

Quick Start Guide

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Terminal Login

Login Screen

All Users (Back Office and Terminal) log in at the [SimpleConsign Login Screen](#).

Log Into a Terminal

The terminal is used for day-to-day operations and is where most users will spend their time in SimpleConsign. You will need a Terminal for each workstation Cashiers log into.

Important Note: Once you log in, you only need to open a Terminal **IF** you are making sales. You do not need to open the Terminal when entering Consignment or Store Inventory

Only one computer can be logged into each Terminal at a time. Logging into a Terminal with an active user will kick out the user and not save their progress.

There are two ways to log into a Terminal:

- Log directly into a terminal from the main login screen.
- Log into the terminal via the Back Office.

Direct Login

There are three components to logging into the Terminal:

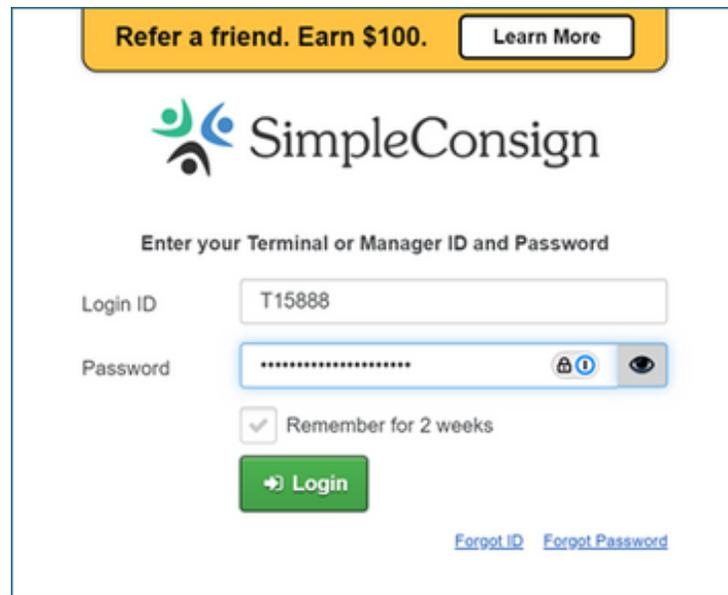
- Terminal Login ID - always starts with a T followed by 5 numbers.
- Terminal Password - set when the Terminal is created.
- User PIN - always a 4-digit number.

The Terminal Login ID and Terminal Password are shared among all users. Each user is assigned a unique PIN that should not be shared with other users.

For assistance with creating a Terminal please visit the [Create a Terminal](#) article.

Below is the login screen with sample login data for a Terminal. You can choose to either log into a Terminal or into Back Office based on the information you enter.

Once you have entered the Terminal Login ID and Password, click **Login**.



Refer a friend. Earn \$100. [Learn More](#)

 SimpleConsign

Enter your Terminal or Manager ID and Password

Login ID

Password  

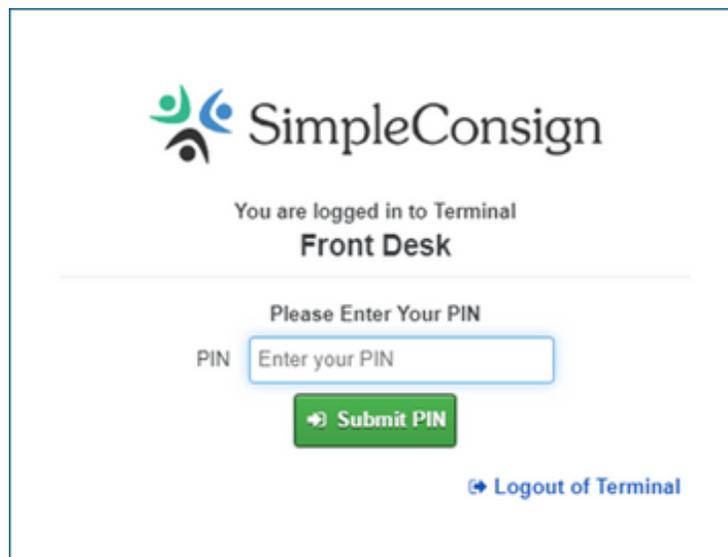
Remember for 2 weeks

[→ Login](#)

[Forgot ID](#) [Forgot Password](#)

You will then be prompted to enter your user PIN. Enter your PIN and click **Submit**. You will immediately be logged into the Terminal.

For assistance locating user PINs please visit the [User Tab in Back Office](#) article.



 SimpleConsign

You are logged in to Terminal
Front Desk

Please Enter Your PIN

PIN

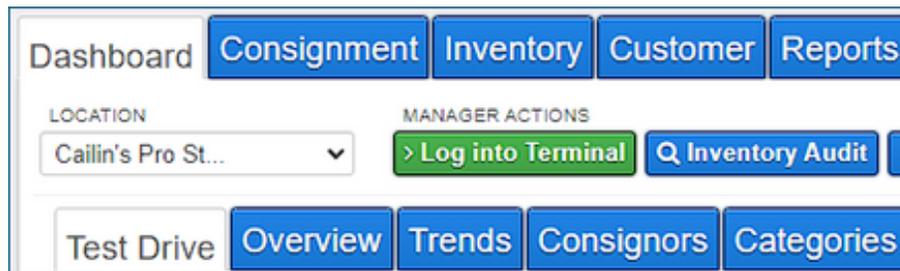
[→ Submit PIN](#)

[Logout of Terminal](#)

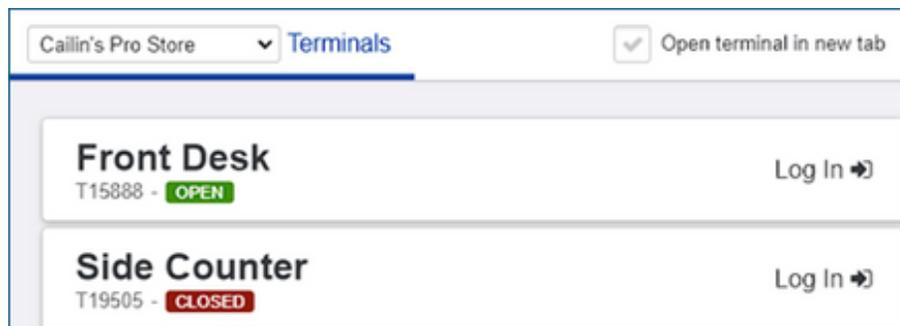
Terminal Login via Back Office

You can log into a Terminal through the Back Office **Dashboard** tab. First log into Back Office. then, click **Log into Terminal**.

If your store has multiple locations be sure the correct location is selected on the dropdown before logging into Terminals from Back Office. If you have the wrong one selected, you will ring up sales in the wrong location.



Then click the **Log In** next to the terminal you wish to log into.

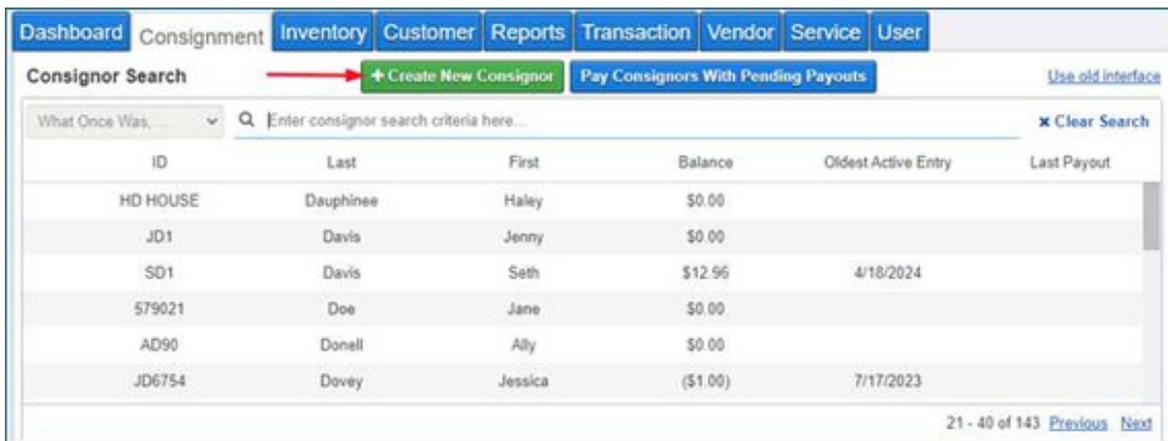


Consignment Tab

Adding a Consignor

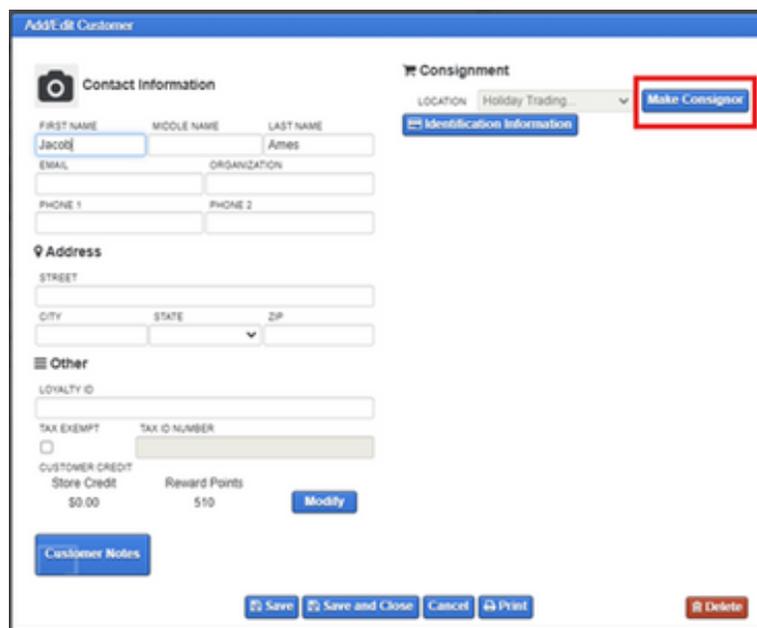
The **Consignment** tab can be accessed from both Back Office and Terminal.

When adding Consignors, it is important to search through the existing Consignor list to avoid creating duplicate accounts. To add a new Consignor, click **+Create New Consignor**.



ID	Last	First	Balance	Oldest Active Entry	Last Payout
HD HOUSE	Dauphinee	Haley	\$0.00		
JD1	Davis	Jenny	\$0.00		
SD1	Davis	Seth	\$12.96	4/18/2024	
579021	Doe	Jane	\$0.00		
AD90	Donell	Ally	\$0.00		
JD6754	Dovey	Jessica	(\$1.00)	7/17/2023	

If the new consignor has already been entered as a Customer, you can easily convert the customer profile on the **Customer** tab to a Consignor account by selecting **Make Consignor**.



Add/Edit Customer

Contact Information

FIRST NAME: Jacob | MIDDLE NAME: | LAST NAME: Ames
 EMAIL: | ORGANIZATION: |
 PHONE 1: | PHONE 2: |

Address

STREET: |
 CITY: | STATE: | ZIP: |

Other

LOYALTY ID: |
 TAX EXEMPT: | TAX ID NUMBER: |
 CUSTOMER CREDIT: Store Credit: \$0.00 | Reward Points: 510 | **Modify**

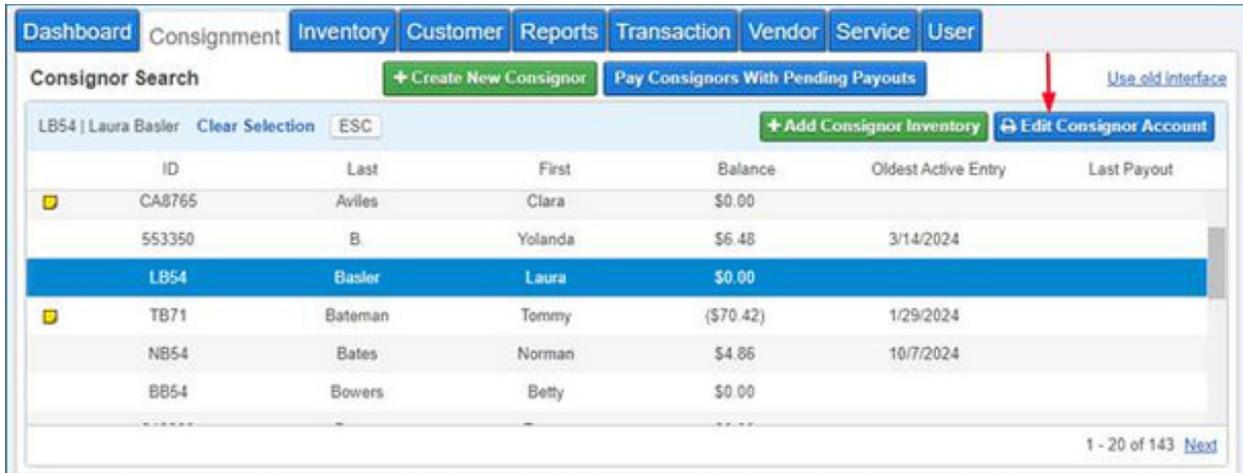
Consignment

LOCATION: Holiday Trading... | **Make Consignor**

Buttons: Save, Save and Close, Cancel, Print, Delete

Editing a Consignor

To update an existing consignor's details, simply select the consignor from the list and choose **Edit Consignor Account** or double-click on the name.



The screenshot shows the 'Consignor Search' interface. At the top, there are navigation tabs: Dashboard, Consignment, Inventory, Customer, Reports, Transaction, Vendor, Service, and User. Below the tabs, there are buttons for '+ Create New Consignor', 'Pay Consignors With Pending Payouts', and 'Use old interface'. A search bar contains 'LB54 | Laura Basler' and a 'Clear Selection' button. Below the search bar, there are buttons for '+ Add Consignor Inventory' and 'Edit Consignor Account'. A table lists consignors with columns for ID, Last, First, Balance, Oldest Active Entry, and Last Payout. The row for 'LB54 | Basler | Laura' is highlighted in blue. A red arrow points to the 'Edit Consignor Account' button.

ID	Last	First	Balance	Oldest Active Entry	Last Payout
CA8765	Aviles	Clara	\$0.00		
553350	B.	Yolanda	\$6.48	3/14/2024	
LB54	Basler	Laura	\$0.00		
TB71	Bateman	Tommy	(\$70.42)	1/29/2024	
NB54	Bates	Norman	\$4.86	10/7/2024	
BB54	Bowers	Betty	\$0.00		

1 - 20 of 143 [Next](#)

Contact Information

When adding or editing a consignors, a range of information can be recorded. These details are located on the left-hand side of the Add/Edit Consignor window under **Contact Information**. Each consignors is linked to a customer account. Please visit our [Create a Customer](#) article for more information.

Add/Edit Consignor

Contact information

FIRST NAME	MIDDLE NAME	LAST NAME
<input type="text" value="Tommy"/>	<input type="text"/>	<input type="text" value="Bateman"/>
EMAIL		ORGANIZATION
<input type="text" value="test@gmail.com"/>		<input type="text"/>
PHONE 1	PHONE 2	
<input type="text" value="675-987-6765"/>	<input type="text"/>	

Address

STREET		
<input type="text" value="56 Springlake Drive"/>		
CITY	STATE	ZIP
<input type="text" value="Wall"/>	<input type="text" value="NJ"/>	<input type="text" value="01771"/>

Other

LOYALTY ID	
<input type="text"/>	
TAX EXEMPT.	TAX ID NUMBER
<input type="checkbox"/>	<input type="text"/>
CUSTOMER CREDIT	
Store Credit	Reward Points
<input type="text" value="\$0.00"/>	<input type="text" value="7"/>

Consignment

CONSIGNOR ID	<input type="text" value="TB71"/>	<input type="button" value="Auto-Generate"/>
CONSIGNOR ACCESS	<input checked="" type="checkbox"/>	PAY BY CHECK: <input checked="" type="checkbox"/>
CONSIGNOR CONTRACT	- No Contract Selected - <input type="button" value="Print Contract"/>	

Default Percentage
60% from Location

Flat Split
Split is determined explicitly

Tiered Split
Split changes based on selling price

<input checked="" type="checkbox"/> Allowed to Add Inventory	<input checked="" type="checkbox"/> Allowed to Withdraw Inventory
<input checked="" type="checkbox"/> Allowed to Edit Inventory	<input checked="" type="checkbox"/> Allowed to Print Labels
<input checked="" type="checkbox"/> Inventory Added is Marked as "Do Not Discount"	

Consignor Fees & Discounts

MONTHLY FEE	FEE DAY OF MONTH	
<input type="text" value="100.00"/>	<input type="text" value="Last day of month"/>	
FEE DESCRIPTION		
<input type="text" value="Space 6"/>		
DISCOUNT %	DISCOUNT START	DISCOUNT END
<input type="text" value="25"/>	<input type="text" value="2/1/2024"/>	<input type="text" value="2/29/2024"/>

Actions

Password changed by user

Cannot delete consignor with existing items

6

Consignment

The details on the right-hand side of the Add/Edit Consignor window under **Consignment** pertain to the consignor account.

