How to Create a Consignor Contract

Rose 3.0 · Contracts

In each screenshot, the **yellow boxes** show what to click. Numbers give the order.

Overview

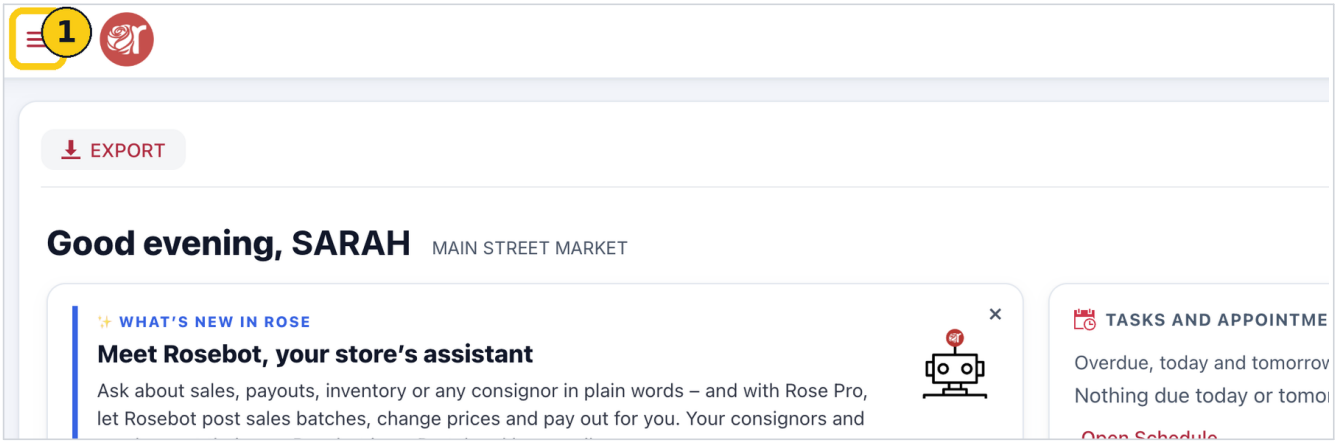
A contract is the account for each consignor or vendor. It holds their name and contact details, their split, their payout history, their myPortal access and the defaults for their items.

Where to find it: Dashboard › menu (☰) › **Contracts** › **CREATE**.

Important: each section of the contract has its own **SAVE CHANGES** button. Save each section before you scroll on to the next one.

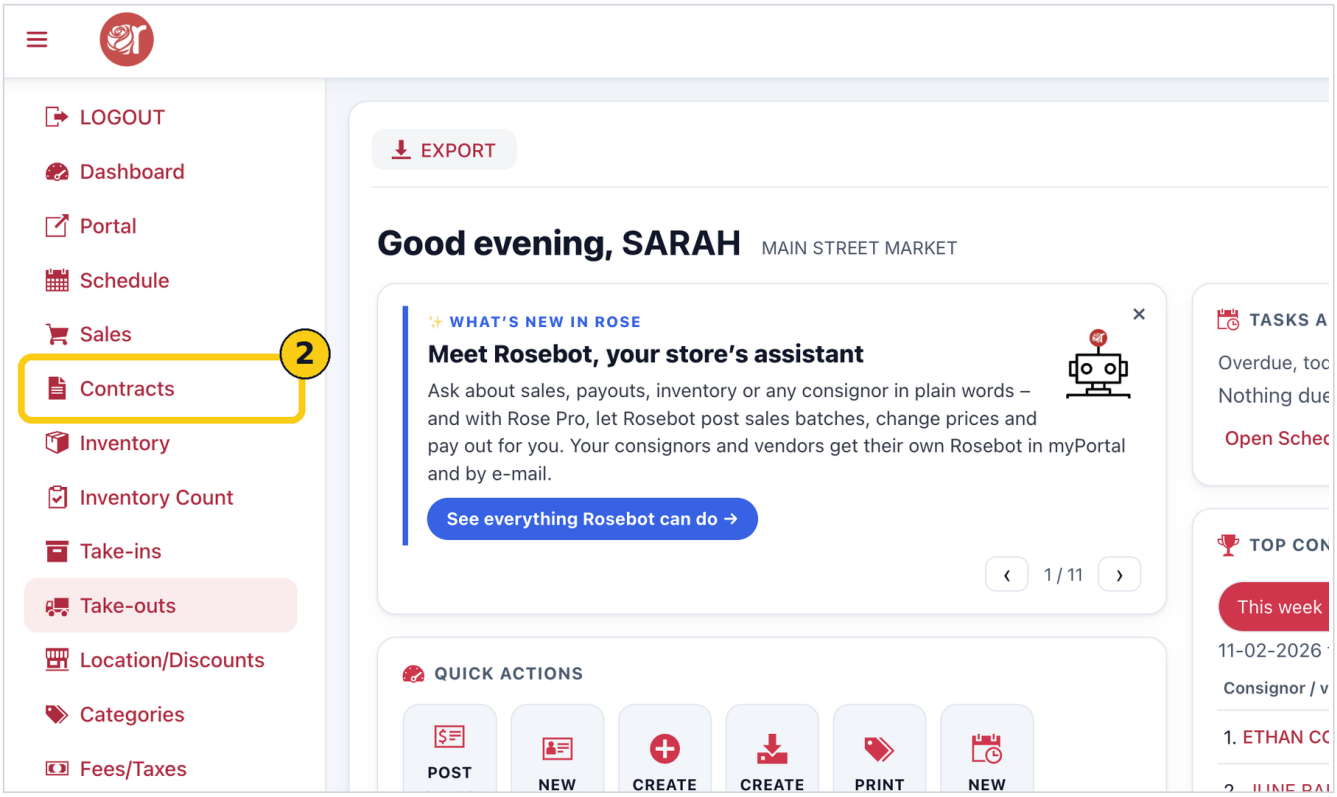
Step 1: Open Contracts from the Dashboard

