



CAP POS

“GETTING STARTED GUIDE”

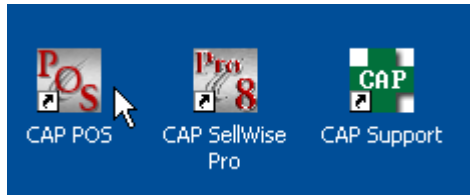
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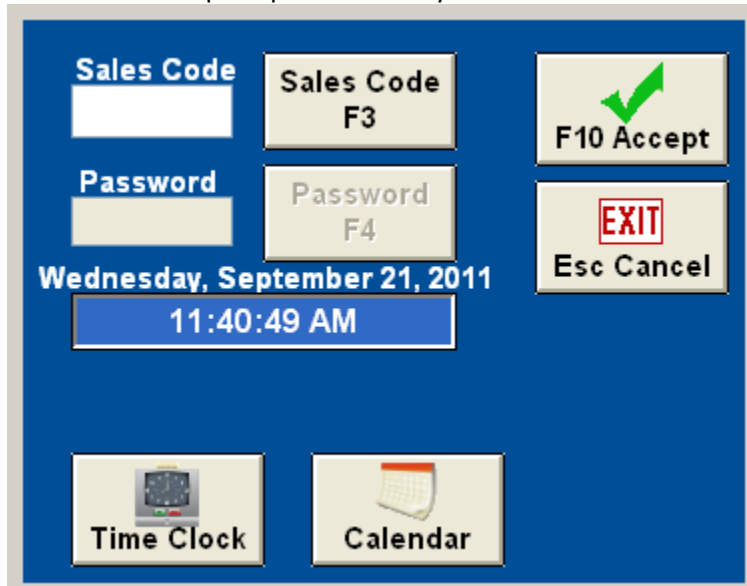
The **CAP POS** training guide is a brief introduction to the most common POS operations. Please see our other guides for more detailed information on specific operations or other modules.

A Touch Screen system is recommended for the POS but you can also use a barcode scanner and keyboard. We do not recommend using a mouse at the POS since it make transactions slower which makes your customers wait time longer.



To enter the POS module, double click the CAP POS icon seen above.

You will then be prompted to enter your Sales Code and Password.



If you are a new user to CAP, you can use the default Sales Code of "H" for Hello with no password to login. You will then need to go create your own unique Sales Code and Password in Configuration under Sales Codes and Security. After that is completed, you can then login with your own unique Sales Code and Password.

The POS screen can be configured several ways. The **MultiPOS** screen which gives you 4 Quick Keys, Tender Keys and dollar amount keys, the **Quick Key** screen which displays 12 Quick Keys on the POS screen and the **Hot Key** screen which jumps directly to your Hot Keys screen from the POS. Below you can see examples of all 3 screens. You can define the POS screen you would like in Configuration under Station Settings.

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POS MultiPOS Key screen

CAP POS www.capretail.com Friday, September 23, 2011

PriceCheck Quantity Item Name

Qty = 1

Valued Customer

Qty	Item ID	Description	Price	Total

0 Item

Clerk Printer ON

HELLO

Sub Total .00

Tax .00

Total .00

Hot Keys

Open Dept

Operations

Exceptions

Tender

Reprint F9

CAP Software



\$1	\$5	\$10	Exact Change	Ice Bag Large	LOTTO
\$20	\$50	\$100		Ice Bag Small	LOTTO OUT
Cash	Check	Credit Card	Gift Card	Debit	
Bill To	On Account				

Website

POS Quick Key screen

CAP POS www.capretail.com Wednesday, September 21, 2011

PriceCheck Quantity Item Customer

Qty = 1

Valued Customer

Qty	Item ID	Description	Price	Total

0 Item

Clerk Printer ON

HELLO

Sub Total .00

Tax .00

Total .00

Hot Keys

Open Dept


Operations

Exceptions

Tender

Remark F9

CAP Software



LOTTO A	LOTTO OUT B	Newspaper daily C	Newspaper Sunday D
Ice Bag Large E	Ice Bag Small F	Balloons G	Ziggy Stickers H
Soda - LG I	Soda - Med J	Soda - SM K	Lighter L

