



Getting Started With MySaleManager.NET

Welcome to MySaleManager.NET! We are glad you chose us to be the provider for automation services at your Consignment Event. This guide is designed to help you get started with MySaleManager.NET in a step by step format which we hope will be easy to understand and follow. Should you have any questions, please feel free to contact us at info@mysalemanager.net

This guide is organized beginning with the time you receive your "Welcome To MySaleManager.NET" email and will take you through setting up your account for the first time and what to do with your account before, during, and after your first sale.

Step 1: "I've got my Welcome to MySaleManager.NET email. What do I do now?"

When you get your welcome email, this signifies that your account has been fully set up, your first sale's fees are paid and you are ready to login to your admin portal for the first time.

The first thing you should do is to save your "Welcome to MySaleManager.NET" email in a safe place. This email has all your login, password and registration code information, should you need to refer to it in the future. The important pieces of information in the Welcome email are:

- **Your Partnercode.** This is the code that identifies your account to the MSM system.
- **Userid & Password.** These are the login credentials specific to your account. You use these to login to the admin portal. This is the only place in MSM that these credentials are used by default.
- **Sale Manager Registration Code.** The POS software that comes with your subscription to MySaleManager.NET is called "Sale Manager". When you download and install Sale Manager for the first time, it will install in a Demo mode. You must enter this registration code into the software to remove the demo limitations and make the software a fully registered version. You need to enter this registration code into each of the computers at your sale as you set them up. This registration code is specific to your account and should not be shared with anyone else. Please refer to the Sale Manager User's Guide for more information about entering your registration code into the Sale Manager program.
- **MSM Barcode Print Utility Registration Code.** Just like Sale Manager, the MSM barcode print utility also requires a registration code to function properly. (you only need this if you use non-inventory mode)

Now that you have safely stored away your "Welcome to MySaleManager.NET" email, you are ready to login to the admin portal for the first time.

Step 2: Login to the Admin Portal and complete the setup process for your account

You can login to the admin portal by using the link provided in your welcome email, or you can go directly to www.mysalemanager.net and click on the "Admin Portal" link on the left. When you login for the first time a message will appear telling you that you do not have an active sale set up. This is normal when you login for the first time. Read the message and click CONTINUE.

You are now taken to the "View and Edit Sales" screen. This is the screen that lets you set up your first sale for MSM. Click on the "Create New Sale" link to continue.

You will see a screen similar to the one below appear

MySaleManager.NET

My Account Consignors Workers Barcodes/Tags Other Tasks Mailing List

Create a New Sale
Use this screen to create a new sale. You must create a new sale for each of your upcoming sales. When you mark a sale as "active" all MySaleManager.NET activity will apply to that sale. You can only have 1 Active sale at any time.

Sale Description * Required
Street Address of Sale Location: * Required
City the sale is physically held in: * Required
State the sale is physically held in: * Required
The name of the building where your sale will be held: * Required
Choose this sale's season:
The dates of your sale as they should appear when displayed to users:
The starting date of your sale:
The ending date of your sale:
 Make this my active sale immediately.

Submit

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This screen allows you to set up your first sale with MSM. You can hover over the blue question marks for more information about each field. The main thing that gives some clients problems on this screen is the last three date fields, so we will explain them in a little more detail here...

- **Dates of your sale as they should appear when displayed to users:** Here you would enter your sale dates as you would want them displayed to users on the MSM web pages, or in emails sent to your consignors, workers, etc. Typically this would be entered as September 1-3, 2007.
- **The starting date of your sale:** This is the date that you consider to be the starting date of your sale. It can be whatever date YOU consider to be the start of your sale, such as your setup date, your first drop-off date, or your first day of shopping. You should enter this date in numeric format, such as 9/1/2007.
- **The ending date of your sale:** This is the date that your sale ends. This can be either your last day of shopping, or your pickup day. This date should be entered as 9/3/2007.

It is very important that when setting up your very first sale, that you leave the "Make this my active sale immediately" field checked. You always have to have an "active" sale, and you will have to come back to this screen if you do not leave this checked.

Once you have entered everything click on submit. You will receive a confirmation message that your changes were saved successfully, and then you will receive another prompt telling you that you do not have a public disable date set yet.

