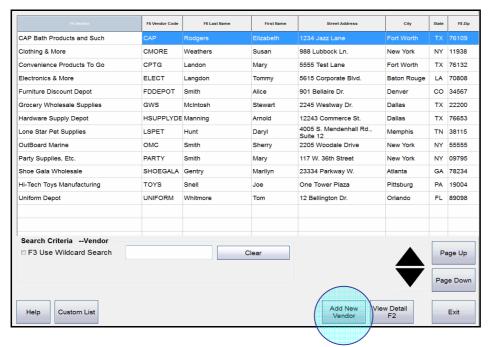# ADDING A VENDOR IN CAP SELLWISE PRO
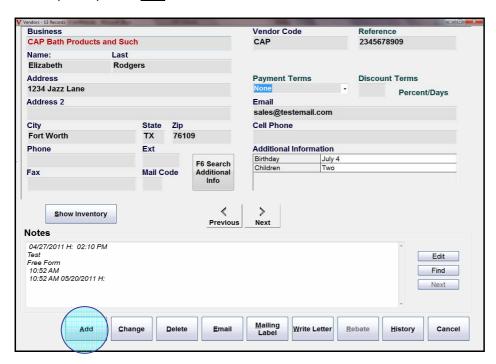
"GETTING STARTED GUIDE"

From the CAP SellWise Pro tool bar, select **Vendors**.

From the Vendor lookup screen (above) select **Add New Vendor** or from the Vendor **View Detail** screen (below) select **Add**.

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Your cursor will automatically start in the Business field. Add the Vendor information and press the TAB key to go to the next fields. Once you have added all necessary information, click **Accept**.

Most of these fields should be self explanatory, however below is a list of fields that may not be:

Vendor Code – The software will automatically populate this code once you tab away from the Business Name. If you wish to change it, you only have one chance because once the Vendor information is saved, this code will be set.
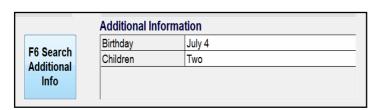
Reference – This is a field where you enter your customer number that the Vendor has assigned. The customer number will show in all purchase orders.

Mail Code – This field is 1-2 characters long and can be used to group like Vendors for things like mailings.

Payment Terms – The condition of paying for an on account sale that the Vendor has set for your business. Select from the drop down.

Discount Terms – This is the field where you can apply any additional discount information. For example, the Vendor may give you an additional 2% off your bill for an early payment.

Additional Information- This will need to be created in the Configuration module before you define them in the Vendor's record. Ex. Birthday, expiration date, alternate contact #, etc. Once this is defined in the Configuration module, you can enter the Vendor's website information, for example. You are also able to search your additional information by clicking the **F6 Search Additional Info** (below)**.**

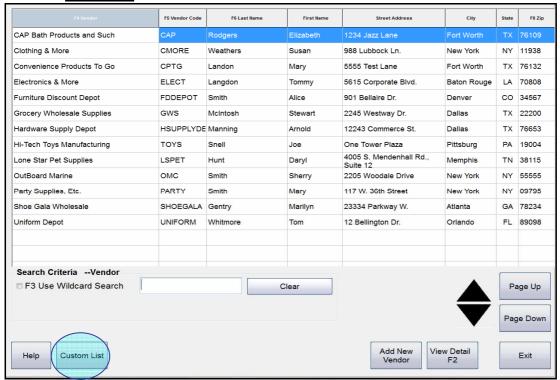| F6 Search Additional Info	Additional Information	
	Birthday	July 4
	Children	Two

Show Inventory- Lists all inventory items specific to the Vendor to include quantity on hand, on order, price and date last sold.
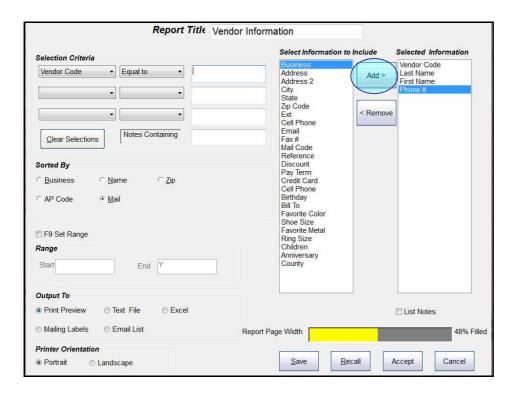
History- Lists all items ordered, dates, PO's, quantities and cost from the Vendor.
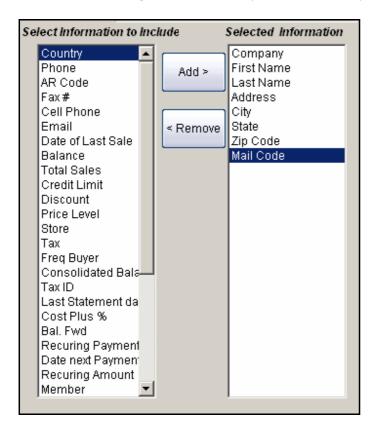
Custom List