1 On your Dashboard, click the menu icon (☰) in the top-left corner.



Open the menu from the Dashboard.

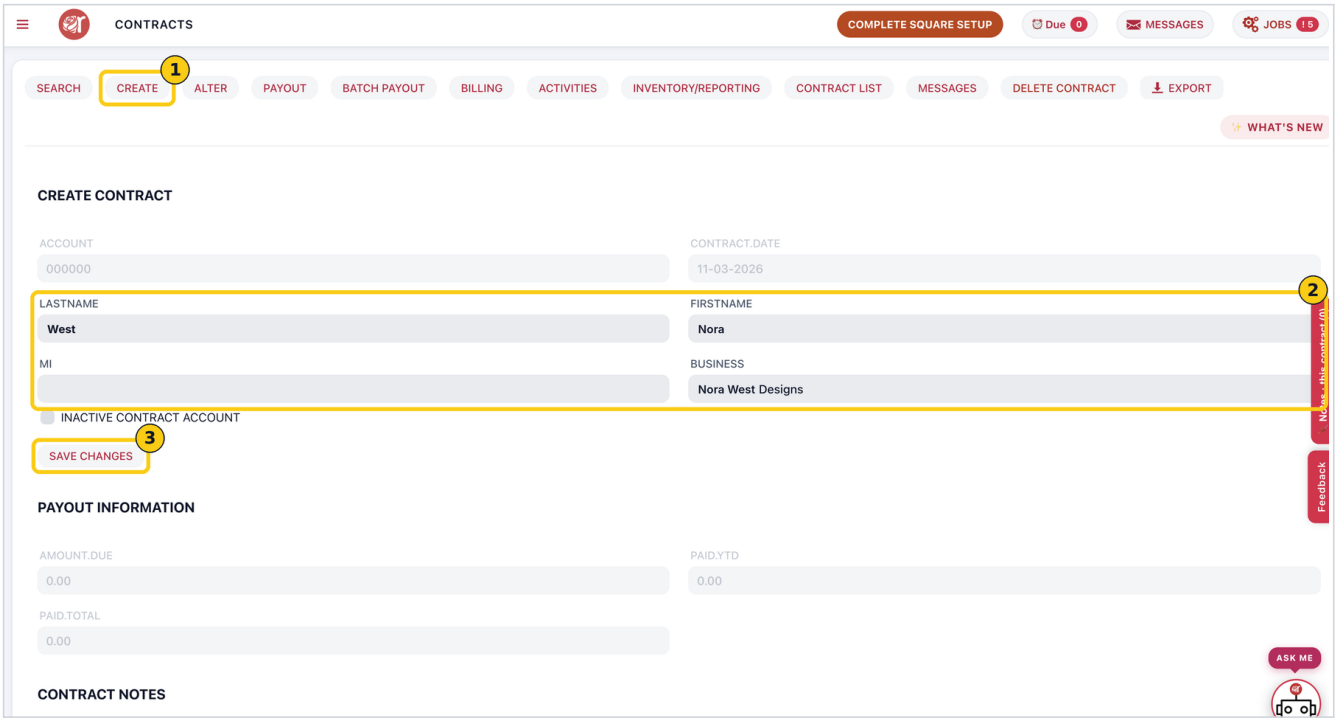
2 Click **Contracts**.



Click Contracts.

Step 2: Enter the consignor's name

1. Click **CREATE**.
2. Enter the **LASTNAME** and **FIRSTNAME**, plus **MI** and **BUSINESS** if they have them.
3. Click **SAVE CHANGES**.



