



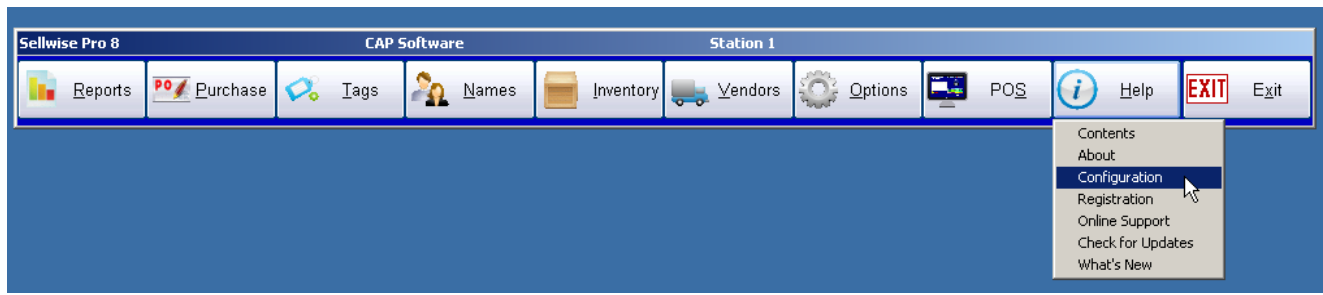
CONFIGURATION

“GETTING STARTED GUIDE”

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

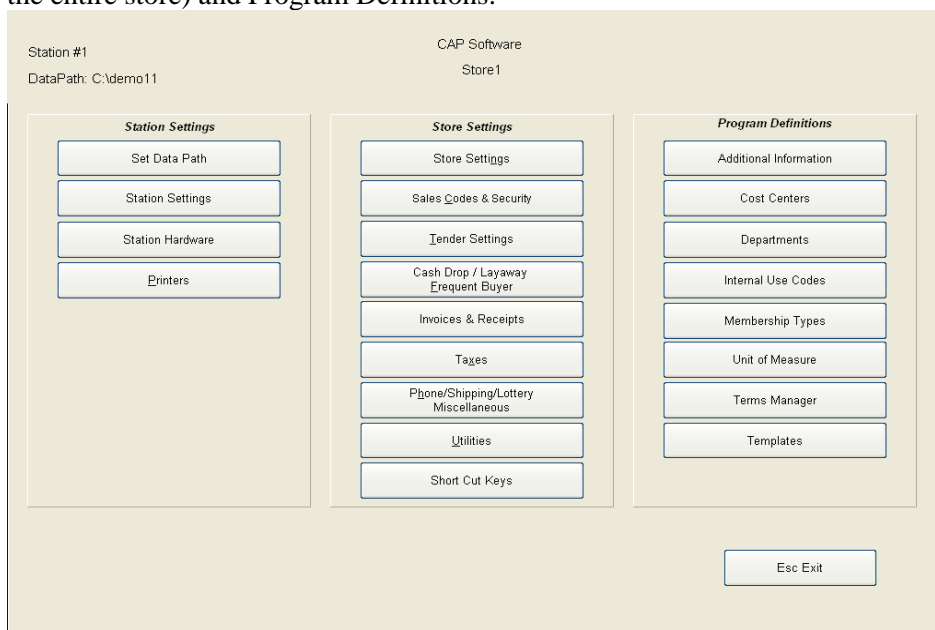
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Configuration can be reached by either selecting Help then Configuration from the SellWise Pro 8 toolbar or from POS by selecting Operation then Configuration. You do have to Exit the program before any changes you make in Configuration will take effect.

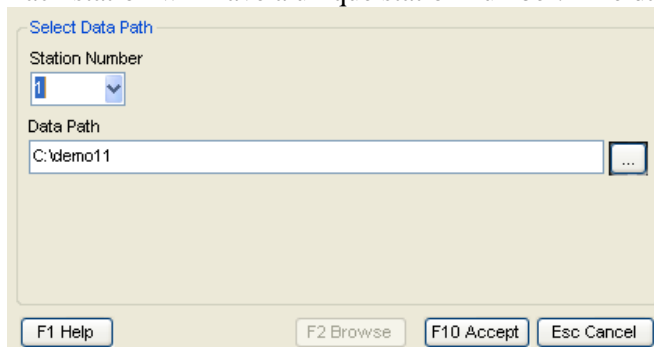
Configuration allows you to tailor the software to closely match your business. As you go through all of the setting you will see the flexibility the software offers.

At the top of the screen you will see your station #, data path and store #. It is broken down into 3 categories – Stations Settings (makes changes to the station you are on), Store Settings (make changes to the entire store) and Program Definitions.



Set Data Path is a way to verify or change the station # and data path. The data path (usually C:\SW or F:\SW on a network with F being the mapped drive letter) is where the data for CAP is located.

Each station will have a unique station number. The data usually resides on station 1.



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Station Settings are for things associated with this particular station.

CAP Configuration - Station Settings	
POS Display Options	
Select POS Display Screen	Quick Keys
Select Quick Key Set	01 woohoo
Show Special Keys on Main Screen as	Special Keys
Default POS Lookup: Inventory List	Description
Default POS Lookup: Name List	Business
Use Larger keypad for POS Lookup Lists	No
Select Display for Name Detail: Limited(faster) or All Details.	Limited
Select Display for Inventory Detail: Limited(faster) or All Details.	Limited
Show Keyboard on POS Name and Item Lookups	Yes
Display Department List when Open Department Selected	Yes
Display Item Cost on Inventory Lookup	No
Select Style for POS	Classic
Custom Colors for POS	0
Show on account sales on POS Cash Drawer Report	Yes
When Name Selected Show Date of Last Sale	No
POS Functions	
Jump to Names Screen First at Point of Sale	No
Clear Sales Code after each sale	No
Warning if Item is not in stock at Point of Sale	No
Pause for 'Change Due' notice before next invoice	Yes
Hide Item Prices on Quotes	No
Hand enter quantity for each item at POS main screen	No
Use Item Quantity button as ON/OFF switch	No
Prompt for quantity when using Hot Keys	No
Use Pick List in Warehouse	No

F1 Help F10 Accept Esc Cancel

POS Display Options

Select POS Display Screen – choose from 4 different options on how you want your POS screen to look, Multi Touch, Quick Keys, Hot Keys or Normal (see ex. of these screen in the POS GSG)

Select Quick Key Set – Select the Quick Key set for this station. You can have different Quick Keys at different stations.

