CyberBOS 2004 Lay-A-Way Procedure

Adding a New customer and adding Layaway items to a layaway invoice.

From The point Of Sale Screen the your Clerk.
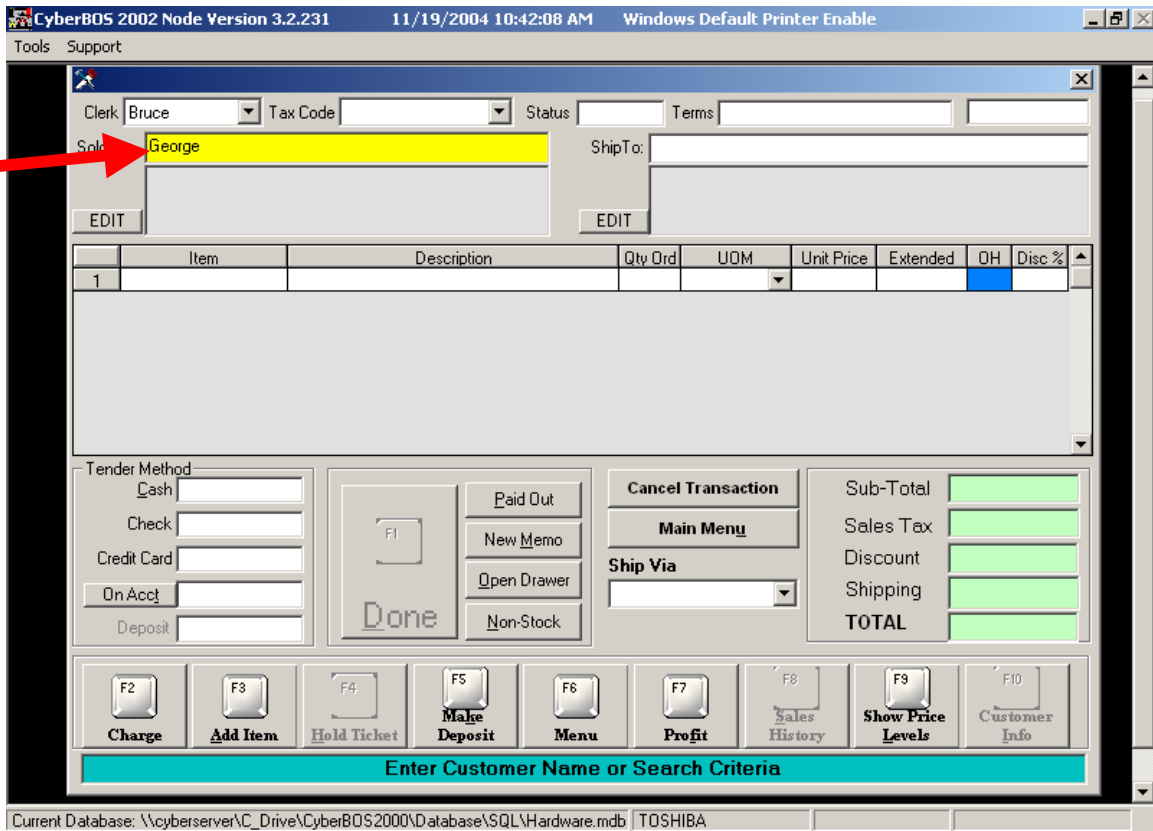
Enter any part of the customer's name, address, phone number, loyalty card number or scan loyalty card at the customer name field. If customer does not exist, add them.

Add Customer On The Fly

New Customer - Quick Add

Address Info

Name	George
Address 1	
Address 2	
City	LaPlata
State	MO	Zip	63549

Phone(Home) [ ]

Phone(Work) [ ]

Status [Cash Only ▼] Shipping [Cash and Carry ▼]

Tax [Sales Tax ▼] Price Level [Retail ▼]

[Save and Exit] [Cancel]

Enter the customers address information.

The new customer will automatically be selected. Press Enter.

Enter Item(s) that you want to put on layaway.

Press enter on the last blank line and answer "Yes" you are finished.

