

# CyberBOS 2004 Lay-A-Way Procedure

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

CyberBOS 2002 Node Version 3.2.231 11/19/2004 10:39:36 AM Windows Default Printer Enable

Tools Support

Clerk: **Bruce** Tax Code: Status: Terms:

Sold To: Cash Sale Ship To:

EDIT EDIT

Item	Description	Qty Ord	UDM	Unit Price	Extended	OH	Disc %
1							

Tender Method:  
Cash  
Check  
Credit Card  
On Acct  
Deposit

F1 Done  
Paid Out  
New Memo  
Open Drawer  
Non-Stock

Cancel Transaction  
Main Menu  
Ship Via

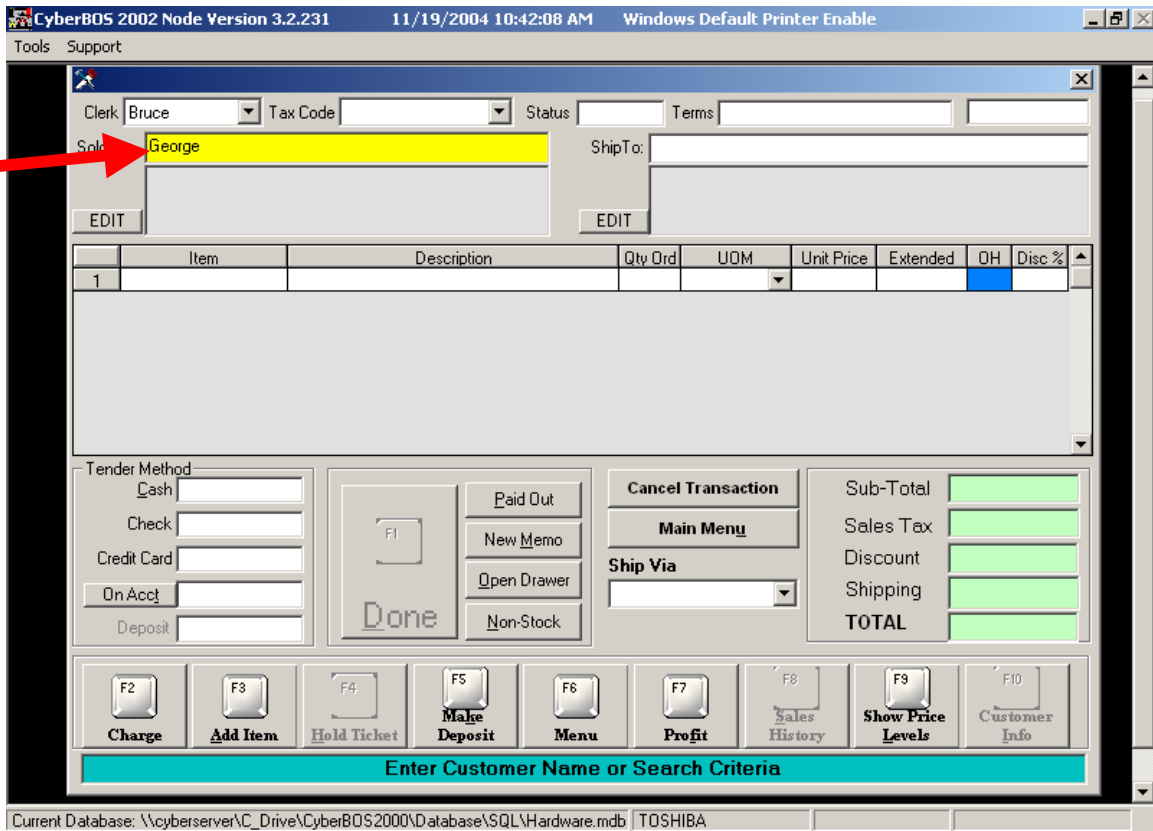
Sub-Total  
Sales Tax  
Discount  
Shipping  
TOTAL

F2 Charge F3 Add Item F4 Hold Ticket F5 Make Deposit F6 Menu F7 Profit F8 Sales History F9 Show Price Levels F10 Customer Info

Select your clerk name from the list and hit the <Enter> key.

