



Heirloom Software

Consign It

Point of sale for consignment shops, antique malls, and vendor malls

The Consign It POS Guide

Everything explained from the very beginning,
for people who have never used
a point of sale system before.

What's inside

Welcome	5
What a POS is, in plain words	5
The words you'll see most	5
Will it work on my computer?	7
Windows versions	7
Mac and Linux computers	7
The three ways to run Consign It	7
Equipment it works with	8
Programs it works with	8
Installing Consign It	10
What you need	10
Installing, step by step	10
Adding registers	11
Your first day: setting it up	13
1. Change the admin password	13
2. Check the tax rates and the store's commission	13
3. Set up your printer and cash drawer	14
4. Add your vendors and booths	14
5. Add your employees	14
The free trial and your license key	15
Finding your way around the screen	17
Ringling up a sale	19
Ringling up items	19
The little boxes on each row	19
Fixing mistakes	19
Helping another customer in the middle of a sale	20
Finding a sale from today	20
Fixing a sale that's already finished	20
Selling to a reseller (no sales tax)	20

Opening the drawer without a sale	20
Taking payment	21
One form of payment	21
More than one form of payment (split payment)	21
The card fee and nickel rounding	21
After you click Finalize Sale	22
Finding an old receipt or item	22
Layaways (putting money down)	23
Starting a layaway	23
Taking a payment right at the register	23
The LAYAWAY / PUT MONEY DOWN tab	24
Vendors, booths, and rent	25
Vendor and Reseller (👤)	25
A vendor's paperwork	25
Booths (🏠)	26
Collecting rent	26
Paying vendors, employees, and bills	27
Tax forms	28
Gift certificates and hold slips	29
Keeping track of inventory	30
The End of Day	31
Reports	32
Settings and hardware	34
Settings and Admin Tools (SETTINGS tab at the top)	34
Hardware Settings (⚙️)	35
Getting help	36
When something doesn't work	36

Checklists to keep by the register 38

 Every morning 38

 Every night 38

 Every week 38

 Every month 38

 Every January 38

CHAPTER 1

Welcome

Welcome! This guide explains Consign It from the very beginning, in everyday words. You don't need to know anything about computers or "point of sale" systems to follow it. Every chapter tells you **what** a screen is for, **why** you'd use it, and **how** to do it, one step at a time.

Consign It is made by **Heirloom Software LLC**. It runs a consignment shop or a vendor mall: ringing up sales, paying vendors, collecting booth rent, layaways, gift certificates, payroll, reports, and taxes, all on one computer at the counter (or several, if you have more than one register).

TIP

Read Chapters 1 through 5 before you open for business with Consign It. The rest of the chapters you can read when you need them.

What a POS is, in plain words

A **POS** (say it "P-O-S") stands for **point of sale**: the place where a customer pays. A POS system is the computer program at that spot. It adds up what the customer is buying, figures the tax, takes the payment, prints the receipt, opens the cash drawer, and remembers every sale so you can pay your vendors and do your taxes later.

In a consignment shop or a vendor mall, the things on your floor mostly belong to **vendors** (the people who rent booths or bring items in). So Consign It also keeps track of **whose** item sold, takes out the store's share (the **commission**), and works out what each vendor is owed.

The words you'll see most

Word	What it means
Register	The computer at the counter, and the REGISTER screen where you ring up sales.
Vendor	A person or business selling things in your store. Each one has a Vendor ID (like 101).
Booth	The space a vendor rents. Each booth has a number and a rent amount.
Commission	The part of each sale the store keeps (7% to start).
Consignment fee	The store's share on items sold on consignment.
Sale / transaction	One customer paying for one or more items.
Transaction #	The number a sale is filed under. It starts with the date, like 10032026-WVM42.
Receipt #	The number printed on the receipt, like WVM001-03/10/2026.
Reseller	A customer buying to resell, so they don't pay sales tax.

Word	What it means
Layaway	The customer pays part now and the rest later; you hold the items until then. Also called "putting money down."
Payout	The check you write a vendor for their sales, after the store's share and any rent owed.
Admin password	The password that protects settings and other important screens. It starts as admin123 .
License key	The code from Heirloom Software LLC that unlocks Consign It after the 30-day free trial.
Office computer	The office copy every store has: the computer that keeps the store's information. Every register uses it. It does everything except ring up sales. Its \$149 office copy key is required.
Register key	The key each register after Register 1 needs, loaded on that register - \$299 for the second register, \$224 for each one after that.

CHAPTER 2

Will it work on my computer?

This chapter lists every version of Windows (and other systems) Consign It works on, and what else it can work with. If you're not sure what your computer has, the box at the end of this chapter shows you how to find out.

Windows versions

Consign It installs from the USB stick on these versions of Windows. One program works on all of them - you don't need a different copy for each.

Windows version	Works on	Notes
Windows 11 (Home, Pro, and business editions)	64-bit (the only kind)	Windows 11 only comes in 64-bit.
Windows 10 (Home, Pro, and business editions)	32-bit and 64-bit	
Windows 8.1	32-bit and 64-bit	Install Windows Updates first (see below).
Windows 8	32-bit and 64-bit	Install Windows Updates first (see below).
Windows 7 with Service Pack 1	32-bit and 64-bit	Needs Service Pack 1 and Windows Updates (see below).

IMPORTANT

Windows 7, 8, and 8.1 need their Windows Updates installed before Consign It will start - in particular the **Universal C Runtime update (KB2999226)**, which Windows Update installs by itself. Almost every computer that has been kept up to date already has it. Windows 10 and 11 already have it built in.

It does NOT work on: Windows XP, Windows Vista, Windows 7 without Service Pack 1, Windows RT, or Windows 10 / 11 in **S mode** (S mode only allows apps from the Microsoft Store - switching out of S mode is free in the Microsoft Store and fixes it). Windows 10 and 11 computers with ARM processors run it through Windows' own built-in emulation, but this hasn't been tested.

Mac and Linux computers

The USB stick installer is for Windows. On a **Mac** or a **Linux** computer, your computer helper can run Consign It from its source code instead (the files in the "Source Code" folder), using **Python 3.8 or newer** with **Tkinter** (the part of Python that draws windows). It has been tested with Python 3.8 and Python 3.14. On a Mac that means macOS 10.9 or newer. Receipt printing and the cash drawer are Windows features, so on a Mac or Linux computer the receipt shows on screen to print by hand.