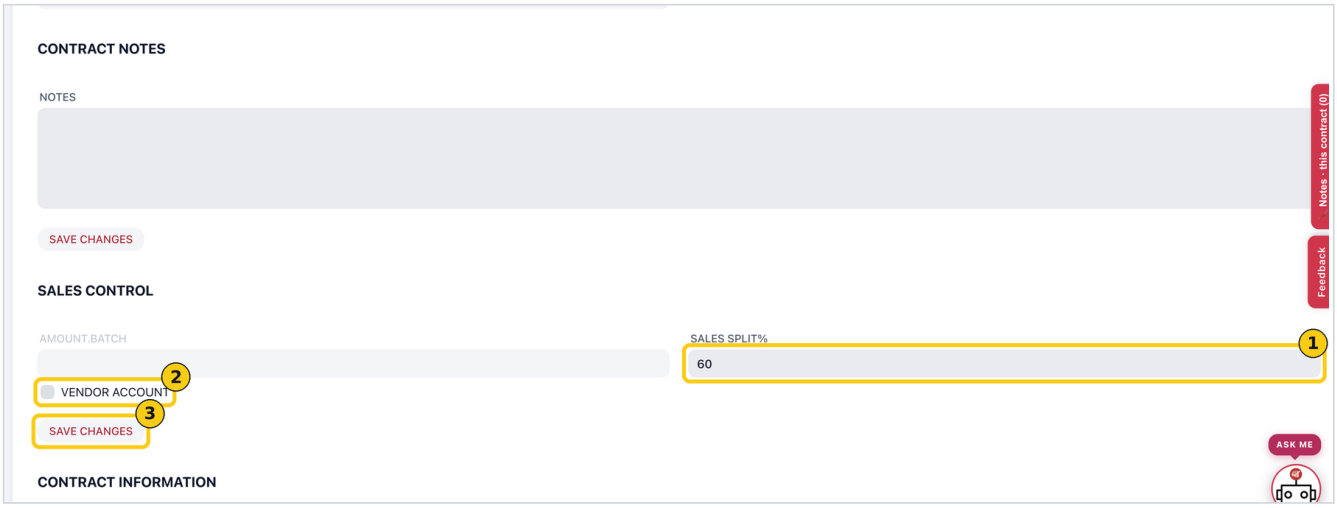
Click CREATE (1), enter the name and business (2), then click SAVE CHANGES (3).

The **ACCOUNT** number shows 000000 until you save; Rose gives the contract its number when it's saved. **CONTRACT.DATE** is filled in with today's date.

Step 3: Set the split

PAYOUT INFORMATION (amount due, paid this year, paid in total) fills in by itself as items sell and payouts are made. Use **CONTRACT NOTES** for anything staff should know about this consignor.

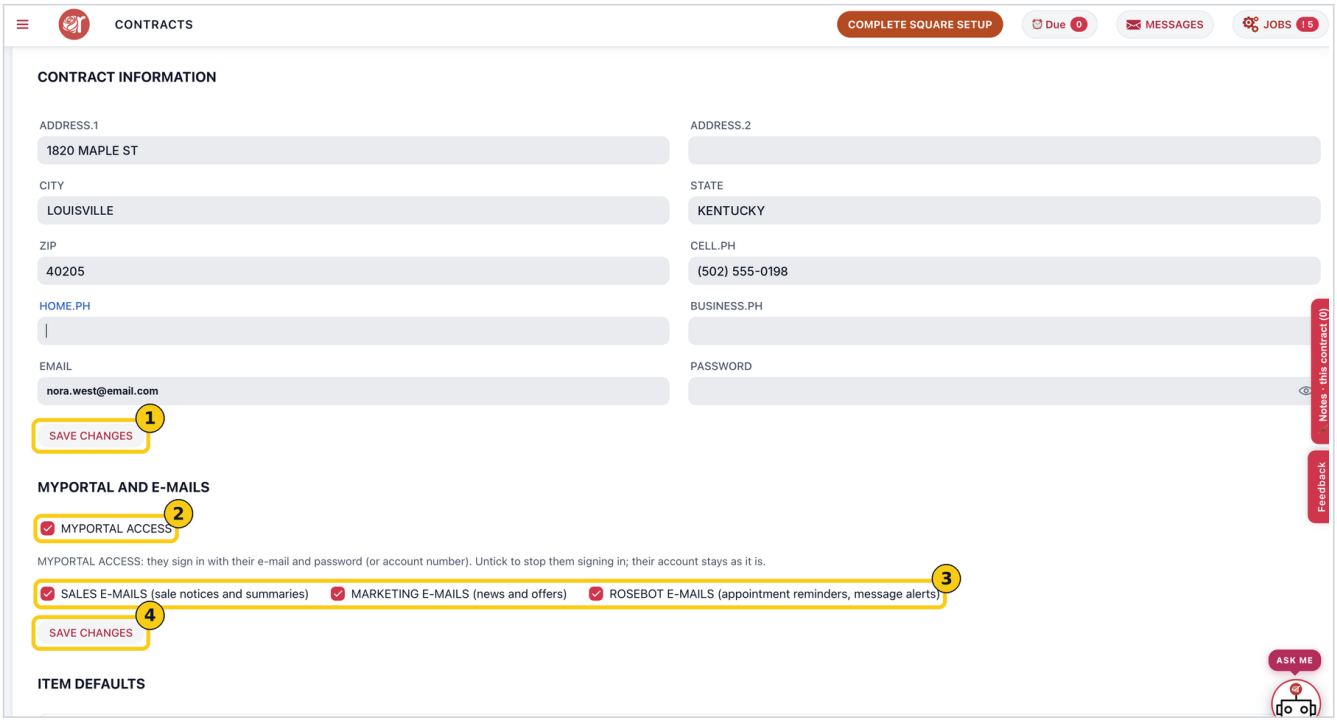
1. In **SALES CONTROL**, enter the **SALES SPLIT%**: the consignor's share of each sale. For example, 60 pays them $3.00 of a $5.00 sale.
2. Tick **VENDOR ACCOUNT** if this account is a vendor rather than a consignor.
3. Click **SAVE CHANGES** under Sales Control.



