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myCSA by Canon Solutions America, Inc. provides a simple and convenient solution to managing your devices. The secure account management portal is a self-service utility available 24 hours a day, 7 days a week that provides an efficient way to handle day-to-day functions.

Upon enrollment, you can take advantage of the many features of myCSA such as submitting meter reads, placing service requests, ordering contracted supplies, and retrieving account information. This flexibility and control provides tremendous value.
LOGGING IN

To login to the myCSA Secure Account Management portal (myCSA), enter your username and password into the form found on the homepage. If you do not currently have a login then you will need to create a new user account. Click CREATE ACCOUNT to register.

Forgot Password

Forget your password? Not a problem. Simply click the ‘Forgot Password?’ link, fill out the form, and then click RESET PASSWORD.

FIRST TIME REGISTRATION

Registering for a myCSA account is quick and easy. Simply click CREATE ACCOUNT on the login screen to get started. Make sure that you have a valid Serial/Equipment number for a device that you currently manage (You can add more devices after you register).

Access Type

myCSA provides two types of user access: Quick Access (Business User) and Administrator Access (Business Admin).

- Quick Access gives users features such as device management, submitting meter reads, ordering supplies and placing service requests.
- Administrator Access gives users all basic functions as well as full access to myCSA allowing them to pay invoices, manage users and more.*

*Please note that this level of access requires additional approval.
**GETTING STARTED**

Once your registration has been approved, you will receive an email notification with your user name and a temporary password. When logging in for the first time, you will be prompted to change your temporary password. Once you have completed the login process, the Home Page will appear.

On the left-hand side of the page, you will see Menu options. Simply click on the menu heading to expand the options available.

**SETTING PREFERENCES**

Under Preferences you may update your phone number, change your password and manage notifications that you will receive from myCSA.

1. Click on the Preferences link in the top right menu.
2. Update your preferences as needed and click **Save Changes** when finished.

**FEEDBACK FORM**

The Feedback form is available on all pages, allowing you to quickly notify myCSA Secure Account Management support of any interface-related issues you come across. For all other issues, please use the Account Support page under Account Management.

1. Click on the Feedback link in the top right menu to view the form. (The page you are on is automatically selected).
2. Fill out the Feedback/Comments field and click **Submit** when you are finished.
CONTACT US

At the top of every page you will find a link to the Contact Us form which you can use to submit any general inquiries that you may have. Contact requests can be submitted to either the myCSA Customer Support team or the Business Administrator that manages your account.

1. Click the Send To dropdown and choose the recipient of the contact request:
   • Canon Solutions America Customer Support
   • Contact An Administrator Within Your Company
2. Use the Serial Number field if your request involves a specific device.
3. Enter the topic of your request in the Subject field.
4. Enter your message in the Description field.
5. Once you’ve completed your message, click Submit to send the request. You will receive a confirmation notice that your request has been submitted. Requests to Customer Support are handled within one business day.
The myCSA Secure Account Management dashboard provides you with an overview of usage associated to the devices registered to you. Depending on your user role, it also allows you to quickly access overall customer account-related information such as the device fleet, invoicing, orders and service requests.

**Usage Information**

The usage information described below is for assigned devices only.

- Average B&W Copies - Current average number of black & white copies based on previous two meter reads.
- Average Color Copies - Current average number of color copies based on previous two meter reads.
- Total Assigned Devices - Total number of devices registered to you.
- Average Uptime - Average up time for all machines assigned to you that are in working order (not down or serviced).

**Customer Account Information**

- My Devices - List of devices in your fleet that are assigned to you.
- Open Invoices - All open invoices that are available to view for your company's account.
- Open Orders - All orders currently in process for your company's account.
- Open Service Requests - All pending service requests not yet completed for your company's account.
MANAGING YOUR DEVICES

My Devices
The My Devices page lists all devices that are assigned to the user currently logged in. From this page, you may assign additional devices, remove devices, update notes, and perform most frequent actions (Order Supplies, Request Service, Enter Meter Reads).

