



## **User Manual**

**for**

**Portal Lay By Sub System**

Author: R Bird  
Date: 5th September 2005  
Version: 1.00

## ACCEPTANCE OF CONTENTS

The undersigned hereby accept the contents of this document as defining the Layby module.

REPRESENTATIVE	ORGANISATION	DATE	SIGNATURE
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## **PREFACE**

### **Scope of this document**

This document explains the functionality and setup of Lay By sub system in the portal.

### **Audience**

This document is intended for:

- The AMC CIT business personnel for approval.
- Portal Users

### **Related documents**

None.

### **Definitions**

- Customer Number: Reference linking the Customer to all related sub systems
- Card Number: Loyalty customer card number
- Sales - Sales information loaded from POS to the portal.
- PC or notebook that will interface via a browser
- POS - Point Of Sale System

## **OVERVIEW**

### **General overview**

The Lay By sub system allows goods to be purchased at the POS, and then paid by regular installments until fully paid, where as the goods then become the property of the purchaser and available for collection.

The portal will include non-editable data, such as sales information and other POS data, along with data manually entered (Editable) by the user.

### **Security**

User access to the reports is controlled via the normal Portal access methods. A user may be entitled to view or edit the Customer Address records and balances. The Company administrator sets the required privileges via the Portal user maintenance screens.

### **Hardware used**

Hardware may be a normal PC or laptop running any standard Internet browser. If using Internet Explorer it must be version 6 or greater. In the case of Firefox it must be version 1.0.4 or greater.

## User interface

Standard portal navigation and login is used.

## Business process

The portal receives transactions from the POS, with an internal indicator and details for the customer Lay Buy. The POS will have generated a second receipt to accompany the goods, a document that is signed by the purchaser and the standard terms and conditions of the lay buy (if required)

The functionality of the Portal is to support known customers, from Lay Buys, Loyalty, Debtors, Customer Orders and Home deliveries, allowing quick access for the POS to assign the Lay By to a customer. The POS also allows generation of new customers.

Portal reports allow for historical reporting and control of goods actually purchased and all payments.

## Reports

### Purpose

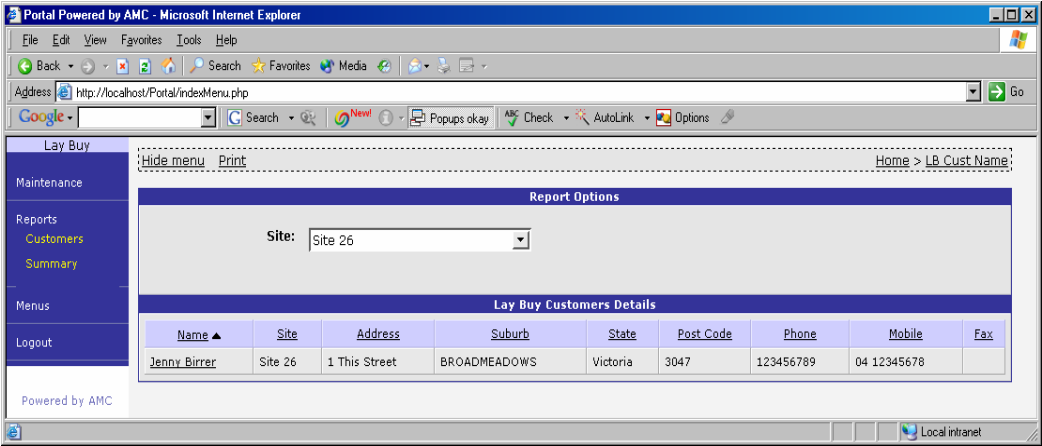
To report on customer activity given a users selection.

### Type of reports

There are two types of reports available.

#### 1. Customers

This report allows all previous customers that have used the Lay By system to be reported on.

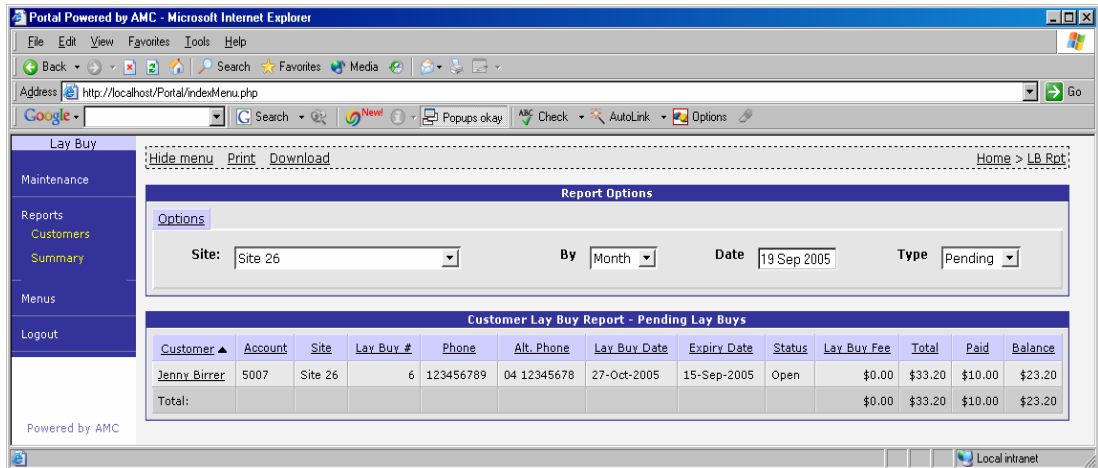


The screenshot shows a web browser window titled 'Portal Powered by AMC - Microsoft Internet Explorer'. The address bar shows 'http://localhost/Portal/indexMenu.php'. The page content includes a navigation menu on the left with options like 'Maintenance', 'Reports', 'Customers', 'Summary', 'Menus', and 'Logout'. The main content area has a 'Report Options' section with a 'Site' dropdown menu set to 'Site 26'. Below this is a table titled 'Lay Buy Customers Details' with the following data:

Name	Site	Address	Suburb	State	Post Code	Phone	Mobile	Fax
Jenny Birrer	Site 26	1 This Street	BROADMEADOWS	Victoria	3047	123456789	04 12345678	

#### 2. Summary

The Summary report allows a selection of current activity and status to be reported on



## Maintenance

### Purpose

To allow user updates, add or change Customer address or details.