Enter the split (1), tick VENDOR ACCOUNT if needed (2), then save (3).

Step 4: Add contact details and myPortal access

1. In **CONTRACT INFORMATION**, enter the address, phone numbers and **EMAIL**. Set a **PASSWORD** if they'll sign in to myPortal. Click **SAVE CHANGES**.
2. Under **MYPORTAL AND E-MAILS**, tick **MYPORTAL ACCESS** so they can sign in with their e-mail and password (or account number). Untick it later to stop them signing in; their account stays as it is.
3. Choose which e-mails they get: **SALES E-MAILS** (sale notices and summaries), **MARKETING E-MAILS** (news and offers) and **ROSEBOT E-MAILS** (appointment reminders and message alerts).
4. Click **SAVE CHANGES**.



Save the contact details (1), turn on myPortal (2), pick e-mails (3), then save (4).

Step 5: Item defaults (optional)

Item defaults set how this consignor's new items start out. Save the contract first; until then its items use the store's defaults (Administration › Settings › ITEM DEFAULTS).

Every setting starts on **STORE DEFAULT**, which follows the store's choice and keeps following it if the store changes it later. Anything else you pick wins for this consignor's new items, so only change what's different for them.

Starting values

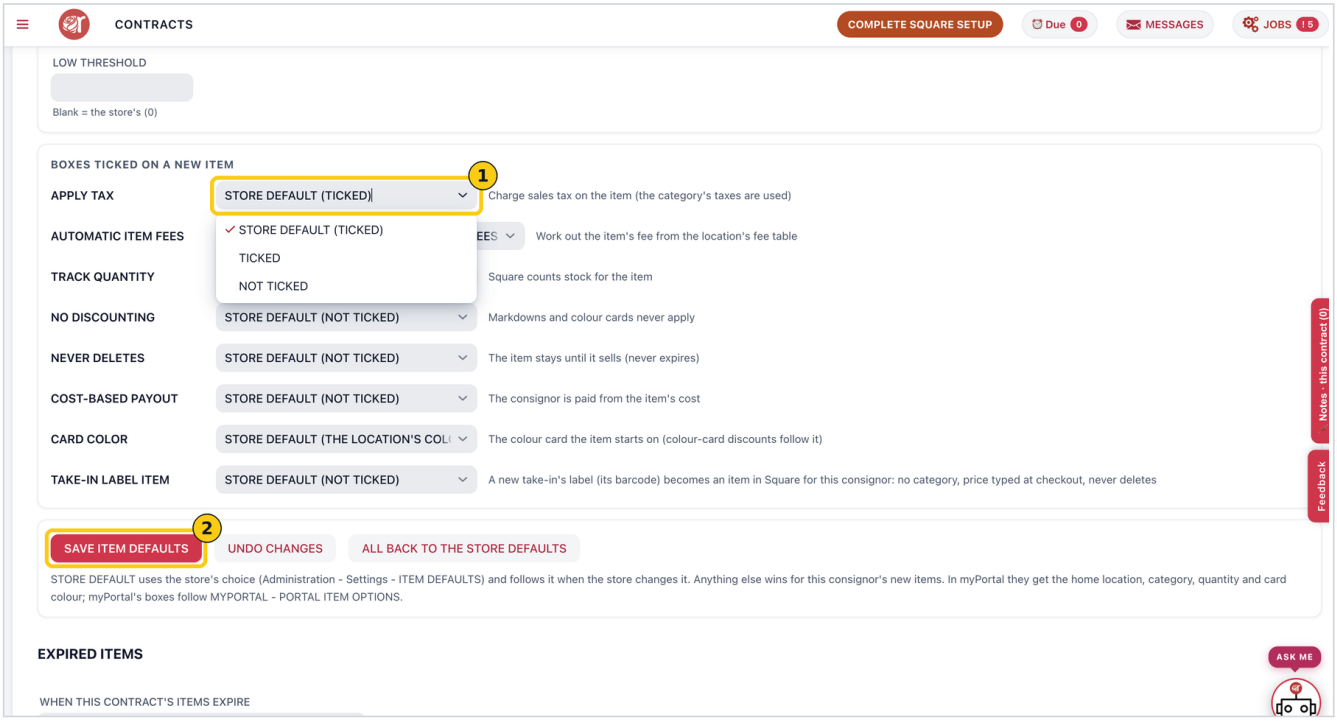
Setting	What it does
Home location	Where this consignor's items (and take-ins) start
Category	Its price, shelf life and fees fill in when it's picked
Quantity	Starting quantity (blank = the store's, not counted)
Pricing type	How items are priced (the store default is fixed pricing)
Low warning, low threshold	Low-stock alerts (blank threshold = the store's, 0)

