



Mobile Mode – Pro 9

“GETTING STARTED GUIDE”

Contents

What Is Mobile Mode: 3

CC Processing in Mobile Mode: 3

Enabling Mobile Mode:..... 3

 First Time Mobile Mode Users:..... 3

 Prior Mobile Mode User: 6

Verify Mobile Mode in Enabled in the POS:..... 8

Verify Mobile Mode enabled in the Back Office: 8

CAP Reports - While Mobile Mode Is Enabled:..... 9

Exiting Mobile Mode:..... 9

CAP Reports – After Exiting Mobile Mode 11

What Is Mobile Mode:

- Mobile mode is a user initiated feature of the CAP POS software that allows the user to disconnect from the main network server and still have the ability to sell and do minimal reporting.
- Tradeshows, sidewalk sales, etc. are reasons mobile mode is beneficial for your business.

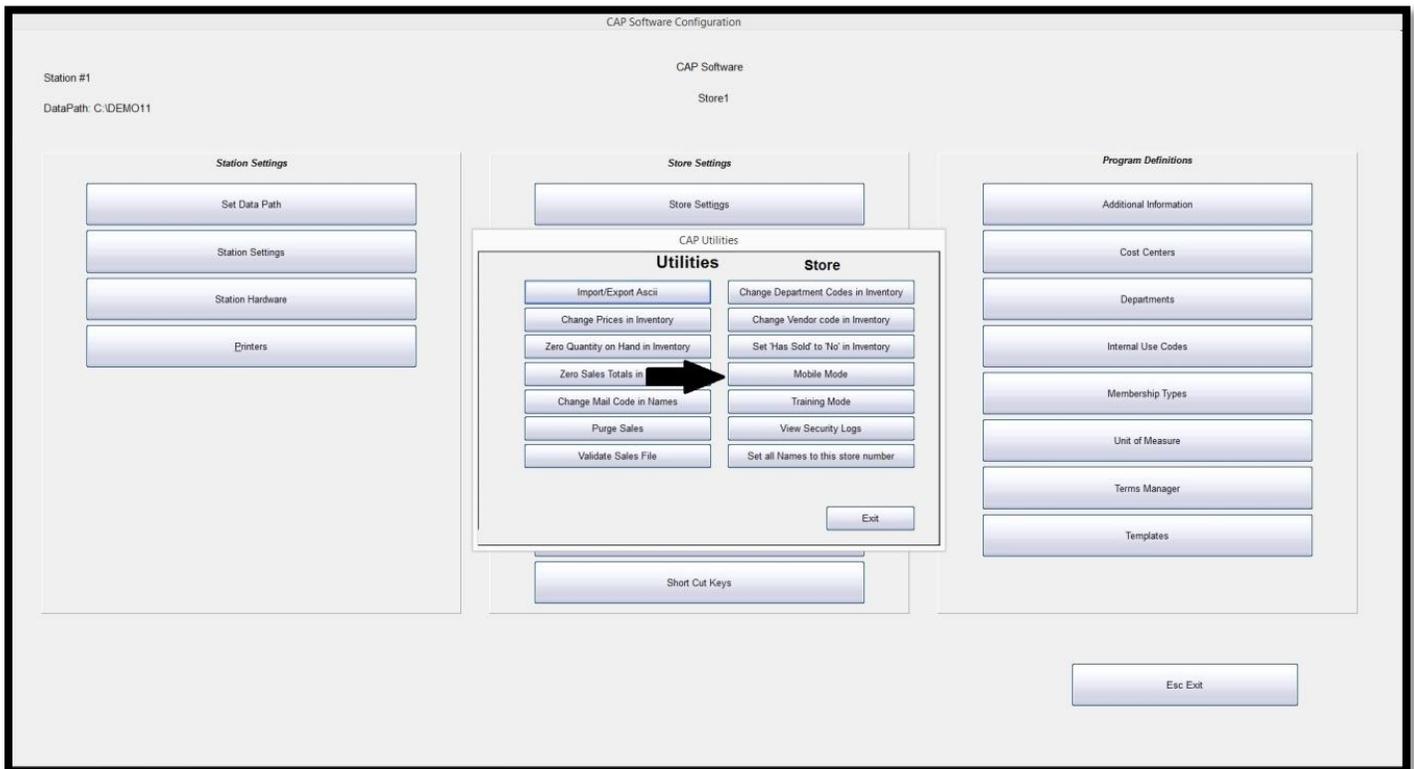
CC Processing in Mobile Mode:

- If you are using EDC (integrated credit card processing) you can still sell as long as you process through either Mercury Payments, Sage, Sterling or PAX. You will still need an internet connection to process transactions in Mobile Mode.