Add/Edit Consignor

Contact Information

FIRST NAME: Tommy, MIDDLE NAME: , LAST NAME: Bateman
 EMAIL: test@gmail.com, ORGANIZATION:
 PHONE 1: 675-987-6765, PHONE 2:
Address
 STREET: 56 Springlake Drive
 CITY: Wall, STATE: NJ, ZIP: 01771
Other
 LOYALTY ID:
 TAX EXEMPT: , TAX ID NUMBER:
 CUSTOMER CREDIT: Store Credit: \$0.00, Reward Points: 7 **Modify**
Customer Notes

Consignment

CONSIGNOR ID: TB71 **Auto-Generate**
 CONSIGNOR ACCESS: PAY BY CHECK:
 CONSIGNOR CONTRACT: - No Contract Selected - **Print Contract**
 Default Percentage: 60% from Location
 Flat Split: Split is determined explicitly
 Tiered Split: Split changes based on selling price
 Store Split %: 40
 Allowed to Add Inventory Allowed to Withdraw Inventory
 Allowed to Edit Inventory Allowed to Print Labels
 Inventory Added Is Marked as "Do Not Discount"
\$ Consignor Fees & Discounts
 MONTHLY FEE: 100.00, FEE DAY OF MONTH: Last day of month
 FEE DESCRIPTION: Space 6
 DISCOUNT: 25%, DISCOUNT START: 2/1/2024, DISCOUNT END: 2/29/2024
Actions
 Password changed by user
Send Consignor Access Invite
Log into Consignor Access
Bulk Update Inventory Splits
Identification Information
Save Save and Close Cancel Print
Cannot delete consignor with existing items

Consignor ID

This serves as the account number for the consignor. By default, the system will generate a 6-digit number for each consignor. These IDs can be manually changed as needed. Consignor IDs may include both letters and numbers.

Important Note: If **Sequential IDs** are enabled, this field will display **TBD** until you save the record and will not be editable.

Consignor Access

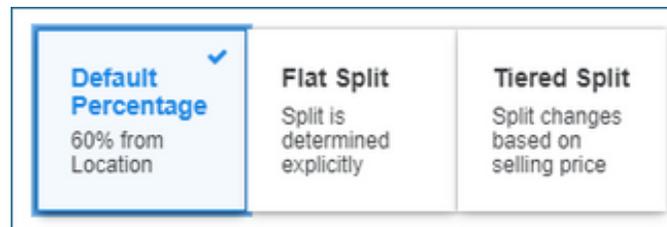
Consignor Access enables Consignors to manage their inventory and view sales history in one central location. Further details can be found in the [Consignor Access](#) article.

Consignor Contract

More information about this feature can be found in the [Consignor Contracts](#) article.

Splits

By default, the consignor's account will inherit the splits from the location settings. However, you can override these settings by selecting either the *Flat Split* or *Tiered Split* option for this consignor.



Note: Changes will only apply to newly added inventory. If you need to update the split for all available inventory, visit the [Refactor Consigned Item Splits](#) section.

Allowed to Add, Withdraw, and Edit Inventory

These options can be enabled in Back Office, Settings, and set for each consignor. View the [Consignor Access Setup](#) article for more information.

Inventory Added is Marked as "Do Not Discount"

When enabled, new inventory added for the consignor will be excluded from [automatic discounts](#). This setting can be adjusted on individual items.

\$ Consignor Fees & Discounts

Monthly Fee

The *Monthly Fee*, *Fee Day of Month*, and *Fee Description* fields allow you to charge consignors a recurring fee. This is commonly used for rental fees in antique/vendor mall settings but can also be applied to monthly membership fees at consignment stores.

Discount

The *Discount Percentage*, *Start Date*, and *End Date* fields enable you to apply specific discounts to this Consignor's inventory, often used in antique malls for vendors or dealers. Please refer to our [Discount Types](#) article for more details.

Credit Card Processing Fee

This option determines whether the Consignor will be charged a [fee for credit card processing](#), as configured in the credit card processing settings.

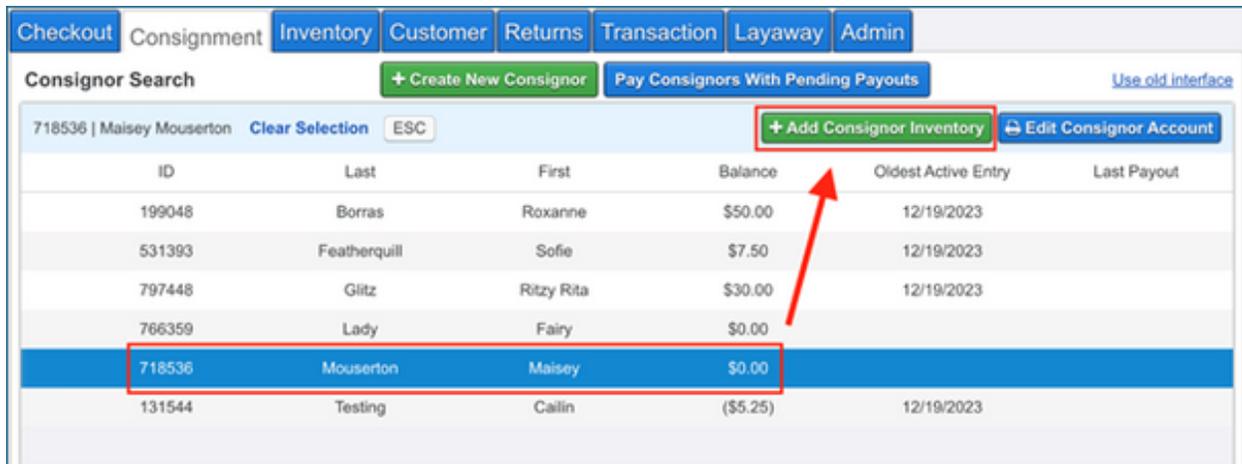
Bulk Update Inventory Splits

Use this feature to apply a new consignment split to all available items for this consignor. Please view our [Refactor Inventory Item Splits](#) article for further instructions.

Add Consignor Inventory

Choose a Consignor

On the **Consignment** tab select the desired consignor by clicking on their name then click + **Add Consignor Inventory**.



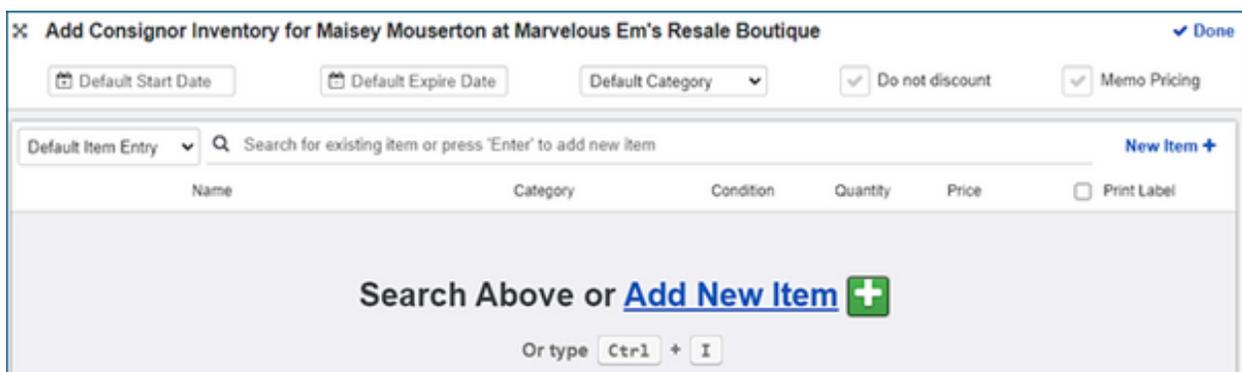
ID	Last	First	Balance	Oldest Active Entry	Last Payout
199048	Borras	Roxanne	\$50.00	12/19/2023	
531393	Featherquill	Sofie	\$7.50	12/19/2023	
797448	Glitz	Ritzzy Rita	\$30.00	12/19/2023	
766359	Lady	Fairy	\$0.00		
718536	Mouserlon	Maisey	\$0.00		
131544	Testing	Callin	(\$5.25)	12/19/2023	

Choose Defaults

This will open a window for entering consigned inventory for that specific consignor at the specific location.

Be sure to review the information at the top of the inventory entry window to ensure both the consignor and location are correct.

Before entering your first items check to see if any of the default options are appropriate for the inventory you are about to enter.



✕ Add Consignor Inventory for Maisey Mouserlon at Marvelous Em's Resale Boutique Done

Do not discount
 Memo Pricing

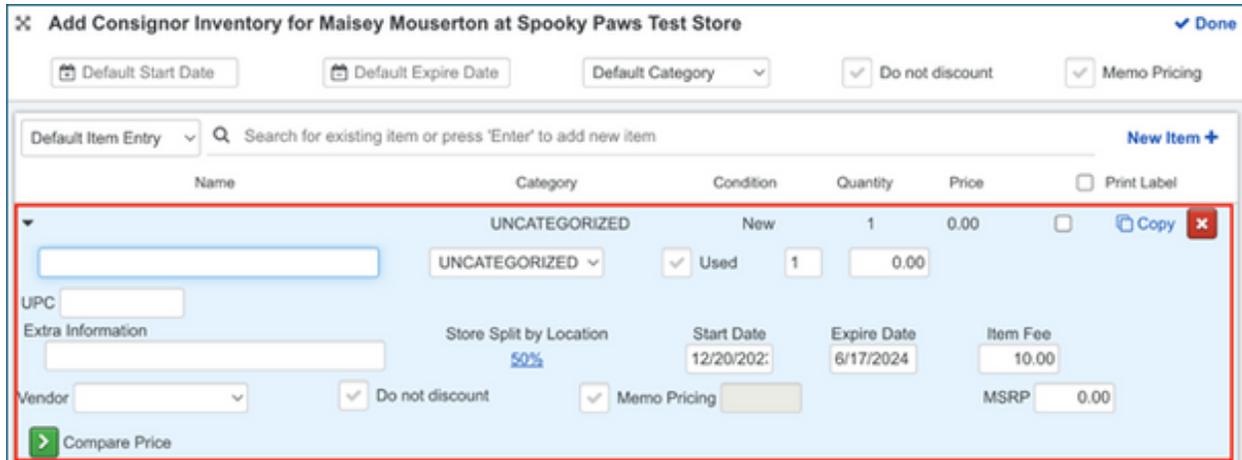
New Item +

Name	Category	Condition	Quantity	Price	<input type="checkbox"/> Print Label
Search Above or Add New Item +					

Or type +

Enter Inventory

When you are ready to enter inventory, you can click **New Item +**, use the keyboard shortcut **Ctrl + I**, or if you haven't moved your cursor from the search field – press **Enter**.



Add Consignor Inventory for Maisey Mouserton at Spooky Paws Test Store Done

Default Start Date Default Expire Date Default Category Do not discount Memo Pricing

Default Item Entry Search for existing item or press 'Enter' to add new item New Item +

Name	Category	Condition	Quantity	Price	<input type="checkbox"/> Print Label
	UNCATEGORIZED	New	1	0.00	<input type="checkbox"/> Copy X
<input type="text"/>	UNCATEGORIZED	<input checked="" type="checkbox"/> Used	<input type="text" value="1"/>	<input type="text" value="0.00"/>	
UPC <input type="text"/>	Store Split by Location <input type="text" value="50%"/>	Start Date <input type="text" value="12/20/2022"/>	Expire Date <input type="text" value="6/17/2024"/>	Item Fee <input type="text" value="10.00"/>	
Vendor <input type="text"/>	<input checked="" type="checkbox"/> Do not discount <input checked="" type="checkbox"/> Memo Pricing			MSRP <input type="text" value="0.00"/>	

- **Copy** - A copy of an item will be created and given its own SKU.
- **X (Remove)** - Will delete the specified item from the Add Store Inventory screen.

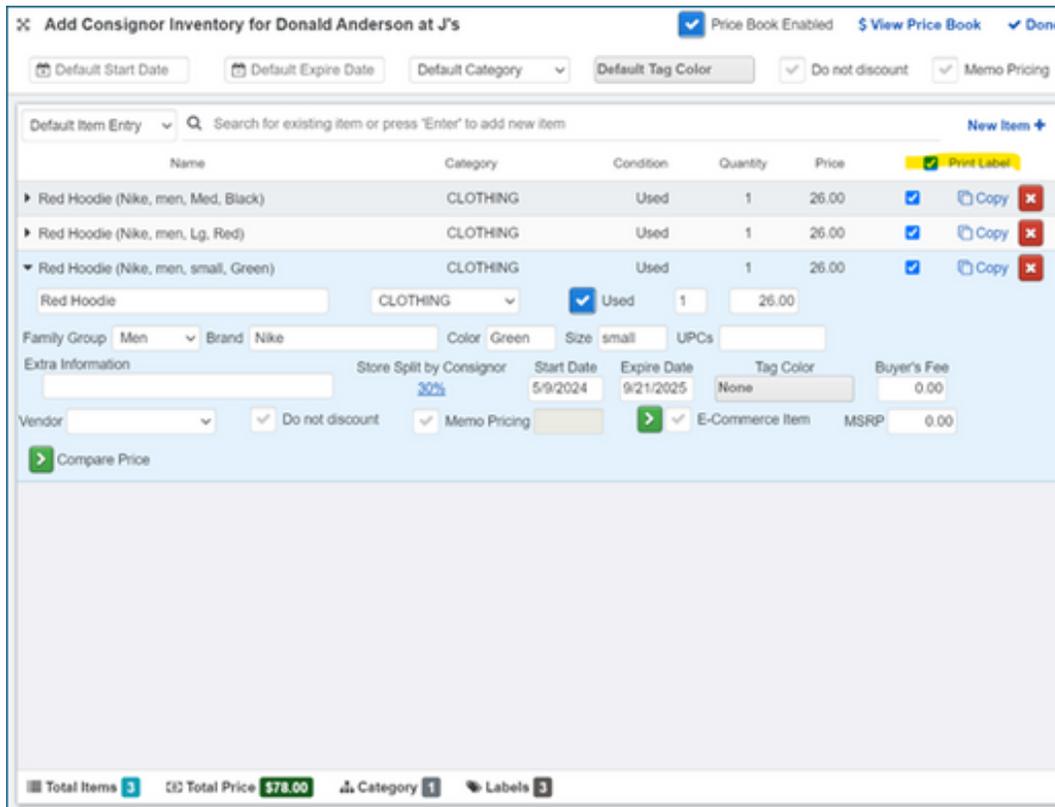
Submit Inventory Batch

After you've filled out the item's details, you can add more items using one of the shortcuts outlined above. Click **Done** when you have finished entering all your items. The next section details printing labels/tags.

Print Consignment Labels

There are several ways to print labels in SimpleConsign.

