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***NOTE: Close any security window that pops up (McAfee, MalwareBytes, etc.)***

# Cashier Start-of-Day Process

*Note: For information about using the touch screen and the virtual keyboard, see separate document "Using the POS system touch screen".*

## ***Logging in as a cashier and Opening the Terminal***

### **Turn the computer on and log in**

1. Push the round power button on the back of the computer/monitor to turn it on. As you are looking at the screen, it is behind the upper right hand corner.
2. When the rainbow screen appears (after 15 seconds or so), put your finger on the screen and drag the rainbow screen up. This will bring you to a new sign-in screen.
3. Touch or click the password field, and use the keyboard to enter "lacsales" (all lowercase) for Terminal 1 or "LACSales" for Terminal 2. Touch or click the arrow key by the gray password field and the Start screen will appear.
4. At the Start screen, touch or click the square with **Simple Consign** in it. The Firefox internet browser starts up and displays the Simple Consign login page after around 15 seconds.



SimpleConsign  
powered by Traxia

Enter your Terminal or Manager ID and Password

Login ID T33324

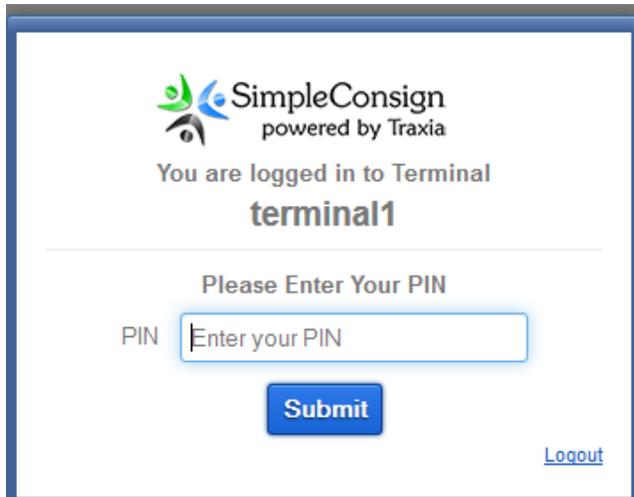
Password Your Password

Remember Login

Login

[Forgot password](#)

5. Touch or click the **Login** ID field.
6. Enter “**T33324**” for Terminal 1 or “**T74854**” for Terminal 2.
7. Touch or click the **Password** field to gain focus and enter the password with the Virtual Keyboard. The password is “**terminal1**” (all lower case) for Terminal 1 or “**terminal2**” for Terminal 2. Touch or click the **Login** button. The PIN login screen is displayed:



8. On the Terminal Login screen, touch or click the **PIN** field. Enter your PIN. If you don't know yours, you should be able to find it on the list in the cashier login folder. Simple Consign will now start up.
9. The first cashier of the day will need to open the terminal. If it is needed after login, the screen will look like this:

Checkout **Consignment** Inventory Customer Returns Transaction Layaway Admin

Consignor	Items	Price
<p><b>TERMINAL CLOSED FOR TRANSACTIONS</b></p> <p>To open, click on Admin tab, click Open Terminal button, and enter amount of cash you are opening register with</p>		

**Customer**

Layaway

**Last Transaction**  
Payout \$1.06

**Current Transaction**

Discount %

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**

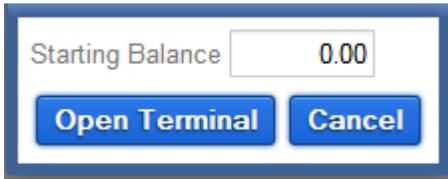
Online Sale (No tax)