Assigning Devices
1. From the Account Management menu, select My Devices.
2. Click Assign Device.
   All Account Devices not currently assigned to you will be displayed.
3. You may reduce the results using one of the search fields and click Search. It is recommended to perform a search by serial number.
4. Select the device(s) you would like to manage and click Submit. If the device is not displayed, you may have to request the device be added to the account. Refer to the Request Devices instructions.
   You may also populate the Note 1 and Note 2 fields. These fields are managed by you and may include information such as location of equipment.
5. Once you click Submit, the My Devices page will be displayed.

Tip

Note 1 & 2
The Note 1 & 2 fields are managed by you and may include information such as location of equipment. The information populated is specific to the device and will be visible to all account users.
1. Populate the fields. Information will be saved automatically when you tab out of the field.

Action Buttons
You may perform actions for a device directly from My Devices.
1. Order Supplies
2. Request Service
3. Enter Meter Reads
4. Remove Device
Removing a Device
If you no longer wish to manage a device, you may remove the device from your assigned serial numbers. Once a device is removed from your assigned serial numbers, you will no longer receive notifications for meter readings or be able to place supply orders for the device.

Note: This will not cancel any active maintenance contract and the device will still be available under Account Devices.

1. Click under Actions for applicable device.

Request Devices
If a machine is not displayed on the Account Devices page or when attempting to Assign Devices, you may request the device be added.

1. From the Account Devices page or Assign Devices page, click Request Devices.

2. Enter the serial number for the desired device and click Validate.

3. If the serial number is successfully verified, the model and install location will be displayed. Validate this is the correct information and click Submit.

A request will be sent to the myCSA Web Administrator for review.

If you receive a message stating that the serial number requested can be found in your Account Equipment, please refer to steps for Assigning Devices to add the serial number to My Devices.
METER READINGS

Submit Meter Reads
The Submit Meter Reads page will display devices assigned to the user account that are within five (5) days of the scheduled due date for a meter read. You may search for a specific serial number or view all devices that are due.

1. From the Meter Readings menu, select Submit Meter Reads.
2. Enter the meter read(s) for the applicable device(s) displayed.
3. Once all meter reads have been populated, click Submit.
   • If the meter read was submitted successfully, the device will be removed from the view.
   • If you receive a warning, please validate the accuracy of the meter read and click Submit again. Upon successful submission, the device will be removed from the view.
   • If you receive an error message, please validate the accuracy of the meter read and click Submit again. If you continue to receive an error, you may submit a meter read correction by clicking on the Edit button. Refer to the Account Support instructions.

Download/Upload Meter Reads
Do you have meter reads to submit for multiple devices? Use the Download Meters/Upload Meters function to submit your meter reads via spreadsheet. Download the preformatted spreadsheet, fill in your meter reads, and Upload the file. Once the Upload has completed, you will receive a confirmation indicating if the meter reads were successfully captured or if some of the meter reads require your attention.

1. From the Submit Meter Reads page, click Download Meters. The Canon Pending Meters Report spreadsheet will download.
2. Open the file and enter the meter reads in the white fields.
   Depending on your version of Excel, you may have to unprotect the spreadsheet. Do not modify the format of the spreadsheet.
3. Complete and Save the spreadsheet.
4. From the Submit Meter Reads page, click Upload Meters. A window will open.
5. Click Choose File, select the file and then click Upload.
   Once the Upload has completed, you will receive a notification.
**Meter Read History**

On the Meter Read History page, you may view meter read history for your assigned devices. Additionally, you may submit a meter read correction for the last usage invoice on a device.

1. From the Meter Readings menu, select Meter Read History.

![Meter Read History](image1)

2. To view the meter history for a specific device, click on the Serial Number. A new window will open displaying the meter read history since the start of the contract.

3. To download a device's meter read history, click on a serial number to view the device's meter read history and click **Download**. The meter read history will download to an Excel spreadsheet.

4. To correct the meter reads on the last usage invoice, click the plus sign. The usage invoice details from the last invoice will be displayed.

   Note: You may also submit a meter read correction from the Account Support page.

5. Select the check box next to the Invoice Number.

6. Fill in the Read Date, Total Read/BW Read and any comments you would like to include regarding the correction. Click **Submit**.

