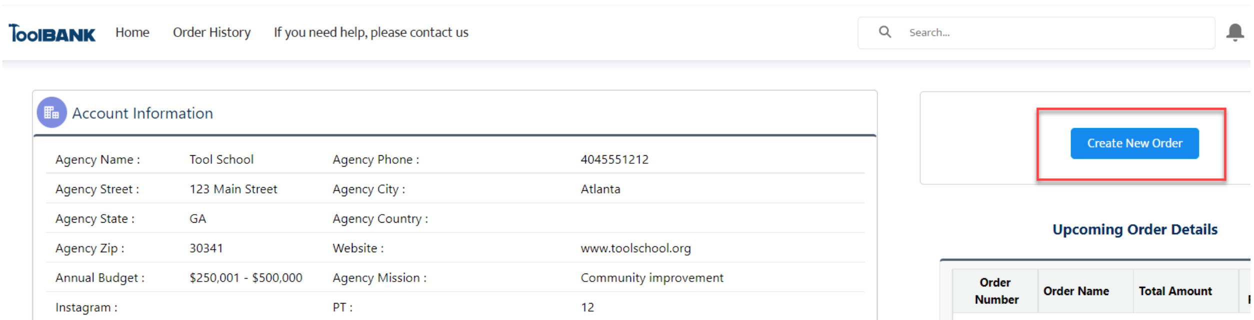
Order Number	Order Name	Total Amount	Schedule Pickup Date
00000281	9.29.22 TEST Order #1	$81.63	9/30/2022
00000282	9.29 Test 1A	$6,767.64	10/3/2022
00000286	Demo Order	$2,135.95	9/29/2022

View All

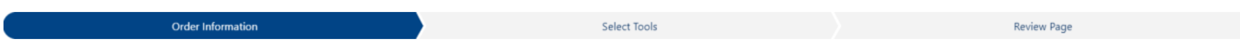
- **Order Actions:**
  1. Clicking "Create New Order" will take you through 3 screens to place your next Tool order.
- **Upcoming Order Details**— Displays your next 5 Orders by Scheduled Pickup Date. To see more, click the "View All" link or click "Orders" in the top navigation bar.
- **Recent Order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



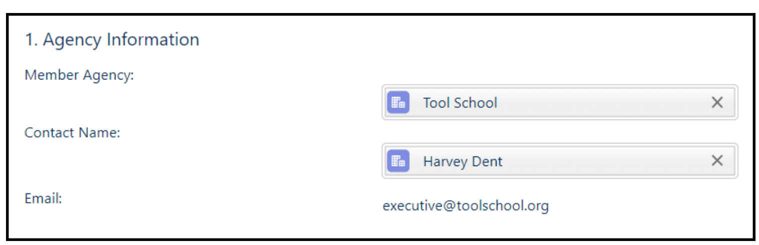
Submitting an order will include three steps. The icons on the top of the screen will let you know which step you are on. You cannot use the icons to navigate. If you started an order on accident, close the browser tab to exit the order.



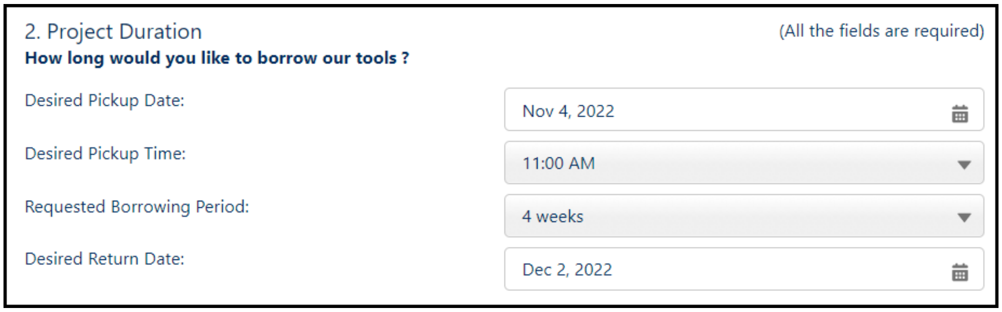
Step 1: Order Information

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

1: Agency Information
Prefills your Name, Email and Member Agency name.

