Modern Retail E-commerce / CAP SellWise Pro 9

"GETTING STARTED GUIDE"

Contents

Configure Shopping Cart Items in Inventory:

1. 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*.

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.

3. 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.
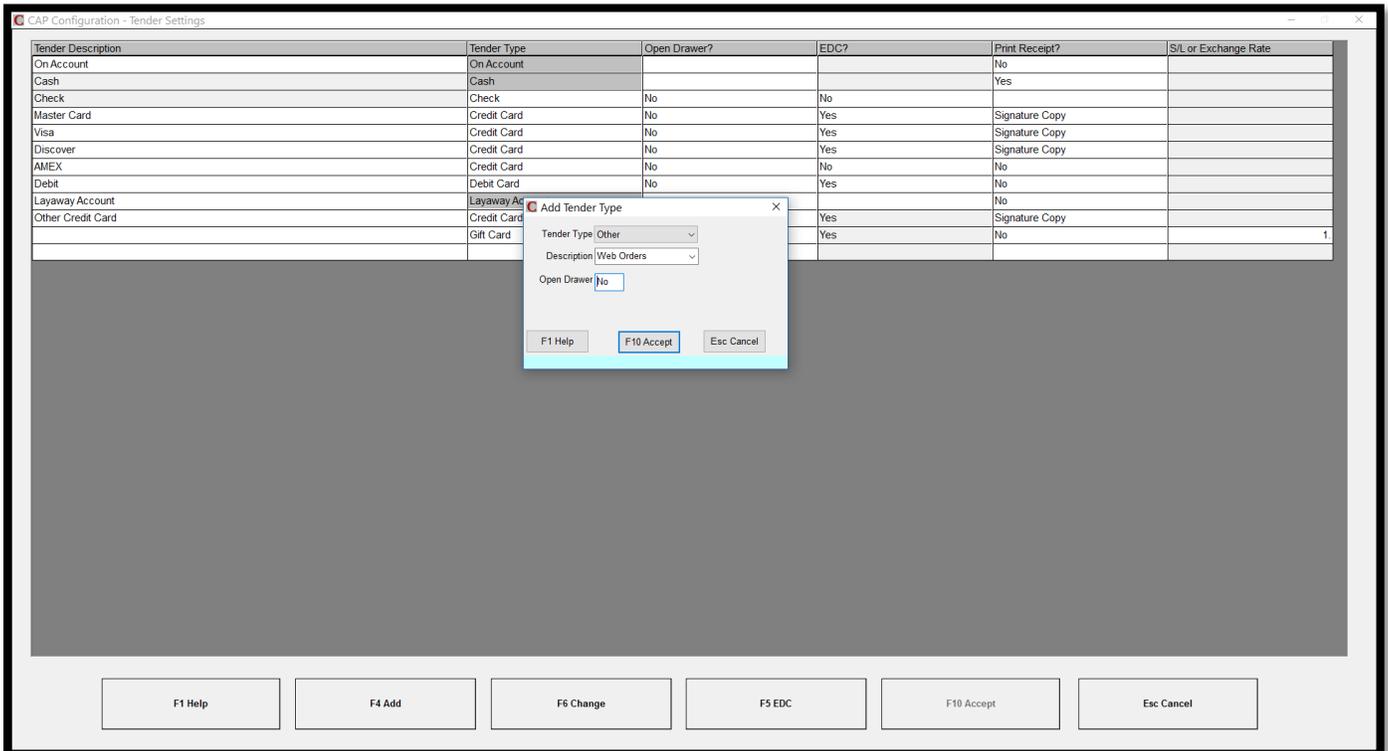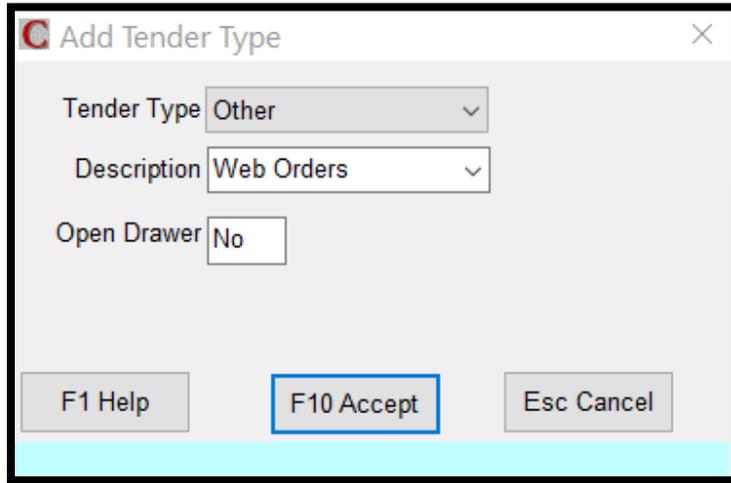