Boxes ticked on a new item

Each of these offers **STORE DEFAULT**, **TICKED** or **NOT TICKED**. **AUTOMATIC ITEM FEES** also offers **FOLLOW THE LOCATION** (fees switched on there), and **CARD COLOR** offers the location's colour or a set colour.

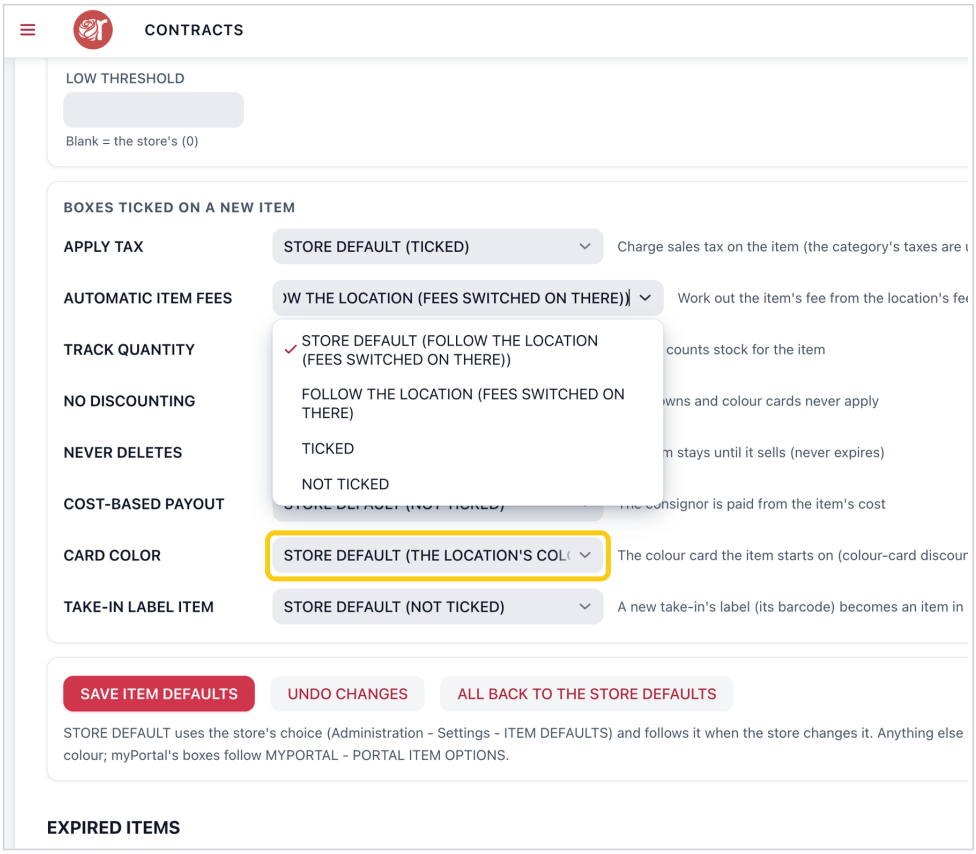
Setting	When ticked	Store default
Apply tax	Charge sales tax on the item (the category's taxes are used)	Ticked
Automatic item fees	Work out the item's fee from the location's fee table	Follow the location
Track quantity	Square counts stock for the item	Ticked
No discounting	Markdowns and colour cards never apply	Not ticked
Never deletes	The item stays until it sells (never expires)	Not ticked
Cost-based payout	The consignor is paid from the item's cost	Not ticked
Take-in label item	A new take-in's label (its barcode) becomes a Square item for this consignor: no category, price typed at checkout, never deletes	Not ticked

1. Open the dropdown for each setting you want to change and pick the new value.
2. Click **SAVE ITEM DEFAULTS**.



Pick a value (1), then click SAVE ITEM DEFAULTS (2).

CARD COLOR choices: the location's colour, Light Blue, Blue, Light Green, Green, Yellow, Orange, Peach, Gray, Purple, Pink, Red or White. Colour-card discounts follow the colour the item starts on.



