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Modern Retail E-commerce / CAP SellWise Pro 9

"GETTING STARTED GUIDE"

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Configure Shopping Cart Items in Inventory:

 All Shopping Cart Inventory needs to have the *Web-Enabled* Flag set to YES. In the C:\Program Files\CAP directory there is a program called *SetWebFlags.exe*. Run this program to set items as Web-Enabled by *Vendor*, *Department*, or *Item in S/L Range*.

🛱 Set Flag on Inventory Items for Inclusion in Web Sales	_		×
☐ All Vendors in Range OR			
Select Vendor			
Department			
If Main Department selected sub Depts Included			
☑ All SL's in Range OR			
S/L Range 4454 to 9963713			
Include Kits			
Ассер	t	Cance	el 🛛

2. From the SellWise toolbar, go to **Inventory** and **Add** an Inventory item for the shipping charges from the shopping cart. Set this shipping charge to **Non-Decrementing** and **Non-Taxable**. After adding the item, make note of the Stock Locater Number. Press **Accept** and **Cancel** to continue.

G Inventory - 7	74,128 Records									- 0	×
Stock	Locater	9991050.			Description	Web Shipping	j Fee			74595	
Vendo	or Item #	9991050	991050		Sub-Description						
		Non-Decrei	nenting Item		UPC(s)			~			
ι	Unit of Measure	EA - Each		~							
		Main		1	Additional Infor	mation	Ì		Messages		
Cost/P	Price										
	Current Cost	(0.00	Margin	%	Tax Code	Non Taxable	~	Volumetric Tax \$		
	Actual Cost	(0.00	Markup	%	Vendor					
	List Price	(0.00	•		Alt Vendor					
						Alt. Vendor	Dept Code	DeptSub De	pt Cla	SS	
					D	epartment	081.000.000	Shipping			
Orderi	ing Information										
	On Hand	0	Maximun	n 1							
	On Order	0	Minimun	n 0							
	Qty / Pack	1	Has Solo	d No							
	Currently Understocked	No	Last Solo	4							
			Do not ReOrde	r False							
Notes											
									^	Edit]
										Find	
									~	Next	
Help	•	Add	Char	nge Dele	ete		story	<u>P</u> rint Tag	Accept	Cancel	

 From the SellWise toolbar, select Help>Configuration>Phone/Shipping/Miscellaneous. Enter the Stock Locater Number of the new Shipping item you just created in the Shipping S/L# field. Press Accept.

Shipping	
UPS Account	st00-00-000
Shipping S/L #	
Shipping S/L #	
Online Shipping S/L#	9991050

4. In Configuration, select **Sales Codes and Security** and create a new sales code called **Web Order** to track shopping cart orders.

CAP Software Configuration - Sales Cod	es & Security						
Sales Code	Shortcut Si	ales Person		Password	Commission	Store #	
ASSISTAN	AM A	ssistant Manager		*****			1
CLERK	C	lerk		*****			1
Н	H	ELLO		*****		0	1
MANAGER	MG M	lanager Profile		*****		0	1
		Sa Sy Pa Co Or Sy Co	Sales Codes & Security ales Code WEB Store I horbcut W A ales Person Web Orders assword gin screen when gin screen when pring passwords Commission 0 ~ ~	- C X lumber 1 Roode Reset Generate			
Help	Add Staff Department Definitions	Add	Change	Delete	Eind	Esc Exit	

5. In Configuration select **Phone/Shipping/Miscellaneous** to add the new **Sales Code**, press **Accept**.

Internet Links	
Show Web Link on POS Screen	Yes
Web Link Address for POS	
Web Link Label	
Website for Card Reconciliation (Paste from Web Browser)	
Sales Code Used for Online Sales	WEB

6. In Configuration select **Tender Settings** and add a *Web Orders* Tender Type.

C Add Tender Type	×
Tender Type Other	~
Description Web Orders	~
Open Drawer No	
F1 Help F10 A	Accept Esc Cancel