Show Special Keys on Main Screen – Define which Special Keys you want to display on the POS screen – None, Discounts, Coupons or Special Keys (break pack link)

Default POS Lookup: Inventory List – When searching Inventory from the POS, which field do you want to be the default – Description, Stock Locator, Item ID, UPC

Default POS Lookup: Name List – When searching Names from POS, which field do you want to be the default – Last Name, Business, AR Code, Phone

Use larger keypad for POS Lookup Lists –

Select Display for Name Detail: Limited (faster) or All Details – Select how much detail you want to display when looking up a name from the POS. Selecting limited will make the lookup faster

Select Display for Inventory Detail: Limited (faster) or All Details - Select how much detail you want to display when looking up an item from the POS. Selecting limited will make the lookup faster

Show keyboard on POS Name and Item Lookup – Do you want a keyboard to display on your screen when looking up either names or items from the POS?

Display Department lists when Open Dept Selected – Do you want the list of your departments to automatically show up when you select Open Dept?

Display Item Cost on Inventory Lookup – Do you want the cost of your items to show up, when looking up items from the POS?

Select Style from POS – Select from 3 options – Classic, Contemporary or Custom Color

Custom Color for POS –

Show on account sales on POS Cash Drawer Report – Do you want your On Account sales to appear on your POS Cash Drawer Report?

When Name Selected Show Date of Last Sale -

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CAP Configuration - Station Settings	
Display Department List when Open Department Selected	No
Display Item Cost on Inventory Lookup	No
Select Style for POS	Classic
Custom Colors for POS	0
Show on account sales on POS Cash Drawer Report	Yes
When Name Selected Show Date of Last Sale	No
POS Functions	
Jump to Names Screen First at Point of Sale	Yes
Clear Sales Code after each sale	No
Warning if Item is not in stock at Point of Sale	No
Pause for 'Change Due' notice before next invoice	Yes
Hide Item Prices on Quotes	No
Hand enter quantity for each item at POS main screen	No
Use Item Quantity button as ON/OFF switch	No
Prompt for quantity when using Hot Keys	No
Use PickList in Warehouse	No
Enable Local Mode (Allows Sales to be made when Network is down)	No
Show Temporary Reports when in Local Mode	No
Other	
MPS Server Name	
Cost Center	
Turn Cap Backup On	No
CAP DVR Server IP	
CAP DVR Server Port	
Turn CAP DVR On	No

F1 Help
F10 Accept
Esc Cancel

POS Functions

Jump to Names Screen at Point of Sale – Do you want each sale to start at the name look screen? This is used when retailers want to track every person making a purchase.

Clear Sales Code after each sale – Do you want to reset the sales code after each transaction? This will require the clerk to log in for every transaction

Warning if Item is not in stock at POS – This will display a message at the POS when an item on the sale is at or below zero for the quantity on hand. Most useful in a mail order type of business when the item is not present.

Pause for “Change Due” notice before next invoice – This will display a Change Due message on the POS screen for the clerk until they press the ESC key.

Hide Item Prices on Quotes – This will not display the prices of the individual item, just the total on a quote.

Hand enter quantity for each item at POS main screen – The Quantity box will pop up after you each item is added to the sale.

Use Item Quantity button as On/Off switch – Allows the Quantity button to act as a toggle switch to “Hand enter quantity for each item at POS Screen” setting

Prompt for quantity when using Hot Keys –

Use Pick List in Warehouse –

Enable Local Mode – Allows sales to be made when network is down

Show temporary reports when in Local Mode –

Other

MPS Server name –

Cost Center –

Turn CAP Backup on –

CAP DVR Server IP –

CAP DVR Server Port –

Turn CAP DVR on -

Station Hardware setting need to be defined for each station

	Drawer #1	Drawer #2
Cash Drawer	Yes	No
Drawer on Printer	No	No
If Yes then Printer	TM-T20U OPOS	TM-T20U OPOS
If No then Drawer Port	COM1:	COM1:
Use Legacy Settings for Cash Drawer on Comm Port	No	
Sales Code		
Customer Display	No	
Display Port	COM2:	
Display Brand	Par	
Display Message		
Cash Drawer Pulse		4
Baud Rate COM1		9600
Baud Rate COM2		9600
Baud Rate COM3		9600
Baud Rate COM4		9600
Scale Port	COM1:	
Com Port for Inventory Checker	No	
Customer LCD Display	No	
Advertisement File		

Cash Drawer – Is there a Cash Drawer on this station? You can have up to two cash drawers on each station.

Drawer on Printer – Is the cash drawer connected to and opened by a receipt printer?

If Yes, then Printer – Specify the printer the cash drawer is connected to

If No, the Drawer Port – Specify the port the cash drawer is connected to

Use Legacy Settings for Cash Drawer on Comm Port –

Sales Code – Assign the sales code to open the cash drawer

Customer Display – Is there a customer pole display which show the sale items, total and change due for the customer?

Display Port – Specify the port the customer display port is connected to

Display Brand – Select the brand of the customer pole display

Display Message – You can enter a message to scroll on the customer pole display when not active (Must be OPOS compatible)

Cash Drawer Pulse – This is for cash drawers attached to a comm port. This is the number of pulses sent by the comm. Port to open the cash drawer.

