LAYBYS

ChreoS

Application	ChreosClient – Chreos 3
Module	Clients
Access	Various
Minimum service pack	SP26
This document	Laybys
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Overview

There are a number of different screens in Chreos that deal with laybys due to the different processes involved. This information sheet brings together all of that information into one place for easy access and reference.

To Create a Layby

- Select the menu option "Stock | Point of sale". Note: For further details about the point of sale refer to "Point of sale (5.3)".
- Select the required client. Refer to "Client search (1.3)".
- Select the required stock item. Refer to "Item search (1.5)".
- Click the [New Layby] button.
- The cost of the item, name of the item, client and target price will be displayed.
- Enter the amount of the deposit into the 'Amount' entry field.
- Enter a comment about the layby if required.
- Click the [Save] button.
- Process the sale. Refer to "Point of sale (5.3)".
- Note: It is only possible to layby one item at a time. It is not possible to layby a group of items together. However it is possible to one client to have many laybys at one time.

To Take a Payment on a Layby Including the Final Payment

- Select the menu option "Stock | Point of sale".
- Select the required client. Click the [Old Layby] button.

- Select the required layby item. Note: All of the items that the client has on layby will be available to select.
- Once a client and item have been selected the amount owing, target price, opening date and comment will be displayed.
- Enter the amount of the payment into the 'Amount' entry field.
- Click the [Save] button.
- Process the sale. Refer to "Point of sale (5.3)".
- When the final payment of the layby has been paid a confirmation message will appear alerting you to the fact that it has been paid in full. It will also ask if you want to issue the goods to the client. Select the [OK] button.

To View and Edit a Layby

- Select the menu option "Clients | Laybys".
- All of the existing laybys in the system will display the 'Client name', 'Item name', 'Date', 'Trust balance', 'Target price' and 'Balance'.
- Select the required layby.
- Click the [Edit] button.
- Change the target price in the 'Target price' entry field. It is not possible to edit any other details.
- Click the [Save] button.

To Cancel a Layby

- Select the menu option "Clients | Laybys"
- Select the required layby.
- Click the [Cancel Layby] button.
- A confirmation message will appear saying that if the layby is cancelled the amount of the deposit will move to an unspecified trust account.
- Click the [OK] button to cancel the layby.

To Refund the Deposit of a Cancelled Layby

- Select the menu option "Stock | Point of sale".
- Select the required client.
- Click the [Trust] button.
- Enter the amount to be refunded. Note: If you do not know the exact amount once the 'Item name' is selected the balance will be displayed. The item in this case is 'Unspecified trust account'.
- Select the unspecified trust account from 'Item name'. Any other laybys that the client has will also be displayed by their item name in this combo.

- Click the [Save] button.
- The 'Point of sale' screen will now display the amount of the deposit as change owing to the client.
- Process the sale. Refer to "Point of sale (5.3)".

To Transfer the Balance of One Layby to Another

- Cancel the layby and refund the balance as above but do not process the sale.
- Click the [Old layby] button and enter the amount of the refund on the 'Amount' entry field.
- Select the required layby item.
- Click the [Save] button.