### Maintenance Sections

The user may find the maintenance screens under the menu Lay Bys. The customer edit / new feature may be used to edit customers for Lay buys, Home Deliveries and Customer Orders provided the options are subscribed to and enabled.

## Navigation

### Selecting Multiple Rows

Multiple row selections may be done via the standard 'Windows' selection sort cuts.

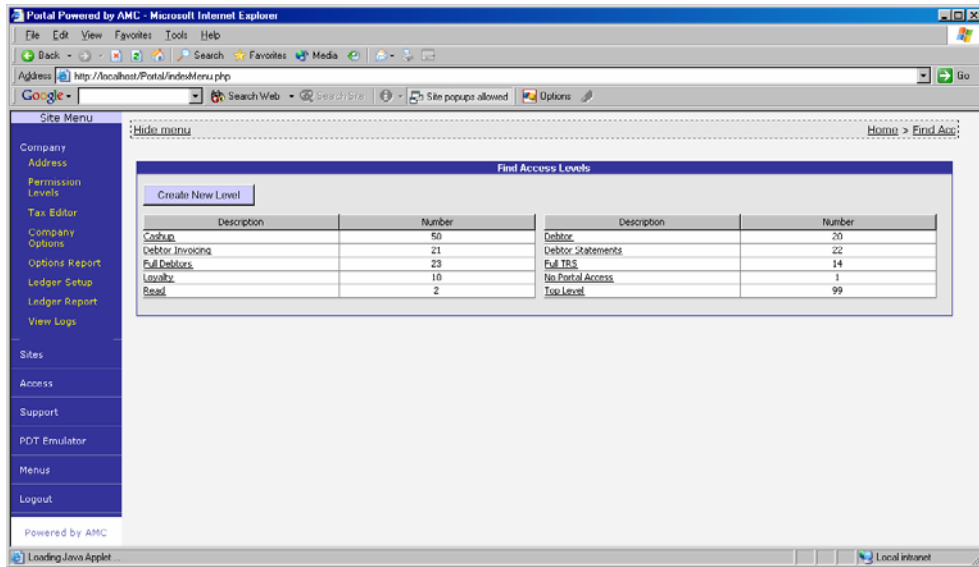
Multiple selections

1. Click first required line, then with shift key down click last. All lines between will be selected.  
Or
2. Click each line required with control key pressed. This selects each line clicked.  
Or
3. A combination of both shift and control keys will select a group between the clicks

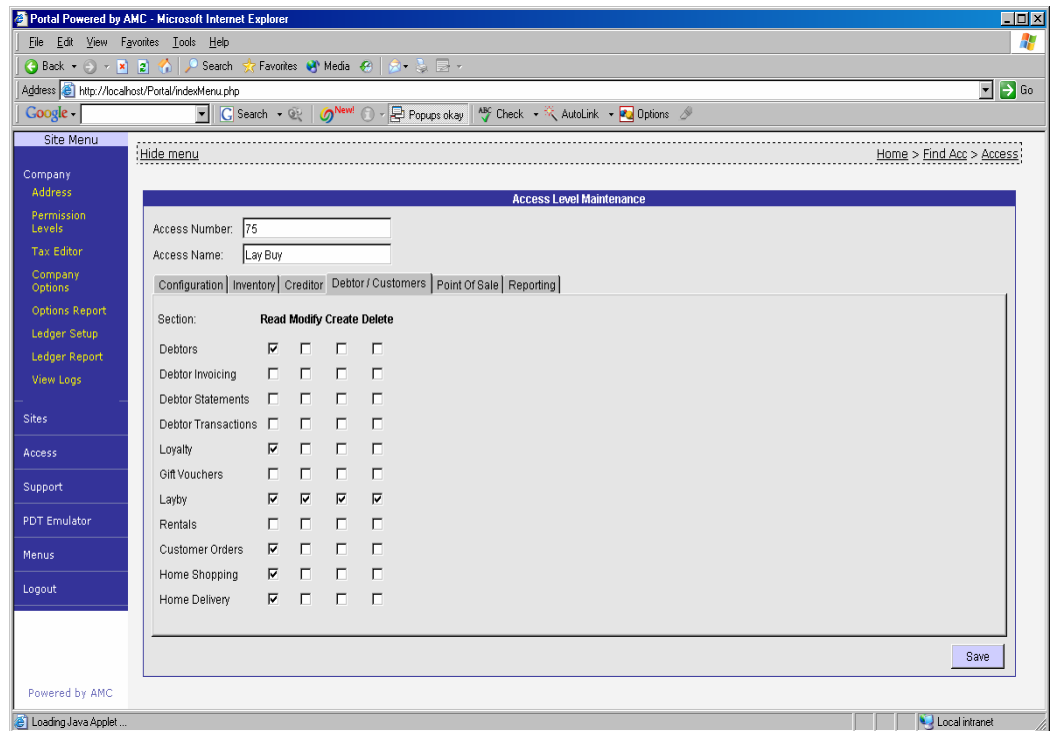
## Security

Select the Site Menu via the side menu. Note, the name of the menu may be some other description as this is a soft option within the portal. Examples are Store Menu, Branch Menu etc

