



Layaway Guide

for the **V6 System** Software

November 2018

The Retail Technology Group (RTG) recommends completing the procedures in this guide to set up and utilize the layaway features in the V6 system software.

Contents

Overview	3
Create a Layaway Policy Letter	4
Link the Letter to the Layaway Function	6
Set Up a Restocking Fee Function	8
Create a Restocking Fee Item Code	9
Create a Restocking Fee Tender Key	10
Create a Layaway	12
Accept an Additional Layaway Deposit	14
Finalize the Sale of a Layaway	16
Correct a Layaway Issue	18
Void a Layaway	19
Refund the Entire Deposit Amount with No Restocking Fee	20
Refund the Deposit Minus a Restocking Fee (Item Code)	21
Refund the Deposit Minus a Restocking Fee (Tender Key)	22

Notices

Copyright © 2018 Retail Technology Group.
940 Industrial Drive, Suite 107
Sauk Rapids, MN 56379
1-800-547-7120
All rights reserved.

General

No part of this document may be reproduced, distributed, performed, displayed, or used to prepare a derivative work without the prior and express written consent of Retail Technology Group (“RTG”). The software described in this document is furnished under a license agreement and may be used only in accordance with the terms and conditions of the license agreement. Information in this document is subject to change without notice, and RTG assumes no responsibility for errors.

Trademarks and Credits

RTG, AXIS, AXIS Retail Management System (AXIS RMS), AXIS Data Center, AXIS Register, and AXIS E4473 are trademarks of RTG and shall not be used without the express written permission of RTG.

Other trademarks, such as QuickBooks, are not being used as a trademark herein and are the property of the respective owners.

Legal Counsel

This program, printed documentation, and documents should not be used as a substitute for professional advice in specific situations. The procedures, images, and examples in this document are for illustrative purposes only and may not be applicable in your setting due to differences in preference, settings, and/or state and local regulations.

The following notice is required by law:

RTG products and services are not a substitute for the advice of an Attorney. You are encouraged to seek the advice of your own attorney concerning the use and legality of this program, documentation, and forms.

Publication Information

Layaway Guide for the V6 System Software
November 2018

Overview

The following circumstances are required to utilize the layaway features:

- The FOM application must be enabled.
- The POS application must be online.
- The POS application must be able to communicate with the IMS application.

Set Up Layaway Policies

Complete the following procedures to prepare the tools the POS and IMS applications will use to process layaways:

- [Create a Layaway Policy Letter](#)
- [Link the Letter to the Layaway Function](#)
- [Set Up a Restocking Fee Function](#)

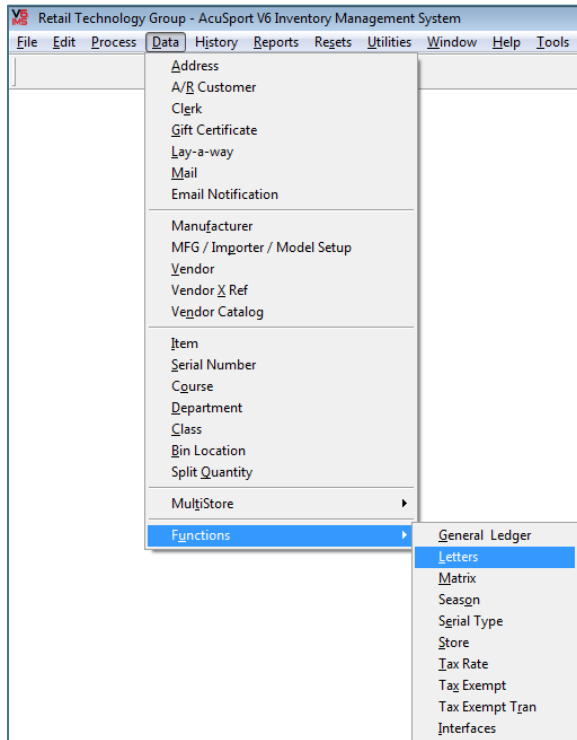
Use Layaway Features

- [Create a Layaway](#)
- [Accept an Additional Layaway Deposit](#)
- [Finalize the Sale of a Layaway](#)
- [Correct a Layaway Issue](#)
- [Void a Layaway](#)

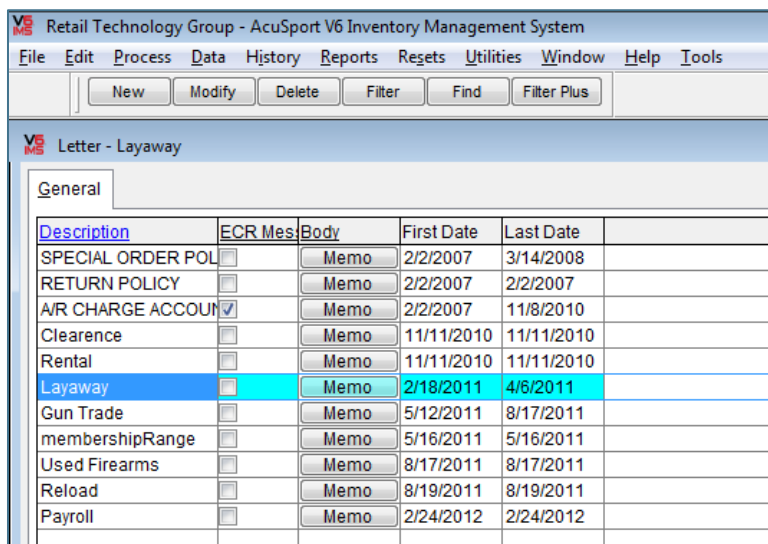
Create a Layaway Policy Letter

Complete the following procedure to create a layaway policy letter to print on the customer's receipt at the POS.