On Account Own Count No No No Cach Cach No No Signifue Coy Image: Count Cach No No No Signifue Coy Image: Count Cach No No No Signifue Coy Image: Count Cach Cach No Yes Signifue Coy Image: Count Cach Cach No Yes Signifue Coy Image: Count Cach Cach No Yes No No No Cach Cach No No No No Image: Count Cach Cach No No No Image: Count Image	On Account On Account No Cash Cash Yes Cash Check No Yes Sheck Check No Yes Aaster Card Credit Card No Yes Siscover Credit Card No Yes Signature Copy Siscover Credit Card No Yes Signature Copy MEX Credit Card No Yes Signature Copy Jobit Credit Card No No No Jobit Debt/Card No Yes No Jiber Credit Card No No No No Jiber Credit Card Credit Card No No No Jiber Credit Card Credit Card No No No No Jiber Credit Card Credit Card No Yes Signature Copy Yes Signatur	
Gath Gath Image I	Cash Cash Ves Check No No No Saster Card Ne Yes Signature Copy Aster Card No Yes Signature Copy Aster Card No Yes Signature Copy Jiscover Credit Card No Yes Signature Copy MEX Credit Card No Yes Signature Copy MEX Credit Card No Yes Signature Copy Agaway Account Debit Card No Yes No Add Tender Type Tender Type Other Yes Signature Copy Yes Gredit Card No No No	
Check No On medication	Check No No Master Card Credit Card No Yes Signature Copy Sisa Credit Card No Yes Signature Copy Jiscover Credit Card No Yes Signature Copy MEX Credit Card No Yes Signature Copy Debit Credit Card No Yes Signature Copy ayaway Account Debit Card No No No Yher Credit Card Credit Card No No No Wher Credit Card Credit Card No No No Signature Copy Credit Card No No No	
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Visa Ordf Card No Yes Signature Capy Image: Capy	Arisa Credit Card No Yes Signature Copy Discover Credit Card No Yes Signature Copy MEX Credit Card No No No Debit Debit Card No Ves No ayaway Account Layaway Ac Credit Card No Yes No Ather Credit Card Credit Card No Yes No Signature Copy Mo Yes No	
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MEIX Orest Card No	MEX Credit Card No No No Jebit Debit Card No No No Jebit Card Debit Card No No No Jther Credit Card Credit Card Credit Card Ves No Grift Card Grift Card Tender Type Ves Signature Copy Vescription Web Orders Ves No	
Debd Debd Card No Yes No Image: Signature Capy Card Card Cred Card Cred Card Yes Signature Capy Image: Cap	Debit Debit Card No Yes No _ayaway Account Layaway Ac C Add Tender Type Xer Yes No Diher Credit Card Credit Card Credit Card Yes No No Gft Card Gft Card Tender Type Other Yes Signature Copy Description Web Orders Description Web Orders Yes No	
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Off Card Yes No Description Web Orders Opin Drever Jie Image: Carcel Imag	Gift Card Tender Type Other Yes No Description Web Orders	
Description Web Orders Open Dawer be F1 Help F10 Accept F2 Ebc F10 Accept	Description Web Orders V	
Open Drawer jke F1 Help F10 Accept Exc Cancel F1 Help F4 Add F6 Change F9 EDC F10 Accept Exc Cancel		
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F1 Hep F10 Accept Esc Cancel F1 Hep F4 Add F5 Change F10 Accept Esc Cancel	Open Drawer No	
F1 Help F10 Accept Esc Cancel		
F1 Hep F0 Accept Esc Gancel F1 Hep F4 Add F6 Change F5 EDC F10 Accept Exc Cancel		
F1 Help F0 Accept Esc Cancel F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F5 Change F3 EDC F10 Accept Exc Cancel	F1 Help F10 Accept Esc Cancel	
F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F5 Change F5 EDC F10 Accept Exc Cancel		
F1 Help F4 Add F5 Change F5 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F5 Change F10 Accept Exc Cancel		
F1 Help F4 Add F5 Change F5 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F6 Change F3 EDC F10 Accept Esc Cancel		
F1 Help F4 Add F5 Change F5 EDC F10 Accept Esc Cancel		
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F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
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F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
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F1 Help F4 Add F6 Change F5 EDC F10 Accept Esc Cancel		
	F1 Help F4 Add F6 Change F5 EDC F10 Accent	Esc Cancel
	They found for the Filler Filler	Lac cuncel

• If you require more than 1 Tender Type, add the ones you would like to use as well. Remember SellWise has a limit of 15 tender types total that can be used.

Configure Modern Retail Link:

• This Modern Retail menu lets the user define item and pricing transfers and other scheduled tasks.

Modern Retail			_	
Login Information	Start Time09:00 AM •End Time06:00 PM •StartClean Up	Save Settings		
Update Qty On Hand 30 Mins	Process	Call Between	Status Message	
Add New Inventory Items 60 Mins				
Get Transactions 15 Mins				

1. First, press 'Login Information; and enter the supplied store credentials and press **Save**.

🌍 Web Login			-		×
Web Ser	vice Key:				
********	******	******	****	*	
Store Log	gin				
40864B1	5-8D68-4D7	E-A0	B8-E	3F29	ť
Store Pas	ssword				
********	*******	******	****	*	
	Save				

2. Configure the frequency with which you want the Inventory Quantity On Hand, Price changes and New Items to be sent to the Shopping Cart.



3. Define the hours during which these processes will run. This is typically set to your store hours. Press **Save Settings** when finished.

Start Time End Time	09:00 AM 🔹 06:00 PM 荣		
Start	Clean Up	Save Settings	

• As the utility executes the defined schedule you will see the list of the processes as they run.