Total Sell Items: 0

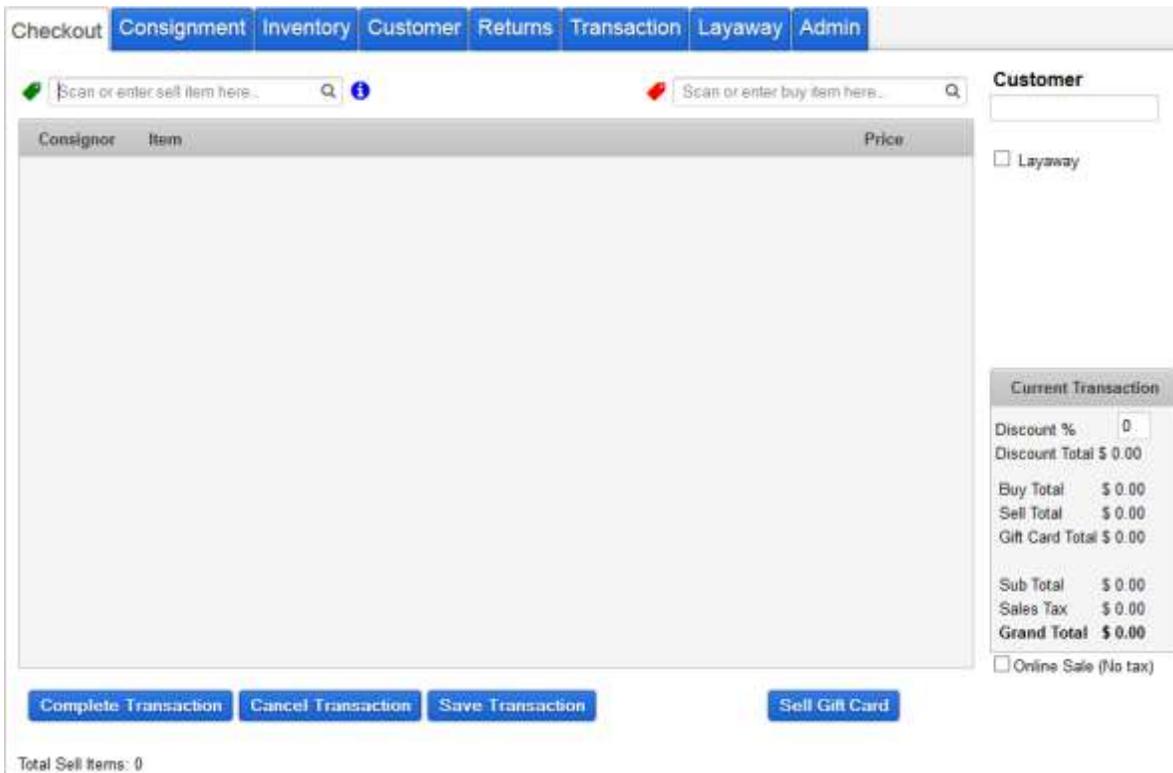
As the displayed instructions indicate, touch the **Admin** tab. This screen is displayed:



Touch or click **Open Terminal**. This screen is displayed:



Touch or click the **Starting Balance** field and enter the Cash Starting Balance calculated on the **Cash Register Start-up Tally Sheet**. Then touch or click **Open Terminal**. The **Checkout** tab is displayed:



Checkout and other Cashier Functions begin on the page following this one.

When your shift is over and another cashier is taking over for you, click on the **Change Pin/Logout** button in the upper right hand corner. The Terminal Login screen is displayed:



SimpleConsign  
powered by Traxia

You are logged in to Terminal  
**terminal1**

Please Enter Your PIN

PIN

[Submit](#)

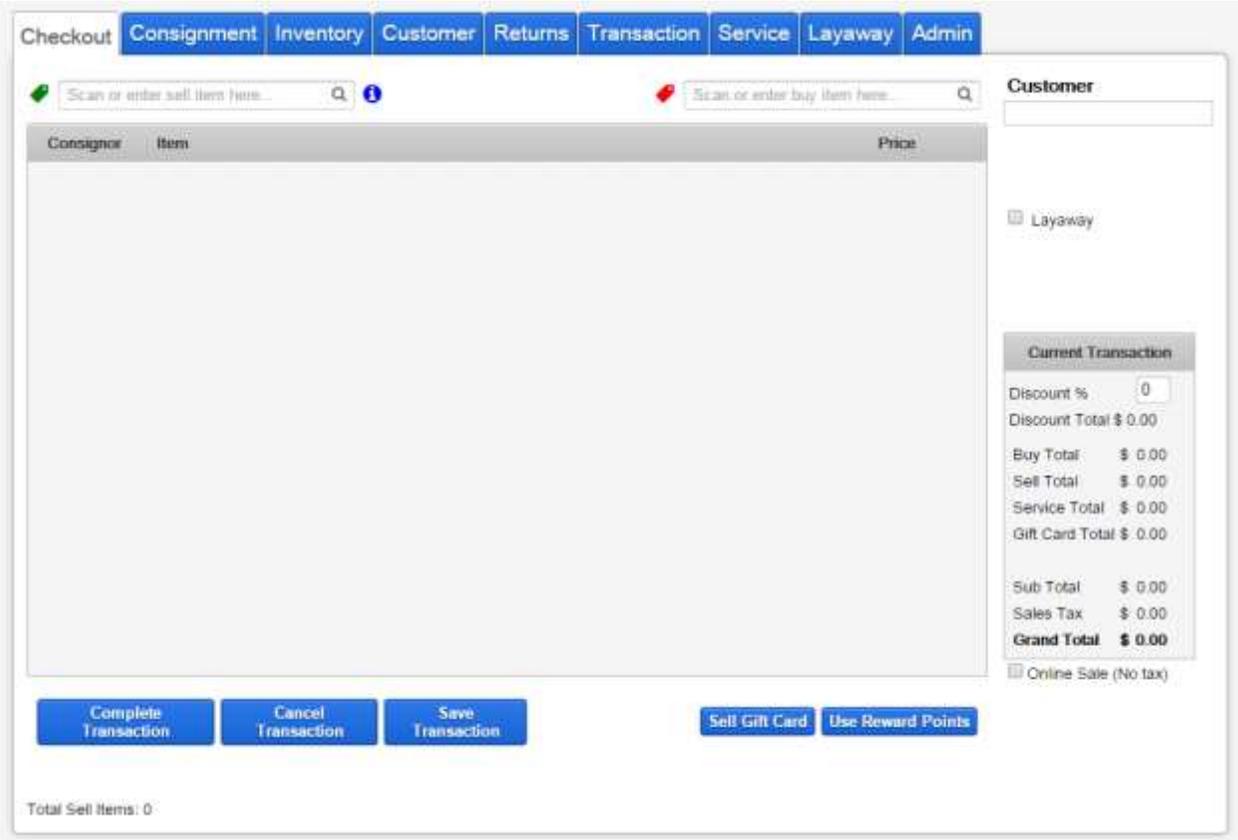
[Logout](#)

The new cashier can enter their PIN to login on the Terminal Login screen.

