



ADDING AN INVENTORY ITEM

“GETTING STARTED GUIDE”

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It is recommended to add your Vendors and Departments before you begin adding your inventory. Vendors are added from the CAP SellWise Pro tool bar by selecting the Vendor button. Departments are added in Configuration by selecting Help from the SellWise Pro tool bar, then Configuration, then Departments.

This will make adding your inventory a lot easier and faster because when you reach these fields you can select the appropriate vendor and department from the lists you already created.

Now that you have entered in your Vendors and Departments, you can start adding Inventory.

From the CAP SellWise tool bar, select Inventory.



From the Inventory Lookup screen, select **Add New Item**.

F4 Description	F5 SubDesc.	F6 s/L	F7 Item ID	UPC Code	F8 Dept	F9 Vendor	Quantity	Price
Component Cd Player 4x		1.	SNYCDX44	01234567890	071.000.000	ELECT	37	400.00
Monster Truck Conv Kitrc10		2.	L5030		065.000.000	TOYS	-72	115.00
Crepe Streamer Dk Blue		3.	S1810081		072.000.000	PARTY	94	11.00
Balloons		4.	B1814862		070.000.000	PARTY	72	1.97
Name Badges		5.	B1811588		068.000.000	PARTY	88	2.00
Ziggy Stickers		6.	Z1815417		068.000.000	PARTY	-23	1.75
Moorwood Deck Stain Blue	Blue	7.	D0793601		068.000.000	PARTY	-2.2021	24.74
Moorwood Deck Stain Brown	Brown	8.	D0795701		068.001.001	ABC	4	21.95
Star Sweater Red/blue		9.	514M		068.000.000	LSPET	0	1.00
Star Sweater Sil/blue		10.	515M		068.000.000	LSPET	-7	3.00
Rainbow Sweater Lt Blue Sz4		11.	523M		068.000.000	LSPET	5	7.69

From the Inventory Detail screen, select **Add**.

The screenshot shows the 'Inventory - 377 Records' window. At the top, there are fields for 'Stock Locator' (S.), 'Vendor Item #' (D0795701), 'Description' (Moorwood Deck Stain Brown), 'Sub-Description' (Brown), and 'Unit of Measure' (Ea - Each). Below these are three tabs: 'Main', 'Additional Information', and 'Messages'. The 'Main' tab is active and contains sections for 'Cost Price' (Current Cost: 13.00, Actual Cost: 13.75, List Price: 21.95; Margin: 40.77%, Markup: 68.85%), 'Ordering Information' (On Hand: 4, On Order: 1, Qty/Pack: 1, Re-Order: No; Maximum: 7, Minimum: 3, Has Sold: Yes, Last Sold: 08/17/2011), and 'Tax Code' (A 5.00%, Volumetric Tax \$: 0.00). The 'Additional Information' tab shows 'Vendor' (ABC), 'Alt. Vendor', and 'Department' (068.001.001 Retail - Hardware - Paint). A 'View Mix 'n Match Pricing' button is also present. At the bottom, there is a 'Notes' field and a row of buttons: F1 Help, Add, Change, Delete, History, F10 Accept, Print Tag, and Cancel Esc.

When entering the inventory information, you should select the TAB key on your keyboard to move to the next field.

The Stock Locator is the unique identifier for that record. The software will assign this number for you and it will start at 1 and increment from there.

Vendor Item # is the vendors part number which is used for ordering.

The next two fields are the **Description** of the item and the **Sub-Description** of the item, if there is one.

UPC is the (Universal Product Code) It is recommended you use a scanner to scan the UPC on the product into this field. This will eliminate keyboard entry errors.

There are 3 tabs in the Inventory file. **Main, Additional Information and Messages.**

This screenshot is identical to the one above, showing the 'Inventory - 377 Records' window with the 'Main' tab selected. It highlights the layout of the tabs and the data entered in the fields.