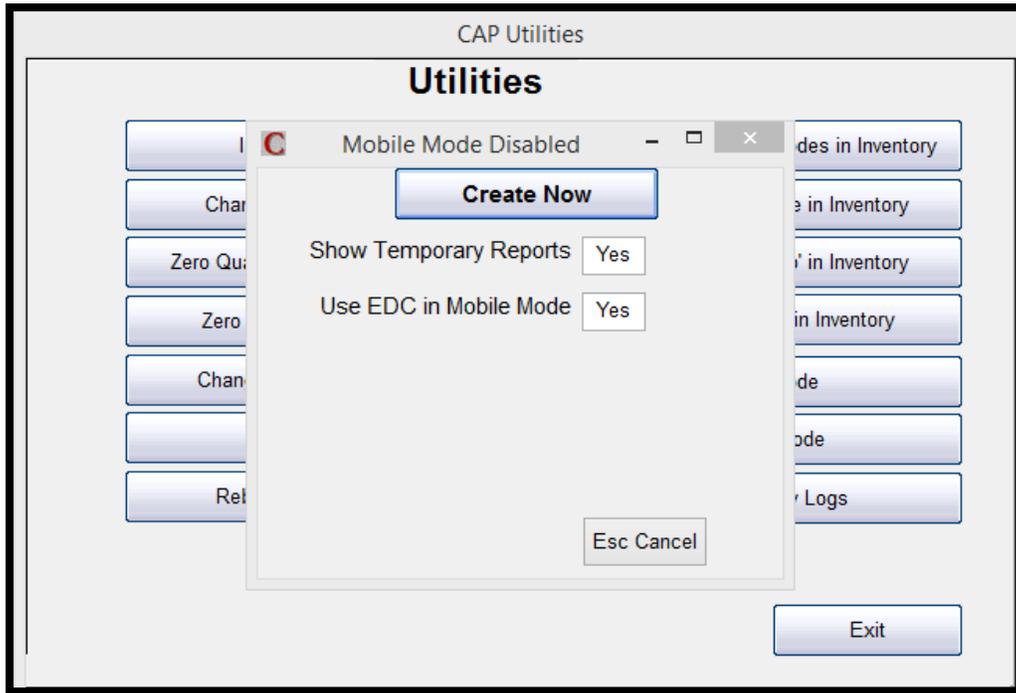
Enabling Mobile Mode:

First Time Mobile Mode Users:

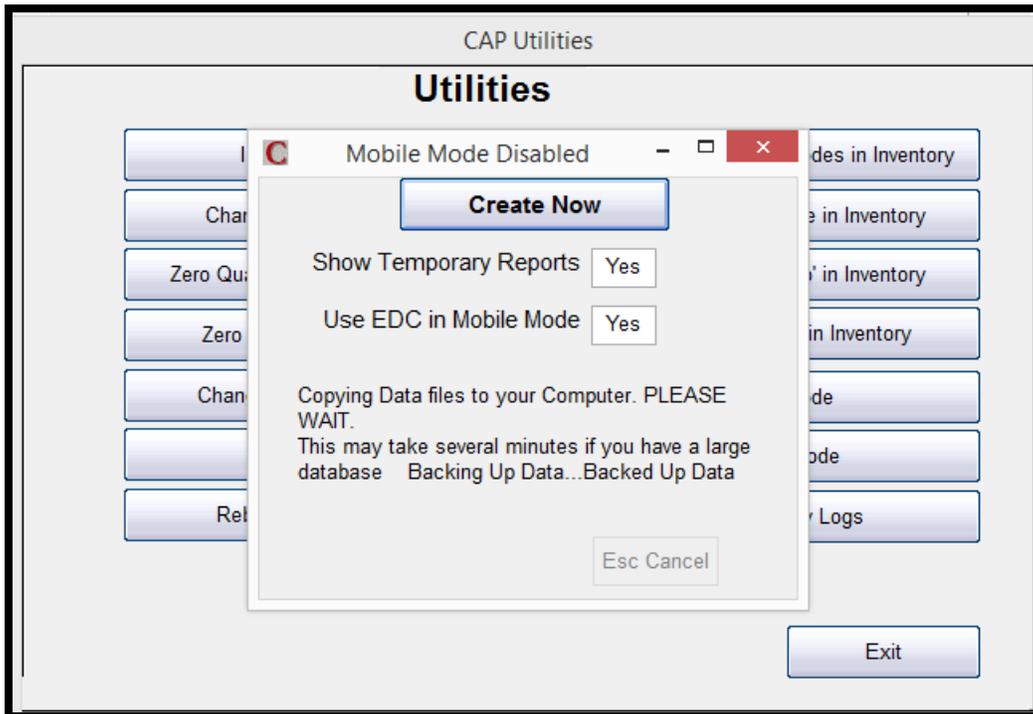
1. To Enable Mobile mode, from the CAP toolbar go to **Help>Configuration>Utilities>Mobile Mode**.
(Please see example below).