# Cashier Instructions for Sales Events

## Checkout Process

Log into the computer using your Cashier PIN. The Checkout screen should be displayed:



If not, touch/click the **Checkout** tab (the first tab on the left). You are now ready to enter a sale.

## Selling Items

Hold the scanner over the item's bar code and scan the item. After each item is scanned, make sure the item appears on the screen.



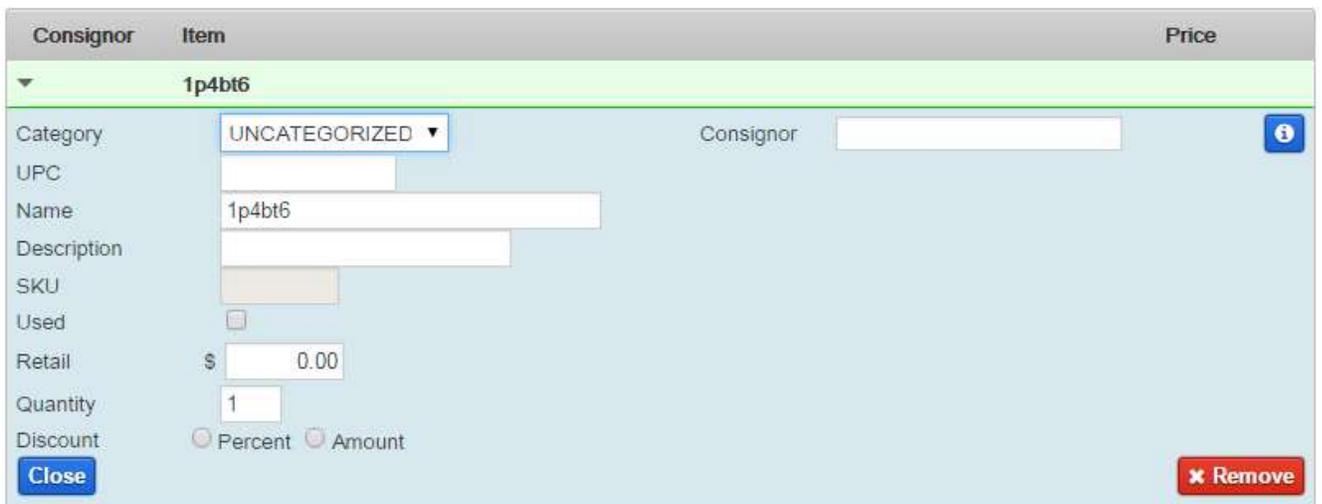
The screenshot shows a POS system interface with a navigation bar at the top containing buttons for Checkout, Consignment, Inventory, Customer, Returns, Transaction, Service, Layaway, and Admin. Below the navigation bar are two search fields: "Scan or enter sell item here..." and "Scan or enter buy item here...". The main area displays a table of items for sale:

Consignor	Item	Price
▶ 551444	Jeans	\$17.00
▶	Infinity Knot Diamond Necklace in 18KT Yellow Gold	\$405.89

Repeat for each item being sold to this customer.

## How to Handle a Bad Scan

If the scan does not recognize the item, or if the item is not available (perhaps returned or sold), the item will be shown as:



The screenshot shows a detailed view of an item that has been scanned but is not recognized. The item name is "1p4bt6". The interface includes the following fields and options:

- Category: UNCATEGORIZED
- UPC: [Empty field]
- Name: 1p4bt6
- Description: [Empty field]
- SKU: [Empty field]
- Used:
- Retail: \$ 0.00
- Quantity: 1
- Discount:  Percent  Amount
- Buttons: Close, Remove

The SKU is shown in the **Name** field. Verify that the SKU shown matches the label because sometimes the scanner does not pick up the full **6 characters** of the SKU.

- If the SKU on the screen shows less than 6 characters or it shows the wrong 6 characters, then touch/click **Remove** and rescan a second time or third time to see if the scan succeeds. If it does, then you are all set and can scan the next item.

