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Mobile Mode – Pro 9

"GETTING STARTED GUIDE"

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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:

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

n #1	CAP Softw	vare	
ath: C\DEMO11	Store	1	
Station Settings	Store Setting	15	Program Definitions
Set Data Path	Store Setting	5	Additional Information
Station Settings	CAP Utilities	Store	Cost Centers
Station Hardware	Import/Export Ascii	Change Department Codes in Inventory	Departments
Printers	Change Prices in Inventory Zero Quantity on Hand in Inventory	Change Vendor code in Inventory Set 'Has Sold' to 'No' in Inventory	Internal Use Codes
	Zero Sales Totals in Change Mail Code in Names	Mobile Mode	Membership Types
	Purge Sales	View Security Logs	Unit of Measure
	Validate Sales File	Set all Names to this store number	Terms Manager
		Exit	Templates
	Short Cut Key	s	
			Esc Exit

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).

CAP Utilities	
Utilities	
I C Mobile Mode Disabled – 🗆 🗙	des in Inventory
Char Create Now	in Inventory
Zero Qu: Show Temporary Reports Yes	' in Inventory
Zero Use EDC in Mobile Mode Yes	in Inventory
Chan	de
	ode
Ret	' Logs
Esc Cancel	
	Exit

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).*

	CAP Utilities											
	Utilities											
I	C Mobile Mode Disabled – 🗆 🗙	des in Inventory										
Char	Create Now	e in Inventory										
Zero Qu:	Show Temporary Reports Yes	' in Inventory										
Zero	Use EDC in Mobile Mode Yes	in Inventory										
Chan	Copying Data files to your Computer. PLEASE WAIT.	de										
	This may take several minutes if you have a large database Backing Up DataBacked Up Data	ode										
Rel		r Logs										
	Esc Cancel											
	ٳ	Exit										
	L											

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

	Utilities			
I	C Mobile Mode Disabled	_ □	×	des in Inventory
Char	<u>E</u> nable Mobile Mo	de		e in Inventory
	Show Temporany Reports V Success!			×
	Your Mobile Mode Database Successfuuly Click 'Enable Mobile Mode' to Activate it. Your Program will close.When you restart y	created. you will be in	Mobile N	Mode
				ок
	E	sc Cancer		
				Exit

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

	CAP Utilities	
	Utilities	
	Mobile Mode Disabled 🚽 🗖 🗙	des in Inventory
Char	<u>E</u> nable Mobile Mode	e in Inventory
Zero Qu:	Show Temporary Reports Yes	' in Inventory
Zero	Use EDC in Mobile Mode Yes	in Inventory
Chan Ret	Copying Data files to your Computer. PLEASE WAIT. This may take several minutes if you have a large database Backing Up DataBacked Up Data Copied to LocalCapRemote Dropped Postere New Esc Cancel	de ode / Logs
		Exit

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**.

	Utilities					
Import/Expo	ort Ascii	Change Department Codes in Invent				
Change Prices	in Inventory	Change	Vendor code in Inventory			
Zero Quantity on H	and in Inventory	Set 'Has	Sold' to 'No' in Inventory			
Zero Sales Tot	ReCopy Da	tabase?	x Code in Inventory			
Change Mail C	Update Local DataBase	from Host?	obile Mode			
Purge	Yes	No	aining Mode			
Rebuild Cust			Security Logs			

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*).

Exit

	CAP Utilities												
	Utilities												
C	Mobile Mode Disabled 🛛 🗖 🗙	des in Inventory											
Char	Create Now	e in Inventory											
Zero Qu:	Show Temporary Reports Yes	' in Inventory											
Zero	Use EDC in Mobile Mode Yes	in Inventory											
Chan		de											
		ode											
Rel		Logs											
	Esc Cancel												
	[5.3											
	l	Exit											
	il com coloc@conrotail.com cunnart@co	aratail com											

(800) 826-5009, Monday through Friday, 8:00am-5:30pm Central Time

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

	Utilities
L Char	Mobile Mode Disabled - - × des in Inventory Enable Mobile Mode > in Inventory
	Show Temporary Reports Ver Success!
0	Your Mobile Mode Database Successfuuly created. Click 'Enable Mobile Mode' to Activate it. Your Program will close.When you restart you will be in Mobile Mode
	ОК
	Esc Cancer
	Exit