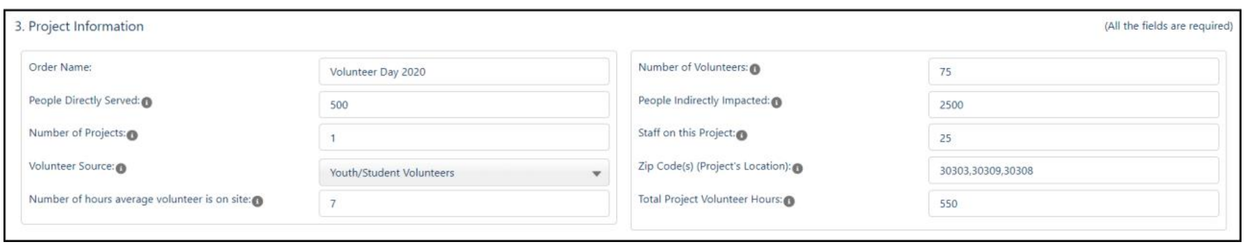


2: Project Duration


2. Project Duration (All the fields are required)
How long would you like to borrow our tools ?
Desired Pickup Date: Nov 4, 2022
Desired Pickup Time: 11:00 AM
Requested Borrowing Period: 4 weeks
Desired Return Date: Dec 2, 2022

- 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.

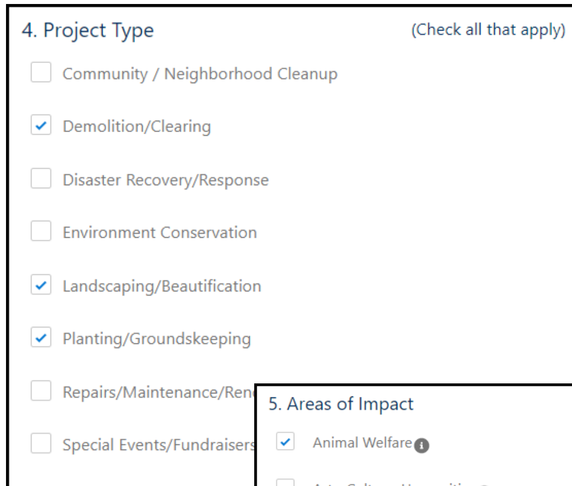
3: Project Information


3. Project Information (All the fields are required)
Order Name: Volunteer Day 2020
People Directly Served: 500
Number of Projects: 1
Volunteer Source: Youth/Student Volunteers
Number of hours average volunteer is on site: 7
Number of Volunteers: 75
People Indirectly Impacted: 2500
Staff on this Project: 25
Zip Code(s) (Project's Location): 30303,30309,30308
Total Project Volunteer Hours: 550

- 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

- Please select all that apply.

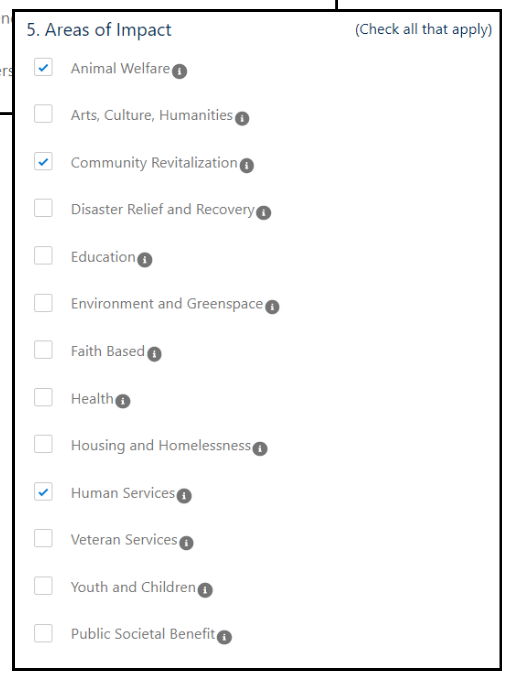


4. Project Type (Check all that apply)

- [ ] Community / Neighborhood Cleanup
- [x] Demolition/Clearing
- [ ] Disaster Recovery/Response
- [ ] Environment Conservation
- [x] Landscaping/Beautification
- [x] Planting/Groundskeeping
- [ ] Repairs/Maintenance/Ren
- [ ] Special Events/Fundraisers

5: Areas of Impact

- Please select all that apply
- Hover over the information icon (ℹ) to see how these impact areas are defined.