If the second scan still does not show 6 characters, then touch/click **Remove**, using the search field at the top left, and key in the SKU located on the label under the bar code (and you can use small letters instead of caps).

b. If the SKU on the screen shows all 6 correct characters, then do the following:

- **Category:** Use the down arrow to select the correct one (including Food). If it is Needle Arts or Weavers and the item is clothing, select the Tax Exempt version.
- **Consignor ID:** Start to enter the Consignor ID from the label. Once you have entered several letters, you can select from the displayed subset:

Consignor

- Jean M. Hart Jean Hart
- Jena Duffy freed Duffy
- Jenne Rayburn Jenne Rayburn
- Jerik Tornheim Jerik Tornheim**
- Jerilyn Heinold Jerilyn Heinold
- Jewel Kuljian Jewel Kuljian
- Jean M. Hart Jean Hart
- Jerilyn Heinold Jerilyn Heinold
- Jewel Kuljian Jewel Kuljian
- Jerik Tornheim Jerik Tornheim
- Jenne Rayburn Jenne Rayburn
- Seung Hee Jeon Seung Jeon

- **Name:** Append the item description per the label to the end of the existing SKU that's already in the field.
- **Retail:** Enter the price from the label.

Consignor	Item	Price
▼ Jerik Tornheim	Turned Tree 6" 1p4bt6	\$16.00

Category	Woodworkers	Consignor	Jerik Tornheim Jerik Tornheim
UPC			
Name	Turned Tree 6" 1p4bt6		
Description			
SKU			
Used	<input type="checkbox"/>		
Retail	\$ 16.00		
Quantity	1		
Discount	<input type="radio"/> Percent <input type="radio"/> Amount		

[Close](#) [Remove](#)

When you have finished entering the information, touch/click **Close**.

## Payment Screen

When all items to be sold have been entered, touch/click **Complete Transaction** (in the bottom left of the screen). The Payment Information screen will be displayed:

The screenshot shows the 'Payment Information' screen with the following details:

- CUSTOMER:** Jennifer Weber x
- STORE CREDIT:** \$35.00
- REWARD POINTS:** 50
- IS CONSIGNOR:** No

Payment methods and options:

- CASH:** Input field
- CHECK:** Input field
- CREDIT CARD:** Add Credit Card button
- GIFT CARD:** Redeem Gift Card button
- STORE CREDIT:** Input field
- PAYPAL:** Input field

Amount buttons (right side):

- \$1, \$5, \$10, \$20, \$50, \$100

Transaction Summary:

TOTAL DUE	TOTAL TENDERED	BALANCE
\$448.26	\$0.00	\$448.26

Actions:

- Complete Transaction:** Green button with checkmark
- Print Receipt:** ON/OFF toggle (currently ON)
- Email Receipt:** OFF/OFF toggle (currently OFF)
- Cancel:** Blue button

### Notes on using the Payment Information screen:

The buttons on the right side of the screen can be used to enter cash amounts. Alternatively you can use the keyboard.

To enter a whole dollar amount (as an example, \$53.00), touch/click the \$50 button once and the \$1 button three times (\$50 plus \$3).

If you are entering dollars and cents (e.g. \$53.20) you will need to use the keyboard. Enter the total dollar and cents amount.

Ask the customer how they wish to pay: Cash, Check, Credit Card, and/or Gift Certificate.

## Payment with Cash

1. Take cash from the customer.
2. Touch/click within the **Cash** field to gain focus and enter the amount received from the customer. Review the screen for “Amount Tendered”.
3. Touch/click **Complete Transaction**.
4. The Cash drawer opens and the Receipt printer will print a receipt.
5. Give the change shown in the **Balance** field to the customer.
6. Hand them the receipt and close drawer.

## Payment with Check

1. Take check from the customer.
2. Ask customer for identification, and check that the name on the check is same as the name on the ID.
3. Write customer’s telephone number on check if it is not already there.
4. Touch/click within the **Check** field to gain focus and enter the check amount using the keyboard. Review the screen for “Amount Tendered”.
5. Touch/click **Complete Transaction**.
6. Cash drawer opens. Put check in drawer.
7. Receipt printer will print receipt. Hand customer the receipt.
8. Close drawer.

## Payment with Credit Card

1. *Check the credit card to see if it is signed. If not, then ASK for ID.*
2. Touch/click **Add Credit Card**.
3. Screen displays “Ready for credit card swipe”.
4. Swipe the card through the card reader. If the card will not swipe, then touch/click **Enter Manually**. Enter the following fields:
  - a. Customer name
  - b. Card number
  - c. Expiration month/year selected from the dropdown list
  - d. CVV2 – the 3-digit security code on the back of the card.
5. Once the swipe has been confirmed by showing the total tendered with a \$0.00 balance, click **Complete Transaction**.
6. Cash drawer opens and two receipts print out. Hand the first copy to customer to sign.
7. Once signature is confirmed, hand second copy to customer.
8. Put signed copy in cash drawer.