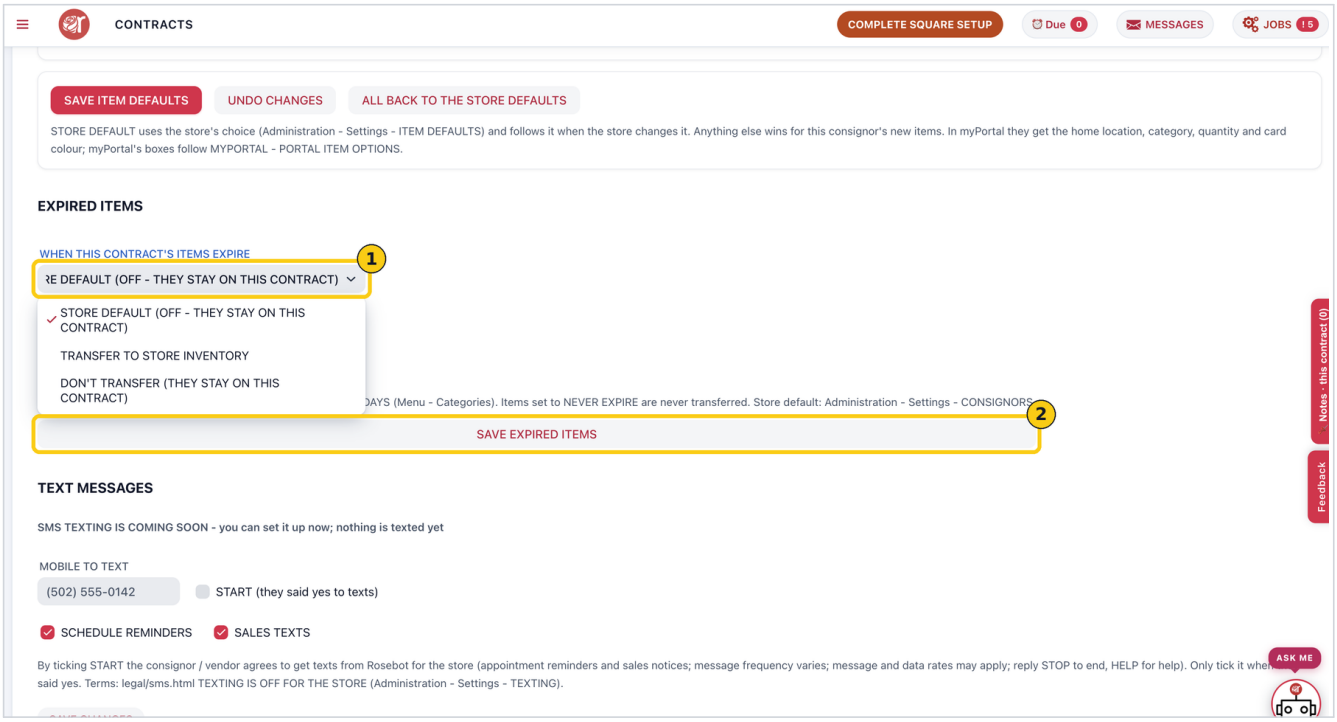
The CARD COLOR list.

Made a mistake? **UNDO CHANGES** drops edits you haven't saved, and **ALL BACK TO THE STORE DEFAULTS** resets every setting to STORE DEFAULT.

myPortal: when this consignor adds items in myPortal, they get the home location, category, quantity and card colour set here. myPortal's tick boxes follow MYPORTAL › PORTAL ITEM OPTIONS instead.

Step 6: Expired items (optional)

1. Under **EXPIRED ITEMS**, open **WHEN THIS CONTRACT'S ITEMS EXPIRE** and choose: **STORE DEFAULT** (the store's setting, which is to leave them on this contract), **TRANSFER TO STORE INVENTORY** (move them to the contract shown in **TRANSFER TO CONTRACT #**, the store account), or **DON'T TRANSFER** (they stay on this contract).
2. Click **SAVE EXPIRED ITEMS**.