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POS Hot Keys screen

CAP POS www.capretail.com Wednesday, September 21, 2011

PriceCheck Quantity Item Customer

Qty = 1

Valued Customer

Qty	Item ID	Description	Price	Total

0 Item(s)

Clerk HELLO

Printer ON

Sub Total

Tax

Total

Hot Keys

Open Dept

Operations

Exceptions

Tender

Remarks

Drinks	Candy	Party	Misc
			LOTTO
			LOTTO OUT
			Ice Bag Large
			Ice Bag Small

Cancel Esc

First Set Home

Previous Set Page Up

Next Set Page Dn

Last Set End

Website

The items will appear on the left side of the screen as they are entered either by scanning, touching a Quick Key or Hot Key, entering a part # using the keyboard or looking up an item through the Item lookup bottom. The sub total, tax and total will appear below the items.

CAP POS www.capretail.com Friday, September 23, 2011

PriceCheck Quantity Item Name

Qty = 1

Valued Customer

Qty	Item ID	Description	Price	Total
1	S1810081	Crepe Streamer Dk Blue	11.00	11.00
1	D0795701	Moorwood Deck Stain Brown Brown	21.95	21.95

2 Item(s)

Clerk HELLO

Printer ON

Sub Total **32.95**

Tax **1.65**

Total **34.60**

Hot Keys

Open Dept

Operations

Exceptions

Tender

Remark F9

CAP Software



\$1	\$5	\$10	Exact Change	Ice Bag Large	LOTTO
\$20	\$50	\$100		Ice Bag Small	LOTTO OUT

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Using a Touch Screen is recommended when using Quick Keys and Hot Keys.

Quick Keys allow you to quickly ring up fast moving items that do not have a barcode to scan. They can be assigned to an item or a department and they can also be configured so that when selected you can enter a price.

To ring up a Quick Key item, simple touch the button of the item you want to ring up. If you do not have a Touch Screen you can use the mouse to make your selection, however, using a mouse at the POS is not recommended.

Hot Keys is another way to quickly add items to the sale without scanning or typing. Hot Keys are usually items that sell frequently, items with no barcode or non-inventory items ex. Fees, services, shipping and handling.

To ring up Hot Key items simply select the Hot Keys button seen below.



This will take you to your defined Hot Keys page.



Then touch the button of the item you want to ring up just like you would for a Quick Key.

Selecting a Hot Key will add the item to the list on the left. Select the Cancel/Esc to return to the sale screen or you can go directly to the Tender screen by selecting the Tender button.

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You can also configure your Hot Keys to have multiple sets and can switch from set to set by selecting the First, Previous, Next and Last Set buttons on the right. A Hot Key can also be configured to go straight to another set. For ex. You could have a button called Drinks and when you selected the Drink button, it would open up a new Hot Key page with all your drinks on it.

Item Lookup

Select the Item button



The Inventory list will appear. Notice the headings. Some have a Function Key associated with the heading. You can either select the heading or the function key (F4/Description) this will highlight the column for you to search. You can also set a default lookup in Configuration under Station Setting.

F4 Description	F5 Sub Desc.	F6 S/L	F7 Item ID	F9 UPC	F8 Dept	Vendor	Qty	Price
Component Cd Player 4x		1.	SNYCDX44	01234567890	071.000.000	ELECT	37	400.00
Monster Truck Conv Kit:rc10		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

When you select the heading, the column will instantly sort. When you starting typing the list will get closer to the item you want with each key typed. Highlight the item by touching it or using the up and down arrows on the right. Once you have found the item you want, select the F10 Accept button to add it to the sale or the ESC button to go back the POS screen without adding the item to the sale. You can also see more details on the item by selecting the View Details button.

Name Lookup

Select the Name button



The Name list will appear. Notice the headings. Some have a Function Key associated with the heading. You can either select the heading or the function key (F4/Last Name). This will highlight the column for you to search. You can also set a default lookup in Configuration under Station Settings.

