

Category	POS-1c	Page 1 of 3	Version 1.0
	POS		Client Generic
			Software 2.14.100

POS Layby Functions

Hints and Tips

- ✓ The full value of a layby reports against sales when it's created.
- ✓ Your business may have a **Service Fee, Minimum Deposit, and Minimum Payment**; these will be either a percentage of the layby or a standard fee.
 - A supervisor may be able to override this amount.
- ✓ Your business may set a **minimum and maximum value that can be put on layby**.
 - A supervisor may be able to override this amount.
- ✓ If you permit **new layby accounts**, the system usually auto-generates a unique code rather than prompting the operator to manually enter one.
- ✓ The **customer receipt** lists the payment schedule required to pay the layby by the due date.

Lay-By Details	
Lay-By Number:	0001010000530
Completion Due:	02/01/2012
Storage Location:	2
Account Number:	21100010105028
Balance Brought Forward	\$128.45
Payment	-\$12.85
Balance Outstanding	\$115.60
Payment Schedule	
17/10/2011	\$17.80
31/10/2011	\$17.80
14/11/2011	\$17.80
28/11/2011	\$17.80
12/12/2011	\$17.80
26/12/2011	\$17.80
02/01/2012	Final Payment \$8.80
Cancellation attracts a fee of \$5.14	

Procedure to Create a New Layby

1.	Press MISC .	
2.	Press Layby .	
3.	Press Create Lay-by .	
4.	<p>To: create a new account if configured</p> <p>then: press New Customer. If prompted, enter a new code, then press New Customer again. Enter their details; press Enter after each line. Press Process.</p>	
	<p>create a layby for a customer with past layby activity*</p> <p>enter their name and press Search by Name, OR use Advanced Search. Select the account. Press Next. Update any details. Press Next.</p>	
	<p>create a layby for an existing customer account*</p> <p>press All Customers. Search for and select the account. Press Next. Update any details. Press Next.</p> <p><i>*You bypass the search screen if you already added their ID to the txn.*</i></p>	

5.	Add/scan products into the layby.	
6.	Press Process Payment .	
7.	If prompted, enter the storage location of the layby; press Next .	
8.	Enter the deposit amount. <i>*Defaults to the standard fee.*</i>	
9.	Press Process Layby Payment .	
10.	Finalise payment as normal. <i>*The amount that will be tendered is the deposit amount.*</i> <i>*A layby agreement receipt and pick slip prints for store-use, along with a customer receipt.*</i>	
11.	Ask the customer to sign the layby agreement (store copy).	
12.	Attach the Pick Slip to the layby parcel.	

Hints and Tips

- ✓ The **Select Layby Customer** option searches on all accounts that have had layby activity.
- ✓ You can scan the **barcode** on the layby agreement receipt, the layby receipt, or the pick slip to retrieve the layby on the Layby Menu screen.
- ✓ Customers receive an **overdue letter** in the mail if the layby due-date has passed and final payment hasn't been received. They have a number of days from the date on the letter to finalise or extend the layby, otherwise it will be cancelled and returned to stock.
- ✓ Your business may permit or restrict layby payments and collection between stores.
- ✓ **Sample layby payment receipt:**

Description	Total \$
Lay-by payment	20.00
TOTAL (Inc GST)	\$20.00
Cash Tendered	\$20.00
Change Due	\$0.00
GST Amount	\$0.00
Lay-By Details	
Lay-By Number:	0001010000530
Completion Due:	02/01/2012
Storage Location:	2
Account Number:	21100010105028
Balance Brought Forward	\$115.60
Payment	-\$20.00
Balance Outstanding	\$95.60
Cancellation attracts a fee of \$5.14	
Must be read in conjunction with Layby Terms and Conditions. Please advise the change of address or telephone number.	

Procedure to Process a Payment (or Finalise it)

1.	Press MISC.							
2.	Press Layby.							
3.	Scan/enter the layby number OR press Select Layby Customer to search for and select the required customer and layby.							
4.	Press Layby Payment. <i>*A warning is displayed if final payment is overdue; follow the prompts.*</i>							
5.	<table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>record a payment</td> <td>enter the amount being paid.</td> </tr> <tr> <td>finalise the layby</td> <td>go to step 6.</td> </tr> </table> <i>*The amount defaults to the outstanding amount owing.*</i>	To:	then:	record a payment	enter the amount being paid.	finalise the layby	go to step 6.	
To:	then:							
record a payment	enter the amount being paid.							
finalise the layby	go to step 6.							
6.	Press Process Layby Payment.							
7.	Finish tendering as normal. <i>*For finalised laybys, a layby completion receipt & a pick slip also print for store-use.*</i>							
8.	Complete the following steps if a finalised layby: <ul style="list-style-type: none"> • Ask the customer to sign the layby completion receipt (store-use) • Collect the layby from storage. 							