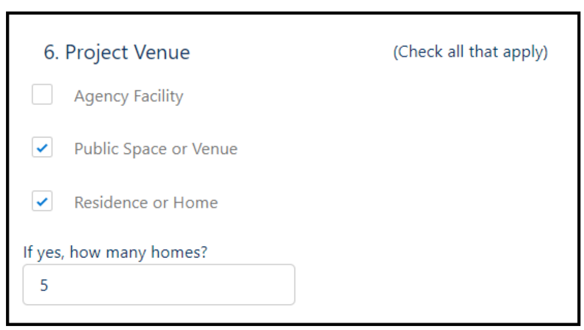


5. Areas of Impact (Check all that apply)

- [x] Animal Welfare
- [ ] Arts, Culture, Humanities
- [x] Community Revitalization
- [ ] Disaster Relief and Recovery
- [ ] Education
- [ ] Environment and Greenspace
- [ ] Faith Based
- [ ] Health
- [ ] Housing and Homelessness
- [x] Human Services
- [ ] Veteran Services
- [ ] Youth and Children
- [ ] Public Societal Benefit

6: Project Venue

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



6. Project Venue (Check all that apply)

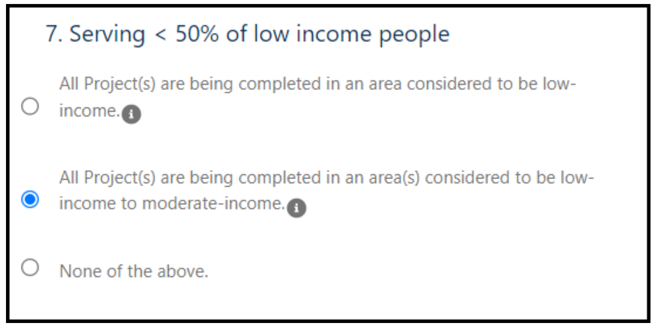
- [ ] Agency Facility
- [x] Public Space or Venue
- [x] Residence or Home

If yes, how many homes?

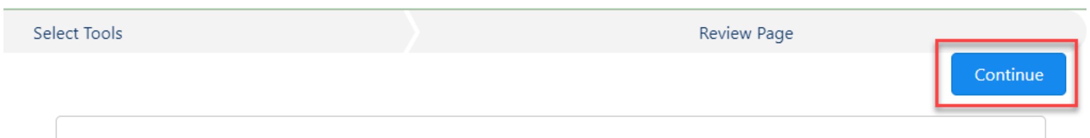
5

7: Serving

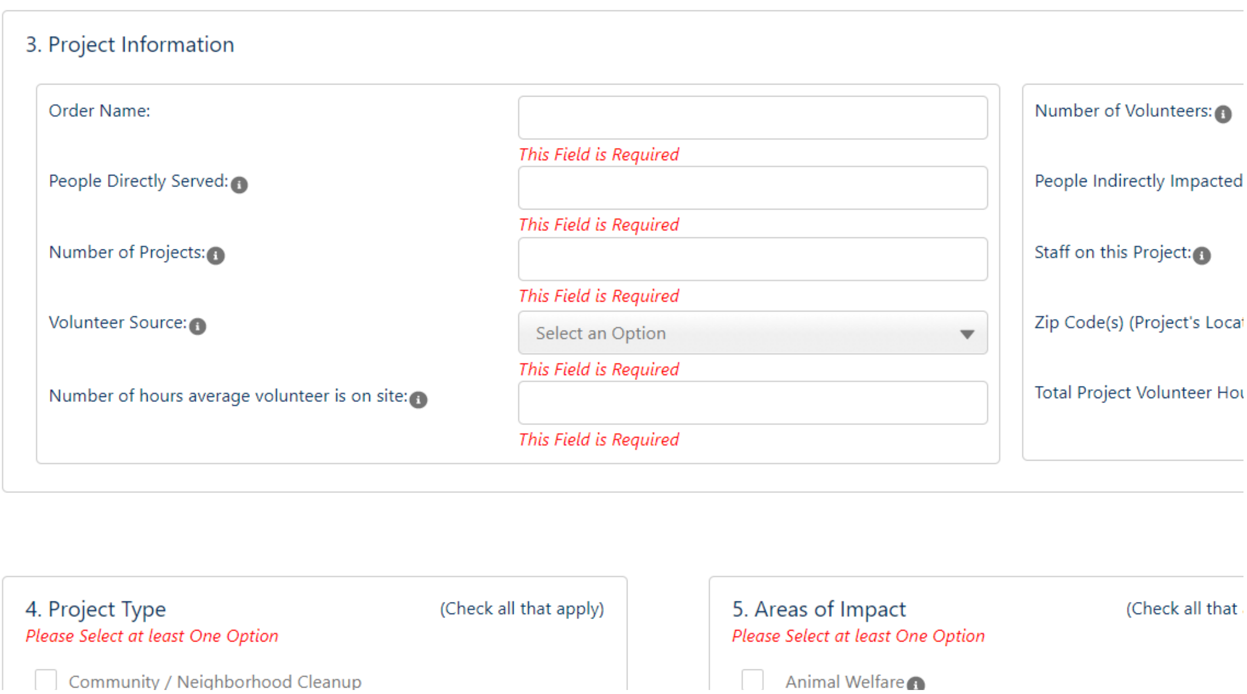
- Please help us understand how our tools are being used in the community by selecting one of these options.



