



ADDING A NAME IN CAP SELLWISE PRO

“GETTING STARTED GUIDE”

© Chuck Atkinson, Inc.

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time



From the CAP Sellwise Pro tool bar, select **Names**.

F7 Company	F6 AR Code	F4 Last Name	First Name	Street Address	City	State	F8 Zip	F9 MC
Cowtown Driving School	2463733	Man	Dan	1634 S. Cherry Ln	Ft. Worth	TX	76119	E
Crafts Etc.	7323278	Smitley	Joe	1516 Hwy 80 W.	Fort Worth	TX	76116	S
Dutch M. Sports	666777777	Baugh	Sam	1 Stadium Dr	Fort Worth	TX	76111	
Executive Marketing	7327186	Schlak	Mark	5120 Ridgmar Blvd	Ft. Worth	TX	76116	Y
Go Frogs Moving Co.	8179245555	Lilly	B.	123 TCU Blvd.	Fort Worth	TX	76109	
HATS R US	4445555	Hat	Top					
Hobby House	2658101	Pruitt	Brent	104-B W Pioneer Pkwy	Arlington	TX	76136	S
International Widget Machines	1111212	Doe	John	107 N. Main	Kalamazoo	WI	01765	F
Joe's Garage	3354921	Martinez	Pedro	131 E. Henderson	Ft. Worth	TX	76102	Y
Joe's Tang Soo Do Academy	7378103	Smith	Joe	9231 S. Main	Ft. Worth	TX	76132	Y
L. Tomlinson Trains	888558888	Tomlinson	L.	5 University Dr	Fort Worth	TX	76110	

Search Criteria --Business
 F3 Use Wildcard Search
 F12 Clear Add New Name Pg Up Pg Dn View Details F2 Esc Cancel
 F1 Help Custom List

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

Names - 40 Records

Company: Dutch M. Sports A/R Code: 666777777 Customer Since: 07/02/2010

Title: Sam First Name: Sam Last Name: Baugh

Contact Information **Sales and Pricing** **Shipping Address**

Address: 1 Stadium Dr Phone: 817-555-1111 Ext: 1234
 Address 2: Ste. A Cell Phone: 817-555-9988
 City: Fort Worth State: TX Fax #: 817-555-2121
 Zip Code: 76111 Country: Mail Code: FF Email: Sbaugh1@dms.com F9 Find EMail
 Addl. Info: Bday: 03/17/1914 F6 Search Additional Info

Notes

F5 Edit F2 Find F3 Next
 F1 Help Add Change Delete E-Mail Mailing Label Write Letter F7 ROA Esc Cancel

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time

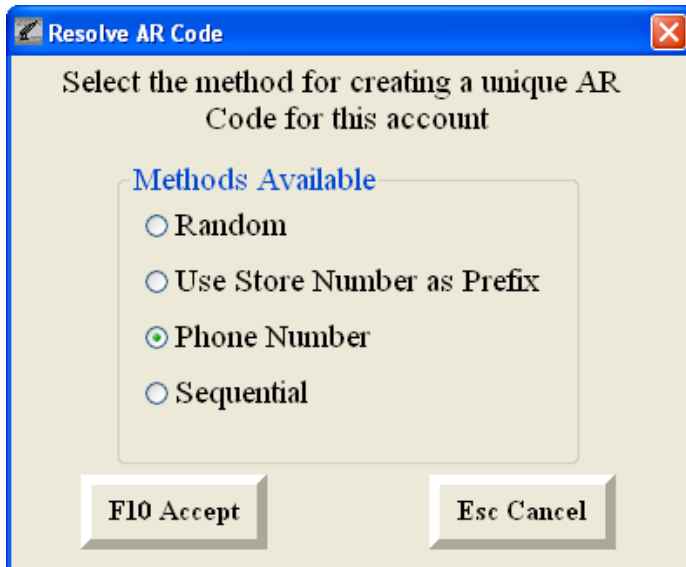
When entering the name information, you should select the TAB key on your keyboard to move to the next field.

After you select the Add option, you will be asked “Do you have a Phone #?” You will need to select either Yes or No.



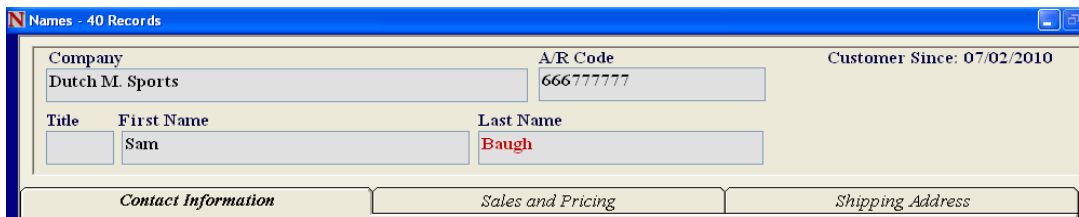
If you select “Yes”, you will be prompted to enter the persons phone number ex. 817-555-1234. This will add this same number to the A/R Code field in the names field. The A/R (Accounts Receivable) Code field is the unique identifier for the Name record. No two names can have the same A/R Code. This field can not be left blank.