## Payment with Gift Certificate

1. Touch/click **Redeem Gift Card** and the **Scan Gift Card** screen will display:



Scan or Enter Gift Card Number

Scan/Enter the Gift Card's Barcode/ID

BARCODE#

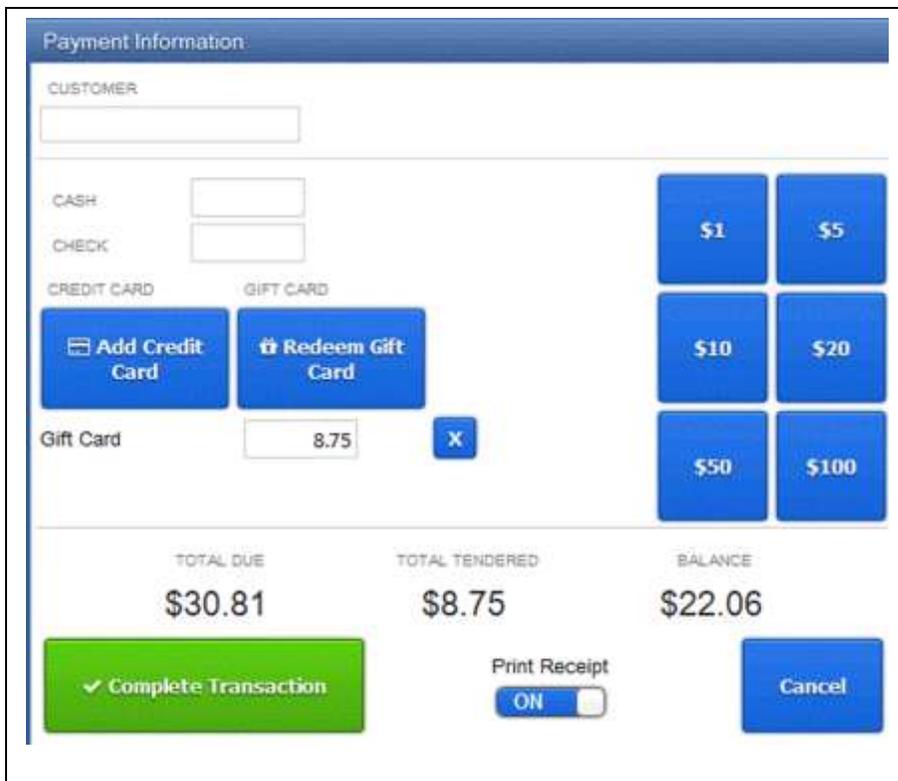
**Lookup Gift Card**

Or

**Accept Gift Card with no Barcode**

**Cancel**

2. Enter the ID of the gift certificate and click **Lookup Gift Card**.
3. The system looks up the gift certificate and enters either the full amount due or the amount left on the gift card. (In the example below, \$31.80 is due but only \$8.75 remains).



Payment Information

CUSTOMER

CASH

CHECK

CREDIT CARD **Add Credit Card**

GIFT CARD **Redeem Gift Card**

Gift Card  **X**

<b>\$1</b>	<b>\$5</b>
<b>\$10</b>	<b>\$20</b>
<b>\$50</b>	<b>\$100</b>

TOTAL DUE **\$30.81**

TOTAL TENDERED **\$8.75**

BALANCE **\$22.06**

**Complete Transaction**

Print Receipt **ON**

**Cancel**

If the balance due is zero, then proceed with the sale. Otherwise ask the customer whether the balance will be cash, credit card or check. Proceed accordingly.

Note that the system will keep track of any remaining balance on the gift certificate. If the entire remaining balance is used for the transaction, keep the gift certificate and put it in the cash drawer. Otherwise mark the gift certificate with the date and amount spent.

## ***Selling a Gift Certificate***

To sell a gift certificate, go to the Checkout tab and click the "Sell Gift Card" button:



This will add a new item to the transaction that looks like this:

Consignor	Item	Price
▼	Gift Card	\$15.00
Amount	\$ 15.00	
Scan Barcode / Unique Gift Card Id	<input type="text"/>	
	<input type="checkbox"/> No barcode	
<i>Note: If you don't enter a barcode/gift card # you will not be able to check balance</i>		
<input type="button" value="Close"/>		<input type="button" value="Remove"/>

The "Amount" field is the amount that is the denomination of the gift certificate (\$10, \$15, \$25, \$50, and \$100) and is also the selling price. The "Scan Barcode / Unique Gift Card Id" field is for entry of the unique ID of the specific gift certificate so its balance can be tracked. DO NOT ENTER THE LEADING ZEROS OF THE CERTIFICATE NUMBER. Press the CLOSE Button on the left to complete, or REMOVE on the right to cancel the entry.

Gift cards are not taxed and are not considered sales until they are redeemed. From there you can complete the transaction as usual.

## **Removing an item from the sale transaction (while it is being processed)**

If you have scanned an incorrect item, touch/click the row of the item. This displays the item details. Touch/click the red **Remove** button.

If you have scanned the same tag twice, the item is preceded by a red triangle. Again, touch the item to display its details, and then touch/click the red **Remove** button.