1. Log in to the **IMS** application.



2. Select **Data > Functions > Letters** from the menu bar to display the **Letter** screen.



3. Complete one of the following procedures to display the **Add Letter** (or **Edit Letter**) window as appropriate:
 - If the list does not contain a layaway letter, click the **New** button to display the **Add Letter** window.
 - If the list contains an existing layaway letter,
 1. Click the letter to select it.
 2. Click the **Modify** button to display the **Edit Letter** window.

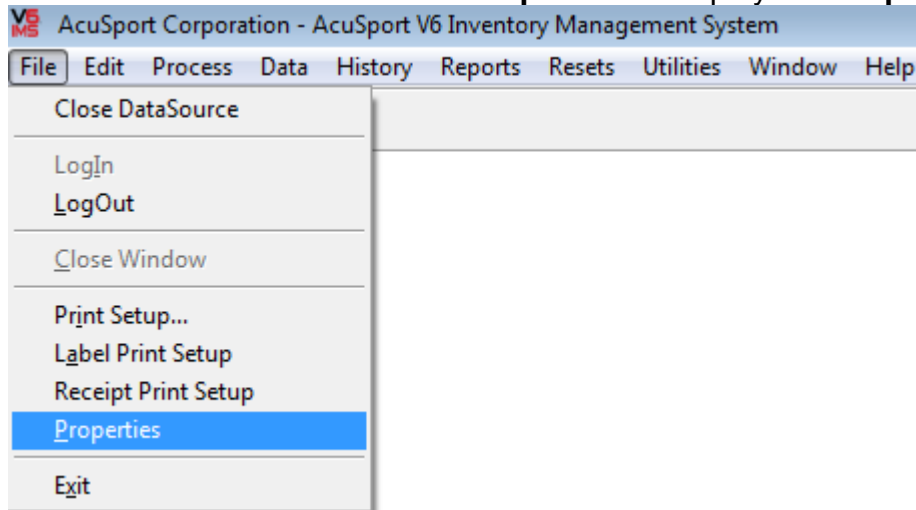
The screenshot shows a window titled "Add Letter" with two tabs: "General" and "Body". The "General" tab is selected. Inside the "General" tab, there is a "Description" text field, a "Type" dropdown menu, and an "Ecr_mssg" checkbox. To the right of these fields are "First Date" and "Last Date" fields, both displaying "11/19/2014". At the bottom of the window are "Add" and "Close" buttons.

4. Enter/edit the name of the letter (i.e., "Layaway") in the **Description** field.
5. Complete the other fields on the **General** tab.
6. Enter/edit letter text on the **Body** tab.
7. Checking the **Ecr_mssg** checkbox enables the letters to print to an invoice printer besides the receipt printer.
8. Click the **Add** (or **OK**) button to close the window and add/update the letter on the list.

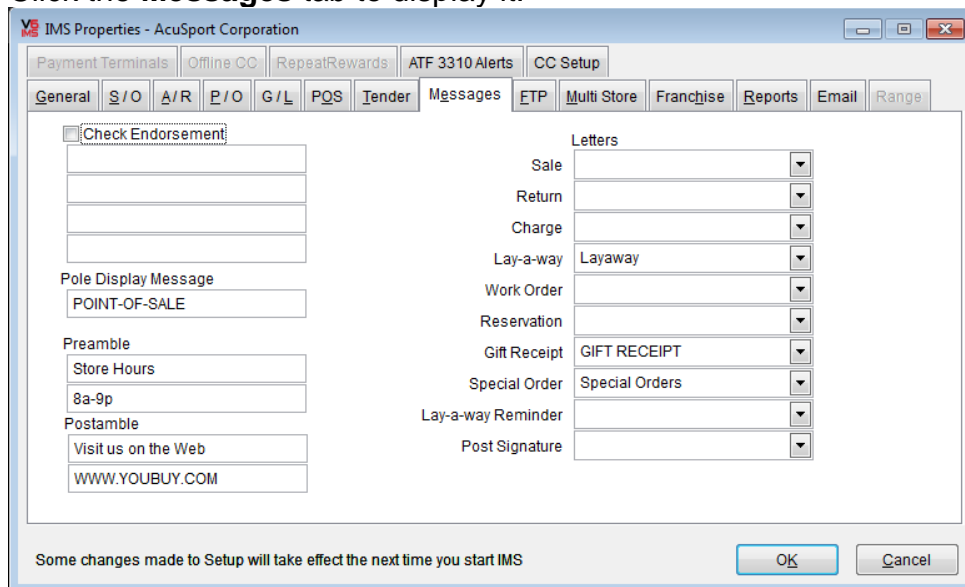
Link the Letter to the Layaway Function

Complete the following procedure to create a link between the layaway policy letter to the layaway function so the letter will print on layaway receipts.

