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.

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Legal Counsel

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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](#)
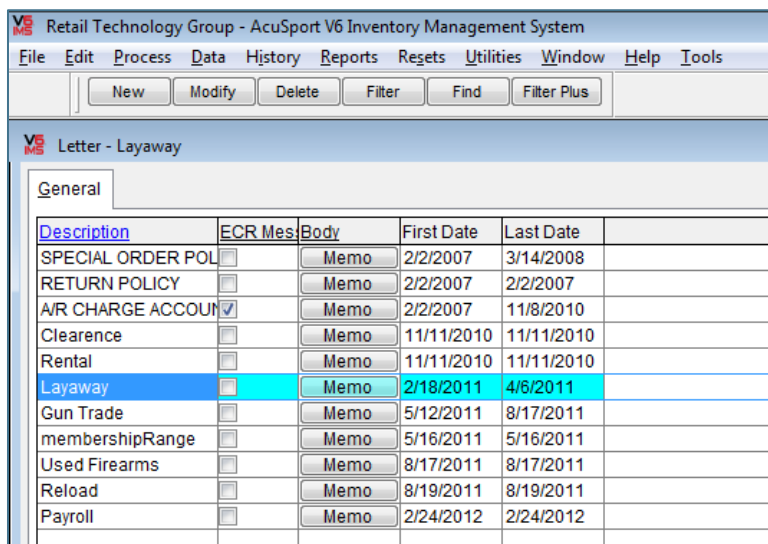- [Correct a Layaway Issue](#)
- [Void a Layaway](#)

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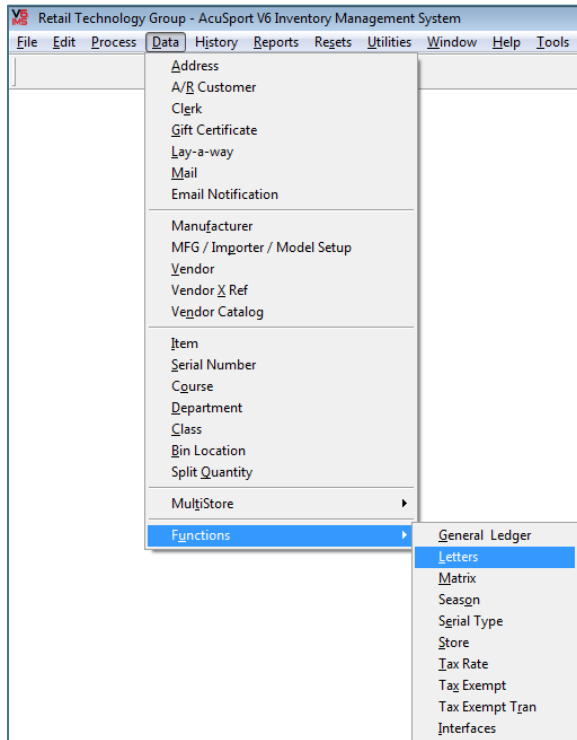
2. Select **Data > Functions > Letters** from the menu bar to display the **Letter** screen.

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.

