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SUREfire SYSTEMS

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		Client	Generic
Category	POS	Software	2.18.2.6

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 layb**y.
  • 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:   2110001105028

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

Cancellatión attracts a fee of $5.14
```

Procedure to Create a New Layby

1.	Press **MISC.**	
2.	Press **Layby.**	
3.	Press **Create Lay-by.**	

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

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. *Defaults to the standard fee.**	
9.	Press **Process Layby Payment.**	
10.	Finalise payment as normal. *The amount that will be tendered is the deposit amount.** *A layby agreement receipt and pick slip prints for store-use, along with a customer receipt.* *Layby Terms and Conditions may be set up to only print on the Customer receipt (tax invoice).**	
11.	Ask the customer to sign the **layby agreement** (store copy).	
12.	Attach the **Pick Slip** to the layby parcel.	❏

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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**. *A warning is displayed if final payment is overdue; follow the prompts.*	
5.	**To:** **then:** record a payment — enter the amount being paid. finalise the layby — go to step 6. *The amount defaults to the outstanding amount owing.*	
6.	Press **Process Layby Payment**.	
7.	Finish tendering as normal. *For finalised laybys, a layby completion receipt & a pick slip also print for store-use.*	
8.	Complete the following steps if a finalised layby: • 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.	**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. *The updated information is displayed on screen and in the customers AR account.*	
6.	Press **Back** to return to the Item Menu screen.	❑

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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.**	MISC
2.	Press **Layby**.	Lay-By
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.

To:	then:	
edit the cancellation fee	Press **Change Fee**. Enter the amount. *OR enter [0] to delete the fee.* Press **Enter Fee**.	
continue	press **Next** or **Yes** (as configured).	

The Layby Cancel Fee Menu screen only displays if change fee is enabled in your business.

6.	Finalise the refund as normal. *A layby cancellation receipt and pick slip prints for store-use, along with a customer receipt.*	
7.	Ask the customer to sign the layby cancellation receipt (store-use).	
8.	From the layby from storage. *Use the **Layby Audit report** to identify all cancelled laybys that can be removed from storage.*	❑

Procedure to Cancel Laybys Returned to Stock

1.

If RTS laybys:	then:
are auto-cancelled by the system	go to step 7.
must be manually cancelled	go to step 2.

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