The three ways to run Consign It

Version	Who it's for	Needs
USB stick installer ("Install Consign It")	Almost everyone	Any Windows version in the table above. Nothing else to install.
Standalone program (ConsignIt.exe)	Copying to another Windows PC by hand	The same Windows versions.
Source code (consignit_app.py)	Computer helpers, Mac, Linux	Python 3.8 or newer with Tkinter, plus the packages in requirements.txt.

This guide is for **Consign It version 1.0**.

Equipment it works with

Equipment	What works
Receipt printer	Standard receipt printers that use the ESC/POS printer language: Epson TM series, Star (in ESC/POS mode), Bixolon, and most 58 mm and 80 mm thermal receipt printers. Installed in Windows like any printer.
Cash drawer	Drawers that plug into the receipt printer's drawer port (the usual kind).
Barcode scanner	Scanners that act like a keyboard (almost all USB scanners).
Card machine	Any card machine. You run the card on it and type the approval number into Consign It.
Regular printer	Any printer Windows can print to, for reports.
Several registers	Two or more Windows computers sharing one Consign It folder over your store's network.

Programs it works with

Program	What works
QuickBooks Desktop	Pro, Premier, and Enterprise, through an .IIF import file.
QuickBooks Online	Through a journal entry .CSV import file.
Google Sheets	Any web browser. Google Drive for desktop (free) makes it automatic.
Microsoft Excel	The checks ledger spreadsheet and the report exports open in Excel.
PDF viewer	Any PDF viewer (Microsoft Edge, Adobe Acrobat Reader, and others) for reports and checks.
IRS e-filing (IRIS)	Fills in the IRS's own IRIS template for 1099-MISC and 1099-NEC, to upload in the free IRIS Taxpayer Portal. The old FIRE file (IRS Publication 1220, Rev. 5-2026) works until FIRE closes on November 19, 2026.
Email	Any email account that allows sending through SMTP (Gmail with an app password, Outlook, your web host's email).

TIP

To find your Windows version, press the **Windows key** and the **R** key together, type **winver**, and press **Enter**. A small window shows the version. To find 32-bit or 64-bit, open **Settings > System > About** (Windows 10 / 11) or right-click **Computer** and choose **Properties** (Windows 7 / 8).

CHAPTER 3

Installing Consign It

What you need

- The Consign It USB stick (or the "Install Consign It" folder copied onto a USB stick).
- A Windows computer from the table in the last chapter.
- About 100 MB of free space. No internet is needed to install.
- A second, new USB stick for the backups - it stays in the office computer.

Installing, step by step

1	Plug the USB stick into the computer.
2	Open the stick: click File Explorer (the yellow folder on the taskbar), then click the USB stick on the left.
3	Double-click Install Consign It .
4	It asks what this computer is. Set up the office computer first: click This is the office computer . If it's your store's only computer, also check It's the store's only computer - then it rings up sales too. (For the registers, see Adding registers , below.)
5	Wait. A window shows it being installed, owned by Heirloom Software LLC.
6	When it says it's installed, Consign It opens by itself, and there's a Consign It icon on your Desktop and in your Start Menu. The first time it opens on a computer - and after every update - read and agree to the two notices (the License Agreement, then the Read Me First Notice): scroll to the bottom of each, check the box, and click I Have Read and Agree . Its folder has the program in Start Here , the guides in Guides , and a READ ME - What's in This Folder note.
7	Take the install USB stick out and keep it somewhere safe - it's your backup copy of the program.
8	Put the new USB stick into the office computer for the backups. Consign It finds it, names it Consign It Backup 1 , and starts saving the store's backups to it. Leave it plugged in.

TIP

Windows never starts a program from a USB stick by itself when it's plugged in - that's a protection against viruses. The one double-click in step 3 is all it takes.

To **update** Consign It later, run **Install Consign It** from the new USB stick the same way. Close Consign It first. It doesn't ask anything, and all your information stays exactly as it was. Update the office computer, and each register updates itself from it the next time it opens.

Uninstalling is not recommended - updating fixes most problems. If you must, use Windows **Settings > Apps > Consign It > Uninstall** (or **SETTINGS > ADMIN TOOLS > Danger Zone > Uninstall Consign It...**). After a strong warning, it moves all of the store's information to a **Consign Data** folder on your Desktop - don't delete it. Installing Consign It again finds that folder and offers **Bring It All Back**.

Adding registers

The **office computer** keeps all the store's information. **Every register uses the office computer's information** over your store's network. You don't need a server. Registers are numbered for you, in order: Register 1, Register 2, and so on.

On the office computer, once:

1

Open Consign It. Click **SETTINGS** at the top right, then the **ADMIN TOOLS** tab. In the **Office Computer and Registers** box, click **Share the Store's Information...**

2

Follow the steps in that window. It ends by showing a **network address**, like \\OFFICE\Consign It. Write it down.

On each register:

1

Plug in the USB stick and double-click **Install Consign It**.

2

Click **This is a register**.

3

Type the network address and click **Connect**. If Windows asks for the office computer's user name and password, type them and check **Remember my credentials**.

4

It installs and tells you its number - for example **Register 1**.

5

Register 1 is covered by the store license. On Register 2 and up, load that register's **register key** on its **ACTIVATION** tab (see the next section).

IMPORTANT

The office computer must be turned on whenever a register is being used.

Adding a register later: on the office computer, click **SETTINGS > ADMIN TOOLS > Add a Register...** - it shows the address to type on the new register and its number. **Getting a new office computer? Move the Office Computer...** (same place) packs up the store's information onto a USB stick and brings it in on the new computer - see the Plain-English Guide.

Where is everything saved? On the office computer, in the Consign It folder (%LOCALAPPDATA%\Heirloom Software\Consign It). SUPPORT has a button that opens it. Updates never delete anything - before each update, a copy goes in the **Store Backups Before Updates** folder there.

CHAPTER 4

Your first day: setting it up

The very first time Consign It opens, it shows a few one-time screens.

1

The license agreement. Scroll all the way to the bottom (that unlocks the checkbox), check the box, and click **I Have Read and Agree**.

2

The Read Me First notice. It explains how the program handles your information. Read it and agree the same way.

3

Your business information. Type your store's name, address, phone, EIN, sales tax number, email, and hours. These print on your reports and receipts. (Later, on the  Business Info screen, the EIN and sales tax number are blacked out - click one and type the admin password to see or change it.)

Then the main screen opens. Now do these few things before your first sale.