The public disable date is a very important piece of information to MSM. It is the date that tells when your MSM pages should not longer be available to the public. Typically, this is set to the night before your first drop off day. Once your sale begins, you do not want your consignors accessing your online MSM pages, because you will have transferred data from your online account to the POS software at your sale, but more on that later...

Read the rest of the message on the screen, then click continue. You will be taken to the Account Settings Page, a portion of which is shown below.

MySaleManager.NET

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Modify Account Settings

Use this form to modify the settings for your account. Changes to this screen can modify the way your account behaves.

GENERAL SETTINGS: (hold your cursor over ? for help.)

Name of your sale as it should be displayed to your users on our pages: ?

The URL (website address) of your sale's website: ?

Does your sale have a discount day? ?

Date and Time your MySaleManager.NET pages should no longer be available to the public (FORMAT: MM/DD/YYYY HH:MM AM/PM): ?
Current Server Time: 7/16/2007 10:08:55 PM

Do you want your consignors to be able to view their estimated sales online? ?

Select the consignment percentage to use when calculating estimated consignor earnings ?

If you plan to limit consignor registrations to a certain number, enter it here. Use 0 for unlimited registrations. ?

Do you plan to keep track of inventory at your sale? (IMPORTANT: [more info](#)) ?

The next two questions only apply if you selected 'Yes' to track inventory at your sale:

Do you want to limit the number of items a consignor can have in their inventory (limit the number of items they can bring to your sale)? ?

If you plan to limit the number of items a consignor can have in their inventory, enter the maximum number of inventory items ?

NOTIFICATIONS:

Notify me of consignor registrations at this email address: ?

Notify me of worker activity at this email address: ?

Notify me of New Mom Presale Registrations at this email address: ?

Email address where barcode print files should be sent: ?

Email address where all other notifications should be sent. (this should be your primary email): ?

This is a very important screen. It is where you tell MSM how you want your account to function. Click on the blue question marks for help on any question.

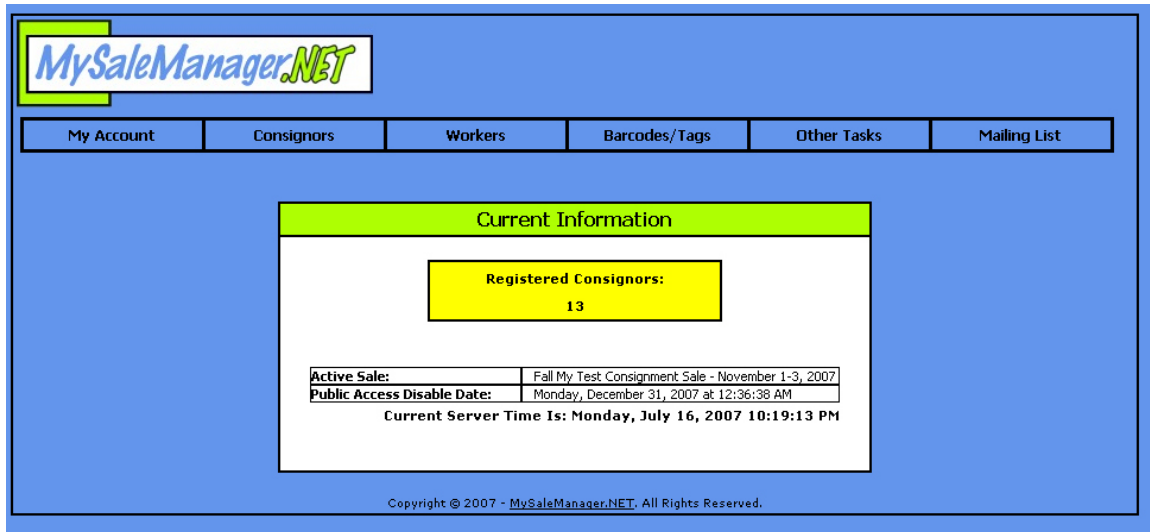
The Public Disable Date is the fourth box down. This is how you control whether or not the public can access your MSM pages. Notice that this date is accurate up to the second. You should also note the current server time just below the boxes where you will enter your public disable date. MSM's web server is located in the Central Time Zone (CST). If you are not in the Central Time zone, you will want to take this into account when setting up your public disable date.

Controlling the public's access to your MSM pages is very easy, using the public disable date. If the date entered in the box is in the past, then the public cannot access your MSM pages. If it is in the future, then your MSM pages will be available to the public until the public disable date arrives (remember, it is accurate up to the second). You can change this date at any time to enable/disable public access to your account.