1. Log in to the **IMS** application.
2. Click the **File** button then select **Properties** to display the **Properties** window.

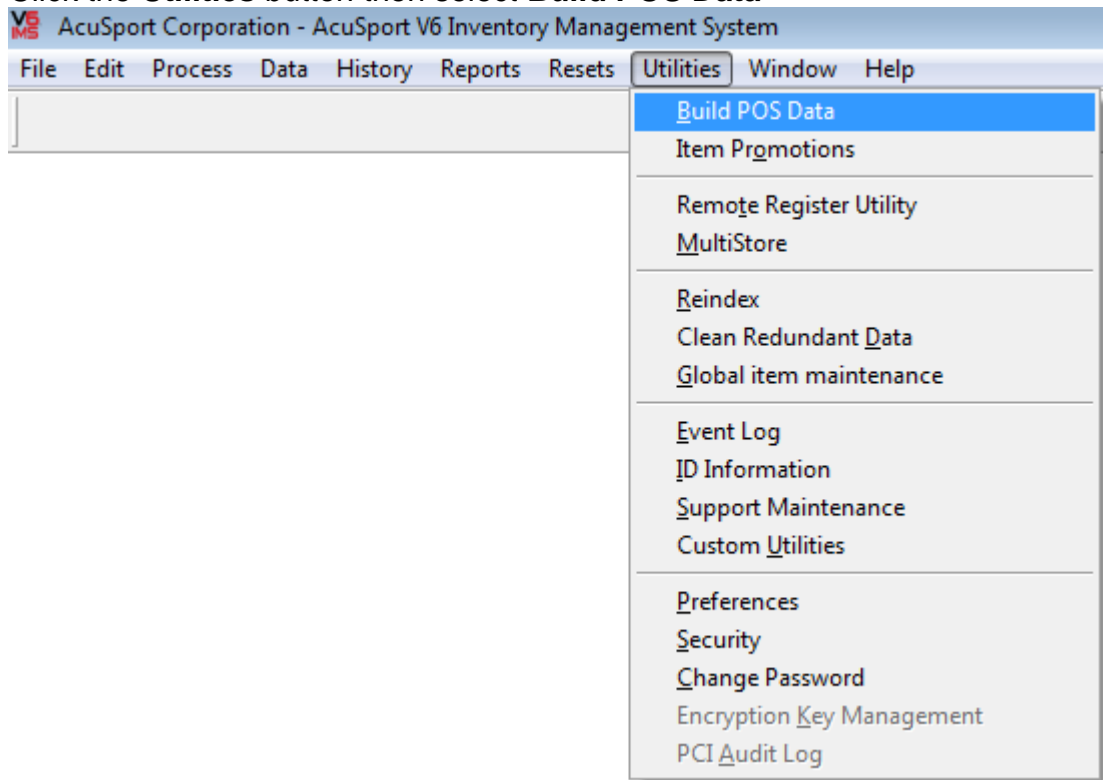


3. Click the **Messages** tab to display it.



4. Select the layaway letter from the **Lay-a-way** field's dropdown menu.
5. Click the **OK** button to close the **Properties** window.

6. Click the **Utilities** button then select **Build POS Data**



7. Log in to the **POS** application.

- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)
- ▶ Select **F6** or **Download**

Set Up a Restocking Fee Function

Complete either of the following procedures to establish a method for assigning a restocking fee to a cancelled/voided layaway.

- [Create a Restocking Fee Item Code](#)
- [Create a Restocking Fee Tender Key](#)

Create a Restocking Fee Item Code

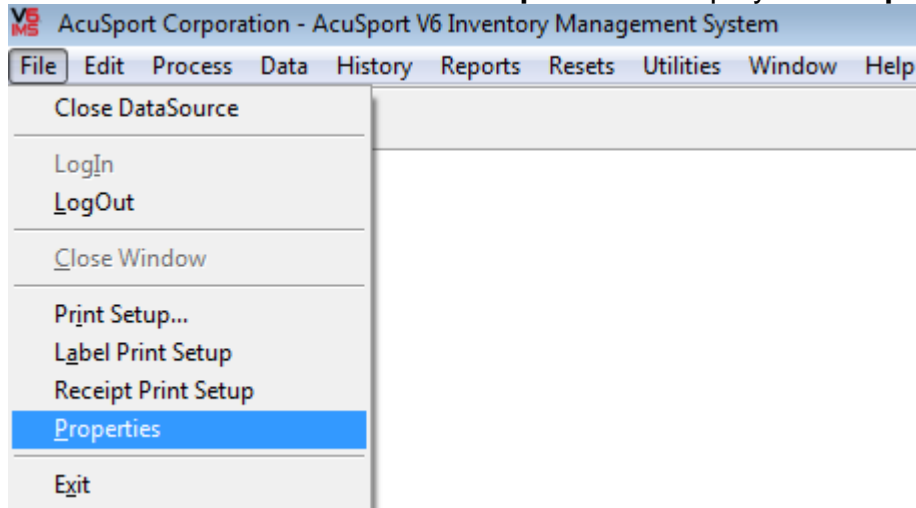
1. Log in to the **IMS** application.
2. Select **Data > Item** from the menu bar to display the **Item** screen.
3. Click the **New** button to display the **Add Item** window.

