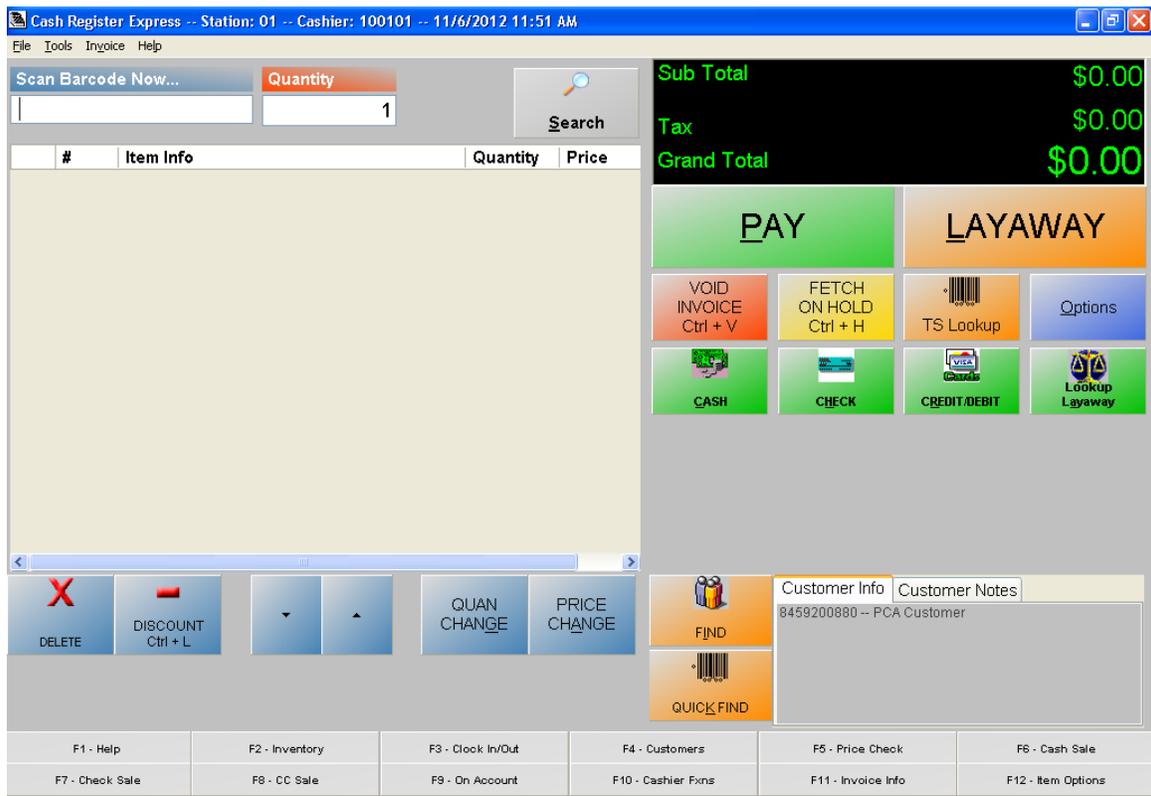
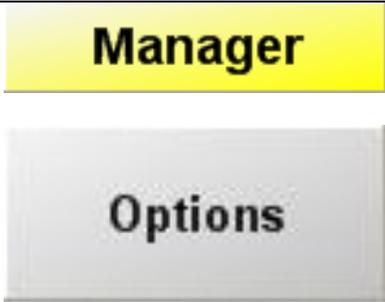
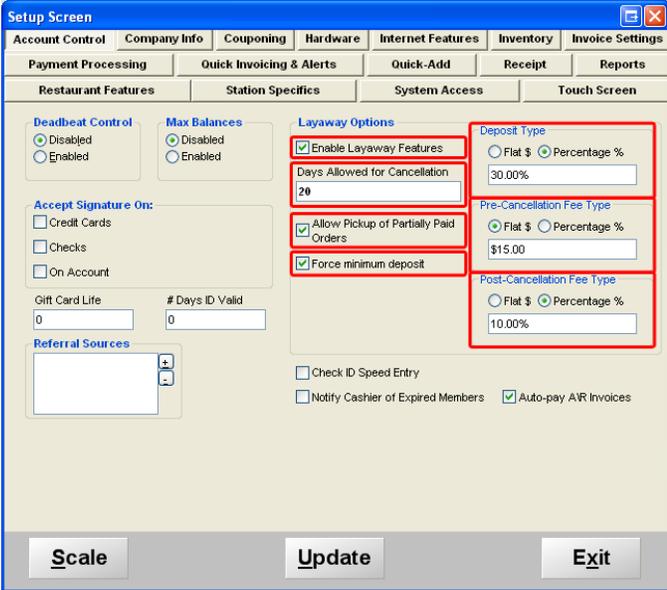