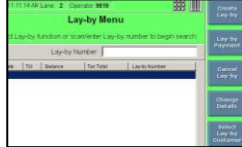
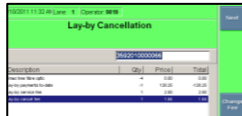
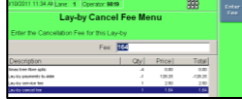


Procedure to Change Layby Details

1.	Press MISC.									
2.	Press Layby.									
3.	Enter the layby number, OR press Select Layby Customer to search for and select the required customer and layby.									
4.	Press Change Details.									
5.	<table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>extend the due date</td> <td>press Due Date. Enter the extra number of weeks. Press Next.</td> </tr> <tr> <td>change the storage location</td> <td>press Storage Location. Enter the new location. Press Next.</td> </tr> <tr> <td>change the address or phone number</td> <td>press Address. Press Clear Line to clear the selected row. Enter the new details; press Enter after each edit.</td> </tr> </table> <i>*The updated information is displayed on screen and in the customers AR account.*</i>	To:	then:	extend the due date	press Due Date. Enter the extra number of weeks. Press Next.	change the storage location	press Storage Location. Enter the new location. Press Next.	change the address or phone number	press Address. Press Clear Line to clear the selected row. Enter the new details; press Enter after each edit.	
To:	then:									
extend the due date	press Due Date. Enter the extra number of weeks. Press Next.									
change the storage location	press Storage Location. Enter the new location. Press Next.									
change the address or phone number	press Address. Press Clear Line to clear the selected row. Enter the new details; press Enter after each edit.									
6.	Press Back to return to the Item Menu screen.									




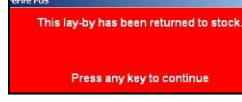


Hints and Tips

- ✓ The **Select Layby Customer** option searches on all laybys with an outstanding balance.
- ✓ You can scan the **barcode** on the layby agreement receipt, the layby receipt, or the pick slip to retrieve the layby on the Layby Menu screen.
- ✓ Your business may have a **cancellation fee**; this will be either a percentage of the layby value or outstanding balance, or a standard fee.
 - You may be able to override this amount with supervisor authorisation.
- ✓ A layby is usually **returned to stock** (via the BOS) if the customer doesn't finalise the layby within a number of days of receiving a reminder letter.
 - Your system may **automatically cancel** a layby a set number of days after it has been returned to stock; the layby won't exist at POS anymore.
 - If the layby has been cancelled, and the customer returns within 24 months to claim a refund, refer to the **Layby Audit report** and **Layby Payments Withheld report** to determine the amount (payments minus any layby fees).

Procedure to Cancel (Refund) a Layby

1.	Press MISC.							
2.	Press Layby.							
3.	Scan/enter the layby number OR press Select Layby Customer to search for and select the required customer and layby.							
4.	Press Cancel Layby.							
5.	<table border="1"> <tr> <th>To:</th> <th>then:</th> </tr> <tr> <td>edit the cancellation fee</td> <td>Press Change Fee. Enter the amount. <i>*OR enter [0] to delete the fee.*</i> Press Enter Fee.</td> </tr> <tr> <td>continue</td> <td>press Next or Yes (as configured).</td> </tr> </table> <p><i>*The Layby Cancel Fee Menu screen only displays if change fee is enabled in your business.*</i></p>	To:	then:	edit the cancellation fee	Press Change Fee. Enter the amount. <i>*OR enter [0] to delete the fee.*</i> Press Enter Fee.	continue	press Next or Yes (as configured).	  
To:	then:							
edit the cancellation fee	Press Change Fee. Enter the amount. <i>*OR enter [0] to delete the fee.*</i> Press Enter Fee.							
continue	press Next or Yes (as configured).							
6.	Finalise the refund as normal. <i>*A layby cancellation receipt and pick slip prints for store-use, along with a customer receipt.*</i>							
7.	Ask the customer to sign the layby cancellation receipt (store-use).							
8.	From the layby from storage. <i>*Use the Layby Audit report to identify all cancelled laybys that can be removed from storage.*</i>							

Procedure to Cancel Laybys Returned to Stock

1.	<p>If RTS laybys: then: go to step 7. are auto-cancelled by the system</p> <p>then: go to step 2. must be manually cancelled</p>	
2.	Press MISC.	
3.	Press Layby.	
4.	Scan/enter the layby number OR press Select Layby Customer to search for and select the required customer and layby. <i>*A warning is displayed, and the Layby payment and Change Details options are disabled.*</i>	 
5.	Press Cancel Layby.	
6.	Press Yes or Next (as configured). <i>*As this layby has been returned to stock, your till will be over by the refund amount owing.*</i> <i>*A Layby Cancellation Pick Slip prints.*</i>	
7.	Return the products to stock. <i>*Use the Layby Audit report to ensure that all RTS laybys/system-cancelled laybys are actioned.*</i>	