



Setting Up and Using Layaway

“GETTING STARTED GUIDE”

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** → **Configuration** → **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, cr
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	Not Assigned
Third Copy of Receipt	Not Assigned
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.

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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 Quantity, Description, S/L, Price and Totals 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 startup and cancellation fees are not included in the Layaway statements as fees are not considered a part of the Layaway item. The fees will appear in the Sales History section.

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 Date, Description, Quantity, Price, Total, Invoice, S/L, Item ID and Sub-Descriptions including any startup and/or cancellation 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.*