

# How to use your Member Dashboard

These instructions are designed to guide you through using your new dashboard once you have logged in as a Tandre Farm CSA member. Please read these directions carefully to answer questions about editing your information or your weekly CSA subscriptions using the dashboard. Please note, you may use the “contact us” option in the yellow menu on the dashboard to ask questions, you may also choose to call or email us for assistance. Please review this document first to find answers to common questions. You may also find answers to your Frequently Asked Questions about our CSA by going to the Storefront.

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## Dashboard

1. The first section on the dashboard called My Subscriptions, shows your CSA schedule on the calendar. The following are options for your subscription:

“See what’s in my box/view calendar”: displays details about your share including your pick up location, your current CSA subscription, and an option to reschedule a weekly pick up.

“Place box on hold for a week”: allows you to put a hold on your box (see below for detailed explanation) and allows you to “reschedule a single delivery” option (at the bottom of the page).

“Drop point details”: provides the description of your pick up location and protocol.

“Purchase or renew subscription”: will take you to the storefront if you would like to purchase another CSA share when available. The yellow menu on the left also gives you a button to go to the storefront.

2. The second section shows your Order History (this option is in the yellow menu as well). If you see that you have a negative cash account balance, click the “pay off balance” button to make a payment using Paypal. **PLEASE DO NOT EXIT ONCE THE PAYPAL PAYMENT IS MADE. RETURN TO YOUR CSAWARE ACCOUNT TO FINISH THE PAYMENT PROCESS.** Please note: if you have mailed a check, made a cash payment, or sent a Venmo payment, this will be applied when we receive it.

The screenshot displays the CSAware user interface. On the left is a yellow sidebar menu with options: Dashboard, Storefront, Order History (selected), and Contact Us. The main content area has a green header bar with navigation links: My Account, Next Delivery, and Log Out. Below the header, there are four main sections: 1. Subscription management: 'Place box on hold for a week', 'View/Modify subscription', 'Drop Point Details', and 'Purchase or renew subscription'. 2. Order History: 'View order history' and 'Cash Account Balance: -\$70.00' with a green 'Pay Off Balance' button. 3. Settings: 'Change contact info and mailing address'. 4. A calendar widget on the right showing a grid of dates from 25 to 31, with a legend for 'selected date', 'scheduled box', 'on hold', 'canceled', 'farm vacation', and 'delivered'. A red arrow points from the 'Pay Off Balance' button to the 'Settings' section. The footer contains the CSAware logo, contact information (Phone: 734-475-4323, Mail: 2510 Hayes Road, Chelsea, MI 48118), and social media icons.

3. When you scroll down, the third section is “Settings” which allows you to change/update your personal information such as your phone number, email address, and mailing address. Please make sure this information is correct and complete. It is very important that we have multiple methods to reach you regarding your share. You can also add a second email address or more here and subscribe to receive updates or newsletters from the farm, if someone connected with your share is not already on our mailing list.

**Important!** If you see the following message on your account, you must make a payment in order to receive your first CSA share! *Please be sure to return to your CSAware account if you make a payment with Paypal in order to ensure the payment is applied to your account.*

The screenshot shows the CSAware account dashboard for a user named TEST DEB LENTZ. The dashboard includes a sidebar with navigation links: Dashboard, Storefront, Order History, and Contact Us. The main content area features a warning message about an upcoming subscription expiration, a 'My Subscriptions' section with options to view the calendar, place the box on hold, view/modify the subscription, drop point details, and renew the subscription. On the right, there is a 'Delivery Calendar' for May 2021, which is a calendar grid with color-coded boxes indicating subscription status: selected date (pink), scheduled box (green), on hold (grey), canceled (red), farm vacation (purple), and delivered (yellow).

Search for products...

My Account Next Delivery Log Out

Dashboard Storefront Order History Contact Us

Acting as TEST DEB LENTZ Exit

**Warning:** Your subscription is about to expire. Please schedule more deliveries if you wish to continue receiving our products.

