myCSA: User Manual

Updated 06/2015
Let’s Get Logged In

This document is a quick reference guide for users to help explain the basics of how to use CSA Complete to manage your interactions with seasonal consignment sales in which you plan to sell or work. There are many more answers to Frequently Asked Questions about each page on the website itself. Those can be found wherever there is a Frequently Asked Questions button on the screen. You will find these very helpful.

myCSA is the newest version of the CSA Complete User Portal. Access to the website requires a secure username and password that allows myCSA to recognize you.

STEP 1: Login to myCSA
If you do not already have an account, it’s easy to create one via the link on the myCSA Login page. You do not need to get a new account every season, if you have sold in a CSA supported sale in the past, your username and password has been ported over. The Login screen shown on the left is your first and only way into the myCSA system for registration and inventory management.

NOTE: If it has been more than 60 days since you last logged into myCSA, you will be asked to verify that your contact information is still up to date.
STEP 2: Familiarize yourself with your home page.

At the top of every page is a reminder of what username you used to log in. This is helpful if you have multiple usernames or help others.

My Account is the place to change your personal information, like email, phone, username and password. Logout will terminate your session.

This menu is how you move through the myCSA system. This menu will be on every page. The menu titles turn dark blue as they are highlighted or as they become the current page.

Here will be a summary of all sales you are registered to sell and/or work with.

Use this Magnifying Glass icon to quickly go to the details about that registration, such as drop off time, shift times, etc.

Here is important information you need to know, including links to CSA Update summaries and system wide notices regarding your account.
My Registrations

STEP 1: Click on the Register for a Sale Menu to register to sell or work in any of the CSA supported sales. This screen will always be available to reference back to once you have registered. All your registration information for the season in ONE spot! In this example screen, you can see 3 sales: CSA Demo Sale and Wildwood Kidzsense. The only sale that is currently open for seller registration is the CSA Demo Sale, which is why it has both a Register to Sell and a Register to Work link visible. The other sale has not registration buttons available because it has not opened registration yet.

STEP 2: After registering to sell and/or work, you're my Registration page will update with your registration information. Seller registrations require Sale Administrator Approval, so the status will remain PENDING until such time as your entry is reviewed.
My Inventory

The My Inventory Menu consists of 3 submenu options. Input Inventory, Transfer Inventory to a Sale, Inventory Reports and Retrieve PDF. myCSA now allows you to input and make alterations to your personal inventory all year long. The concept is shown in the diagram below.

1. You will maintain your Personal Inventory, even printing tags is possible.
2. Register for a sale, wait for approval and seller number assignment!
3. Transfer your personal inventory to a sale, choosing some, all or none of the items in your personal inventory.

### STEP 1: Input Inventory

This screen allows you to add items or view your current inventory. All fields with a "**" are mandatory fields for the items. There are many new sizes and categories to choose from, try to be as specific and accurate as possible. Again take note of the Frequently Asked Questions Button.

**Item #** will increment automatically, or begin with one greater than your last item number assigned. **Use your TAB key to move between fields for easy keyboard entry.**
You can make mass changes to the reduce and/or donate settings in your inventory.

On the Inventory List, click on any column headings to sort by that column. To delete or change an item on the list, click the Edit link next to the item and its details will present in the Add/Edit Inventory frame.

There are several buttons that allow for duplicating and/or deleting. Use them with caution as the results are not undoable.

Once you click the EDIT link next to an item, your Add/Edit window has a new feature. This feature allows you to enter item information ONE item, then duplicate that item information any number of times. This is helpful for books, or toys.
STEP 2: Transfer your Inventory

This screen allows you to transfer some or all of your Personal Inventory to any sale that you are registered & approved for AND have a seller number assigned. Again take note of the Frequently Asked Questions Button. This screen is very busy, let’s take a look.

The My Inventory tab show your Personal Inventory. You can switch between tabs at any time.

Step 1: Select a Sale to export to. Again only sales you are registered & approved for will be options.

Step 2: Click either the Transfer All link or Transfer ONLY Checked Items button.

Put a check in the box next to any item you want to specifically transfer. Be sure to choose the right button to submit the transfer.

In this example, we are transferring item number 1 to CSA Demo Sale.

A click of the Transfer ONLY Checked Items button and my items are transferred and a status message of “Item added to CSA Demo Sale” is presented in the status column.
By clicking on the **CSA Demo Sale tab**, you can view what items have been transferred to that sale. You will have a tab for each sale that you are registered and approved for, until the Inventory cut-off date has passed. When you click on a sale tab, notice how the **My Inventory tab** now moves to the background. On this screen you can only delete items.