4. Enter a name for the restocking fee in the **Description 1** field.
5. Enter (or Lookup and select) an appropriate class for the fee in the **Class** field.
6. Select the layaway letter from the **Description** field's dropdown menu in the Letter section.
7. If desired, complete the following procedure to assign a standard, flat amount for the fee:
 1. Click the **Cost/Price** tab to display it.

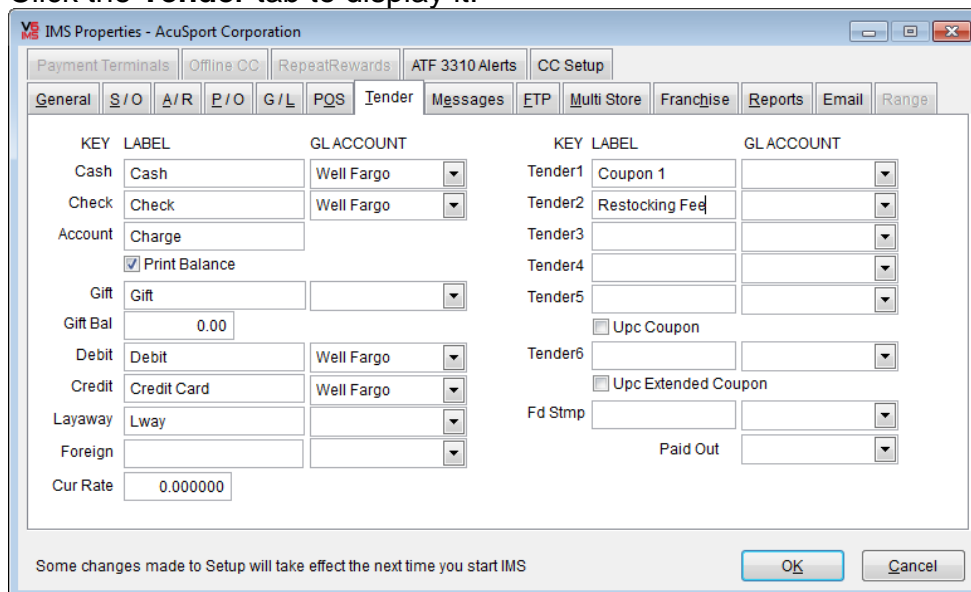
2. Enter the fee amount in the **Price 1** field.
8. Click the **Add** button to save the fee.
9. Click the **Close** button to close the **Add Item** window.

Create a Restocking Fee Tender Key

1. Log in to the **IMS** application.
2. Click the **File** button then select **Properties** to display the **Properties** window.

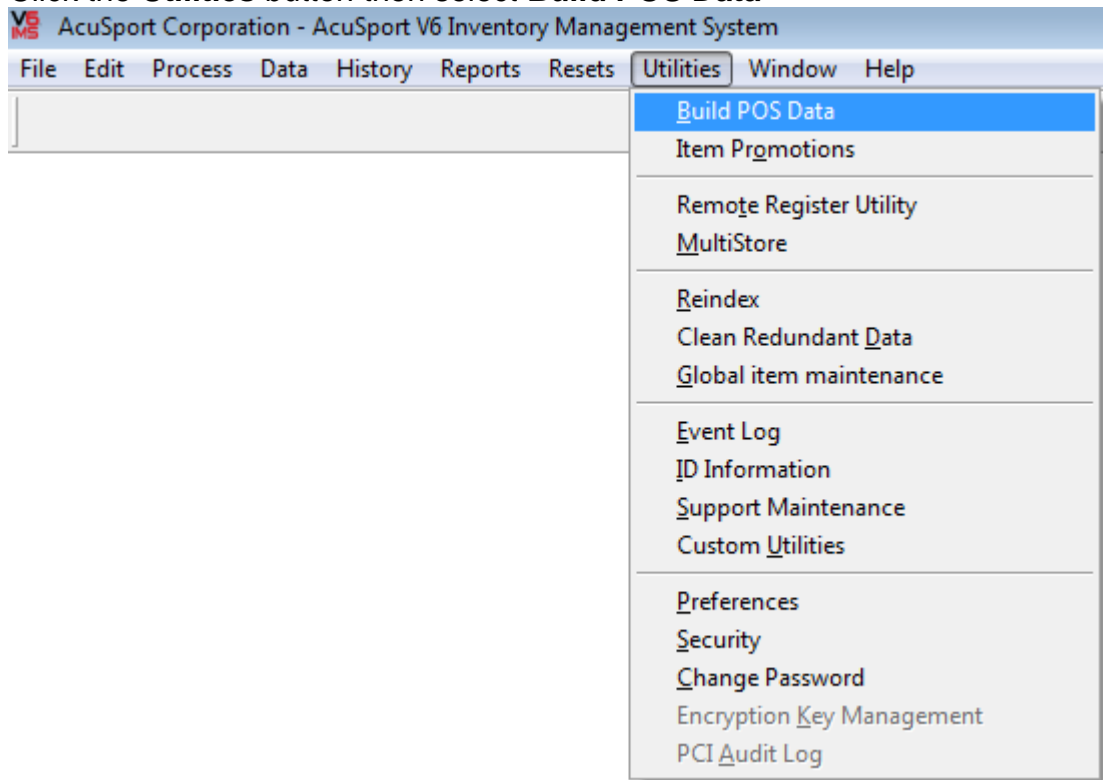


3. Click the **Tender** tab to display it.



4. Locate an unused tender (**Tender 1 – Tender 6**) field.
5. Enter a name for the restocking fee in the appropriate tender field.
6. Click the **OK** button to close the **Properties** window.

