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# Configure Layby

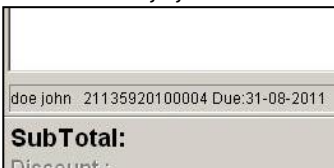
Category	Technical
Course	POS Config.
Version	1.0
Client	Generic
Software	2.13.100

Complete this procedure to offer your customers layby facilities at POS.

## Procedure to Configure Layby

### Hints and Tips

- ✓ The full value of a layby reports against sales when it's created at POS, not when payment is finalised.
- ✓ Laybys are listed against the customers AR account on the HOS/BOS.
- ✓ If you enable the **Show Due Date on screen** option, the layby due-date displays on the operator display whenever they retrieve the layby at POS.



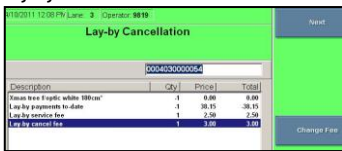
<p>1. Create two stock records; one for a <b>Service Fee</b> and one for a <b>Cancellation Fee</b>.</p> <ul style="list-style-type: none"> <li>• Set GST to 10%.</li> <li>• Set Cost and Retail to \$0.00.</li> </ul> <p><i>*Refer to the <a href="#">PRO-1a Create a New Stock Record Fact Sheet</a> for full instructions.*</i>  <i>*These EANS will be entered at step 9 and 10.*</i></p>	
<p>2. From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b>.</p>	
<p>3. If a HOS user, select the <b>Location</b> that you want to define.</p> <p><i>*You'll be defining the configuration for all stores at and below the level that you select.*</i></p>	
<p>4. Double-click <b>Configure</b>.</p> <p><i>*If a HOS user, click Yes to continue.*</i></p>	
<p>5. From the POS Configuration screen, select the <b>Item -&gt; Layby</b> tabs.</p>	
<p>6. Select the <b>Enable Layby</b> check box.</p>	
<p>7. Complete the following steps in the Payment Schedule section:</p> <ul style="list-style-type: none"> <li>• Select the <b>Payment Period (weeks)</b> that a customer will have to pay off a layby.</li> <li>• Select the <b>Payment Frequency (days)</b> that a customer must make a payment within the payment period.</li> <li>• If required, select the <b>Show Due Date on Screen</b> check box.</li> </ul>	

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## Hints and Tips

- ✓ Your layby service may include:
  - a service fee
  - a minimum deposit
  - a minimum payment
  - a minimum and maximum value that can be put on layby
  - a cancellation fee.
- ✓ You configure if a supervisor can override the fees and limits at step 19.

- ✓ If you enable the **Manually Override Cancellation Fee** option, an extra screen is displayed at POS to provide this option prior to finalising the layby refund.



- ✓ **Options section:**
  - **Restrict Payments to this Store:** if selected, laybys are only known at the store they're created at, so payments and parcel pick-up are restricted to that store.
  - **Restrict Pick up to this Store:** see above.
  - **Separate Address:** this is usually selected, so that the POS operator can enter and edit the layby customer's address and phone number.
  - **Storage Location:** if selected, the operator will be prompted to enter a location against a new layby (free- form text).
  - **Temporary Account Code:** this is usually selected if you permit new layby accounts to be created at POS; the system will auto-generate a unique account code rather than prompting the operator to manually enter a code. This consists of a:
    - 3 digit prefix (211)
    - 4 digit store number
    - 2 digit lane number
    - 5 digit incrementing number.