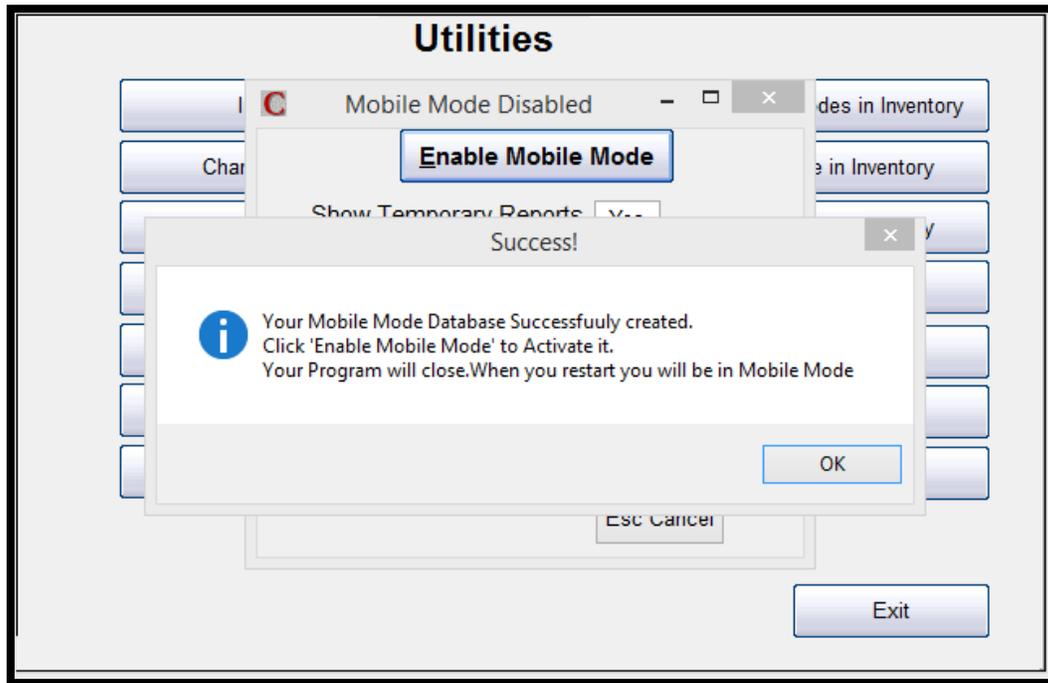
2. Toggle **Yes/No** to **Show Temporary Reports** (view reports while Mobile Mode is enabled) and **Use EDC in Mobile Mode** (process credit cards) and select **Create Now**. (Please see example below).



3. The files will be copied to your computer. This may take several minutes depending on the size of the data files being copied and the speed of the network. (Please see example below).



4. Once the files are updated select **OK**. Please see example below.



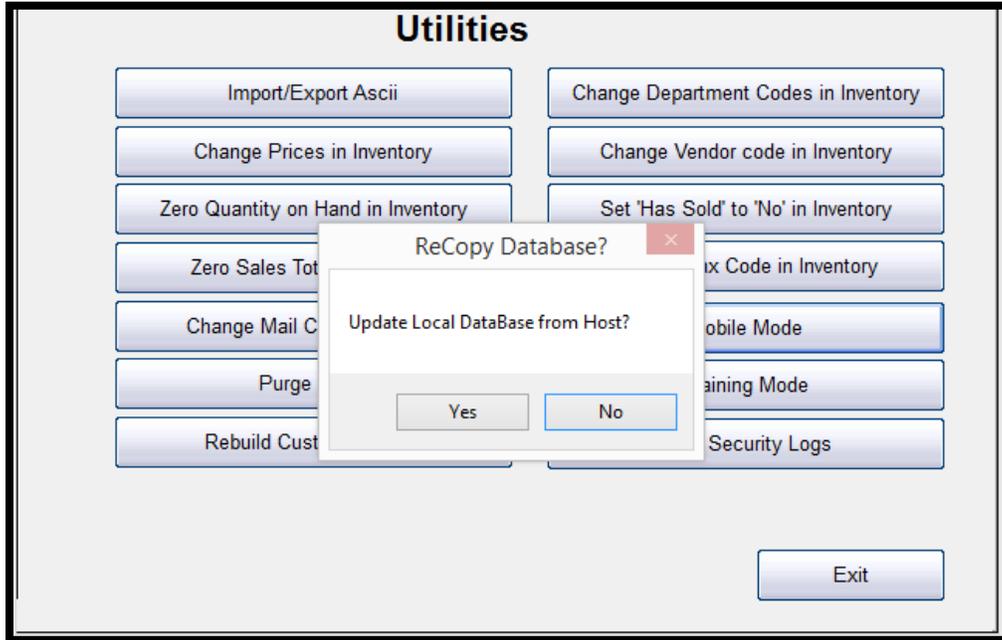
5. Select **Enable Mobile Mode**. Please see example below.