7. Click the **Utilities** button then select **Build POS Data**



8. Log in to the **POS** application.

- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled "**Go Online**," click it to send the POS online. (If it is labeled "**Go Offline**," the POS is already online.)
- ▶ Select **F6** or **Download**

Create a Layaway

Complete the following procedure to place an item on layaway.

1. Log in to the **POS** application.

- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled “**Go Online**,” click it to send the POS online. (If it is labeled “**Go Offline**,” the POS is already online.)

2. Create a transaction and add the item(s) to be placed on layaway.

Itemcode	Desc1	Price	Discount	Quantity	Net Sale	TaxcdDesc2
7132855	31AS235790/722 SNOWTHROWER 5H	449.99	0.00	1.00	449.99	7132855

3. Click the **Total (F10)** button to display the **Tender** window.

Type	Amount

4. Enter the amount of the layaway deposit in the **Enter Amount Tender** field.
5. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) to add the entered amount to the list in the **Tender** window.

- ▶ Sales tax on layaway items will be treated as a cash sale for tax payment purposes.

6. Click the **Lway (F9)** button to display the **Lay-a-way Tender** window.

- ▶ The system automatically assigns a layaway number to the layaway.

V6 Lay-a-way Tender

Lay-a-way # 0999810019 Mail # 2000

First Name Mike

Last Name Abel

Address 1 123 Windmill Rd

Address 2

City, St Zip Sauk Rapids MN 56333

Phone 320 251 8877

Email

Deposit 125.0000 Balance 353.1100

UDF C5

UDF D2 //

OK Cancel

7. Enter/edit information as needed.
8. Click the **OK** button to close the window.

Accept an Additional Layaway Deposit

Complete the following procedure to apply an additional deposit payment to an existing layaway.

1. Log in to the **POS** application.

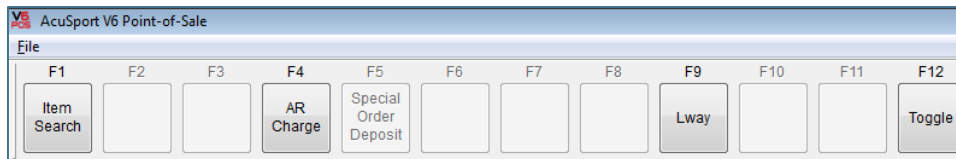
- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled “**Go Online**,” click it to send the POS online. (If it is labeled “**Go Offline**,” the POS is already online.)

2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

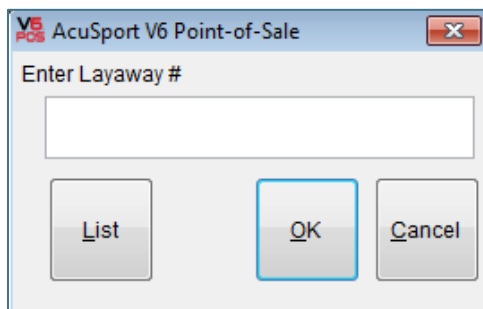
- ▶ If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.



3. Click the **Rec on Account (F2)** button to display a different set of buttons.



4. Click the **Lway (F9)** button to display the layaway number entry window.



5. Enter the layaway number in the **Enter Layaway #** field (or click the **List** button and select the layaway from the list).
6. Click the **OK** button to display the **Layaway R/A** window.

V6 Layaway R/A

Layway # 0999810019

First Name Mike

Last Name Abel

Address 1 123 Windmill Rd

Address 2

City, St Zip Sauk Rapids MN 56333

Date 11/19/2014 Payment 11/19/2014

Deposit 125.00 Balance 353.11

RAAmount \$ 0.00

OK Cancel

7. Enter the amount of the additional layaway deposit in the **RA Amount** field.
8. Click the **OK** button to display the **R/A Payments** window.

V6 AcuSport V6 Point-of-Sale

File

F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Help Cash Check Gift Void Tran Credit Card Toggle

R/A Payments

Enter Amount Tender \$ 0.00 Clerk JERRY H.

Amount to Tender 75.00

Total 75.00 Reg No. 99

Type	Amount

9. Enter the amount of the layaway deposit in the **Enter Amount Tender** field.
10. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) to update the account.