![Image of My Inventory and CSA Demo Sale tabs](image)

Let’s talk more about the features of this screen.

- You may need to click the **REFRESH button** after you transfer to get your items to appear on this tab.

- The application will only present 200 items at a time for **VIEWING** in the My Inventory tab. A red message will appear alerting you that you have more than 200 and a page selector tool so that you can view your other items. Directly under the Search bar, a count of items tells you how many you have and how many are showing currently.

- In Step 1, you have to choose a sale to transfer to from the drop down box. Each sale that you are **REGISTERED AND APPROVED** for will be listed here. Also, in parentheses is the **MAXIMUM** number of items that sale permits to be transferred. If you try to transfer **ALL** of your inventory and it is over the limit, the system will only transfer up to the limit, discarding the rest.

- Also note that in using the **TRANSFER ALL button**, you will be replacing the inventory that might have been previously transferred to that sale with the contents of My Inventory. Again, rules apply as to the quantity of items transferred.

- **All items are given a Status of UNPRINTED upon transfer.** This field is used later when you print your tags.
STEP 3: Print Inventory Reports

Upon choosing one of the links, a new browser window will open and present you with an inventory listing of all your items for that sale.

At the bottom of each report is an estimated cost of goods as well as a total item count.
Retrieve PDF

After the sale that you participated in has completed, a PDF file of your sale summary report will be created and stored for retrieval later. Most sales choose to email this report directly following the sale, however some sales may choose to print the reports and hand them out at pickup. Either way, the PDF file of your report for EACH sale you sell in, will be stored here for your convenience until the beginning of the next season.

To retrieve the file, click the Download PDF link and the download will begin immediately. Your browser may warn you or ask for permission to download the file. The filename is always SellerPDF.pdf. It will likely be put on your computer in the Downloads folder.

If you want to simply view this file instead, click on the View PDF link. You must have an Adobe Acrobat Reader installed and again, your browser may ask for permission or pop-up allowance to continue.

Here is an example of what the report will look like.
NOTE: Some sales do not allow tags to be printed by sellers and will require you to use their preprinted tags. Check with the specific sales’ Seller Guidelines before printing and tagging your items.

There is currently only one option for printing tags, the *Print My Tags Menu*.

**STEP 1:** Choose which sale you (ONE THAT YOU HAVE TRANSFERRED ITEMS TO) want to print tags from. *Some sales will allow you to print tags BEFORE the sale registration actually opens. The second half of the screen will show the sales that participate in this option. Otherwise, you must wait until you transfer items to the sale (AFTER registration and Approval).*

Click the **Choose Tags to Print** button for the sale you want to print from and you will now have the option to **MARK** all your tags or choose to **MARK** only certain tags to print.
On the left side is a filter box. This allows you to only view and then subsequently mark certain items.

Once you have put a check in the box next to the item(s) that you want to mark for print, be sure to click the **Update Status** button. Then you can filter additional items, repeating the process until all items that you desire to print have been updated to a status of MARKED.

Now you can click the **Print Marked Items** button and a new page containing your tags will start to load. Please do not attempt to print tags until the button in the top left corner changes.

AND you are shown an alert box that tells you that your tags have loaded completely and you can now print.
STEP 2: Sort your tags and print

Tags will appear in a new browser window. You now have the option to sort the tags before printing them. Use the dialog boxes to choose your sort order and the sort direction.

Tags now print out correctly with page breaks. However due to your screen size and font size, it is suggested that you print a test page of 1 to 1 pages before printing your entire set. Click the Frequently Asked Questions button for more information about printing and sizing errors.

When you are ready to print your tags, click the Print My Tags button.

You can apply different sorts to your tags. When you want to make changes to the sort order, you must click the Perform Sort and/or Filter Button.

The dark grey area will give you a summary of what you the system is going to print for you. You may have more than one page to print.
## Change Log

### 5/2013
1. Password Lookup function improved.
2. New feature (for sales that allow it) to print tags in between seasons.

### 12/2013
1. Added new Retrieve PDF Option

### 6/2014
1. My Inventory Page updated, category moved and made mandatory. Size options now dependent on the category.
2. Changed the look of Home page and added quick link icons.
3. My Inventory Reports has been changed to better show available reports. If sale supports it, the Inventory Sales/Status report will be available during the sale as well.

### 01/2015
 Added new filter capabilities to the Transfer Inventory to a Sale page.

### 06/2015
1. New Choose Tags to print page with check box selection of tags to print.
2. Updates to Register for a Sale page. Buttons instead of links for registration.
3. New functions and features on My Inventory. Including cookies to save info, mass changes and multiple delete/duplicate options.
4. Tags page, removing the filter options.