If you select “No”, a box will pop up asking you to select the method for creating a unique A/R Code for this account.



Select one of these options. Then continue adding the rest of the customer information and selecting TAB to go to the next field.

There are 3 tabs in the names file. **Contact Information, Sales and Pricing and Shipping Address.**



Most of these fields should be self explanatory.

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time

Below is a list of the fields that may not be self explanatory.

Zip Code	76111	Country		Mail Code	A
Addr. Info.	Bday	03/17/1914			

Mail Code – This field is 2 characters long and can be used to group like customers for things like mailings. This field is also used to identify names for Payroll Deduction and Fintech. (See appropriate doc for more information)

Additional Information – The Additional Information types will need to be create in Configuration before you define them in the Names record. Ex. Birthday, expiration date, alternate contact #, etc. Once these are defined in Configuration, you can enter the customer’s birthday, for example.

You can go to the next tab by either selecting that tab (Contact Information, Sales and Pricing, Shipping Address) with the mouse or by selecting the TAB key on your keyboard while in the Add or Change mode and tabbing through all the fields.

The screenshot shows a software window titled "Names - 40 Records". The main content area is divided into three tabs: "Contact Information", "Sales and Pricing", and "Shipping Address".

- Company:** Go Frogs Moving Co. (A/R Code: 8179245555, Customer Since: 07/30/2010)
- Title:** B. (First Name), Lilly (Last Name)
- Contact Information:** Date of Last Sale: 9/20/2011, Total Sales: 413.50, Tax Code: A 5.00%, TaxID: [empty]. Includes a "View Sales History" button.
- Sales and Pricing:** Accounts Receivable: Credit Limit: .00, Payment Terms: Net 30, Last Statement Date: [empty], Balance: 442.62, Minimum Payment: [empty]%. Includes "Account History" and "Layaway" buttons.
- Shipping Address:** Special Pricing Options: Price Level: [empty], Price Level Expires: [empty], Discount: 0%, Sell at Cost Plus: [empty]%, Frequent Buyer: No.
- Recurring Payments:** Charge Description: DOLLARBILL, Amount: 2.11, Date next Charge: 6/24/2011, Frequency: Monthly, Charge C. Card: No.
- Club/Association:** Member: No.
- Notes:** A text area with "F5 Edit", "F2 Find", and "F3 Next" buttons.
- Bottom Bar:** F1 Help, Add, Change, Delete, navigation arrows, E-Mail, Mailing Label, Write Letter, F7 ROA, Esc Cancel.

The **Sales and Pricing** tab (above) contains the following.

Sales

Date of Last Sale – The date this customer last purchased something.

Total Sales – The total \$ amount purchased by this customer.

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time

View Sales History – Shows the history of purchases for this customer.

Date	Description	Qty	Price	Total	Invoice	SL	Item ID	Sub Description
9/16/2011	CAMO BDU SHIRT	1	40.00	40.00	83	306.	295-211	SUMMER.SMALL.DES
9/16/2011	Frequent Buyer Reward	2	-20.00	-40.00	83	.	295-211	SUMMER.SMALL.DES
9/16/2011	32 Lcd Tv	1	413.50	413.50	82	53.	53	
	Serial #326587							
9/16/2011	Frequent Buyer Reward	2	-20.00	-40.00	82	.	53	
9/16/2011	25% Barley	1	11.00	11.00	81	90.	90	
Sep	Total			384.50				
2011	Total			384.50				
Grand	Total			384.50				

Tax Information

Tax Code – This is the specific tax rate for this customer. Choose from Item Tax, Non-Taxed or from the 5 other tax rates you defined in Configuration (A-E).

TaxID – This is where you enter the Tax Identification # of the customer if they are non-taxable

Club/Association – Set to Yes if you want this name to be a Member. The different Types will need to be defined in Configuration under Membership Types. It also displays the date the person became a Member and you can select a Expiration date for their membership. This also works with Recurring Payments where you can define the amount of their membership payment and the frequency of the payment.

Club/Association		Recurring Payments	
Member	Yes	Charge Description	Monthly 50\$
Type	Yearly	Amount	19.95
Since	10/26/2011	Date next Charge	10/26/2011
Expires	10/31/2012	Frequency	Monthly
		Charge C. Card	Yes

Accounts Receivable

Credit Limit – If you would like to set a limit on the amount of credit this customer can have, enter that amount in this field. There is also a Configuration setting in Store Settings “Credit Limit Active” that has to be set to Yes.