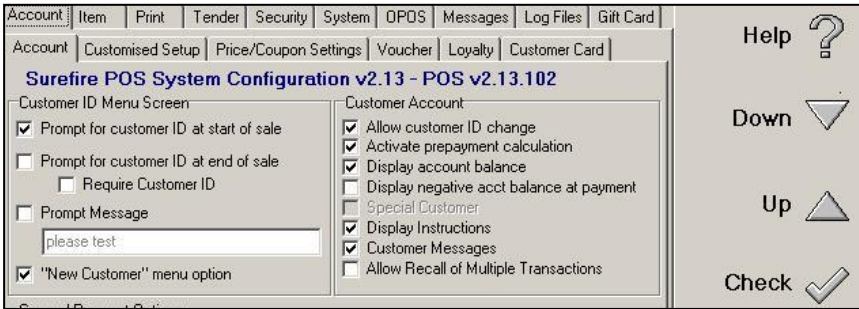
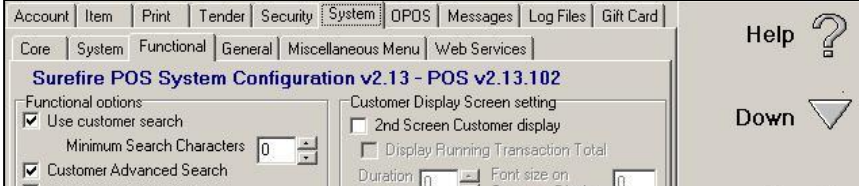
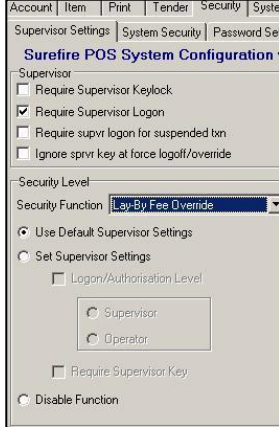

<p>8. Complete the following steps in the Limits section:</p> <ul style="list-style-type: none"> <li>• If a <b>Minimum Deposit</b> applies, select if it's a % or a \$ amount, and in the adjacent field type the amount. <i>*Type [0] if no minimum applies.*</i></li> <li>• If a <b>Minimum Payment</b> applies, select if it's a % or a \$ amount, and in the adjacent field type the amount. <i>*Type [0] if no minimum applies.*</i></li> <li>• Select the <b>Max \$</b> (maximum dollar-value) that can be put on layby.</li> <li>• Select the <b>Min \$</b> (minimum dollar-value) that can be put on layby.</li> </ul>	
<p>9. Complete the following steps in the Service Fee section:</p> <ul style="list-style-type: none"> <li>• Select if the fee is a <b>Percentage</b> or a <b>Fixed Dollar Amount</b>.</li> <li>• In the adjacent field, type the fee amount. <i>*Type [0] if no fee applies.*</i></li> <li>• In the <b>Service Fee EAN</b> field, type the EAN for the service fee (created at step 1).</li> </ul>	
<p>10. Complete the following steps in the Cancellation Fee section:</p> <ul style="list-style-type: none"> <li>• Select if the fee is a <b>Percentage of Layby Value</b>, a <b>Percentage of o/s Balance</b>, or a <b>Fixed Dollar Amount</b>.</li> <li>• In the adjacent field, type the fee amount. <i>*Type [0] if no fee applies.*</i></li> <li>• In the <b>Cancellation Fee EAN</b> field, type the EAN for the cancellation fee (created at step 1).</li> <li>• Select the <b>Manually Override Fee</b> if required.</li> </ul>	
<p>11. In the Retailers Details text box, type the text that will print at the end of the layby agreement receipt.</p>	
<p>12. In the options section, select the check boxes for the options that will be enabled in your business. <i>*See Hints and Tips.*</i></p>	



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### Hints and Tips

- ✓ **Account options:**
  - You usually select the **New Customer Menu** option, so that customers who aren't existing AR account customers can create a layby. If enabled, the new layby AR account is created as a 'cash account'.
  - You can add **Instructions** and **Customer Status Messages** to an AR account, which display at POS when the account is retrieved.
  
- ✓ You enable the **Customer Search** options so that a POS operator can search for the layby account if the customer doesn't know their layby number or account number.
  
