Rainchecks and Layaways

Customer:
Hi there! I saw that grill in your ad, do you have any left?

Andrew:
I'm sorry, we're actually out, but I can process a raincheck for you! That way when we get them in stock again, we can honor the sale price for you!

Customer:
That would be great, let's do it!

Andrew:
You can use Rainchecks to honor prices for out of stock items. On the other hand, layaways, let you reserve a product for a later time. This way the customer can pay for it bit by bit ahead of when they need it. Pick a topic and we'll show you how they work.

Topics

- Rainchecks

- Layaways

Rainchecks

There are two different types of Rainchecks on the Eagle system. Basic and Advanced.

The Basic just prints a receipt for the customer, while an Advanced Raincheck creates a saved transaction.

The differences between the two types of Rainchecks are most apparent when the customer returns to buy the items on their Raincheck.

Let's look at both types, beginning with the Basic one.

We will start in Point of Sale, with our customer who wants to buy a hammer and needs a Raincheck.

With your cursor in the Item field, either open the Menu KPad and select Create Raincheck or press Start Transaction from the Ribbon Menu and select Raincheck.

When you return to the posting screen, your cursor will be in the customer field and Rain Check will appear in the upper left-hand corner.

Now you are ready to specify who the Raincheck is for.

If it is for an established customer, bring up their information.

Then specify how long will the rain check be honored.

The Good until date defaults to the number of days set in Options Configuration. You can change it if necessary.

If the rain check is for a cash customer, enter the phone number and customer's name in the window that appears.

Press OK or Enter to return to the Item field.

Once you've entered the SKU and the quantity for the Raincheck item, press Enter to post the item to the transaction.

The usual methods of posting items are available, even though this is a Raincheck rather than a sale.

Just be sure to include the promotional price.

Total the transaction.

Since this is a Raincheck, you won't tender the sale at this point.

A receipt prints for the customer instead, and you can decide whether to print a duplicate to keep for your records.

To use Advanced Rainchecks, Option 5413 must be set to Yes on your system.

You create Advanced Rainchecks the same way as basic Rainchecks, but instead of just having a printed receipt, Eagle saves the transaction in Point of Sale and tracks it in Inventory.

You also gain the ability to use the Promo key to create as well as sell the rain check item.

Layaways

Like Rainchecks, you enter Layaways through Point of Sale.

Begin by selecting Start Transaction on the Ribbon menu and selecting Layaway.

Since you started the transaction with the default Cash customer selected, you'll need to enter their information.

Make sure your cursor is in the Customer field and then select Header.

Enter their information and then select Post.

Creating a Layaway is straightforward: just post the items as usual and total the transaction.

Instead of the Totals screen, however, you'll see the Finish Layaway menu.

Select Save and print to get a printed copy of the layaway.

Type the initial deposit when prompted and finish the transaction, giving the customer their receipt.

Be sure to make a note of the document number for future reference.

With a layaway, customers pay off the balance over an extended period of time. Each time the customer comes back to make a payment, you'll recall the layaway and apply the new payment. At any time, customers may choose to pay off the remaining balance and pick up the layaway order.

There are several ways to recall a layaway. If you have a receipt with a barcode on it, simply scan the barcode.

If you know the layaway number, type a period followed by the layaway number in the Customer field and press Enter.

Otherwise, select Menu Kpad and choose Documents.

Select Layaways as the Type of document and press Refresh. You can also type "LWY" followed by the customer's phone number in the Short ID field and press Refresh.

Find and select the Layaway that you want, and then choose Select.

After recalling the layaway, a menu appears asking what you want to do with this layaway.

Let's say that your customer is making another payment. When you select Apply a Payment, Eagle prompts you to type a Deposit Amount.

Notice that you have the option to make a refund from this window. If the customer decides to CANCEL the layaway, you can refund the customer's original deposit and any additional payments applied to the layaway by pressing the Refund key.

Selecting Cancel returns you to the item posting screen. If restocking fees or service charges for returning a layaway apply, you can enter those fees now.

Then total the transaction and refund any monies paid.

If the customer is picking up the layaway, then you would choose Apply the final payment and the system will take you to the Totals Menu where you can tender and close the layaway.

Notice that Eagle calculates the balance due for you.

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