Finalize the Sale of a Layaway

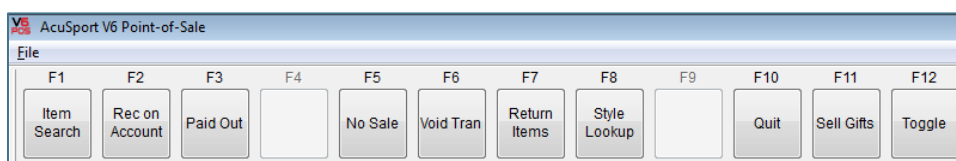
Complete the following procedure to sell the layaway item

1. Log in to the **POS** application.

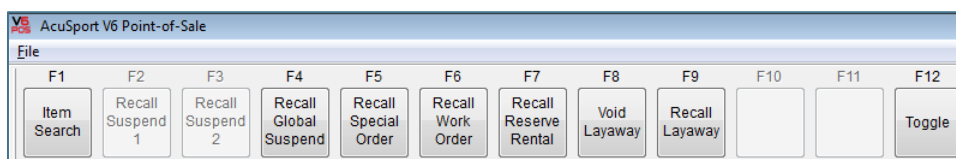
- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled “**Go Online**,” click it to send the POS online. (If it is labeled “**Go Offline**,” the POS is already online.)

2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

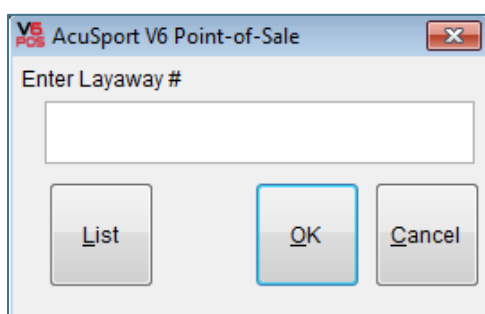
- ▶ If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.



3. Click the **Toggle (F12)** button twice to display the recall buttons.



4. Click the **Recall Layaway (F9)** button to display the layaway number entry window.



5. Enter the layaway number in the **Enter Layaway #** field (or click the **List** button and select the layaway from the list).

- ▶ The layaway number is printed on the customer's receipt.

6. Click the **OK** button to display the **Sales Entry** window.

AcuSport V6 Point-of-Sale

File

F1 Item Search F2 Quantity F3 Discount F4 OverRide F5 Clerk F6 Void Item F7 Return Items F8 Style Lookup F9 Subtotal F10 Total F11 Journal F12 Toggle

Sales Entry

Enter Item Code Subtotal 449.99 Clerk JERRY H. Customer Mike Abel

Units Sold: 1 QoH 0.00 Reg No. 99

Itemcode	Desc1	Price	Discount	Quantity	Net Sale	TaxcdDesc2
7132855	31AS235790/722 SNOWTHROWER 5H	449.99	0.00	1.00	449.99	1 7132855

7. If desired, complete the following procedure to add items to this transaction:

1. Add the additional item(s).
2. Click the **Subtotal (F9)** button to display the **Subtotal** window.

► The **Subtotal** window does not include the amount due for the layaway.

AcuSport V6 Point-of-Sale

File

F1 Help F2 % OPEN Discount F3 A/R Discount F4 Suspend F5 Void Sale F6 Sale Entry F7 Total F8 Toggle

Subtotal

Subtotal 0.00 Clerk JERRY H. Customer Mike Abel

Discs 0.0000 0.0000 Tax 1 0.00 0.00 Tax 2 0.00 0.00 Tax 3 0.00 0.00

Total 0.00 Reg No. 99

Units Sold: 1

8. Click the **Total (F10)** button to display the **Tender** window.

► The **Tender** window displays the amount due for the layaway (and any recently added items). The list displays the balance due and total deposits paid for the layaway.

AcuSport V6 Point-of-Sale

File

F1 Help F2 Cash F3 Check F4 A/R Charge F5 Gift F6 Void Tran F7 Credit Card F8 Lway F9 Issue Gifts Credit F10 Toggle

Tender

Enter Amount Tender \$ 0.00 Subtotal 0.00 Clerk JERRY H. Customer Mike Abel

Amount to Tender 278.11 Tax 1 0.00 Tax 2 0.00 Tax 3 0.00

Total 0.00 Reg No. 99

Previous Balance 278.11

Type	Amount
Previous Bal	-278.11
Deposit	200.00

9. Enter the amount due in in the **Enter Amount Tender** field.
10. Click the appropriate tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) to complete the transaction.

Correct a Layaway Issue

Complete the following procedure as needed to correct a layaway that was incorrectly finalized.

1. Log in to the **POS** application.
 - ▶ If the FOM is not currently enabled, enable it now.
 - ▶ If the **F11** button is labeled “**Go Online**,” click it to send the POS online. (If it is labeled “**Go Offline**,” the POS is already online.)
2. Create a return and add the item(s) from the layaway.
3. Click the same tender button (e.g. **Cash (F2)**, **Check (F3)**, etc.) that was used to finalize the layaway.
4. Create a new layaway transaction and add the item(s) from the original layaway.
5. Click the same tender button used for the return.

Void a Layaway

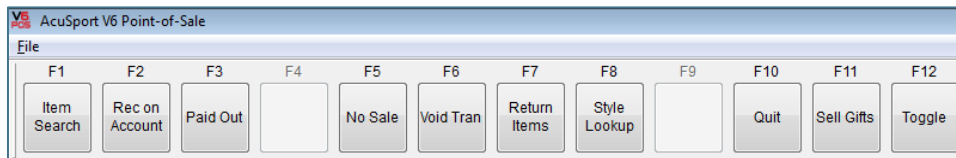
Complete the following procedure to cancel a layaway.