1. Change the admin password

The admin password protects your bank details, employee files, voiding sales, and Admin Tools. It starts as **admin123**, which everyone knows - so change it now.

1

Click **SETTINGS** at the top right of the screen. (Settings opens without a password.)

2

Click **Change Admin Password** and type **admin123** when it asks.

3

Type your new password.

IMPORTANT

Passwords are case-sensitive: "Dog" and "dog" are different passwords. If a red **Caps Lock is ON** warning shows while you type, press the Caps Lock key to turn it off. Write your new password down and keep it somewhere safe.

2. Check the tax rates and the store's commission

Still on **SETTINGS**: check the **State**, **County**, and **Local** sales tax rates (they're added together at checkout), the **Card Convenience Fee Rate**, and the **Store Commission Rate**. Rates are typed as decimals: **0.06** means 6%. Click **Save Settings**.

3. Set up your printer and cash drawer

Click the **gear** icon ( Hardware Settings). Check **I have a receipt printer** and pick your printer from the **Printer** drop-down (it lists the printers set up in Windows - your receipt printer is picked for you if it's there), then click **Print a Test Receipt** to make sure it prints. A **Receipt Header / Footer** window opens too - check what prints at the top and bottom of your receipts, then click **Done**. Check **I have a cash drawer** if you have one, and type the cash your drawer starts the day with in **Cash drawer starts with: \$**. Click **Save**. (Chapter "Settings and hardware" explains every box.)

4. Add your vendors and booths

Click the **people** icon ( Vendor and Reseller), then the **VENDORS** tab, and add each vendor: name, Vendor ID, **booth number** (every vendor needs one - Save won't go ahead without it), address, phone, and tax ID. A new booth asks for its rent. The **store** icon ( Assign Booths) shows every booth, its vendor, and its rent. Have them in a spreadsheet already? The  **Import Vendors from a Spreadsheet** button on the VENDORS screen (or the  **Import Data** icon - two crossing arrows) brings vendors, resellers, employees, and inventory in from Excel, LibreOffice, or OpenOffice - each with a sample sheet to fill in, which can be a LibreOffice spreadsheet linked to Consign It. The vendor form and both vendor lists go in the same order: Vendor ID, first and last name, business name, street address, city, state, zip, phone, email, booth number, and sale.  **Export Vendors...** (next to Import) saves all your vendors in a spreadsheet with the same columns, so it can be imported back in.

5. Add your employees

Click the **person** icon ( Employee Files), type the admin password (it asks right away, and the files open as soon as it's typed), and add each employee. If one of them is the manager, check **This store has a manager** at the top of the EMPLOYEES tab and pick them from the list - their name goes on the late rent letter. They'll use the **TIME CLOCK** tab at the top of the screen to clock in and out (times show the 12-hour way, like 2:30 PM). If your area has local employment taxes (a city, county, or school tax), type them once in **File and Pay It > Payroll (Weekly) > Local Employment Taxes** - every employee starts with them, and payroll takes them out.

A new employee's paperwork is on the  **EMPLOYEE DOCUMENTS** tab right next to the employee list (pick the employee, or click  **Employee Documents** on their record):

- **Application** - Consign It comes with a simple job application for someone with little work experience (or add your store's own with **Add Your Store's Application...**). **Fill Out & Print Application** asks the new employee's information once - have them type it in - and opens their **application, W-4, and I-9** together, already filled in, to finish, print, and sign. With nobody picked, it can add them as a new employee first.
- **W-4 and I-9** - the real IRS and USCIS forms, with what Consign It already knows (name, address, Social Security number, your store) typed in. They fill in the rest, you print it, and they sign it. Then put their W-4 filing status and amounts on their employee record so payroll takes out the right taxes.
- **W-2** - at the end of the year, pick the year and it's filled in from their paychecks. Check it, then print their copies.
- **State Withholding Form** - every state's form comes with Consign It. It asks which state (it starts on the employee's), and Kentucky's K-4 comes with their name, address, and Social Security number

typed in.

When a form is filled in, click **Save** in the PDF window. The completed form is kept in that employee's file - even if your PDF viewer saves it to the Downloads folder, Consign It moves it into their file for you. Scan or take a picture of each signed form and click **Add Signed...** to keep it with their record.

The work schedule: the  **SCHEDULE** tab (next to Employee Documents) makes next month's schedule as a calendar you can type in. Click **Make the Schedule (Fillable PDF)** - the month's name and all the dates are already filled in. Type who works each day and when (or print it and write it in), click **Save**, and print it. **< Previous** and **Next >** pick a different month. What you type comes out in capital letters by itself. If last month's schedule will work again, check **Last month's schedule will work this month too** before you click Make - it copies each weekday's shifts across (the 1st Monday's to the 1st Monday, and so on).

The free trial and your license key

Consign It works fully for **30 days** as a free trial. Report pages say **SAMPLE** across the middle during the trial. To keep using it, buy a license from Heirloom Software LLC:

What	Price
First register - the store license (covers Register 1)	\$599
Office copy - the office computer that keeps the store's information (every store needs one)	\$149
To start (store license + office copy)	\$748
Second register - a register key	\$299
Each register after that - a register key	\$224
From the second year - using Consign It, for the whole store (not per register), with a renewal key each year	\$700 a year
Yearly plan (optional) - support, updates, and encrypted off-site backup (coming soon)	\$120 a year

A second store front is a separate store and needs its own store license and office copy.

They send you a **license file** (it ends in .lic) for the store, one for the office copy, and one for each register after Register 1. Load the store's file on any computer, the office copy key on the office computer, and each register key on the register it's for - or on the office computer, and the register picks it up by itself. The store license and office copy can also come as one key for both. A computer without its key works during the free trial, then locks until its key is loaded.

During the free trial, the office computer can ring up sales too, so you can try everything on one computer. After its office copy key is loaded, it goes back to doing everything except sales (unless it's your only computer).

1

Click the **ACTIVATION** tab at the top of the screen.

2

Click **Load License File** and pick the .lic file - or paste the key into the box.

3

The top of the screen now says **ACTIVATED SOFTWARE** in green, and reports show your business's initials instead of SAMPLE.

The store license is good for **one year**. Each year Heirloom Software LLC sends a **renewal key** - load it the same way. The ACTIVATION tab shows the date it's good through, and for the last 30 days Consign It reminds you. If the date passes without the renewal key, Consign It locks until it's loaded (nothing is lost). Register and office copy keys never run out.