Press F5

The amount of deposit required on this company is 10%, so it automatically calculated that for you. You can enter any amount you desire equal to or greater than this amount. Press Enter.
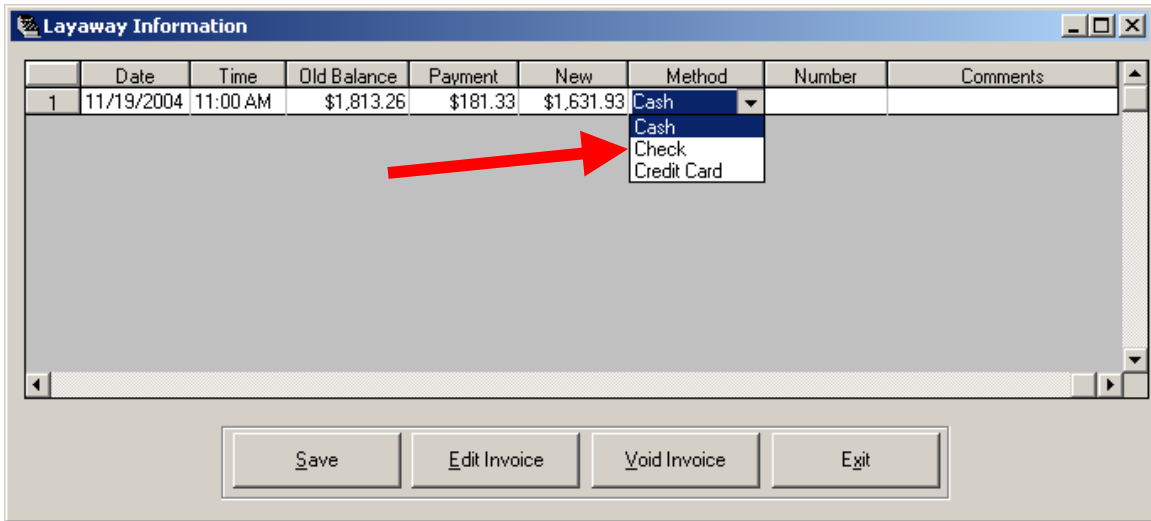
Select Tender Method
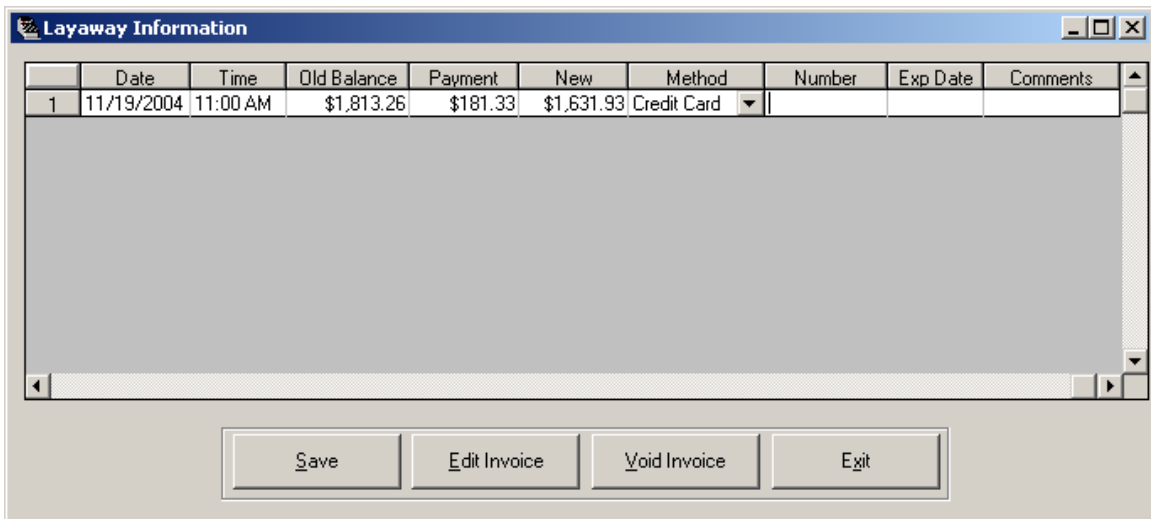
If Credit Card is chosen, it will prompt for Card Number (only enter the last 4 digits) then the Expiration date (example 0106 for Jan 2006) do not use dashes or slashes. You can choose to add a comment (optional).