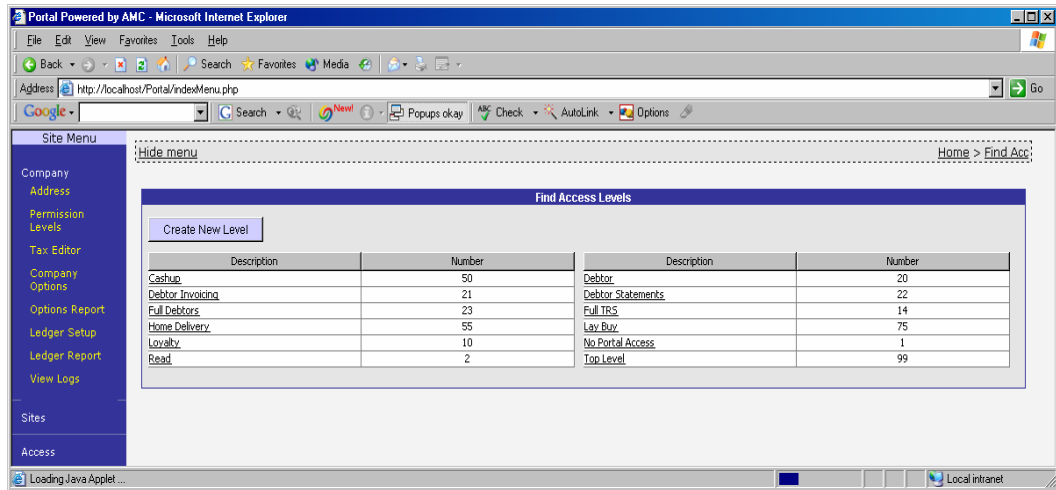
Click on 'Permission Levels'



If a Lay By exists, then *click* on it, else click on 'Create New Level' and create the required permissions level.

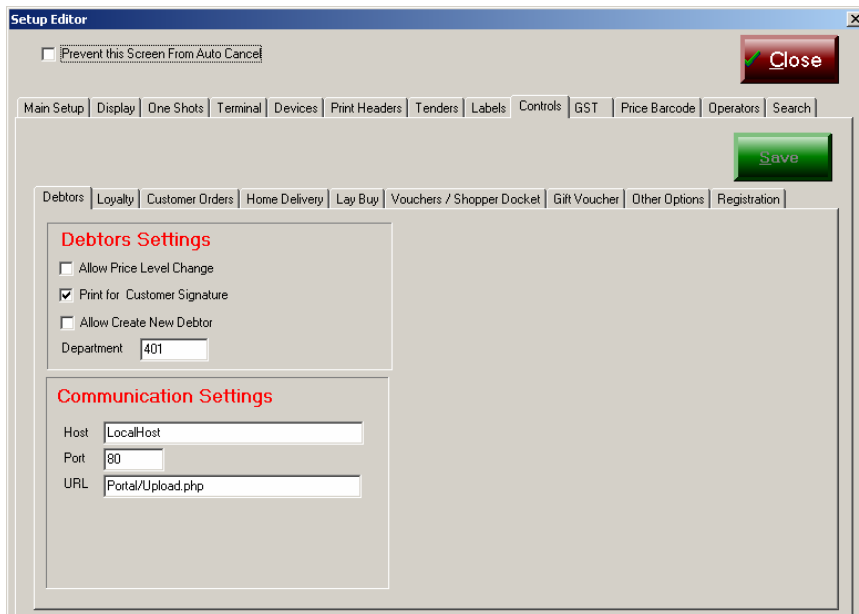


The user is required to have at least read permissions to run the reports and edit permission to change any of the settings or to add new Customers.



## Setup

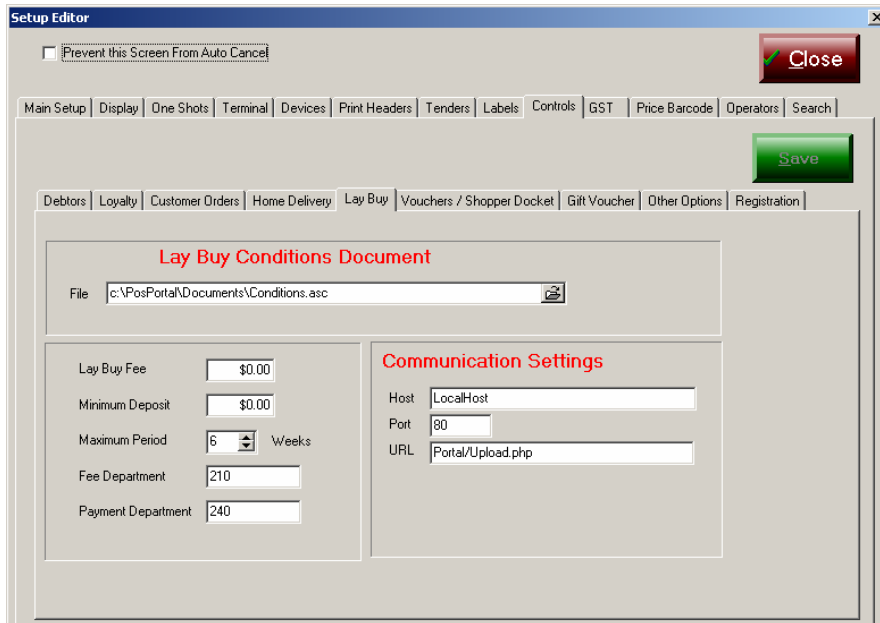
The POS setup area for Lay Bys is via the standard 'Setup' method for all other POS settings. Click the 'Setup Edit' from the 'Functions' page and select the 'Controls' Tab.



