PALADIN DATA CORPORATION™

BizCoach Webinars

The Layaway Renaissance

Traci Castillo
Paladin Trainer and Technician

PALADIN™
DATA CORPORATION

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The Layaway Renaissance

- How to setup the layaway feature
- How to create a layaway order
- How to receive a layaway payment
- How to complete a layaway transaction
- How to create a checkout message
- How to create the customer report for all layaway orders
- How to create the payment report for all layaway orders
- How to view a layaway status

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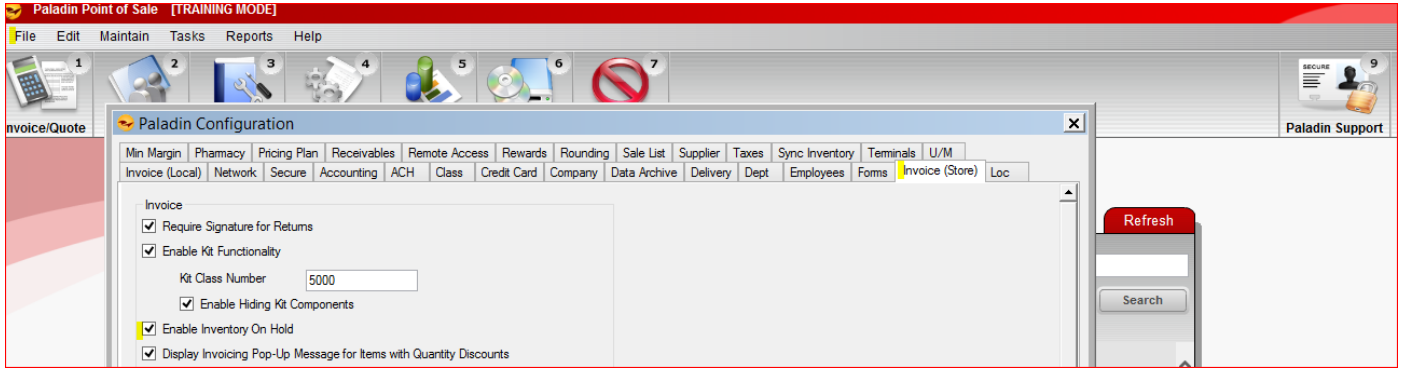
How to setup the layaway feature



1. Open Paladin Point of Sale.
2. On the **File** menu, click **Setup**.
3. Click the **Invoice (Store)** tab.
4. Select the **Enable Inventory On Hold** checkbox.
5. Scroll to the bottom of the window, click **Save**, and then click **Close**.

How to create a layaway order

1. Create a new customer layaway account:
   a. In the **Customers** module, click **Add** or press F2. In the **Name** box, enter a name that includes “layaway”**,** and then click **Add** or press F12. Example: **LAYAWAY – John Smith**
   b. On the **Customers** tab, in the **Form Control** section, click the **Create month-end Statement** checkbox to clear it, and then click **Save** or press F12.
2. In the **Invoice/Quote** module, in the **Customer** list, select the customer layaway account, or use **Advanced Lookup** to search for it.
3. Scan the layaway item, and then click **Add Note** or press F2 to enter the layaway’s expiration date.
4. On the bottom ribbon, click **Store Transaction** or press F6.
5. In the **Store Transaction** window, select **On Hold**.
6. In the **Name** box, enter a name for the layaway.
7. In the **Memo** box, enter the expiration date and/or due date for the next payment.
   Example; **Layaway – John Smith 4-2-13**
8. Click **Store** or press F12.

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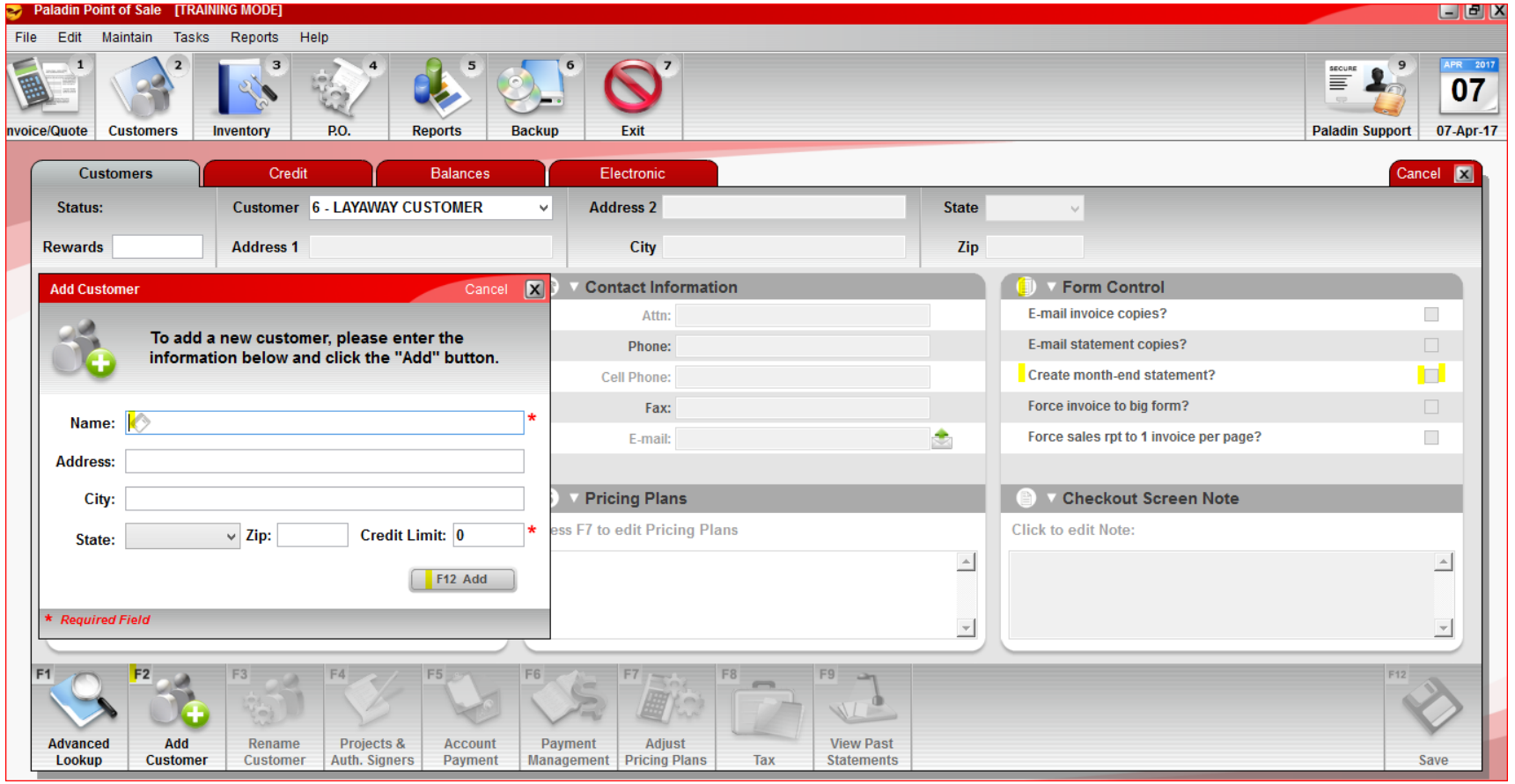
Create a layaway customer account



