

Setting Up and Using Layaway

"GETTING STARTED GUIDE"

<u>www.capretail.com</u>, <u>sales@capretail.com</u>, <u>support@capretail.com</u> Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time

- 1. Setup Layaway and Printers in Configuration.
- Please note A-F is optional, however, CAP highly suggests this to be setup and should be configured to the specific business needs.
 - A. Open CAP SellWise Pro.
 - B. Go to: Help \rightarrow Configuration \rightarrow Cash Drop/ Layaway/ Frequent Buyer.
 - C. Under the *LAYAWAY* section, apply a *Startup Fee*, *Cancellation Fee*, *Minimum Deposit %* or a *Minimum Deposit \$* as necessary for the business.
 - D. Set *Pull Inventory from Stock (Default Setting)* to **Yes** or **No**. If 'Yes' is selected, this function will take the inventory item and reserve it whereas applying 'No' will leave the item in stock available for other sales.
 - E. Add the layaway terms next to *Layaway Remarks*. For, example, "Down payment of 25% must be made in cash, but final payment can be one or any combination of these acceptable options: cash, check, credit." Please note, the remarks will print on the customer receipt. Once remarks have been added, press **Accept**.
 - F. Set *Show Layaway History* to Yes if maintaining a record in the Names database is required.

LAYAWAY	
Startup Fee	15.00
Cancellation Fee	20.00
Minimum Deposit %	25%
Minimum Deposit \$	0.00
Pull Inventory from Stock (Default Setting)	Yes
Layaway Remarks	Down payment of 25% must be made in cash, but final payment can be one or any combination of the acceptable payment options: cash, ch
Show Layaway History	Yes

- G. Once Layaway fields are set, press Accept and then select Esc Cancel from the Layaway Options page.
- H. From the main Configuration page, select **Printers**.
- I. Set the appropriate printer next to *Layaway Receipt* and press Accept.

Cash Sales Receipt	Brother HL-4070CDW series On SHIPPING1		
Charge Sales Receipt	Brother HL-4070CDW series On SHIPPING1		
Payment Received On Account Receipt	Brother HL-4070CDW series On SHIPPING1		
Second Copy of Receipt	NotAssigned		
Third Copy of Receipt	NotAssigned		
EDC Copy of Receipt	Brother HL-4070CDW series On SHIPPING1		
Layaway Receipt	Brother HL-4070CDW series On SHIPPING1		
Quotes and Packing Lists	Brother HL-4070CDW series On SHIPPING1		
Work Order	Brother HL-4070CDW series On SHIPPING1		
Lists (Names, Inventory, Vendors)	Brother HL-4070CDW series On SHIPPING1		
Reports (WinReports)	Brother HL-4070CDW series On SHIPPING1		
Purchase Orders and Receiving Reports (Buywise)	Brother HL-4070CDW series On SHIPPING1		
Graphs (WinReports)	Brother HL-4070CDW series On SHIPPING1		
Tags and Labels (TagWise)	Brother HL-4070CDW series On SHIPPING1		
History Lists (Names, Inventory, Vendors)	Brother HL-4070CDW series On SHIPPING1		
Customer Balance Reports (Names)	Brother HL-4070CDW series On SHIPPING1		
Event Ticket Printer	Brother HL-4070CDW series On SHIPPING1		
Pick List Printer	Brother HL-4070CDW series On SHIPPING1		
Packing List Printer	Brother HL-4070CDW series On SHIPPING1		
Switch Printer at Tender Screen to	Show List		

J. Select Esc Cancel from the Printers Assignments page and then Exit Configuration Settings. <u>www.capretail.com</u>, <u>sales@capretail.com</u>, <u>support@capretail.com</u> Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time

2. Create a Layaway at the POS.

- A. Open CAP POS.
- B. Select Name and attach the customer's name to the sale that will become a Layaway.
- C. Scan/select the item/items to be applied towards the Layaway.
- D. Select **Operations** and press **Layaway**.
- E. After selecting Layaway, SellWise will automatically calculate any fees, taxes and show the *Minimum Payment Required* based on the information previously setup in the Configuration settings.
 - *i.* Press **Payment** to change the payment amount the customer is applying if necessary. After entering the proper payment amount, select **Accept**.
 - *ii.* Press **Reference** to change the name the Layaway will suspend as, if desired. Once the proper reference name/number is entered, select **Accept**.
 - *iii.* Press **Pull Layaway Yes/No** to toggle to the option necessary for the business. If 'Yes' is selected, this function will take the inventory item and reserve it whereas applying 'No' will leave the item in stock available for other sales.
 - *iv.* Press **Cancel** to cancel the Layaway sale. If Cancel is pressed, all information applied to the current sale will be lost.
- F. Select **Tender** and choose the proper tender type. Press **Accept** to complete the transaction. The Layaway will then suspend in the POS.