## If a SOLD Item is Accidentally Rescanned

The Checkout screen will look like this:

The screenshot shows a checkout interface with a top navigation bar containing buttons for Checkout, Consignment, Inventory, Customer, Returns, Transaction, 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 a table with columns for Consignor, Item, and Price. The item "BW5UDJ" is selected, and its details are shown in a form below. The form includes fields for Category (UNCATEGORIZED), UPC, Name (BW5UDJ), Description, SKU, Used (checkbox), Retail (\$ 0.00), Quantity (1), and Discount (radio buttons for Percent and Amount). A "Close" button is at the bottom left, and a red "Remove" button is at the bottom right. The Price column in the table is empty.

Consignor	Item	Price
	BW5UDJ	

Category:  Consignor:

UPC:

Name:

Description:

SKU:

Used:

Retail: \$

Quantity:

Discount:  Percent  Amount

Note that no price is shown. In this situation, touch/click the **Remove** button to remove the item from the current sale.

## Voiding a Sale

This happens when a sale has already been done, but the customer has not yet left the building.

1. Obtain the receipt, which has an invoice number on it.
2. Touch/click the **Transaction** tab.



3. Touch/click the target invoice which corresponds to the number on the receipt.
4. An invoice displays. Verify it is the correct one.
5. Touch/click the red "Void Transaction" button.
6. Enter the reason for the void using the virtual keyboard.
7. Click OK.
8. The Invoice window closes and the cash drawer opens. Void receipt prints.
9. Staple customer's original receipt to signed credit card receipt in drawer.
10. Write "voided" on signed copy.
11. Give customer voided receipt. It is the one with "VOIDED" on the top.

## Returning Items

**-- HMP ONLY** (All other sales events are final sale)

This is when a customer has bought an item at HMP and now wants to return it. This could happen on the same day or some day in the future, but any returns must be during HMP.

To start the Return, first verify that the item is in good condition. The customer must present you with the sales receipt and should have the item tag.

1. Check the method of payment from the Sales Receipt.
2. Touch the **Returns** tab on the computer and then scan the bar code on the receipt.

The list of items from that sales transaction are displayed:

The screenshot shows a software interface with a top navigation bar containing tabs: Checkout, Consignment, Inventory, Customer, Returns (highlighted with a red box), Transaction, Layaway, and Admin. Below the navigation bar, the 'Returns' section is active. It features a search input field labeled 'Scan Barcode or Enter Transaction ID' with a magnifying glass icon. To the right, 'INVOICE' is 674 and 'DATE' is 12/02/2015. A 'Customer Lookup' field is also present. Below this is a table with the following data:

Name	SKU	UPC	Price	Quantity	Return
PolyBangle6 Wide Brass	U7EZE5		24.00	<input type="text" value="1"/>	<input type="checkbox"/>
5-card Pack with envelopes	7DF665		10.00	<input type="text" value="1"/>	<input type="checkbox"/>

At the bottom right of the interface, there are two buttons: 'Return' (highlighted with a red box) and 'Clear'.

3. Using the checkboxes on the right of each row, select the item(s) to be returned.

This is a close-up of the table from the previous screenshot. The 'Return' column for the first row, 'PolyBangle6 Wide Brass', now has a checked checkbox (highlighted with a red box). The second row, '5-card Pack with envelopes', still has an unchecked checkbox.

Name	SKU	UPC	Price	Quantity	Return
PolyBangle6 Wide Brass	U7EZE5		24.00	<input type="text" value="1"/>	<input checked="" type="checkbox"/>
5-card Pack with envelopes	7DF665		10.00	<input type="text" value="1"/>	<input type="checkbox"/>

4. Touch/click the **Return** button at the bottom right. The Payment Information screen displays and appropriate fields are shown based on the original method of payment (the credit card field only shows for a credit card sale).