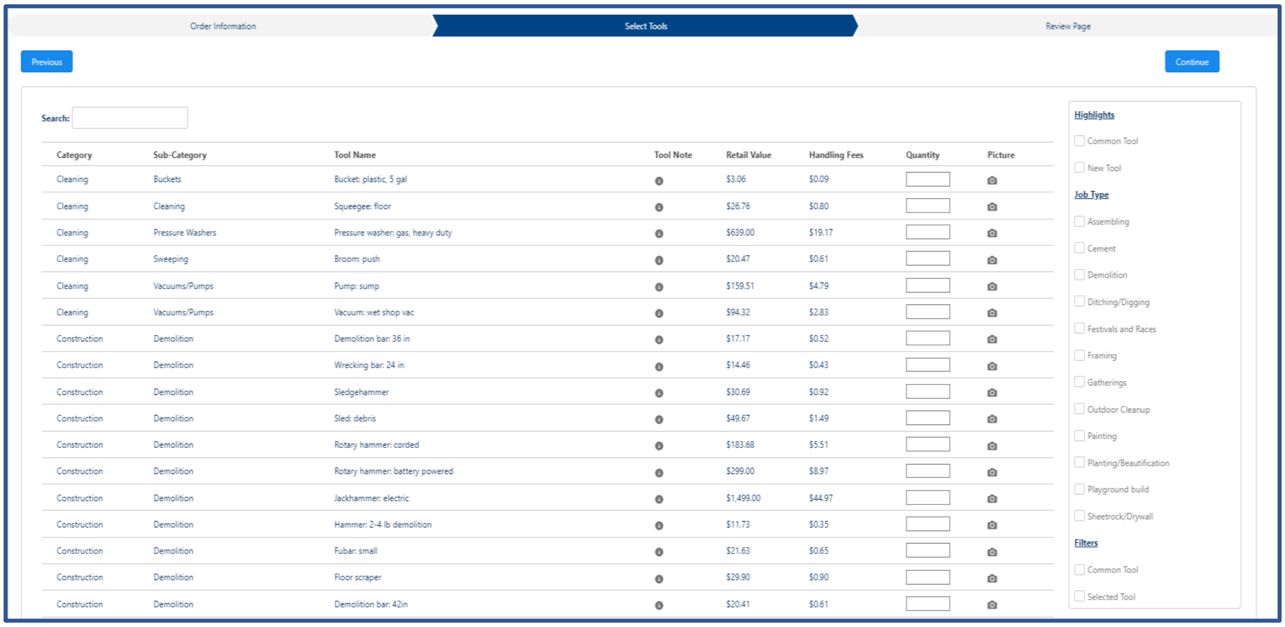
- When you are finished, click the "Continue". Button is found at the top and bottom of the screen.



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



Step 2: Select Tools



Category	Sub-Category	Tool Name	Tool Note	Retail Value	Handling Fees	Quantity	Picture
Cleaning	Buckets	Bucket: plastic, 5 gal		$3.06	$0.09		
Cleaning	Cleaning	Squeegee: floor		$26.76	$0.80		
Cleaning	Pressure Washers	Pressure washer: gas, heavy duty		$639.00	$19.17		
Cleaning	Sweeping	Broom: push		$20.47	$0.61		
Cleaning	Vacuums/Pumps	Pump: sump		$159.51	$4.79		
Cleaning	Vacuums/Pumps	Vacuum: wet shop vac		$94.32	$2.83		
Construction	Demolition	Demolition bar: 36 in		$17.17	$0.52		
Construction	Demolition	Wrecking bar: 24 in		$14.46	$0.43		
Construction	Demolition	Sledgehammer		$30.69	$0.92		
Construction	Demolition	Sled: debris		$49.67	$1.49		
Construction	Demolition	Rotary hammer: corded		$183.68	$5.51		
Construction	Demolition	Rotary hammer: battery powered		$299.00	$8.97		
Construction	Demolition	Jackhammer: electric		$1,499.00	$44.97		
Construction	Demolition	Hammer: 2-4 lb demolition		$11.73	$0.35		
Construction	Demolition	Fubar: small		$21.63	$0.65		
Construction	Demolition	Floor scraper		$29.90	$0.90		
Construction	Demolition	Demolition bar: 42in		$20.41	$0.61		

- 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 ( ) 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 a % 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 ( ) will display a picture of the tool.