Baud Rate Com1 – Com4 – The serial port Baud rate must correspond to the device that is attached.

Scale Port – Assign the port if a scale is attached (for weighing items)

Com Port for Inventory Checker – Assign the port the portable data collector is attached to

Customer LCD Display – Is there a secondary display attached for presenting information to the customer during check out at the POS

Advertisement File – Location of the file for advertising at the POS

Printers assign the printer jobs to the appropriate printer by selecting from the drop down of the printers you have added to the system.

CAP Configuration - Printer Assignments

Cash Sales Receipt	TM-T20U OPOS
Charge Sales Receipt	TM-T20U OPOS
Payment Received On Account Receipt	TM-T20U OPOS
Second Copy of Receipt	Not Assigned
Third Copy of Receipt	Not Assigned
EDC Copy of Receipt	TM-T20U OPOS
Layaway Receipt	TM-T20U OPOS
Quotes and Packing Lists	HP DeskJet 850C
Work Order	HP DeskJet 850C
Lists (Names, Inventory, Vendors)	HP DeskJet 850C
Reports (WinReports)	HP DeskJet 850C
Purchase Orders and Receiving Reports (Buywise)	HP DeskJet 850C
Graphs (WinReports)	HP DeskJet 850C
Tags and Labels (TagWise)	HP DeskJet 850C
History Lists (Names, Inventory, Vendors)	HP DeskJet 850C
Customer Balance Reports (Names)	HP DeskJet 850C
Event Ticket Printer	HP DeskJet 850C
Pick List Printer	Not Assigned
Packing List Printer	Not Assigned
Switch Printer at Tender Screen to	HP DeskJet 850C

F1 Help **F5 Configure Printers** **F10 Accept** **Esc Cancel**

Configure Printer

Select Printer

(0) TM-T20U OPOS
(1) \\SHIPPING1\Brother HL-4070CDW series
 (2) HP DeskJet 850C

Details

Printer Type	\\SHIPPING1\Brother HL-4070
Form Width	80 Characters
Form Length	11 Inch
Line Feeds	0
Invoice Type	G - Graphic Invoice
Statement Type	P - Plain
Receipt Printers only	
Validate Checks with Slip Printer?	No
Additional Endorsement Text when printing Validation	
Print other information with Slip Printer	No

Select Printer to Add

F1 Help **F6 Add Printer** **F8 Delete Printer** **F7 Legacy Printer** **F10 Accept** **Esc Cancel**

If you have an OPOS receipt printer installed, it will display as printer (0). If you would like to add more printers, select F6 Add Printer button. This will the list of printers you have installed in Windows. Select the Printer you want to add to CAP. This will add it to the Select Printer list. Now select the printer from the Select Printer list and set the Details. Form Width (40 is for receipt printers and 80 is for report/invoice printers) Form Length (roll is for receipt printers and 11 inch is for report/invoice printers) Line Feeds is the number of line feeds when a receipt prints. Invoice Type can be set to Graphics Forms (recommended, generates nicer looking invoices with forms, detail and company logo on plain paper) other options are Plain, CAP Forms, Color (a custom invoice for a specific customer and form)

Statement Type –

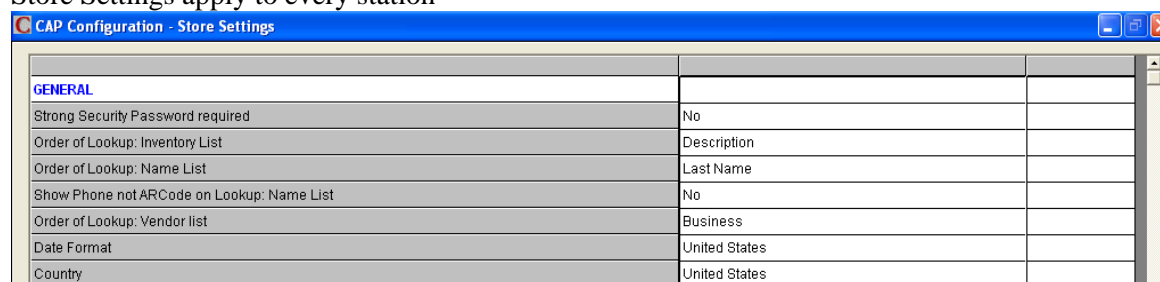
Vaildate Checks with Slip Printer –

Additional Endorsement Text when printing Validation on checks

Print other information with Slip Printer -

Legacy Printers – This is a way to add printers that Windows does not recognize. Usually these are older printers that are not OPOS compatible (CAP recommends you replace these older printers with new thermal OPOS compatible printers which will print faster, quieter and deliver better customer service.

Store Settings apply to every station



Setting Name	Value	
Strong Security Password required	No	
Order of Lookup: Inventory List	Description	
Order of Lookup: Name List	Last Name	
Show Phone not ARCode on Lookup: Name List	No	
Order of Lookup: Vendor list	Business	
Date Format	United States	
Country	United States	

General

Strong Security Password Required A strong security password requires 7 or more characters and must contain both letters and numbers. This is required for retailers who are processing credit cards in the system (EDC – Electronic Draft Capture) Passwords should be created by the employee.