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.
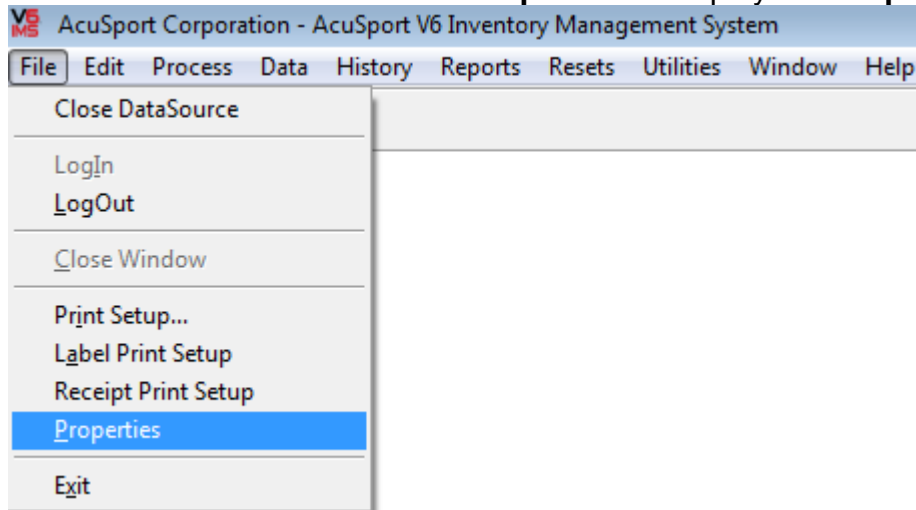
3. Click the **Messages** tab to display it.
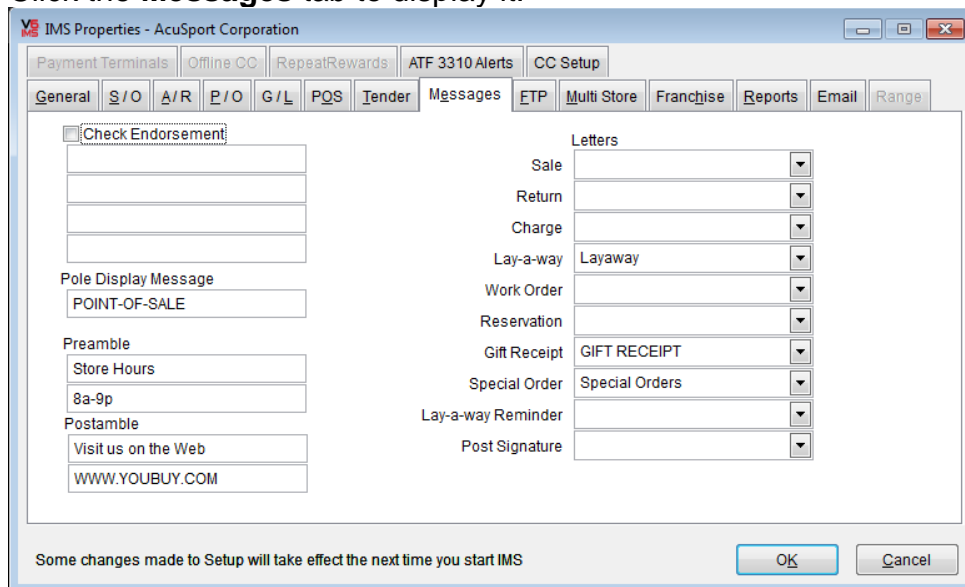
4. Select the layaway letter from the **Lay-a-way** field's dropdown menu.