- **Option 1:** Print labels from the **Add Consignor Inventory** (Consignment tab) or **Add Store Inventory** screen (Inventory tab) when adding inventory. Before clicking **Done**, check the **Print Label** checkbox below **New Item +**.



Add Consignor Inventory for Donald Anderson at J's Price Book Enabled [View Price Book](#) Done

Default Start Date Default Expire Date Default Category Default Tag Color Do not discount Memo Pricing

Default Item Entry Search for existing item or press 'Enter' to add new item New Item +

Name	Category	Condition	Quantity	Price	<input checked="" type="checkbox"/> Print Label
▶ Red Hoodie (Nike, men, Med, Black)	CLOTHING	Used	1	26.00	<input checked="" type="checkbox"/> Copy <input type="text"/>
▶ Red Hoodie (Nike, men, Lg, Red)	CLOTHING	Used	1	26.00	<input checked="" type="checkbox"/> Copy <input type="text"/>
▼ Red Hoodie (Nike, men, small, Green)	CLOTHING	Used	1	26.00	<input checked="" type="checkbox"/> Copy <input type="text"/>

Red Hoodie CLOTHING Used 1 26.00

Family Group Men Brand Nike Color Green Size small UPCs

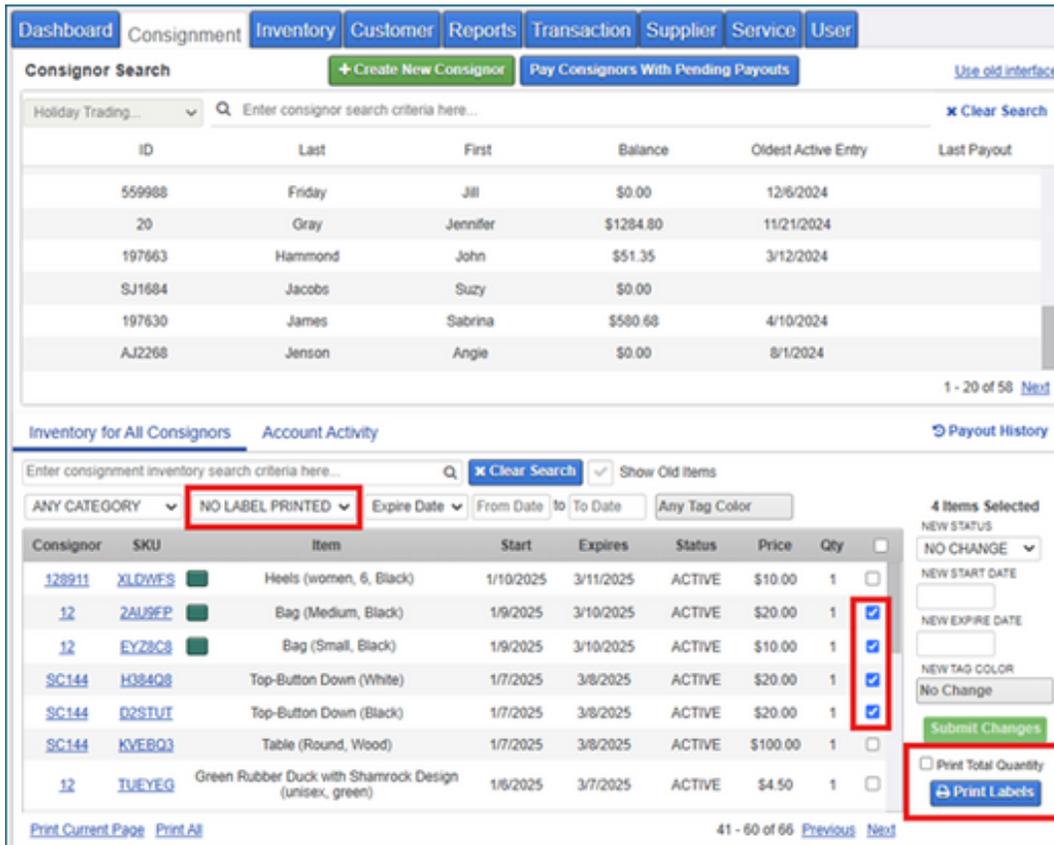
Extra Information Store Split by Consignor 30% Start Date 5/9/2024 Expire Date 9/21/2025 Tag Color None Buyer's Fee 0.00

Vendor Do not discount Memo Pricing E-Commerce Item MSRP 0.00

Compare Price

Total Items **3** Total Price **\$78.00** Category **1** Labels **3**

- **Option 2:** On the **Consignment** tab, select the items you wish to print and then click **Print Labels**. Check the **Print Total Quantity** to print the total quantity of those items.



The screenshot shows the SimpleConsign interface with the following elements:

- Navigation:** Dashboard, Consignment, Inventory, Customer, Reports, Transaction, Supplier, Service, User.
- Consignor Search:** Includes a search bar and a table with columns: ID, Last, First, Balance, Oldest Active Entry, Last Payout.
- Inventory for All Consignors:**
 - Search criteria: "NO LABEL PRINTED" (highlighted in red).
 - Table columns: Consignor, SKU, Item, Start, Expires, Status, Price, Qty.
 - Selected items (checked in Qty column):

Consignor	SKU	Item	Start	Expires	Status	Price	Qty
128911	XLDWFS	Heels (women, 6, Black)	1/10/2025	3/11/2025	ACTIVE	\$10.00	1
12	2AUZFP	Bag (Medium, Black)	1/9/2025	3/10/2025	ACTIVE	\$20.00	1
12	EY2BC8	Bag (Small, Black)	1/9/2025	3/10/2025	ACTIVE	\$10.00	1
SC144	H38408	Top-Button Down (White)	1/7/2025	3/8/2025	ACTIVE	\$20.00	1
SC144	D2STUT	Top-Button Down (Black)	1/7/2025	3/8/2025	ACTIVE	\$20.00	1
SC144	KVERQ3	Table (Round, Wood)	1/7/2025	3/8/2025	ACTIVE	\$100.00	1
12	TUEYEG	Green Rubber Duck with Shamrock Design (unisex, green)	1/6/2025	3/7/2025	ACTIVE	\$4.50	1
 - Actions:** "Print Labels" button (highlighted in red) and "Print Total Quantity" checkbox (checked).

You can limit the items shown by selecting the status of **NO LABEL PRINTED** to view only the items that have not been printed.

- **Option 3:** On the **Consignment** tab or **Inventory** tab, click on an item's SKU to view the details. You can enter the number of labels you'd like to print for that item, then click **Print Labels** button.

Consignor	SKU	Item	Start	Expires
57675	B87B6K	Wine glass 2	12/15/2023	2/13/2024

B87B6K - Wine glass 2 ACTIVE

Details Images History E-commerce Discounts

Basic Information (SKU: B87B6K)

NAME
Wine glass 2

CATEGORY: WINE GLASS VENDOR:

DESCRIPTION / EXTRA INFORMATION

Stock Information & Pricing

QUANTITY: USED:

RETAIL: MSRP: DISCOUNT: DO NOT DISCOUNT:

[View Price Book](#)
[Compare Price](#)

Print Labels [Save](#) [Sa](#)

Batch printing

Adding inventory automatically creates a batch. You can print the batch by navigating to the **Inventory** tab and selecting **View Batch History**.



Next, click **Include Consignment Batches**.

Inventory Batch History for J's				
<input checked="" type="checkbox"/> Include Consignment Batches X				
Date	Employee	Batch Number	Item Count	Total Cost
5/9/2024	Joe Owner	Consignment	3	N/A

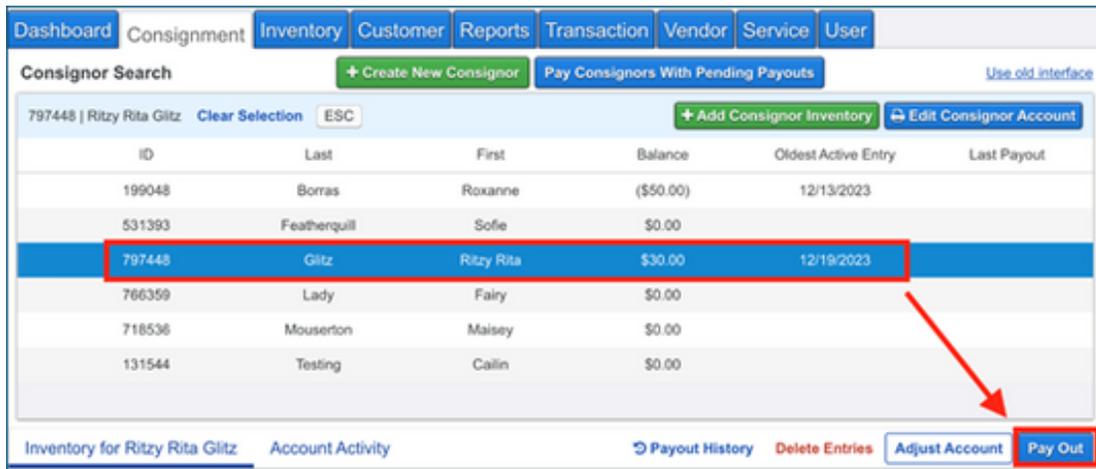
Double-click on the batch, check **Print All**, and then **Print Labels**.

Consignor Batch						
LOCATION	DATE	EMPLOYEE	<input checked="" type="checkbox"/> Print All X			
J's	5/9/2024					
Sku	Name	Quantity	Condition	Cost	Retail	Label
ZL7EWS	Red Hoodie	1	used	\$0.00	\$26.00	<input checked="" type="checkbox"/>
YQ88CH	Red Hoodie	1	used	\$0.00	\$26.00	<input checked="" type="checkbox"/>
N1RXH4	Red Hoodie	1	used	\$0.00	\$26.00	<input checked="" type="checkbox"/>
<input type="button" value="Print Labels"/> <input type="button" value="Print Total Quantity"/>						

Consignor Payouts

Pay Out Individual Consignors

1. On the **Consignment** tab, click **Consignor Search** and select the desired consignor by clicking their name.
2. Click the **Pay Out** button.



Dashboard | Consignment | Inventory | Customer | Reports | Transaction | Vendor | Service | User

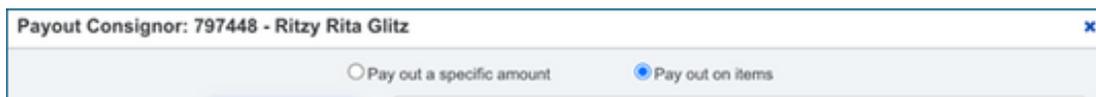
Consignor Search + Create New Consignor Pay Consignors With Pending Payouts Use old interface

797448 | Ritzy Rita Glitz Clear Selection ESC + Add Consignor Inventory Edit Consignor Account

ID	Last	First	Balance	Oldest Active Entry	Last Payout
199048	Borras	Roxanne	(\$50.00)	12/13/2023	
531393	Featherquill	Sofie	\$0.00		
797448	Glitz	Ritzy Rita	\$30.00	12/19/2023	
766359	Lady	Fairy	\$0.00		
718536	Mouserton	Maisey	\$0.00		
131544	Testing	Callin	\$0.00		

Inventory for Ritzy Rita Glitz Account Activity Payout History Delete Entries Adjust Account Pay Out

1. There are two methods for processing payouts:
 - Paying out a specific amount.
 - Paying out on items.



Payout Consignor: 797448 - Ritzy Rita Glitz

Pay out a specific amount Pay out on items

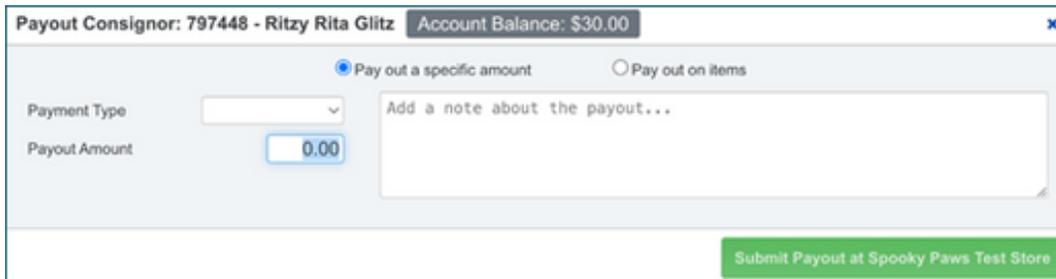
Important note: It is generally advisable to pay out based on individual items to ensure proper reconciliation and prevent duplicate payouts for the same items.

Pay out a specific amount

This method adjusts the consignor's account balance but does not reconcile individual items.

Steps:

1. Enter the payout amount.
2. Select the payment type.
 - (Optional) If paying by check, enter the check number.
 - (Optional) Add notes to provide additional details about the payout.
3. Click **Submit Payout** to complete the process.



The screenshot shows a web form titled "Payout Consignor: 797448 - Ritzy Rita Glitz" with a sub-header "Account Balance: \$30.00". The form has two radio buttons: "Pay out a specific amount" (selected) and "Pay out on items". Below the radio buttons, there is a "Payment Type" dropdown menu and a "Payout Amount" input field containing "0.00". To the right of these fields is a text area labeled "Add a note about the payout...". At the bottom right of the form is a green button labeled "Submit Payout at Spooky Paws Test Store".

Pay out on items

This method adjusts the account balance and marks selected items as paid.

Steps:

1. Select the cutoff date to limit the payout to entries on or before that date.
2. Specify whether the cutoff date applies to the **Entry Date** or **Expire Date** of the consignor's account activity.
3. Choose the payment type:
 - Options:
 - SimpleACH (must be enabled at the [Store](#) and [Consignor](#) level)
 - Cash
 - Check - If paying by check, enter the check number.
 - Store Credit
4. Add notes to provide additional payout details (Optional).

- Click **Submit Payout** to finalize. If printing both a check and a detailed report, the check will print first.

Payout Consignor: 797448 - Ritzy Rita Glitz

Pay out a specific amount
 Pay out on items

Payment Type:

Initial Payout Amount:

Additional Store Credit Amount: 3.00

Total Payout Amount:

Add a note about the payout...

Item Activity Cutoff: by Entry Date Expire Date

<input checked="" type="checkbox"/>	Entry Date	Expire Date	Description	Amount	Location
<input checked="" type="checkbox"/>	12/19/2023	6/16/2024	Haunted 1920's Engagement Ring	\$30.00	Spooky Paws Test Store

1 items selected totaling \$30.00

Print Detailed Report

Handle Negative Account Entries

If the consignor's account has a negative entry you want to include in the payout, ensure it is selected along with the other items before submission.