Finding the Right Tools

This page offers Search, Highlight 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 an Extension Pole may also need to be included in the order.

Cleaning	Cleaning	Floor buffer: corded, high speed		$1,200.00	$36.00		
Cleaning	Cleaning	Floor sweeper: medium sized, heavy duty, battery powered		$0.01	$0.00		
Cleaning	Cleaning	Floor sweeper: large sized, heavy duty, battery powered	May also need: Extension pole		$0.00		
Cleaning	Cleaning	Window scrubber		$14.65	$0.44	25	
Cleaning	Cleaning	Steam cleaner: handheld		$13.98	$0.42		
Cleaning	Cleaning	Squeegee: window		$13.98	$0.42	25	

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

Order Information | Select Tools

Previous

Search: pole

Category	Sub-Category	Tool Name	Tool Note	Retail Value	Handling Fees	Quantity	Picture
Cleaning	Cleaning	Scrub brush: pole mounted		$15.65	$0.47		
Construction	Painting	Extension pole: telescoping to 8 ft		$21.74	$0.65		
Construction	Painting	Extension pole: telescoping to 16 ft		$39.98	$1.20		
Construction	Painting	Extension pole: 8 ft, telescoping to 23 ft		$39.98	$1.20		
Construction	Painting	Extension pole: 4 ft		$6.97	$0.21		
Construction	Sanders	Pole sander: 4 ft pole is included		$20.76	$0.62		
Yardwork	Cutting	Hedge trimmer: pole, battery powered		$226.85	$6.81		
Yardwork	Cutting	Hedge trimmer: pole, corded		$90.14	$2.70		
Yardwork	Cutting	Pole saw: manual		$39.98	$1.20		
Yardwork	Cutting	Pole saw: corded		$84.67	$2.54		
Yardwork	Cutting	Pole saw: battery powered		$148.67	$4.46		

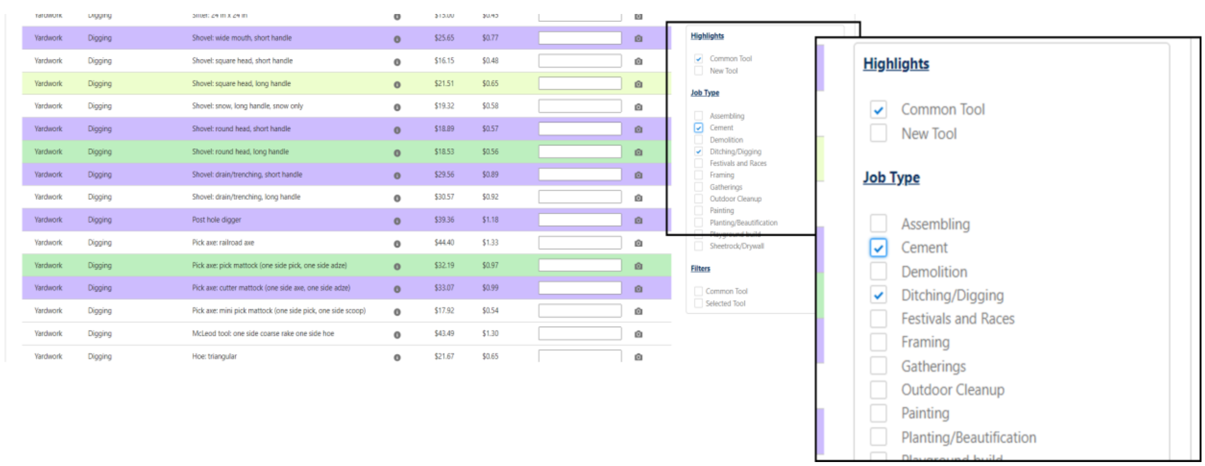
- Delete your search criteria and press "Enter" on your keyboard again to return to the full inventory of tools available.

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.