Then click the Lay Bys sub Tab

*Beware: Exercise caution that only the settings for Lay Buy are changed. If changes are inadvertently made to non lay-buy settings press the CLOSE button, without pressing the SAVE button.*

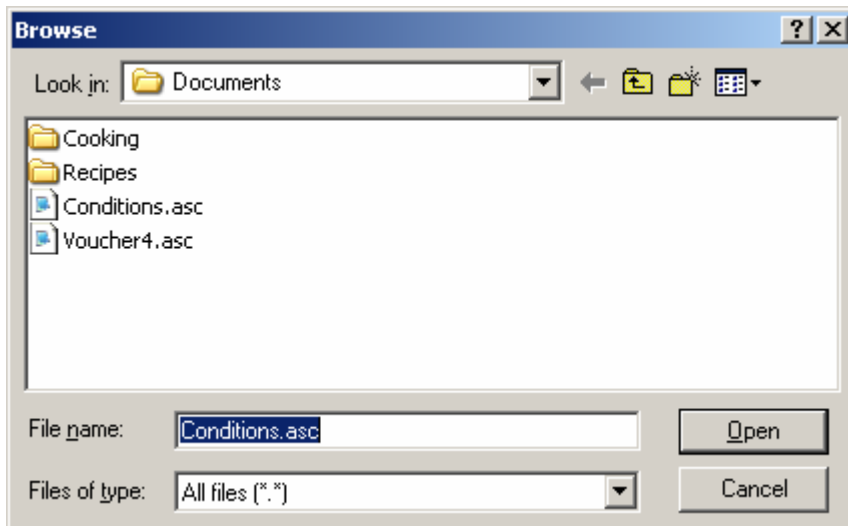




Set the minimum deposit, the Lay By fee and the maximum time (in weeks) of a valid Lay By. The Fee Department number and Payment department must be set to match the connected Portal for proper financial reporting. *In most cases the defaults are used.*

The communication settings are set to communicate with the controlling Portal, normally this is the same as the reporting Portal.

The lay buy **conditions** document (*Conditions.asc*) resides as specified in the “Lay By” sub tab, by file name and the path explicitly set under the “Lay Buy Conditions Document” field (*see above*). The user can use the ‘find’ selection to navigate to the file if not in the default location by clicking on the folder icon at the end of the file name



## Data Entry

### POS – New Lay By

The sales transaction at the POS is processed as normal. However, before tender is complete, the Lay Buy sub system is invoked by the operator on request of the customer for Lay By.

The Lay By sub system is normally configured on the functions page.

The lay by system will activate a customer search screen

Customer	Cust #	Phone	Address	Suburb
Birrer, Jenny	5007	123456789	1st This Street	BROADMEAD

The operator selects the search criteria depending on information given by the customer. Normally it is expected to be a loyalty card which can be swiped or scanned.

The other search methods are by customer number, or customer name. All three search methods support partial searches. i.e. RED will find Fred Smith, Alan Redled etc.

The operator enters in at least three characters and clicks find. The system will then return all matching records from the Portal.

To select the required customer, click or touch their details line and 'Select'

If the customer is a new one, then the operator clicks 'New' and starts to enter in the customer details.

**New Customer**

Ms First Name

Surname

Address

Suburb

State

Post Code

Phone #

Mobile Phone

1 2 3 4 5 6 7 8 9 0

Q W E R T Y U I O P

A S D F G H J K L

Z X C V B N M Shift

.  Clear

Accept

Cancel

When done, click 'Accept'.

The POS will then return back to the details of the Lay By screen to capture the required information.

**Create Lay Buy - Version 1.00**

Customer

Account

Phone:

Address

Close

Accept

7 8 9

4 5 6

1 2 3

0 Clear

Find

Transaction Total

Deposit  \$10.00

Lay Buy Fee

Amount To Pay

A Lay By fee may be set along with a minimum deposit. 'Accept' is clicked to complete the transaction.



The transaction is now tendered as normal.

The POS generates a special receipt to be attached to the Lay Buy goods. The amount payable is a total of the Deposit and the layby Fee only.

**Docket 1** -----

Merchant Copy

HURSTVILLE  
 Tel: 9579 1083  
 Customer Service: 1800 252 251

Item 1	\$17.60
Item 2	\$15.60
Item 3	\$31.90
Item 4	\$9.90
Lay By Fee	\$0.00
Lay By Deposit	\$10.00
Sub Total	\$85.00
Lay By Items	-\$75.00
-----	
Total	\$10.00
CASH	-\$10.00

Change Due \$0.00

GST \$6.82 Included

Customer Signature:.....

Please retain your receipt as proof of  
 purchase for refunds and exchanges

OPERATOR: Alicia  
 ITEMS: 6  
 TERMINAL: 1  
 JOURNAL: 00422 19-Sep-2005 10:54

**Docket 2** -----

HURSTVILLE  
 Tel: 9579 1083  
 Customer Service: 1800 252 251

Item 1	\$17.60
Item 2	\$15.60
Item 3	\$31.90
Item 4	\$9.90
Lay By Fee	\$0.00
Lay By Deposit	\$10.00
Sub Total	\$85.00
Lay By Items	-\$75.00
-----	
Total	\$10.00
CASH	-\$10.00

Change Due \$0.00

GST \$6.82 Included

Please retain your receipt as proof of purchase for refunds and exchanges

OPERATOR: Alicia  
ITEMS: 6  
TERMINAL: 1  
JOURNAL: 00422 19-Sep-2005 10:54

**Docket 3**-----

HURSTVILLE  
Tel: 9579 1083  
Customer Service: 1800 252 251

CUSTOMER COPY

\*\*\*\*\* Lay By \*\*\*\*\*

Lay By # 11

Name Birrer, Jenny  
Account 5007

Address 1st This Street  
BROADMEADOWS  
Victoria, 3047

Phone 1234567890

Lay By Fee \$0.00  
Lay By Deposit \$10.00  
Balance To Pay \$65.00  
Last Payment By 31 Oct 2005