5. Click the **OK** button to close the **Properties** window.

6. Click the **Utilities** button then select **Build POS Data**
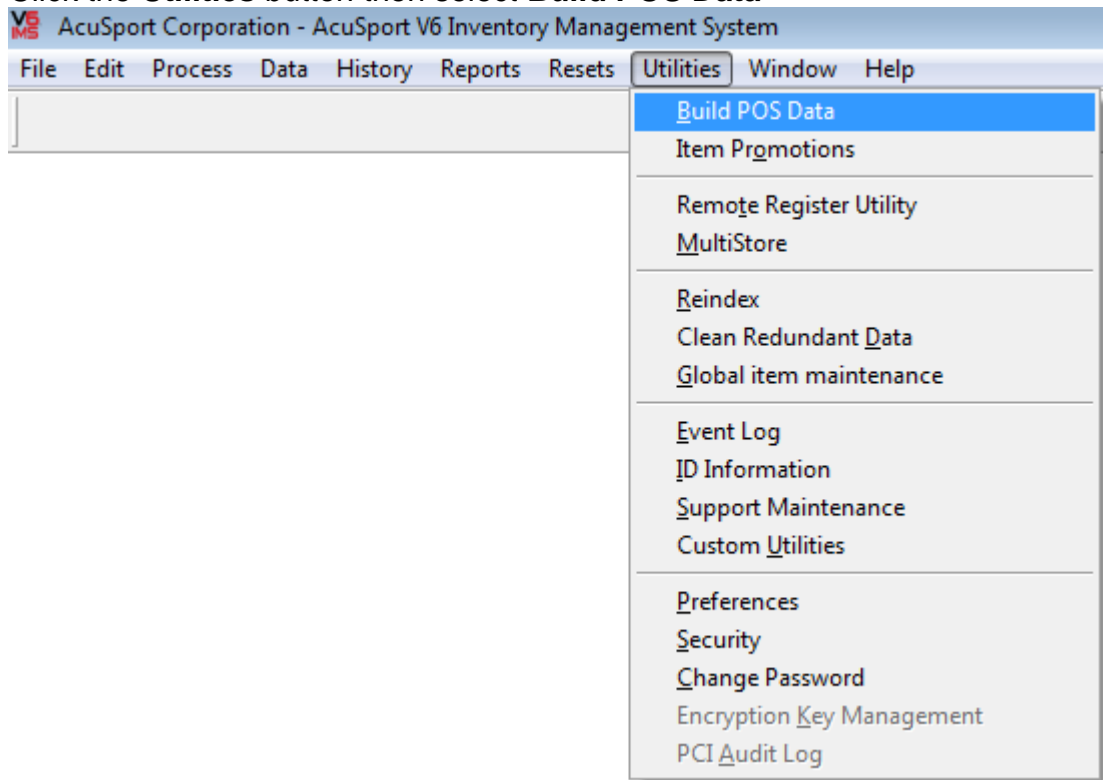
7. Log in to the **POS** application.

> ► 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:

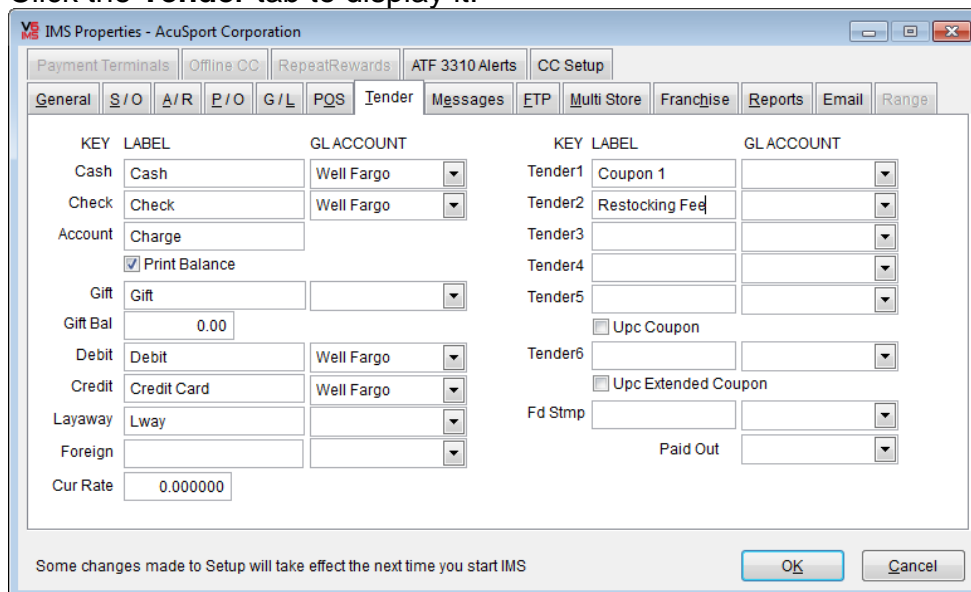   1. Click the **Cost/Price** tab to display it.

