

Configure Layby

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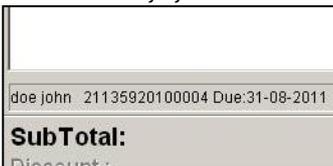
Category	Technical
Course	POS Config.
Version	1.1
Client	Generic
Software	2.18.2

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.



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

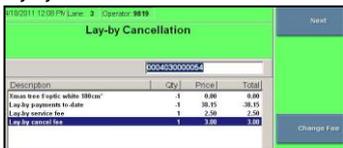
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Hints and Tips

- ✓ 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 20.

- ✓ 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"> • If a Minimum Deposit 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> • If a Minimum Payment 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> • Select the Max \$ (maximum dollar-value) that can be put on layby. • Select the Min \$ (minimum dollar-value) that can be put on layby. 	
<p>9. Complete the following steps in the Service Fee section:</p> <ul style="list-style-type: none"> • Select if the fee is a Percentage or a Fixed Dollar Amount. • In the adjacent field, type the fee amount. <i>*Type [0] if no fee applies.*</i> • In the Service Fee EAN field, type the EAN for the service fee (created at step 1). 	
<p>10. Complete the following steps in the Cancellation Fee section:</p> <ul style="list-style-type: none"> • Select if the fee is a Percentage of Layby Value, a Percentage of o/s Balance, or a Fixed Dollar Amount. • In the adjacent field, type the fee amount. <i>*Type [0] if no fee applies.*</i> • In Cancellation Fee EAN field, type the EAN for the cancellation fee (created at step 1). • Select the Manually Override Fee if required. 	
<p>11. In the Retailers Details tab, type the text that will print at the end of the Layby agreement, layby payment and Layby finalisation receipts. <i>*The layby Pick Slip does not print Retailer Details.*</i></p>	
<p>12. In the Terms and Conditions tab, type the text that will print on the customer copy of the layby receipt (tax invoice). <i>*This text will print after the Retailer Details text.*</i> <i>*This text only prints on the layby creation receipt, not layby payment receipts*.</i></p>	
<p>13. 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>	



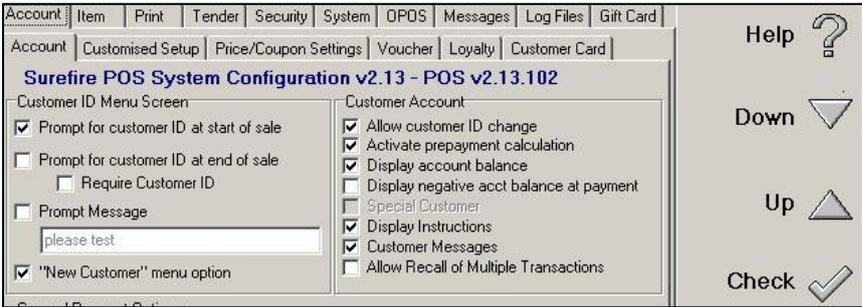
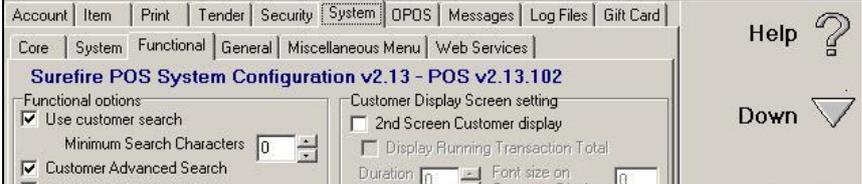
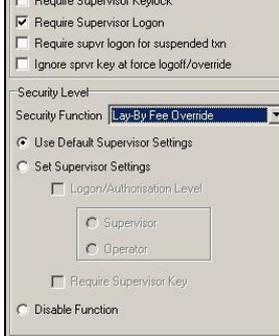
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Hints and Tips

- ✓ **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>14. From the POS Configuration screen, select the Account -> Account tabs.</p>	
<p>15. Select the New Customer menu option check box, if you allow creation of new layby accounts at POS.</p>	
<p>16. Complete the following steps in the Customer Accounts section:</p> <ul style="list-style-type: none"> • Select the Display Instructions check box. • Select the Customer Messages check box. <p><i>*These are the only selections in this section that apply to layby accounts.*</i></p>	
<p>17. From the POS Configuration screen, select the System -> Functional tabs.</p>	
<p>18. Complete the following steps in the Functional options section:</p> <ul style="list-style-type: none"> • Select the Use customer search check box. • If required, select the minimum search characters that must be entered for a search. • Select the Customer Advanced Search check box. 	
<p>19. From the POS Configuration screen, select the Security -> Supervisor Settings tabs.</p>	
<p>20. Complete the following steps to configure the supervisor overrides allowed for layby:</p> <ul style="list-style-type: none"> • In the Security Level section, select the Security Function option Layby Fee Override. • Select the required supervisor intervention. • In the Security Level section, select the Security Function option Layby Limits Override. • Select the required supervisor intervention. <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).

21. Click Save .	
22. Click Yes to continue. <i>*Or Cancel to return to the settings.*</i>	
23. Click OK .	
24. Click Close to exit Location Setup screen.	
25. 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"> • From the HOS/BOS Tools menu, select Scheduled Maintenance. • Click New. • In the Program Name field, type, or click to browse for, the directory [S:\Program Files\Surefire Systems\Surefire BOS\AutoLaybyCancel.exe]. • In the Day of Week field, type [0]. • In the Time of Day field, type [05:00:00]. • Select the Active check box. • Click Save. • Click Close. 	