6. Select Enable Mobile Mode. Please see example below.

	CAP Utilities	
	Utilities	
1	C Mobile Mode Disabled ×	des in Inventory
Cha	Enable Mobile Mode	e in Inventory
Zero Qu	Show Temporary Reports Yes	' in Inventory
Zero	Use EDC in Mobile Mode Yes	in Inventory
Chan	Copying Data files to your Computer. PLEASE WAIT. This may take several minutes if you have a large database Backing Up DataBacked Up Data Copied to LocalCapRemote Dropped Pactors New Esc Cancel	de ode r Logs
	[Exit

7. 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.*

		CAP POS		W	ww.capretail.com			We	ednesday, July 8	, 2015	Station 1		
PriceCheck	Quantity	🇞 Item	0 Name	Moh	ile Mode		🔀 Hot Keys	Open	Dept	Ç Operations	S Exceptions	Tender	emarks Remarks
	Qty = 1		Valued	Custome	r								
Qty Item ID		Description		Price	Total					POS	ware 9		
							\$1 \$20	\$5 \$50	\$10 \$100	Exa	ct	EST ITEM No Value	CHECK CASH
						-	Cash		Cheque	Char	ige Card	LOTTO Gift Card	LOTTOUT
0 Item(s)	Printer ON		Sub Total				Debit		EBT	СС			
Sales Clerk			Tax Total									Google	Help

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.*

Sellwise Pro 9(Mobile Mode)							CAP Software						Station 1			
Reports Por Pure	ase 🔗	<u>T</u> ags	20	<u>N</u> ames		Inventory		Vendors	Û	<u>O</u> ptions	_	P0 <u>S</u>	i	<u>H</u> elp	EXIT	E <u>x</u> it

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.

		Reports Menu	
Sales	Inventory	Customer	Select Store
Sales Summary 💿	Purchase Orders	Cust. Sales Summary	Offsite Reports
Transaction Summary 🕥	Internal Use	Sales Detail	
Transaction Detail	Serial Numbers	Invoice Summary List	
Tax 🕥	Inventory Movement	Mailing Lists	Select Date Range
Tender 🕥	Inventory Turns	Customer Purchases	
Credit Cards 🕥	Sold items	Layaway	
Cash Drawer 🕥	Sales MTD and YTD	New Customers	C Year to Date Last Year 1/1/2015-7/8/2015 1/1/2014-12/31/2014
Discounts	New Item Sales	Accounts Receivable	
Hourly Activity	Last Sold Date	Price Levels	C Month to Date Last Quarter
Sales by Department 🕥	Anticipated Needs	Frequent Buyer Awards	//1/2015-//8/2015 4/1/2015-0/30/2015
Sales by Item	Inventory Worksheet	Membership	Week to Date Last Month
Sales by Vendor	Value Analysis		7/5/2015-7/8/2015 6/1/2015-6/30/2015
Store Performance	Over Stock		Least March
Item Performance	Under Stock		C Yesterday 6/28/2015-7/4/2015
Vendor Performance	Zero Sales		
Only Reports with this icon allow Time based sorting.	Add/Del/Change History		Today Coursest Selection
			Select Date and Time Ranges
		Employee	
		Sales and Commission	1/8/2015 v 10 7/8/2015 v
		Exceptions	
		Payroll Deductions	12:00 AM v 10 11:59 PM v
		oran Periormance	Select Period
			Totals Only
Daily Reports			(used only for Sales Performance)
Daily Reports			
			Mobile Mode
Graphs			mobile mode
Yearly Comparison			
Profit Performance	5		Hala Eas Evit
Clerk Performance	Export		Help Esc Exit
	Excel		

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*.

e cara	ob																
	Sellwise Pro 9(Mobile Mode) CAP Software							Stat	ion 1								
	Reports	Pos Purchase	\mathcal{O}_{0}	<u>T</u> ags	20	<u>N</u> ames	Inventory	 <u>V</u> endors	Ŷ	<u>O</u> ptions	<u> </u>	P0 <u>S</u>	(i)	<u>H</u> elp	EXIT	E <u>x</u> it	
														Contents			
														About			
														Exit Mobile	Mode		
														Configurati	on		
														Registration	n		
														Online Sup	port		
														Check for U	lpdates		
														What's New	/		

 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.

Return To Store ×						
Restart POS to update your Sales						
ОК						

- 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.*

Updating Invoices 3
POS
CAP Software

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.



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.*

OffSite Report Setup						
Have You Selected the If not please do so befo	Date Range for ore continuing	this Report?				
	Yes	No				

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