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Inventory - 377 Records

Stock Locator: S. Description: Moorwood Deck Stain Brown 18
 Vendor Item #: D0795701 Sub-Description: Brown
 UPC(s):

Unit of Measure: Ea - Each

Main		Additional Information		Messages	
Cost/Price					
Current Cost	13.00	Margin	40.77 %	Tax Code	A 5.00% Volumetric Tax \$ 0.00
Actual Cost	13.75	Markup	68.85 %	Vendor	ABC
List Price	21.95			Alt. Vendor	
Department: 068.001.001 Retail - Hardware - Paint					
Ordering Information					
On Hand	4	Maximum	7	View Mix 'n Match Pricing	
On Order	1	Minimum	3		
Qty / Pack	1	Has Sold	Yes		
Re-Order	No	Last Sold	08/17/2011		
Notes					

F1 Help Add Change Delete History F10 Accept Print Tag Cancel Esc

The **Main tab** (above) contains the following information.

Cost/Price

Current cost is the price you are paying for the item.

Actual Cost is an average cost which the system will calculate for you. When adding the item, the current cost and actual cost should be the same amount. It is used in reporting cost of goods sold.

The List Price is the retail price. This is the price you want to sell the item for to your customers.

Ordering Information

On Hand is the number of items you currently have in stock.

On Order is the number of items you currently have on order through the system. The field is calculated by the software. Do not input or change this number.

Qty/Pack is the quantity in pack of the product. This field is used for items that are ordered by the case and broken down to packs and singles. Ex. You order a case of drinks, the case item qty/pack would be 1. You also sell these drinks by the single. There are 24 singles in a case of drinks so the qty/pack of the single item would be 24. If you are using the Break Pack Link Manager to create your case/pack/single items, it will do this for you. Please see the Break Pack Link Manager doc for more details.

Re-Order is a Yes/No flag the software sets to tell you if the item Quantity is below the minimum level defined.

Maximum is the maximum quantity you want to have on hand for this item.

Minimum is the minimum quantity you want to have on hand for this item.

Min/Max is one way to do ordering through the software. When your On Hand drops below the min. level, the system can generate an order which suggests you order enough to get back to the max level you have defined.

Has Sold is a Yes/No flag that tells you if the item has Sold.

Last Sold is the date this item last sold.

Tax Codes will need to be set up in Configuration under Taxes. Once these are defined you can select from the drop down from the list of 5 different taxes or a Non-taxable option.

Volumetric Tax is a \$ amount tax that is in addition to the regular tax they are being charge. It is based on the size of the item.

Vendor is the primary company from which you purchase this product. If you have already created these in your Vendor file you can just select from the list you created.

Alternate Vendor is the secondary vendor you might use if the primary vendor is out of stock.

Departments can be broken down from Dept into Sub-Dept and Classes. Ex. Dept = Alcohol, Sub-Dept=Beer, Class=Import. Again, if you have set these up beforehand, you can then select from the dropdown. (see Department doc for more details)

The **Additional Information** tab (above) contains several flags that are normally set the first time you add the inventory item.

The following are Yes/No flags which tells the system if you want the item to do these functions or not.

Food Stamp – Is the item food stamp eligible?

Sell by Weight- Will you be weighing this item on a scale at the POS.

Discounts Allowed – Do you want this item to receive discounts at the POS?

Web Enabled – Will you be selling this item on the web through a linked shopping cart?

Non-Decrementing – When you sell this item, do you want the quantity to decrement? Ex. Services, fees, etc

FSA Eligible – this is for pharmacies. Is this item FSA eligible?

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Signature Required – Do you want the customer to sign for this item when they purchase it at the POS?

Commissionable – Do you want your employee to receive commission when they sell this item?

Age Verify – Do you want the POS to prompt the clerk at the POS to check the customer's ID and input it into the software when selling this item? In this field you will enter the age the customer needs to be to purchase this item. Ex "21" for alcohol.

Pricing Options

(see the GSG - Pricing Utilities doc for more details)

Price Levels – This is where you set up discounted prices based on the item and the customer. Ex. Wholesale pricing

Promo Pricing – This is where you set up discounted pricing based on a specified date range.

Quantity Pricing – This is where you set up discounted pricing when the customer purchases a specified quantity. Ex. 1 for \$.95, 3 for \$.89 each or 3 for \$2.65

Kit Item – Use a Kit to group items together when selling. Ex. A gift basket. When you sell the Kit item, it rings up the items you assigned to the kit.