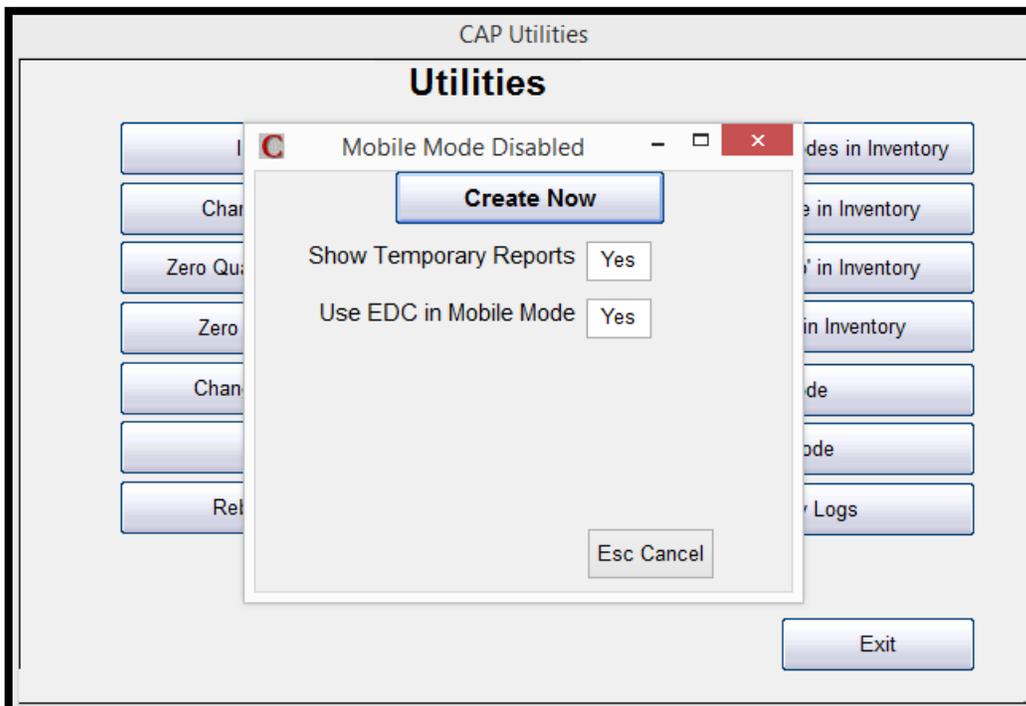
6. Now that you have enabled Mobile Mode, the configuration will close. You can now disconnect your laptop/mobile PC from the network.

Prior Mobile Mode User:

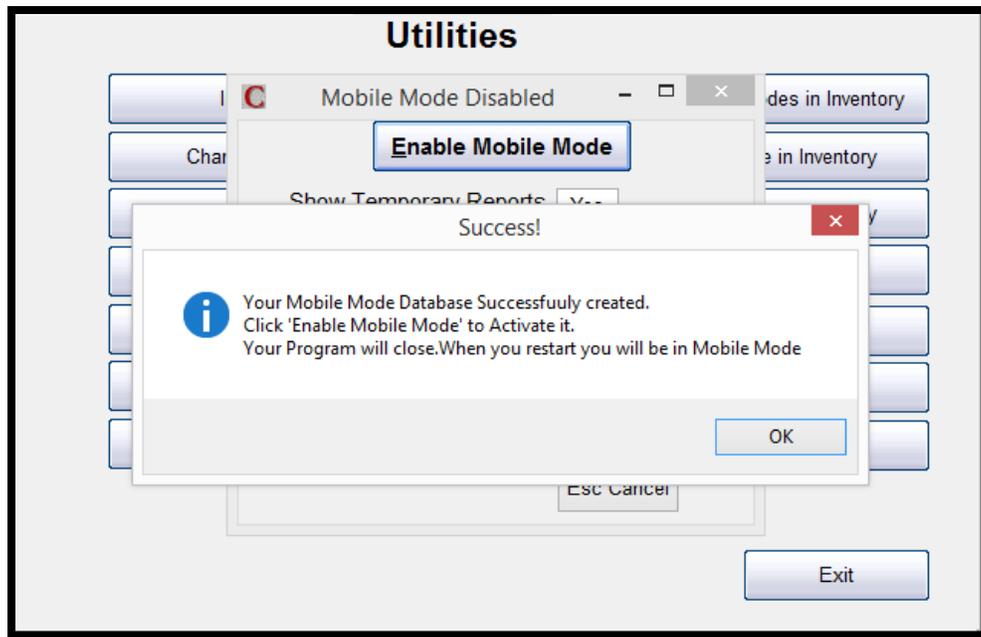
1. To Enable Mobile mode on a computer that has used Mobile Mode in the past, go to the CAP toolbar and select **Help>Configuration>Utilities>Mobile Mode**.
2. Select **Yes** to **Update Local Database from Host?** Please see example below.