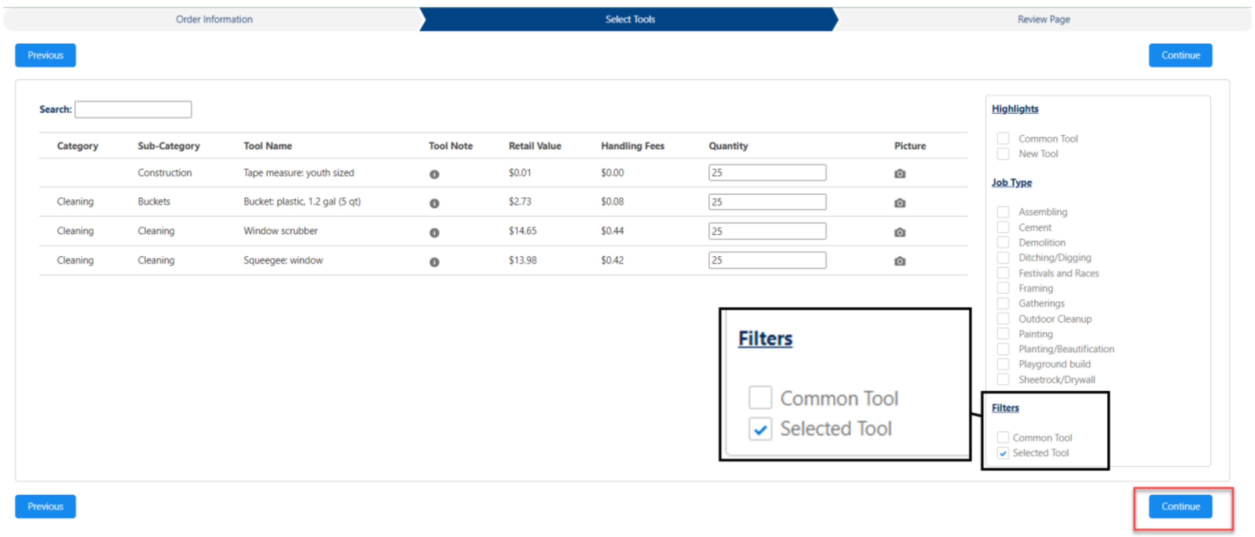
- Common Tool: Tools most often borrowed
- New Tool: Tools added to inventory in the past year
- Job Type: Tools often required to complete work of this type



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

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.

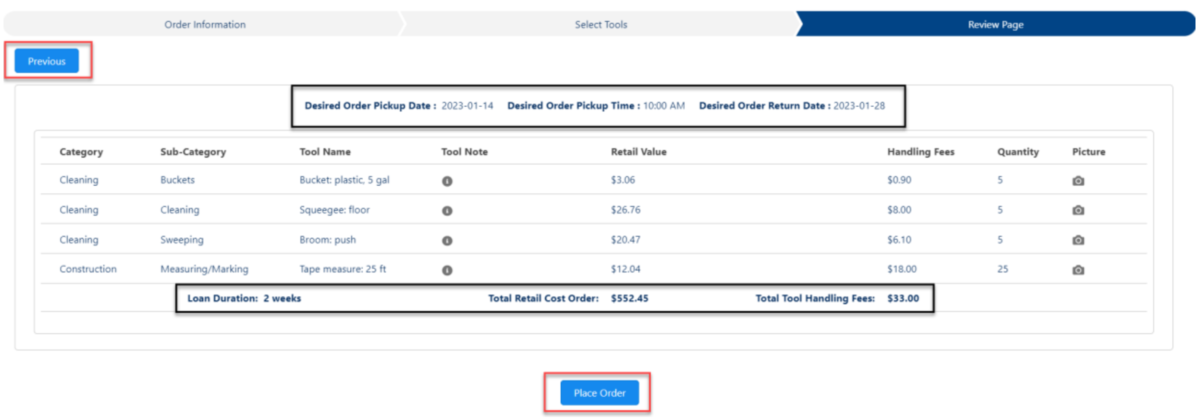


- Once you have the correct tools in your order, click "Continue" to proceed to the final step.

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.

  NOTE: Total Tool Handling Fee is a quoted amount based on the borrowing time provided.   Charges may change after order review by ToolBank.
- 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.