This is a sample output of Lay Buy Conditions

Place all the conditions of Lay Bys in **Conditions.asc** or as per configuration

Please retain your receipt as proof of purchase for refunds and exchanges

OPERATOR: Alicia  
ITEMS: 6  
TERMINAL: 1  
JOURNAL: 00422 19-Sep-2005 10:54

**Docket 4**-----

MERCHANT COPY

Please Staple to Lay By

\*\*\*\*\* Lay By \*\*\*\*\*

**Conditions.asc** contains the lay-by conditions is edited at Windows level, using NOTEPAD and saved to the directory indicated under the MENU, FUNCTIONS, SETUP EDIT. Then choose the CONTROLS tab and the LAYBY sub-tab. *This file is printed on the receipt here. The directory & filename are specified explicitly under this tab.*

Lay By # 11

Name      Birrer,Jenny  
Account    5007

Address    1st This Street  
              BROADMEADOWS  
              Victoria, 3047

Phone      1234567890

Lay By Fee \$0.00  
Lay By Deposit \$10.00  
Balance To Pay \$65.00  
Last Payment By 31 Oct 2005

Please retain your receipt as proof of purchase for refunds and exchanges

OPERATOR: Alicia  
ITEMS:     6  
TERMINAL: 1  
JOURNAL:   00422 19-Sep-2005 10:54

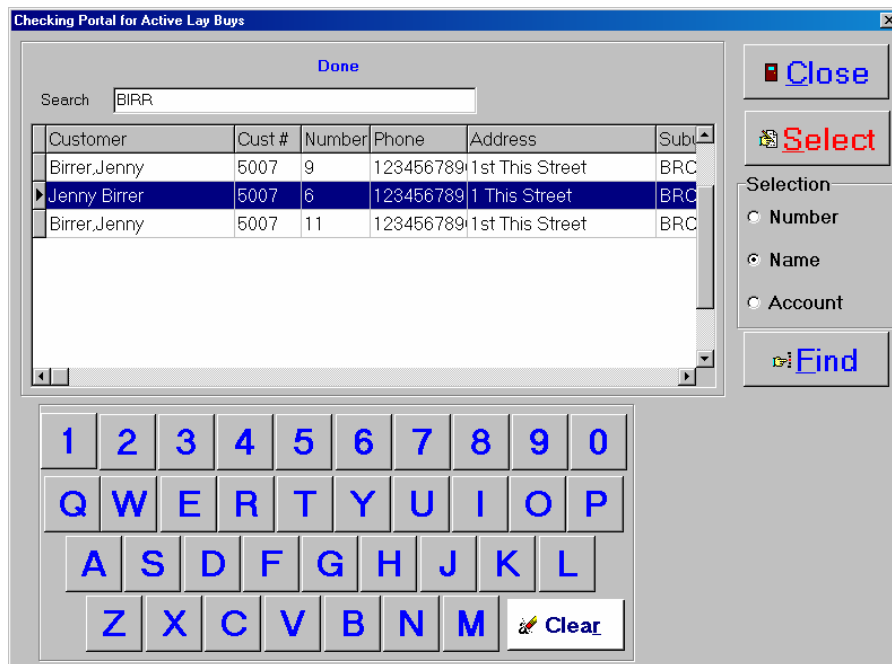
-----

The POS is free to proceed with the next transaction.

## POS – Payment

Lay By Payments may be made via the POS. They can also be added as part of other purchases if required.

The operator selects Lay By Payments via the function page and selects the method of search.



If the Lay By number is known, then enter the full number and search via the 'Number' option, else the search can be done via account or name. The list may be sorted by clicking on the column header. To reverse the order of the sort click again.

Select the Lay By to make a payment against, being careful to select the correct Lay By where there are multiple Lay Bys per customer. If there is nothing left to pay, the selection will not be visible.

Lay Buy Payment - Version 1.00

Customer Number:

Customer Name:

Lay Buy Number

Current Balance

Last Payment By

Payment Amount:

Amount To Pay \$10.00

7 8 9  
4 5 6  
1 2 3  
0 00  
. Clear

Enter in the amount to pay and click 'Ok'

The amount will now be added to the current transaction, which may then be tendered as normal. The receipt printed for the customer has the outstanding balance and the date of last payment to be made. The POS will not allow over payment of a Lay By.

-----  
HURSTVILLE  
Tel: 9579 1083  
Customer Service: 1800 252 251

Lay By Payment                   \$10.00  
Payment For Account 5007  
Name : Birrer,Jenny  
Lay By Number : 11  
Balance : \$55.00

Last Payment Due by 31 Oct 2005

-----  
Total                               \$10.00  
CASH                               -\$10.00

Change Due           \$0.00

Please retain your receipt as proof of  
purchase for refunds and exchanges

OPERATOR: Alicia  
ITEMS: 1  
TERMINAL: 1  
JOURNAL: 00425 19-Sep-2005 12:09  
-----

In the case of a Lay By being paid in full, the POS will generate two docket. The first docket is for the customer to sign and the merchant to keep as proof of goods supplied. The second docket is for the customer.

**Docket 1** -----  
Merchant Copy

HURSTVILLE  
Tel: 9579 1083  
Customer Service: 1800 252 251

Lay By Payment \$55.00  
Payment For Account 5007  
Name : Birrer,Jenny  
Lay By Number : 11  
Balance : \$0.00

Payment In Full

Please Present this docket  
to collect the goods

Lay By Number : 11

-----  
Total \$55.00  
CASH -\$55.00

Change Due \$0.00

Customer Signature:.....