Current Database: \\cyberserver\c\_drive\CyberBOS2000\Database\SQL\Hardware.mdb TOSHIBA

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

Address 1

Address 2

City

State  Zip

Phone(Home)

Phone(Work)

Status  Shipping

Tax  Price Level

Enter the customers address information.

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

George Bush

Search

Acc Num	Name	Street Address	City	Phone	Has Subs
1380	George Bush	1600 Pennsylvania	Washington DC	800-555-1212	<input type="checkbox"/>

Select Add Customer  Include Disabled Accounts Cancel

The new customer will automatically be selected. Press Enter.

CyberBOS 2002 Node Version 3.2.231 11/19/2004 10:57:55 AM Windows Default Printer Enable

Tools Support

**Account 1380**

Clerk: Doug Tax Code: Taxable Sales Status: Cash Only Terms: Retail

Sold To: George Bush 1600 Pennsylvania Ave Washington DC, DC 10006

Ship To: George Bush 1600 Pennsylvania Ave Washington DC, DC 10006

	Item	Description	Qty Ord	UOM	Unit Price	Extended	OH	Disc %
1	340353	19HP 46" Lawn Tractor	1	Each	1699.0000	1699.0000	0	
2								

Tender Method: Cash 0.00, Check 0.00, Credit Card 0.00, On Acct 0.00, Deposit 0.00

Buttons: Done, Paid Out, New Memo, Open Drawer, Non-Stock, Cancel Transaction, Main Menu, Ship Via: Customer Pickup

Summary: Sub-Total 1699.00, Sales Tax 114.26, Discount 0.00, Shipping, TOTAL 1813.26

Function Keys: F2 Charge, F3 Add Item, F4 Hold Ticket, F5 Make Deposit, F6 Menu, F7 Profit, F8 Sales History, F9 Show Price Levels, F10 Customer Info

Current Database: Y:\CyberBOS 2000 Customers\Ash Grove\20040430Cyberbos.mdb TOSHIBA BETA: LWY 1430

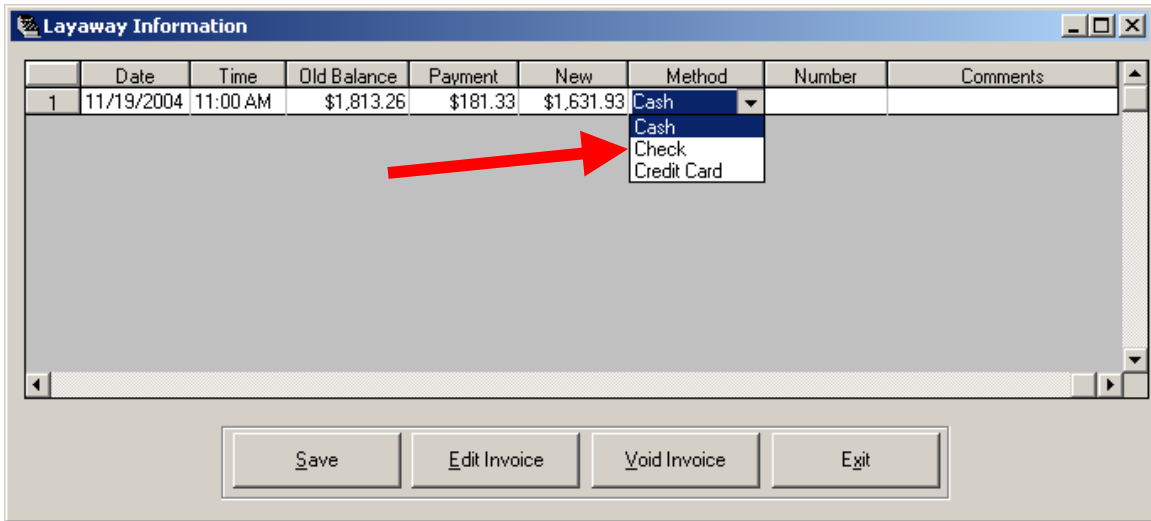
Enter Item(s) that you want to put on layaway.  
 Press enter on the last blank line and answer "Yes" you are finished.  
 Press F5