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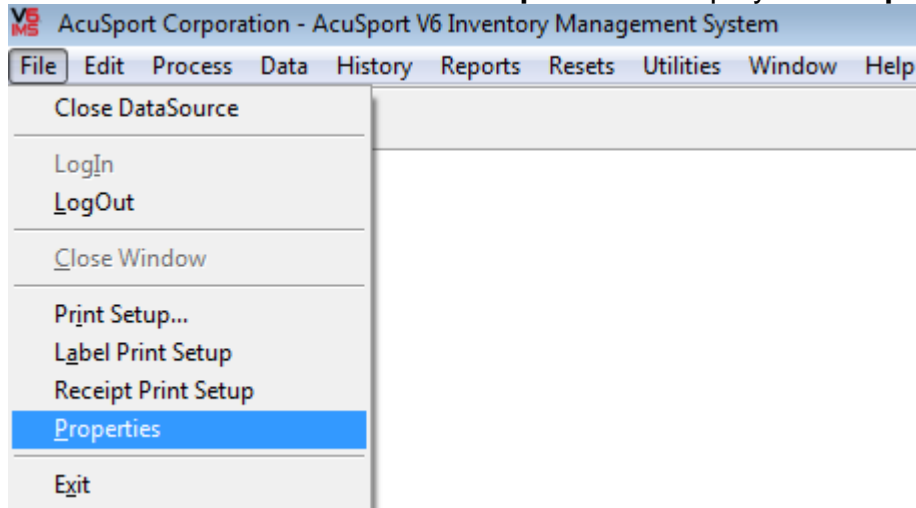
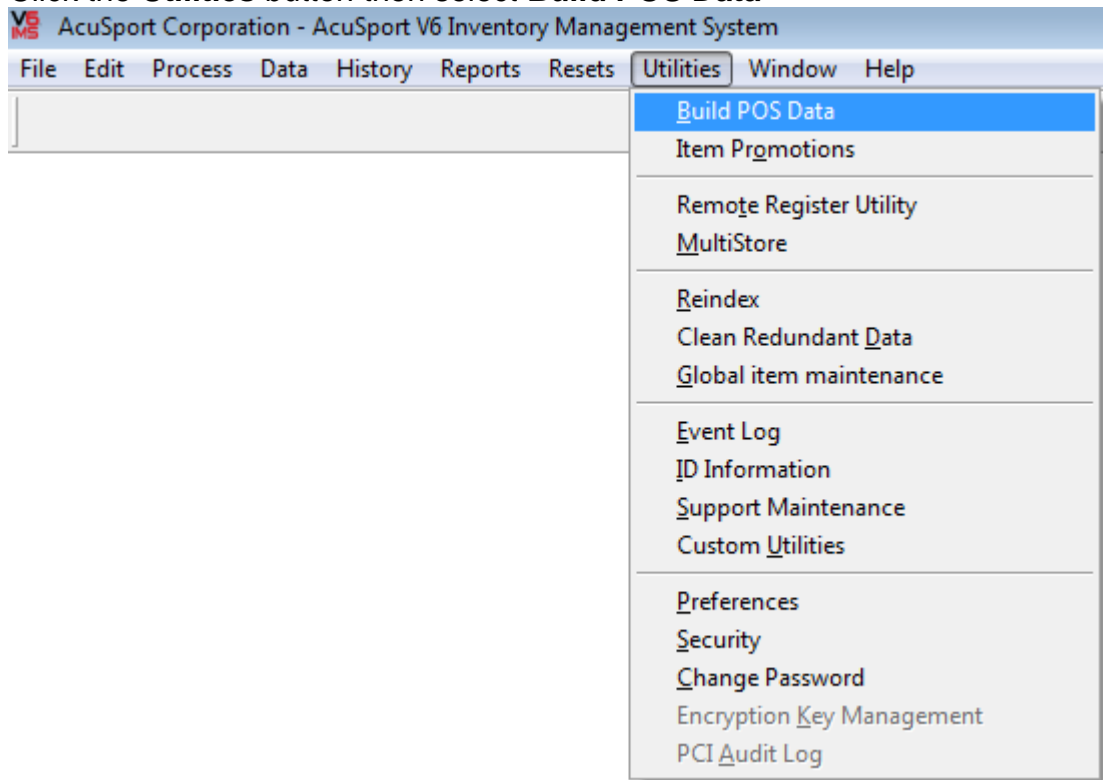
3. Click the **Tender** tab to display it.