Please retain your receipt as proof of  
purchase for refunds and exchanges

OPERATOR: Alicia  
ITEMS: 1  
TERMINAL: 1  
JOURNAL: 00426 19-Sep-2005 12:13

**Docket 2** -----

HURSTVILLE  
Tel: 9579 1083  
Customer Service: 1800 252 251

Lay By Payment \$55.00  
Payment For Account 5007  
Name : Birrer,Jenny  
Lay By Number : 11  
Balance : \$0.00

Payment In Full

Please Present this docket  
to collect the goods

Lay By Number : 11



-----  
 Total \$55.00  
 CASH -\$55.00

Change Due \$0.00

Please retain your receipt as proof of purchase for refunds and exchanges

OPERATOR: Alicia  
 ITEMS: 1  
 TERMINAL: 1  
 JOURNAL: 00426 19-Sep-2005 12:13  
 -----

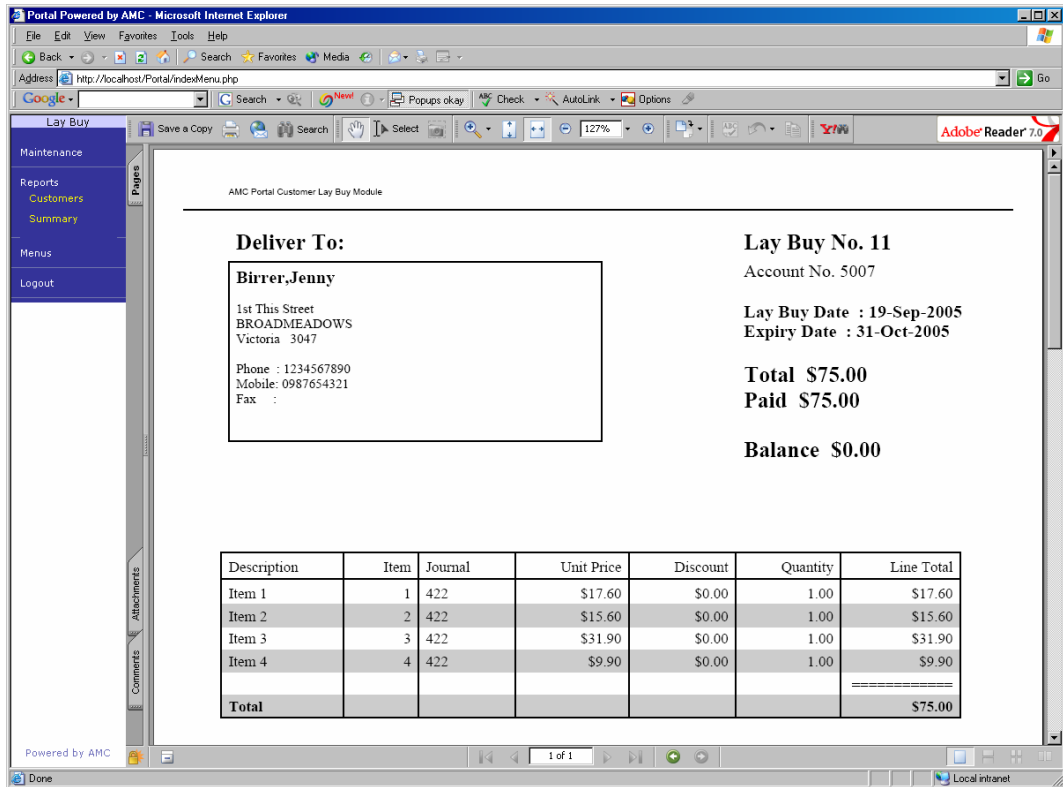
## Portal Report

The screenshot shows a web browser window with a navigation menu on the left and a main content area. The main content area displays a 'Report Options' section with filters for Site (Site 26), By (Week), Date (19 Sep 2005), and Type (Pending). Below this is a table titled 'Customer Lay Buy Report - Pending Lay Buys'.

Customer	Account	Site	Lay Buy #	Phone	Alt. Phone	Lay Buy Date	Expiry Date	Status	Lay Buy Fee	Total	Paid	Balance
Bird, Fred	6004	Site 26	10	11111111	40000000	31-Oct-2005	19-Sep-2005	Open	\$0.00	\$17.60	\$5.00	\$12.60
Birrer, Jenny	5007	Site 26	11	1234567890	0987654321	31-Oct-2005	19-Sep-2005	Open	\$0.00	\$75.00	\$75.00	\$0.00
Birrer, Jenny	5007	Site 26	9	1234567890	0987654321	31-Oct-2005	19-Sep-2005	Open	\$0.00	\$43.10	\$10.00	\$33.10
<b>Total:</b>									\$0.00	\$135.70	\$90.00	\$45.70

Reporting of pending or delivered Lay By is obtained via the summary option under the Lay By reports.

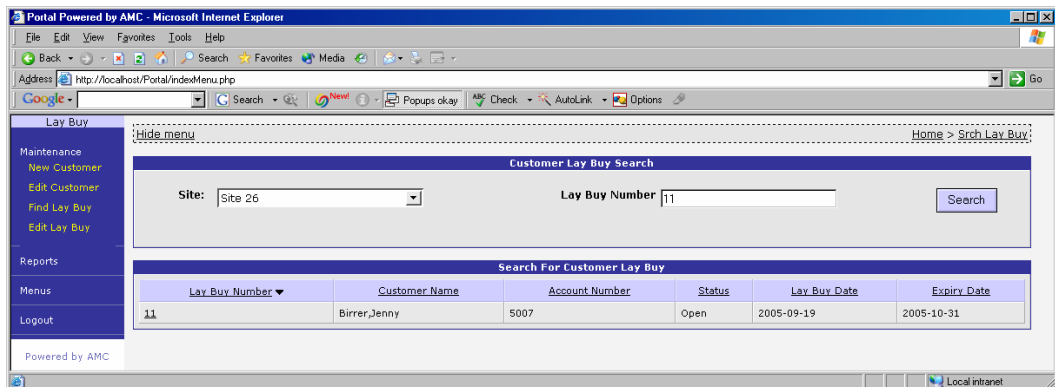
Drilling down from the summary, allows reprinting of the Lay By details