   ![Invoice Details](image2)

7. Upon successful submission, a confirmation number will be displayed. Please use this number for future reference.

   ![Confirmation Number](image3)

**Download Full Meter Read History**

Download meter read history for all devices from the previous two years.
PRODUCTS & SUPPLIES

In the Products & Supplies section, you may order supplies for devices covered under a supply inclusive maintenance agreement, view open/closed supply orders, submit an inquiry for one of Canon Solutions America product offerings, and view all orders (supply and equipment).

Contracted Supplies

1. From the Products & Supplies menu, select Order Contract Supplies.
2. A list of devices currently assigned to you will be displayed.
   Note: The device must be assigned to you under My Devices and have an active supply inclusive contract agreement to order supplies. Refer to the Assigning Devices instructions.
3. Locate the device for which supplies are being ordered.
4. Click on the Serial Number to begin the order process.
   Note: If Auto Toner Flag is ENABLED and you still need to order toner, please call our Customer Service Department at 1-800-613-2228 for assistance.
5. Select quantity from the drop-down menu and click Add To Cart.
   Note: The quantity listed is based on a one-month supply of toner.
6. After clicking **Add to Cart**, the Shopping Cart will be displayed.
   - To remove an item from the cart, click the **X** next to the item.
   - To revise the quantity, select from the list.
   - To empty the cart, click the **Delete Cart** button.

7. You will be prompted for a meter read if the last meter read on file is within 11 days prior to the current date. Meter Read fields will appear in yellow if required.

8. If you need to order supplies for additional devices, click the **Add More** button. To continue with the order, click the **Enter Shipping/Billing Information** button.
9. Enter your Billing/Shipping information.

10. The install location of the first machine selected will be displayed in the Ship To field. Click the Change Ship To link to change the ship to location for the entire order.

   Note: If the supplies need to be shipped to multiple addresses, please create separate orders.

11. The Shipping Method will default to standard ground shipping. If you require expedited shipping, contact Customer Service at 800-613-2228.

12. In the Attn Label field enter First Name, Last Name and Phone Number to ensure prompt delivery of your supplies.

13. Click Checkout.

   The Review and Place Order page will appear.

14. Review the order for accuracy.

   • If you need to revise the order, click Edit Order.
   • If you are ready to complete the order, click Place Order.

15. Upon successful submission of the order a confirmation message will appear and an email with the order number will be sent to you, which you should retain for your records.
Other Canon Products
Purchase additional products for your business including cameras, lenses, printers, ink, paper and more.

Note: Products purchased are billed to your company and invoiced as such.

1. From the Product & Supplies menu, click Other Canon Products.

2. You can browse available products by using the following options: Shop Best Sellers, Search and Categories.

Use the Sort dropdown to change the order of products displayed.
3. To learn more about a product, click either the More link or the Buy button.

4. From the pop-up, you can purchase the product by clicking the Add to Cart button or go directly to your cart and complete the order by clicking the Checkout button.

You can also view your cart and/or checkout from the homepage by clicking the links in the top right.

5. Review your cart before completing your order. To add more products, click the Continue Shopping button. When you're ready to place your order, click the Checkout button.
6. Choose where you want to ship your order. Click **Existing Address** to choose from a list of addresses or enter a new address by clicking **Create New Address**.

7. If your billing address is the same as your shipping address, leave the checkbox filled. If it's different, uncheck the box and choose either **Existing Address** or **Create New Address**.

8. Click **Confirm Request** to place your order or click the **Back** button if you need to make any changes.

9. Once your order is placed you'll see a confirmation screen with a Request Number which you'll need if you have any issues regarding your order. This number will also be in the order confirmation email.

10. When your order has shipped, we will send you a shipment confirmation email with tracking details.

11. For questions regarding your order or if you need to make a return, please have your **order request number** available and call 1-855-355-2365 or email us at mycsa@csa.canon.com (include your order request number in the email).

For questions regarding product information and support, please visit [https://www.usa.canon.com/support](https://www.usa.canon.com/support).
Open/Closed Supply Orders
Once your order has been accepted, the order details will be available on the Open Supply Requests page for orders that have not closed and Closed Supply Requests for orders that have closed. Tracking Information and Invoice information will be available once the order has shipped.