F7 Company	F6 AR Code	F4 Last Name	F5 First Name	Street	City	State	F8 Zip
Dutch M. Sports	666777777	Baugh	Sam	1 Stadium Dr	Fort Worth	TX	76111
Auto Tint Specialists22	7385509	Bloe	Joe	1608 Clover Lane	Ft. Worth	TX	76125
Squaw Creek Feed Store	2376864	Crambdon	Jed	1248 Squaw Creek Rd	Fort Worth	TX	76136
abc co	VIAITDT	D	Jack	123 main st	dallas	TX	75218
	555555555	danson	ted	1234	slc	TX	76133
International Widget Machines	1111212	Doe	John	107 N. Main	Kalamazoo	WI	01765

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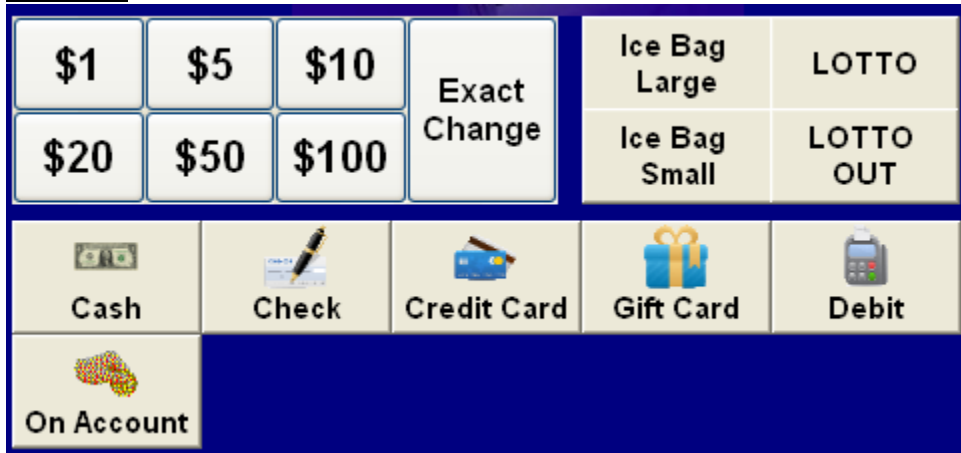
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When you select the heading, the column will instantly sort. When you start typing the list will get closer to the name you want with each key typed. Highlight the name by touching it or using the up and down arrows on the right. Once you have found the name you want, select the F10 Accept button to add it to the sale or ESC button to go back to the POS screen without adding the name to the sale. You can also view more details of the name by selecting the View Details button.

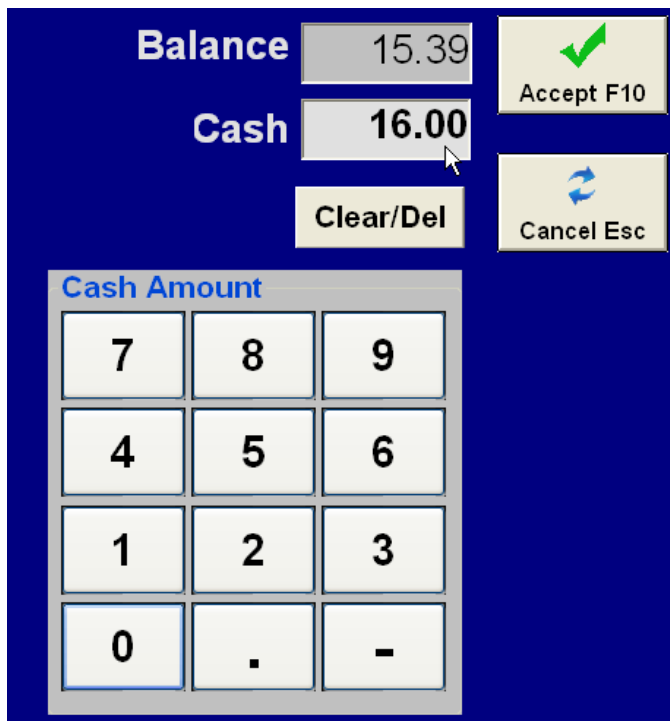
Tendering the Sale

Once you have entered all the items and added the customers name (if needed) to the transaction you are now ready to tender the sale. This again will be determined by which POS screen you have selected.