**My Subscriptions**

- See what's in my box / View calendar
- Place box on hold for a week
- View/Modify subscription
- Drop Point Details
- Renew subscription

**Delivery Calendar**

May 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

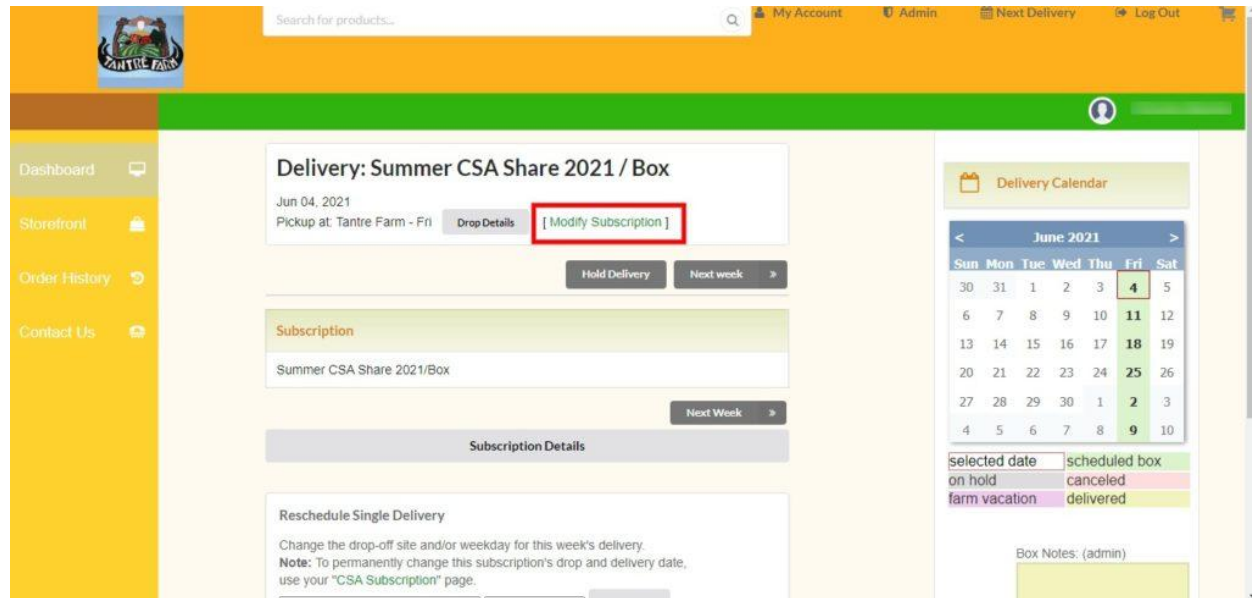
selected date scheduled box  
on hold canceled  
farm vacation delivered