If a key is ever cancelled (for example, one made with the store's name spelled wrong), the ACTIVATION tab says so - load the new key Heirloom Software LLC sends you.

CHAPTER 5

Finding your way around the screen

The main screen has four parts.

Across the top are the gray tabs, in small letters: **REGISTER** (ringing up sales), **LAYAWAY / PUT MONEY DOWN** (every layaway), and **ACTIVATION** (your license). At the far right of that same line are five more small tabs:

Top tab	What it opens
REPORTS	Every report, plus Vendor Documents - each vendor's application, W-9, and 1099s (opens full screen)
TIME CLOCK	Clock in and out
SETTINGS	Settings, with Admin Tools as its second tab
INVENTORY CONTROL ▼	A drop-down menu: Current Inventory, Import Inventory (Excel, LibreOffice, CSV), or Add or Update Items by Hand - each opens its own window
SUPPORT	Help, the guides, and the suggestion box (opens full screen)

Down the left side is a strip of glossy colored icons. Each one opens its own window. Click it again and the window just comes to the front.

Icon	What it opens
 gear	Hardware Settings - printer, cash drawer, card machine, scanner, receipts
 building	Business Info - your store's details (no password) and the checks spreadsheet (asks for the password)
 receipt	File and Pay It - pay vendors, pay employees, write checks, 1099s and W-2s, tax forms, and sending 1099s to the IRS (asks for the admin password)
 gift	Gift Certificates / Hold Slips (opens full screen)
 people	Vendor and Reseller - vendor lookup, records, promotions, resellers, vendor reports
 store	Assign Booths
 person	Employee Files - your employees and their paperwork (application, W-4, I-9, W-2, state form), and the Not Required to Complete U.S. Tax Forms tab
 two crossing arrows	Import Data - boxes (Vendor, Reseller, Employee, Inventory, Booth Assignments and Rent) to bring in vendors, resellers, employees, a vendor's inventory, and booths from a spreadsheet (Excel, LibreOffice, OpenOffice, or CSV). If a sheet's columns are under the wrong headings, Check the Columns lets you fix them first.
 arrow pointing down	Recommended Companion Software - free LibreOffice and Firefox, each with a Download & Install button (needs the internet)

Along the bottom is the **Rent Payment** check box - check it to collect a vendor's rent.

In the middle is whatever screen you're working on - most of the time, the REGISTER.

TIP

Hold your mouse over a sidebar icon for a second and a little label tells you what it opens.

TIP

Right-click any box to **Cut**, **Copy**, or **Paste** (Ctrl+C and Ctrl+V work too). **Enter** works like a click on the button you've Tabbed to, and opens a highlighted row in a list. Dollar amounts get their decimal point by themselves: type 25 and it becomes 25.00.

TIP

As you type a word, suggested words show in a little strip under the box (from the third letter, changing as you type) - click one to finish the word or fix a typo (**FURNAT** shows **FURNITURE**). Click **Add to Dictionary** if your word is right (a name, say). It knows your vendors', resellers', and employees' names already, and never bothers you about prices, phone numbers, emails, or passwords. Turn it off in **SETTINGS > Spelling**.

Every window fits on your screen - nothing is hidden under the taskbar at the bottom. If a screen has more on it than fits, it scrolls.

CHAPTER 6

Ringing up a sale

This is what you'll do most. The REGISTER screen looks like a spreadsheet: each row is one item.

Ringring up items

1	Click in the Vendor ID / Booth # box on the first row and type the vendor's ID (like 101). Their booth number fills in by itself.
2	Press Tab to move to Item # and type the item number - or scan its barcode.
3	Type a short Description (like OAK CHAIR).
4	Type the Price . Only numbers can be typed, and it turns into money by itself (45 becomes 45.00).
5	Change Qty if there's more than one.
6	Press Enter (or Tab) in the Qty box and a new row appears for the next item.

The total at the bottom right updates as you go: **Subtotal**, **Tax**, and **Total**.

The little boxes on each row

- **C%** - the item is on consignment (the consignment fee comes out of the vendor's share).
- **Sale** and **D%** - give a discount on this item. If the vendor is running their own sale, the discount fills in by itself.
- **Tax / Exempt** - whether this item is taxed.

Fixing mistakes

- **Delete Selected Row** - takes off the last item.
- **Void Sale** - clears the whole sale (asks first).
- **Recalculate** - adds everything up again.

Helping another customer in the middle of a sale

Click  **Hold This Sale**. The sale is set aside (up to 10 at once) and the register is clear for the next customer. A small car button appears - click it to bring the held sale back. You can also use the six **Transaction** tabs above the grid to keep several sales open at once.

Finding a sale from today

Click the **Find Today's Transactions** tab (right after Transaction 6) and open the **Transaction Look Up** drop-down - it lists every sale from today, newest first. Pick one and it opens in a register screen, where you can fix it or print it again (see **Fixing a sale that's already finished**). For older sales, use the **Find a Receipt or Item** box at the top of the register - fill in any one box (or several) and press Enter; part of a number or word is enough. While you type a transaction or receipt number, matching ones drop down under the box - click one.

Fixing a sale that's already finished

Wrong price, wrong vendor, or a forgotten item? Open the sale (from **Find Today's Transactions**, or double-click it in **Find a Receipt or Item**). It comes up in a register screen with its items on the grid. Fix what's wrong, then click **SAVE CORRECTION** and type the admin password. If the new total is more, take the difference on the payment screen; if it's less, Consign It asks how you're giving it back (cash, card, or back on their gift certificate). The money counts on today's End of Day Report, and you can print a **CORRECTED RECEIPT**.

IMPORTANT

Held sales aren't paid for. Finish or void them before you close for the day - the End of Day check will remind you.

Selling to a reseller (no sales tax)

Check the **Reseller** box at the bottom of the register and pick the reseller from the list (or add a new one). The whole sale becomes tax-exempt, and the reseller's name and tax number print on the receipt.

Opening the drawer without a sale

No Sale (Open Drawer) opens the cash drawer - for making change, for example.

CHAPTER 7

Taking payment

When everything's rung up, click **CHECK OUT** (the red button). The payment screen opens.

One form of payment

1	Click how the customer is paying: Cash , Check , Card , Gift Certificate , or a digital payment like Cash App , Venmo , Apple Pay , or PayPal .
2	Fill in what it asks for: the card's approval number from your card machine, the check details, or the gift certificate number.
3	For cash, type what the customer hands you - the Change due shows in green.
4	Click Finalize Sale .