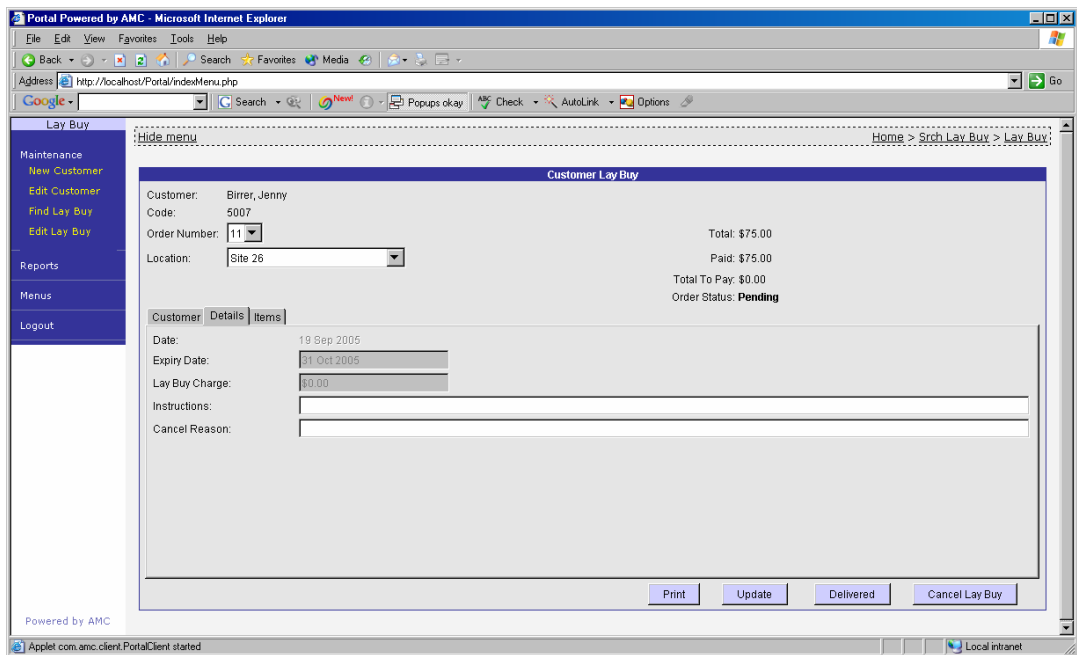
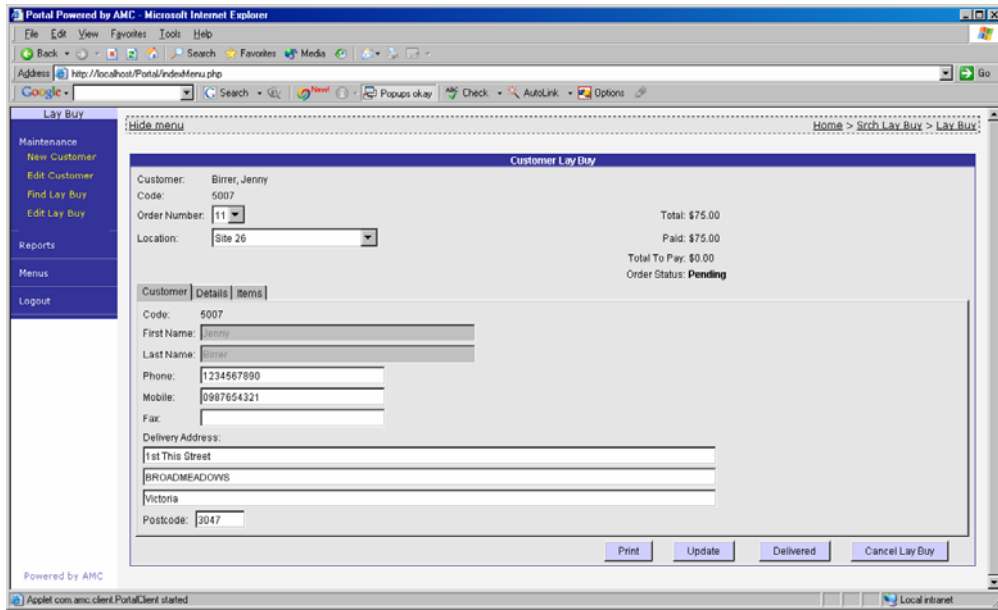