1. From the Product & Supplies menu, select Open Supply Requests or Closed Supply Requests.
2. Orders that have been created within the last 30 days under the user currently logged in will be displayed.
3. Using the search fields, you may search by Related Party Accounts, Request Number, Serial/Equipment Number, Model or for Orders Placed within 30 days - 18 months.

4. To view the Order Details, click the link under Order Information. If the order has been invoiced a link to the invoice will also be displayed.
5. Once the order has shipped, a link will be available for the tracking information. This will also be available on the Order Details page. The link will open the carrier’s website in a new window.

**Order Inquiry**

Once your order has been accepted, it may be tracked on the Order Inquiry page.

1. From the Product & Supplies menu, select Order Inquiry.

2. Using the search fields, you may search by Related Party Accounts, Order/Contract Number, Serial/Equipment Number or Purchase Order. You may also narrow your search by Order Status.

3. The search results will be displayed.

4. You can collapse the details for all orders by clicking on the in the column heading or collapse for individual orders by clicking on the next to the order line.
   - Tracking Information will be displayed if the order has shipped.
   - To view detailed order information, click Order Details.

**Tip**

You are able to view your signed documents if there is an electronic signature. If your document is available through myCSA, the Reference number will be a hyperlink. All documents are downloaded into a PDF.
AUTO TONER

Certain models of Canon equipment are capable of shipping toner automatically when the machine is low. Two fields have been added to the “Order Contract Supplies” screen to indicate if a machine is enrolled in Auto Toner and actively creating new supply orders.

The devices that are enrolled in the Auto Toner program send an alert to us via ImageWARE Remote (IWR) if a toner is low and we will ship toner automatically.

Auto Toner Information

Auto Toner information is visible to all myCSA users. If a user has a machine enrolled in the Auto Toner program and would like access to edit Auto Toner information, please contact us at myCSA@csa.canon.com to request assignment of the Auto Toner role.

To access Auto toner information, go to the Order Contracted Supplies page of myCSA. A new column has been added for Auto Toner Flag.

Auto Toner Legend

- **Auto Toner Enabled/Active** – Machine is enabled for Auto Toner and is actively reporting low toner alerts through imageWARE Remote. **Toner will ship automatically.**
- **Auto Toner Enabled/Inactive** – Machine is enabled for Auto Toner and is not actively reporting low toner alerts through imageWARE Remote. **Toner will not ship automatically.** Action needs to be taken to establish communication. See instructions for Communication test.
- **Auto Toner Not Enabled** – Machine is not enabled for Auto Toner and is not actively reporting low toner alerts through imageWARE Remote. **Toner will not ship automatically.**
- **Auto Toner Not Eligible** – ImageWARE Remote is not in an eligible status for Auto Toner. **Toner will not ship automatically.**
* In order to perform a **Communication Test**, please confirm your machine is turned on and connected to your network.

Take the following steps to perform a Communication Test and reestablish a communication:

1. Press **Counter Check** or **123** button on machine
2. Press **Monitoring Services** button on screen
3. Press **Communication Test** button on screen
4. Press **Start Test** button on screen

   • If Communication Test was successful, your machine is now communicating and toner will ship when the machine is low on toner
   • If Communication Test was unsuccessful, please contact your IT department and have them confirm the following imageWARE Remote criteria can be met:
     ◦ Secure Port 443 is open
     ◦ The following URLs are not blocked from outbound internet communication:

<table>
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<tr>
<th>URL</th>
<th>IP Address</th>
<th>Supported Encryption Hash</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://a01.ugwdevice.net/ugw/agentif0101">https://a01.ugwdevice.net/ugw/agentif0101</a></td>
<td>202.248.100.72</td>
<td>SHA-1 compliant</td>
</tr>
<tr>
<td><a href="https://b01.ugwdevice.net/ugw/agentif0101">https://b01.ugwdevice.net/ugw/agentif0101</a></td>
<td>202.248.100.75</td>
<td>SHA-2 compliant</td>
</tr>
</tbody>
</table>

Failure to reestablish communication could result in running out of toner. If you have any questions, call our Customer Service department at 800-447-0772.