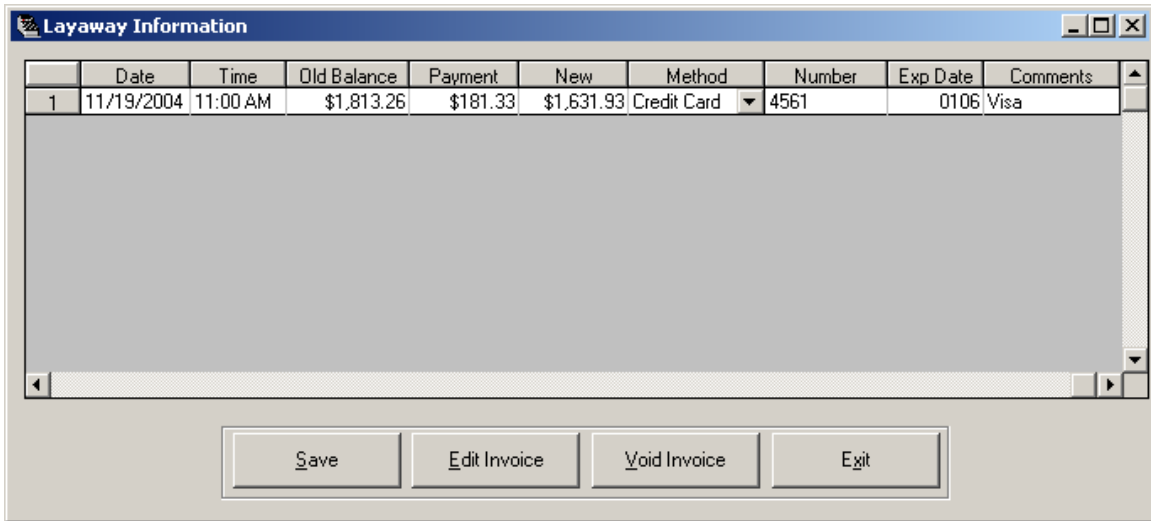
Click on Save or press enter, it will prompt for Save if you press enter.
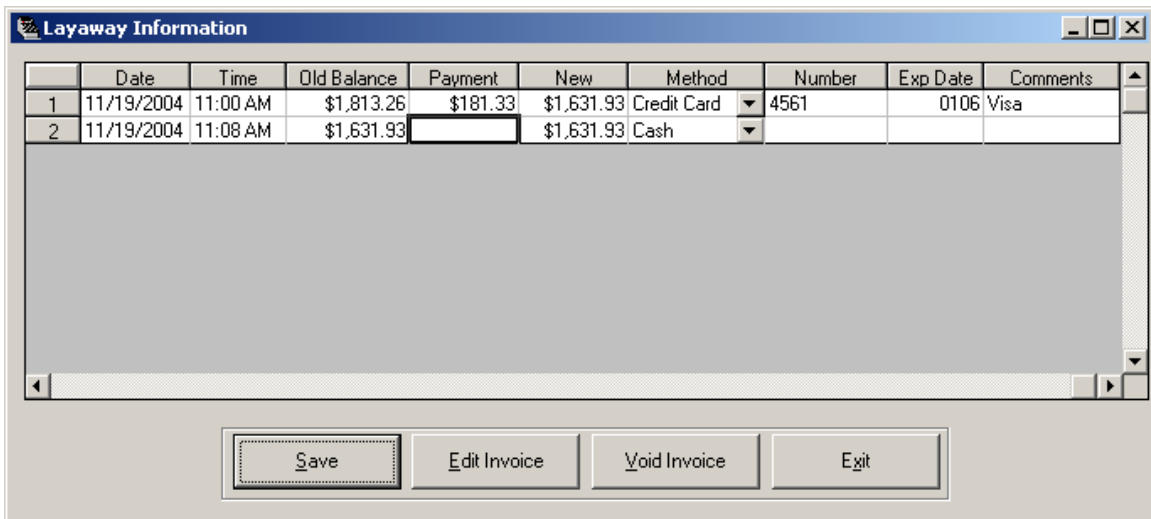
It will then display the total amount due after this deposit. Saving will delete the last line, unless you need to make another payment with a different Tender Method.
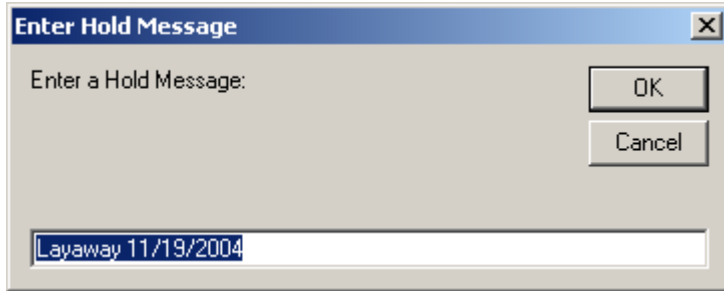
It will then default to the above Hold Message, you may want to change or add to it at this time.
Press enter