Setting up Layaway



Layaway is the ability to give the option to your customers to pay an item off. For example if you are the owner of an electronics store and you are selling a large TV for a price of \$1,000.00 you can have the customer put an initial payment on the TV. Then pay the remaining balance off in monthly or weekly installments.

Enable Layaway

	<ol style="list-style-type: none"> 1. Select the Manager or Options button. 2. Enter the administrator password (default: admin) where applicable. 3. Select Setup then, Setup Screen.
	<ol style="list-style-type: none"> 4. At the Setup Screen go to the Account Control tab. 5. Under Layaway Options select Enable Layaway Features. 6. Optionally you can select to: <ul style="list-style-type: none"> • Set a number of Days allowed for Cancellation. • Allow Pickup of Partially Paid Orders. • Force a Minimum Deposit. 7. For Deposit Type you can either select to have the customer put a flat amount or a percentage of the total of the item for the initial payment. 8. A Pre-Cancellation Fee Type is a fee that is charged if the layaway is cancelled <i>within</i> the number of days specified in the Days Allowed for Cancellation field. 9. A Post-Cancellation Fee Type is a fee that is charged if the layaway is cancelled <i>after</i> the number of days specified in the Days Allowed for Cancellation field.

Create Items to be used for Layaway

Manager

Options

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Inventory Maintenance**.

The screenshot shows the 'Inventory Maintenance' window with the 'Item: Sweater Orange' form. The form is divided into several sections:

- Item Information:** Department (SWEATERS), Item Number (Sweater01), Description (Sweater Orange), Avg Cost (\$10.00000), Price you charge (\$20.00), Price with tax (\$20.00), and # In Stock (20).
- Tax Options:** Tax (checked), Bar Tax, Tax 2, and Tax 3.
- Optional Info:** Bonus Point (0), # Barcodes (0), Commission (% of Gross Profit, 0.0%), Location, Unit Size (0), and Unit Type.
- Properties:** Alternate SKUs (checked), Tag Along Items (checked), Modifier Item, Exclude from Account Limit, Check ID Before Selling, Check ID #2 Before Selling, Count This Item (checked), Disable this Item, Prompt Quantity, Prompt Price, Allow Buyback, Print on Receipt (checked), Foodstampable, Auto-Weigh, Use Serial\Batch #, and Special Permission.
- Search and Action Buttons:** Search by Item Number, Profit% (100.0%), Retail Discount (0%), Gross Margin (50.0%), Add Item, Save, Transfer, Instant PO, Previous, Look up, Next, Help, Duplicate, Delete, and Exit.

4. Select **Add**.
5. The required information for the item is on the top one-third of the screen:
 - The **Department** this item will be inside of (ex: SWEATERS).
 - A unique **Item Number** (ex: Sweater01, or the barcode of the item).
 - A **Description**, which will print on the receipts (ex: short sleeve v-neck).
 - Your **Cost**, which is the price you pay.
 - The **Price you charge** the customer.
 - An optional **# In Stock** value if you track stock levels.
 - Various tax options if you charge tax for this item.

Inventory Maintenance

Item: Sweater Orange [Print Labels](#) [Keyboard](#)

Department for this Item: **SWEATERS** Avg Cost: **\$10.00000** Tax Bar Tax

Item Number: **Sweater01** Price you charge: **\$20.00** Tax 2

Description: **Sweater Orange** Price with tax: **\$20.00** Tax 3

In Stock: **20** Click to Select Picture

Optional Info Pending Orders Properties Notes Modifiers Price Levels

Ordering Info Special Pricing Matrix Sales History Printers Recipe

Options **Additional Info**

Prompt Completion Date Exclude From Loyalty Plan Scale Item Type
 Prompt Invoice Notes Print Ticket Sold by Piece
 Prompt Description Scale Single Deduct Weighed on Scale
 Sell 'As Is' Allow Returns Weighed with Tare
 Require Customer Liability Item
 Allow on Deposit Invoices

Discount Type (Retail Only): **Percent**
 General Ledger Number:

Prompt for Description Over:

Days Valid: Unit Measure:

Search by Item Number:

Profit%: 100.0 % Retail Discount: 0 % Gross Margin: 50.0 %

Previous Look up Next Help Add Item Save Transfer Instant PO
Delete Exit

6. Go to the **Additional Info** tab.
7. Select **Allow on Deposit Invoices**.
8. Select the **Save** button and the item will now be added to your inventory list.