Modern Retail							_	×
Login Information	60 Mins v	Start Time End Time Stop	09:00 AM 🗘 06:00 PM 🗘 Clean Up	Save Settings				
Update Qty On Hand	30 Mins ~	Pro ▶ Get	cess Transactions	Call Betv 9:00 AM-	ween 6:00 PM	Status Messa Automatic: 5/3	age 3/2017	
Add New Inventory Items	60 Mins $ \smallsetminus $	Get	Transactions	9:00 AM- 9:00 AM-	6:00 PM 6:00 PM	Automatic: 5/3	3/2017 3/2017	
Get Transactions	15 Mins \vee							

Online Orders to Process in the POS:

1. In the **POS** go to **Operations** and select **Online Order**.

CAP POS		www.capretail.con	ı		Wednesday, May 3, 20	17	Station 1			
l Price C	1 Eneck Quantity	No. Item	Q Name			Kan Keys	S Open Dept	Operations Ex	Ceptions Tender	er Remarks
	Qty = 1		Valued	Custome	r		Configuratio Transaction	on Cale Money	a ndar Ca Special	ancel Output
Qty	Item ID	Description		Price	Total		Ship To	V Internal Use	Layaway	Cash Drawer Report
							C Find Transaction	Paid Out	ayaway PullUp	Drawer Count
							Suspend	Dollar Amt.	Layaway Pay <u>m</u> ent	Quote
							Sind Suspended		EBT	Find PickList
0 Item(s)				•		💕 Online Order	Gift Card	> ROA	Work Order
4 Sales	Printer O	N	Sub Total					Cash Check		
HELLO			Total							

- Your available orders will appear in the list.
- The customer names will already be added into SellWise using the customer supplied Phone Number as the ARCODE in SellWise.
- Future orders by the same customer will be attached using the AR Code reference.
- The Reference number is the order number from the Shopping Cart.
- The Reference number will be saved in the Remarks field automatically.
- The Sales Code is the one you previously defined.

2. Select/highlight the order and press **Accept** to bring the sale to the main POS screen.



CAP POS		www.capretail.com			Thursday, May 4, 2017	Station	1				
PriceCheck	Quantity	🗞 Item	0 Name			XX Hot Keys	Open Dept	Operations	5 Exceptions	Tender	emark
Qty 34524	y = 1		Robert	Smith	Ē	Balance	1739.00	Web Orders	Amount 739.00	Amount	Accept
Qty Item ID 4 XPS451 9HW		Description MICHELIN 451 9HV	v	Price 400.0	Total	1234				Reference	Cancel
1 9991050		Web Shipping Fee		7.0	0 7.00						Clear
						7	8	9	Ba Sp	ack ace	
5 Item(s)					_	4	5	6	СІ	ear	
.181.	Printer ON		Sub Total		1607.00	1	2	3	_		
Sales Clerk			Тах		132.00		0	-		/	
			Total		1739.00		S	Space		_	

3. Select the **Web Orders** tender type and enter the desired reference number or code.

4. Click the **Packing List** box to print a separate packing list. Press **Accept** to finalize the transaction.

CAP P	DS		www.capretail.com			Thursday, May 4, 2017	Station	1				
	PriceCheck	Quantity	⊗ Item	0 Name			K Hot Keys	Open Dept	Operations	(1) Exceptions	Tender	emark
		Qty = 1		Robert	Smith							
34								Sub Total	1607.00			✓
								Total Tax	132.00			Accept
								Total Sale	1/39.00			\sim
	Oty Item	ID	Description		Price	Total		Veb Orders	1739.00	#1234		~
	4 XPS	451 9HW	MICHELIN 451 9H	W	400.00	1600.00		3	1753.00	#1204		Cancel
	1 999	1050	Web Shipping Fee	3	7.00	7.00		4				
								5				
							c	hange Due	.00			
_										Packing L	ist 🛒 🗖	Email
												-
												Switch Brinter
												Switch Philter
5	ltem(s)											
			_									
	- 44	D 1 4 01		Sub Total		1607.00						
		Printer ON										
HE				lax		132.00						
				Total		1739.00						

• This transaction is now complete.

Reporting:

- You should reconcile your Shopping Cart tender report against the CAP 'Tender Type Report.' The 'Web Orders' Tender Type in CAP should match the totals in your Shopping Cart reports.
- From the SellWise tool bar, open Reports and Select a *Date Range* Then select the Transaction Detail Report. Check the Web Sales option and press Accept to only view sales from the Shopping Cart.

Transaction Detail		
Select Transactions to View		Select Station
Sales Sales on Account Discounted Sales Clerk Discounts Sales below Cost Returns	^	All Select Sales Code
Voids Voids Internal Use Overrings No Tax Charged Paid Out Bessived on Assount		Do not include Name Details
 Layaways ✓ Web Sales ☐ High Volume Sales 	~	Include Remarks Show Subdescription
Acce	ot	Cancel

• There are Tender Type Summary or Detail Report options. You can track totals by these reports.

5/5/2017 1:02:18 PM	Tend Fro	CAP - TE ST ler Type Summary Repo om 5/4/2017 To 5/4/2017	vrt	Page 1
Description	Quantity	Amount	Sub Total	
Cash Web Orders	2 5	310.07 5,543.62	5,853.69	
Grand Total		5,853.69		