Matrix – This is mostly used for apparel. It is a way to build items that are assigned a size/color/style. You can build both a 2 or 3 dimensional matrix. (see Matrix doc for more details)

Serialized Item – This is how you track serial numbers for the item when selling and receiving. Ex. Electronics

Mix n Match Code – This is how you group items together for quantity pricing.

Break Pack Link – This is used to set up case/pack/single items, when you are receiving by the case and selling by the case/pack/single. (see Break Pack Link doc for more details)

Item Link – This is how you link one item to another. Ex. Bottle deposit. Place the Stock Locator of the item you want link to this item in this field. When you sell this item, it will automatically sell the linked item with it.

Stock Link – This adjusts the quantity on hand of linked item. It is the reverse of the Break Pack Link. You receive by the single but sell by the single/pack/case.

Add/Remove Picture – This is where you can attach a picture to the item. If the picture is attached, it will appear on the POS screen when you ring up the item.

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The **Message** tab (below) contains the following information.

The screenshot shows a software window titled "Inventory - 377 Records". The main area is divided into three tabs: "Main", "Additional Information", and "Messages". The "Messages" tab is active, showing several sections:

- Extended Description - Invoices:** A text box containing the text: "A premium-quality waterborne alkyd/acrylic semi transparent stain formulated to penetrate and protect wood, resist abrasion, and beautify wood decking, siding, fencing, shingles and furniture. Its colors are semi transparent, allowing the color and the grain pattern of the wood to show through".
- Extended Description - Purchase Orders:** An empty text box.
- Up Sell Message:** A text box containing the text: "Remember to get the cleaner and sealer".
- Floor Location:** Two text boxes labeled "Front" and "Back", both empty.
- Store Reference:** A text box containing "D0793601".
- Volumetric Units:** A text box containing "0".
- Beverage Class:** An empty text box.

At the bottom of the window, there is a "Notes" section with an empty text box and three buttons: "F5 Edit", "F2 Find", and "F3 Next". Below the main interface is a toolbar with buttons: "F1 Help", "Add", "Change", "Delete", a left and right arrow, "History", "F10 Accept", "Print Tag", and "Cancel Esc".

Extended Description Invoice – This is where you put a longer description of the item that does not fit in the standard description or sub-description fields. This is best when used on invoices (8 ½ x 11in. paper) rather than a 40 column receipt.

Extended Description Purchase Order – This is where you put a longer description of the item to print on the Purchase Order. It can be used for special instructions to your vendor for this specific item.

Up Sell Message – This is where you enter a message that will appear to the clerk on the POS screen when they ring up this item. It is a way to prompt the clerk to remind the customer that another item would go along with the item they are purchasing. Ex. Do you want fries with that?

Floor Location – A 4 character reference field that can be used to specify where the product is located in the store.

Store Reference – For polling stores, it is a individual store field that will not be overwritten when polled

Volumetric Units – This is used for Texas wholesale liquor store reporting purpose (see TABC Report doc for more details)

Beverage Class - This is used for Texas wholesale liquor store reporting (see TABC Report doc for more details).

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Custom List

Create lists with the data you want and in the order in which you want it using Custom Lists.

Select the Custom List button

F4 Description	F5 SubDesc.	F6 S/L	F7 Item ID	UPC Code	F8 Dept	F9 Vendor	Quantity	Price
Component Cd Player 4x		1.	SNYCDX44	01234567890	071.000.000	ELECT	27	400.00
Monster Truck Conv Kitrc10		2.	L5030		065.000.000	TOYS	2	115.00
Crepe Streamer Dk Blue		3.	S1810081		072.000.000	PARTY	90	12.29
Balloons		4.	B1814862		070.000.000	PARTY	68	1.97
Name Badges		5.	B1811588		068.000.000	PARTY	79	10.00
Ziggy Stickers		6.	Z1815417		068.000.000	PARTY	-32	1.75
Moorwood Deck Stain Blue	Blue	7.	D0793601		068.000.000	PARTY	-2.2021	24.74
Moorwood Deck Stain Brown	Brown	8.	D0795701		068.001.000	ABC	-9	21.95
Star Sweater Red/blue		9.	514M		068.000.000	LSPET	-1	1.00
Star Sweater Sil/blue		10.	515M		068.000.000	LSPET	-7	3.00
Rainbow Sweater Lt Blue Sz4		11.	523M		068.000.000	LSPET	5	7.69

Search Criteria --SL

F3 Use Wildcard Search

Select the **User Defined** option and then Accept to create your Custom List. You can also run a **Value Analysis** report from here and get a list of **Deleted Items**.