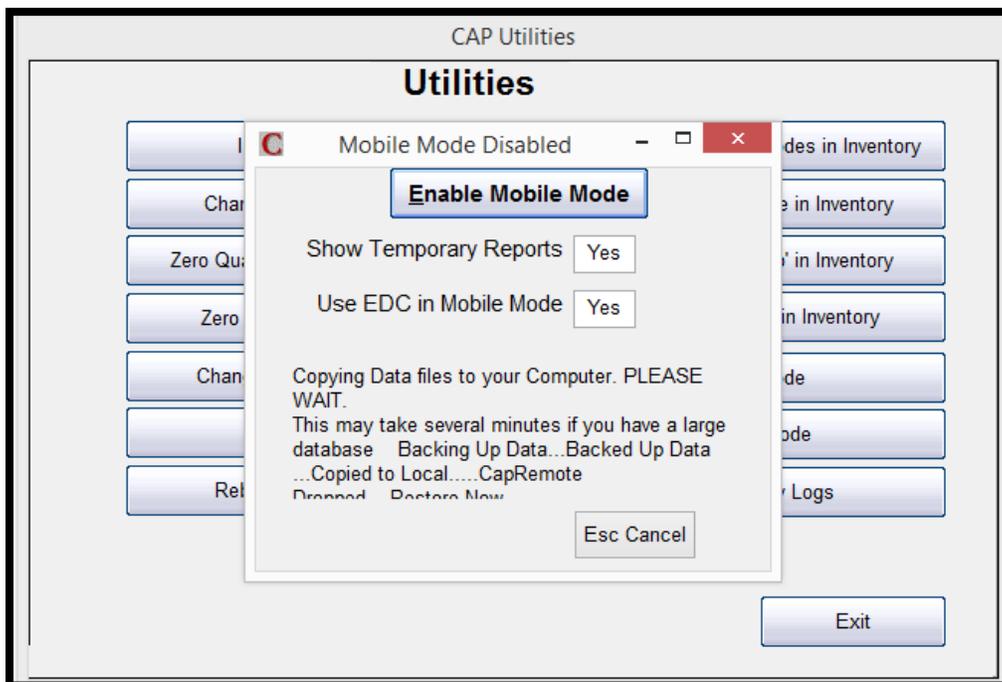
3. Toggle **Yes/No** to **Show Temporary Reports** (view reports while Mobile Mode is enabled) and **Use EDC in Mobile Mode** (process credit cards) and select **Create Now**. (Please see example below).



- The files will be copied to your computer. This may take several minutes depending on the size of the data files being copied and the speed of the network. *(Please see example below).*
- Once the files are updated select **OK**. *Please see example below.*