	Qty = 1	Julia Sucł Julia	Julia's Jewels and Such Julia Gentry			2125 Total Sale			
Qty	Item ID	Description	Price	Total 🔺		15.00	Layaway Fee		
1	723	Diamond Ring Princess Cut	2000.00	2000.00		531.00	Deposit		
						546.00 Minimum Payment Required			
						546.00	PAYMENT AMO	DUNT	
						Gentry1206193	4 Reference		
						PullLayaway	Yes		
1 Item	(s)					<u>P</u> ayment	<u>R</u> eference	Tender	
-		Sub Total		2000.00		(i)	Pull Layaway	X	
Sales HELL	Pers Printer ON	Тах		125.00		Help	Yes/No	Cancel	
		Total		2125.00					
	www.capretail.com, sales@capretail.com, support@capretail.com								

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time

3. Make a Payment on an Existing Layaway.

- A. Open CAP POS.
- B. Select **Operations** and press **Layaway Payment**.
- C. Highlight/select the appropriate Layaway from the lookup list and press **Payment**.
- D. Enter in the payment amount and select Tender.
- E. Select the appropriate tender type and press **Accept**. Then, select **Accept** once more.
- F. If the Layaway has a remaining balance, SellWise will suspend the Layaway using the same reference name as before.
- G. This process will be repeated until the Layaway has been paid in full.

4. Make Changes to an Existing Layaway.

- A. Open CAP POS.
- B. Select **Operations** and press **Layaway Pullup**.
- C. Select the appropriate Layaway from the lookup list and press Change.
- D. The selected Layaway will open in the main screen of the POS.
- E. Make any necessary changes by adding and/or cancelling items from the sale.
- F. Once changes have been made, select **Operations**.
- G. Select Save Layaway. SellWise will suspend the Layaway using the same reference name as before.

5. Cancel a Layaway.

- A. Open **CAP POS**.
- B. Select **Operations** and press **Layaway Pullup**.
- C. Select the appropriate Layaway and press Cancel F8 Layaway.
- D. A message will appear asking "Are you sure you want to cancel this Layaway?" Press Yes.
- E. After selecting Yes, a message will appear *asking "Refund Balance to Customer?"* Press **Yes** or **No** depending on the option appropriate for the business.
- F. If 'Yes' is pressed, refund the amount owed and the Layaway will cancel from the POS.
 - i. If no refund is due, a message will appear advising "No refund due." Press **OK**.
 - ii. If a refund is due, a message will appear advising the amount of the refund. Press **Yes** to "Pay Out Cash."
- G. If 'No' was selected to Refund Balance to Customer, the Layaway will cancel from the POS and SellWise will not prompt to refund the customer.

6. Layaway Reports within the Names module.

- A. Open Cap SellWise Pro.
- B. Select the Names module and then double-click the desired customer name.
- C. Under the Sales and Pricing tab, select Layaway.
- D. A message will appear asking *"Include History of completed layaways?"* Select **Yes** or **No** depending on the option appropriate for the business.
 - *i.* The Layaway history shows statements of the <u>Quantity</u>, <u>Description</u>, <u>S/L</u>, <u>Price</u> and <u>Totals</u> of each payment made.
 - *ii.* The last statement will be labeled "Completed Layaway" once the item/items have been paid in full, if 'Yes' was selected to include history of completed layaways.
 - *iii.* Layaway <u>startup</u> and <u>cancellation fees</u> are not included in the Layaway statements as fees are not considered a part of the Layaway item. The fees <u>will</u> appear in the <u>Sales History</u> section.

www.capretail.com, sales@capretail.com, support@capretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time

7. View Sales History within the Names module.

- A. Open CAP SellWise Pro.
- B. Select the Names Module and then double-click the desired customer name.
- C. Under the Sales and Pricing tab, select View Sales History.
 - *i.* View Sales History shows the <u>Date</u>, <u>Description</u>, <u>Quantity</u>, <u>Price</u>, <u>Total</u>, <u>Invoice</u>, <u>S/L</u>, <u>Item ID</u> and <u>Sub-Descriptions</u> including any <u>startup</u> and/or <u>cancellation</u> fees applied towards a Layaway.

8. Layaway within the Reports module.

- A. Open CAP SellWise Pro.
- B. Select the **Reports** module and within the *Customer* section, select **Layaway**.
- C. Choose **Select AR Code Range** or **Select Last Name Range** depending on what is appropriate for the business. If necessary, enter in the specific AR Code Range or Last Name Range necessary for the report.
- D. Choose Include Tax in Totals and/or Show Layaway Details depending on what is appropriate for the business and press Accept.
 - i. The Layaway report gives a history and summary of all Layaways, open and closed to include each customer's Reference number, Date the Layaway was created, Quantity, Descriptions, S/L's, Totals, Dates Layaway payments were made, Invoice numbers and Layaway Balances.