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**

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File   Edit   Process   Data   History   Reports   Resets | Utilities | Window   Help

Build POS Data

Item Promotions

Remote Register Utility
MultiStore

Reindex
Clean Redundant Data
Global item maintenance

Event Log
ID Information
Support Maintenance
Custom Utilities

Preferences
Security
Change Password
Encryption Key Management
PCI Audit Log

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.

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

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.

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.
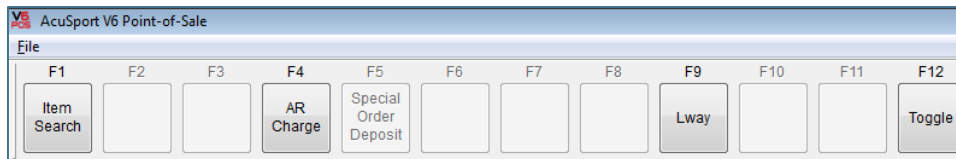
4. Click the **Lway (F9)** button to display the layaway number entry window.
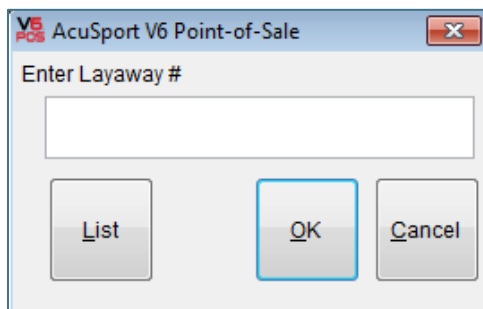
5. Enter the layaway number in the **Enter Layaway #** field (or click the **List** button and select the layaway from the list).

6. Click the **OK** button to display the **Layaway R/A** window.

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.

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.)

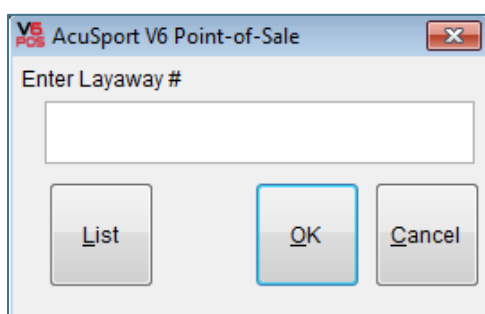2. If needed, click the **Point-of-Sale (F2)** button to display the set of buttons shown below.

   > ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.
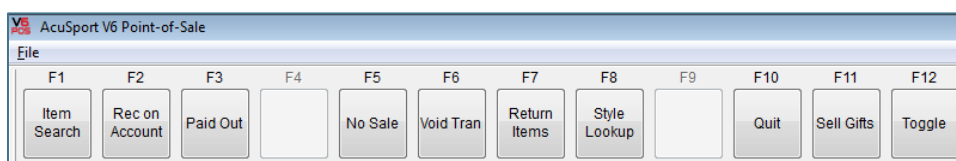
3. Click the **Toggle (F12)** button twice to display the recall buttons.
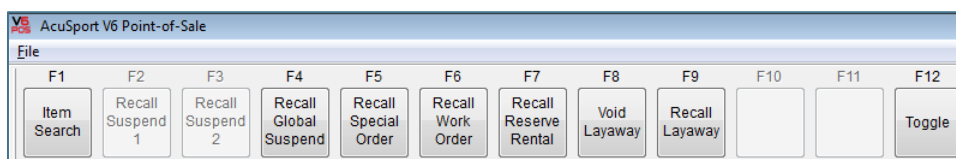
4. Click the **Recall Layaway (F9)** button to display the layaway number entry window.

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.

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.

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.