Since you are just setting up your account, you might want to leave the public disable date set in the past until you have your account complete set up and ready for use by your consignors.

After you have updated all the settings on this screen, click the submit button and the bottom of the screen. A message will appear telling you that your account changes were successful. You may get prompted again about your public disable date. If so, just click continue. You will be brought back to the Account Settings page. Verify that your public disable date is set like you want it, and then click Submit

again. You should then receive a message that your account settings were updated successfully, and then you will be taken to the Admin Portal home page, which is shown below.



MySaleManager.NET

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Current Information

Registered Consignors:
13

Active Sale:	Fall My Test Consignment Sale - November 1-3, 2007
Public Access Disable Date:	Monday, December 31, 2007 at 12:36:38 AM

Current Server Time Is: Monday, July 16, 2007 10:19:13 PM

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When you reach this screen, you have completed the initial set up on your account. Congratulations!

Step 3: Setup Specific Areas of Your MySaleManager.NET Account

In Step 2, you completed the first time set up of your account. Now you are ready to tell MSM about the other specific things about your currently active sale.

Work shifts:

Most sales make use of volunteer workers. MSM offers online volunteer registration and online signup for specific shifts. For MSM to be able to perform this function, you need to let MSM know what work shifts are available. You do this by using the WORKERS menu to add work shifts.

A few common questions we hear from new clients when setting up work shifts:

1. What does it mean to mark a work shift as private?

A private work shift is one that does not appear in your volunteer schedule when viewed by the public; therefore the public cannot select it and fill any of the slots on it. It is designed to let you create work shifts that you can fill personally with hand-picked workers.

2. What if I want to have a work shift that involves bartering?

If you want to allow volunteer workers to sign up for shifts that involve providing services rather than time spent working at your sale, use the Notes field to indicate what the service is, and use the slots field to indicate how many people can provide this service. Enter "bogus" times, such as 12:00am to 12:01am and enter the date that you expect the good or service to be provided.

Drop Off Shifts:

Drop off shifts work under very much the same principle as Work Shifts. If you don't plan to use drop off scheduling, you don't need to do anything with Drop Off shifts. If you do plan to use it, you will find Drop Off Scheduling functions under the OTHER TASKS menu. You add drop off shifts just like you added work shifts.

Selecting Active Categories:

"Categories" are the categories a consignor chooses when entering their items online if you are using the inventory system. You should review the list of categories and if there are categories of items that you do not accept at your sale, you should uncheck the boxes next to them so they will not be active and cannot be chosen by a consignor when entering their items online. This only affects you if you are using MSM in Inventory mode. You will find this option under the OTHER TASKS menu.

Referral Sources:

Referral Sources are how you control what appears in the “Referred By” drop-downs on your MSM pages. You should review what is there and set the options as you would like them to be. You can access this feature from the OTHER TASKS menu.

Step 4: Add your MSM links to your website, so your consignors can access your MSM pages

You will find the links that you need to add to your website under the MY ACCOUNT > WEBSITE LINKS menu option.

You are not required to use all of the links. If there is a feature you do not plan to use, such as Drop Off Scheduling, then don't add that link to your website.

The links provided are the full HTML code for the link. If you edit your website yourself, by directly manipulating the HTML of your website (not using a site builder or WYSIWYG editor like FrontPage), then you can copy and paste these directly into your website, and just alter the text of the link so it will say what you want it to.

If you use a site builder or WYSIWYG (What you see is what you get) editor, then you cannot paste these directly, but you need to alter them a bit. Typically these kinds of editors have a button you click that popup a wizard asking you to specify a target of the link. When this is how you edit your website, you should only paste a portion of the provided link into your website editor.

You will notice at the top of the website links screen is a toggle button that changes the links between HTML or TARGET ONLY. If you are editing the HTML of your website directly, then the HTML links are the ones most suited for you. If you use some kind of site builder, then you will probably want to use the TARGET ONLY links for pasting into your website.

If you want your MSM pages to appear as a new window (which we recommend), then you will need to look for a box that says “open in a new window”, or where you can specify target and set it to “_blank”

Once you have added your links, click on them and make sure they work.