Creating the Customer for Layaway

Manager

Options

10. Select the **Manager** or **Options** button.
11. Enter the administrator password (default: admin) where applicable.
12. Select **Administrative** then, **Customer Maintenance**.

Customer Maintenance
This Customer All Customers Print Customer Labels

Keyboard

Customer # 8459200880 First Name PCA Last Name Customer E-mail Address

General Info Extended Info Account Info Shipping/Billing History Notes Properties

Company Name Primary Phone # Bonus Points Achieved
Street Address Alternate Phone # Birthday
Street Address 2 City Application Date
State Zip Code County Card Swipe IDs
Discount Percentage Discount Level NONE Add Del
 Charge At Cost Tax Exempt Print Notes on Receipt

Previous Next Save Delete Update Cancel

13. At the **Customer Maintenance** screen select **Add**.
14. Enter the following required information:
 - **Customer Number** (tip: Use the phone number as the customer number for easy reference).
 - **First Name**.
 - **Last Name**.
15. If applicable fill in the information under **General Info**.

Customer Maintenance
 This Customer All Customers Print Customer Labels Keyboard

Customer # First Name Last Name E-mail Address

General Info **Extended Info** **Account Info** **Shipping/Billing** **History** **Notes** **Properties**

Account Type
 Standard
 Layaway

Open Account Date
Close Account Date

Balance Due
 \$0.00

Default Salesperson
 Membership Expiration

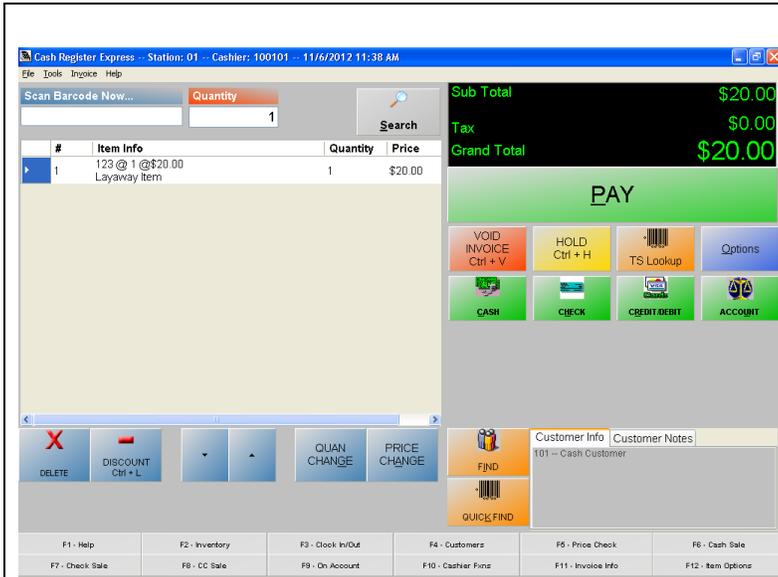
Credit Limit
 Max Balance
 Restrict spending to
 over days starting