It will prompt you weather or not to print. We recommend that you do print the layaway invoice so the customer can keep for their records.

Adding deposits to an existing Layaway Invoice

Choose your clerk, press enter.

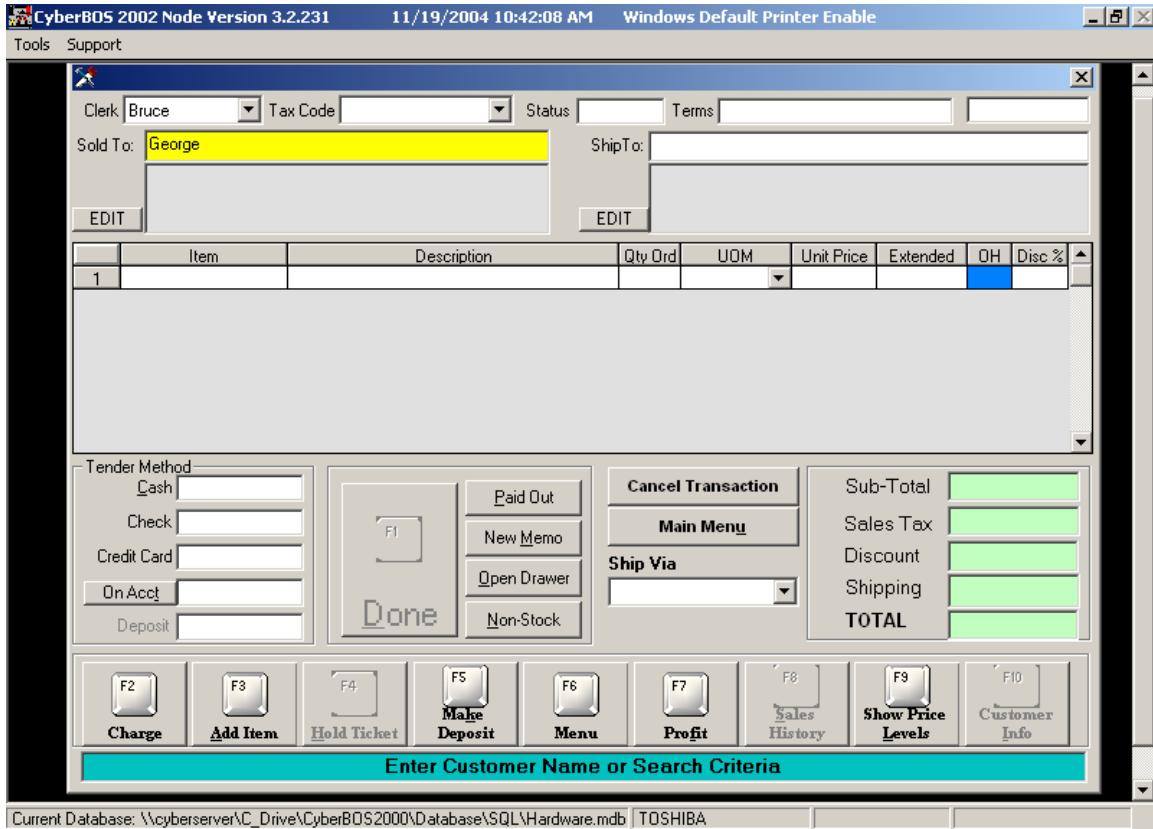Enter any part of the customer's name, address, phone number, loyalty card number or scan loyalty card at the customer name field. If customer does not exist, add them.

Customer Search (Search By City, Zip, Account Nunber, Name Or Phone Number)

George

Search

Acc Num	Name	Street Address	City	Phone	Has Subs
1380	George Bush	1600 Pennsylvani	Washington DC	800-555-1212	☐
1295	George Estes	3280 Wild Horse D	Foristell, MO 63348	(417) xxx-xxxx	☐
430	George Looney			( ) 788-2705	☐
842	George Spicer	The Case Works	Oldfield NO 65720	( ) 751-2111	☑
1136	George Wilson	P. O. Box 117	Ash Grove, MO 65604	(417) 672-3890	☐

Select   Add Customer   ☐ Include Disabled Accounts   Cancel

Select Customer from list, and press enter.