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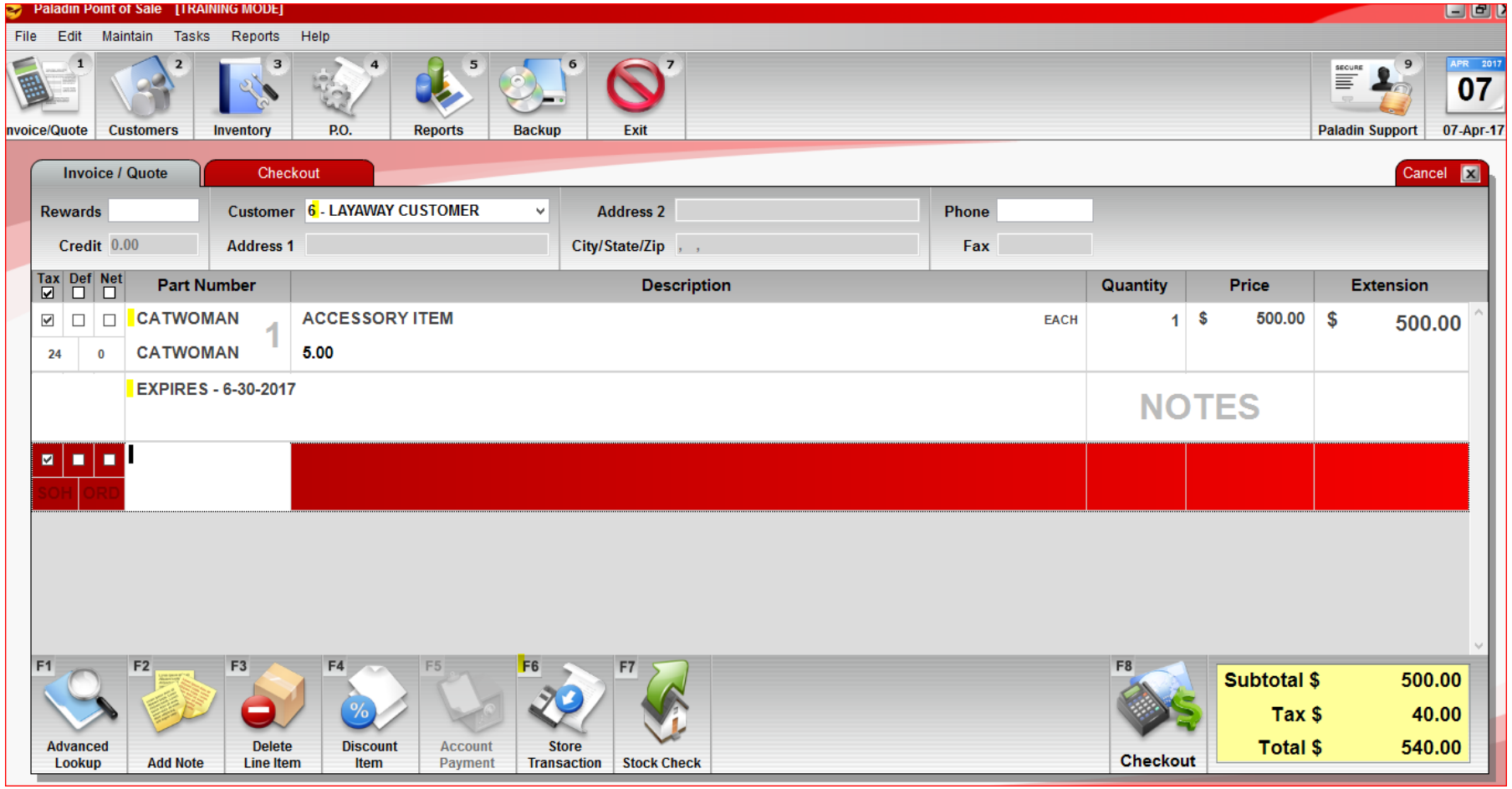
Create the layaway transaction



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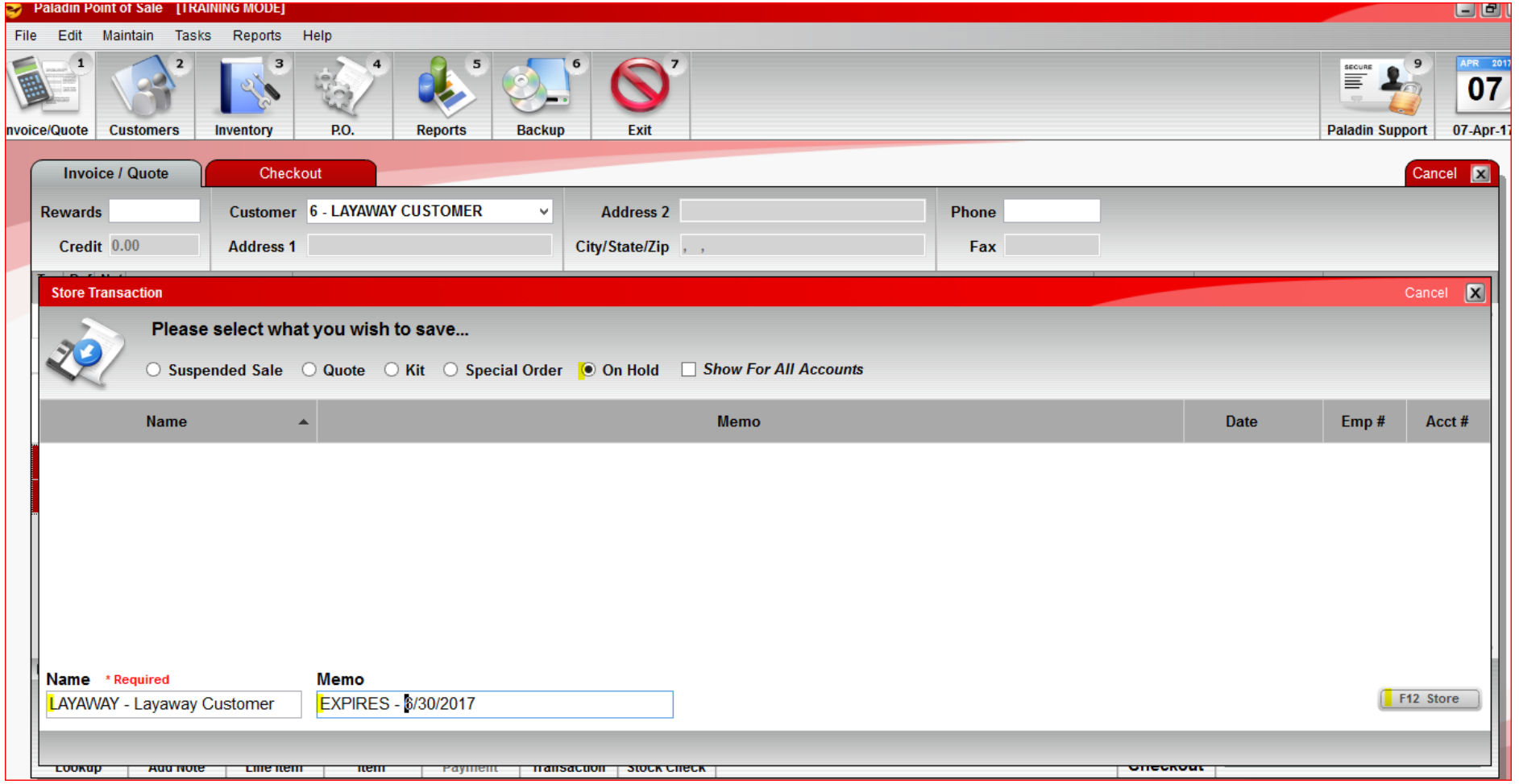
Store the layaway transaction



How to receive a layaway payment

1. In the I**nvoice/Quote** module, in the **Customer** list, select the customer layaway account, or use **Advanced Lookup** to search for it**.**
2. On the bottom ribbon, click **Account Payment** or press F5.
3. In the **Payment** box, enter the payment amount.
4. In the **Note** box, enter **layaway payment**.
5. Click **Checkout** or press F12 to process the payment.