Require PO # Entry

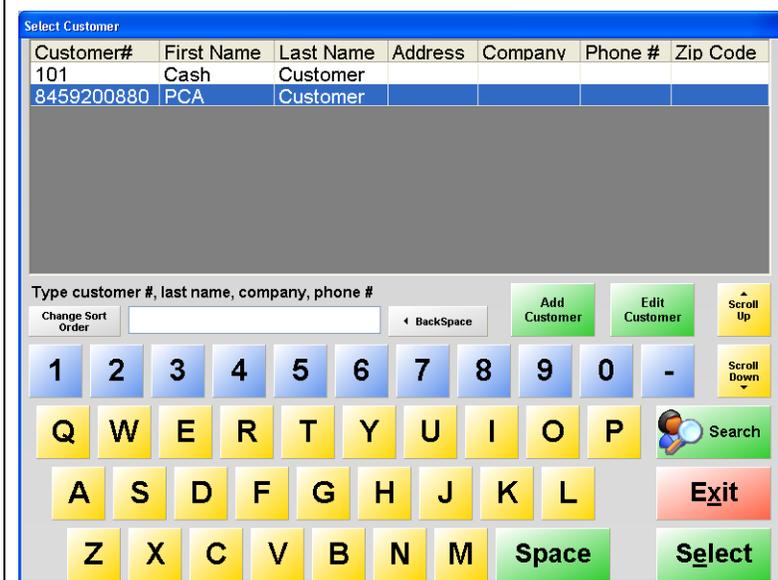
Authorized Members

16. Select the **Account Info** tab.
17. For **Account Type** select **Layaway** to have a customer available for the Layaway features of the software.
18. Under **Open Account Date** select the **O** which will fill in today's date. This is the recorded date when the account was opened.
19. Under **Close Account Date** select the **C** which will fill in today's date which you will change until a later date in time. This is useful for limiting the amount of time that the account can be open.
20. Select **Save** then select **Exit**.

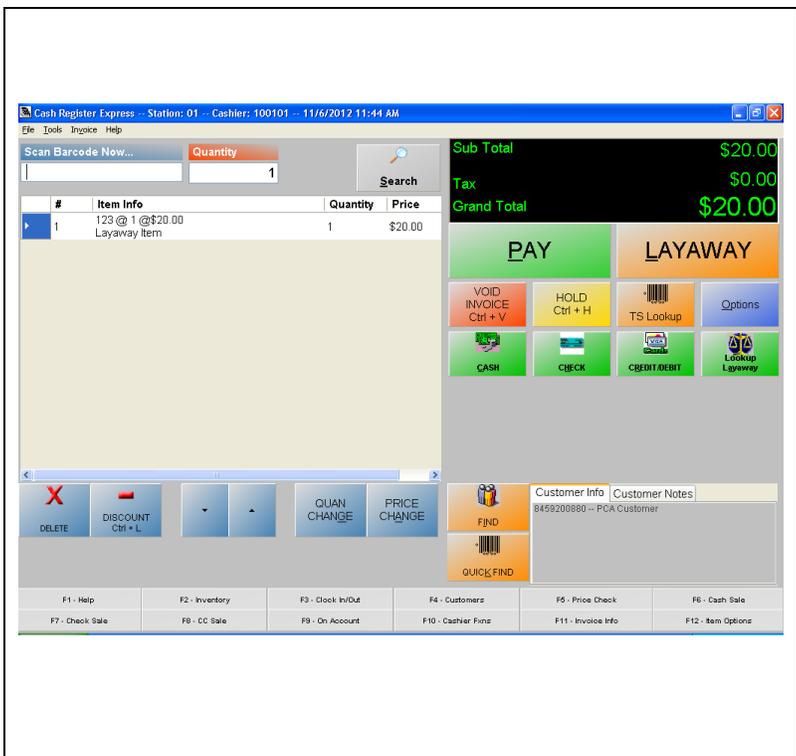
Using Layaway with a new Account



1. Add the item to the invoice that the customer will be placing on layaway.
2. Select **Find** on the invoice screen which will bring you to the customer lookup window.

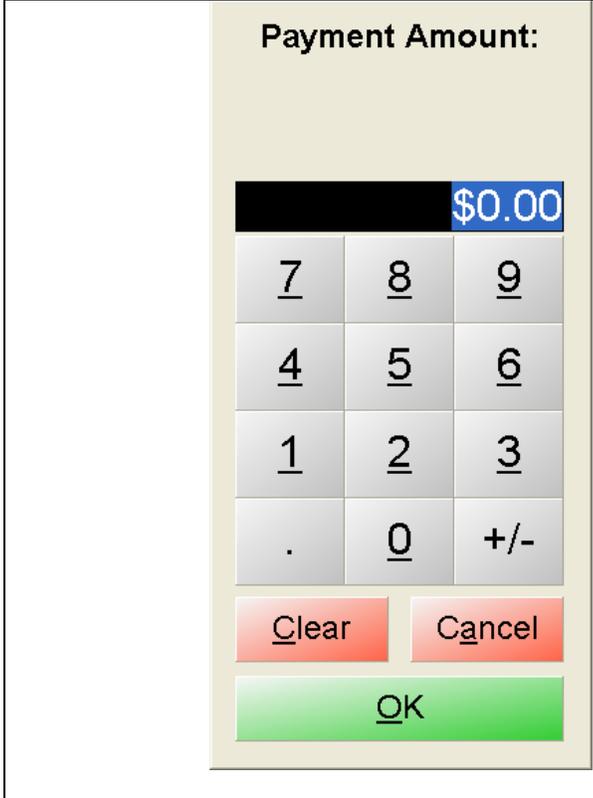


3. Highlight the customer we created earlier and press **Select**.



4. After the (layaway) customer has been added to the invoice select **LAYAWAY**.

Note: The only way to display the **LAYAWAY** button is to add a layaway customer to the invoice.