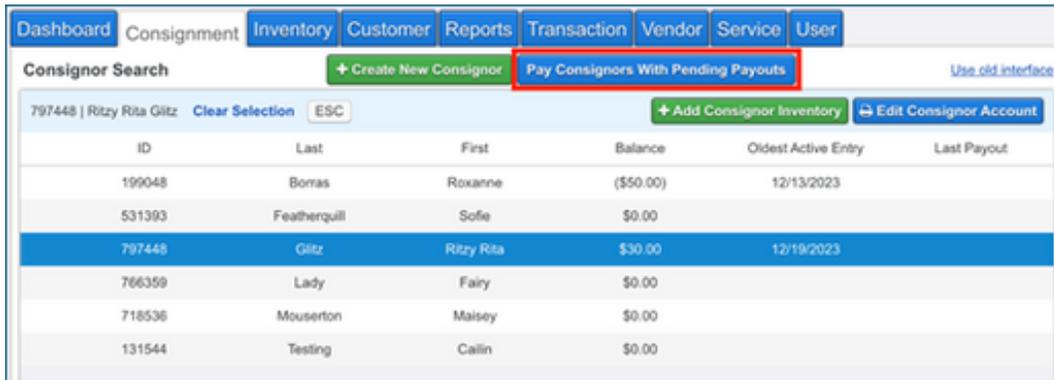
Cash Payouts

If cash is not available as a payment option, you are either processing the payout from Back Office or from a Terminal that has not yet been opened. For more details, refer to:

- [Back Office vs. Terminal](#)
- [Logging Into a Terminal](#)
- [Opening a Terminal](#)

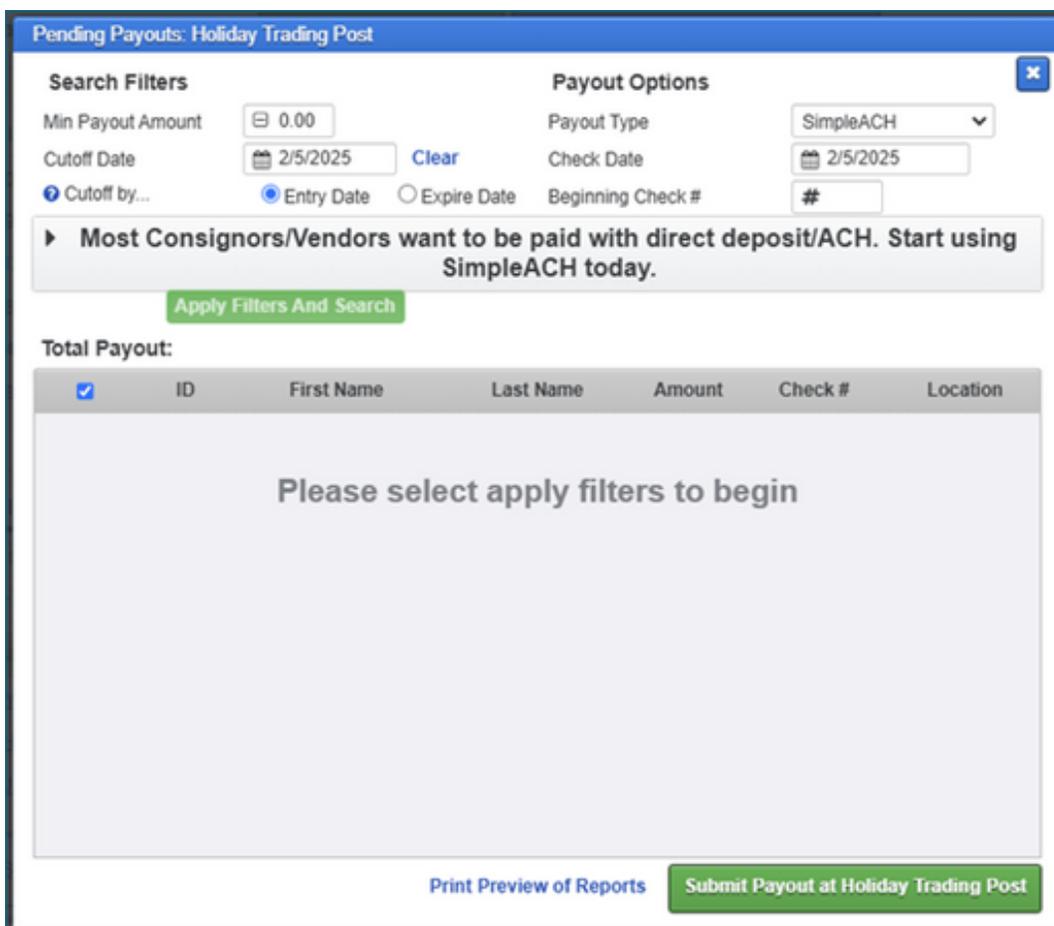
Pay Out Consignors in Bulk

1. To process bulk payouts, click the **Pay Consignors With Pending Payouts** button in the **Consignment** tab.



ID	Last	First	Balance	Oldest Active Entry	Last Payout
199048	Borras	Roxanne	(\$50.00)	12/13/2023	
531393	Featherquill	Sofe	\$0.00		
797448	Giltz	Ritzy Rita	\$30.00	12/19/2023	
766359	Lady	Fairy	\$0.00		
718536	Mouseton	Maisey	\$0.00		
131544	Testing	Callin	\$0.00		

2. Enter the minimum payout amount. Consignors with balances below this amount will retain their current balance.



Pending Payouts: Holiday Trading Post

Search Filters

Min Payout Amount:

Cutoff Date: [Clear](#)

Cutoff by... Entry Date Expire Date

Payout Options

Payout Type:

Check Date:

Beginning Check #:

Most Consignors/Vendors want to be paid with direct deposit/ACH. Start using SimpleACH today.

[Apply Filters And Search](#)

Total Payout:

<input checked="" type="checkbox"/>	ID	First Name	Last Name	Amount	Check #	Location
Please select apply filters to begin						

[Print Preview of Reports](#) [Submit Payout at Holiday Trading Post](#)

3. Select the **Payout Type**.

- Options:
- SimpleACH (must be enabled at the [Store](#) and [Consignor](#) level).
- Check - If paying by check, enter the check date and beginning check number.
- Store Credit.

*Cash payments **are not** available for bulk payouts.*

4. Choose the cutoff date to limit the payout to entries on or before this date.
5. Specify whether the cutoff date applies to the **Entry Date** or **Expire Date** of the consignors' account activity.

6. Click **Apply Filters and Search** to view consignors eligible for payout based on the selected filters.
7. Uncheck any Consignors you do not wish to include in the payout.
8. **Submit Payout at your store.**

Important note: Once you have submitted your payout, you have the option to print **Checks, All Payout Reports, and Batch Summary Report**. These can be printed in any order.

Holiday Trading Post **Payout History**

✔ Batch Payout Complete!
 You can print consignor reports, a batch summary and checks here Hide

Showing Batch 307 📄 Checks 📄 All Payout Reports 📄 Batch Summary Report ✖ Void Batch

Batch	Consignor	Payout Date	Cutoff Date	Type	Amount	Actions
307	9000 Sally Ames	2/3/2025 6:03 PM	2/3/2025	CHECK - 100	\$419.00	✖ Void 📄 Report
307	128011 Harry Beaton	2/3/2025 6:03 PM	2/3/2025	CHECK - 101	\$45.36	✖ Void 📄 Report
307	908884 Carol Breslin	2/3/2025 6:03 PM	2/3/2025	CHECK - 102	\$215.00	✖ Void 📄 Report
307	80144 Fiona Campbell	2/3/2025 6:03 PM	2/3/2025	CHECK - 103	\$671.85	✖ Void 📄 Report
307	887360 John Coffey	2/3/2025 6:03 PM	2/3/2025	CHECK - 104	\$171.94	✖ Void 📄 Report
307	881288 Jan Edgecomb	2/3/2025 6:03 PM	2/3/2025	CHECK - 105	\$507.84	✖ Void 📄 Report
307	820402 Kimberly Ford	2/3/2025 6:03 PM	2/3/2025	CHECK - 106	\$488.83	✖ Void 📄 Report
307	20 Jennifer Gray	2/3/2025 6:03 PM	2/3/2025	CHECK - 107	\$1284.80	✖ Void 📄 Report
307	187083 John Hammond	2/3/2025 6:03 PM	2/3/2025	CHECK - 108	\$51.35	✖ Void 📄 Report
307	810177 Sabrina James	2/3/2025 6:03 PM	2/3/2025	CHECK - 109	\$50.68	✖ Void 📄 Report

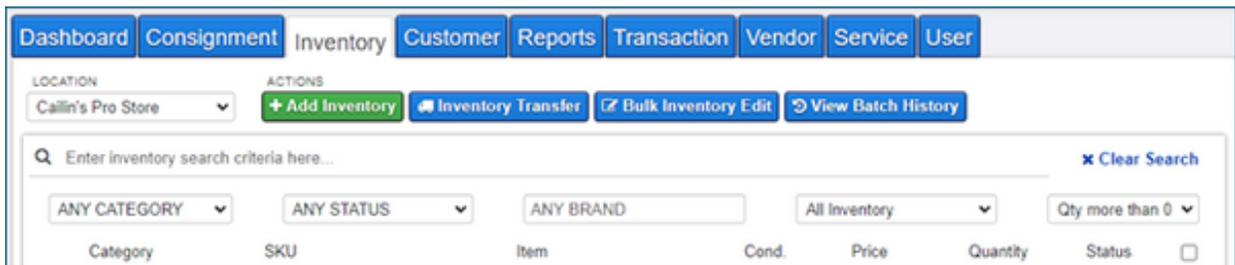
1 - 20 of 27 [Next](#)

Inventory Tab

The Inventory tab can be accessed from either Back Office or Terminal.

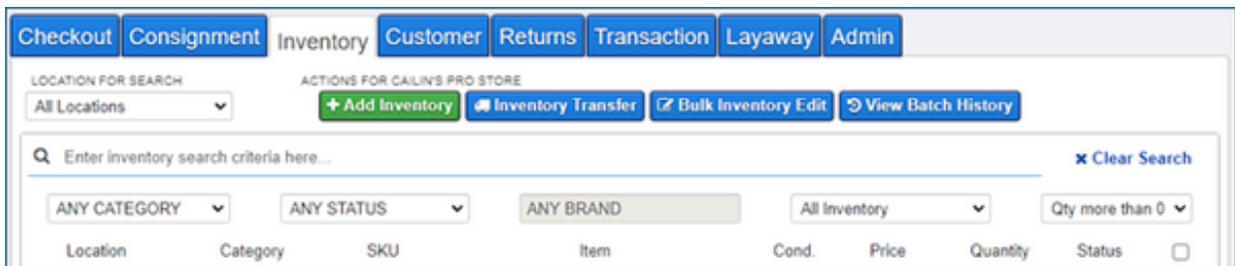
The level of access is the same in both places, but some actions may be restricted on the Terminal side depending on your user permissions.

Back Office



The screenshot shows the Back Office navigation menu with tabs for Dashboard, Consignment, Inventory, Customer, Reports, Transaction, Vendor, Service, and User. The Inventory tab is active. Below the menu, there is a 'LOCATION' dropdown set to 'Cailin's Pro Store' and 'ACTIONS' buttons for '+ Add Inventory', 'Inventory Transfer', 'Bulk Inventory Edit', and 'View Batch History'. A search bar is present with the placeholder 'Enter inventory search criteria here...' and a 'Clear Search' button. Below the search bar are filters for 'ANY CATEGORY', 'ANY STATUS', 'ANY BRAND', 'All Inventory', and 'Qty more than 0'. At the bottom, a table header lists columns: Category, SKU, Item, Cond., Price, Quantity, and Status.

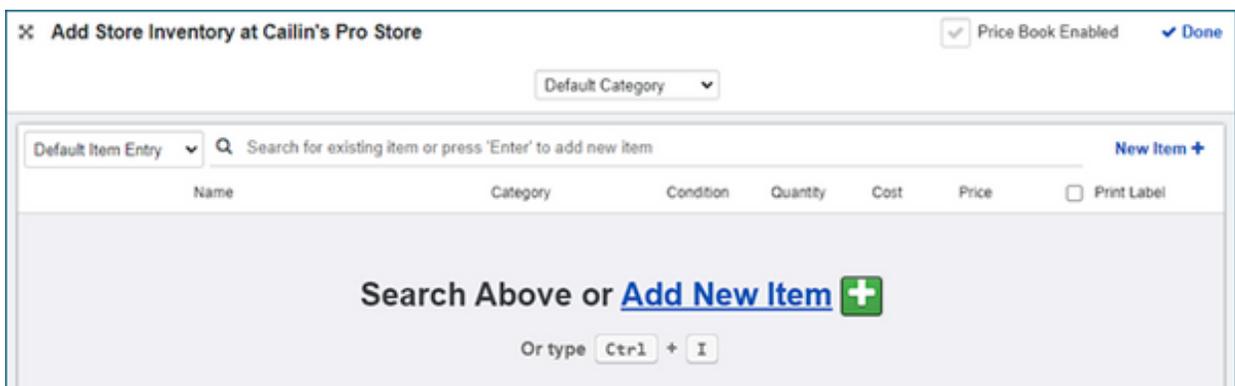
Terminal



The screenshot shows the Terminal navigation menu with tabs for Checkout, Consignment, Inventory, Customer, Returns, Transaction, Layaway, and Admin. The Inventory tab is active. Below the menu, there is a 'LOCATION FOR SEARCH' dropdown set to 'All Locations' and 'ACTIONS FOR CAILIN'S PRO STORE' buttons for '+ Add Inventory', 'Inventory Transfer', 'Bulk Inventory Edit', and 'View Batch History'. A search bar is present with the placeholder 'Enter inventory search criteria here...' and a 'Clear Search' button. Below the search bar are filters for 'ANY CATEGORY', 'ANY STATUS', 'ANY BRAND', 'All Inventory', and 'Qty more than 0'. At the bottom, a table header lists columns: Location, Category, SKU, Item, Cond., Price, Quantity, and Status.

Start an Inventory Batch + Choose Defaults

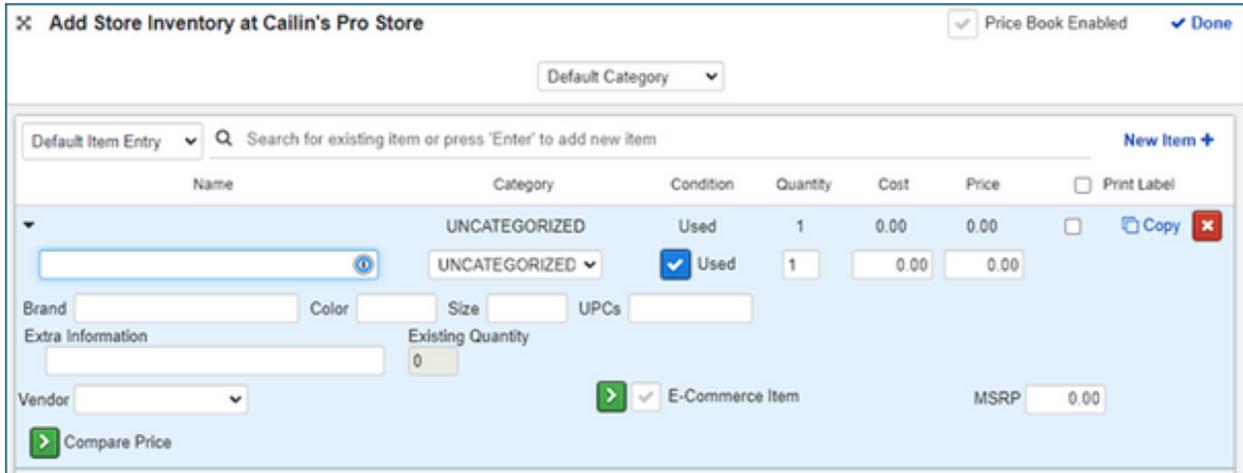
Select the desired location from the location dropdown then click + **Add Inventory**. This will open a window for entering Store Owned inventory.



The screenshot shows the 'Add Store Inventory at Cailin's Pro Store' window. It has a title bar with a close button, a 'Price Book Enabled' checkbox, and a 'Done' button. Below the title bar is a 'Default Category' dropdown. A search bar is present with the placeholder 'Search for existing item or press 'Enter' to add new item' and a 'New Item +' button. Below the search bar is a table header with columns: Name, Category, Condition, Quantity, Cost, Price, and Print Label. At the bottom, there is a large green button that says 'Search Above or Add New Item +' and a keyboard shortcut 'Or type Ctrl + I'.

Enter Inventory

When you are ready to enter inventory, you can click **New Item +**, use the keyboard shortcut **Ctrl + i**, or if you haven't moved your cursor from the search field – press **Enter**.



The screenshot shows the 'Add Store Inventory' interface. At the top, there's a title 'Add Store Inventory at Cailin's Pro Store' and a 'Price Book Enabled' checkbox. Below the title is a 'Default Category' dropdown. A search bar contains the text 'Search for existing item or press 'Enter' to add new item'. To the right of the search bar is a 'New Item +' button. Below the search bar is a table with columns: Name, Category, Condition, Quantity, Cost, Price, and Print Label. The table has one row with the following values: Name (empty), Category (UNCATEGORIZED), Condition (Used), Quantity (1), Cost (0.00), Price (0.00), and Print Label (checkbox). Below the table are several input fields: a text field for Name, a dropdown for Category (UNCATEGORIZED), a checkbox for Condition (Used), a text field for Quantity (1), a text field for Cost (0.00), a text field for Price (0.00), a text field for Brand, a text field for Color, a text field for Size, a text field for UPCs, a text field for Extra Information, a text field for Existing Quantity (0), a dropdown for Vendor, a checkbox for E-Commerce Item, and a text field for MSRP (0.00). At the bottom left, there is a 'Compare Price' button.