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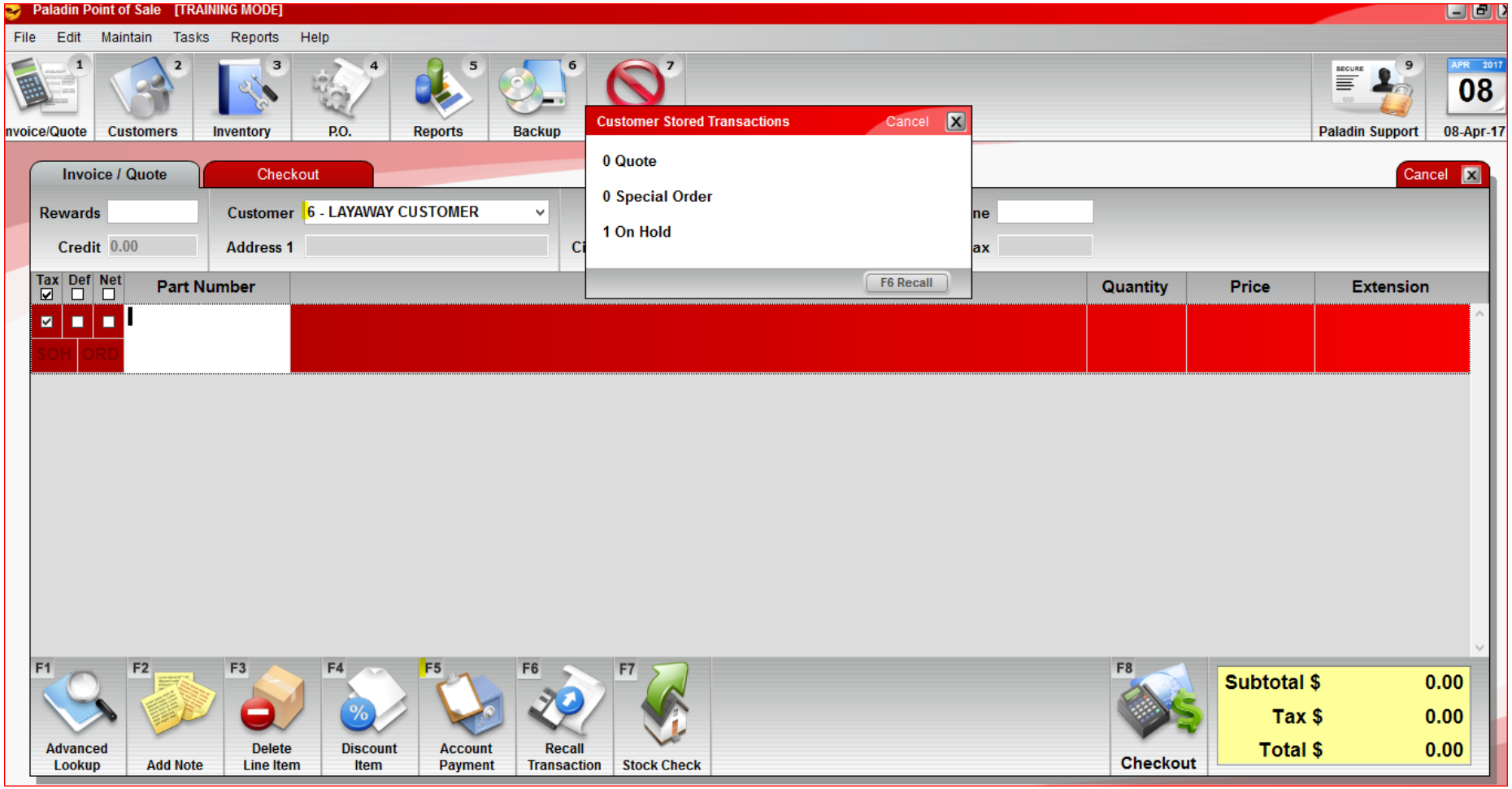
View the customer layaway account



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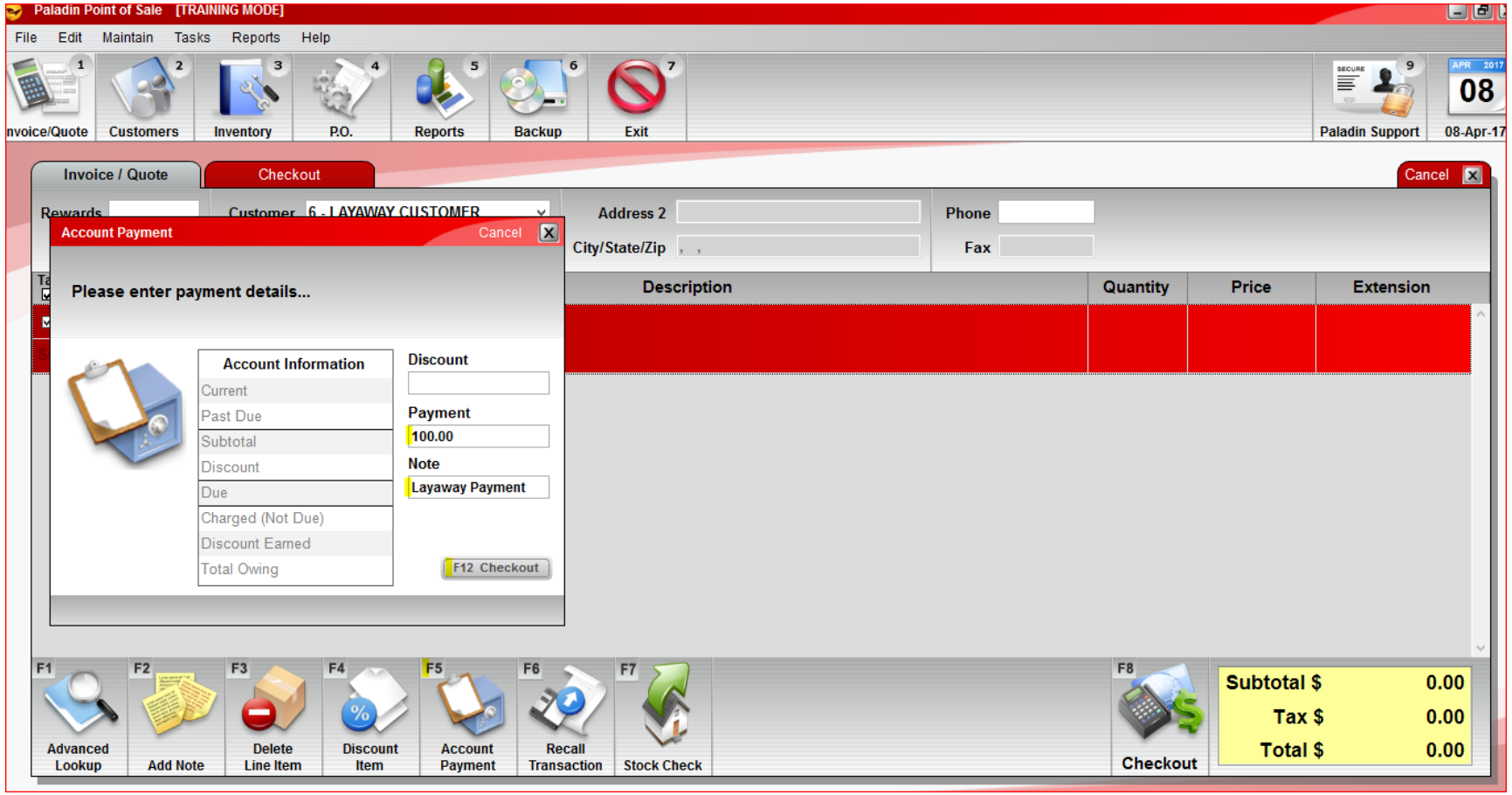
Receive a layaway payment



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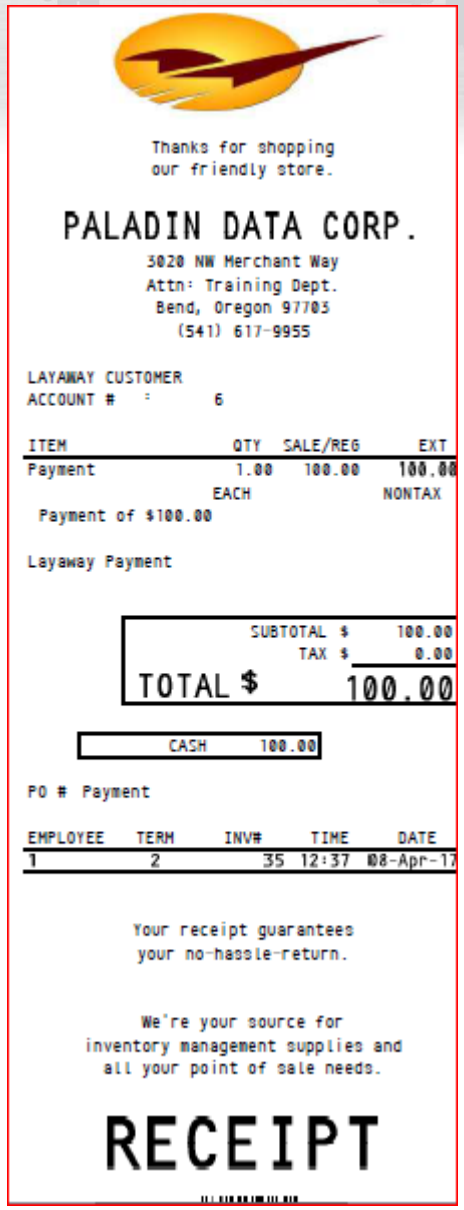
Layaway payment receipt



Thanks for shopping
our friendly store.