**Layaway Information**

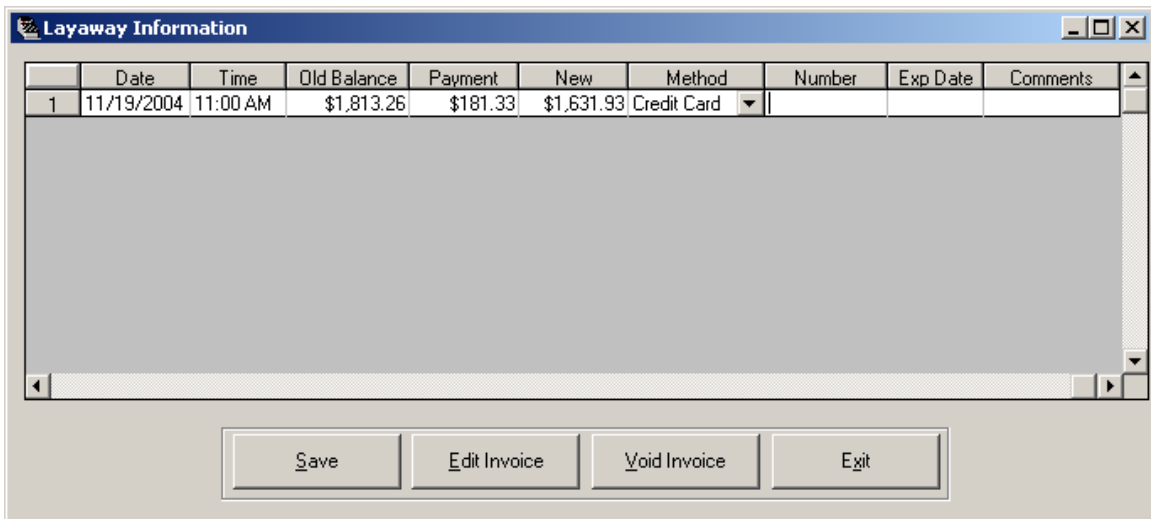
	Date	Time	Old Balance	Payment	New	Method	Number	Comments
1	11/19/2004	11:00 AM	\$1,813.26	181.33	\$1,813.26	Cash		

Buttons: Save, Edit Invoice, Void Invoice, Exit

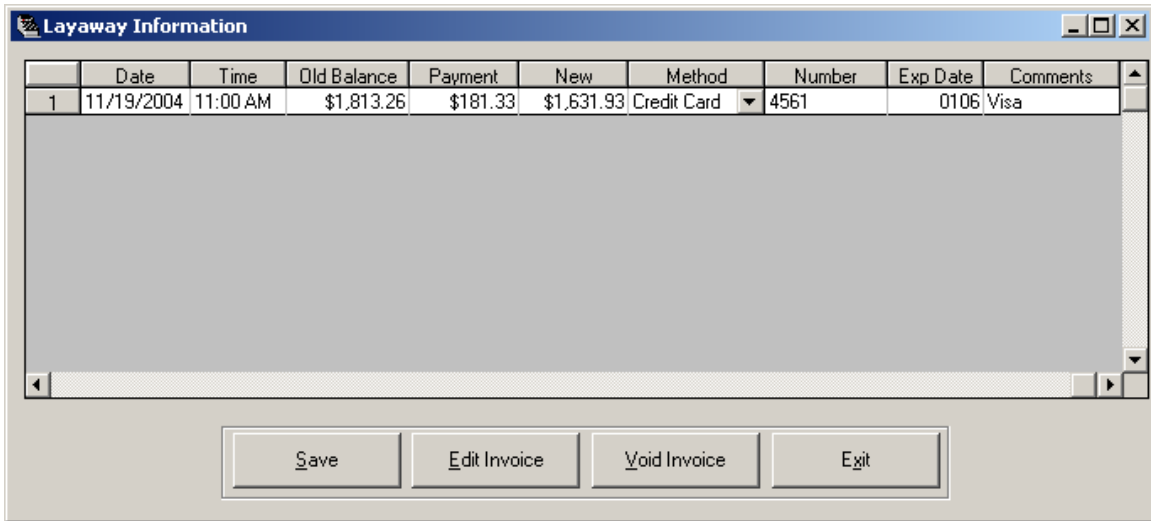
The amount of deposit required on this company is 10%, so it automatically calculated that for you. You can enter any amount you desire equal to or greater than this amount. Press Enter.