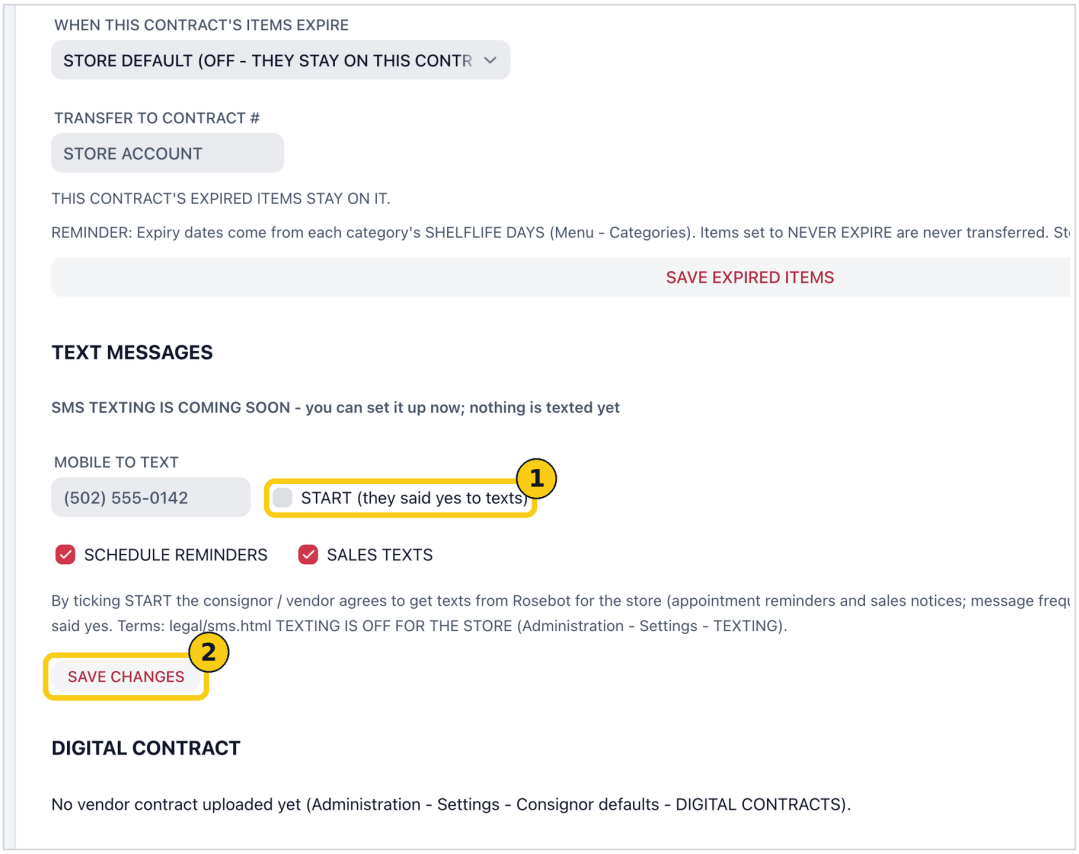
Choose what happens at expiry (1), then click SAVE EXPIRED ITEMS (2).

Expiry dates come from each category's **SHELFLIFE DAYS** (Menu › Categories). Items set to never expire are never transferred. The store-wide setting is in Administration › Settings › CONSIGNORS.

Step 7: Text messages (optional)

Note: SMS texting is coming soon. You can set it up now, but nothing is texted yet.

1. Under **TEXT MESSAGES**, enter the **MOBILE TO TEXT** number.
2. Tick **START** only when the consignor has said yes to texts. Ticking it records their consent to appointment reminders and sales notices from Rosebot (they can reply STOP to end).
3. Choose **SCHEDULE REMINDERS** and **SALES TEXTS**, then click **SAVE CHANGES**.

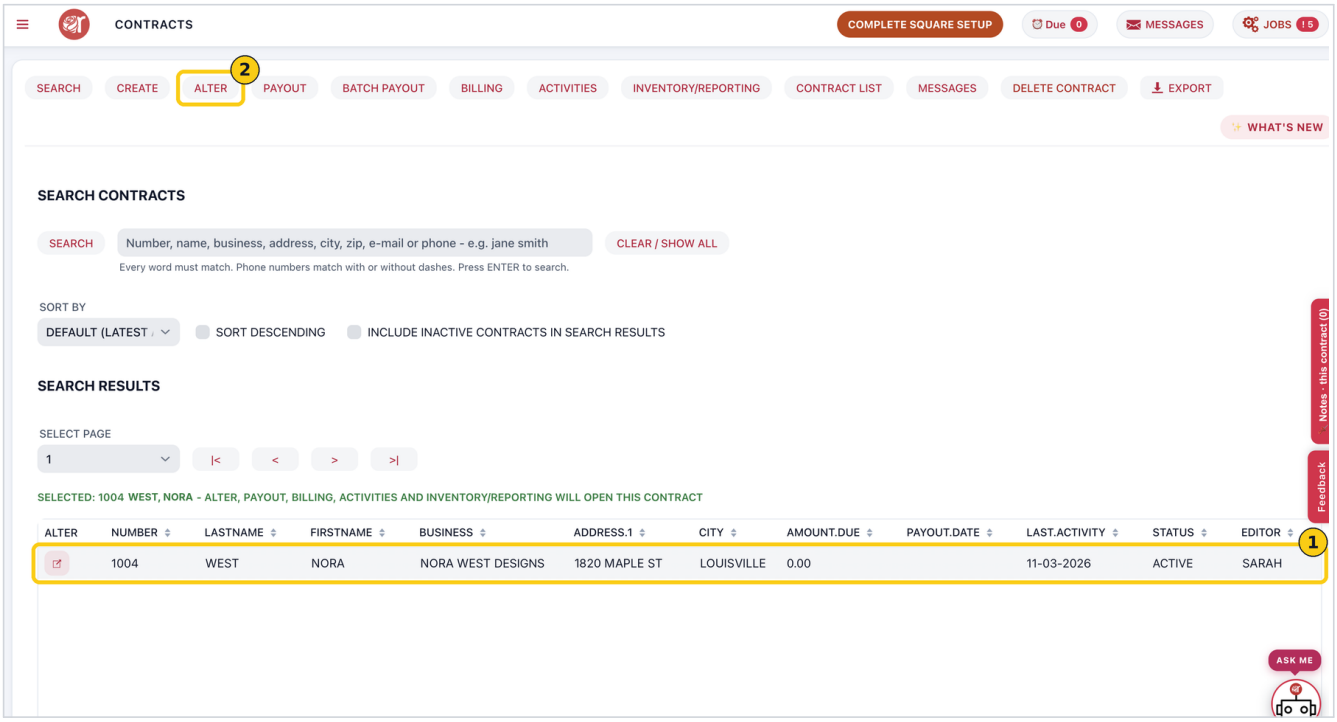


Tick START once they agree (1), then save (2).