Payment Terms – The condition of paying for an on account sale that you allow this customer. Select from the drop down.

Last Statement Date – The date of the last statement that was sent.

Balance – The current amount this customer owes you.

Account History is the history of charges and payments to an account. You can double click the options in blue to get details. You can also a statement for the record by selecting the Print Statement button.

Date	Invoice	Charges	Payment Type	Payments	Balance
10/18/2011		116	2086.68	Paid # 0000125	2086.68
10/21/2011		125		Paid on 0000116 by CHECK	-2086.68
10/21/2011		126	413.50	Paid # 0000127	413.50
10/21/2011		127		Paid on 0000126 by CHECK	-413.50
10/21/2011		128	329.70		329.70
	Totals		2829.88		-2500.18

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time

Special Pricing Options

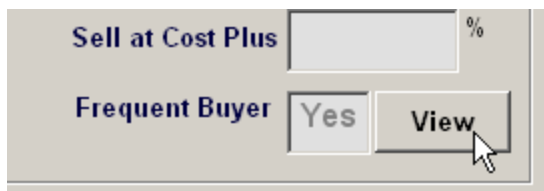
Price Level is where you set up discounted prices based on the item and the customer. Ex. Wholesale pricing. Assign the Price Level code for this customer to get the special pricing you have defined in inventory.

Price Level Expires - enter a date you would like the Price Level to expire. This is optional.

Discount is a percentage discount for this customer. The discount will automatically be applied to the sales to this customer.

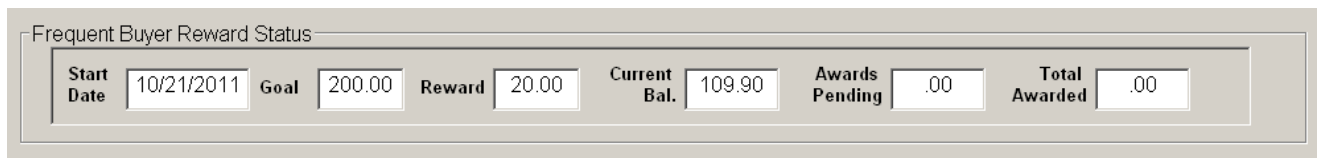
Sell at Cost Plus – enter the percentage above cost you would like this customer to purchase items.

Frequent Buyer is a customer loyalty feature. It rewards a customer with a discount when they reach their goal. This is set up in Configuration – Store Settings – Cash Drop/Layaway/Frequent Buyer. Select View to see the details of Frequent Buyer for this customer.



Screenshot of the 'Sell at Cost Plus' and 'Frequent Buyer' settings. The 'Sell at Cost Plus' field is empty with a '%' symbol. The 'Frequent Buyer' field is set to 'Yes' and has a 'View' button next to it.

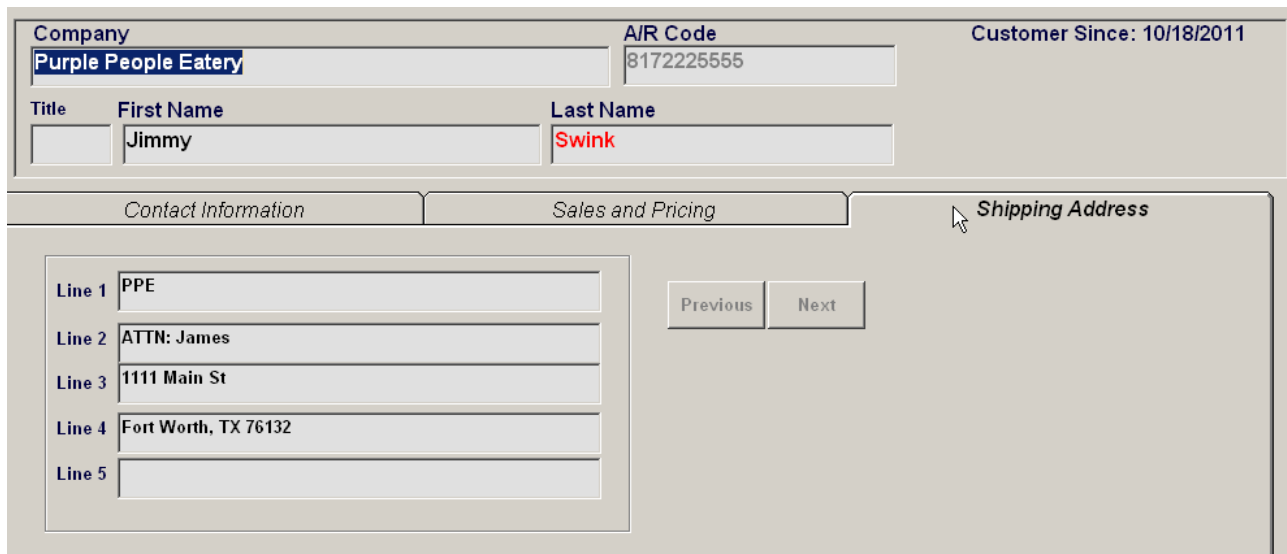
The details, below, will show you the Start Date, Goal, Reward, Current Balance, Awards Pending and Total Awards received. The details will also print on the customer receipt.