Order of Lookup: Inventory List – When looking up inventory in SellWise Pro, this is the default way the system will search. Select from Description, Stock Locator, Item ID or UPC

Order of Lookup: Names List - When looking up a name in SellWise Pro, this is the default way the system will search. Select from Last Name, Business, AR Code or Phone

Show Phone not AR Code on Lookup: Name List – This will display the customers phone # instead of their ARCode in the Names lookup screen

Order of Lookup: Vendor List - When looking up a Vendor in SellWise Pro, this is the default way the system will search. Select from Business, Last Name or Vendor Code

Date Format – Select between United States (04/30/1999) or European (30/04/1999)

Country – Select from one of the countries listed depending on where the store is located

POS

Mandatory Name Selection when selling – This requires the clerk to assign a name to the transaction

Credit Limit Active – Setting this to Yes will pop up a warning message at the POS if their balance exceeds the Credit Limit set in the Names file

Sell by Order (for POS or Purchasing) – set the order the system will search at the POS and when ordering

Price Method –

Allow Discounts on Mix ‘n Match, Quantity and Promo Prices – If set to Yes, it will allow additional discounts on top of the discount the item already receives from these options

Warn if Sale drops below cost – When a discount drops the selling price of an item below the item’s cost, a warning message will display at the POS

Allow Price Levels to Exceed Current Retail Price – If set to Yes, then the Price Level defined for the customer can be more than the retail price set in inventory

Discount Button 1through 4 – The left column is the button label and the right column is the discount % given. These will display in the POS Exceptions screen. **The 5th button** can be configured to an additional % discount rate or a Cost Plus discount.

Suspend sale after printing Pick List – This will suspend the sale after you print a Pick List and it will also reduce the quantity on hand in inventory

CAP Configuration - Store Settings		
POS		
Mandatory Name Selection When Selling	No	
Credit Limit Active	Yes	
Sell by Order(for 'Point of Sale' or Purchasing)	Item ID ,Stock Locator,UPC	
Price Method	Best Price	
Allow Discounts on Mix 'n Match, Quantity and PromoPrices	No	
Warn if Sale drops below cost	No	
Allow Price Level to Exceed Current Retail Price	Yes	
Discount Button 1 - Button Caption(max length 10) Discount%	10% Discount	10%
Discount Button 2 - Button Caption(max length 10) Discount%	15% Discount	15%
Discount Button 3 - Button Caption(max length 10) Discount%	20% Discount	20%
Discount Button 4 - Button Caption(max length 10) Discount%	25% Discount	25%
Discount Button 5 - Button Caption(max length 10) Discount%	Cost Plus	25%
Suspend sale after printing PickList (Inventory Reserved)	Yes	
Verify Age Method	Enter DOB or Read Drivers License Mag Stripe	
Display security message at POS start up	Yes	
Security Message	..	
Show Cash sales totals on Cash Drawer Blind Count Report	No	
Show Sub Description on Grid when Selling	Yes	
Prompt for Price when Price \$0.00 in Hot Keys	Yes	
Allow Voiding of a Previous Day's Receipt	Yes	
Allow Serial Numbers to be Added in POS	Yes	
Enter Serial # when product added to sale	No	
Allow Auto Fill of Serial Numbers when Selling	Yes	
Add tracking for returned Items	No	
Months of History to Show for Inventory		48
Months of History to Show for Names		12
Show Customer Balance on Main Screen	Yes	
Do not print from POS when Price is '0.00' in Department:		
Ask if to Change Sales Code for all Items on Sale	Yes	

Verify Age Method – Select how you want the system to ask the clerk to verify the customers age when selling items that have been designated as age verification required. The options are None, Enter DOB (date of birth) or Read Drivers License from swiping using a Mag stripe reader. Items can be designated as age verification in Department settings or at the Item level in Inventory.

Display security message at POS start up – If set to Yes, then it will display the text you have in the “Security Message” option when the POS is started.

Security Message – Enter the text you would like to display when the POS starts up

Show Cash sales totals on Cash Drawer Blind Count Report –

Show Sub Description on Grid when selling – If set to Yes, it will display the Sub Desc of the item along with the Desc on the POS screen

Prompt for Price when Price is \$0.00 in Hot Keys – If there is not a price on the item that is attached to a Hot Key, it will prompt you to enter the Price when selling this item in Hot Keys

Allow Voiding of a Previous Days Receipt

Allow serial numbers to be added in POS – This allows the clerk to enter a serial number in the POS if there is not one available

Enter serial # when product added to sale –

Allow auto fill of serial #'s when selling – When selling multiples of a serialized item, this allows you to select the first serial # in the list and it will select the others in order for you

Add tracking for returned items –

Months of History to show for inventory – This is the default months of history the system will show

Months of History to show for names – This is the default months of history the system will show

Show Customer Balance on Main Screen – When selecting a Name in the POS, this will show their current balance

Do not print from POS when Price is \$0.00 in Department –

Ask if to Change sales codes for all items on Sale – If you change the sales code on one item from Exceptions, it will ask if you want to change all items on the sale to this sales code

NAMES		
Default A/R Code	Phone #	
Use Template for Name's Notes	Yes	
Show Consolidated Account Balance in Names	No	
Verify Balance before Displaying Record in Names	Yes	
Verify Consolidated Sales on name before Displaying Record	No	
Allow Receive on Account Through Names Screen	Yes	
Show Serial Numbers on Names Sales History	Yes	
Include Remarks on Names History Reports	Yes	
Membership Tracking	Yes	

Names

Default A/R Code – Select from phone #, sequence or Use store # as prefix (used for multi store locations)

Use Template for Name Notes – This will input the text you have enter in “Templates” in the note pad in the names file

Show Consolidated Account Balances in Names – This is a multi-store feature which will display the account balances for a particular name from all stores

Verify Balances before displaying record in Names – Each time you open names, the system will verify the balance

Verify consolidated sales on names before displaying record

Allow received on account through the names screen – Allows you to not only do a Received on Account from POS but also from the Names file

Show serial numbers on Names sales history – this will display the serial # of items in the sales history of the name record

Include remarks on Names history reports

Membership Tracking –

ACCOUNTING		
External Accounting Program	QB - Quick Books	
Accounting Program Path		
Post Recurring Invoices	Yes	
ROA: 100% Payment of Recurring Invoices Required		
Match Payments against Invoices (Track Invoices)	Yes	
Default AR Terms		

Accounting

External Accounting program – Select the external accounting program you are using – QuickBook, BusinessWorks or none

Accounting Program Path – enter the path where the Accounting program is located Ex. C:\QuickBooks

Post recurring Invoices – Automatically posts the specified amount to the customer's account when monthly statements are prepared. Run the procedure at any time but statements must wait a day to be printed so new recurring payments will be included.