Hold Ticket Selection

Name		Acc Num	SubAccount
George Bush		1380	NONE

Invoice	Total	Clerk	Message	Date
73824	1813.26		Layaway 11/19/2004	11/19/2004

Select Hold Ticket Or Hit 0 For New Ticket

Select   Cancel

Once customer is selected, it will automatically list all layaway invoices. Our system is designed to allow unlimited layaway invoices per customer.
Select the Layaway you would like to add or edit.

Layaway Information

	Date	Time	Old Balance	Payment	New	Method	Number	Exp Date	Comments
1	11/19/2004	11:00 AM	$1,813.26	$181.33	$1,631.93	Credit Card	4561	0106	Visa
2	11/19/2004	11:22 AM	$1,631.93		$1,631.93	Cash			

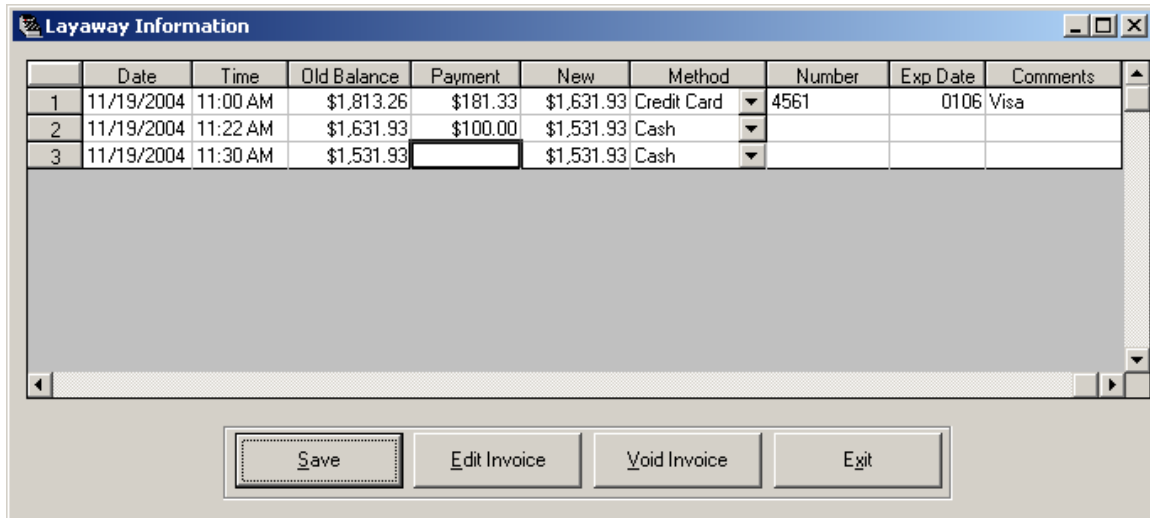Save   Edit Invoice   Void Invoice   Exit

The system will automatically list the Layaway payments and allow you to add a payment.

Edit Invoice allows editing.
Void Invoice will void the Layaway Invoice and will prompt to assure that you really want to do this and will tell you how much to refund the customer based on the deposits and less any penalties.
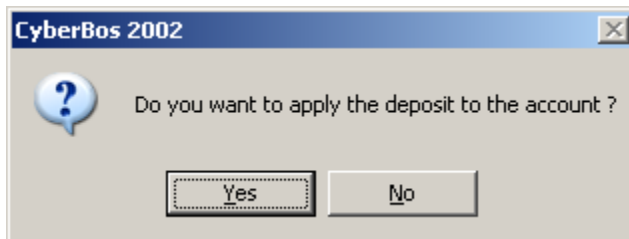
Exit will leave this window with no changes.

	Date	Time	Old Balance	Payment	New	Method	Number	Exp Date	Comments
1	11/19/2004	11:00 AM	$1,813.26	$181.33	$1,631.93	Credit Card	4561	0106	Visa
2	11/19/2004	11:22 AM	$1,631.93	$100.00	$1,531.93	Cash			
3	11/19/2004	11:30 AM	$1,531.93		$1,531.93	Cash			

Layaway Information

Save   Edit Invoice   Void Invoice   Exit

Enter the payment amount then Save.

Continue taking payments until it is paid off. Here's what happens when you make the final payment.

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? Do you want to apply the deposit to the account ?

Yes   No

Answer Yes

It will then print the final Invoice..