More than one form of payment (split payment)

Say the customer puts \$40 on a card and pays the rest in cash.

1	Check Split payment . The amount box empties and a second line appears.
2	Pick Card and type 40 as the amount.
3	The second line shows Still owed in red. Pick Cash and type what they hand you.
4	Click Finalize Sale . (Changed your mind? Uncheck Split payment.)

You can use up to four forms of payment on one sale. **Finalize Sale** always stays at the bottom of the screen; if the payment lines don't all fit, they scroll.

The card fee and nickel rounding

- If a card is used anywhere in the sale, a **card convenience fee** (3% to start) is added on the **whole** sale. Check **Waive Card Fee** to skip it.
- Totals round **up** to the nearest nickel (so \$10.02 becomes \$10.05), unless your store turns on **Penny Usage** in Hardware Settings.

After you click Finalize Sale

1

A **Total Breakdown** shows what made up the total and how it was paid.

2

The cash drawer opens.

3

Consign It asks **Does the customer want a receipt?** Click **Customer Copy Only**, **Store Copy Only**, **Both Copies**, or **No Receipt**. The receipt preview says whether it printed - and if it didn't, why (like no receipt printer found).

4

A **Sale Complete** message shows the total and any change due.

TIP

Reseller sales don't ask - both copies print by themselves, and the store copy says **KEEP FOR TAXES** at the top and bottom. File it with your sales tax papers.

Finding an old receipt or item

On the REGISTER screen, type a receipt number, transaction number, item number, or a word from the description (like LAMP) into the **Find a Receipt or Item** box and press **Enter**. The full search screen can also look for a **price range** (from \$10 to \$25, say). Select a result and click **View / Reprint Receipt** to see it again or print another copy - or double-click it to open it in a register screen to fix it.

CHAPTER 8

Layaways (putting money down)

A layaway lets a customer pay part now and the rest later. You hold the items until they're paid off.

Starting a layaway

- 1 Ring up the items and click **CHECK OUT**.
- 2 Click the **Layaway / Put Money Down** tab on the payment screen.
- 3 Type the customer's **name** and **phone**. The **Pick up by** date is 30 days away - change it if you agree on another date. The **address** is optional; it's used for a reminder letter if they're late.
- 4 Pick how they're paying and type the **money down**.
- 5 The screen shows **COLLECT NOW** in red: the money down plus a **\$1.00 layaway fee** (and the card fee on the whole sale if they pay by card).
- 6 Click **Start Layaway / Put Money Down**.

An **ON HOLD** slip prints with the customer's name, the layaway's ID, the date, the pick-up date, and the balance. Keep the store copy with the items.

Taking a payment right at the register

- 1 Check the **Layaway Payment** box at the bottom of the REGISTER screen.
- 2 Find the layaway in the list (type a name or phone) and double-click it. Everything about it shows in the box: customer, phone, pick-up date, total, paid, and balance.
- 3 Click **Take Layaway Payment** - or **Pick Up (Complete Sale)** if the customer is taking the items home today.

The LAYAWAY / PUT MONEY DOWN tab

This tab at the top lists every layaway. Late ones show in red as **OVERDUE**. Select one and use **Take a Payment**, **Pick Up (Complete Sale)**, **Reprint Slip**, **Edit Customer Info**, or **Cancel Layaway** (admin password; the items go back in stock).

TIP

Once a month, run **Delinquent Layaway Letters** under REPORTS to print a polite reminder letter for every overdue layaway.

CHAPTER 9

Vendors, booths, and rent

Vendor and Reseller (👤)

The Vendor and Reseller window has these tabs:

- **VENDOR LOOKUP** - find any vendor fast. Its columns: Vendor ID, First Name, Last Name, Business Name, Street Address, City/State/Zip, Phone, Email, Booth Number, Sale - the same as the list on VENDORS.
- **VENDORS** - add or change a vendor's information, in the same order (Booth Number and the Vendor Sale / Promotion box come right after Email). The  **Save Vendor** button is always at the bottom of the form;  **Import Vendors from a Spreadsheet** and  **Export Vendors...** are at the top right.
-  **PRINT APPLICATIONS** - pick from the **Print:** drop-down. **Apply to be a Vendor** prints a blank vendor application. **Vendor Contract** - type the vendor's information once (name, business, tax classification, SSN or EIN, address, phone, email, booth, rent, start date); it's saved to their record and W-9, and **Save and Print the Contract and W-9** opens both, filled in, to print and sign. (Heirloom Software will attach the vendor application and contract later; until then you can add your own.)
- **VENDOR PROMOTIONS** - a vendor's own sale (like 20% off) between two dates. It comes off their items automatically at checkout.
- **OLD VENDORS** - vendors you've deleted (their records are kept).
- **RESELLER INFORMATION** - your resellers.
- **REPORTS** - every vendor and booth report. Pick one from the **Report** drop-down list and click **Run Report**.
- **SET LATE FEE** - the late fee (\$25 to start). Type a new amount and click the blue **Click here to change the late fee everywhere** link - it changes everywhere at once. This is also where the **late rent letter** is: your letter, filled in with the vendor's name, rent, due date, today's date, the late fee, and the store's name, phone, and email, signed by the manager (if you picked one), emailed automatically at 9:00 PM to every vendor whose rent still isn't paid 5 days after it's late (the 16th), once a month. **Preview a Letter...** shows one; **Send Late Rent Letters Now** sends them today. Email has to be set up in SETTINGS first.

A vendor's paperwork

Click **REPORTS** at the top, then the **VENDOR DOCUMENTS** tab (or click **Vendor Documents** on the vendor's record). Pick the vendor.

- **Application** - add your store's own blank vendor application once (**Add Your Store's Application...** - a fillable PDF is best). Then **Fill Out & Print Application** makes the vendor's copy to fill in, print, and sign. With no vendor picked, it prints a blank one for someone who's just applying.
- **W-9** - the IRS form, with the vendor's name, address, and tax number (if you have it) already typed in. They fill in the rest, you print it, and they sign it. You need a signed W-9 from each vendor for their 1099.

- Scan or take a picture of the signed papers and click **Add Signed Application...** or **Add Signed W-9...** to keep them with the vendor.

Booths

Click **Assign Booths**. Type a booth number (like 12 or 12-A), the vendor who rents it, the rent, how often it's due (weekly, every two weeks, or monthly), and any notes. Click **Assign / Update Booth**. It says Saved, clears the boxes, and stays open for the next booth. If that vendor isn't set up yet, it takes you straight to the Vendors screen with their Vendor ID and booth number filled in - add them there and click **Save Vendor**, and they're put in that booth at that rent.