Creates lists with the data you want as well as applying the data in the order you wish to view it. Custom lists represent information requested at a specific time. They should not be used to compare or calculate reports.
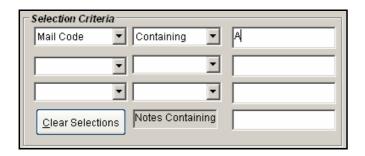
Select the **Custom List** button

F4 Vendor	F5 Vendor Code	F6 Last Name	First Name	Street Address	City	State	F8 Zip
CAP Bath Products and Such	CAP	Rodgers	Elizabeth	1234 Jazz Lane	Fort Worth	TX	76109
Clothing & More	CMORE	Weathers	Susan	988 Lubbock Ln.	New York	NY	11938
Convenience Products To Go	CPTG	Landon	Mary	5555 Test Lane	Fort Worth	TX	76132
Electronics & More	ELECT	Langdon	Tommy	5615 Corporate Blvd.	Baton Rouge	LA	70808
Furniture Discount Depot	FDDEPOT	Smith	Alice	901 Bellaire Dr.	Denver	CO	34567
Grocery Wholesale Supplies	GWS	McIntosh	Stewart	2245 Westway Dr.	Dallas	TX	22200
Hardware Supply Depot	HSUPPLYDE	Manning	Arnold	12243 Commerce St.	Dallas	TX	76653
Hi-Tech Toys Manufacturing	TOYS	Snell	Joe	One Tower Plaza	Pittsburg	PA	19004
Lone Star Pet Supplies	LSPET	Hunt	Daryl	4005 S. Mendenhall Rd., Suite 12	Memphis	TN	38115
OutBoard Marine	OMC	Smith	Sherry	2205 Woodale Drive	New York	NY	55555
Party Supplies, Etc.	PARTY	Smith	Mary	117 W. 36th Street	New York	NY	09795
Shoe Gala Wholesale	SHOEGALA	Gentry	Marilyn	23334 Parkway W.	Atlanta	GA	78234
Uniform Depot	UNIFORM	Whitmore	Tom	12 Bellington Dr.	Orlando	FL	89098

Search Criteria --Vendor

☐ F3 Use Wildcard Search   [   ]   Clear   ▲ ▼   Page Up / Page Down

Help   Custom List   Add New Vendor   View Detail F2   Exit

Select the order in which the information will be displayed by highlighting the option under the "Select Information to Include" box and then **Add**. This will move that option to the "Selected Information" box. Continue adding information until you have the data you want for the list.

Selection Criteria will narrow the list down and display only the vendors that have a specific criteria associated to them. Ex. A specific Mail Code

Select from the drop downs the data you would like to be displayed. In the below example we are looking for vendors with the Mail Code containing A.

Sorted By allows you to sort the list by the options below.

Set Range allows you to set a starting and ending range for the data. This is keyed off the option set in the Sorted By section.

Output To allows you to tell the system where you want your list to be sent – Print Preview (displays on your screen), Text File, Excel, etc.

Once you have defined all your selections press **Accept** to display your list.

Company: CAP Software   Store # 1

Vendor Information

Vendor Code	Business	First Name	Last Name	Address	City
ELECT	Electronics & More	Tommy	Langdon	5615 Corporate Blvd.	Baton Rouge
TOYS	Hi-Tech Toys Manufacturing	Joe	Snell	One Tower Plaza	Pittsburg
LSPET	Lone Star Pet Supplies	Daryl	Hunt	4005 S. Mendenhall Rd., Suite 12	Memphis
OMC	OutBoard Marine	Sherry	Smith	2205 Woodale Drive	New York
PARTY	Party Supplies, Etc.	Mary	Smith	117 W. 36th Street	New York

5 Records Listed

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Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time