- ✓ **Supervisor override options:**
  - **Layby Fee override** allows the service fee and cancellation fee to be changed.
  - **Layby Limits Override** allows the minimum deposit, minimum payment, and minimum and maximum value that can be put on layby to be overridden.
  - You can use the **default supervisor setting** (set in the Supervisor section), **set Supervisor Settings**, or **Disable the function**.

<p>13. From the POS Configuration screen, select the <b>Account -&gt; Account</b> tabs.</p>	
<p>14. Select the <b>New Customer menu option</b> check box, if you allow creation of new layby accounts at POS.</p>	
<p>15. Complete the following steps in the Customer Accounts section:</p> <ul style="list-style-type: none"> <li>• Select the <b>Display Instructions</b> check box.</li> <li>• Select the <b>Customer Messages</b> check box.</li> </ul> <p><i>*These are the only selections in this section that apply to layby accounts.*</i></p>	
<p>16. From the POS Configuration screen, select the <b>System -&gt; Functional</b> tabs.</p>	
<p>17. Complete the following steps in the Functional options section:</p> <ul style="list-style-type: none"> <li>• Select the <b>Use customer search</b> check box.</li> <li>• If required, select the <b>minimum search characters</b> that must be entered for a search.</li> <li>• Select the <b>Customer Advanced Search</b> check box.</li> </ul>	
<p>18. From the POS Configuration screen, select the <b>Security -&gt; Supervisor Settings</b> tabs.</p>	
<p>19. Complete the following steps to configure the supervisor overrides allowed for layby:</p> <ul style="list-style-type: none"> <li>• In the Security Level section, select the Security Function option <b>Layby Fee Override</b>.</li> <li>• Select the required supervisor intervention.</li> <li>• In the Security Level section, select the Security Function option <b>Layby Limits Override</b>.</li> <li>• Select the required supervisor intervention.</li> </ul> <p><i>*See Hints and Tips.*</i></p>	
	

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**Hints and Tips**

- ✓ You usually return a **layby to stock** (via the BOS) if the customer doesn't finalise the layby within a number of days of receiving a reminder letter.
  - Retail Support can configure the days lapsed in the System Params Editor, using the parameter **Layby\_DaysQualifiedForStock Returns**.
- ✓ The **AutoLaybyCancel** schedule maintenance automatically cancels a layby at POS a number of days after it has been returned to stock; the layby won't exist at POS anymore.
  - Retail Support can configure the days lapsed in the System Params Editor, using the parameter **Layby\_DaysQualifiedForAuto LaybyCancel**.
  - If you don't schedule this task, you can still manually cancel the layby at POS, using the Layby Audit Report to identify which laybys to cancel.
- ✓ If a HOS user, the configuration is sent to the BOS when the HOS scheduled transfer next runs (overnight or export manually).
- ✓ The settings are transferred to POS when **File Transfer/POS Import** next runs, and the operator has logged off/on (if configured during trade).

20. Click <b>Save</b> .	
21. Click <b>Yes</b> to continue. <i>*Or <b>Cancel</b> to return to the settings.*</i>	
22. Click <b>OK</b> .	
23. Click <b>Close</b> to exit Location Setup screen.	
24. Complete the following steps if your business wants laybys that have been returned to stock to be automatically cancelled at POS: <ul style="list-style-type: none"> <li>• From the HOS/BOS <b>Tools</b> menu, select <b>Scheduled Maintenance</b>.</li> <li>• Click <b>New</b>.</li> <li>• In the <b>Program Name</b> field, type, or click  to browse for, the directory [<b>S:\Program Files\Surefire Systems\Surefire BOS\AutoLaybyCancel.exe</b>].</li> <li>• In the <b>Day of Week</b> field, type [0].</li> <li>• In the <b>Time of Day</b> field, type [05:00:00].</li> <li>• Select the <b>Active</b> check box.</li> <li>• Click <b>Save</b>.</li> <li>• Click <b>Close</b>.</li> </ul>	