Using Customer Order's Layaway feature

Overview:

Layaways are a type of transaction where the merchandise remains in the store while the customer pays for it over a period of time. This is differs from an Account Sale where typically the customer will take the merchandise at the time of sale.

Visual Anthology supports layaway transactions in the Customer Order module. Because this is a special type of Customer Order transaction other features of this screen will not be available if the Layaway option is checked. Pro-Forma and Allow BO are not available.

Setting up for Layaways

The Layaways feature requires that you have a special DLL from Anthology. This DLL will be placed on your system to enable the Layaway feature in your Customer Order module.

Taking a layaway

- Open Customer Order
- F4 New
- Assign a customer
- On the Header tab choose the Layaway option below the allow BO checkbox.
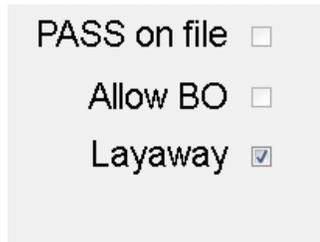
- **You should select the Layaway option now. If you add line items and then try to select it you will NOT be able to.**
- On the Details tab add your line items to the Customer Order as usual. Notice that the shipping and back order fields are not available to you when using Layaways.
- Once all the items have been added to the Customer Order
- Choose F3 Take Tenders
  - Select a tender type
  - Enter the amount of the deposit being taken if any
  - Click "Enter Line"
- Because the amount you entered did not satisfy the amount due Visual Anthology is expecting another tender. We are not taking another tender at this time so we must manually post the sale to Customer Order.
- Choose F10 Save
- Choose F11 Print – this will give you a receipt with the "deposit" shown.
- Now choose F12 Post - the message "Post Now" appears → choose YES.

- You're done.

Making a payment on the layaway

- Open Customer Order
- In the List view, locate the Customer Order by name or number
  - There may be more than one listed depending on how many payments have been made. Look at the status column to locate the "Open" Customer Order.
- Choose Details
- Choose F3 Take Tenders - the tender screen will show you the total amount already taken on this order (layaway) and the amount still due.

Amount

0.00	Enter line

Total Tendered	500.00
Total Due	2,000.00

  - Select a tender type
  - Enter the amount of the payment being taken
  - Click "Enter Line"
  - **If you want to print a receipt for the customer you must to it now. Printing later will not include the payments**.
    - Choose F10 Save
    - Choose F11 Print
    - Choose Invoice
- Once your invoice has been printed you are ready to post the order.
- Now choose F12 Post - the message "Post Now" appears → choose YES.
- You're done.

    You can keep track of the balance on the Details tab → Total Tendered and Total Due fields.

Completing the Customer Order (Layaway)

- Open the Customer Order
- Details → F3 Take Tender
- Enter the amount to complete the payment

Amount

1.95	Enter line

Total Tendered	17.00
Total Due	1.95

    Total due after three payments was 1.95 so I entered this amount

- Next choose Enter Line - because the amount you are taking satisfies the amount due you are asked if you want to Post
- Choose Yes
- And print your invoice that shows all the transactions it took to complete the sale.

DATE	CUST PO	TERMS		WEIGHT		SHIP VIA
4/4/2013		1% 10 NET 30				

	SKU1	Title / Description	Ord	UOM	Ship	B/O	Price	Disc	Ext.
Sale	0030646294	Biology : Visualizing Lif	1	EA	1	0	91.99		91.99

Sub-total	91.99
Shipping	0.00
Tax	0.00
TOTAL	91.99
Total Tendered	91.99
DEPOSIT	25.00
CHECK	27.00
CHECK	39.99
Total Due	0.00