5. In Configuration select **Phone/Shipping/Miscellaneous** to add the new *Sales Code*, press **Accept**.

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

www.capretail.com, sales@capretail.com, support@capretail.com
**(800) 826-5009, Monday through Friday, 8:00am-6:00pm Central Time**

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


- 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.
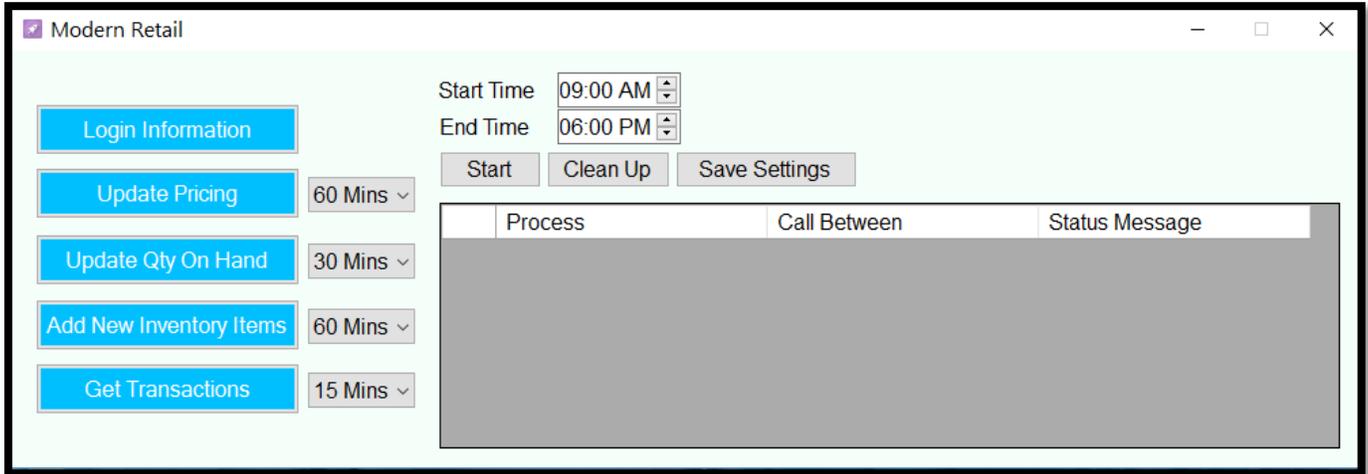
1. First, press 'Login Information; and enter the supplied store credentials and press **Save**.
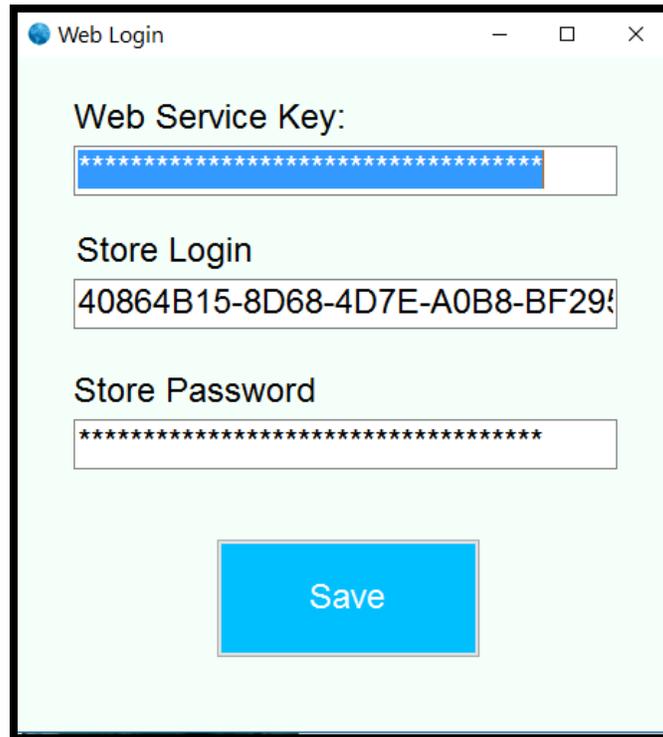
2. Configure the frequency with which you want the Inventory Quantity On Hand, Price changes and New Items to be sent to the Shopping Cart.

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

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

Online Orders to Process in the POS:

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

- 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.