# How To Change Your Pick Up Location

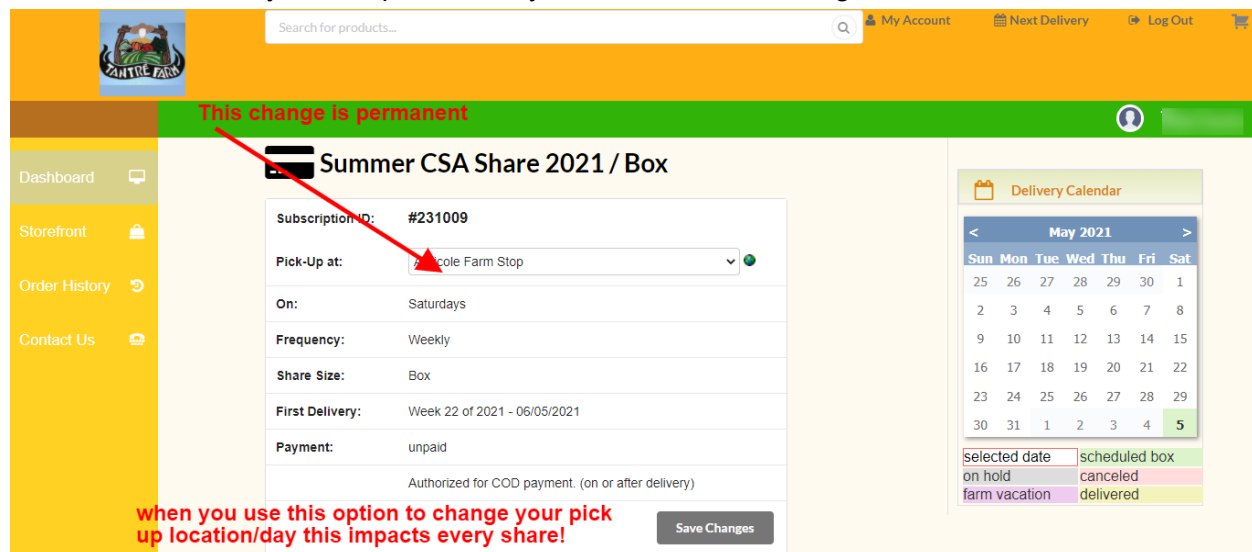
Please make sure all changes to your location are completed by Sunday at midnight for the upcoming week.

There are two options to change your pick up location. The first option is PERMANENT. Use this option if you chose the wrong pick up location when you purchased the CSA, or if you would like to pick up in a different location for the rest of the year.

1. Select "See what's in my box/view calendar" then click "modify subscription"



OR click View/modify subscription" then you will see the following screen:



Please note: when you use this option to change your pick up location, this change is permanent!

Click “save” to update your location change.

2. Use the following option to change one delivery (this is located at the bottom of the “See what’s in my box/view calendar” page):

**UPDATE:** This feature was not working properly for members rescheduling from one day/location to another day. Now this feature has been corrected to allow changes in the **SAME WEEK ONLY!**

When you reschedule a single delivery, your next scheduled delivery location will be changed, but then returns to your permanent location the following week. You may use

this option to change your pick up location as many times as you need. You can see these changes reflected on your calendar. The green boxes indicate your scheduled pick up date. Click each date to see the location details.

Your current pick up location and date are displayed at the top of the page “See what’s in my box/view calendar”

**Delivery: Summer CSA Share 2021/ Box**  
Jun 04, 2021  
Pickup at: Tantara Farm - Fri [Drop Details] [Modify Subscription]

Hold Delivery Next week >

**Subscription**  
Summer CSA Share 2021/Box  
Next Week >

**Subscription Details**

**Reschedule Single Delivery**  
Change the drop-off site and/or weekday for this week's delivery.  
**Note:** To permanently change this subscription's drop and delivery date, use your "CSA Subscription" page.

**Delivery Calendar**  
June 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

selected date scheduled box  
on hold canceled  
farm vacation delivered

Box Notes: (admin)

Notice the legend below the calendar gives you an explanation for each color. Green is the current schedule for your Summer CSA. Look at the top of the page to verify your pick up location and date.

NEW: Please look for a green box to indicate a correctly scheduled box.

Look for green boxes to verify that the rescheduling process was completed properly:

**Summer CSA Share 2021 / Box**

Subscription ID: #231009

Pick-Up at: Tantre Farm - Wed

On: Wednesdays

Frequency: Weekly

Share Size: Box

First Delivery: Week 22 of 2021 - 06/02/2021

Payment: Pre-paid boxes remaining: 12  
Last paid on 06/15/2021 by direct credit.  
Authorized for COD payment. (on or after delivery)

Save Changes

**Delivery Calendar**

August 2021

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31 1 2 3 4

5 6 7 8 9 10 11

selected date scheduled box  
on hold canceled  
farm vacation delivered

The circled box is on hold as usual:

Regularly scheduled box

Rescheduled box

Payment History for Subscription Renewals

date	order	amount	weeks	paid by
06/15/2021	-none-	\$0.00	15	

★ New ✓ Confirmed/Delivered ✗ Canceled 🔄 Refunded ⚙ Automatic Order

powered by CSAware  
a service of localharvest.org

Our Contact Info  
Phone: 734-475-4323  
Mail: 2510 Hayes Road  
Chelsea, MI 48118

If the calendar shows a striped box as below, there was an error with rescheduling, please contact us:

August 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

selected date

scheduled box

## Deadlines

Please make all changes for changed pick up locations or holds for each week **BEFORE SUNDAYS AT MIDNIGHT**. If you must make a last minute change or have an emergency that prevents you from picking up your box at the designated location/time after the deadline passes, please contact us immediately!

## Vacation Holds

If you are going on vacation, cannot reschedule pick up for another day, or need to miss a pick up for any reason, you have three options:

1. **Have Someone Else Pick Up Your Share:** Please instruct them to use your name at pick up and share the details of your pick up location outlined in “Drop Point Details”. Make sure to give them the farm’s phone number or email address if they have a last minute change and can’t pick up the share. If you choose this option, no action is needed on your dashboard or otherwise.
2. **Use Your Dashboard To Place A Hold On Your Delivery:** Go to “See what’s in my box/view calendar” or use the “Place box on hold for a week” option under “My Subscriptions” on the dashboard. Click the button “Hold Delivery”:

The screenshot shows the user's dashboard for 'Delivery: Summer CSA Share 2021 / Box'. The main content area displays the subscription details, including the pickup location 'Chelsea Farmers Market' and a 'Hold Delivery' button highlighted with a red box. The button is labeled '2 Hold Delivery' and 'Next week >'. Below this, there is a 'Subscription' section showing 'Summer CSA Share 2021/Box' and a 'Next Week >' button. At the bottom, there is a 'Reschedule Single Delivery' button. On the right side, there is a 'Delivery Calendar' for June 2021. The calendar shows dates from 30 to 10, with the 5th highlighted in red. Below the calendar, there is a legend for the calendar colors: 'selected date' (red), 'scheduled box on hold' (gray), 'farm vacation' (purple), 'canceled' (pink), and 'delivered' (green). At the bottom right, there is a 'Box Notes: (admin)' section.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

selected date scheduled box  
on hold canceled  
farm vacation delivered

Box Notes: (admin)

This hold will apply to the date you have selected on the calendar. This date will turn gray when it is “on hold” as seen below. You will see the red “Hold” message under your subscription.



**Delivery: Summer CSA Share 2021 / Box**  
 Jun 05, 2021  
 Pickup at: Chelsea Farmers Market [ Drop Details ] [ Modify Subscription ]

Get Delivery Next week >

**Subscription**  
 Summer CSA Share 2021/Box **Hold** Next Week

Subscription Details

Reschedule Single Delivery  
 Change the drop-off site and/or weekday for this week's delivery.

**Delivery Calendar**

June 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

selected date scheduled box  
 on hold canceled  
 farm vacation delivered

Box Notes: (admin)

Choose "Hold Delivery" if you are unable to pick up your share that particular week.

3. **You may choose to donate your share.** When you use the “Hold” option you can click the “Donate” button:

**Delivery: Summer CSA Share 2021 / Box**  
 Jun 05, 2021  
 Pickup at: Chelsea Farmers Market [ Drop Details ] [ Modify Subscription ]

Hold Delivery Next week >

**Subscription**  
 Summer CSA Share 2021/Box

Subscription Details

Reschedule Single Delivery

**Delivery Calendar**

June 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

selected date scheduled box  
 on hold canceled  
 farm vacation delivered

Box Notes: (admin)

How should we handle this held delivery?  
 3 Donate Hold Cancel

All unclaimed and donated shares are given to needy families at Tantré Farm’s discretion.