ROA: 100% payment of recurring invoices required

Match payments against invoices – Allows you to select an invoice when applying a payment

Default AR Terms – This will use the default terms set in configuration. Select from the drop down. You may override this in names

INVENTORY		
Upper Case only Mode for Item ID	Yes	
Upper Case only Mode for S/L	Yes	
Default Margin (percent)		0%
Automatically Change List Price not Margin when cost is changed	Yes	
Format ItemID	No	
Keep Inventory Description Info when Adding New Item	No	
Enable Use of Flexible Spending Cards (for Medical Expenses)	Yes	
Enable Setting Store Prices Different from List Prices	No	

Inventory

Upper Case only mode for Item ID – Makes all letters upper case in the Item ID field when adding or changing inventory items

Upper Case only mode for S/L - Makes all letters upper case in the S/L field when adding or changing inventory items

Default margin – This will be the default margin percentage when adding items. This can be changed. Automatically change List Price not Margin when cost is changed – If set to Yes, when you change the cost of the item it will also change the list price.

Format Item ID –

Keep Inventory Description info when adding new items – Set to Yes, if you want to keep the previous description when adding similar items to inventory. This helps save time.

Enable Use of Flexible Spending Cards – FSA for medical expenses

Enable Setting Store Prices different from List Price –

PURCHASING		
Include Retail Price and Margin on PO	No	
Purchase Order Items Display by	Stock Locator	
Purchase Order Layout	Portrait	
When Including Freight in Cost: Reset current cost to Vendor Cost?	No	
Track FFL Information when Receiving Serialized Items	No	

Purchasing

Include Retail Price and Margin on PO – displays the retail price and margin on Purchase Orders and the receiving report

Purchase Order items display by – lists items on a PO by UPC or Stock Locator

Purchase Order layout - select from either landscape or portrait view

When including freight in Cost rest current cost to Vendor Cost

Track FFL information when receiving serialized items –

REPORTS		
Sales Summary and Dept Sales by Sales Code	Yes	
Show Store Number for Store 1 on Reports	No	
Include Cash Drawers with no Activity on Cash Drawer Report	No	

Reports

Sales Summary and Dept Sales by Sales Code – displays these reports for only the Sales Code selected

Show Store # for Store 1 on Reports – Multi-store feature. This will display Store 1 on Store 1 reports

Include Cash Drawers with no Activity on Cash Drawer Report – This will display all cash drawers on the report even if there is no activity on them

Sales Code & Security allows you to set up each employee with a unique login that can be configured to either allow or deny them access to specific features or modules in the software. The employee will use their sales code and password to login to the software. CAP installs with 4 profiles. Hello (H) is the default login sales code, Clerk (C) has the least access, Assistant Manger (AM) has more access and Manager (MG) has complete access.

Sales Code	Shortcut	Sales Person	Password	Commission	Store #	AR Code	Description
ASSISTAN	AM	Assistant Manager	*****		1		
CLERK	C	Clerk	*****		1		
EGA	E	Little E	*****	10 %P	1		S Sales
H	H	HELLO	*****	10 %S	1		D Development
JJ	J	Joe Jones	*****	0	1		
LLA	L	Liesl	*****	5 %P	1		S Sales
MANAGER	MG	Manager Profile	*****	0	1		

F1 Help
Edit Staff
Department
Definitions
Shift Setup
Add
Change
Delete
Find
Esc Exit

To **Add a new employee**, highlight one of the 3 Profiles (Clerk, Asst Manager or Manager) depending on what type of employee they are and select Add. The new sales code will start all the settings of the select Profile. This saves you from having to make all the settings each time. These setting can also be adjusted to fit the particular employee.

Now enter the employees Sales Code (CGP), shortcut code (GP) and Sales Person name (Gary Patterson). If you are tracking commissions for this employee enter the % rate and select from either sales or profit.

Sales Code
Store Number

Shortcut
ARCode

Sales Person

Password

can only be entered at login screen when strong passwords

Reset
Generate

Commission

Assigned to

Print Login Tag

F1 Help

Esc Cancel

Security Settings

When you are finished select Security Settings.

Sales Code Store Number
 Shortcut ARCode
 Sales Person
 Password
 can only be entered at login screen when strong passwords
 Commission
 Assigned to
 Security Settings

Now select each of the 9 modules (Inventory, Names, SellWise Menu, Purchasing, Vendors, Configuration, Sell Items, Reports, Time & Calendar) to further define this employees access.

The setting are YES/NO so either this employee has access to perform this function if set to YES or does not have access if set to NO. Simply click on the definition to toggle from Yes to No.

If the employee attempts to perform one of the definitions that is set to NO, the software will require them to get a Managers approval before it will allow them.