IMPORTANT THINGS TO REMEMBER REGARDING LINKS:

- You can only link to pages specified in the links on the WEBSITE LINKS page. Linking to any other page will give you unpredictable results. It may work sometimes, but not always (there is a technical explanation, but I won't go into it here...)
- Don't forget to put your partnercode in the link. It is critical!
- If your consignors are having issues using your links, make sure they have not “bookmarked” an MSM page (such as a login screen). MSM does not work this way, we want them visiting your website and launching into MSM from there. If your consignor is using a bookmark, it will fail, so they shouldn't do it. It is one of the first questions to ask them if they call you telling you they can't log in.
- Some consignors have issues logging in because their browser is set with higher than normal security settings and it causes them to block a small temporary file that MSM needs to place on their computer in order for them to login successfully. On the MSM login screens is a link called “Problems Logging in?” they should click that link and review that document to help them work through getting their browser set up properly (this happens to about 5% of consignors)

Step 6: Let the registrations begin!

At this point, you have done everything you need to do for consignors to begin using your MSM account.

If your public disable date is currently set to a date in the past, you will want to set that to a date in the future in order to allow consignors to be able to start logging on to the system and begin registering, entering inventory, etc.

If you are using Inventory Mode, there really isn't that much for you to do other than watch your inbox for consignor registrations and use the admin portal to view reports and monitor your sale.

If you are using Non-Inventory Mode, then you will begin receiving barcode orders in your inbox along with consignor registrations, etc. Hopefully by this time you have obtained your Zebra barcode printer and you

have downloaded the MSM Barcode Print Utility, ordered some labels and tested barcode printing to make sure you are set up to print barcodes.

The barcode print files you receive in your inbox will be named something like 1000.bar. The number in the filename specifies the barcode batch number. Each order is assigned a specific batch number so it can be uniquely identified. The consignor is given this batch number after they place their order and should refer to it to specifically identify a particular order if they have made more than one order.

We recommend you save the attached .bar file to a folder on your computer and print them from there. Should you ever lose an order, you can always have another copy of that order sent to your inbox from the admin portal. Look under the BARCODES/TAGS > RESEND BARCODE BATCH FILES menu option in the admin portal.

Step 7: The weeks leading up to your sale

A few weeks out from your sale, you need to start thinking about getting the POS setup on the computers you will use at your sale. Since this is your first MSM sale, it is particularly important that you do a "trial run" with the software to get familiar with it.

You can download the POS software, called "Sale Manager" from the admin portal under the MY ACCOUNT > DOWNLOAD SOFTWARE section. A new version of Sale Manager is released for every sale season as new features are added. If you see that there are patches available, download the most recent patch as well (the one with the highest version number).

In the software downloads section, there is also a MSM Network Configuration Guide. This is a guide to assist you in setting up the simple network required for the computers at your sale if you are going to be using more than one computer for checkouts. We highly recommend that you download and read this guide before attempting to set up your computers.

If you have a friend who is computer savvy, enlisting their help can be beneficial to you, but it is not required. Use the MSM Network Configuration Guide, and the Sale Manager User Guide to assist you. If all else fails and you feel like you are stuck, give us a call and we will walk you through it over the phone. After you have done it the first time, you will find it much easier each sale after that.

You will need to download a copy of your partner data file before you can begin playing around with Sale Manager. You can download your partner data file from the Admin Portal at anytime without hurting anything or losing data. What is important is that you **should not UPLOAD your partner data file back to the admin portal until after your sale is over**. You can download your partner data file by choose MY ACCOUNT > WORK WITH FILES > DOWNLOAD MY DATA FILE from the admin portal menu.

Step 8: It's sale time!

It is the evening before your drop-offs begin, and your public disable date has arrived and your MSM pages are no longer available to the public. Logon to your website and ensure that your account is disabled by clicking on one of your links. You should get a message saying this feature is not available right now. You will also see a warning message in the admin portal telling you that your account is disabled to the public. This is normal whenever your public disable date is in the past.

It is now time to download your partner data file and put in on the "Master Workstation" computer you plan to use at your sale (see the Sale Manager User Guide for more information on the Master Workstation). Go ahead and download a copy of your partner data file and copy it into the folder where you installed Sale Manager on your Master Workstation. If you don't have access to your Master Workstation at this time, just download the partner data file and put it on a thumb drive so you can take put it on the Master Workstation when you do have access to it.