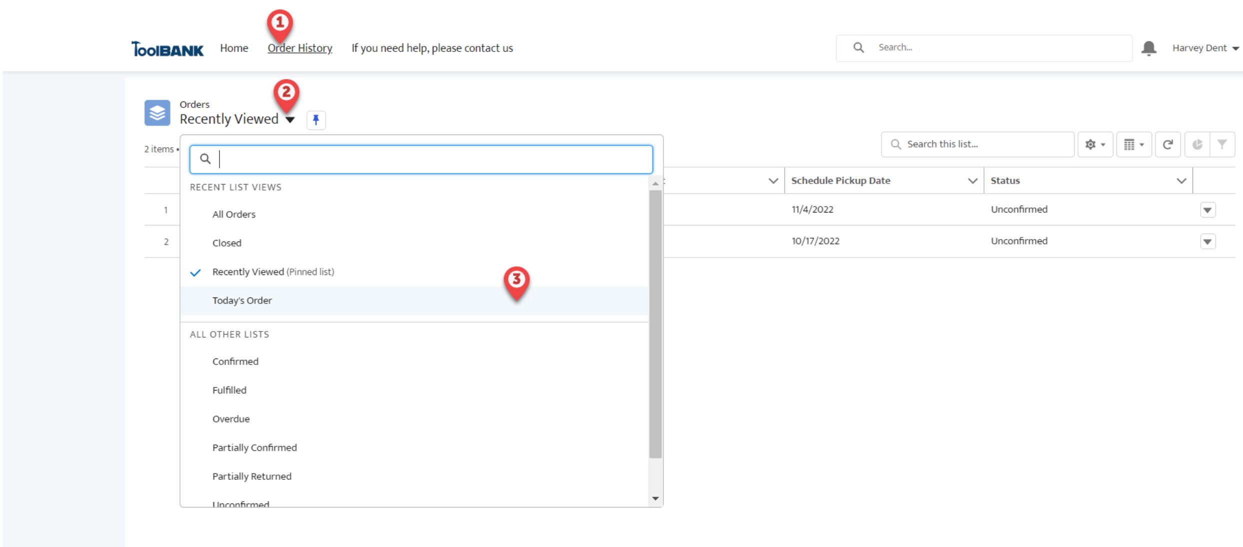
ToolBANK

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.

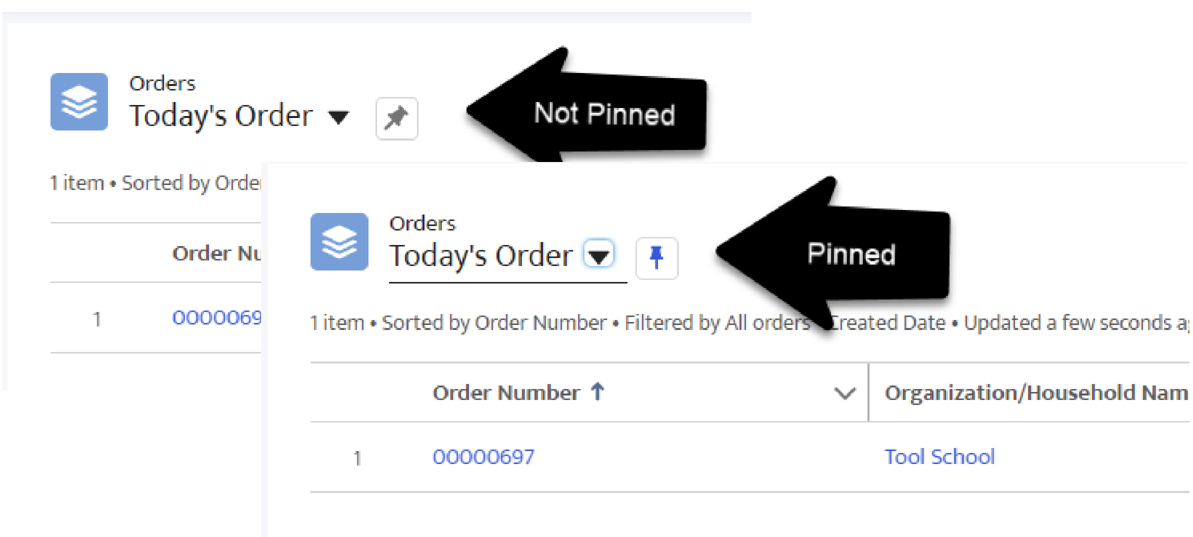
Orders

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 (2) next to the Order icon will show you the filters you can choose.