Inventory

Inventory Security Settings for MANAGER	
Pricing Utilities - Quantity Pricing, PromoPricing, Matrix Manager	Yes
Price Levels	Yes
Inventory Checker	Yes
Serialized	Yes
Warranty	Yes
Custom Lists and Value Analysis	Yes
Tags/Labels	Yes
See Costs	Yes
Add	Yes
Change	Yes
Delete	Yes
View Notes	Yes
History	Yes
View Kits	Yes
Edit Kits	Yes
Description	Yes
Price (Retail)	Yes
Edit other than Min/Max (when this is 'No' ONLY min/max can be changed)	Yes
Change Quantity On Hand	Yes
Full Details Access	Yes

Names

Names Security Settings for MANAGER	
See Balance	Yes
Add Names	Yes
Change Names	Yes
Delete Names	Yes
View Sales History	Yes
Create List Reports	Yes
View Notes	Yes
View Account History	Yes
Layaway	Yes
Labels	Yes
Write	Yes
Change Credit Limit without Manager Approval	Yes
Change Pricing Options	Yes

SellWise Menu

Sellwise Menu Security Settings for MANAGER	
Configuration	Yes
Accounting Link	Yes
Order/Receive	Yes
Sell Items	Yes
Inventory	Yes
Names	Yes
Vendors	Yes
Reports	Yes

Purchasing

Order & Receive Security Settings for MANAGER	
Edit Order	Yes
Receive	Yes
Change Quantity Only	No
Allow Returns (Negative Quantities)	Yes
Allow Quantity Received to Exceed Quantity Ordered	Yes

Vendors

Vendors Security Settings for MANAGER	
Add Vendors	Yes
Change Vendors	Yes
Delete Vendors	Yes
Labels	Yes
Write	Yes
View Notes	Yes

Configuration

Configuration Security Settings for MANAGER	
Station Settings	Yes
Station Hardware	Yes
Store Settings	Yes
Phone/Shipping & Miscellaneous	Yes
Sales Codes and Security	Yes
Layaway & Frequent Buyer	Yes
Departments	Yes
Printer Setup	Yes
Receipt & Invoice Options	Yes
Set Data Path	Yes
Taxes	Yes
Tenders	Yes
Utilities	Yes
Hot Keys Manager	Yes
Definitions for Additional Info, Internal Use and Units of Measure	Yes
Terms Manager	Yes
Change Encryption password	Yes
View Security Logs	No
Reset User Passwords	No

Sell Items

Selling Security Settings for MANAGER	
Add Items	Yes
Drawer Hot Key	Yes
Invoice - Find	Yes
Invoice - Reprint	Yes
Invoice -Void	Yes
Invoice -Unvoid	No
Layaway Transactions	Yes
Paid Out	Yes
Packing List	Yes
Internal Use	Yes
Sell NonStock Items(Open Dept)	Yes
Quote	Yes
Quote - Hide Prices	Yes
Show Margin, Cost & Profit	Yes
Tax Override	Yes
Cancel Sale	Yes
Cancel Line Item	Yes
Discounts	Yes
Discounts - Line Item	Yes
Discounts - Override Name Discount	Yes
Edit Price	Yes
Returns	Yes
Returns - Line Item	Yes
Override Credit Limit	Yes
Allow Sales of Out-of-Stock Merchandise	Yes

Returns	Yes
Returns - Line Item	Yes
Override Credit Limit	Yes
Allow Sales of Out-of-Stock Merchandise	Yes
Allow Coupons	Yes
Allow Minimize	Yes
Allow Phone Authorisation for credit cards	Yes
Show Last 4 Digits of credit card number	Yes
Allow Input of New Serial Number when Selling	Yes
Allow Exit POS	Yes
Allow Dollar Amount	Yes
Allow Cash Drawer Report	Yes
Allow Cash Drop	Yes

Reports

Reports Security Settings for MANAGER	
Sales Summary	Yes
Sales Detail	Yes
Inventory	Yes
Customer	Yes
Accounts Receivable	Yes
Employee	Yes
Daily Reports	Yes
Custom	Yes
Export	Yes
Graphs	Yes

Time & Calendar

Time Clock Security Settings for MANAGER	
Edit Employee Hours	Yes
Employee Hours Reports	Yes
Edit Calendar for All Sales Codes	Yes
Edit Calendar for own Sales Code only	Yes

The **Password** should be created by the employee. This will be done the first time they log into the software, if you have the Strong Security Password required set to YES in Configuration – Store Settings.

The first time they login they will see the message “You have not setup a password yet. Click OK to setup a password now”.

The screenshot displays the software's login screen. At the top, there are input fields for 'Sales Code' (containing 'gp') and 'Password', each with a corresponding label button. To the right of these fields are two buttons: 'Accept' (with a green checkmark icon) and 'EXIT Cancel' (with a red 'EXIT' icon). Below the input fields, the date 'Thursday, October 13, 2011' is displayed. A modal dialog box titled 'Log In Password required' is open in the foreground. The dialog contains the message 'You have not setup a password yet. Click OK to setup a password now' and has 'OK' and 'Cancel' buttons at the bottom. At the very bottom of the login screen, there are two buttons labeled 'Time Clock' and 'Calendar'.

Create your password. It will need to be a minimum of 7 characters containing both alpha and numeric to be considered a Strong Security Password. The re-enter the password to verify. You also select the Generate button and have the software create a password for you.

Enter Password:

Re-Enter Password:

Minimum 7 characters combining digits and letters required

Tender Types

Define the Tender Types the store will be accepting. Once they are defined they will appear on the POS tender screen.

Tender Description	Tender Type	Open Drawer?	EDC?	Print Receipt?	S/L or Exchange Rate
On Account	On Account	No			
Cash	Cash	Yes	No	Yes	
CHECK	Check	No	No		
Visa	Credit Card	Yes	No	No	
Master Card	Credit Card	Yes	No	No	

Select F4 Add to create a new tender type. Select from the drop downs the Description of the tender (AMEX), the tender type (credit card), if you would like the cash drawer to open when this tender type is selected, EDC (Electronic Draft Capture) if processing card in CAP and if you would like to print an EDC receipt.

If one of your tenders is attached to an item (ex. Gift Card), enter the SL of the item the tender is attached to.

Description:

Tender Type:

Open Drawer:

EDC: Print EDC Receipt:

EDC (Electronic Draft Capture) if you are processing credit/debit cards within CAP using for example Mercury Payment Systems. The EDC YES/NO flag needs to be set to YES. Select F5 EDC button.