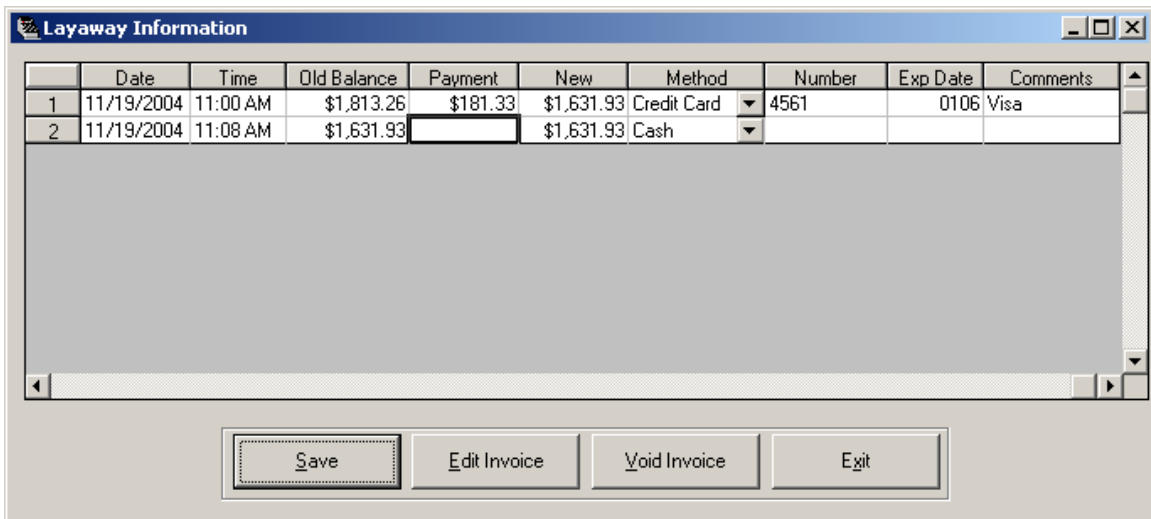
Select Tender Method



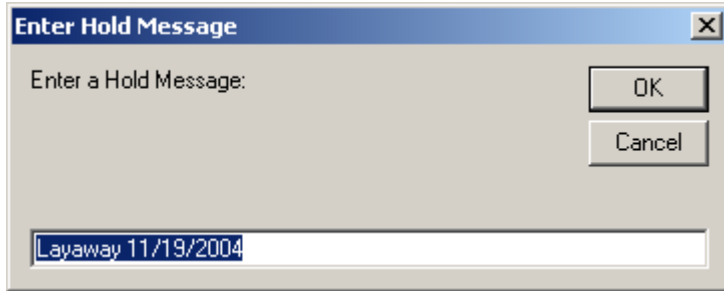
If Credit Card is chosen, it will prompt for Card Number (only enter the last 4 digits) then the Expiration date (example 0106 for Jan 2006) do not use dashes or slashes. You can choose to add a comment (optional).



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.