## Undo hold:

After a hold is placed, you will notice the “Hold Delivery” button changes to “Get Delivery”. Use this button to reinstate your regularly scheduled delivery, if you have changed your mind for some reason. Please make all changes before Sunday at midnight for the upcoming week.

The screenshot shows a user interface for a CSA share delivery service. The top navigation bar is orange and contains links for 'My Account', 'Next Delivery', 'Log Out', and a shopping cart icon. A search bar is also present. The left sidebar is yellow and contains links for 'Dashboard', 'Storefront', 'Order History', and 'Contact Us'. The main content area is white and displays the following information:

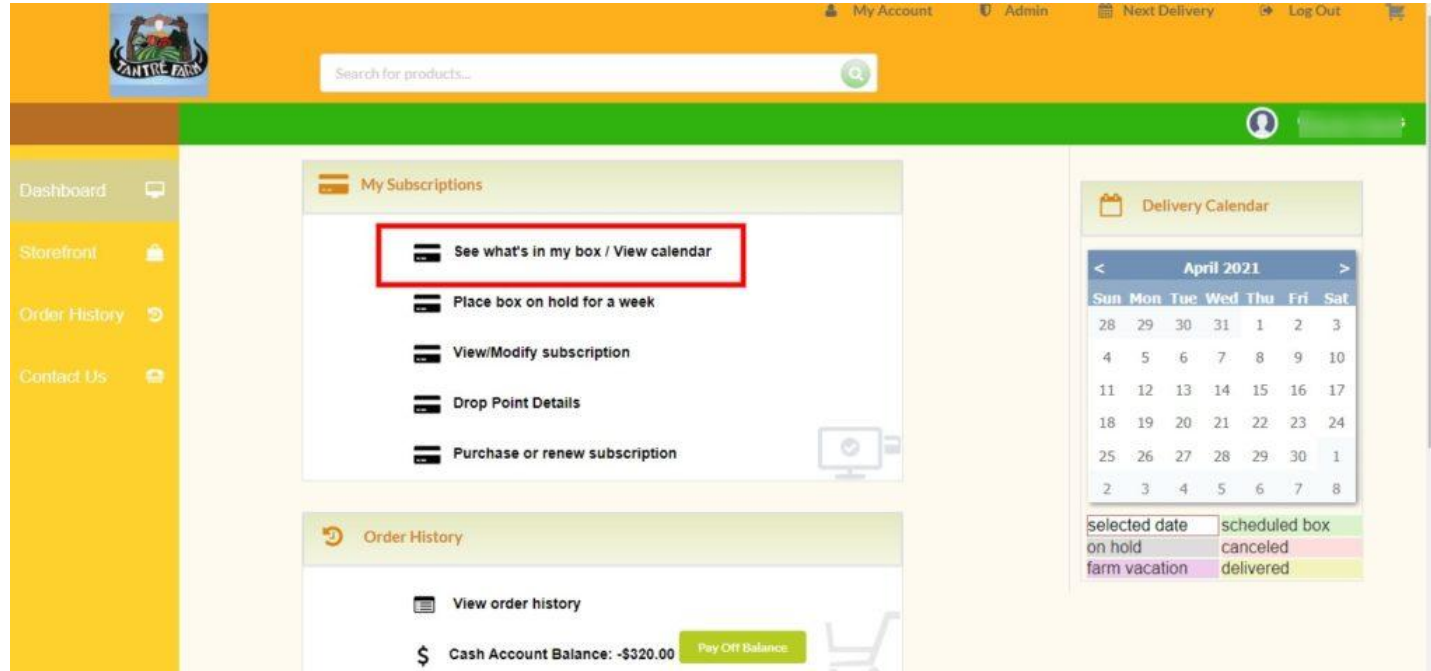
- Delivery: Summer CSA Share 2021 / Box**
- Jun 05, 2021**
- Pickup at: Chelsea Farmers Market**
- Drop Details** and **[ Modify Subscription ]** buttons
- Get Delivery** button (highlighted with a red box and an arrow pointing to it with the text 'undo hold')
- Next week >** button
- Subscription** section with the text 'Summer CSA Share 2021/Box' and a large red 'Hold' watermark.
- Next Week >** button
- Subscription Details** section
- Reschedule Single Delivery** section with the text 'Change the drop-off site and/or weekday for this week's delivery.'