Configure EDC by selecting the Method ex. Mercury Payment Server. This will bring up the Details screen. Turn the MercuryPay Authorization to YES and enter the Merchant ID you received from the Processor. Set the other options if they apply.

Select **F5 Configure Pin Pad**, if you will be taking pin debit transactions. Select the Pin Pad from the drop down, set the Com Port the device is attached to, set the baud rate, parity, time out and data bit. F10 Accept to save.

Layaways are sales where the items stay in the store until the Layaway is paid in full.

LAYAWAY	
Startup Fee	0.00
Cancellation Fee	0.00
Minimum Deposit %	25. %
Minimum Deposit \$	0.00
Pull Inventory from Stock (Default Setting)	Yes
Layaway Remarks	
Show Layaway History	Yes

Startup Fee – This is a non-refundable fee required to begin a Layaway. This is not required.

Cancellation Fee – This is a service charge for cancelling a Layaway. This is not required.

Minimum Deposit % - This is the minimum amount, percentage, required to hold an item in Layaway.

Minimum Deposit \$ - This is the minimum dollar amount required to hold an item in Layaway.

Pull Inventory from Stock – Do you want the pulled from stock at the time of the Layaway or when the Layaway is completed.

Layaway Remarks – This will print on the Layaway receipt. Ex. Layaway agreement

Show Layaway History – Show the layaway history

Frequent Buyer

FREQUENT BUYER AWARDS	
Frequent Buyer Reward (Dollar amount)	20.00
Frequent Buyer Goal	200.00
Receipt Message for Rewards Due	Thank you for shopping! You have earned a \$\$\$ coupon valid on your next Visit
Screen Message for Rewards Due	Frequent Buyer Goal Attained! See Receipt for Details
Give Reward	On Next Transaction

Frequent Buyer Reward – This is the dollar discount applied when the purchase goal is reached by the customer.

Frequent Buyer Goal – This is the purchase goal amount that causes the award to be applied when reached by the customer.

Receipt Message for Rewards Due – The message on the receipt when the customer reaches their reward

Screen Message for Rewards Due – The message on the screen when the customer reaches their reward

Give Rewards – Select from either option on whether you want to give rewards on the next transaction or on the transaction that the goal is reached.

Cash Drop

Invoices & Receipts

Change these settings to get the look you want on receipts and invoices. Most are YES/NO and should be self-explanatory. The options in Red applied to just the station you are on and the options in black apply to all stations.

Print Company Name	Yes
Print Company Address	Yes
Print Company Phone Number	Yes
Print Company Web Address	Yes
Print Company Email	Yes
Print Sales Code	Yes
Print S/L or Item ID	Item ID
Discount Message Style	You saved \$\$\$
Allow >1 Line per Item	Yes
Print Sub-Description	No
Print Kit Contents	Yes
Print Station Number	Yes
Print Store Number	Yes
Print Invoice Number	Yes
Print Extended Description	No
Print Sold to A/R Code	No
Print Sold to Phone #	No
Print Sold to Last Name	Yes
Print Sold to First Name	Yes
Print Sold to Business	Yes
Print Sold to Address	Yes
Print Balance Due	No
Print Receipt # as BarCode	No
Company Name Print Style	Normal and Black
Address Print Style	Bold and Black

F1 Help

● Station Specific Setting

● Store Setting

F10 Accept

Esc Cancel

Company Name Print Style	Normal and Black
Address Print Style	Bold and Black
Phone # Print Style	Bold and Black
Change Due	Bold and Black
AVR Terms	
Message on Invoice (80 Column)	Thank you for shopping with us!
Message on Quote (80 Column)	Thank you for shopping with us!
Message on Narrow Receipt(40 Column)	We appreciate your business!
Signature Line for EDC (40 Column)	Signature
Signature Line for EDC (80 Column)	
Signature Line for Tax Exempt	
Signature Line for Return	
Reprint Message	**** COPY ****
Print signature(credit card) copy of receipt without item detail lines	Yes
Print signature copy of Layaway Receipt	No
Print signature copy of Charge on Account Receipt	Summary
Print signature copy of Tax Exempt Receipt	No
Print signature copy of Return Receipt	No
Print Discount Detail Line	Yes
Show each sale of an item individually (Don't accumulate)	Yes
Print Gift Receipt	Yes
Gift Receipt Remarks	
Print Item Location on Pick List	No
Receipt Message Frequency (once every # receipts)	0
Enter Receipt Message	

F1 Help

● Station Specific Setting
● Store Setting

F10 Accept

Esc Cancel

Gift Receipt Remarks	
Print Item Location on Pick List	No
Receipt Message Frequency (once every # receipts)	0
Enter Receipt Message	
Print Cardholders name on Receipt	Yes
Summarize Sequential Serial # on Receipt	Yes
Show both Quantity Ordered & Shipped on 80 Col. Invoice	Yes
Reprint Signature on 40 Col. Receipt	Yes

F1 Help

● Station Specific Setting
● Store Setting

F10 Accept

Esc Cancel

Taxes

Tax Rate A	8.25	%
Tax Rate B	0	%
Tax Rate C	0	%
Tax Rate D	0	%
Tax Rate E	0	%
Is Sales Tax Based on Location of Residence?	No	
Second(Additional)Tax Rate	0	%
Label for Second Tax (eg GST)		
Search Sub-Description for Second Tax Amount	Yes	
used for Advanced Dep. Fee or Volumetric Tax		
No Tax on sales below \$	0	
Tax Adjustment	0	e.g. -0.01
Round Tax up at 3rd Decimal	No	
Calculate Tax on	Total	
Break Point at which tax changes \$	0	
Tax Rate for amounts above Break Point	0	%
Use Ohio Tax Tables	No	
Fiscal Tax ID (A-00-000)		
Fiscal Tax B ID (A-00-000)		
Fiscal Tax C ID (A-00-000)		
Fiscal Tax D ID (A-00-000)		
Fiscal Tax E ID (A-00-000)		