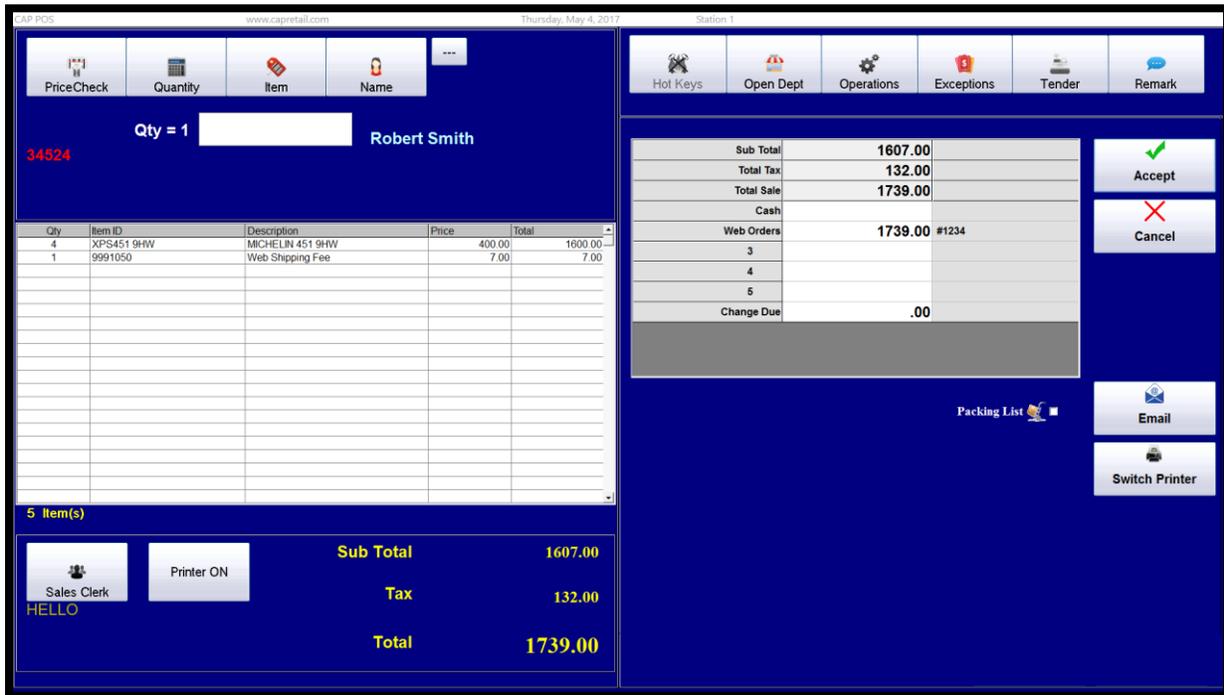3. Select the **Web Orders** tender type and enter the desired reference number or code.
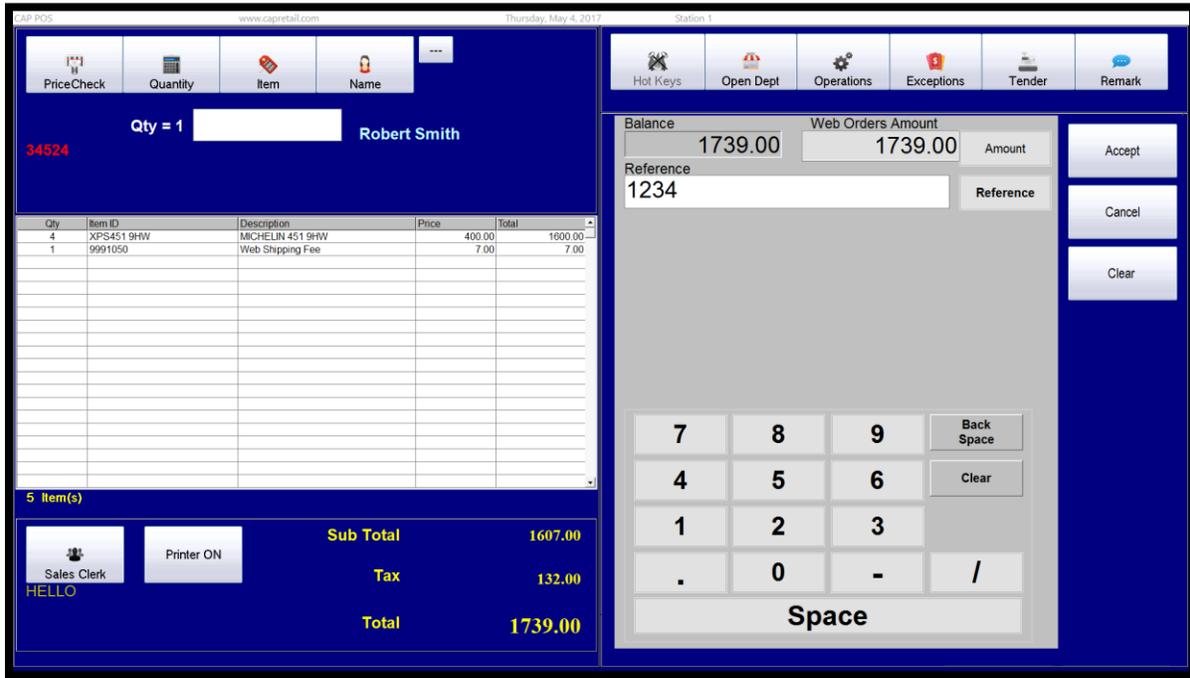
4. Click the **Packing List** box to print a separate packing list. Press **Accept** to finalize the transaction.

- 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.
1. 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.

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