User Defined

Value Analysis

Deleted Items

Report Title: Inventory Information

Selection Criteria

Qty on Hand | Greater than or | 1

Clear Selections | Notes Containing

Sorted By

Stock Locate Item ID Description

Sub-Descriptor

F9 Set Range

Range: Start 1. End 404.

Output To

Print Preview Text File Excel

Print Tags

Portrait Landscape

Report Page Width: 80% Filled

Buttons: Save, Recall, Accept, Cancel

Select Information to Include

- Sub Descrip
- Avg Cost
- Margin
- Markup
- Qty On Order
- Max
- Min
- Qty in Pack
- Mix'n Max Code
- Vendor Code
- Price Inc.Tax
- Re Order
- Has Sold
- Last Date Sold
- Serialized
- Tax Code
- Food Stamp
- Store Ref.
- UPC
- Loc. Front
- Loc. Back
- Kit
- Sell By Weight
- Break Pack Link

Selected Information

- S/L
- Item ID
- Description
- List Price
- Current Cost
- Qty on Hand

List Notes

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.

Select Information to Include

- Sub Descrip
- Avg Cost
- Margin
- Markup
- Qty On Order
- Max
- Min
- Qty in Pack
- Mix'n Max Code
- Vendor Code
- Price Inc.Tax
- Re Order
- Has Sold
- Last Date Sold
- Serialized
- Tax Code
- Food Stamp
- Store Ref.
- UPC
- Loc. Front
- Loc. Back
- Kit
- Sell By Weight
- Break Pack Link

Selected Information

- S/L
- Item ID
- Description
- List Price
- Current Cost
- Qty on Hand

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Selection Criteria will narrow the list down and display only the item that have a specific criteria associated to them. Ex. A specific Quantity on Hand
 Select from the drop downs the data you would like to be displayed. In the below example we are looking for items with a Quantity on Hand of greater than or equal to “1”

Sort 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.

Inventory Information

S/L	Item ID	Description	List Price	Current Cost	Qty on Hand
1.	SNYCDX44	Component Cd Player 4x	400.00	241.85	27.00
2.	L5030	Monster Truck Conv Kit.rc10	115.00	15.00	2.00
3.	S1810081	Crepe Streamer Dk Blue	12.29	0.95	90.00
4.	B1814862	Balloons	1.97	0.81	88.00
5.	B1811588	Name Badges	10.00	2.31	79.00
11.	523M	Rainbow Sweater Lt Blue Sz4	7.69	3.33	5.00
12.	528M	Rainbow Sweater Pink Sz 6	7.69	3.33	1.00
19.	17-121	Leather Jacket	138.50	50.00	1.00
31.	Remark	Line Remark	0.00	0.00	3.00

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Value Analysis

Select Custom List then Value Analysis. Value Analysis will show you the number of records, number of items and the value of your inventory at that time. These numbers will change each time you sell, receive or return items so be sure to run this report at the end of the last day of your fiscal year for tax reporting purposes.

Select Date 10/26/2011

Vendor Only available from Reports

Dept Option only available in Reports

S/L Range 1. to 404.

The system will automatically run this at the end of every month and you can select from the “Select Date” drop down. This can also be run in the Report module which will give you more options like selecting a Vendor or Department.

The Range will default to all items but you can narrow that down to a specific range of Stock Locaters. Press Accept to run the report.

Inventory Records in Analysis	402
Total Number of Items	10523.
Retail Value	135,503.30
Net Value (Using last cost)	88,294.20
True Value (Using actual cost)	87,808.20

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