- **Copy** - Will make a copy of an item that will be given its own SKU.
- **X (Remove)** - Will delete the specified item from the Add Store Inventory screen.

Submit Inventory Batch

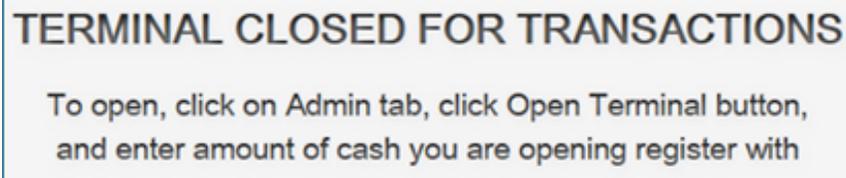
After you've filled out the item's details, you can add more items using one of the shortcuts outlined above. Click **Done** when you have finished entering all your items. If you'd like to print labels for all the items you've just entered, check the **Print All** checkbox by the **Done** button first.

Checkout Tab

Open the Terminal

The Terminal must be open to make sales. If you're unfamiliar with that process, please review the [Open a Terminal](#) article to learn more.

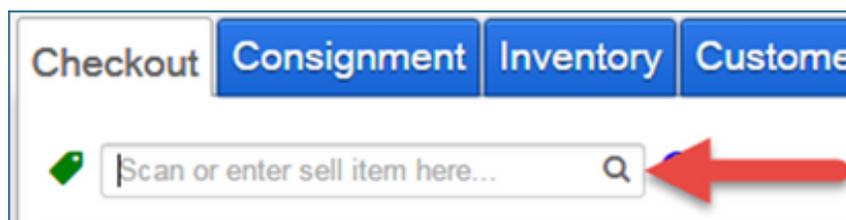
If you see the following message, you need to open the terminal before continuing.



Add an Item to a Transaction

There are four ways to add an item to a transaction:

1. Scanning the Barcode.
2. Searching for the Item.
3. Line-Item Entry.
4. Add New Item Shortcut (usually used in antique malls).



Scanning the Barcode

First, click inside the search bar next to the green tag. Then scan the barcode or enter the SKU. The item will automatically be added to the transaction.

Searching for the Item

Click inside the search bar next to the green tag. Type in a short description of the item name you want to find and press the "Enter" key.



SimpleConsign will search your inventory and display the search results. If no items match your search, a new blank item will be added to the transaction. You can enter the item details to quick add the item to the sale.

Please select the item you are looking for

Category	S K U	Name	Condition	Quantity	Price	Status
CLOTHING	ND1SAH	Chase Authentics Clint Bowyer Big & Tall Edge T-Shirt	Used	0	\$13.50	ACTIVE
CLOTHING	37LRYP	CLEVELAND INDIANS kids T-shirt baseball Grady Sizemore	New	1	\$2.00	ACTIVE
CLOTHING	1NWWY6	New Nhl Los Angeles Kings T Shirt Mens X Large	New	2	\$1.70	ACTIVE
CLOTHING	SYQ5SD	New University Of Minnesota T Shirt Girls Medium	Used	1	\$1.09	ACTIVE
CLOTHING	ZCSQBP	New Wt Dominicana #24 M Ramirez T Shirt Boys M 10/12	Used	0	\$0.73	ACTIVE
CLOTHING	4ZXXRF	New Wt Nascar Dale Earnhardt #3 Ls T Shirt Boys 8	Used	0	\$1.06	ACTIVE
CLOTHING	LFBZYD	New Wt Nascar Matt Kenseth #17 T Shirt Mens Large !!	Used	2	\$1.03	ACTIVE

Try Another Search
(new search by different search term)

Found My Item
(select item, adds to qty if adding inventory)

Add Similar Item
(new item, new SKU, new qty w/ same data)

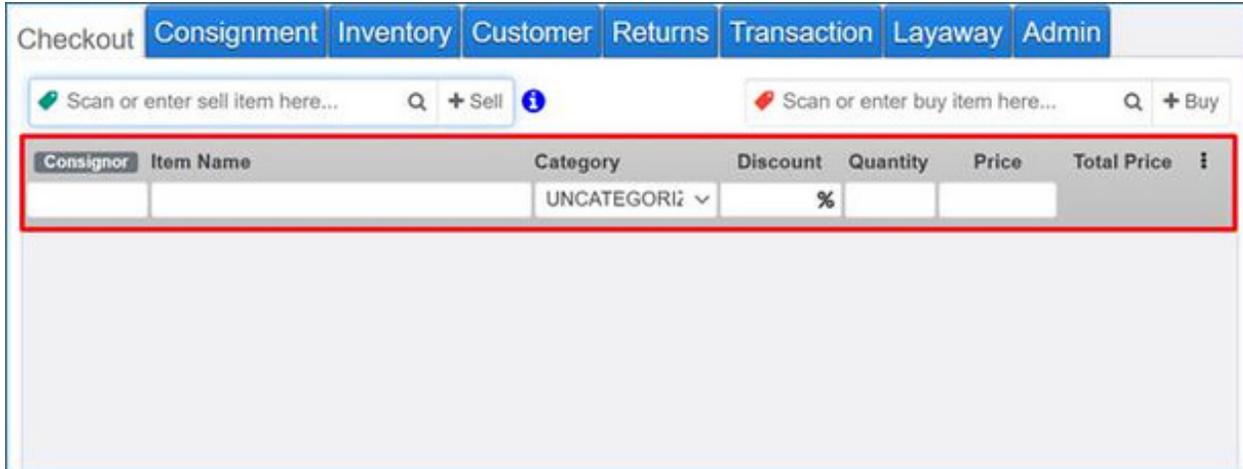
Enter Item Manually
(enter item information myself)

If you did not find the item you were looking for you can click the **Try Another Search** button and search again. If you find your item and wish to add it to the transaction, either double click on the item or select it by clicking it once and then clicking the **Found My Item** button.

You can add a new item to your inventory from here. If you wish to take some of the details from another item that had been previously entered, you can select that item and click the **Add Similar Item** button and edit the details from there. You can also add a blank item that will have the name of whatever you searched for by clicking the **Enter Item Manually** button and you can fill in the rest of the details.

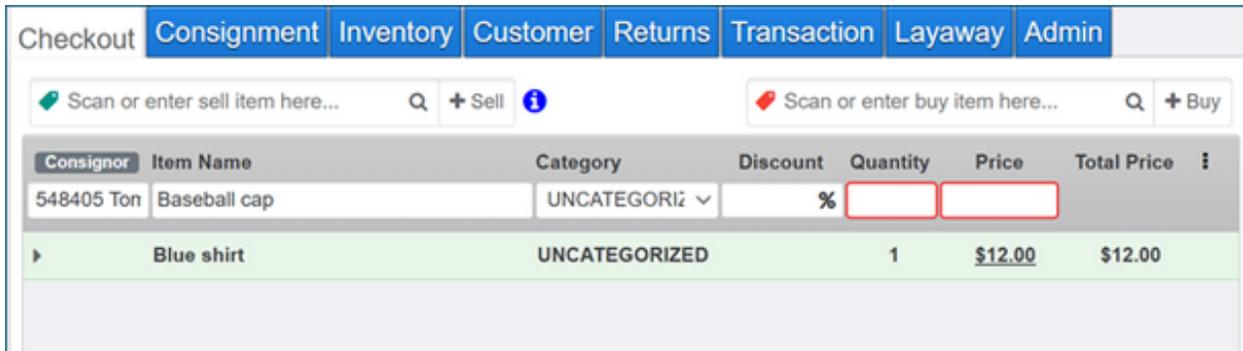
Line-Item Entry

The line-item entry feature streamlines the process of adding items to a transaction during checkout. It includes clearly labeled column headers to help you quickly view and input key item details.



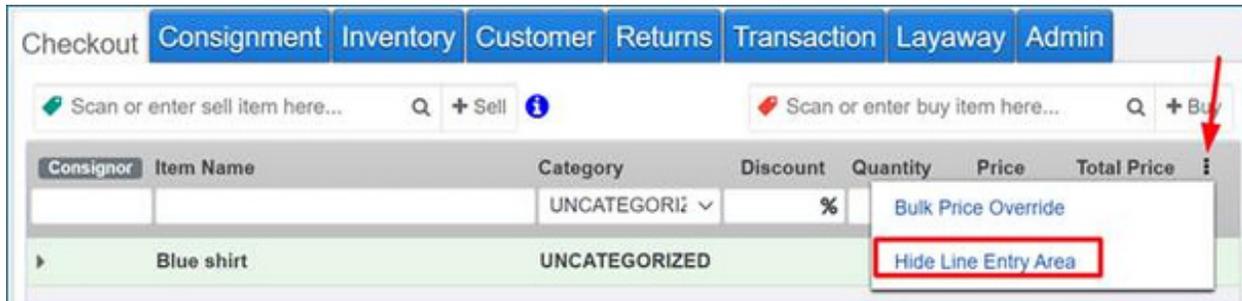
Consignor	Item Name	Category	Discount	Quantity	Price	Total Price	
		UNCATEGORIz	%				

You can navigate through the entry fields by tabbing over to populate the required information. Press "Enter" to finalize the item and add it to the transaction. A new entry line will automatically appear if you need to add additional items.



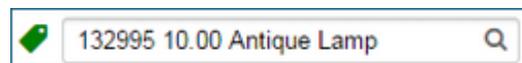
Consignor	Item Name	Category	Discount	Quantity	Price	Total Price	
548405 Ton	Baseball cap	UNCATEGORIz	%				
	Blue shirt	UNCATEGORIZED		1	\$12.00	\$12.00	

This feature is enabled by default but can be hidden if needed. To hide, click the "three dots" icon and select **Hide Line Entry Area**.



Add New Item Shortcut (antique mall shortcut)

This shortcut allows you to add an item to your inventory and sell it in the same transaction and is often used in antique malls. Click inside the search area next to the green tag and type in an item using the following format: "**ConsignorID Price ItemName**". See example below.



Important Note: The dollar amount must include two decimal places, as shown above.

Press the "Enter" key and a new item will be added to the transaction. You can then click on the item and fill in any additional information.

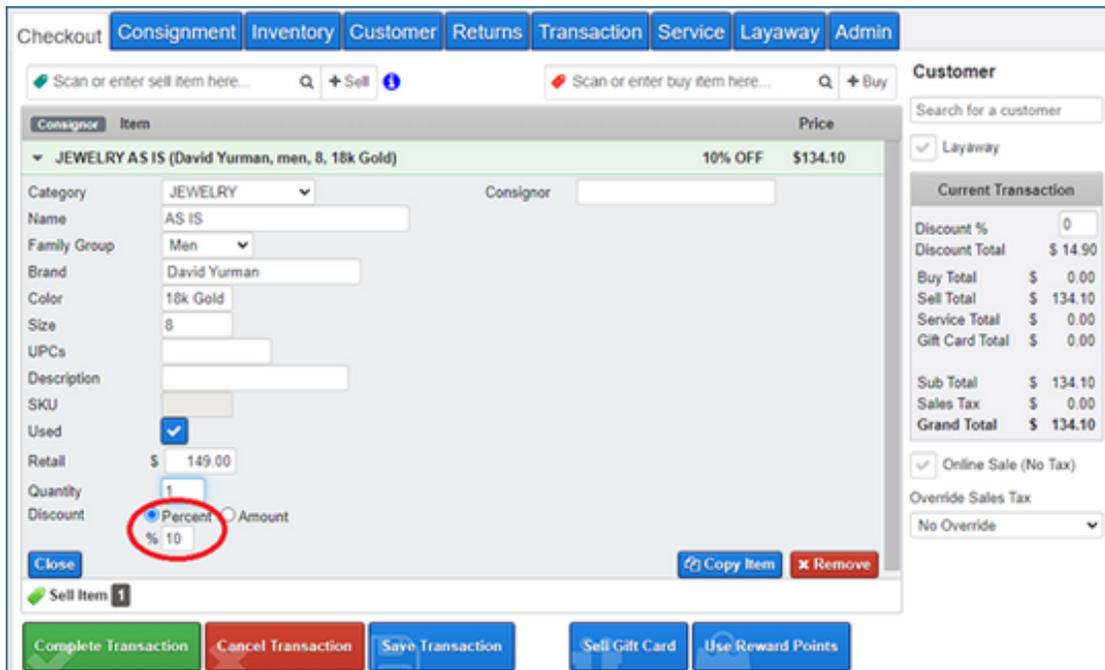
How To Discount at Checkout

Types of Checkout Discounts

Item Discount

Percentage

You can discount an item by a percentage by clicking to expand the item at checkout and selecting the **Percent** option for **Discount**. The percentage entered will only be applied to that item.



The screenshot shows the checkout interface with a navigation bar at the top containing: Checkout, Consignment, Inventory, Customer, Returns, Transaction, Service, Layaway, and Admin. Below the navigation bar are two search fields: "Scan or enter sell item here..." and "Scan or enter buy item here...".

The main area displays an item card for "JEWELRY AS IS (David Yurman, men, 8, 18k Gold)" with a price of \$134.10 and a 10% OFF discount. The item details include:

- Category: JEWELRY
- Name: AS IS
- Family Group: Men
- Brand: David Yurman
- Color: 18k Gold
- Size: 8
- UPCs: (empty)
- Description: (empty)
- SKU: (empty)
- Used:
- Retail: \$ 149.00
- Quantity: 1
- Discount: Percent Amount

 The "Percent" radio button and the "% 10" text are circled in red.

At the bottom of the item card are buttons for "Close", "Copy Item", and "Remove". Below the item card is a "Sell Item" button with a count of 1.

On the right side, there is a "Customer" section with a search field and a "Layaway" checkbox. Below that is a "Current Transaction" summary table:

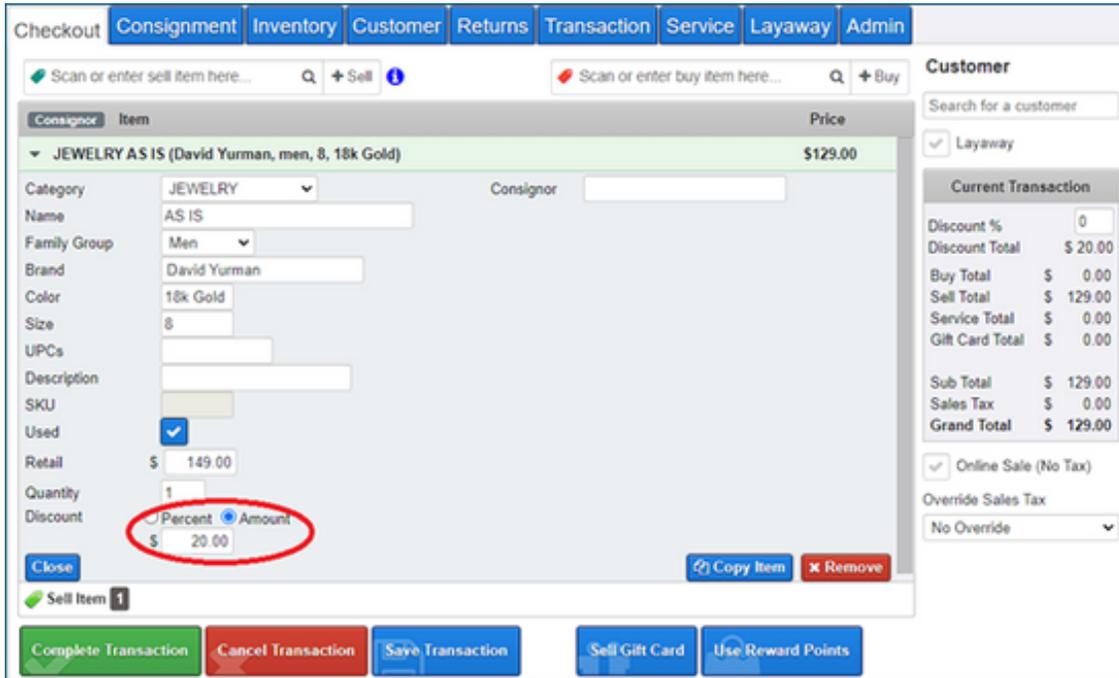
Discount %	0
Discount Total	\$ 14.90
Buy Total	\$ 0.00
Sell Total	\$ 134.10
Service Total	\$ 0.00
Gift Card Total	\$ 0.00
Sub Total	\$ 134.10
Sales Tax	\$ 0.00
Grand Total	\$ 134.10

 Below the table are checkboxes for "Online Sale (No Tax)" and "Override Sales Tax" (set to "No Override").