**Auto Toner Program Details**

Auto Toner program details are available when a user clicks on the **Auto Toner Flag** next to the serial number. This pop-up window allows the user to see the details of the device, including the last order that was placed for this device and the ability to view all supply order history for this serial number.

The pop-up also gives the user details about the auto toner flag and status as well as a sample shipping label based on auto toner information populated.
Users With Auto Toner Role

Users who have been assigned the Auto Toner role can edit contact and shipping information via the Edit Details button, as well as add devices to the program.

Tip: To ensure all of the information you need gets printed on your Shipping Label, please limit to 20 characters for the Attention Line. We have included a Shipping Label Character Counter for your convenience. Please note that the serial number will print on the Shipping Label automatically (refer to sample shipping label).

Add Devices

If the device is eligible for Auto Toner, but has not been set up, the user has the ability to sign up for the Auto Toner program via the “Request to enable this device with the Auto Toner program” button

1. For a single device – Click on the Auto Toner Flag link next to the corresponding serial number and complete the form on the pop-up window. Please allow 24 hours for processing.

2. For multiple devices – Download and complete the template on either the pop-up window of a corresponding serial number or the Auto Toner Request button in the top right corner of the page and upload. Please allow 24 hours for processing.

Please note: Information can be added or changed, but not deleted. If you receive an error when uploading spreadsheet, open file, click on the Error tab to view the error to correct, update original spreadsheet, upload again.

To preview the shipping label and additional details about the Auto Toner program, visit the Device Detail page via the My Device page. A new tab has been added to the device detail page that allows the users to view the status of the auto toner program along with a sample of the shipping label. Users also have the ability to edit the Auto Toner details for the serial number.

The Device Status section shows the imageWARE remote status and the last communication date. The Device History section shows the Supply History for that particular device.

This information can also be viewed on Account Devices > Export to Excel.
Request Service

Service calls may be placed for devices whether or not they are covered under an active maintenance agreement. If the machine is not covered under an active maintenance agreement, you will be notified of our current service rates.

1. From the Service menu, select Request Service.
   A list of devices currently assigned to you will be displayed.
   Note: If the device is not assigned to your user account, you can perform a search to locate the device.
   It is recommended that you use only one search criteria (i.e. Serial Number, Install Location or Related Party Accounts).

2. Locate the device for which service is being requested.

3. Click on the Serial Number to begin the service request process.
   The Service Request page will be displayed.

4. In the Device Information section, confirm if you would like to select a different Install Location. If Yes is selected, an additional field will open to select a different install location.

5. If the device is not covered under an active maintenance agreement, the Billing Information section will be displayed.
6. In the Contact Information section, the Contact Name, Contact Phone, and Business Hours will default but may be revised.
7. Complete the Room/Floor/Suite field.

![Contact Information]

8. In the Service Request Information section, select the Problem Summary and Problem Description, and include optional notes in Additional Instructions.

![Service Request Information]

9. Click **Continue**. The Service Request Review Page will be displayed.
10. Click **Change** to revise the request or **Submit** to continue.

![Confirm Service Request]

11. Upon successful submission of the service request, a confirmation email will be sent to you with the service request number for your records.

![Confirm Service Request]

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Open Service Requests
You can view open service requests by visiting Open Service Requests under the Service menu. Information such as serial number, creation date, and type of request will be displayed. If you need assistance with your service request, please call our Service Department at 1-800-355-1390.

1. From the Service menu, select Open Service Requests.
   Using the search fields, you may search for requests made within 30 days - 18 months by Request Number, Serial/Equipment Number, Requestor or Account Number.

2. You may cancel a service request if it has not yet been assigned to a technician. Click the Cancel Request link. If the service request is beyond the point where it can be cancelled, a message will be displayed.

Closed Service Requests
You can view closed or cancelled service requests by visiting Service Request History under the Service menu. Information such as serial number, date closed, and problem summary will be displayed. If you need assistance with your service request, please call our Service Department at 1-800-355-1390.