On the right side, there is a **Delivery Calendar** for June 2021. The calendar shows dates from 30 to 10. The date 5 is highlighted in red. Below the calendar, there is a legend for the delivery status:

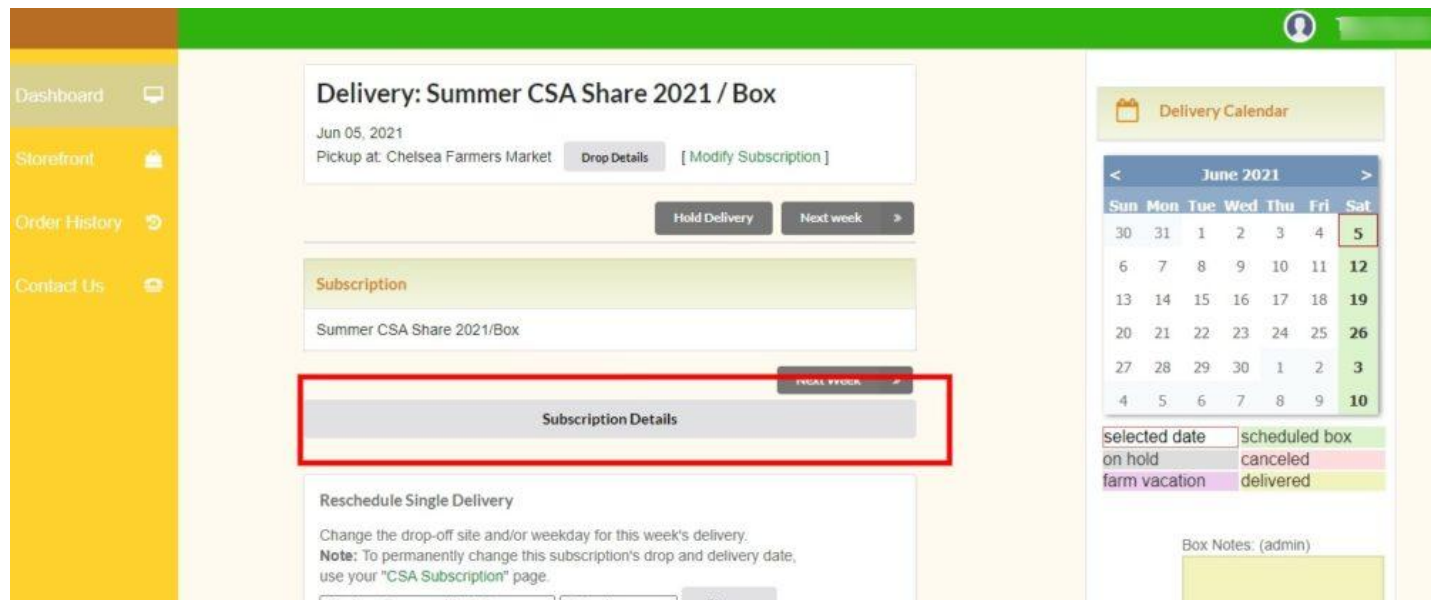
selected date	scheduled box
on hold	canceled
farm vacation	delivered

At the bottom right, there is a link for 'See Notes (admin)'.

# Subscription Details



Your Dashboard allows you to view your box details, place holds, modify your subscription or drop point details. Please see the [Dashboard](#) section for more details on each section.



When you choose "See what's in my box" on your dashboard, you can view your subscription details.