Import Booth Assignments and Rent... brings booths in from a spreadsheet (Booth #, Vendor ID, Rent, Frequency, Notes).

The **RENT BREAKDOWN** tab lists every vendor, their booths, and the rent for each booth - what it is, how often, and what it comes to a month and a year - with the store's total.

Collecting rent

Check **Rent Payment** at the bottom of the screen. The Collect Rent window opens - pick the vendor and take the payment. Close the window when you're done (the box unchecks itself). A **\$25 late fee** is added after the 10th of the month. Clicking **Record Payment** prints the vendor's receipt on the receipt printer by itself, and a payment that includes the late fee says so on the vendor's rent record and receipt ("Late fee \$25.00 paid" and the date). Any rent a vendor still owes is also taken out of their sales automatically before they're paid.

CHAPTER 10

Paying vendors, employees, and bills

Click the **receipt** icon (🧾 **File and Pay It**). Everything that pays someone or files with the government is in this one window - it asks for the admin password and opens full screen, on **Pay Vendor > Monthly**.

- **Pay Vendor > Monthly** - pays every vendor for last month's sales in one click. A PDF of all the checks opens for you to look over before anything is final.
- **Pay Vendor > Separately** - pays one vendor.
- A vendor's check says **Pay for** and last month as MM/YYYY on its Memo ("for") line - for example **Pay for 09/2026** - with any rent taken out on the line under it.
- **Payroll (Weekly)** - pays your employees from their time clock hours, with tax withholding worked out for you - including up to three **local employment taxes** (a city, county, or school tax). Type their names and rates in the **Local Employment Taxes** box at the top and click **Put These on Every Employee**; each employee's record has the same three spots.
- **Write a Check (Other)** - any other bill (supplies, electric, rent...). Type who it's for, your **Account Number** with them if you want it on the check (optional), and the amount. You pick a category, and it goes on that page of the checks spreadsheet.

No vendor or payroll check prints without an SSN, TIN, or EIN. If a vendor or an employee doesn't have a complete one on file (all 9 digits), Consign It won't make the checks - it tells you who to fill in first.

The admin password box opens File and Pay It the moment you finish typing the right password - no need to click OK.

- **Yearly Forms** - 1099s for vendors paid \$600 or more, and W-2s for employees.

TIP

On the 1st of every month, the **Vendor Pay Report** prints by itself, showing what each vendor's check will be. Look it over before you write the checks.

CHAPTER 11

Tax forms

Click the **receipt** icon (📄 File and Pay It), then its **TAX FORMS** tab, to open or print a blank copy of any tax form: the W-9, 1099-NEC, W-4, W-2, and I-9, and your state's withholding form (pick the state from the list - every state is there).

Each new tax year, check **Download the new tax forms** (the admin password is needed). Consign It warns you that it's about to go online - don't do it while customers are checking out. Or check **Wait - download them tonight at 9:00 PM** first, and they'll download when the nightly emails go out.

Sending 1099s to the IRS online: the IRS's free system for it is called IRIS. (It replaces the old FIRE system, which closes November 19, 2026.)

1

Once, well before January, click **Apply to E-File with the IRS...** and fill out the IRS's application - it can take up to 45 business days. When the IRS approves you, type the code it gives you (5 letters and numbers) in **Your IRIS TCC** and click **Save**.

2

Each January, click **Send 1099s to the IRS...**, pick the year, and follow the 4 steps on the screen: Consign It checks your vendors, you download the IRS's blank form file in their portal, Consign It fills it in, and you upload it back in the portal.

Not required to complete U.S. tax forms? If your business is outside the United States, or a CPA does your tax paperwork, check the box at the bottom of the TAX FORMS tab (or on the **NOT REQUIRED TO COMPLETE U.S. TAX FORMS** tab in Employee Files). By checking it you agree to this statement: "By checking this box, I, the business owner, agree that I am stating that I am not required to file these U.S. tax forms through Consign It, because my business is located outside of the United States or I am using a CPA to do this paperwork." It turns off every U.S. tax form in Consign It. Uncheck it (in Employee Files or SETTINGS) to turn them back on.

CHAPTER 12

Gift certificates and hold slips

Click the **gift** icon (). The screen opens full screen.

- **Gift Certificates** - set the starting number once, then fill in who bought it, who it's for, the amount, and the date it's good until. A certificate prints with a customer copy and a store copy on one page (cut them apart on the dashed line marked with scissors and CUT HERE), each with its certificate number on it.
- **Hold Slips** - a slip for an item a customer has paid for but will pick up later.

A customer pays with a gift certificate by choosing **Gift Certificate** on the payment screen and typing its number. If it doesn't cover the whole sale, Consign It offers to take the rest another way.

CHAPTER 13

Keeping track of inventory

Click **INVENTORY CONTROL ▾** at the top of the screen and pick from the menu: **Current Inventory** (everything on file and how many are in stock), **Import Inventory (Excel, LibreOffice, CSV)** (bring in your whole inventory from a spreadsheet, or one vendor's items with **Import Vendor Inventory** - pick the vendor from the list and every item goes to them), or **Add or Update Items by Hand**. Each opens its own window. When an item sells, its quantity in stock goes down by itself. Inventory is never required - anything not entered can still be rung up by hand.

CHAPTER 14

The End of Day

Do this every night before you go home.

- 1** Click the red  **CLOSE OUT (End of Day)** button on the REGISTER screen (at the right of the Find a Receipt or Item line) - or **REPORTS** (top right), then **Print End of Day Report**.
- 2** If it lists **unfinished sales** (held sales, or items rung up but never paid), click **No**, go finish or void them, and start again.
- 3** The cash drawer opens by itself. (If it doesn't, open it with its key.)
- 4** Take out the **starting cash**, count it, type the amount and your name, check the box, and click **Verified - Make End of Day Report**. The starting cash isn't part of the day's deposit.
- 5** From **CLOSE OUT**, the End of Day Report and the deposit slip print by themselves (on your report printer). From **REPORTS**, the report opens as a PDF to look over first. It shows what the computer says you took in - cash, checks, cards, digital payments, gift certificates, sales tax, and layaway money - with blank lines to write what you counted, and a list of every check.
- 6** Count the drawer, write your counts on the report, and compare the card total with your card machine's report.
- 7** Print it. **The last page is your bank deposit slip** - a bank copy and a store copy (cut them apart on the dashed CUT HERE line with the scissors), already filled in with the day's cash and each check, plus your bank's name, address, and account. If your count is different, fix the amounts on the slip. Take the bank copy to the bank with the money, and file the report with the store copy.