5. Depending on the options that have been configured you may be prompted to enter the amount that the customer will be paying at the current time and select **OK**.

6. You will then be brought to the amount tendered window where you can complete the transaction as you normally would.

Using Layaway to complete the sale



1. After adding the (layaway) customer to the invoice the account button will be changed to **Lookup Layaway**.
2. Select the button to see all of the outstanding layaway invoices from all customers.

Layaway Lookup					
DateTime	Invoice #	Order #	Amount Owed	Customer #	Customer
5/26/2009	3	0	15.0000	8459200880	Pca Cus

Customer #

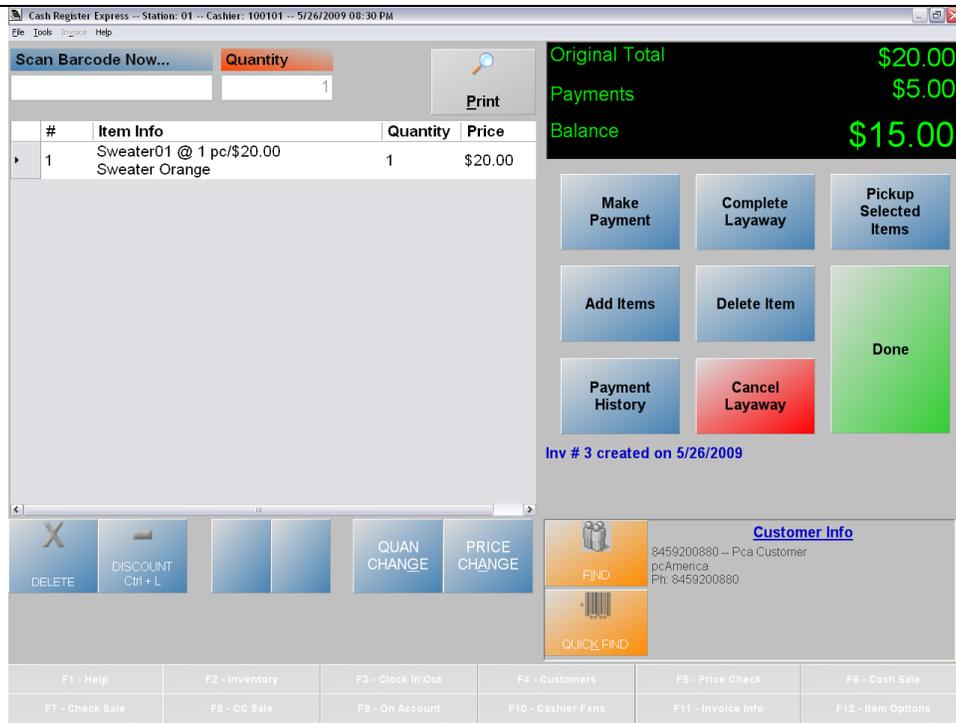
Phone #

First Name

Last Name

Start Date End Date

3. At this screen you will see a list of all the open Layaway transactions.
4. Highlight the account to be edited and touch **Select**.



5. This is the screen where the layaway is handled.

- **Make Payment** – will allow the customer to make a payment toward paying off the balance.
- **Complete layaway** – will allow the customer to pay off the balance.
- **Pickup Selected Items** – will allow the customer to pick the merchandise up after the balance has been paid for.
- **Add Items** – will allow you to add items to the layaway invoice to be paid for.
- **Delete Items** – will allow you to delete items off the layaway invoice. Note: if the value for the items deleted exceeds the amount of payments made then you will be prompted to do a refund for the payments collected.
- **Payment History** – will display all the payments have been made towards the balance.
- **Cancel Layaway** – will return the items and prompt for a refund for the customer.
- **Done** – will get you back to the invoice screen.