PALADIN DATA CORP.
3020 NW Merchant Way
Attn: Training Dept.
Bend, Oregon 97703
(541) 617-9955

LAYAWAY CUSTOMER
ACCOUNT # : 6

ITEM	QTY	SALE/REG	EXT
Payment	1.00	100.00	100.00
	EACH		NONTAX

Payment of $100.00

Layaway Payment

SUBTOTAL $	100.00
TAX $	0.00
TOTAL $	100.00

CASH 100.00

PO # Payment

EMPLOYEE	TERM	INV#	TIME	DATE
1	2	35	12:37	08-Apr-17

Your receipt guarantees
your no-hassle-return.

We're your source for
inventory management supplies and
all your point of sale needs.

RECEIPT

How to complete a layaway transaction

1. In the I**nvoice/Quote** module, in the **Customer** list, select the customer layaway account ,or search for it using **Advanced Lookup.**
2. On the bottom ribbon, click **Recall Transaction**.
3. In the **Recall Transaction** window, select **On Hold**.
4. Highlight the layaway invoice, and then click **F12 Recall**.
5. In the **Checkout** tab, on the bottom ribbon, click **Checkout** or press F8.
6. On the bottom ribbon, click **Charge** or press F2 to apply the customer's account balance.
7. Select additional payment methods, and then click **Checkout** or press F12 to complete the transaction.

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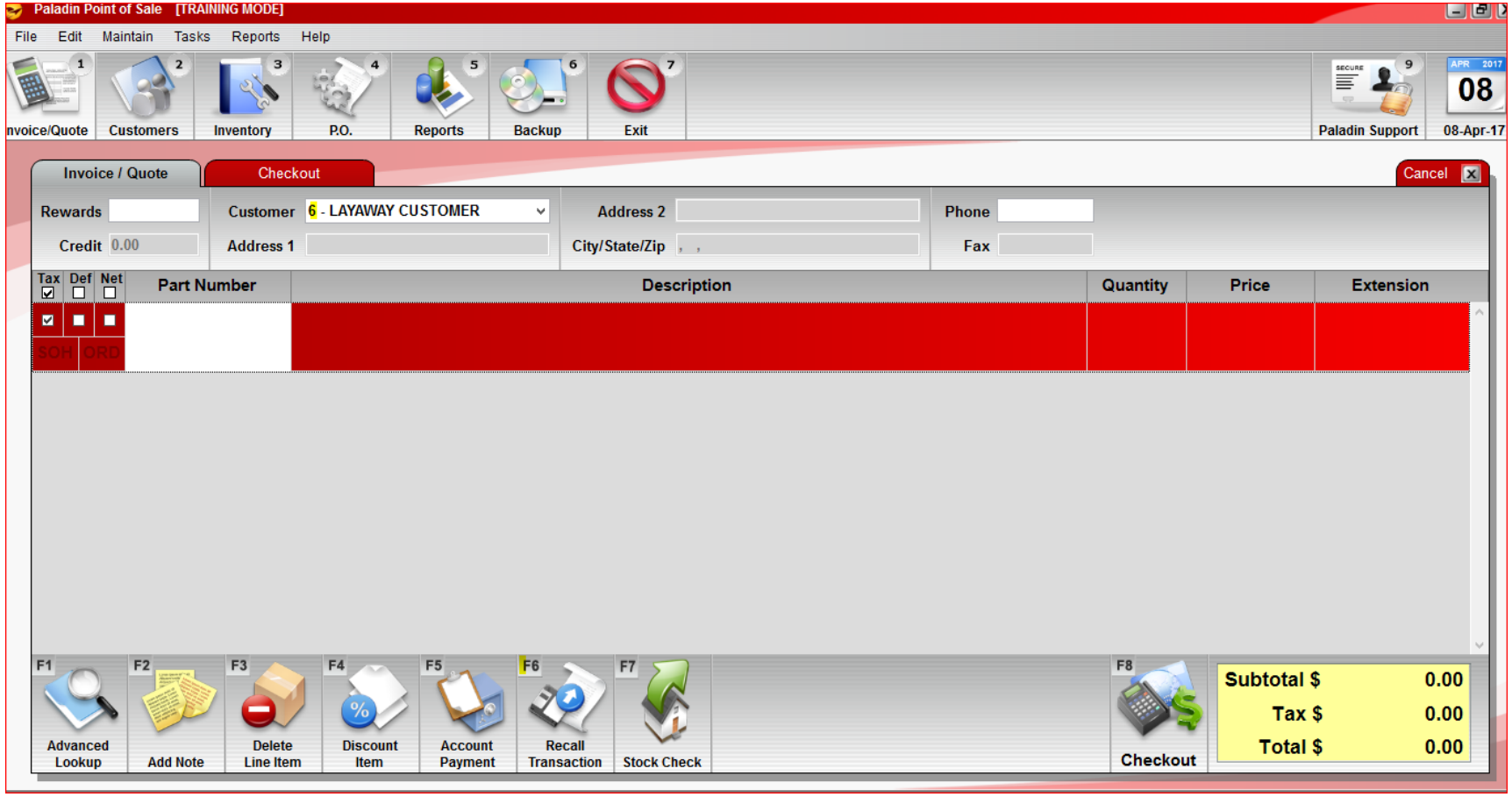
Select the layaway customer account



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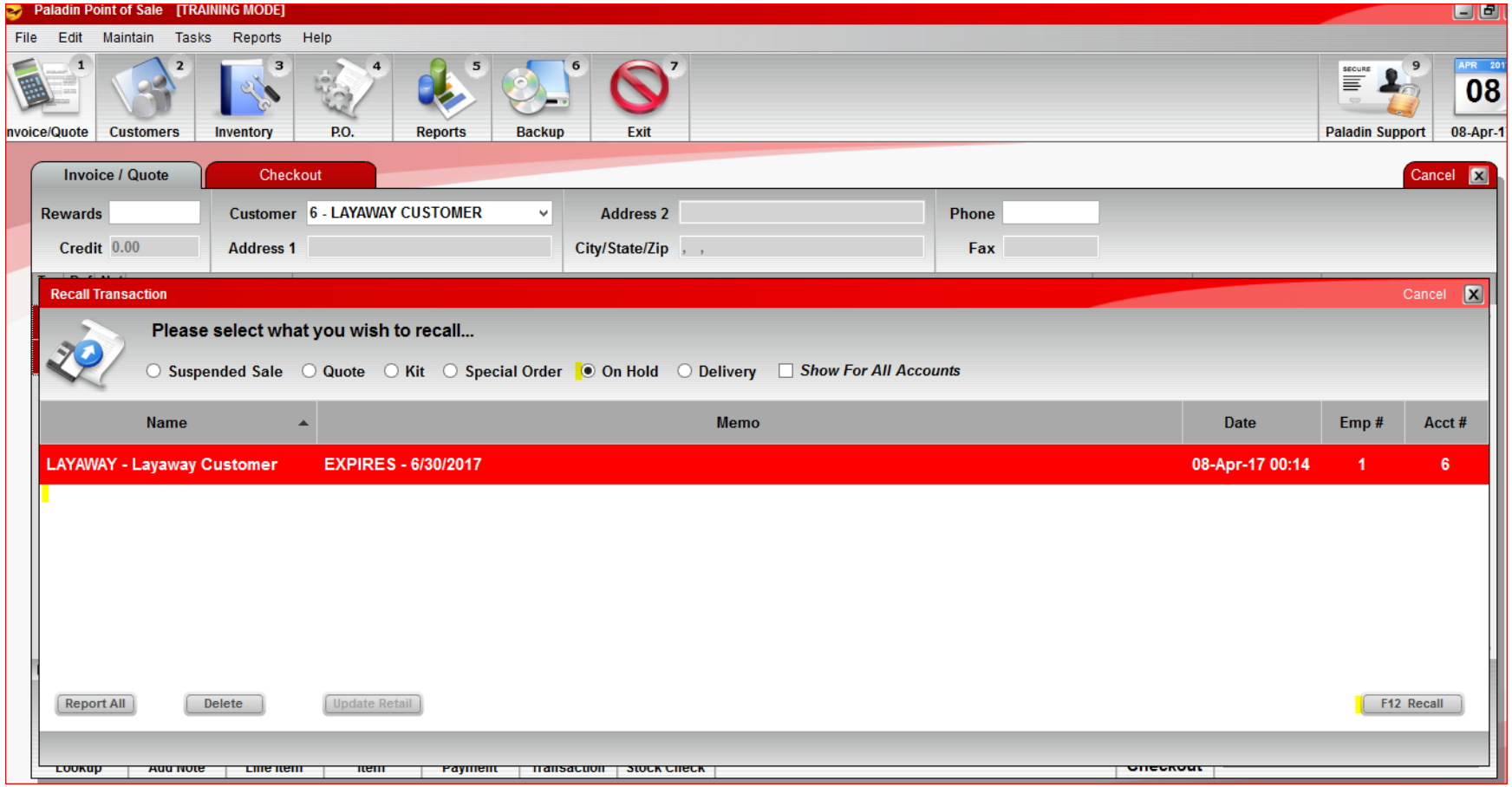
Lookup the layaway transaction