IMPORTANT

Leave Consign It open **on the office computer** until after **9:00 PM** (the registers never do these). That's when it emails vendors their daily sales (and, from the 16th, the late rent letter to any vendor whose rent is late), sends any suggestions to tech support, and makes the nightly backup. Or click **Run Backup Now** under SETTINGS > Admin Tools before you close it.

CHAPTER 15

Reports

Click **REPORTS** at the top right. The Reports window opens full screen, with two tabs.

STORE REPORTS has the everyday reports: End of Day (this register or all registers), Monthly Sales Tax Collected, vendor and booth lists, the monthly rent report, payroll, the 1099 summary, and the vendor summary of sales.

REPORT LIBRARY has everything else. Click a report on the left, fill in only what it asks for (a month, dates, a vendor, or a tax year), and click **Run Report**. It shows on the screen and opens as a PDF.

Report	What it tells you
Monthly Sales Tax Report	The month's total sales tax, and how much was collected each day. Use it for your sales tax return.
Receipt Log	Every receipt, in order.
Reseller Sales Report	Every tax-free sale to a reseller, with their tax number and details.
Reseller Year-End Report	Who bought what all year - every item each reseller bought, with prices. Prints by itself in January.
Cost of Goods Sold	What's owed to vendors for what sold, and what the store kept - today, this week, this month, this year.
Vendor Sales - No Expenses Deducted	Each vendor's total sales with nothing taken out.
Vendor Sales - Net of Commission and Fees	Each vendor's sales after the store's share.
Vendor Payment Methods Comparison	Which forms of payment each vendor's customers used, how many times, and how much.
Vendor Pay Report	What each vendor's check will be for a month.
Vendor Inventory Report	Every item in inventory, by vendor.
Vendor Phone Lists	Every vendor's phone and email, by name or by Vendor ID.
Rental Income	Rent collected for the month, and who's behind.
Booth Lists	Every booth and who has it, by booth number or by Vendor ID.
Booth Profits	What each booth earned the store - today, this week, this month, this year.
Layaway Report	Every open layaway, and the payments taken.
Delinquent Layaway Letters	A reminder letter for every overdue layaway.
QuickBooks Export	Each day's sales as journal entries for QuickBooks.
Sales Workbook for Google Sheets	Daily sales, vendor sales, and every item sold, as a spreadsheet.

Report	What it tells you
1099 File for the IRS FIRE System	All your vendors' 1099s in one file for the IRS's old FIRE system - only until November 19, 2026, when FIRE closes. After that, use File and Pay It > TAX FORMS > Send 1099s to the IRS.

Every report has these buttons:

- **Print / Save PDF** - the report as a PDF to print or keep.
- **Export to CSV** - a spreadsheet copy.
- **Send to Google Sheets** - opens it in Google Sheets.

Report pages look like a Microsoft Access report: a grey header row, every other line shaded light grey, totals in bold, and "Page 1 of 3" at the bottom. On the screen, every column is wide enough for its words, so lines never run into each other.

TIP

Reports never show voided or deleted sales (except the Receipt Log, which marks them so you can see them).

CHAPTER 16

Settings and hardware

Settings and Admin Tools (SETTINGS tab at the top)

Only one copy of Consign It opens at a time on a computer. If you click the icon while it's already open, it warns you and shows you the one that's open.

SETTINGS opens without a password. It has the tax rates, card fee, commission, consignment rate (15% to start), bank information (the bank boxes ask for the admin password - and when you type the bank's name, a box pops up asking for the bank's address and phone number for the deposit slip) and next check number, email settings for the daily vendor emails, your backup folder, the layaway fee and days, and the **Tech Support Email**. The **Sales History** box on the right has two drop-down lists. **How long to keep sales** - 90 days of detailed sales (the usual) or **all** of your sales history forever. **Who backs up the sales** - the store, every night to the USB stick (the usual); the store, nightly **plus every 10 minutes** (the office computer copies your newest sales to the USB stick - the USB Backup Folder Path - every 10 minutes; **warning: it can make Consign It run extremely slow**); or **Heirloom Software does the backup** - an encrypted copy kept off-site, with the yearly plan (\$120 a year), coming soon. Until Heirloom Software finishes setting it up (and always, as a spare copy), the nightly USB backup keeps running - keep the stick plugged into the office computer. If the screen is too short, the SETTINGS tab scrolls.

The **Backup USB Stick** box (under Tax Forms) shows which backup stick is in use and how full it is. When it gets 90% full, Consign It warns you and walks you through switching: it renames the old stick with the first and last days it was used (for example **Consign It Backup 1 - 01/05/2026 to 10/09/2026**), asks you to put in the new one, and - once you check that it's in - names it **Consign It Backup 2** and saves the backups to it. Check **Switch to a new backup USB stick** to do it any time.

Under Sales History, the **Spelling** box turns the suggested words (shown as you type) on or off for every box in the program.

Next to it is the **Tax Forms** box, for a store outside the United States. Checking **Forms not needed - I am not in the United States** turns off the 1099, W-2, W-4, W-9, I-9, and state forms everywhere in Consign It. It needs the admin password, and you must agree to the statement under it: "I swear under penalty of law that I do not need these forms, and I agree that I take sole responsibility for this action." The **Not Required to Complete U.S. Tax Forms** box (in Employee Files and at the bottom of File and Pay It > TAX FORMS) is the same switch.

The **Bank Name**, **Routing Number**, and **Account Number** boxes are darkened so nobody can read them. Click one and type the admin password to see or change them.

ADMIN TOOLS has the **Office Computer and Registers** box (the office computer and every register, its number, and whether its key is in; Share the Store's Information; Remove Selected Register; and, on the office computer, **This office computer also rings up sales** for a one-computer store, **Add a Register...**, and **Move the Office Computer...**; on a register, **Connect to the New Office Computer...**), **Send Vendor Emails Now**, **Run Backup Now**, **Run Monthly Export**, the **Import Data From a Spreadsheet** box (Import Vendors, Import Resellers, Import Employees), the **Export Data to a Spreadsheet** box (Export Vendors, Export Resellers, Export Employees, Export All Data), **Log Out**, and - far down, in a red

box - the **Danger Zone** for erasing all data (it asks four times and can't be undone) and **Uninstall Consign It...** (not recommended).