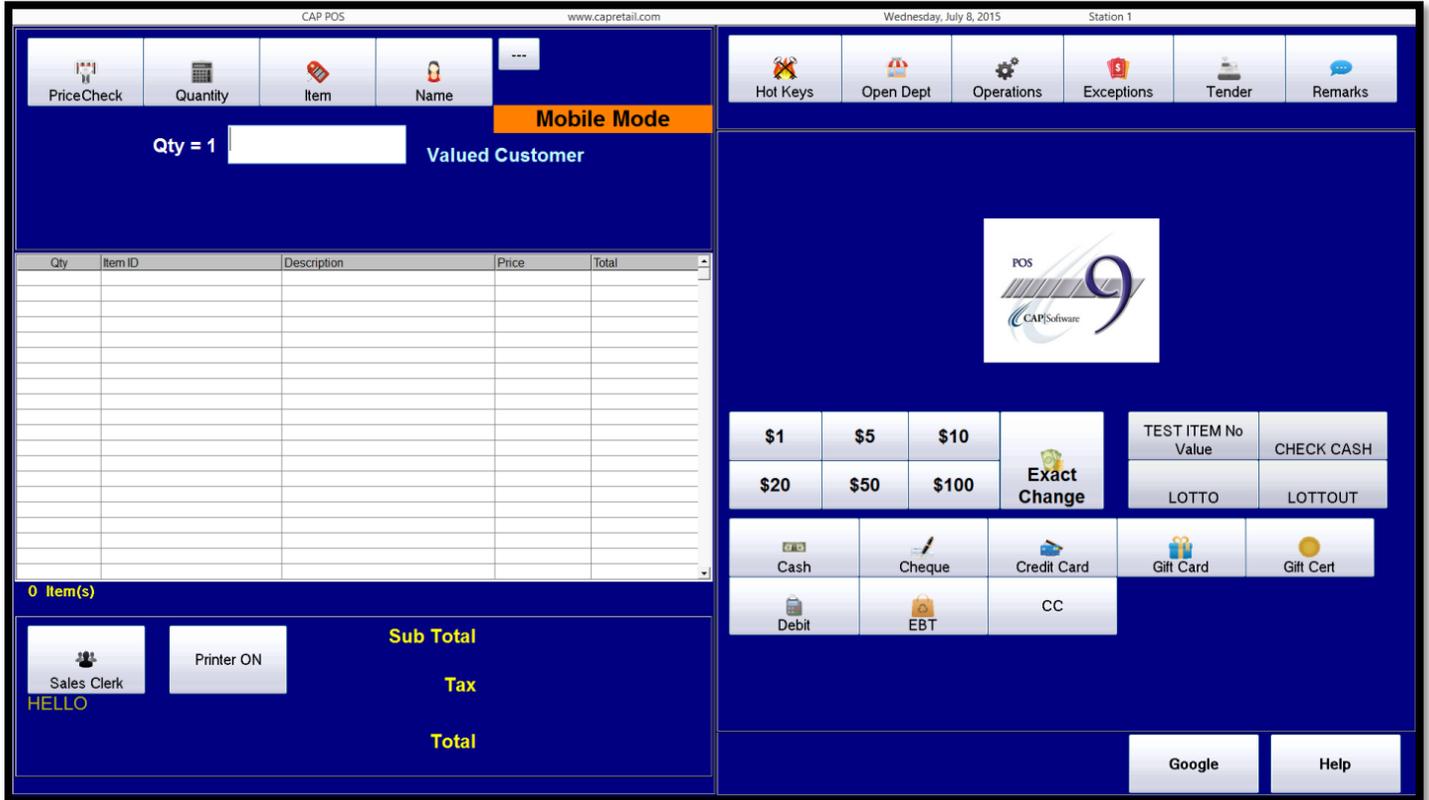
- Select **Enable Mobile Mode**. *Please see example below.*



- Now that you have enabled Mobile Mode, the configuration will close. You can now disconnect your laptop/mobile PC from the network.

Verify Mobile Mode in Enabled in the POS:

1. Open the **CAP POS** and login as normal.
2. Verify that the POS indicates it is in **Mobile Mode** by looking for the orange label above the item box. If so, CAP POS is now ready to process transactions. *Please see example below.*



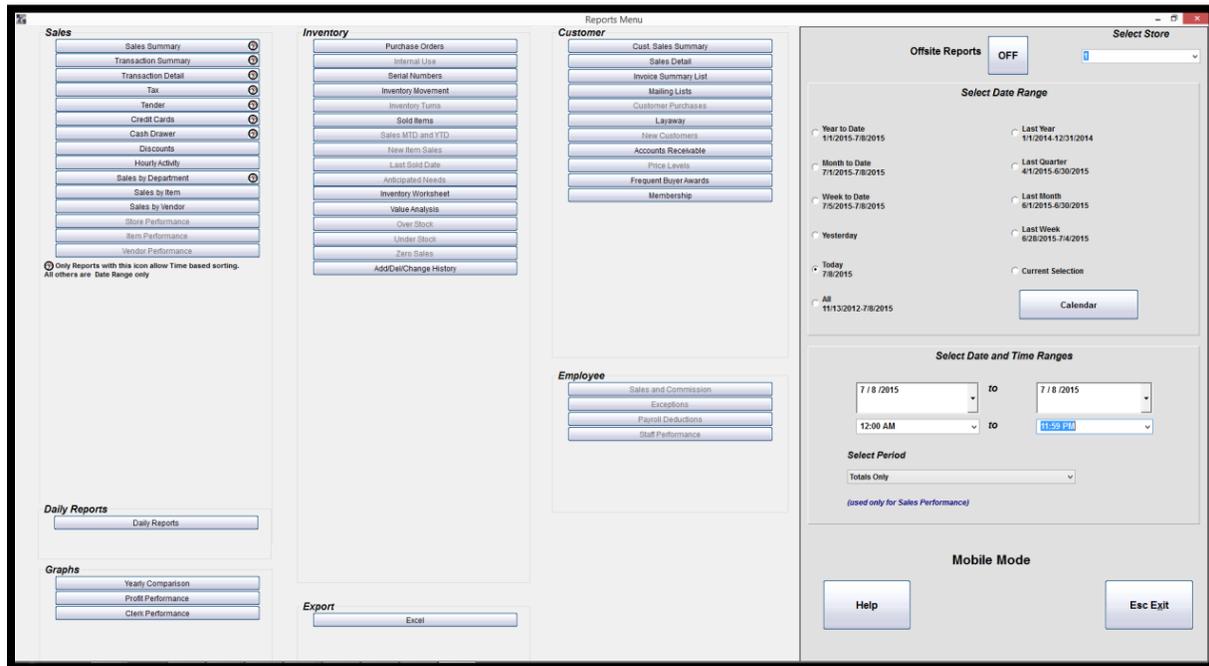
Verify Mobile Mode enabled in the Back Office:

1. Open **CAP** back office and login as normal.
2. Verify that the Back Office indicates it is in Mobile Mode by looking for **(Mobile Mode)** above the Reports module. You will notice that any unavailable features will be grayed out. *Please see example below.*



CAP Reports - While Mobile Mode Is Enabled:

- Reporting in Mobile Mode is limited to sales and a few basic inventory and customer reports. Ignore the Offsite Reports button. That is used for reporting mobile mode sales back at the store after you have uploaded your data.



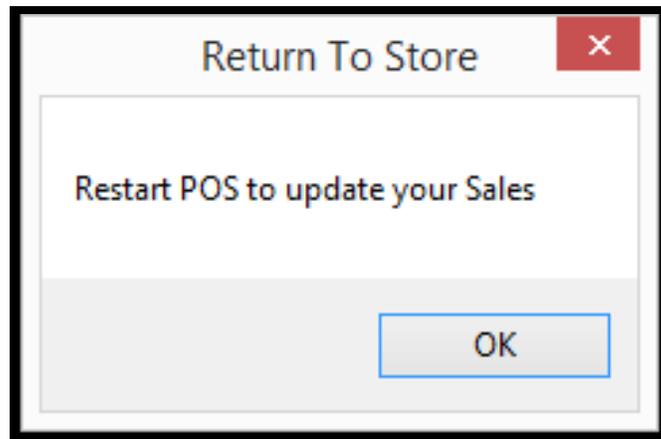
Exiting Mobile Mode:

- You must re-establish your network connection and mapped drive letter before attempting to exit Mobile Mode and rejoin the regular CAP data path. CAP POS must also be closed while running this operation.

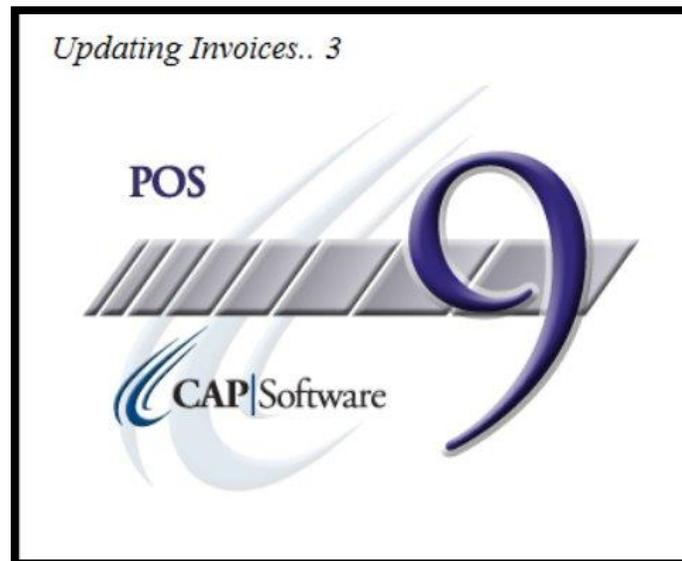
1. From the CAP tool bar select **Help>Exit Mobile Mode**. Please see example below.