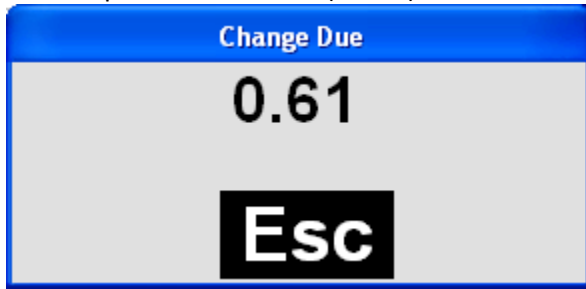
Multi POS



On the Multi POS screen, if the customer is paying by cash, you can select the Exact Change button if the customer is giving you the exact amount of the sale. You can also select the pre set dollar amount keys or you can select the Cash button to enter the amount of cash the customer is giving you seen below.



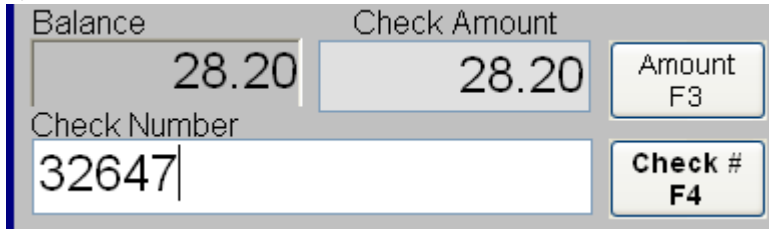
If change is due to the customer, you can configure the software to display and extra Change Due box at the completion of the sale (below).



Other Tender types

Checks

You can record the check number and amount of each check. The Tender Detail report lists each check #, the amount and the transaction number.



Credit Cards

Credit Cards are processed through Mercury Payment Systems or by the system you have selected that is integrated with CAP. If you are using a stand alone terminal, just enter the first digit of the card number. If you are using an integrated system, like Mercury, then swipe the card through the magnetic stripe reader.



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On Account

The On Account tender will only appear as an option when a name is selected at the POS. Use this tender type when you want to charge the amount to the customers account.

Bal. Due on Sale	434.18	Amount	
Account Balance	174.75	Reference	
Charge on Account	434.18		
New Account Balance	608.93		
Reference or Person's Name	8179245555		

7	8	9	Back Space
4	5	6	Clear
1	2	3	
.	0	-	/
Space			

The Balance Due for this invoice will appear, along with the customers account balance and total balance. The reference defaults to the customers A/R Code which you can change by selecting the Reference F4 button. This could be, for example, the name of the person charging to the account. Press the Accept F10 key to complete the invoice.

Split Tender

You can enter multiple tender types (up to 5) on one sale.

Sub Total	229.50		
Total Tax	11.28		
Total Sale	240.78		
Cash	90.78		
Visa	150.00	#XXXXXXXXXX	
3			
4			
5			
Change Due	.00		

Packing List	
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Reprint Receipt

The easiest and fastest way to reprint a receipt is to select the Reprint F9 button on the POS screen after you complete the sale. This will reprint the last sale you completed. The button changes from Remarks to Reprint every time you complete a sale.



Once you start another sale this button will be changed back from Reprint to Remarks



Remarks can be added to the individual receipt by selecting the Remarks F9 button. You can select from 9 different predefined Remarks or type in the blank text box for a custom Remark.

A store wide Remark (message) can also be entered in Configuration under Invoice & Receipts. The message will display on all receipts at every station. An example of this could be your return policy.

Operations

Select the Operations button to Find a previous invoice, suspend a transaction in progress or pull up a previously suspended transaction to edit or complete. Other options are ring up an Internal Use, do a Paid Out, Layaways, Cash Drawer and Drawer Counts, Receive On Account, Quotes, Packing and Pick Lists, Work Orders and create an Alternate Ship to address. See the Operations doc for more details.