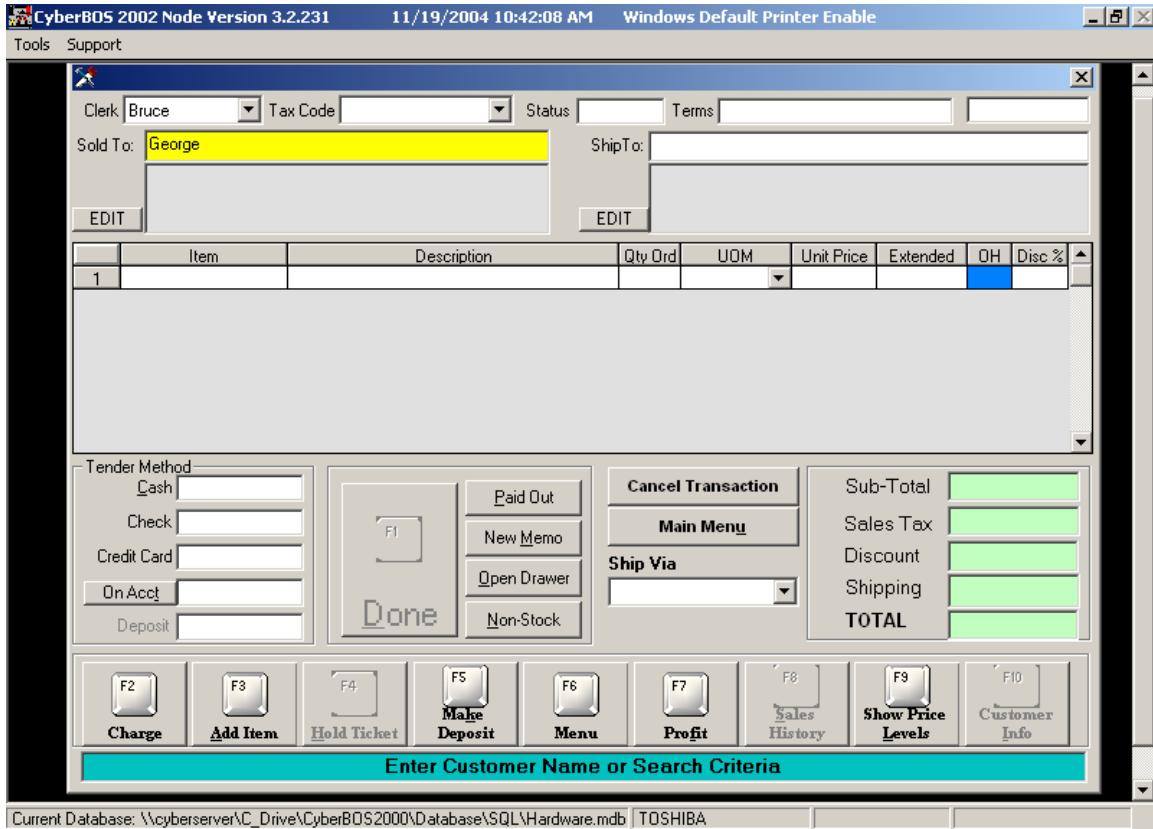


# Adding deposits to an existing Layaway Invoice

The screenshot shows the CyberBOS 2002 software interface. The title bar indicates the version is 3.2.231, the date is 11/19/2004 10:39:36 AM, and the printer is Windows Default Printer Enable. The interface includes a menu bar with 'Tools' and 'Support'. The main window contains a form for entering invoice details. At the top, there are fields for 'Clerk' (set to 'Bruce'), 'Tax Code', 'Status', and 'Terms'. Below these are 'Sold To' (set to 'Cash Sale') and 'Ship To' fields, each with an 'EDIT' button. A table with columns 'Item', 'Description', 'Qty Ord', 'UOM', 'Unit Price', 'Extended', 'OH', and 'Disc %' is visible, with a single row containing the number '1'. The bottom section of the interface features a 'Tender Method' section with input fields for 'Cash', 'Check', 'Credit Card', 'On Acct', and 'Deposit'. To the right of these are buttons for 'Paid Out', 'New Memo', 'Open Drawer', and 'Non-Stock'. Further right are buttons for 'Cancel Transaction', 'Main Menu', and a 'Ship Via' dropdown menu. On the far right, a summary section shows 'Sub-Total', 'Sales Tax', 'Discount', 'Shipping', and 'TOTAL' with corresponding green input fields. A row of function keys (F2-F10) is located at the bottom, with labels: 'Charge', 'Add Item', 'Hold Ticket', 'Make Deposit', 'Menu', 'Profit', 'Sales History', 'Show Price Levels', and 'Customer Info'. A blue banner at the bottom of the window reads: 'Select your clerk name from the list and hit the <Enter> key.' The status bar at the very bottom shows the current database path and the name 'TOSHIBA'.