1. From the Service menu, select Closed Service Requests.
   Using the search fields, you may search for requests made within 30 days - 18 months by Request Number, Serial/Equipment Number, Requestor or Account Number.
INVOICE INQUIRY AND PAYMENTS

With additional access, you may view and pay invoices billed directly from Canon Solutions America. You will continue to receive your invoice using your current delivery method, but may also view the invoices in myCSA. Additionally, you may also view Canon Financial Service invoices if invoiced through CFS. If you require access and the Invoice & Payment menu does not appear in your application, please contact us at 855-355-2365.

Invoice Inquiry - Canon Solutions America Invoices

1. From the Invoice & Payment menu, select Invoice Inquiry.
2. Complete the applicable search fields and click Search.
   A list of invoices matching your search criteria will be displayed.
3. To download an invoice to a portable document format (pdf), click on the applicable Invoice Number.
4. To pay an invoice, select the Invoice and click on Pay Invoice.
   Note: The Pay Invoice button will not appear until an invoice is selected.

Make Payment - Canon Solutions America Invoices

The Make Payment page will display all open invoices by default. You may submit a credit card payment for open invoices on your account.

1. From the Invoice & Payment menu, click Make Payment. A list of open invoices will be displayed.
   The Make Payment Page will open and the Payment Amount field will be prefilled with the remaining balance on the Invoice.
2. Select the invoice(s) to be paid and click Pay Invoice.
   Note: The Pay Invoice button will not appear until an invoice is selected.
3. You may submit payment for the remaining balance or type in a different amount for a partial payment. Click on Enter Credit Card and a new window will appear.

4. Enter your Credit Card number, Expiration Month and Year. Click Continue.
5. Upon successful submission, a message will be displayed indicating that the credit card details have been captured.
6. Click Ok.
7. You will be returned to the Make Payment page. Click **Submit Payment** to submit the credit card payment.
8. Upon successful submission, a confirmation number will be displayed. Please use this number for future reference.

![Make Payment]

**Invoice Inquiry - Canon Financial Services Invoices**

With additional access, you may also view Canon Financial Services invoices if invoiced through CFS. If you require access to the CFS invoices and it does not appear in your application, please contact us at 855-355-2365.

1. From the Invoice & Payment menu, select **CFS Invoice**.
2. Complete the applicable search fields and click **Search**. A list of invoices matching your search criteria will be displayed.
3. To download an invoice to a portable document format (pdf), click on the applicable **Invoice Number**. The Invoice Number will appear as a link if a pdf format is available.
   **Note:** Invoice Payment is not available for Canon Financial Services Invoices at this time.

![CFS Invoice]

**Contract Billing Reports**

With additional access, you may view Contract Billing Reports. The reports contain billing information billed directly to the customer by Canon Solutions America, Inc. The reports will not contain billing information from Canon Financial Services.

1. Click **Download Last Month's Billing** to view billing information for the prior month.
2. Click **Download All Contract Billing** to view billing information for associated account number.
3. Create a custom report by entering in parameters for a date range, a specific contract or serial number, for example.
ACCOUNT MANAGEMENT

Account Devices
The Account Devices page lists all devices that are associated with your account. This includes devices not covered under an active service contract with Canon Solutions America.

1. From the Account Management menu, click Account Devices.
   All devices associated with the Account will be displayed.
2. Click the plus sign to display Note 1 & Note 2 information.

Account Support
You may submit inquiries or report changes to your account on the Account Support page. This may include a correction to meter reads or change of address, for example.

1. From the Account Management menu, select Account Support.
2. Enter associated serial number.
3. Select the type of inquiry and complete the required fields.
4. Include any additional information in the Comment field.
5. Click Submit.

6. Upon successful submission, a confirmation number will be displayed. Please use this number for future reference.
USER REGISTRATION

Registration Options
The User Registration section is available to the Business Administrator (BA) on the account. This section contains multiple options to register new users and to manage existing users.

• By Single Machine - To register a single user to a device(s).
• By Model - To register a single user with grouping by model number.
• By Location - To register a single user with grouping by install location.
• By Notes - To register a single user with grouping by Note 1 & Note 2.
• Copy User - To register a single user by copying the devices & roles of an existing user.
• Mass Registration - To register multiple users (up to 50) via a spreadsheet.

Single User Registration
1. Select a single user registration option from the menu: By Single Machine, By Model, By Location, By Notes or Copy User.