F1 Help
Split Taxes Setup
Edit Location Tax Table
F10 Accept
Esc Cancel

Phone/Shipping/Lottery/Miscellaneous

Company Information	
Phone Number (Max Length 14)	(817)560-7007
Fax Number (Max Length 14)	(817)560-8249
Web Address	www.capauto.com
Email	Support@capauto.com
TBAC Permit #	ABC123456
Shipping	
UPS Account	st00-00-000
Shipping S/L #	
Shipping S/L #	
Shipping S/L #	
Lottery	
Department Code used for Lottery Sales	
Stock Locator used for Lottery Sales (used on Quick Keys)	236.
Stock Locator used for Lottery Pay Outs	235.
Store Percentage of Lottery Sales	10
Export to PayRoll	
PayRoll Format	
PayRoll Store Description	
Gratuities	
Stock Locator used for Service Charge	
Service Charge Percentage of Total Sale	0
Internet Links	
Show Web Link on POS Screen	No
Web Link Address for POS	

Company Information

Phone Number – Enter the store phone number

Fax Number – Enter the store fax number

Web Address – Enter the stores web address

Email – Enter the store email address

TABC Permit # - For Texas wholesale liquor store. Enter the TABC (Texas Alcoholic Beverage Commission) permit # for the store

Shipping

UPS Account – Enter the stores UPS account number

Shipping SL# - Enter the Stock Locator used for shipping charges. This will remove shipping from total sales and reports it as a separate line item.

Lottery

Department Code used for Lottery Sales – Enter the Department code for Lottery items. This will separate lottery revenue from sales in Sales Summary report

Stock Locator used for Lottery Sales – Enter the SL# of the item used for lottery sales. This will separate lottery revenue from sales in Sales Summary report. Used on Quick Keys.

Stock Locator used for Lottery Paid Outs – Enter the SL# of the item used for lottery paid outs. This will separate lottery paid outs from sales in Sales Summary report. Used on Quick Keys.

Store Percentage on Lottery Sales – Enter the % amount the store receives for lottery sales. The Sales Summary will show the store's % of lottery sales as revenue.

Export to Payroll

Payroll Format – Select from the drop down list the format you are using for Employee payroll deduction. This sets the Time & Attendance export to the format required by the payroll processing software.

Payroll Store Description –

Gratuities

Stock Locator used for Service Charge –

Service Charge Percentage of Total Sales -

Internet Links	
Show Web Link on POS Screen	No
Web Link Address for POS	
Web Link Label	
Website for Card Reconciliation (Paste from Web Browser)	
Check Cashing	
Stock Locator used for Check Cashing Charges	356.
Minimum Service Charge for Check Cashing	1.50
Percent Service Charge for Check Cashing (used when % greater than Minimum Charge)	2
Receipt Message	Thanks for the money suckall!
Other	
Stock Locator used for Line Remarks	31
Rental Department Code	075.000.000
Fintech Customer ID	4444
Shopping Cart Download Format File	None
Email Daily reports to	scott@capretail.com

F1 Help

F5 Set FTP Server Account

F10 Accept

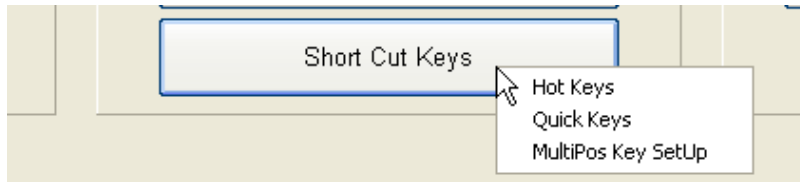
Esc Cancel

Internet Links

Show Web Link on POS Screen -

Short Cut Keys

Configure your Hot Keys, Quick Keys and MutliPos Keys for your POS.



Program Definition

Additional Information

Define your Additional Information terms for your names file

ID	DESCRIPTION
1	team
2	Annv. day
3	Fintech
5	Bday
6	TABC PERMIT
7	TP ID#

Below the table is a large grey rectangular area for additional input or notes.

Buttons: Add, Change, Delete

Buttons: F1 Help, Esc Cancel

Cost Centers

CODE	DESCRIPTION
G	Garden
L	Lumber
T	Tools

Below the table is a large grey rectangular area for additional input or notes.

Buttons: Add, Change, Delete, F9 Print

Buttons: F1 Help, Esc Cancel

Departments

Please see the GSG for Department for detail on adding your departments, sub-departments and classes.

Code	Dept Name	Sub Dept	Class	Tax Code	Margin	Verify Age
001.000.000	General			0	10	
065.000.000	TOYS			A	10	
068.000.000	Retail			A	25	
068.001.000		Hardware		A	25	
068.001.0C			Paint	A	25	
068.001.0C			Plumbing	A	25	
068.002.000		Clothing		A	25	
068.002.0C			Mens	A	25	
068.002.0C			Womens	A	25	
068.002.0C			Children	A	25	
070.000.000	Party			A	35	
071.000.000	General				10	
072.000.000	testme				10	
073.000.000	Liquor			A	15	21
073.001.000		Vodka		A	15	21
073.002.000		Tequila		A	15	21
073.003.000		Scotch		A	15	21
074.000.000	Inttn				10	

Find Department

Help Add > Change Delete Print Cancel

Internal Use Codes

Define your internal use codes ex. Promotions, Damaged, etc as a way to remove item from inventory in the POS without selling them and affecting your sales totals in reports.

CODE	DESCRIPTION
1	Damaged
2	Promotional
3	In House Use
4	Theft

Add Change Delete F9 Print

F1 Help Esc Cancel