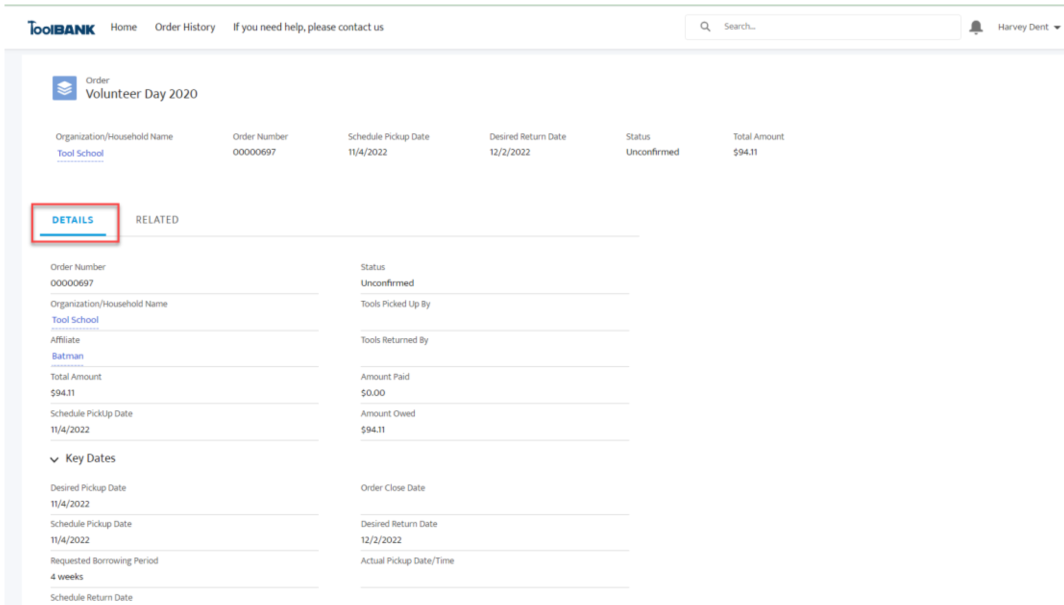


- If there is a list you prefer to see every time you click “Orders” from the Navigation bar, you can select it then click the “Pin” icon. To change this selection later, just select another list and click the “Pin” icon again.

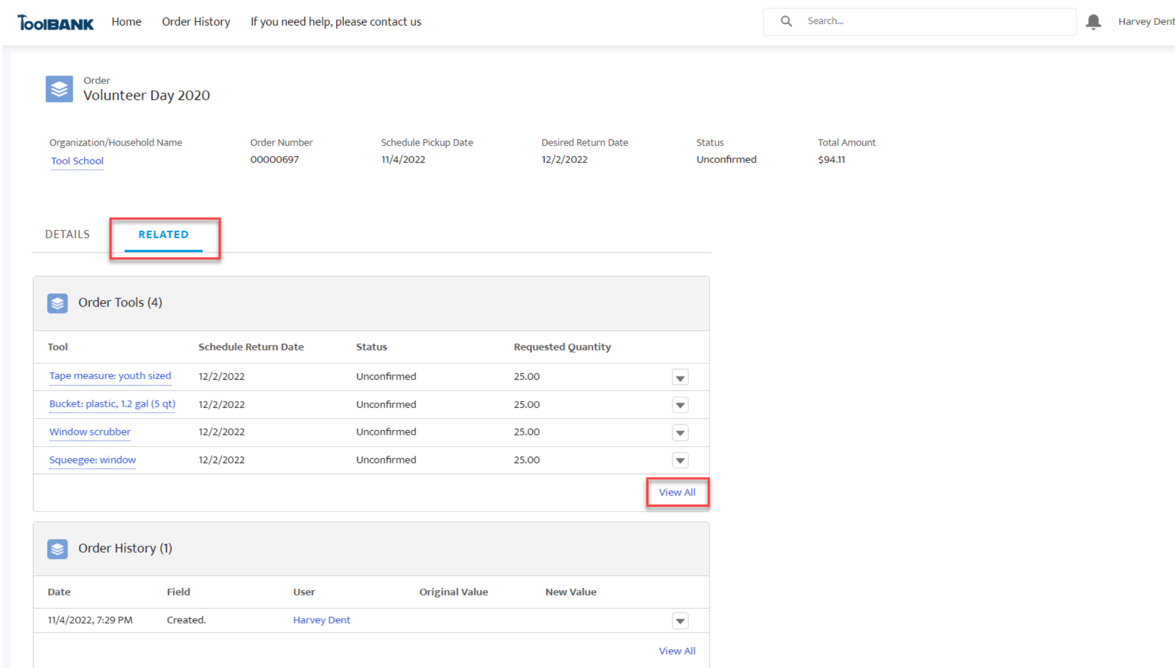


Order Details and Related

- 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.