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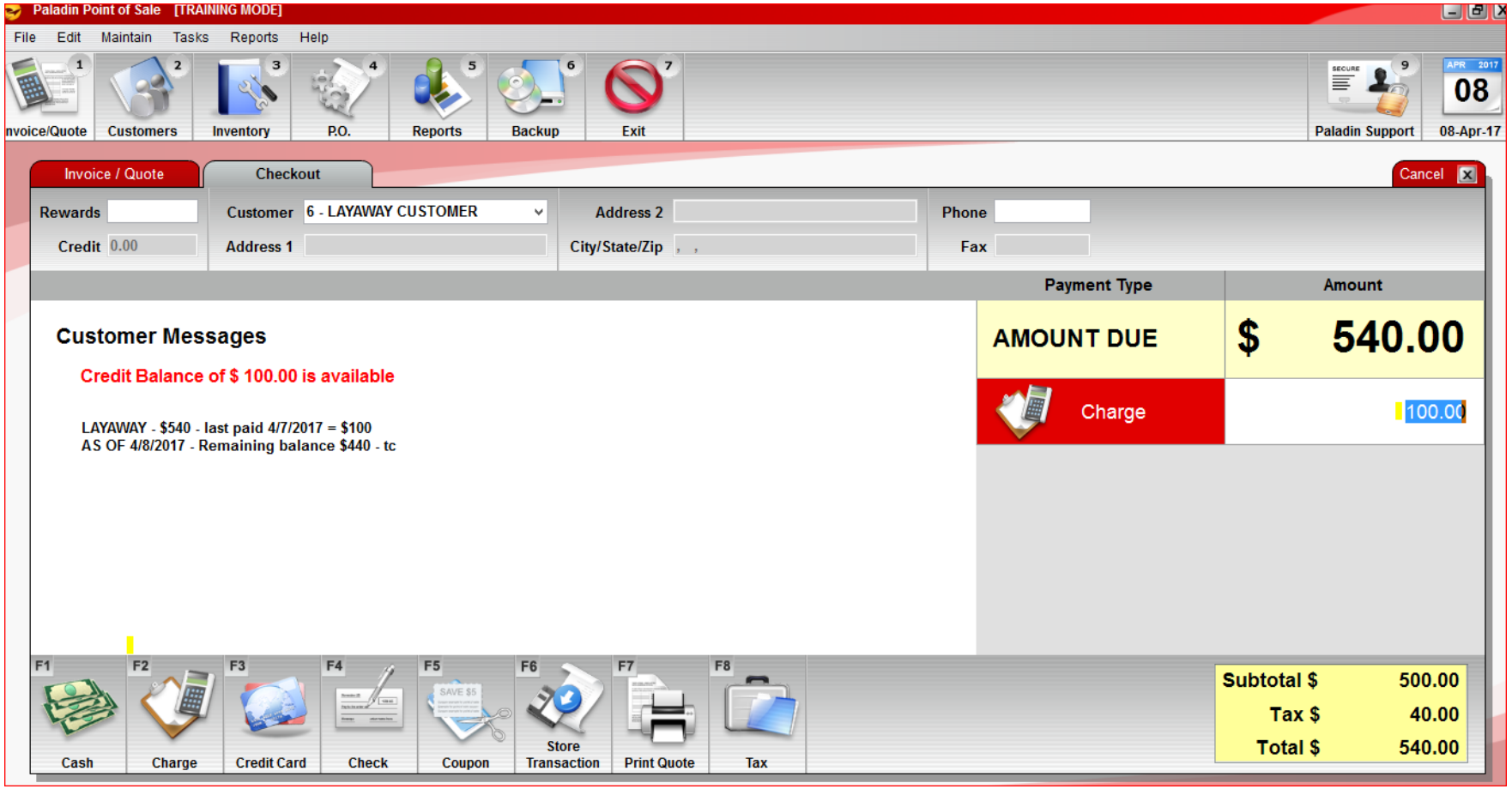
Apply the credit balance



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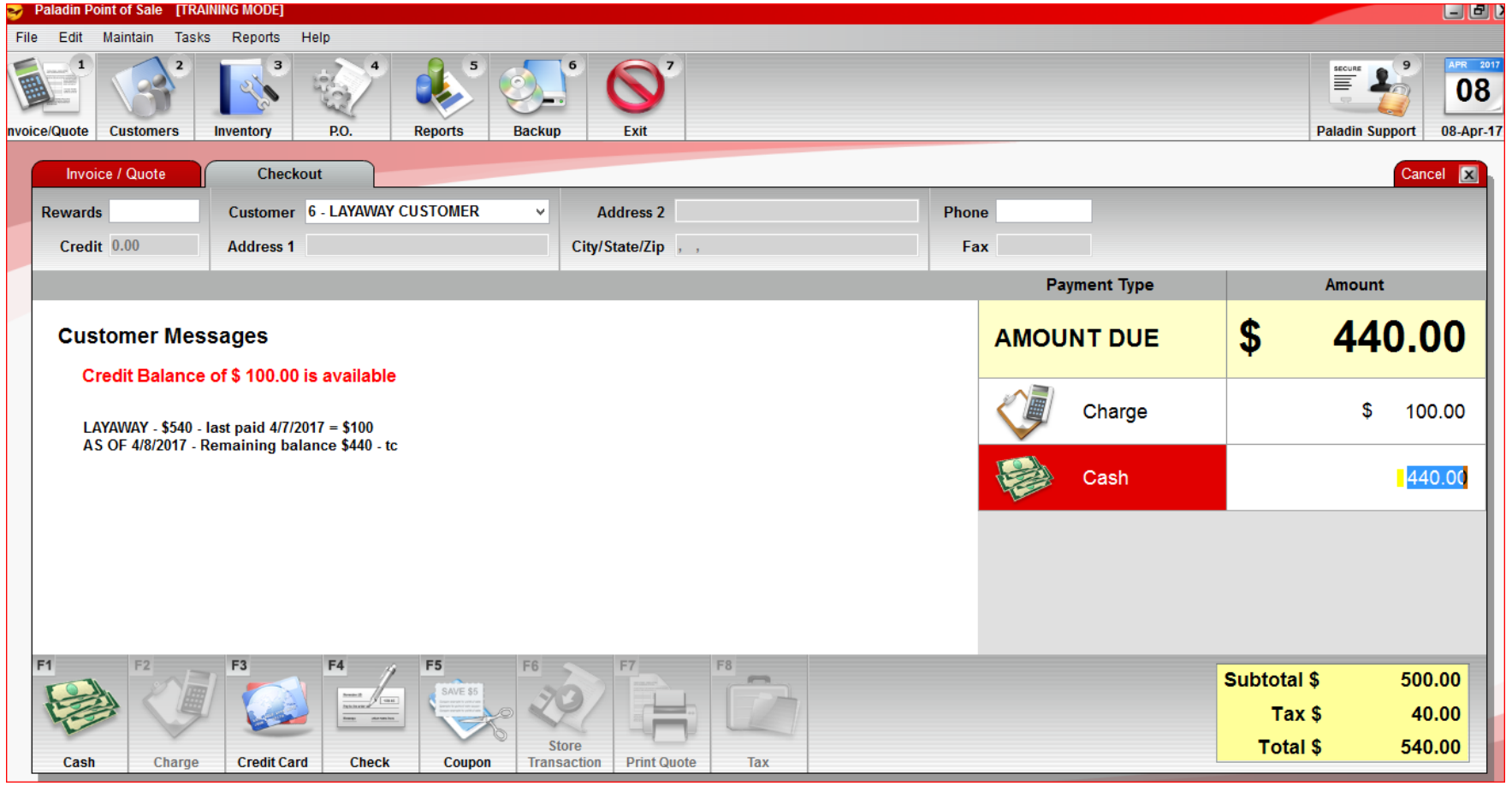
Complete the layaway transaction



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Completed layaway transaction receipt

Thanks for shopping
our friendly store.