Now that your MSM pages are disabled, your consignors may call you with any last minute things they want to do, such as register for your sale. You can still perform all of these functions, but you need to do the functions using Sale Manager, not the admin portal. Once you have downloaded your partner data file just before your sale, do not change any information in your admin portal, or it will be lost when you upload your partner data file back to the admin portal after your sale is complete. You can perform all the common functions in Sale Manager, such as register/unregister consignors, edit consignor information, print barcodes/tags, work with consignor inventory (inventory mode only), assign/unassign volunteer workers from shifts, etc.

If you want to upload a listing of sold items, or the estimated earnings for consignors, you do that by generating and uploading a consignorsales file (for list of sold items) or a consignortotals file (for estimated earnings). If you are a non-inventory mode sale, you can only generate a consignortotals file. Once you have generated these files from within Sale Manager, you can upload them by logging into your admin portal and choosing WORK WITH FILES > UPLOAD CONSIGNOR SALES/TOTALS FILE. Then choose the file that you generated and upload it. The data will be immediately updated online for your consignors to see.

For detailed information on how to operation Sale Manager at your sale, refer to the Sale Manager User Guide.

Step 9: Whew, my sale is over!

Your sale is over. You have printed seller reports and checks and now you need a vacation...not quite yet! There is one more CRITICAL step you need to perform to wrap things up. You need to upload your partner data file from your Master Workstation back to the admin portal so that all of the changes to consignor data you made at your sale will become available online. At the end of your sale, you should copy your partner data file (this file will be named xxxx.mdb, where xxxx is your partnercode) to your thumb drive and upload it via the admin portal by choosing MY ACCOUNT > WORK WITH FILES > UPLOAD MY DATA FILE.

Once you have uploaded your partner data file you have wrapped up your sale as far as MSM is concerned. Your public disable date is still probably set in the past, and it should remain that way until you are ready to open registrations for your next sale.

It is also important to make sure you have a copy of the REGISTER.MDB and your partner data file from your master workstation. To be sure which files it is you need to get copies of, you can login as an administrator and choose FILE > BACKUP from the Sale Manager menu. The files will be placed in the BACKUP folder in the folder where you installed Sale Manager. Make a copy of this BACKUP folder and store it for safekeeping. You must perform this BACKUP function from your master workstation.

Take your well-deserved vacation!

Step 10: It's time to think about opening registrations for your 2nd MSM sale

Before you know it, your next sale will be rolling around. Here is what you need to do to prepare MSM for your next sale. You will follow these steps for each MSM sale from here on out...

Before you reset your public disable date to some future date and open up your MSM pages, you need to perform the following steps via the admin portal:

- Set up your upcoming sale. Do this by selecting MY ACCOUNT > WORK WITH SALES > CREATE NEW SALE. This is the same screen you saw when you set up your very first sale, but this sale will represent your upcoming sale. Make sure and check the box to "make this your active sale immediately".
- Once you have set up a new sale, you will notice that you have no registered consignors, no work shifts no drop off shifts, etc. This is because MSM only works with one sale at a time and you just shifted it to work with your upcoming sale by creating the new sale and making it active. Whatever sale is marked as "active" is the one MSM works with.
- Go ahead and set up your work shifts, drop off shifts, etc. for the upcoming sale.
- If you want to clear out ALL sold items for consignors, then you can click OTHER TASKS > CLEAR OUT ALL UNSOLD INVENTORY.
- If you ever need to go back and review data for a past sale, just go into MY ACCOUNT > WORK WITH SALES > CHANGE YOUR ACTIVE SALE. You can select a past sale and click "Make Active" and it will become your active sale and that entire sale's data will become active in the admin portal. Just don't forget to set your upcoming sale back to "active" when you are done! **IMPORTANT!** You should always set your public disable date into the past before changing your active sale to disable the public from using your MSM account while you have a sale other than your current sale marked as active. This is because anything a consignor does while a past sale is marked as active will be recorded against that sale...and you don't want that.

After you have everything set up for your 2nd sale, you are ready to open your MSM pages to the public by setting the public disable date into the future.

There is no requirement in MSM for how long your sale needs to be disabled to the public after a sale is complete. You can turn around and create your next sale record the day after your sale is complete and set the public disable date into the future if you want. Some sales prefer to do this so that their consignors can work with their inventory all year long.

That's it. Once you are opened to the public for sale #2, or any sale after that, you can go back to Step 6 and continue from there.