Payments & Customer Documents

Collect payments, track balances, review payment history, and provide receipts and statements.

- How to Take a Partial Layaway Payment
- How to Pay the Remaining Balance in Full
- How to View Layaway Payment History
- How to View or Print a Layaway Statement and Receipts
- How to Correct a Same-Day Layaway Payment

How to Take a Partial Layaway Payment

Navigation: Layaway → History → open the layaway.

1. Confirm the customer and current balance.
2. Select the payment action.
3. Enter an amount that does not exceed the balance.
4. Select the payment method and finish checkout.
5. Give the customer the payment receipt.

The profile updates the total paid, percentage paid, payment count, and remaining balance.

How to Pay the Remaining Balance in Full

Navigation: Layaway → History → open the layaway.

1. Review the remaining balance and merchandise.
2. Select the payment action and choose the full remaining amount.
3. Complete payment using the correct method.
4. Confirm the balance is zero.
5. Continue to completion and delivery when the merchandise and serial numbers are ready.

Receiving full payment does not replace the final merchandise and serial-number check.

How to View Layaway Payment History

Navigation: Layaway → History → open the layaway → Payment List.

The payment list provides an audit trail of money collected for the layaway. Review payment dates, amounts, methods, and associated receipts before answering a balance question or processing a correction.

Compare the list total with the Paid and Balance Due figures on the profile. If they do not match your expectation, review refunds, cancellations, or same-day corrections before taking another payment.

How to View or Print a Layaway Statement and Receipts

Navigation: Layaway → History → open the layaway.

Statement

Select **View Statement** to show the full layaway account: merchandise, payments, and remaining balance. Print or share it when the customer needs a current account summary.

Payment receipt

Open the appropriate payment from the payment list to view or print its receipt. A receipt proves one transaction; a statement summarizes the overall layaway.

How to Correct a Same-Day Layaway Payment

Payment deletion is restricted to the currently open day end. This protects closed financial records.

1. Open the layaway and its Payment List.
2. Verify the incorrect payment, amount, method, and date.
3. If it belongs to the current day end, use the available delete action.
4. Confirm the balance has returned to the expected amount.
5. Enter the corrected payment and provide the new receipt.

If the payment belongs to a closed day, do not work around the restriction. Follow your manager’s approved refund or accounting correction process.