PALADIN DATA CORP.
3020 NW Merchant Way
Attn: Training Dept.
Bend, Oregon 97703
(541) 617-9955

LAYAWAY CUSTOMER
ACCOUNT # : 6

ITEM	QTY	SALE/REG	EXT
CATWOMAN	1.00	500.00	500.00
	EACH		
ACCESSORY ITEM			

EXPIRES - 6-30-2017

SUBTOTAL $	500.00
TAX $	40.00
TOTAL $	540.00

CHARGE	100.00
CASH	440.00

PO # LAYAWAY COMPLETE

I AGREE TO PAY THE ABOVE TOTAL ACCORDING TO THE POSTED TERMS AND CONDITIONS

Manual Signature

SIGNATURE LAYAWAY CUSTOMER

EMPLOYEE	TERM	INV#	TIME	DATE
1	2	36	12:48	08-Apr-17

How to enter a checkout message

- In the **Customers** module, in the customer's account, in the **Checkout Screen Note** box, enter your message.
- In the **Invoice/Quote** module, when the layaway customer account is selected, This message appears during checkout,.
- Make sure you remove this message after the layaway transaction is completed.
- You can search for these notes in the **Transaction Report**.

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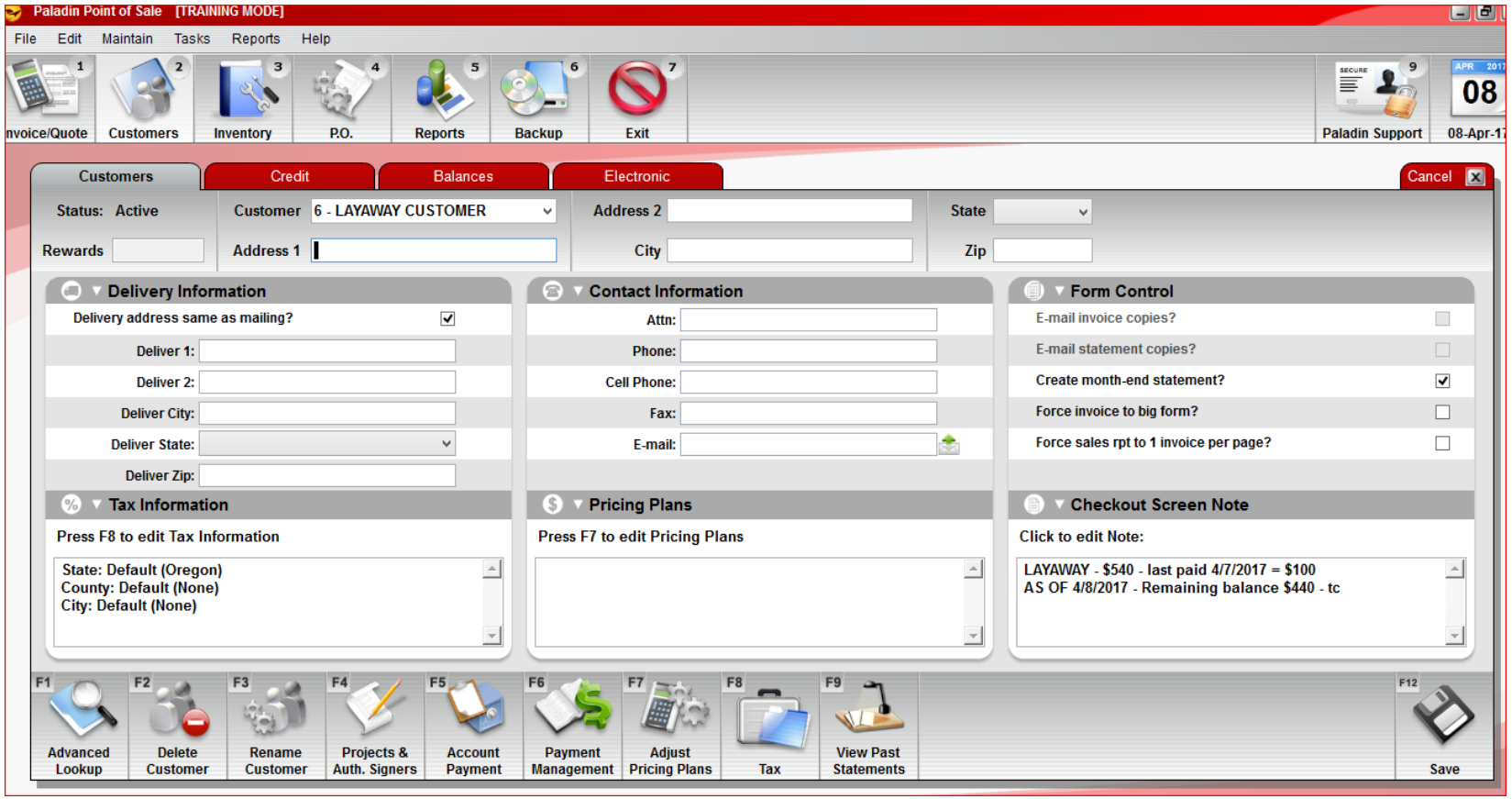
Enter a reminder message that will display at checkout



How to create a customer report for ALL layaway orders

1. On the top ribbon, click the **Invoice/Quote** module.
2. On the bottom ribbon, click **Recall Transaction** or press F6.
3. In the **Recall Transaction** window, select **On Hold**.
4. Select **Show for All Accounts**.
5. Click the **Name** column, and then sort by one of these options:
   - In the list, select **On Hold** to search for the stored layaway items in ascending or descending order.
   - In the list, select **Name** to search for all outstanding layaway orders.
6. Select the orders, and then click **Report All**.

Note: Microsoft Excel 2007 or later must be installed on the computer to run this report