Frequent Buyer Reward Status

Start Date	10/21/2011	Goal	200.00	Reward	20.00	Current Bal.	109.90	Awards Pending	.00	Total Awarded	.00
------------	------------	------	--------	--------	-------	--------------	--------	----------------	-----	---------------	-----

Shipping Address – Select the Shipping Address Tab to enter an alternate shipping address for the customer's record. You can have more than one alternate address and can use the Previous and Next buttons to scroll through them.



Company: Purple People Eatery, A/R Code: 8172225555, Customer Since: 10/18/2011

Title: (empty), First Name: Jimmy, Last Name: Swink

Contact Information | Sales and Pricing | Shipping Address

Line 1: PPE
Line 2: ATTN: James
Line 3: 1111 Main St
Line 4: Fort Worth, TX 76132
Line 5: (empty)

Previous | Next

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

F7 Company	F6 AR Code	F4 Last Name	F5 First Name	Street Address	City	State	F8 Zip	F9 MC
Squaw Creek Feed Store	2376864	Crambdon	Jed	1248 Squaw Creek Rd	Fort Worth	TX	76136	E
The Flower Shop	2462374	Lenox	Sharon	8011 University Dr.	Ft. Worth	TX	76119	E
Cowtown Driving School	2463733	Man	Dan	1634 S. Cherry Ln	Ft. Worth	TX	76119	E
S-Ventures	2491990	Herring	Bill	2108 E. Richmond	Dallas	TX	76709	Y
Hobby House	2658101	Pruitt	Brent	104-B W Pioneer Pkwy	Arlington	TX	76136	S
Joe's Garage	3354921	Martinez	Pedro	131 E. Henderson	Ft. Worth	TX	76102	Y
Bakery, The	3462223	Hill	Linda	1000 Hulen Street	Ft. Worth	TX	76133	Y
Quality Trailer Products	4444518	Smiley	Jim	1233 WestSide Pkwy	Azle	TX	76136	S
HATS R US	4445555	Hat	Top					
Rocky's Pest Control	4784122	Gardner	Rocky	6826 Briggs St.	Fort Worth	TX	76109	S
Signs Unlimited	5248798	Smith	Aaron	Archer Road	St. Louis	KS	99834	Y

Search Criteria --AR Code
 F3 Use Wildcard Search

Select the **User Defined** option and then Accept to create your custom list. You can also select the **Deleted Name** option to see a list of Names that have been deleted/hidden in the Name lookup screen. They can be undeleted from here as well.

User Defined
 Deleted Names

Report Title: Customer Information

Selection Criteria

Mail Code: Containing: A

Clear Selections Notes Containing:

Sorted By

Business Name Zip

ARcode Mail

F9 Set Range

Range: Start: End: yellow cab

Output To

Print Preview Text File Excel

Mailing Labels E Mail List Payroll Format

Portrait Landscape

Report Page Width: 88% Filled

Buttons: Save, Recall, Accept, Cancel

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

Country (highlighted)

Buttons: Add >, < Remove

Selected Information

Company

First Name

Last Name

Address

City

State

Zip Code

Mail Code (highlighted)

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time

Selection Criteria will narrow the list down and display only the names 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 names with the Mail Code containing A

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.

Customer Information

Company	First Name	Last Name	Address	City	State	Zip Code	M/C
Scotts Liquor Barn							A
Dutch M. Sports	Sam	Baugh	1 Stadium Dr	Fort Worth	TX	76111	A
BIZ	HARRY	Potter	1234 MyHouse Rd	Fort Worth	TX	76133	A
Purple People Eatery	Jimmy	Swink	1 University Dr	Fort Worth	TX	76109	A
Horny Toad Bar & Grill	Dave	O'Brien	1 Stadium Ave	Fort Worth	TX	76109	A
Go Frogs Moving Co.	B.	Lilly	123 TCU Blvd.	Fort Worth	TX	76109	A
L. Tomlinson Trains	L.	Tomlinson	5 University Dr	Fort Worth	TX	76110	A
abc co	Jack	D	123 main st	dallas	TX	75218	A

8 Records Listed

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com

Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:30am-5:30pm Central Time