1. Log in to the **POS** application.

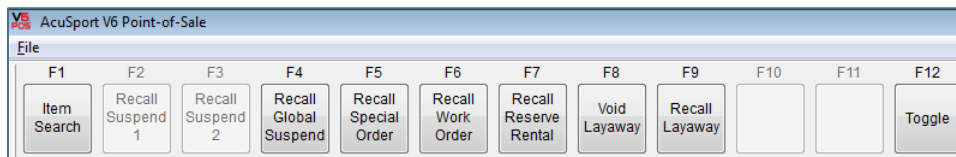
- ▶ If the FOM is not currently enabled, enable it now.
- ▶ If the **F11** button is labeled “**Go Online**,” click it to send the POS online. (If it is labeled “**Go Offline**,” the POS is already online.)

2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

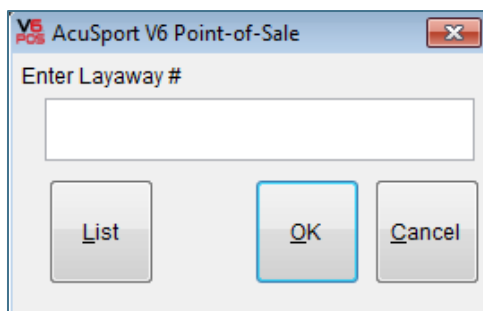
- ▶ If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.



3. Click the **Toggle (F12)** button twice to display the recall buttons.



4. Click the **Void Layaway (F8)** button to display the layaway number entry window.



5. Enter the layaway number in the **Enter Layaway #** field (or click the **List** button and select the layaway from the list).

- ▶ The layaway number is printed on the customer's receipt.

6. Click the **OK** button to display the **Tender** window.

- ▶ The **Amount to Tender** field displays the total deposit amount.

[illegible]

7. Complete one of the following procedures as appropriate to issue a refund:
- [Refund the Entire Deposit Amount with No Restocking Fee](#)
 - [Refund the Deposit Minus a Restocking Fee \(Item Code\)](#)
 - [Refund the Deposit Minus a Restocking Fee \(Tender Key\)](#)

Refund the Entire Deposit Amount with No Restocking Fee

1. Enter the amount from the **Amount to Tender** field in in the **Enter Amount Tender** field.
2. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

- The window displays the amount to be refunded (total deposit).

AcuSport V6 Point-of-Sale

File

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Help											Toggle

Point-of-Sale

Enter Item Code

Clerk **JERRY H.**
Customer **Mike Abel**

Cash Change: \$125.00

Reg No. 99

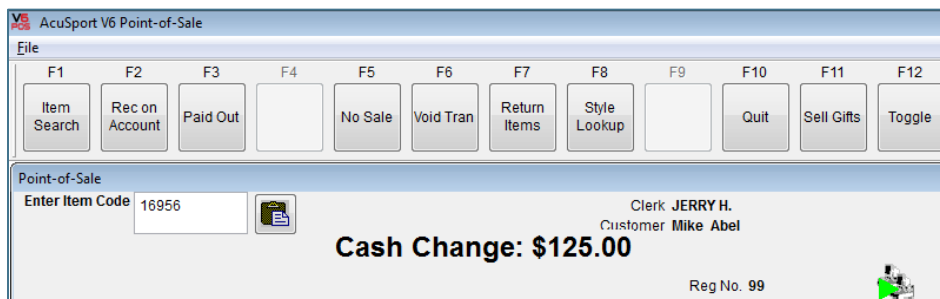
3. Issue a refund in the amount shown.

Refund the Deposit Minus a Restocking Fee (Item Code)

► Refer to [Create a Restocking Fee Item Code](#) for more information.

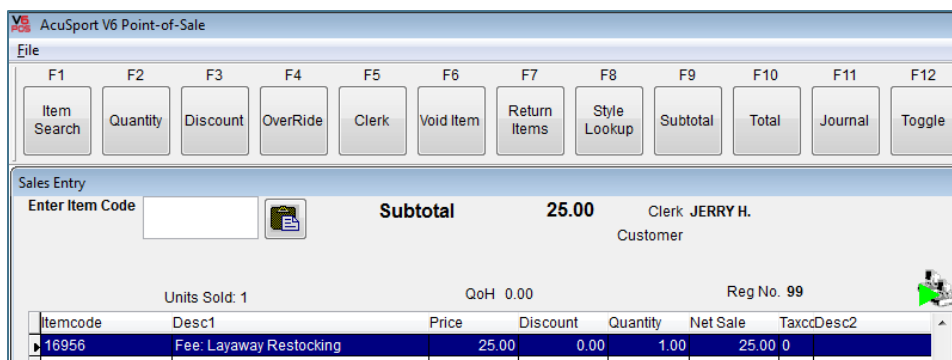
1. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

► If the PIN entry and mail number entry windows appear, complete them.