At the bottom of the interface are five large buttons: "Complete Transaction" (green), "Cancel Transaction" (red), "Save Transaction" (blue), "Sell Gift Card" (blue), and "Use Reward Points" (blue).

Amount

To discount by a specific amount, choose the **Amount** option for discount. The amount will reduce the item's sell price.



The screenshot shows the SimpleConsign interface with the 'Transaction' tab selected. The main area displays item details for 'JEWELRY AS IS (David Yurman, men, 8, 18k Gold)' with a price of \$129.00. The 'Discount' section is visible, showing 'Percent' and 'Amount' radio buttons. The 'Amount' option is selected and circled in red, with a value of '\$ 20.00' entered in the adjacent field. The 'Retail' price is \$149.00. On the right, the 'Customer' section shows a search bar and a 'Layaway' checkbox. Below that, the 'Current Transaction' summary table is displayed:

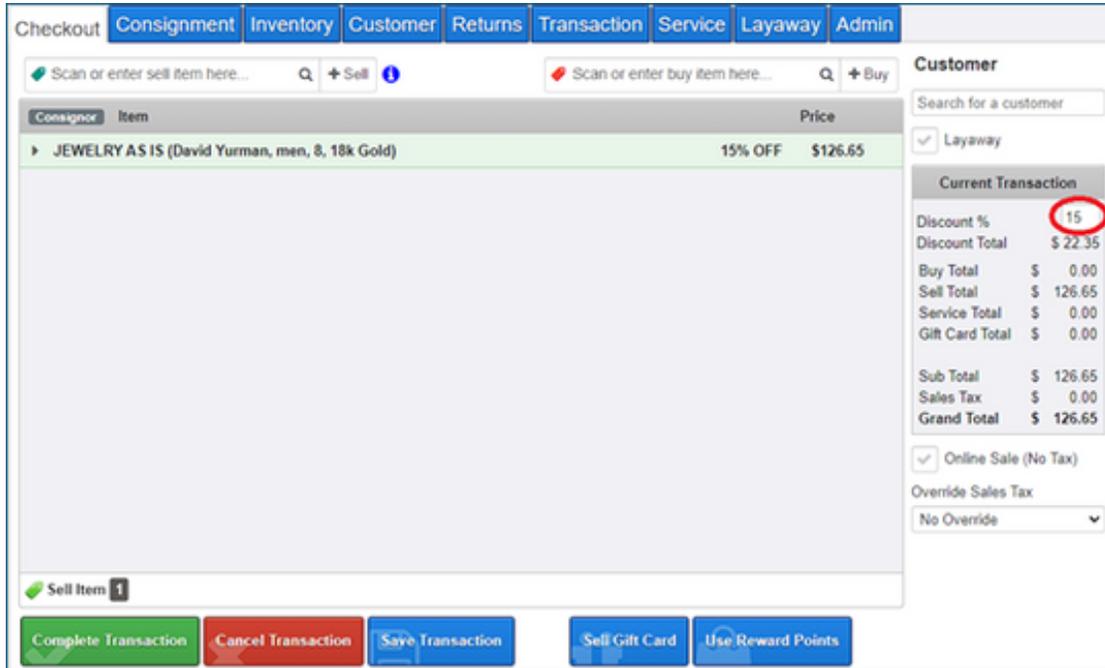
Current Transaction	
Discount %	0
Discount Total	\$ 20.00
Buy Total	\$ 0.00
Sell Total	\$ 129.00
Service Total	\$ 0.00
Gift Card Total	\$ 0.00
Sub Total	\$ 129.00
Sales Tax	\$ 0.00
Grand Total	\$ 129.00

At the bottom of the interface, there are buttons for 'Complete Transaction', 'Cancel Transaction', 'Save Transaction', 'Sell Gift Card', and 'Use Reward Points'.

Transaction Discount

Percentage

You can discount all items on the transaction by a specific percentage in the **Current Transaction** box to the right – **Discount %**.



The screenshot displays the SimpleConsign software interface. At the top, there are navigation tabs: Checkout, Consignment, Inventory, Customer, Returns, Transaction, Service, Layaway, and Admin. Below these are search bars for selling and buying items. The main area shows a table with columns for Consignor, Item, and Price. One item is listed: 'JEWELRY AS IS (David Yurman, men, 8, 18k Gold)' with a '15% OFF' discount and a price of '\$126.65'. On the right side, there is a 'Customer' section with a search bar and a 'Layaway' checkbox. Below that is the 'Current Transaction' section, which includes a 'Discount %' field set to '15' (circled in red), and a summary of totals: Discount Total (\$22.35), Buy Total (\$0.00), Sell Total (\$126.65), Service Total (\$0.00), Gift Card Total (\$0.00), Sub Total (\$126.65), Sales Tax (\$0.00), and Grand Total (\$126.65). There are also checkboxes for 'Online Sale (No Tax)' and 'Override Sales Tax' (set to 'No Override'). At the bottom, there are buttons for 'Complete Transaction', 'Cancel Transaction', 'Save Transaction', 'Sell Gift Card', and 'Use Reward Points'.

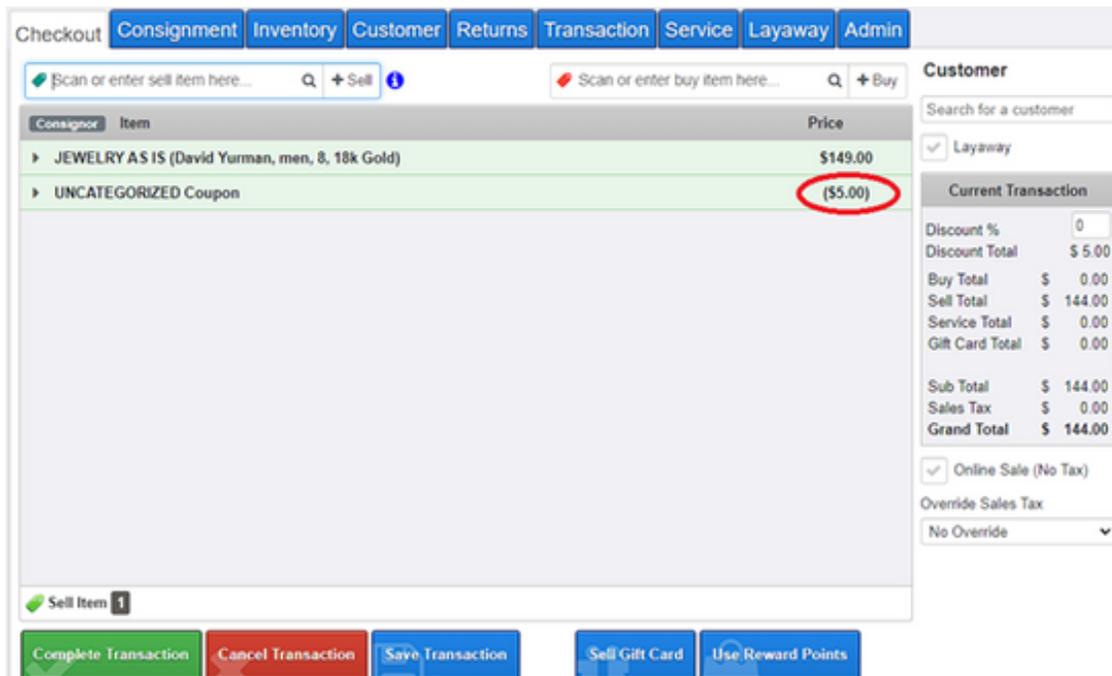
Consignor	Item	Price
	JEWELRY AS IS (David Yurman, men, 8, 18k Gold)	15% OFF \$126.65

Current Transaction	
Discount %	15
Discount Total	\$ 22.35
Buy Total	\$ 0.00
Sell Total	\$ 126.65
Service Total	\$ 0.00
Gift Card Total	\$ 0.00
Sub Total	\$ 126.65
Sales Tax	\$ 0.00
Grand Total	\$ 126.65

Coupon

Important Note: The discount methods above will decrease the amount the consignor will get. The split is calculated based on what an item sells for, not the retail price. If you'd like to discount a transaction and not impact the consignor's split, use the coupon method.

You can create an item with a negative retail value and add it to the transaction.



The screenshot shows the SimpleConsign interface during a transaction. At the top, there are navigation tabs: Checkout, Consignment, Inventory, Customer, Returns, Transaction, Service, Layaway, and Admin. Below these are search bars for scanning or entering sell/buy items. The main area displays a list of items with columns for 'Consignor', 'Item', and 'Price'. Two items are listed: 'JEWELRY AS IS (David Yurman, men, 8, 18k Gold)' with a price of \$149.00, and 'UNCATEGORIZED Coupon' with a price of (\$5.00). The price for the coupon is circled in red. To the right, there is a 'Customer' section with a search bar and a 'Current Transaction' summary table. At the bottom, there are buttons for 'Complete Transaction', 'Cancel Transaction', 'Save Transaction', 'Sell Gift Card', and 'Use Reward Points'.

Consignor	Item	Price
	JEWELRY AS IS (David Yurman, men, 8, 18k Gold)	\$149.00
	UNCATEGORIZED Coupon	(\$5.00)

Current Transaction	
Discount %	0
Discount Total	\$ 5.00
Buy Total	\$ 0.00
Sell Total	\$ 144.00
Service Total	\$ 0.00
Gift Card Total	\$ 0.00
Sub Total	\$ 144.00
Sales Tax	\$ 0.00
Grand Total	\$ 144.00

Using this method will deduct a specified amount from the transaction, but the selling price of the item stays the same.

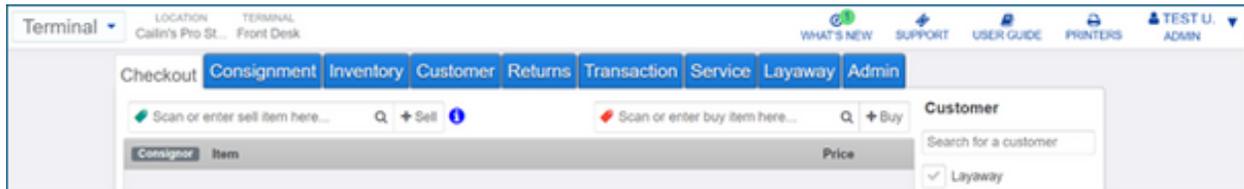
Impacts on Store Split

Stacked discounts: When an item has both an item discount and a transaction discount, the item discount is applied first then the transaction discount is applied to the already discounted price.

The store split is calculated based on the price the item sells for. Ex: If you sell a \$10 item for \$8, the split will be calculated from the \$8 selling price instead.

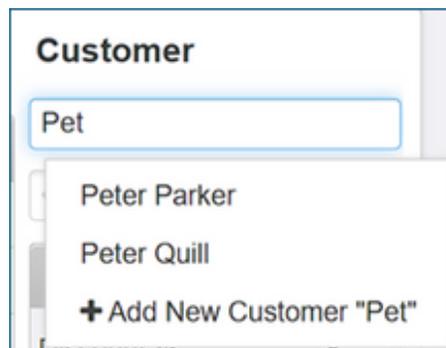
Add a Customer to a Transaction

In Terminal, navigate to the **Checkout** tab and make sure the [terminal is open](#).

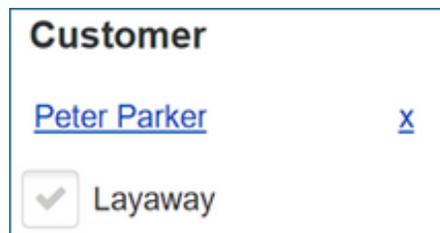


Add an Existing Customer

If you'd like to associate a customer to a transaction, start typing their name into the **Customer** field and select their name from the dropdown you'll see as you start typing.

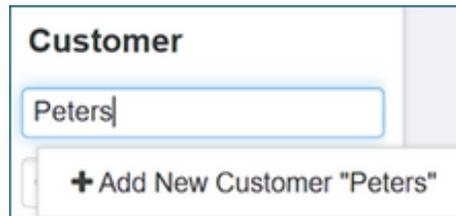


Once you have a customer selected, their name will turn blue and will be underlined.



Add New Customers

If this is a new customer, you can create an account by selecting the + **Add New Customer** option from the customer list.

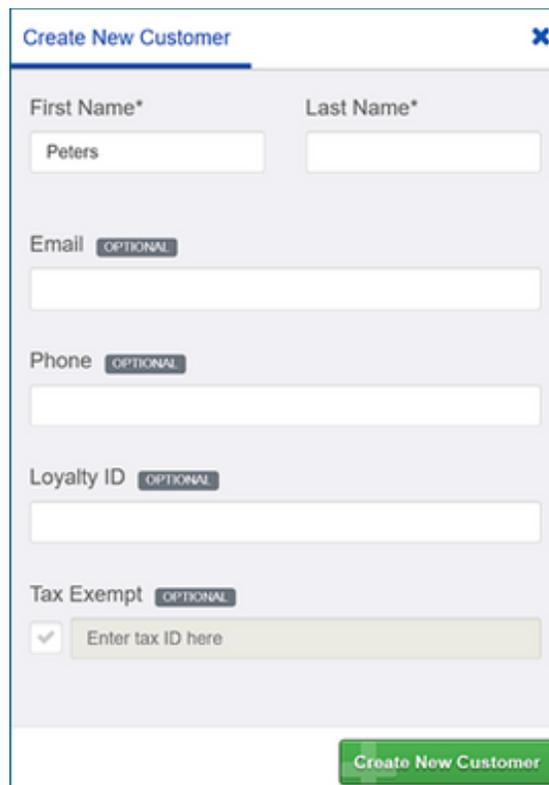


Customer

Peters

+ Add New Customer "Peters"

This will open a new window to enter Customer information. Additional details [can be added](#) later.