Hardware Settings (⚙️)

Section	What it's for
Receipt Printer	Pick your receipt printer from the drop-down (if the one picked isn't plugged in, Consign It finds the receipt printer Windows has). Print a Test Receipt checks it. Barcodes / QR Code... can print the transaction number as a barcode and a QR code ("Thank you for shopping with us") under the receipt.
Cash Drawer	Whether you have one, and the cash it starts each day with.
Credit Card Processing Machine	Pick your card machine from the drop-down (Square, Clover, Verifone...). Most run on their own, so Windows not finding one is normal.
Report Printer	A regular printer for reports, picked from its own drop-down (the Vendor Pay Report prints here by itself on the 1st).
OCR / UPC Scanning	Turn on if you scan barcodes.
Penny Usage	Rounding to the nearest nickel (the usual) or charging to the penny.
Digital Payment Accounts	The Cash App, Venmo, Apple Pay, and PayPal accounts your store takes money on.
Receipt Header / Footer	What prints at the top and bottom of receipts, and your store initials - its own pop-up window, opened by checking I have a receipt printer.

CHAPTER 17

Getting help

Click **SUPPORT** at the top right. The Support screen opens full screen and scrolls, so everything on it can be read.

- **Where Your Information Is Saved** - at the very top: says where the store's information is kept, with a button that opens the folder. On the office computer that's the **Consign It** folder in C:\Users\you\AppData\Local\Heirloom Software - the files ending in .db are your records.
- **View Read Me First / EULA** - the agreement and notice you agree to when Consign It first opens on a computer (and again after each update).
- **Consign It - A Plain-English Guide** - the full guide to every screen.
- **Consign It - POS Guide** - this guide.
- **Technical README** - notes for your computer helper.
- **Sample Import Sheets** - a ready-made sheet for importing your inventory, your vendors, your resellers, or your employees. **LibreOffice Sheet** makes it as a LibreOffice spreadsheet linked to Consign It - type your own rows over the SAMPLE ones, save, and click **Import LibreOffice Sheet**. Or use **Google Sheets Sample**, or **Import a File...** for any Excel, LibreOffice, OpenOffice, or CSV file. (The same choices are on the  Import Data icon on the left.)
- **Get Remote Tech Support** - lets a technician connect to your computer to help, one time only.
- **Email a Suggestion to Tech Support** - want something added or changed? Click it, **explain in detail what you want done** (which screen, what it should do, and why), and click **Send at End of Day**. It's emailed to tech support with the 9:00 PM emails. You can also click the tech support email link to write it in your own email program.

When something doesn't work

What's happening	What to do
Nothing prints	Check the printer is on and has paper. In Hardware Settings, make sure I have a receipt printer is checked and the name matches Windows exactly.
The drawer doesn't open	Open it with its key. In Hardware Settings, make sure I have a cash drawer is checked and the receipt printer is set up (the drawer opens through the printer).
"Vendor ID isn't set up yet"	Click Yes - the Vendors screen opens with that Vendor ID filled in. Add the vendor, then ring the item up again.
The printer drop-down only shows PDF, XPS, OneNote, or Fax	Your printer isn't set up in Windows yet. Plug it in, add it under Windows Settings > Printers, then click Auto-Detect again.
The words on the screen look blurry	That's a screen set larger than 100% in Windows. On Windows 10 and 11 Consign It's words are sharp now; on Windows 7 or 8, set Display to 100%.

What's happening	What to do
Something looks missing after an update	Nothing is deleted - a copy of the store's information from before every update is in the Store Backups Before Updates folder. Call tech support.
Consign It isn't in Windows Settings > Apps	Run Install Consign It from the USB stick once (it keeps everything) - that lists it there, with Uninstall.
I forgot the admin password	Contact Heirloom Software LLC tech support - they can get you back in so you can set a new one.
Reports say SAMPLE	The trial hasn't been activated yet - load your license file on the ACTIVATION tab.
Everything is locked except ACTIVATION	The 30-day trial has ended. Load your license file - nothing you entered has been lost.
Vendors didn't get their emails	Leave Consign It open past 9:00 PM, and check the email settings under Settings.
It won't start on Windows 7 or 8	Install all Windows Updates (especially KB2999226), then try again.
A register says it can't reach the office computer	Turn on the office computer and check the network cable. If Windows needs a password, open the office computer's address in File Explorer and sign in.
The office computer says it needs its office copy key	Every store needs the office copy (\$149). Load the office copy key on the office computer's ACTIVATION tab.
A register says it needs its register key	Each register after Register 1 needs its own register key (\$299 for the second register, \$224 after that) - load it on that register's ACTIVATION tab.
The REGISTER tab is grayed out	That's the office computer - it does everything except ring up sales. Ring sales up on a register. (If it's your only computer, turn on This office computer also rings up sales under SETTINGS > ADMIN TOOLS.)
I lost my license file	Contact Heirloom Software LLC - they can send the same file again.

CHAPTER 18

Checklists to keep by the register

Every morning

- Open Consign It with the icon on the Desktop (the price tag on a blue square).
- Clock in on the **TIME CLOCK** (top of the screen).
- Put the starting cash in the drawer.
- Look at the **LAYAWAY / PUT MONEY DOWN** tab and call anyone who's **OVERDUE**.

Every night

- Finish or void any held sales.
- Run the **End of Day** (REPORTS > Print End of Day Report), count the drawer, and file the report.
- Leave Consign It open on the office computer until after 9:00 PM, or click **Run Backup Now**.

Every week

- Make sure the backup USB drive is plugged in and new backups are showing up on it.

Every month

- On the 1st, check the **Vendor Pay Report** that printed by itself, then pay vendors under  File and Pay It.
- Run the **Monthly Sales Tax Report** for your sales tax return.
- Run **Rental Income** to see who's behind on rent.
- Print **Delinquent Layaway Letters** for overdue layaways.
- If you use QuickBooks, run the **QuickBooks Export**.

Every January

- Make 1099s and W-2s under  File and Pay It > **Yearly Forms**, and have your accountant look them over.
- To e-file the 1099s, click  **File and Pay It** > **TAX FORMS** > **Send 1099s to the IRS...** (apply once first with **Apply to E-File with the IRS...** - the IRS can take up to 45 business days).

TIP

Checks and reports are never printed without you seeing them first - Consign It always shows you a PDF to look over.