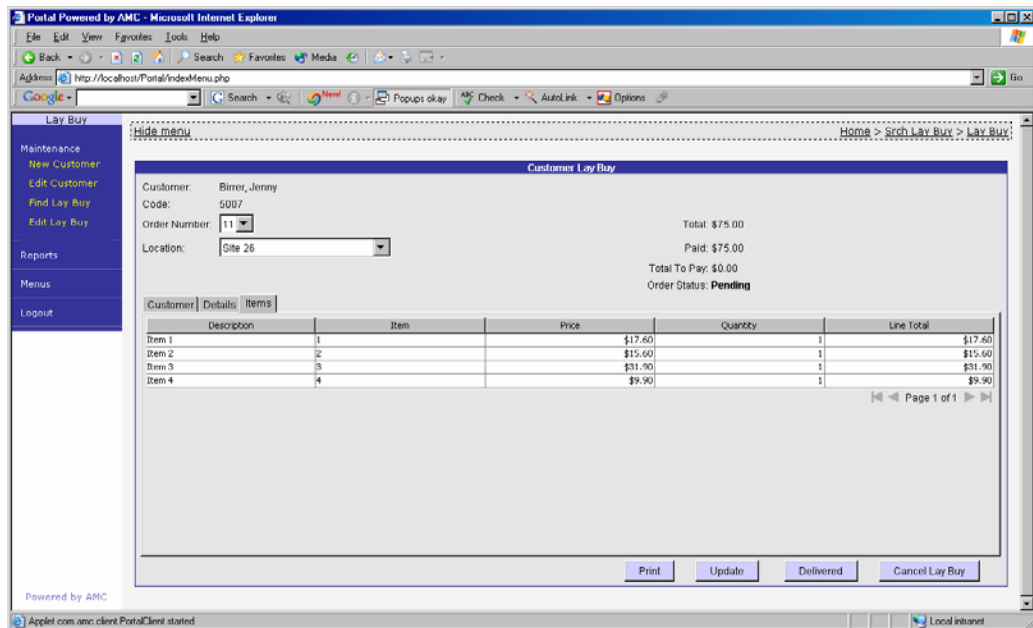
### Confirmation of Goods Pick Up

The last phase of the Lay By sub system is to record that the pick up has been completed.

The portal user may find the lay by either by the customer or by the lay by number







To set the Lay By as Complete, click the 'Delivered' button.

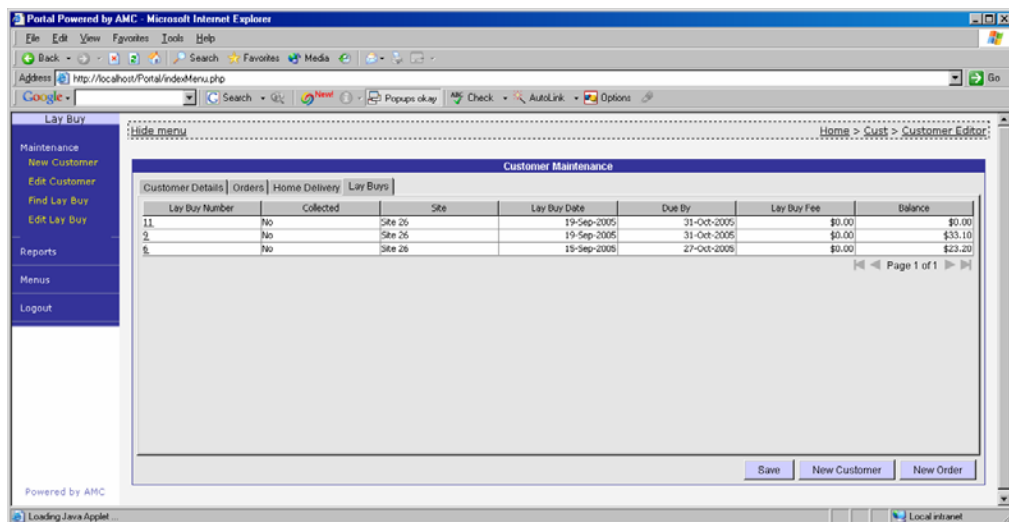
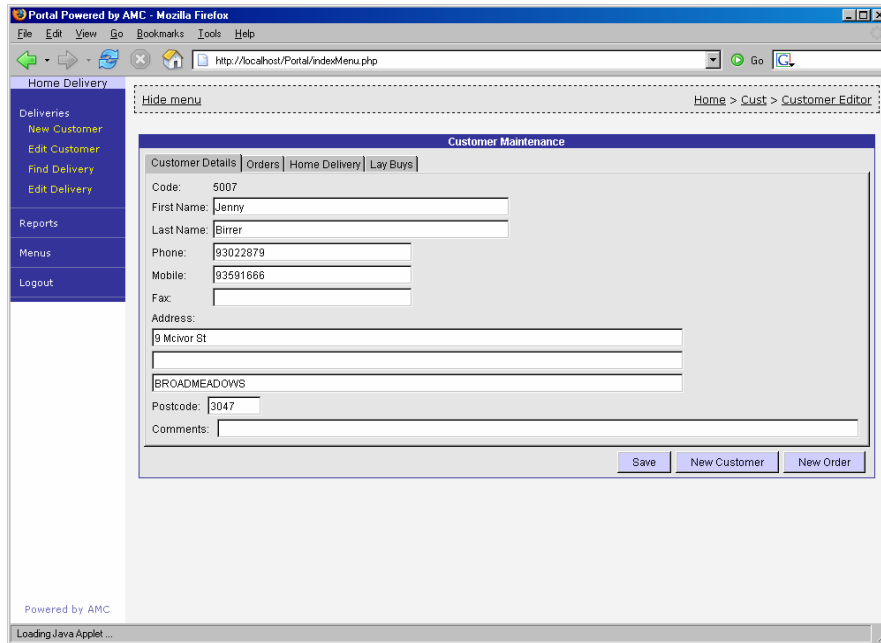
After confirmation of that the customer has received the goods, the Portal will decrement the Stock from inventory, close the Lay By and update the sales information for the Items.

## Lay By Delete

The Lay By system allows for a lay buy to be deleted by a Portal user with the correct access. There is a requirement to enter in the reason for the deletion, such as payments not completed within the correct time frame. The stock that was part of a *deleted* lay-by is placed back into the retailing area. No stock adjustment is required, the stock on hand is not decremented in a lay-by until the items have been paid for & flagged as delivered.

## Customer Edit

The Lay By, Customer Order and Home Delivery systems are integrated, allowing a 'one' stop data entry point.



Drill down to Orders, Deliveries or Lay Bys is available from the customer edit screen. If the customer is a Loyalty or Account customer as well, the updating of the address details will also update the other sub systems respectively.

## Future Possible Changes

In a later version:

1. A *refund* option may be available.
2. An ability to correct *mis-payments* may be available.
3. Lay-by delivery at POS may be available.