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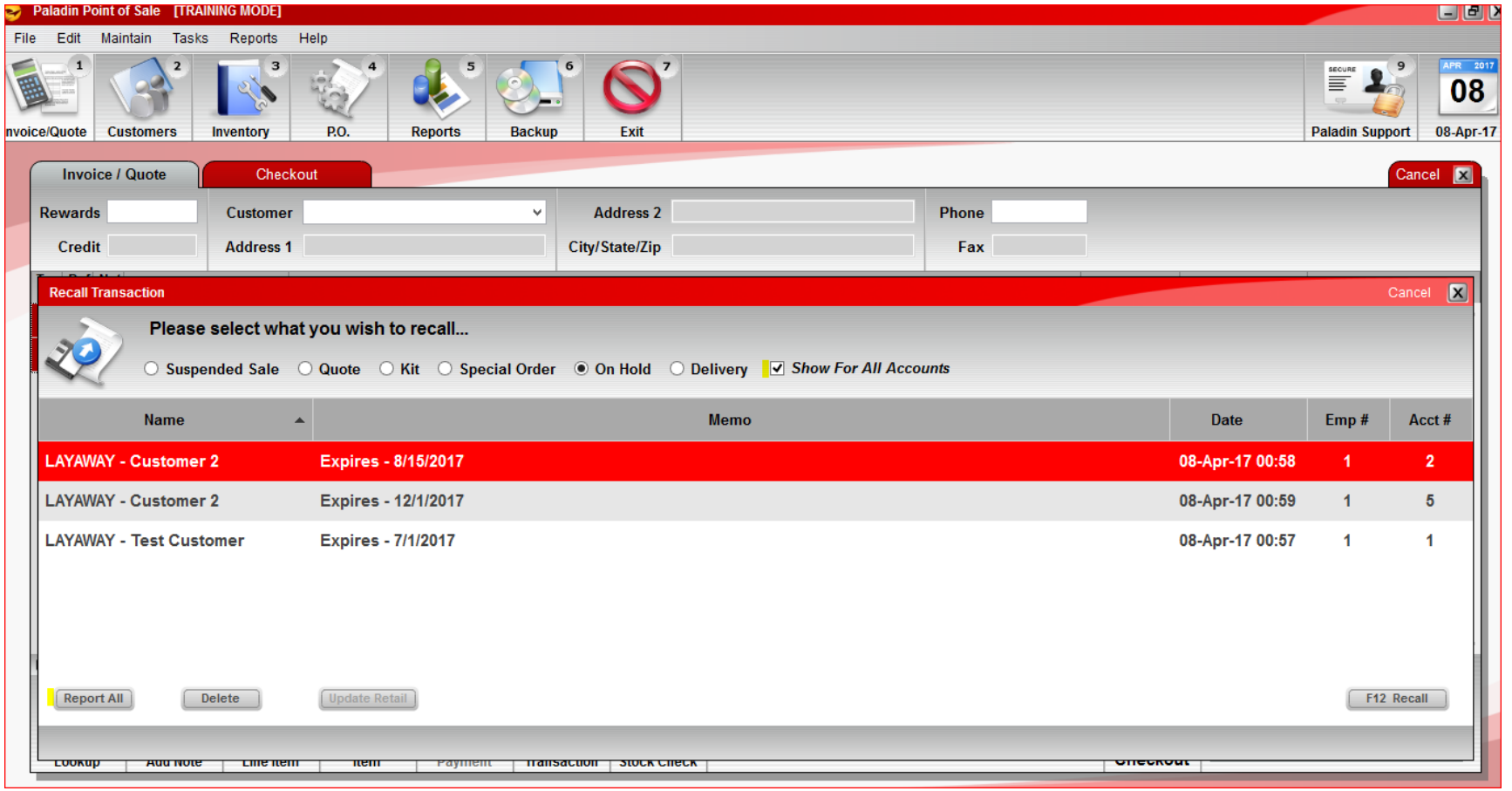
Create a customer report for ALL layaway orders



How to create the payment report for ALL layaway orders

1. In the **Reports** module, in the **Report Area** pane, click **Sales Analysis**, and then click **What I Need to Know**.
2. In the **Report List** pane, click **Transaction Report**, and then click **Next** or press F12.
3. In the **Additional Settings** pane, in the **Keyword Search** box, select **Note Field**.
4. In the dialog box next to **Note Field**, enter this term: **Layaway**
5. Click **Run Report** or press F12. The report will run and then appear as a PDF document.

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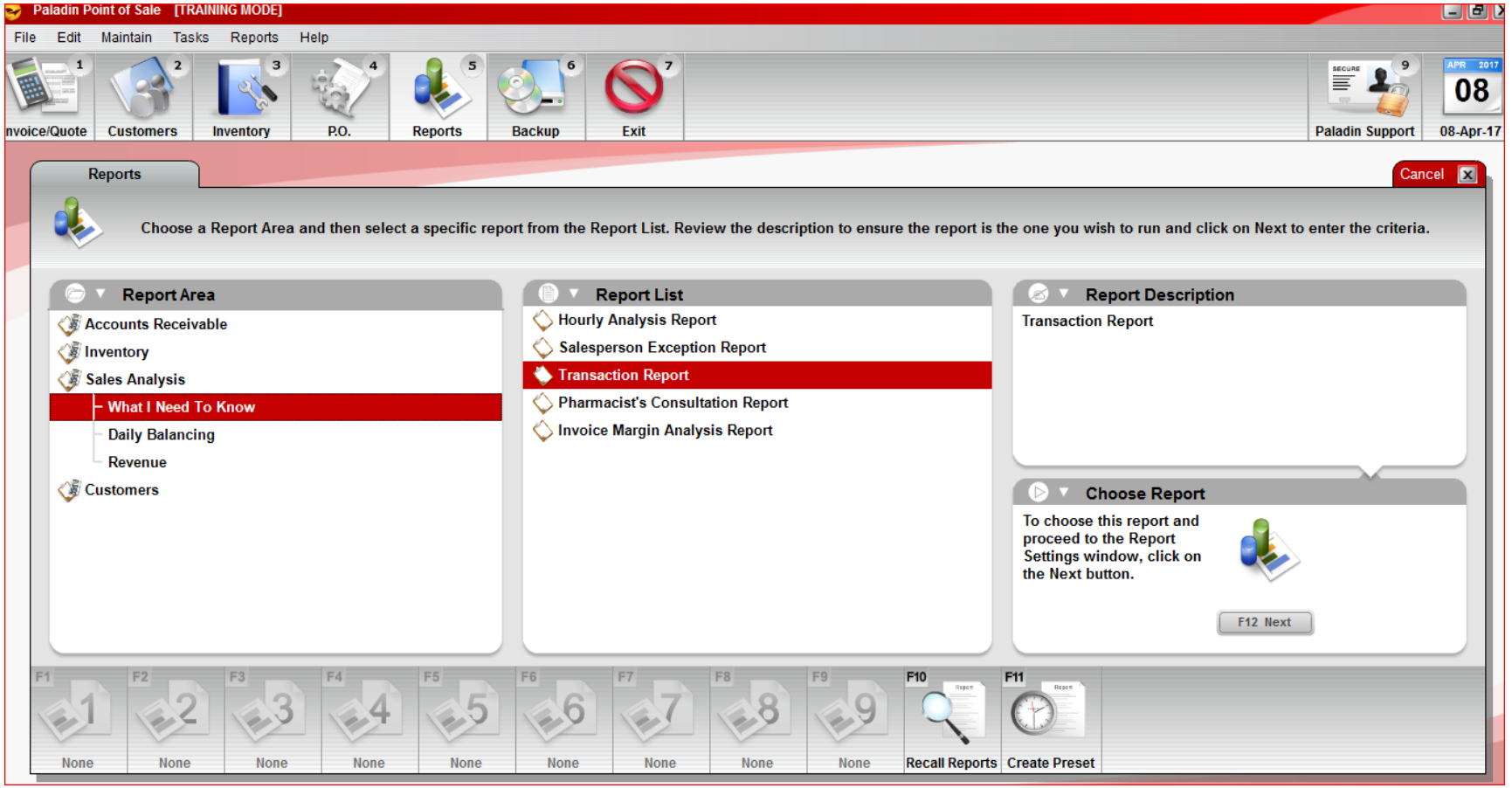
Create a payment report for ALL layaway orders