Create New Customer

First Name* Last Name*

Peters

Email OPTIONAL

Phone OPTIONAL

Loyalty ID OPTIONAL

Tax Exempt OPTIONAL

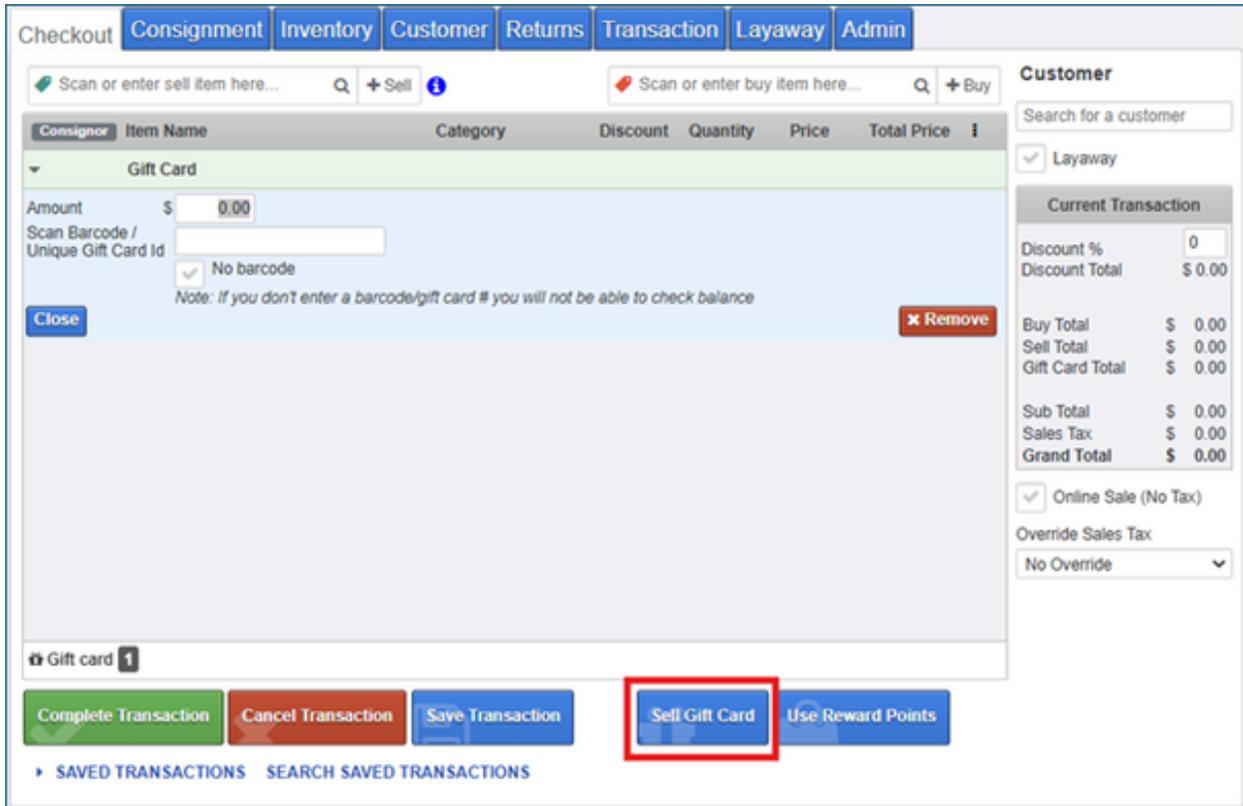
Enter tax ID here

Create New Customer

Sell a Gift Card

To sell a gift card, go to the **Checkout** tab and click the **Sell Gift Card** button.

This will add a new item to the transaction.



The screenshot shows the SimpleConsign Checkout interface. At the top, there are navigation tabs: Checkout, Consignment, Inventory, Customer, Returns, Transaction, Layaway, and Admin. Below the tabs, there are two search fields: "Scan or enter sell item here..." with a "+ Sell" button, and "Scan or enter buy item here..." with a "+ Buy" button. The main area is divided into a table for items and a right-hand sidebar for customer and transaction details.

The table has columns: Consignor, Item Name, Category, Discount, Quantity, Price, and Total Price. A "Gift Card" item is added to the table. Below the table, there are input fields for "Amount" (set to \$ 0.00), "Scan Barcode / Unique Gift Card Id", and a "No barcode" checkbox. A "Close" button is on the left, and a "Remove" button is on the right. A note states: "Note: If you don't enter a barcode/gift card # you will not be able to check balance".

The right-hand sidebar includes a "Customer" search field, a "Layaway" checkbox, and a "Current Transaction" summary table:

Discount %	0
Discount Total	\$ 0.00
Buy Total	\$ 0.00
Sell Total	\$ 0.00
Gift Card Total	\$ 0.00
Sub Total	\$ 0.00
Sales Tax	\$ 0.00
Grand Total	\$ 0.00

Below the summary table, there is an "Online Sale (No Tax)" checkbox and an "Override Sales Tax" dropdown menu set to "No Override".

At the bottom of the interface, there are several buttons: "Complete Transaction" (green), "Cancel Transaction" (red), "Save Transaction" (blue), "Sell Gift Card" (blue, highlighted with a red box), and "Use Reward Points" (blue). Below these buttons are links for "SAVED TRANSACTIONS" and "SEARCH SAVED TRANSACTIONS".

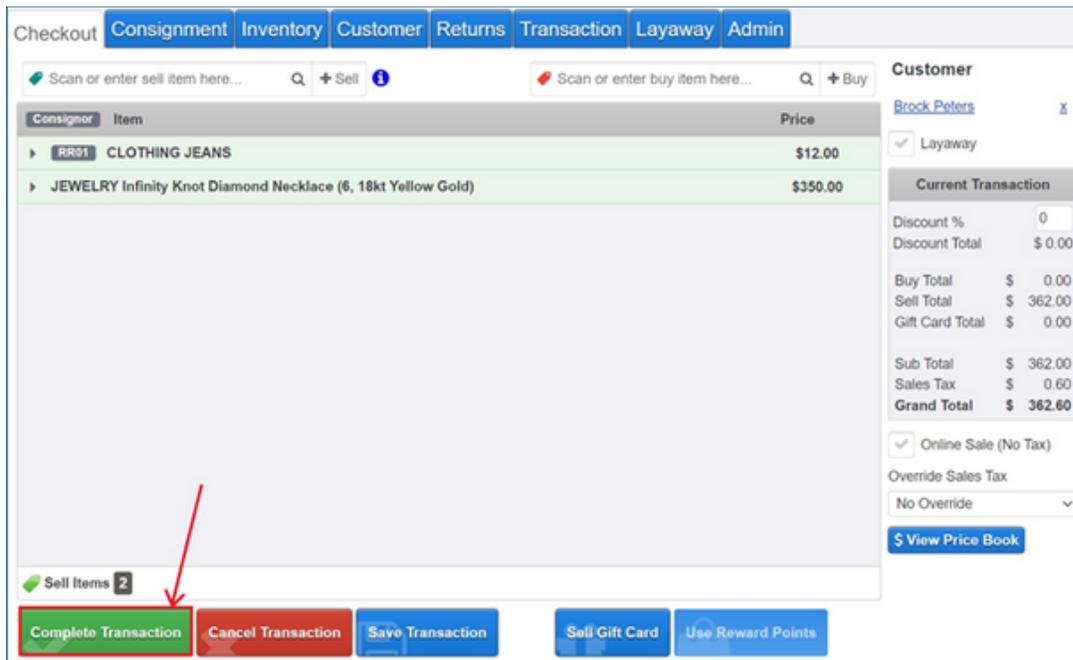
Enter the **Amount** the gift card is being sold for. Enter or scan the gift card number in **Scan Barcode / Unique Gift Card ID**.

If your gift cards do not have a unique ID and/or you do not want SimpleConsign to track gift card balances, you can check the **No barcode** checkbox.

Gift cards are not taxed and are not considered sales until they are redeemed. Once you have entered the Gift card details, you can continue to add items to the sale or complete the transaction.

Accept Payment for a Transaction

When you're ready to complete the transaction, click the **Complete Transaction** button. This will open the payment screen.



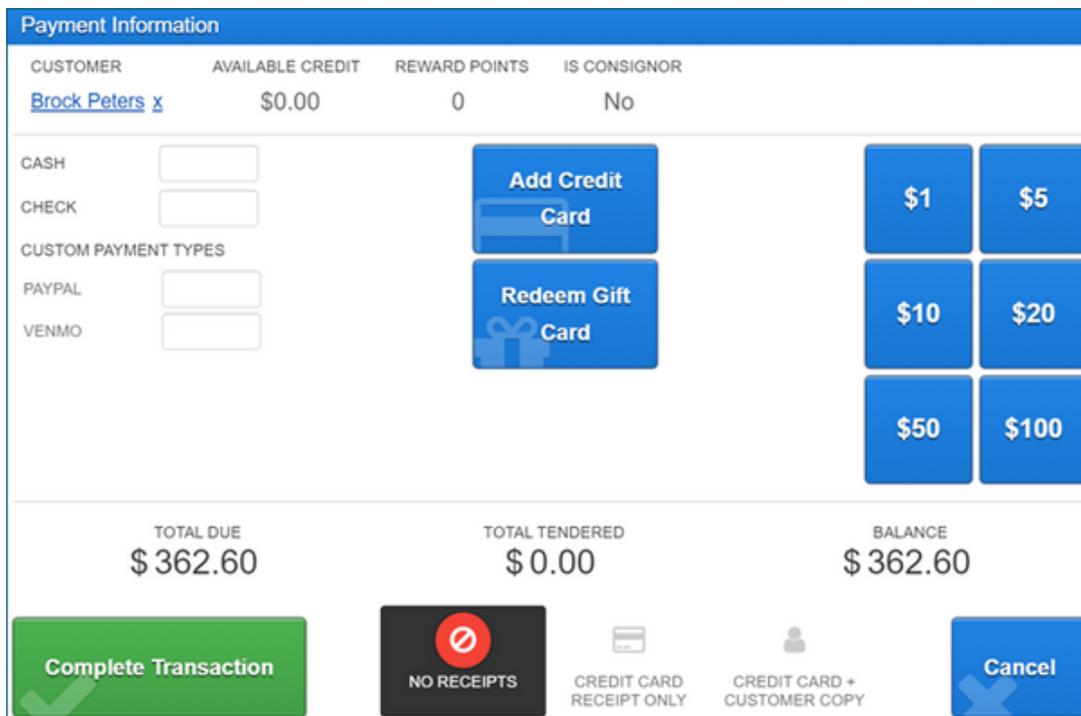
The screenshot shows the SimpleConsign interface with a navigation bar at the top containing 'Checkout', 'Consignment', 'Inventory', 'Customer', 'Returns', 'Transaction', 'Layaway', and 'Admin'. Below the navigation bar are search fields for 'Scan or enter sell item here...' and 'Scan or enter buy item here...'. A table lists items for sale:

Consignor	Item	Price
RR01	CLOTHING JEANS	\$12.00
	JEWELRY Infinity Knot Diamond Necklace (6, 18kt Yellow Gold)	\$350.00

At the bottom of the screen, a row of buttons is visible: 'Complete Transaction' (highlighted with a red arrow), 'Cancel Transaction', 'Save Transaction', 'Sell Gift Card', and 'Use Reward Points'. On the right side, there is a 'Customer' section for 'Brock Peters' and a 'Current Transaction' summary:

Current Transaction	
Discount %	0
Discount Total	\$ 0.00
Buy Total	\$ 0.00
Sell Total	\$ 362.00
Gift Card Total	\$ 0.00
Sub Total	\$ 362.00
Sales Tax	\$ 0.60
Grand Total	\$ 362.60

Choose the payment method and click **Complete Transaction**. The \$ buttons on the right are quick keys for adding cash payment.



The 'Payment Information' screen displays the following details:

CUSTOMER	AVAILABLE CREDIT	REWARD POINTS	IS CONSIGNOR
Brock Peters x	\$0.00	0	No

Payment options include CASH, CHECK, PAYPAL, and VENMO, each with an input field. There are also buttons for 'Add Credit Card' and 'Redeem Gift Card'. On the right, there are buttons for cash amounts: \$1, \$5, \$10, \$20, \$50, and \$100.

TOTAL DUE	TOTAL TENDERED	BALANCE
\$362.60	\$0.00	\$362.60

At the bottom, there is a row of buttons: 'Complete Transaction' (green), 'NO RECEIPTS' (black with a red circle), 'CREDIT CARD RECEIPT ONLY' (grey), 'CREDIT CARD + CUSTOMER COPY' (grey), and 'Cancel' (blue).

To add custom payment types, see the [Payment Type Options](#) section.

Available Credit

Available Credit is the total amount of money the customer has available to spend in store. The amount is based on customer store credit and (if they're also a consignor) consignor balance. If your company is multi-location and has **Use customer store credit** and/or **Use consignor balance across locations** enabled, then **Available Credit** will be the total amount available to spend in store across all locations. If in one location, there's a balance of (\$100.00) and another location has a balance of \$50 then the consignor will not have any available credit.

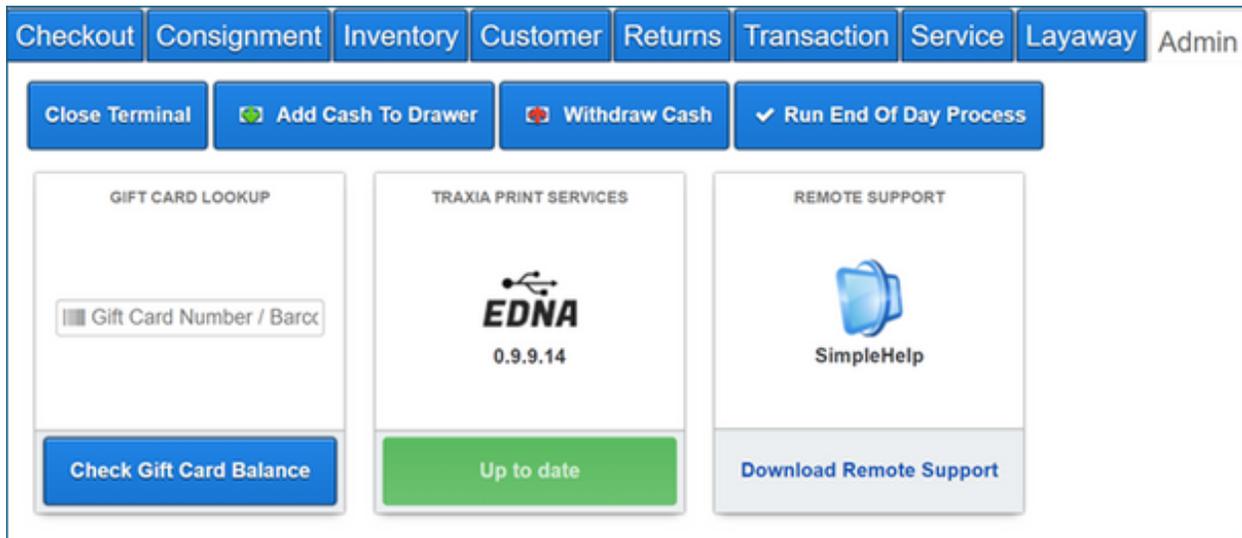
Examples:

- John Smith is a consignor with \$50 in consignor balance and the store offers 10% in additional store credit percentages. He has no money in customer store credit. His available credit would be \$55.
 - \$50 in consignor balance + \$5 in additional store credit (10% of \$50)
- Cody Martin is a consignor with \$50 in consignor balance and \$25 in customer store credit. The store does not offer additional store credit percentages. His available credit would be \$75
 - \$50 in consignor balance + \$25 in customer store credit

Check Gift Card Balance

To check the balance of a gift card that was sold in SimpleConsign, navigate to the **Admin** tab in the Terminal.

Scan the barcode or type in the gift card number in the gift card field. Then, click the **Check Gift Card Balance** button.



Void a Sale

To Void a Sale, go to the **Transaction** tab, find your transaction, and double-click it. Click the **Void Transaction** button at the bottom right and enter the REASON FOR VOID.

Invoice 2592

LOCATION J	DATE 12/20/2023	TERMINAL Front Desk	CASHIER Joe Owner	
---------------	--------------------	------------------------	----------------------	--

Type	Sku	Name	Quantity	Item Price	Cost	Discount	Price	Date
1XRC7U		WINE GLASS Wine glass 1	1	\$11.00	\$0.00		\$11.00	12/20/2023

Payments	
MC	\$ 11.00

Buy Total	\$ 0.00	Sub Total	\$ 11.00
Sell Total	\$ 11.00	Sales Tax	\$ 0.00
Service Total	\$ 0.00		
Gift Card Total	\$ 0.00	Grand Total	\$ 11.00

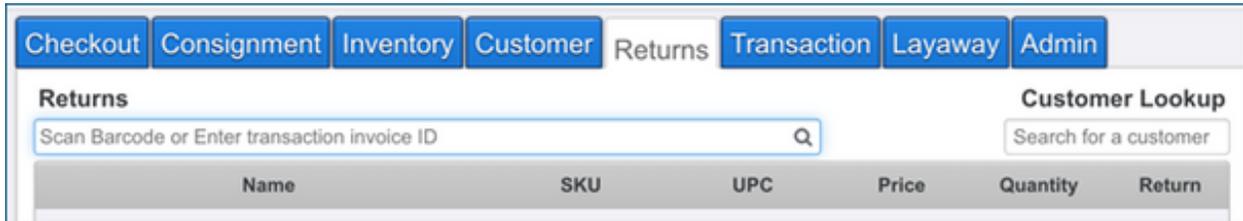
Print Receipt
 Gift Receipt

✕ Void Transaction

Important Note: You cannot Void a transaction after the End of Day Process has been completed. Instead, process the refund through the **Returns** tab.