2. Use the checkboxes to make your selection(s) or click Select All to choose all.
3. Complete the Create New User section with user information and designated roles.
4. Select ‘Yes’ or ‘No’ to ‘Automatically assign all future installations.’
   Note: If ‘Yes’ is selected, any machine installed under the account will automatically be assigned to the user regardless of where the machine is located or department.

5. Click Create User. A confirmation will display once process is complete.
Multi-User Registration

1. From the User Registration menu, select Mass Registration.
2. A list of users currently assigned to you as the Business Administrator will be displayed.
3. Download the registration form by clicking Download Template. Complete the form for up to 50 users and click Upload Registration. Once registration is submitted, the registered users will receive a confirmation email including a temporary password and user name.

User Management

Approved Business Administrators may manage users associated with the account. This includes updating contact information, assigning devices, and providing access to the various menus in myCSA.

1. From the User Registration menu, select User Management.
   If this option is not available, please contact myCSA Support at 855-355-2365.
2. A list of users currently assigned to you as the Business Administrator will be displayed.

Assign a Business User

To manage a user, the user must be assigned to the Business Administrator. Multiple users can be assigned to a Business Administrator, but a user may only be assigned to one Business Administrator.

1. From the User Management page, click on the second Filter By field and select All Business Users.
2. Select the users you would like to manage and click Assign User. Conversely, you can unassign a user by selecting the user and clicking Unassign User. Note: You will not be able to assign or unassign a user that is assigned to another Business Administrator.

Once you have completed your updates, change the Filter By field back to Your Assigned Business Users or select User Management from the Account Management menu.

Manage User Functions
To manage a user, the user must be assigned to the Business Administrator. Multiple users can be assigned to a Business Administrator, but a user may only be assigned to one Business Administrator.

1. To manage the access of a specific user, click on the email address of the user in your list of assigned users.
2. The user details will be displayed.
3. User access in myCSA may also be maintained on this screen. Here is a description of each Role.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNT</td>
<td>View My Devices, Account Devices &amp; Account Support - No Special Request</td>
<td>No Special Request option under Account Management</td>
</tr>
<tr>
<td></td>
<td>View My Devices, Account Devices &amp; Account Support</td>
<td>Special Request option under Account Management</td>
</tr>
<tr>
<td>PRODUCTS</td>
<td>Submit &amp; View Supply Orders, All Order Types</td>
<td>Ability to Submit Orders and view Open/Closed Orders for the account</td>
</tr>
<tr>
<td>INVOICE PAYMENT</td>
<td>View &amp; Pay CSA Invoices</td>
<td>Ability to View and Pay invoices by CSA</td>
</tr>
<tr>
<td></td>
<td>View &amp; Pay CSA Invoices, View CFS Invoices</td>
<td>Ability to View and Pay invoices by CSA and also View invoices by CFS</td>
</tr>
<tr>
<td></td>
<td>View CFS Invoices</td>
<td>View Only CFS invoices</td>
</tr>
<tr>
<td>SERVICE</td>
<td>Submit &amp; View Service Requests</td>
<td>Ability to Request Service and View Open/Closed Service Requests</td>
</tr>
<tr>
<td></td>
<td>View Service Requests</td>
<td>Ability to View Open/Closed Service Requests</td>
</tr>
<tr>
<td>METER READS</td>
<td>Submit &amp; View Meter History</td>
<td>Ability to Submit &amp; View Meter Read History for devices</td>
</tr>
</tbody>
</table>

4. Make necessary updates and click Submit.
Providing convenient, flexible web-based training on the myCSA portal and select Canon devices.

1. From the Helpful Tools menu, click **eLearning**.

2. Select the **myCSA** module.

3. The myCSA Overview video will be displayed. Click the play button to watch a quick overview of myCSA.
4. Click the **Go to Contents** button on the bottom left hand side underneath the video to view myCSA chapter-by-chapter in more detail.

   Note: You may have to scroll down in order to see the Go to Contents button.

5. Select **Using myCSA** if you need training on a specific section or you can view all lessons.
6. Use the table of contents to quickly jump to any of the available lessons.

7. Click the arrows on the right and left to select the lesson you want to view or select **Go To Contents** to view additional chapters.