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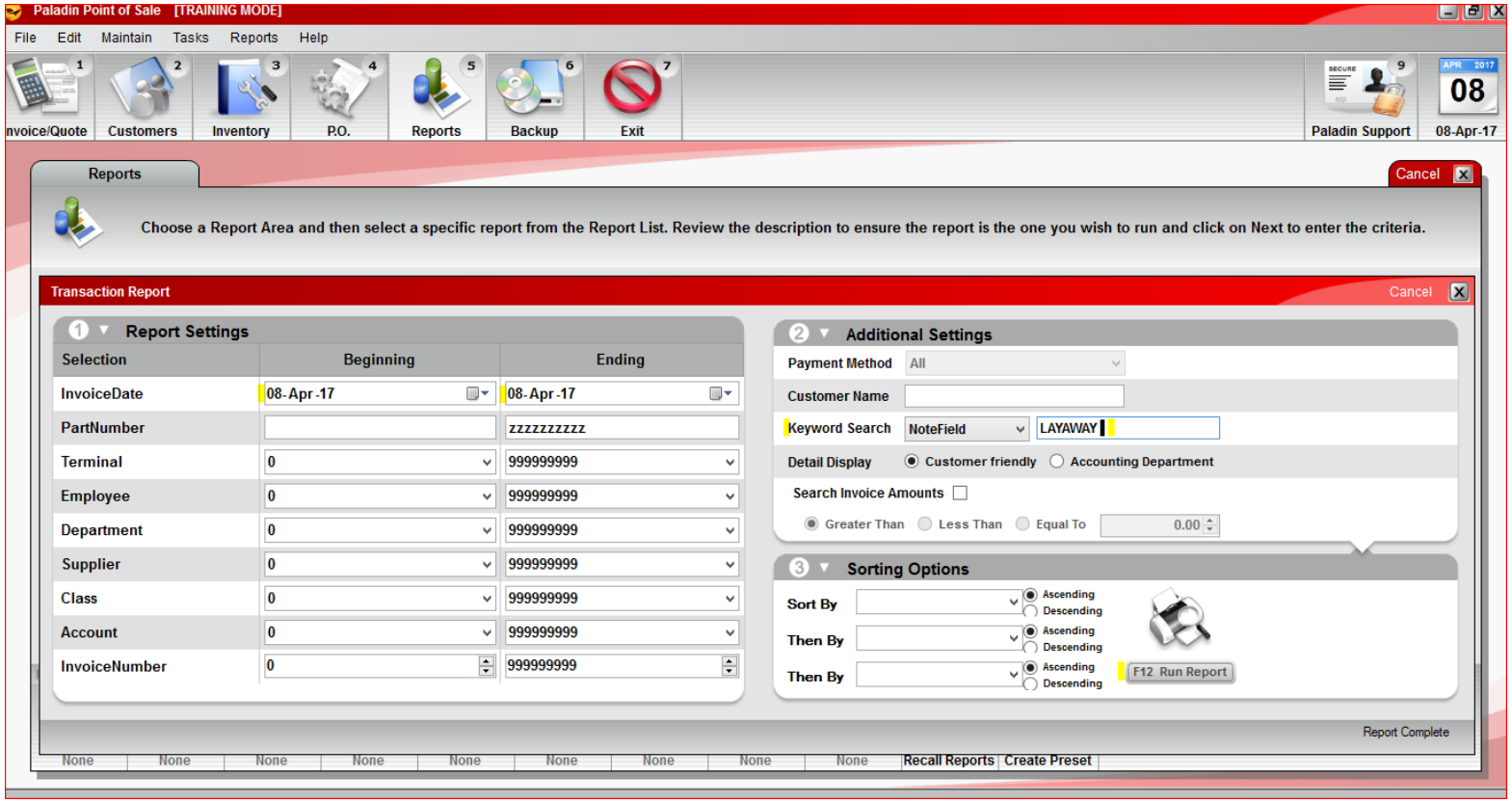
Creating a payment report for ALL layaway payments



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Report showing all received payments

PALADIN DATA CORP. **Customer Transaction Details** 08-Apr-17 01:49 By: 1 Page:1

T A X	D E F	N E T	Scan Number	Description	Part #	Qty	Price One	Sell Price	Per Qty	Ext	S E L	D I S C
			LAYAWAY CUSTOMER	Acct#:6	Inv:35	Term:2	Sales Person:1			08-Apr-17 00:37		
			Payment	Payment of $100.00 Layaway Payment		-1	0.00	-100.00 /	1	-100.00		
						ROACASH	100.00		Sub Total	-100.00		
									Total Tax	0.00		
									Grand Total	-100.00		

T A X	D E F	N E T	Scan Number	Description	Part #	Qty	Price One	Sell Price	Per Qty	Ext	S E L	D I S C
			TEST CUSTOMER	Acct#:1	Inv:37	Term:2	Sales Person:1			08-Apr-17 01:25		
			Payment	Payment of $100.00 Layaway Payment		-1	0.00	-100.00 /	1	-100.00		
						ROACASH	100.00		Sub Total	-100.00		
									Total Tax	0.00		
									Grand Total	-100.00		

T A X	D E F	N E T	Scan Number	Description	Part #	Qty	Price One	Sell Price	Per Qty	Ext	S E L	D I S C
			TRACI	Acct#:5	Inv:38	Term:2	Sales Person:1			08-Apr-17 01:24		
			Payment	Payment of $85.00 Layaway Payment		-1	0.00	-85.00 /	1	-85.00		
						ROACASH	85.00		Sub Total	-85.00		
									Total Tax	0.00		

How to view a layaway status

1. On the top ribbon, click the **Invoice/Quote** module.
2. In the **Customer** list, select the customer layaway account, or search for it using **Advanced Lookup**.
3. On the bottom ribbon, click **Account Payment** or press F5.
4. In the **Account Payment** window, the layaway amount will appear as a negative amount or credit in the **Charged (Not Due)** box.

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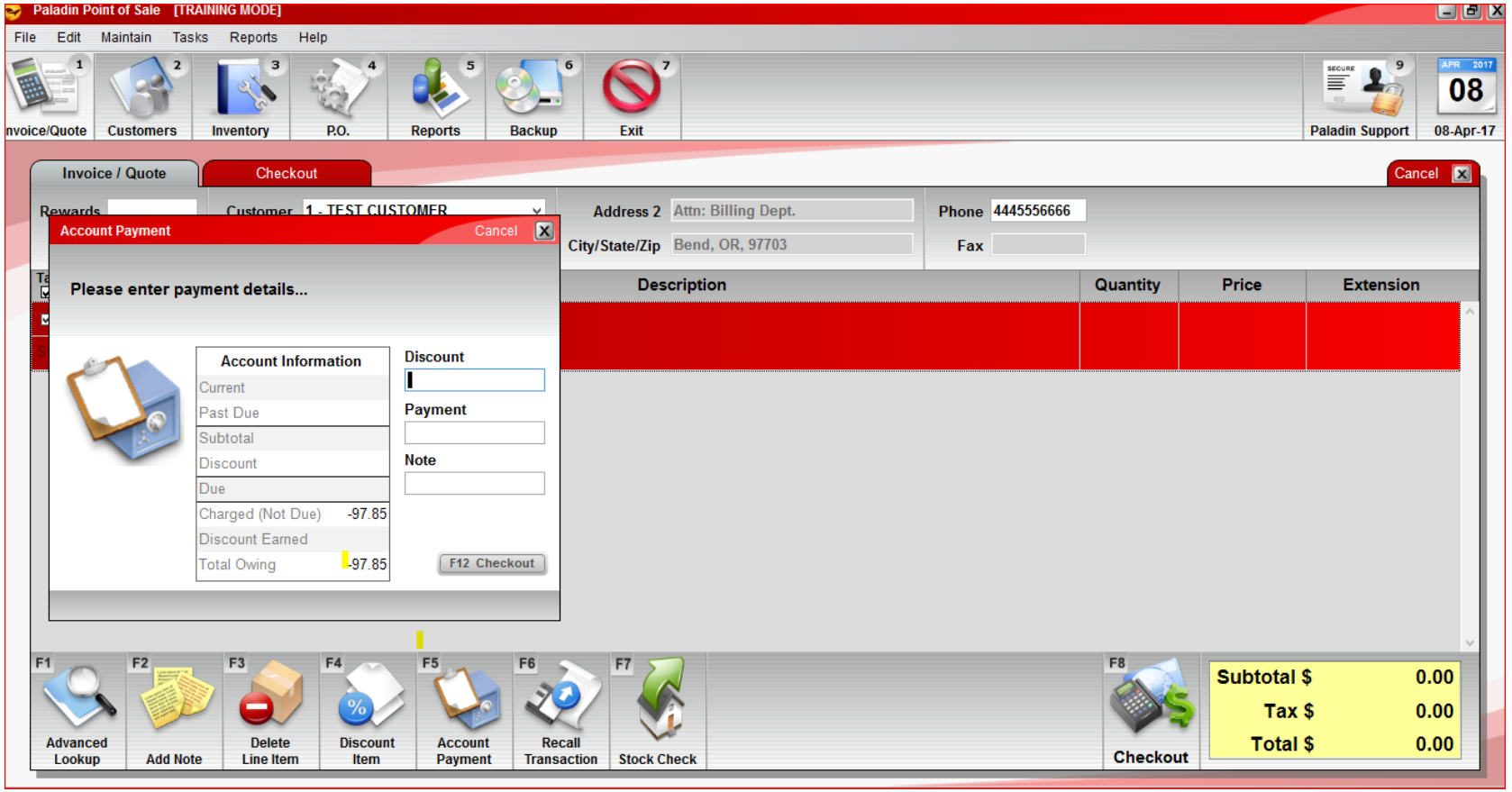
View a layaway status



Learn more

To learn more, see the following resources in our Help Portal:

- About layaway orders

A recording of this webinar will be available at portal.paladinpos.com/webinars.

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Recording available at:

portal.paladinpos.com/webinars

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