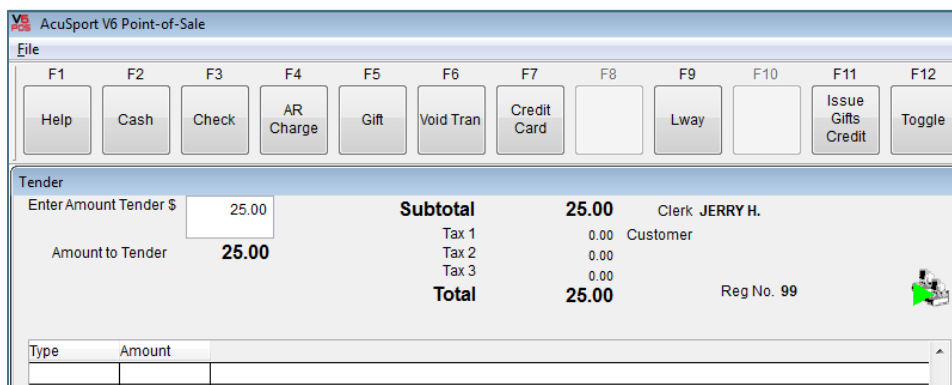
The screenshot shows the 'AcuSport V6 Point-of-Sale' window. At the top, there is a menu bar with 'File' and a row of function keys F1 through F12. Below this is a grid of buttons: F1 (Item Search), F2 (Rec on Account), F3 (Paid Out), F4 (empty), F5 (No Sale), F6 (Void Tran), F7 (Return Items), F8 (Style Lookup), F9 (empty), F10 (Quit), F11 (Sell Gifts), and F12 (Toggle). The main area is titled 'Point-of-Sale'. It contains an 'Enter Item Code' field with the value '16956' and a small icon. To the right, it says 'Clerk JERRY H.' and 'Customer Mike Abel'. In the center, it displays 'Cash Change: \$125.00'. At the bottom right, it shows 'Reg No. 99' and a small printer icon.

2. Remember the change amount shown in the window for future reference.
3. Enter the restocking fee item code in the **Enter Item Code** window.
4. Press the **Enter** key to add the fee to the list on the **Sales Entry** window.



The screenshot shows the 'AcuSport V6 Point-of-Sale' window in the 'Sales Entry' mode. The function key buttons are: F1 (Item Search), F2 (Quantity), F3 (Discount), F4 (OverRide), F5 (Clerk), F6 (Void Item), F7 (Return Items), F8 (Style Lookup), F9 (Subtotal), F10 (Total), F11 (Journal), and F12 (Toggle). The main area is titled 'Sales Entry'. It contains an 'Enter Item Code' field with a small icon. To the right, it says 'Subtotal 25.00', 'Clerk JERRY H.', and 'Customer'. Below this, it shows 'Units Sold: 1', 'QoH 0.00', and 'Reg No. 99'. At the bottom, there is a table with columns: Itemcode, Desc1, Price, Discount, Quantity, Net Sale, and TaxcdDesc2. The table has one row: '16956 Fee: Layaway Restocking', '25.00', '0.00', '1.00', '25.00 0'.

5. Click the **Total (F10)** button to display the **Tender** window.



The screenshot shows the 'AcuSport V6 Point-of-Sale' window in the 'Tender' mode. The function key buttons are: F1 (Help), F2 (Cash), F3 (Check), F4 (AR Charge), F5 (Gift), F6 (Void Tran), F7 (Credit Card), F8 (empty), F9 (Lway), F10 (empty), F11 (Issue Gifts Credit), and F12 (Toggle). The main area is titled 'Tender'. It contains an 'Enter Amount Tender \$' field with the value '25.00'. To the right, it says 'Subtotal 25.00', 'Clerk JERRY H.', and 'Customer'. Below this, it shows 'Amount to Tender 25.00'. To the right of this, it lists 'Tax 1 0.00', 'Tax 2 0.00', and 'Tax 3 0.00'. At the bottom, it shows 'Total 25.00' and 'Reg No. 99'. At the very bottom, there is a table with columns: Type, Amount, and a small printer icon.

6. Enter the change amount (from the **Point-of-Sale** window) in the **Enter Amount Tender** field.

- Click the **Cash (F2)** button to display the **Point-of-Sale** window.

► The window displays the amount to be refunded (total deposit minus the restocking fee).

- Issue a refund in the amount shown.

Refund the Deposit Minus a Restocking Fee (Tender Key)

► Refer to [Create a Restocking Fee Tender Key](#) for more information.

- Click the **Toggle (F12)** button as needed to display the **Restocking Fee** tender key (button).

- Enter the amount of the restocking fee in the **Enter Amount Tender** field.
- Click the **Restocking Fee** button to add the fee to the list in the **Tender** window and update the amount shown in the **Amount to Tender** field.

Type	Amount
Deposit	125.00
Lway	-353.11
Restocking F	-25.00

- Click the **Cash (F2)** button to display the **Point-of-Sale** window.

► The window displays the amount to be refunded (total deposit minus the restocking fee).


AcuSport V6 Point-of-Sale

File

F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Help Toggle

Point-of-Sale

Enter Item Code: 

Clerk JERRY H.
Customer Mike Abel

Cash Change: \$100.00

Reg No. 99

5. Issue a refund in the amount shown.