2. Select **Ok** to **Restart POS to update your Sales**. Please note, pressing OK does not close the POS for you. It is necessary for you to manually close the POS if it is not already closed. *Please see example below.*



3. Open **CAP POS** and login as normal.
4. The software will automatically upload the data to the main stores database and advise how many invoices are updating. *Please see example below.*



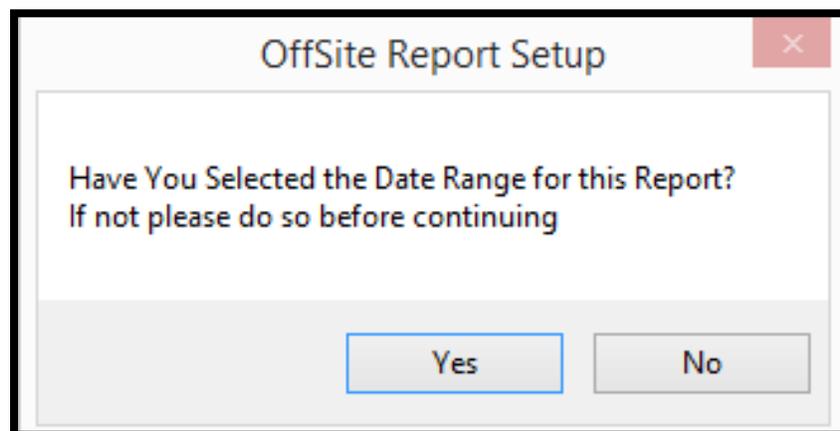
5. Once this process is complete you can close CAP back office. When you re-open CAP back office or CAP POS the system will be in standard operational mode.

CAP Reports – After Exiting Mobile Mode

1. To view Mobile Mode sales that have been uploaded to the store, from the back office toolbar, go to **Reports**.
2. Set the **Date Range** for the sales you want to report on.
3. Select **Off** next to **Offsite Reports**. Please see example below.

The screenshot displays the CAP Reports interface. On the left, there are three main sections: **Sales**, **Inventory**, and **Customer**. The **Reports Menu** is open, showing a list of reports under these categories. A black arrow points to the **Offsite Reports** button, which is currently set to **OFF**. Below this, there are sections for **Select Date Range** and **Select Date and Time Ranges**. The **Select Date Range** section has several radio button options, and the **Select Date and Time Ranges** section has two date and time pickers. At the bottom right, there are **Help** and **Esc Exit** buttons.

4. Press **Yes** to proceed from the **OffSite Report Setup** box when prompted to select a date range as this function should have been performed in step two. Please see example below.



- The following reports are available for Mobile Mode sales only:
- ❖ Sales Summary
 - ❖ Transaction Summary
 - ❖ Transaction Detail
 - ❖ Tax
 - ❖ Tender
 - ❖ Credit Cards
 - ❖ Sales by Department

The screenshot displays the 'Reports Menu' interface, which is organized into several sections:

- Sales:** Includes reports like Sales Summary, Transaction Summary, Transaction Detail, Tax, Tender, Credit Cards, Cash Drawer, Discounts, Hourly Activity, Sales by Department (highlighted with a time-based sorting icon), Sales by Item, Sales by Vendor, Store Performance, Item Performance, and Vendor Performance.
- Inventory:** Includes Purchase Orders, Internal Use, Serial Numbers, Inventory Movement, Inventory Turns, Sold Items, Sales MTD and YTD, New Item Sales, Last Sold Date, Anticipated Needs, Inventory Worksheet, Value Analysis, Over Stock, Under Stock, Zero Sales, and Add/Del/Change History.
- Customer:** Includes Cust. Sales Summary, Sales Detail, Invoice Summary List, Mailing Lists, Customer Purchases, Layaway, New Customers, Accounts Receivable, Price Levels, Frequent Buyer Awards, and Membership.
- Employee:** Includes Sales and Commission, Exceptions, Payroll Deductions, and Staff Performance.
- Custom:** Includes Tender by Department, Item Sale Detail, and Markdown Sales.
- Daily Reports:** Includes Daily Reports.
- Graphs:** Includes Yearly Comparison, Profit Performance, and Clerk Performance.
- Export:** Includes Excel.
- Filters and Settings:**
 - Offsite Reports:** Set to ON.
 - Select Store:** A dropdown menu.
 - Select Date Range:** Options include Year to Date (1/1/2015-7/8/2015), Month to Date (7/1/2015-7/8/2015), Week to Date (7/5/2015-7/8/2015), Yesterday, Today (7/8/2015), All (11/13/2012-7/8/2015), Last Year (1/1/2014-12/31/2014), Last Quarter (4/1/2015-6/30/2015), Last Month (6/1/2015-6/30/2015), Last Week (6/28/2015-7/4/2015), and Current Selection (7/7/2015 - 7/7/2015). A 'Calendar' button is also present.
 - Select Date and Time Ranges:** Date range: 7/7/2015 to 7/7/2015; Time range: 12:00 AM to 11:59 PM.
 - Select Period:** Set to 'Totals Only'.
 - Help** and **Esc Exit** buttons are located at the bottom.

⌚ Only Reports with this icon allow Time based sorting. All others are Date Range only