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Exceptions

Select the Exceptions button to make changes to your transaction before completing. The Exceptions are grouped by Sale and by Item. Depending on which option you select will determine if you apply the Exception to the entire transaction or to the item you have highlighted. Example of these are Canceling, Returns, Discount and Tax Override. You can use the up & down arrows to select the individual item. See the GSG - POS Exceptions doc for more details.

Sale		Item	
Cancel	10% Disc.	Cancel	Price
Return	15% Disc.	Return	Tax Override
Disc %	20% Disc.	Discount%	Vendor Coupn
No Sale	25% Disc.	Sales Code	Store Coupon
Tax Override		Quantity	Dollar Disc







Profit Margin			
Sale	Total Cost 68.33	Profit 90.99	Margin 57.1%
	Total Disc 6.93		
Item	Total Cost 50.00	Profit 81.58	Margin 62.0%
	Total Disc 6.93		



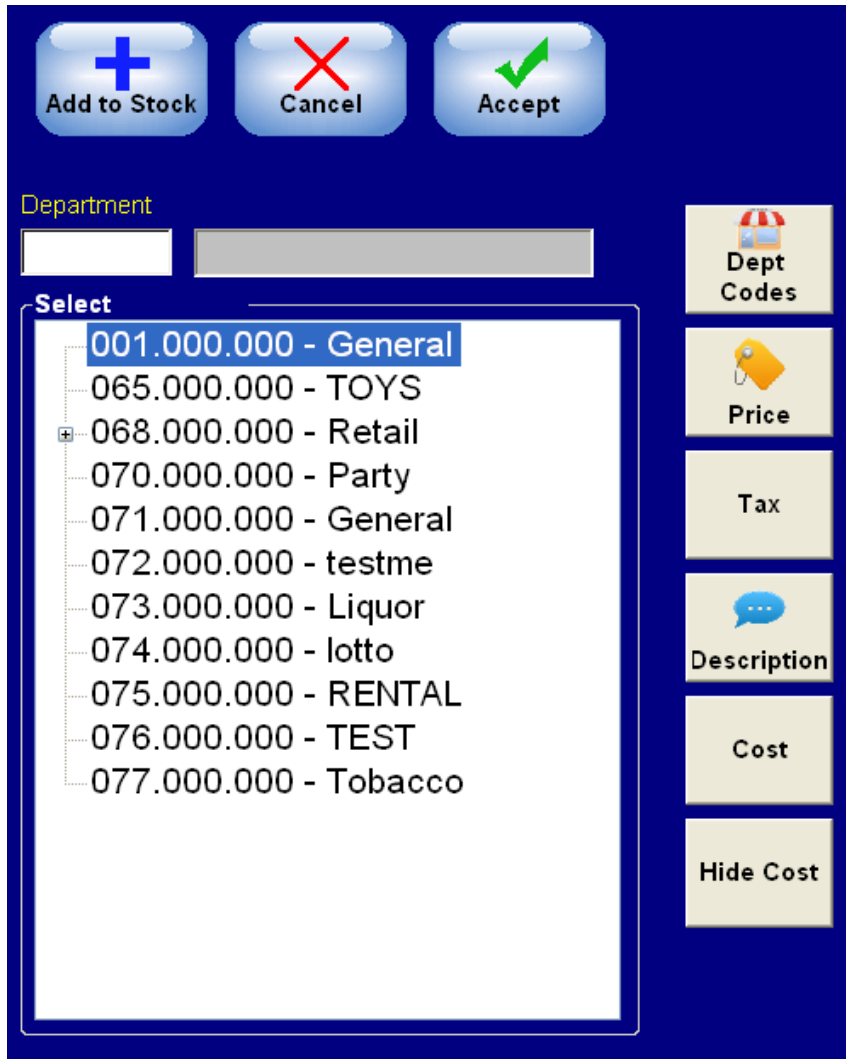
Open Department

Select the Open Department button to sell items that are not in the inventory database.