Item	Description	Qty Ord	UOM	Unit Price	Extended	OH	Disc %
1							

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 Number, Name Or Phone Number)

George Search

Acc Num	Name	Street Address	City	Phone	Has Subs
1380	George Bush	1600 Pennsylvania	Washington DC	800-555-1212	<input type="checkbox"/>
1295	George Estes	3280 Wild Horse L	Foristell, MO 63348	(417) xxx-xxxx	<input type="checkbox"/>
430	George Looney			( ) 788-2705	<input type="checkbox"/>
842	George Spicer	The Case Works	Oldfield NO 65720	( ) 751-2111	<input checked="" type="checkbox"/>
1136	George Wilson	P. O. Box 117	Ash Grove, MO 65604	(417) 672-3890	<input type="checkbox"/>

Select Add Customer  Include Disabled Accounts Cancel

Select Customer from list, and press enter.

**Hold Ticket Selection**

Name:     Acc Num:     SubAccount:

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

Select Hold Ticket Or Hit 0 For New Ticket

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			

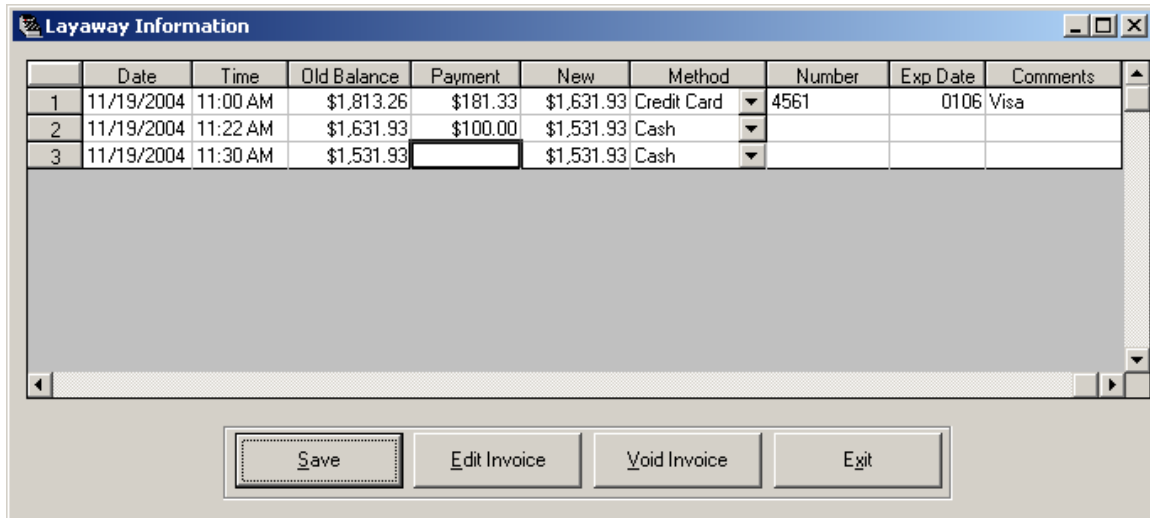
          

The system will automatically list the Layaway payments and allow you to add a payment.

**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.



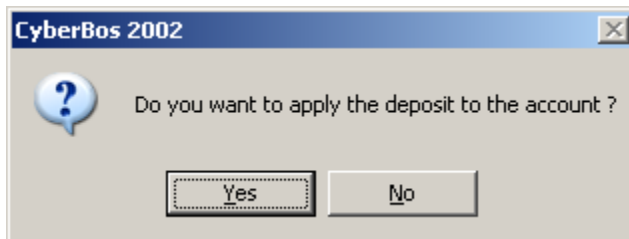
The screenshot shows a window titled "Layaway Information" with a table of payment records and a control panel at the bottom. The table has columns for Date, Time, Old Balance, Payment, New, Method, Number, Exp Date, and Comments. The data is as follows:

	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			

At the bottom of the window, there are four buttons: Save, Edit Invoice, Void Invoice, and 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.



The screenshot shows a dialog box titled "CyberBos 2002" with a question mark icon. The text inside the dialog box asks: "Do you want to apply the deposit to the account?". There are two buttons at the bottom: "Yes" and "No".

Answer Yes

It will then print the final Invoice..