**Payment Information**

**Payout Amount: \$25.50**

CASH

VISA  *Max: \$25.50*

GIFTCARD

BARCODE/#

No Barcode

PAYOUT TOTAL      BALANCE

\$0.00              \$0.00

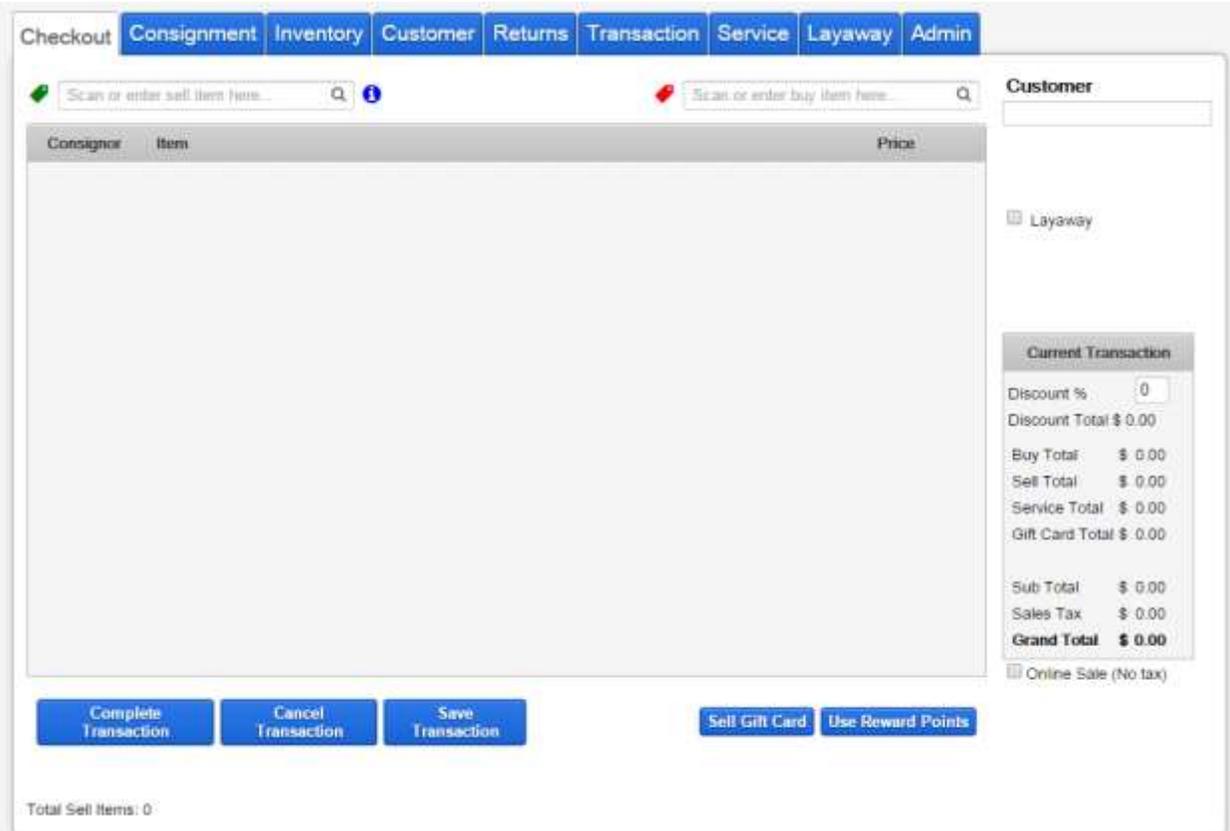
*\* A customer must be selected to give store credit.*

     Print Receipt  ON     

5. If the sale was made with:
  - a. **Credit card:** Enter the payout amount in the credit card field (**VISA** in the above screenshot).
  - b. **Cash or Check:** Enter the payout amount in the **CASH** field.
6. Click/touch the **Complete Transaction** button and the cash drawer opens and a receipt prints out.
7. On the original sales receipt, circle the returned item(s) and write “Returned” with the date of return and your initials, and give to the customer.
8. Have the customer sign the Return receipt.
9. If it is a **Cash** sale and there is enough cash in the drawer, refund their money. Otherwise:
  - a. Tell the customer that the money will be refunded via a check that will be mailed to them in a week or so.
  - b. On the Return receipt, write the customer’s name, address, and phone number so a refund check can be mailed. Circle the amount owed and initial.
10. Put the Return receipt in the cash drawer.
11. Return the item to the floor after making sure the tag is (re-)attached.

# Cashier End-of-Day Close Out Process

Cashier-on-Duty and Wrapper work together to close-out the cash drawer. Wait to be sure all customers are finished shopping before closing the terminal. Locate the **End-of-day Close Out Tally Sheet**.



1. When the sale day has finished, touch/click the **Admin** tab to start the End of Day process. This screen is displayed:



2. Touch/click **Close Terminal**. The cash drawer opens. The Cash Out screen displays:

The screenshot shows a 'Cash Out' screen with the following fields and buttons:

Cash Ending Total	<input type="text" value="0.00"/>	<b>Bill Count</b>
MC Total	<input type="text" value="0.00"/>	
VISA Total	<input type="text" value="0.00"/>	
AMEX Total	<input type="text" value="0.00"/>	
DISC Total	<input type="text" value="0.00"/>	
Debit Total	<input type="text" value="0.00"/>	
Check Total	<input type="text" value="0.00"/>	

At the bottom, there are two buttons: **Close Terminal** and **Cancel**.

3. Add up the checks and enter the sum in the **Check Total** field and on **the paper tally sheet**.

4. **Do not** count credit card slips or separate out the start-up cash.

5. Touch/click **Bill Count**. The Bills and Coin Count screen displays:

The screenshot shows a 'Bills and Coin Count' screen with the following fields and buttons:

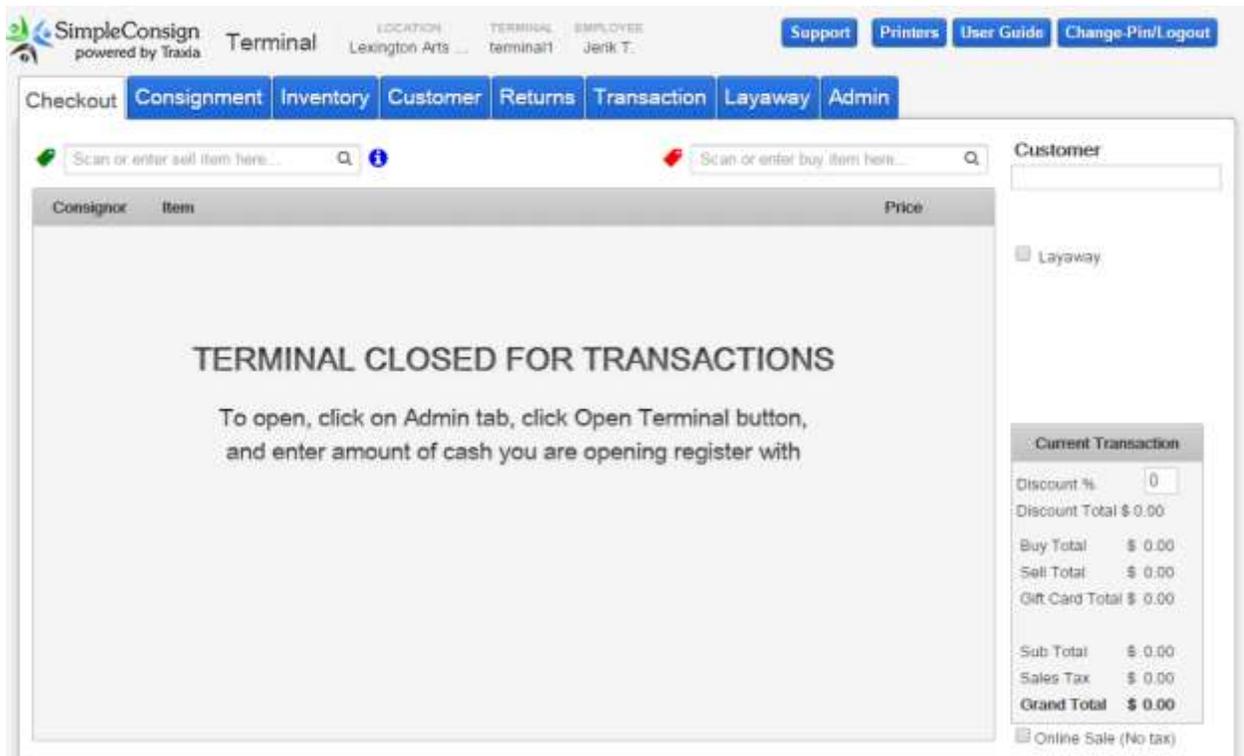
<b>Bills and Coin Count</b>		
\$100 Bills	<input type="text"/>	\$0.00
\$50 Bills	<input type="text"/>	\$0.00
\$20 Bills	<input type="text"/>	\$0.00
\$10 Bills	<input type="text"/>	\$0.00
\$5 Bills	<input type="text"/>	\$0.00
\$1 Bills	<input type="text"/>	\$0.00
Quarters	<input type="text"/>	\$0.00
Dimes	<input type="text"/>	\$0.00
Nickels	<input type="text"/>	\$0.00
Pennies	<input type="text"/>	\$0.00
<b>Total: \$0.00</b>		

At the bottom, there are two buttons: **Count Me!** and **Cancel**.

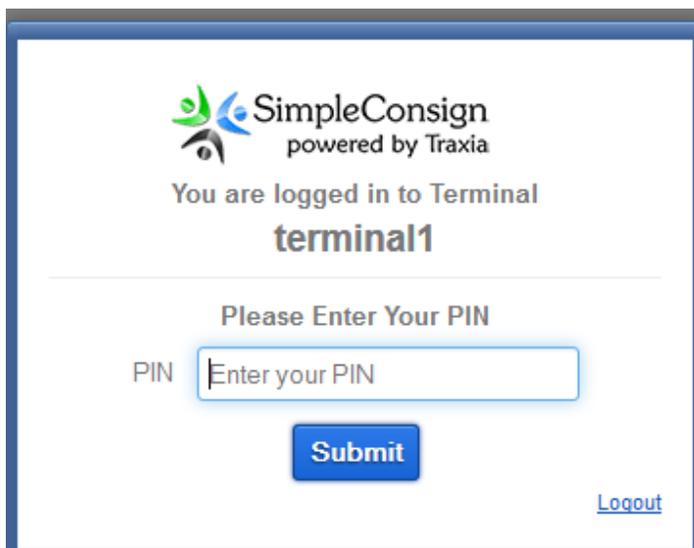
6. Count the bills and fill in each bill field.

7. Count the coins and fill in each coin field.

8. Touch/click **Count Me!**. This screen closes and the Cash Out screen redisplay, showing the total bills and coins in the first field. Write the total cash on the paper tally sheet.
9. Touch/click **Close Terminal**. The **Checkout** screen with **Terminal Closed** message displays:



10. Touch/click the **Change Pin/Logout** button at the top right. The **Terminal Login** screen displays:



11. Place all contents of the Cash Register drawer in large manila envelope. This includes:
  - Money
  - Checks
  - Credit Receipts
  - Gift Certificates, etc.
  - Completed paper tally sheet
12. Put the manila envelope through the mail slot in the Office door.