Hot Keys	Open Dept	Operations	Exceptions	Tender	Reprint F9
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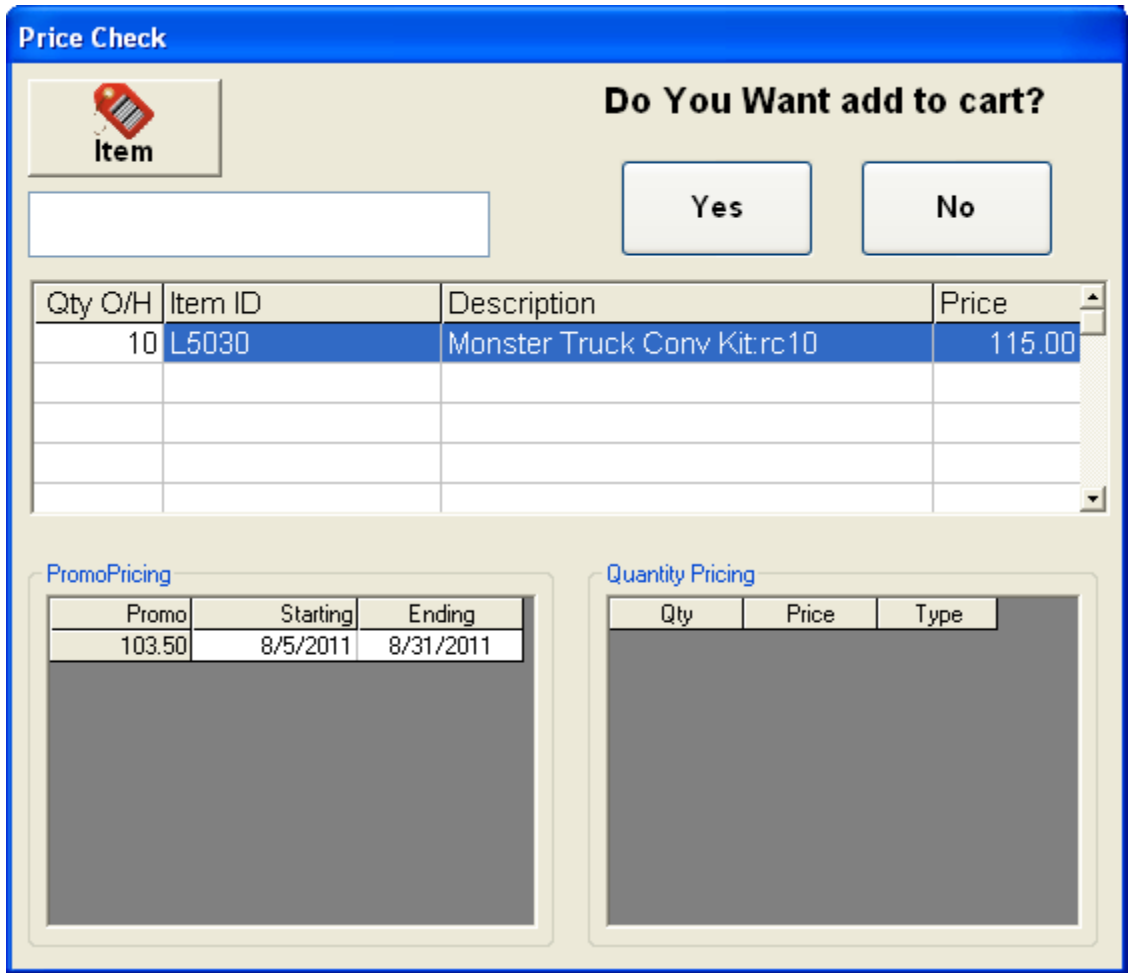
Select the Department of the item you are selling from the Department list. Then enter the Price of the item you are selling. You can also enter a description, tax rate and cost of the item. There is also an option to add this item to stock.



Price Check

Select the Price Check button to check the Price of the item before adding it to the transactions.





Enter the item by scanning the barcode, keying in the part number or selecting the Item button to search for the item. This will add the item to the screen and show you the current Quantity on Hand, Description and Price of the item. It will also display if there is Promo or Quantity pricing attached to the item.

Then select either Yes or No if you would like to add this item to the transaction or not.