Returns

The **Returns** tab is used to refund money for an item that has been sold.



The screenshot shows the 'Returns' tab selected in a navigation menu. The menu includes 'Checkout', 'Consignment', 'Inventory', 'Customer', 'Returns', 'Transaction', 'Layaway', and 'Admin'. Below the menu, there is a search field for 'Scan Barcode or Enter transaction invoice ID' and a 'Customer Lookup' section with a 'Search for a customer' field. A table header is visible with columns: Name, SKU, UPC, Price, Quantity, and Return.

To make a return, you must first have the receipt or the invoice number. If you do not have a receipt, you must find the invoice number.

You can find the invoice number several different ways:

- If you associated the transaction to a customer, you can find the invoice number by navigating to the [Customer tab](#), searching for the consignor, and viewing their transaction history.
- Scan the tag of the item into the search field of the [Inventory tab](#), click on the item, and then select the **View Transaction** link under the item's history.

You cannot scan the barcode/SKU in this search box. You must use the barcode on the bottom of the receipt or type in the invoice number.

Once you have the invoice number or receipt, type in the invoice number or scan the barcode on the receipt to bring up the transaction.

Checkout
Consignment
Inventory
Customer
Returns
Transaction
Layaway
Admin

Returns

Scan Barcode or Enter transaction invoice ID

INVOICE

3

DATE

12/12/2023

Customer Lookup

[Sarah Awesomesauce](#) x

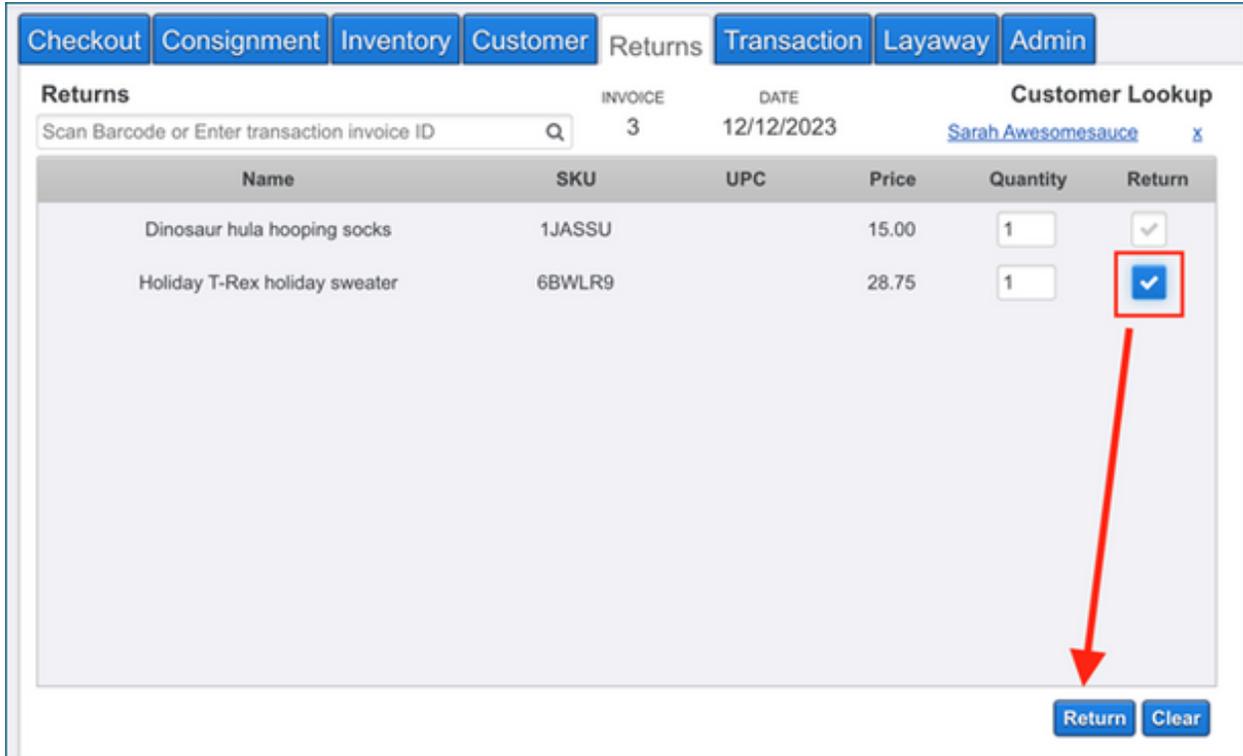
Name	SKU	UPC	Price	Quantity	Return
Dinosaur hula hooping socks	1JASSU		15.00	<input type="text" value="1"/>	<input type="checkbox"/>
Holiday T-Rex holiday sweater	6BWLR9		28.75	<input type="text" value="1"/>	<input checked="" type="checkbox"/>

Return Clear

Check the item(s) you'd like to refund and then click the **Return** button.

Store Credit Refunds

You will only be able to refund to Store Credit if you have a customer selected. If you did not add a Customer to the Transaction when making the sale, you can add them on the Returns tab to complete the refund to Store Credit.



The screenshot shows the 'Returns' tab in the SimpleConsign interface. At the top, there are navigation buttons: Checkout, Consignment, Inventory, Customer, Returns, Transaction, Layaway, and Admin. Below these, the 'Returns' section includes a search bar labeled 'Scan Barcode or Enter transaction invoice ID', and fields for 'INVOICE' (3) and 'DATE' (12/12/2023). A 'Customer Lookup' field shows 'Sarah Awesomesauce' with a clear button (x).

Name	SKU	UPC	Price	Quantity	Return
Dinosaur hula hooping socks	1JASSU		15.00	1	<input type="checkbox"/>
Holiday T-Rex holiday sweater	6BWLR9		28.75	1	<input checked="" type="checkbox"/>

At the bottom right, there are two buttons: 'Return' and 'Clear'. A red box highlights the checked checkbox for the 'Holiday T-Rex holiday sweater' row, and a red arrow points from this box down to the 'Return' button.

Input the refund amount into one or more of the refund methods and then click the **Complete Transaction** button.

Payment Information

Payout Amount: \$4.00

CASH

MC *Max: \$4.00*

GIFTCARD BARCODE/#

No Barcode

STORECREDIT

PAYOUT TOTAL **\$0.00** BALANCE **\$0.00**

*

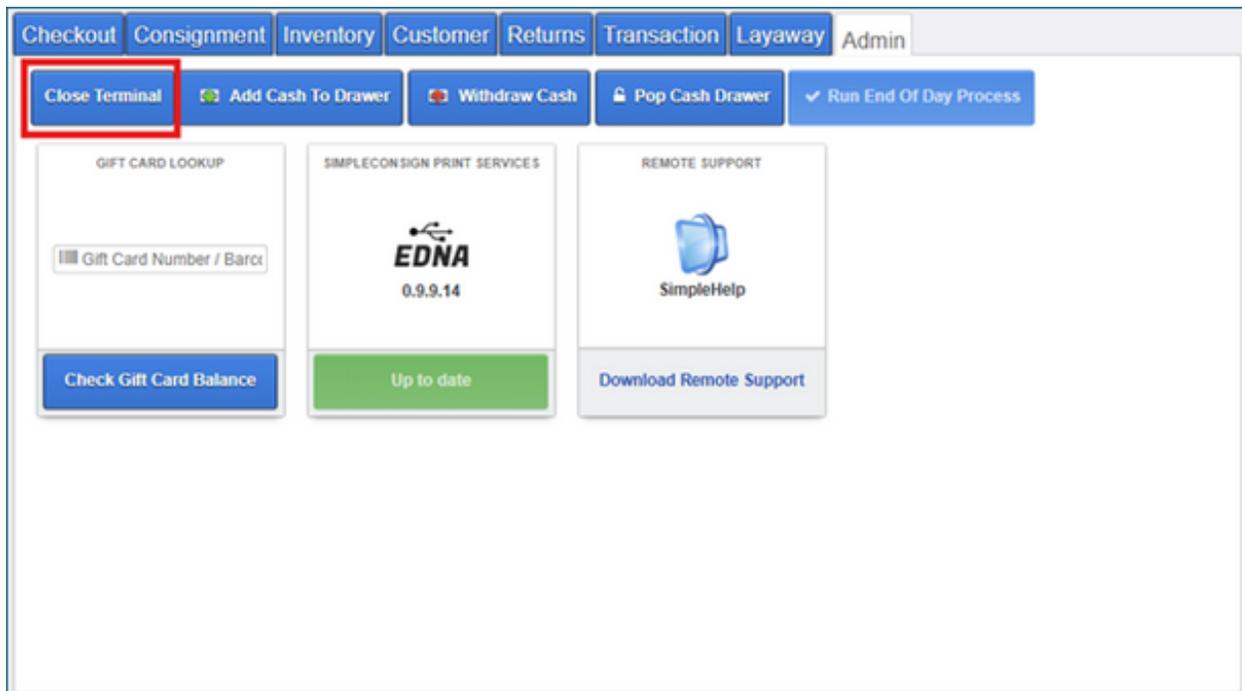
Credit Card Refunds

You will see a refund to a credit card if a credit card was used as a payment type in the original transaction.

Close a Terminal

End the Day

At the end of the day, the Terminal should be closed so the expected and actual cashflow can be reconciled. On the **Admin** tab of the Terminal click **Close Terminal**.



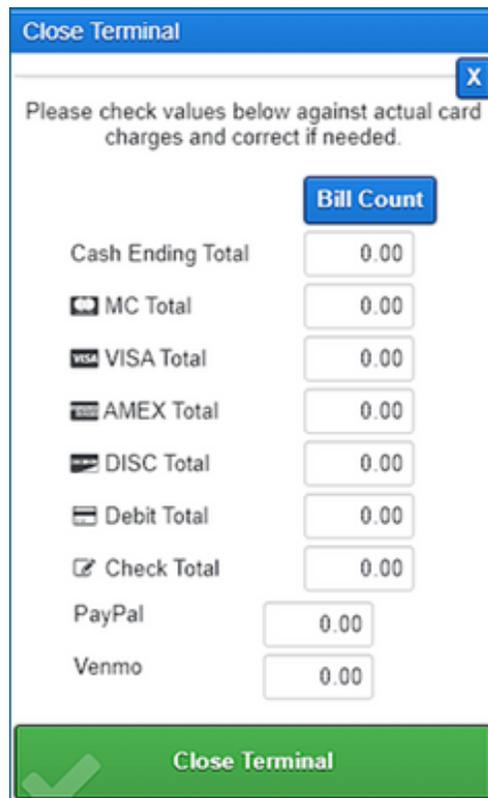
Count the Drawer

The system records your starting balance, payments, and payouts throughout the day

Counting the drawer at the end of each business day helps to reconcile this process. Enter the amount collected for each listed payment type.

The credit card totals will autofill with the expected amount, but those totals should still be checked to ensure they are accurate.

Be sure to count all cash in the drawer, including your opening amount, as it will be accounted for in the End-of-Day Process.



	Bill Count
Cash Ending Total	0.00
MC Total	0.00
VISA Total	0.00
AMEX Total	0.00
DISC Total	0.00
Debit Total	0.00
Check Total	0.00
PayPal	0.00
Venmo	0.00

Once you've entered the totals, click **Close Terminal**.

Complete the End of Day Process

End of Day Process

It is important that you run this process at the end of each day you are open for business.

This process compares your expected and actual totals. Your expected totals are calculated by SimpleConsign based on sales, payouts, returns, etc. Your actual totals are based on your drawer count when the Terminal was closed.

Ensure All Terminals Are Closed

Before the End of Day Process can be completed, all Terminals must be closed.

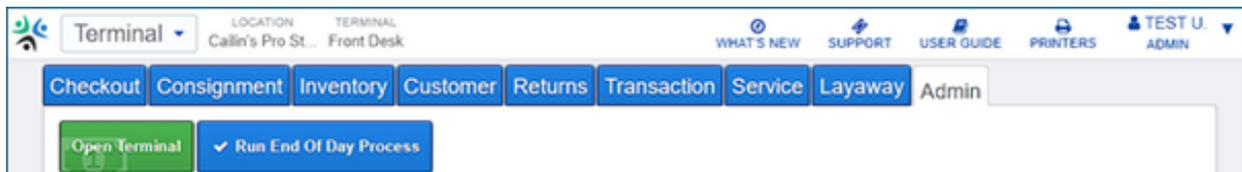
Important Note: Closing the browser tab, logging out, and shutting down the computer will not automatically close the Terminal.

Begin End of Day Process

This is a process that can be completed from either Back Office or Terminal. On the Terminal side an [override](#) can be setup that restricts the action to manager level users and above.

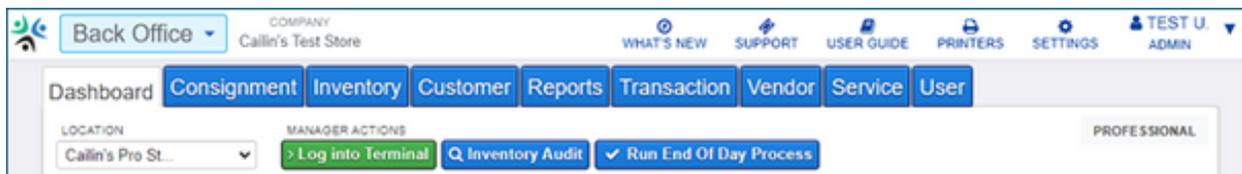
Terminal

On the **Admin** tab in any **Terminal** you'll find the option to **Run End of Day Process**.



Back Office

The option to **Run End Of Day Process** is also located on the **Dashboard** tab in **Back Office**. If you have a multi-location company, be sure to **select the appropriate location** from the dropdown first.



Complete End of Day Process

The top half of this window displays the store totals for the day. The bottom half displays a breakdown of your individual terminals.

End Of Day

Store: Cailin's Pro Store

	Expected	Actual
Cash Total	310.00	0.00
Check Total	0.00	0.00
MC Total	0.00	0.00
VISA Total	0.00	0.00
AMEX Total	0.00	0.00
DISC Total	0.00	0.00
Debit Total	0.00	0.00
PayPal	0.00	0.00
Venmo	0.00	0.00
Total	310.00	0.00
Over/Short		(310.00)

Terminal Breakdown

Front Desk (11926)

	Expected	Actual
Cash Total	0.00	<input type="text" value="0.00"/>
Check Total	0.00	<input type="text" value="0.00"/>
MC Total	0.00	<input type="text" value="0.00"/>
VISA Total	0.00	<input type="text" value="0.00"/>
AMEX Total	0.00	<input type="text" value="0.00"/>
DISC Total	0.00	<input type="text" value="0.00"/>
Debit Total	0.00	<input type="text" value="0.00"/>
PayPal	0.00	<input type="text" value="0.00"/>
Venmo	0.00	<input type="text" value="0.00"/>
Total	0.00	0.00
Over/Short		0.00

Adjust Cash In

Amount:

Note:

Adjust Cash Out

Amount:

Note:

✖
Cancel End of Day

✔
Finalize End of Day

If the Terminal is Over/Short, you can recount your cash drawer, checks, and credit card receipts. Fix anything that may be off. Click **Finalize End of Day**. If you are unable to reconcile and need to come back to the process later, choose **Cancel End of Day** instead.

Once you **Finalize End of Day**, you will not be able to alter these numbers. Be sure that they are correct before finalizing.