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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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.

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

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”.

![Screen shot of ToolBank login page]
The ‘Home’ Screen is divided into 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

• **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

- 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
- Please select all that apply.

5: Areas of Impact
- Please select all that apply
- Hover over the information icon (†) to see how these impact areas are defined.

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 (📸) 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.
- 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.

- 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
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.
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.