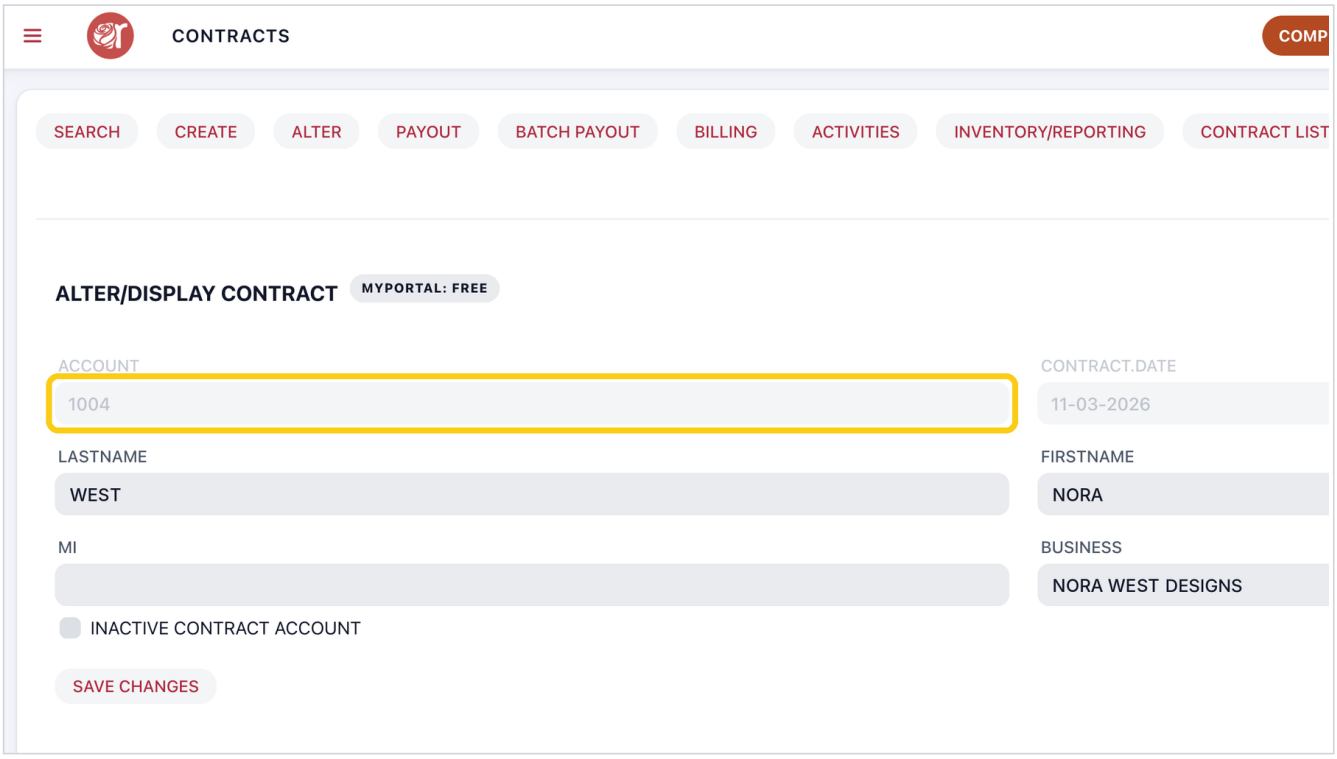
Texting must also be switched on for the store in Administration › Settings › TEXTING. A **DIGITAL CONTRACT** appears under this section once one is uploaded in Administration › Settings › Consignor defaults › DIGITAL CONTRACTS.

Step 8: Find the new contract

1. Click **SEARCH** and look up the consignor. The new contract is listed with its account number.
2. Click the row to select it. **ALTER**, **PAYOUT**, **BILLING**, **ACTIVITIES** and **INVENTORY/REPORTING** now open this contract.



Select the contract (1), then click ALTER to change it (2).



The saved contract now has its own account number.

FAQ

How do I close a contract?

Open it with ALTER, tick INACTIVE CONTRACT ACCOUNT and click SAVE CHANGES. Inactive contracts are left out of search unless you tick INCLUDE INACTIVE CONTRACTS IN SEARCH RESULTS.

Can I change the split later?

Yes. Open the contract with ALTER, change SALES SPLIT% and click SAVE CHANGES under Sales Control.

Do I have to fill in every section?

No. Only the name is needed to save. Everything else can be added later with ALTER.