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.
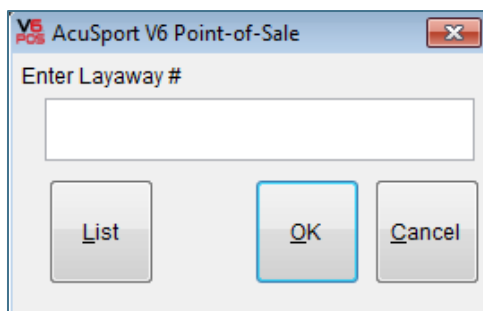
    ► If other windows (PIN entry, etc.) appear, complete or cancel them as appropriate.
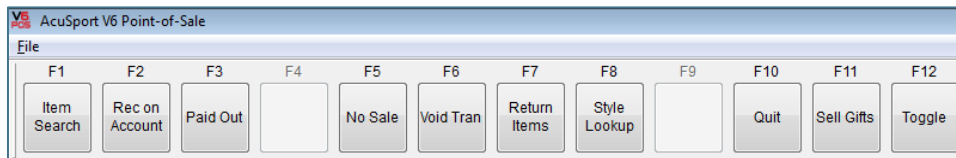
3. Click the **Toggle (F12)** button twice to display the recall buttons.
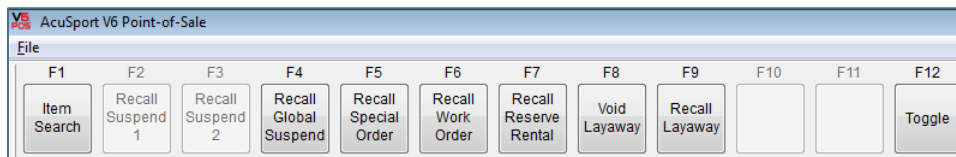
4. Click the **Void Layaway (F8)** button to display the layaway number entry window.

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.

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).
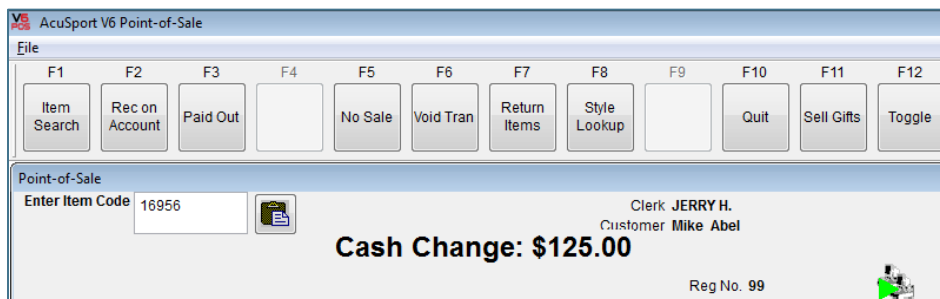
3. Issue a refund in the amount shown.

Refund the Deposit Minus a Restocking Fee (Item Code)

► Refer to Create a Restocking Fee Item Code for more information.
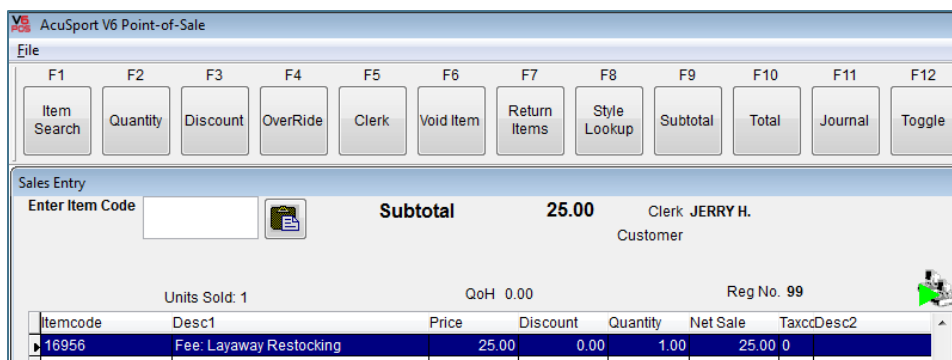
1. Click the **Cash (F2)** button to display the **Point-of-Sale** window.

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

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.

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

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

7. 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).

8. 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.

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

2. Enter the amount of the restocking fee in the **Enter Amount Tender** field.

3. 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.

4. 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).

5. Issue a refund in the amount shown.