



## Modern Retail E-commerce / CAP SellWise Pro 9

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*“GETTING STARTED GUIDE”*

## Contents

Configure Shopping Cart Items in Inventory:..... 3

Configure Modern Retail Link: ..... 6

Online Orders to Process in the POS:..... 8

Reporting: ..... 11

## 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 Locator Number. Press **Accept** and **Cancel** to continue.

- From the SellWise toolbar, select **Help>Configuration>Phone/Shipping/Miscellaneous**. Enter the Stock Locator 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

- 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 Codes & Security

Sales Code	Shortcut	Sales Person	Password	Commission	Store #
ASSISTAN	AM	Assistant Manager	*****		1
CLERK	C	Clerk	*****		1
H	H	HELLO	*****	0	1
MANAGER	MG	Manager Profile	*****	0	1

**Sales Codes & Security**

Sales Code:  Store Number:

Shortcut:  ARCode:

Sales Person:

Password:  Password can only be entered at login screen when strong passwords

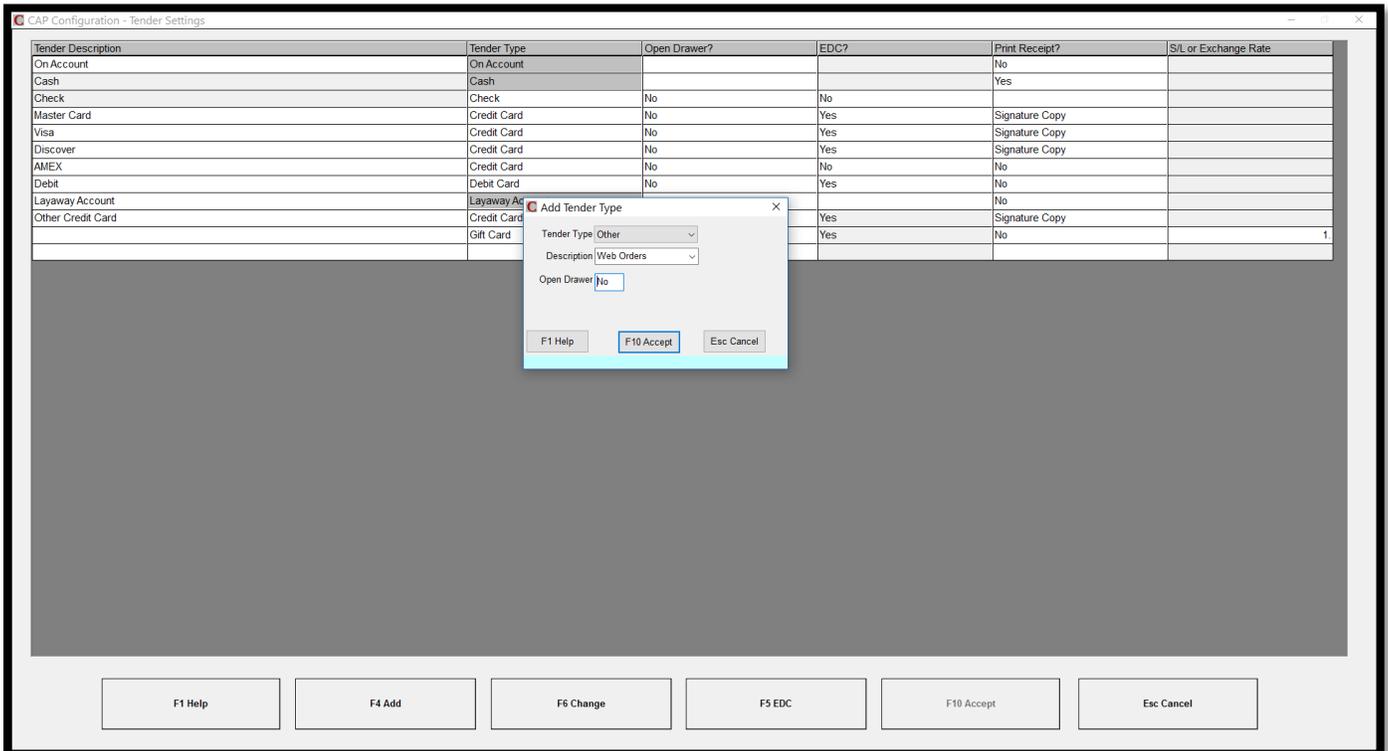
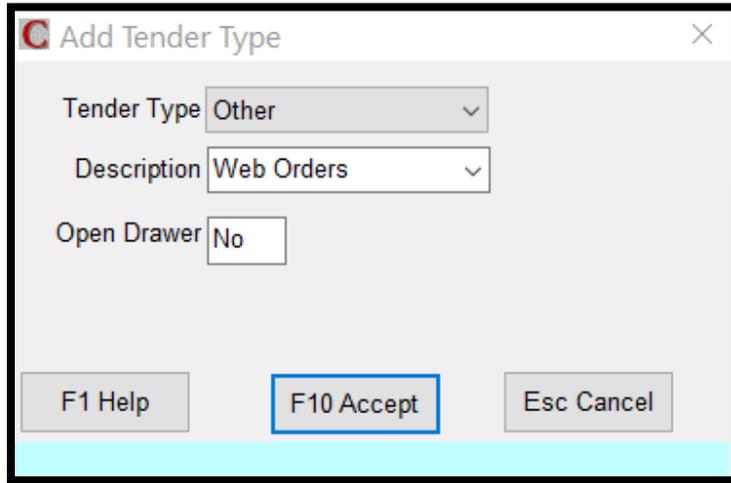
Commission:

- 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

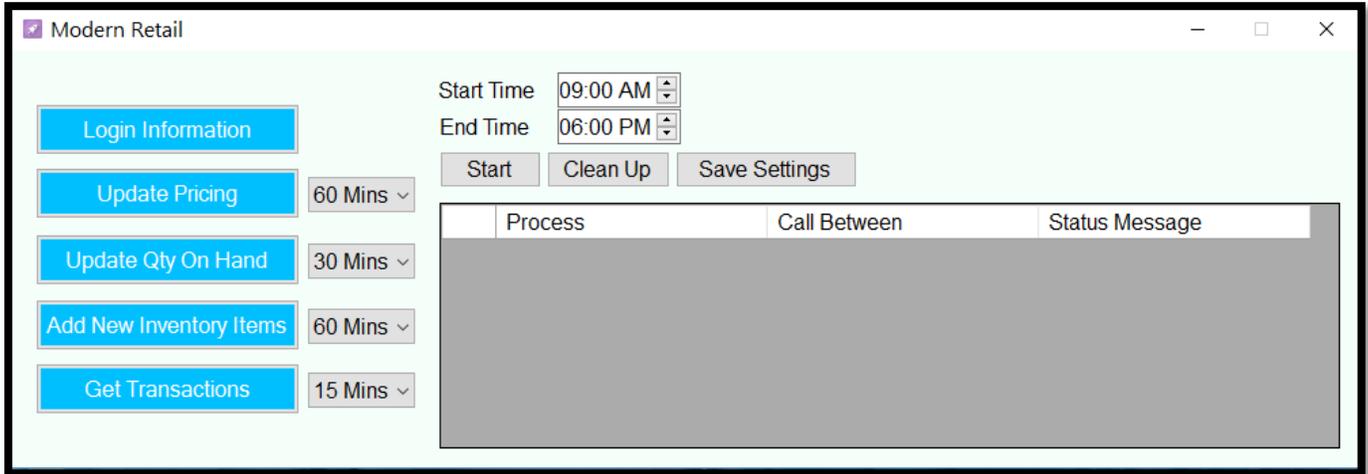
6. In Configuration select **Tender Settings** and add a **Web Orders** Tender Type.



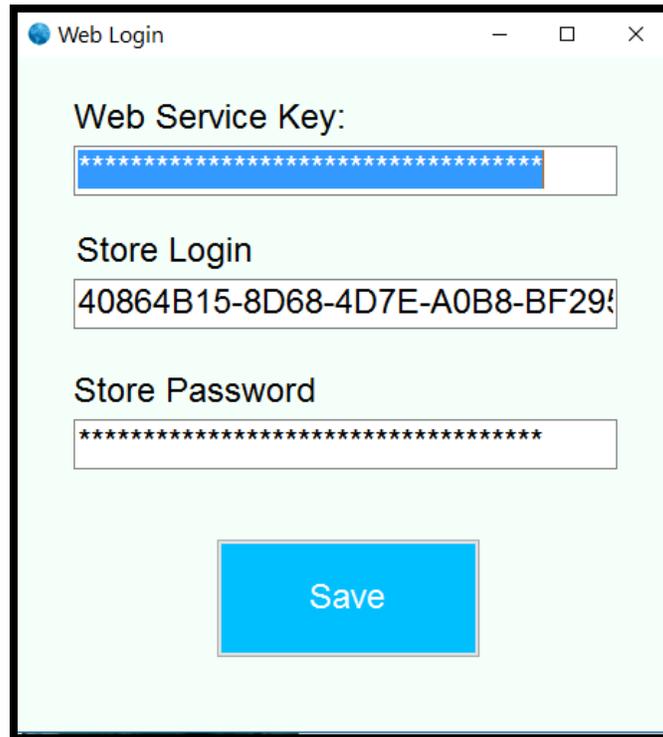
- If you require more than 1 Tender Type, add the ones you would like to use as well. Remember SellWise has a limit of 15 tender types total that can be used.

## 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**.



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

Modern Retail

Login Information

Update Pricing 60 Mins ▾

Update Qty On Hand 30 Mins ▾

Add New Inventory Items 60 Mins ▾

Get Transactions 15 Mins ▾

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

Start Time 09:00 AM ▾

End Time 06:00 PM ▾

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

Start Time 09:00 AM ▾

End Time 06:00 PM ▾

Stop Clean Up Save Settings

	Process	Call Between	Status Message
▶	Get Transactions	9:00 AM-6:00 PM	Automatic: 5/3/2017
	Update Inventory	9:00 AM-6:00 PM	Automatic: 5/3/2017
	Get Transactions	9:00 AM-6:00 PM	Automatic: 5/3/2017

## Online Orders to Process in the POS:

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

The screenshot shows the CAP POS interface. At the top, it displays 'CAP POS', 'www.capretail.com', 'Wednesday, May 3, 2017', and 'Station 1'. The main interface is divided into several sections:

- Top Navigation:** PriceCheck, Quantity, Item, Name, and a menu icon.
- Customer Information:** Qty = 1, Valued Customer.
- Transaction Table:** A table with columns: Qty, Item ID, Description, Price, Total.
- Bottom Left:** Sales Clerk HELLO, Printer ON, Sub Total, Tax, Total.
- Right Panel (Operations Menu):**
  - Configuration, Calendar, Cancel
  - Transaction: Ship To, Find Transaction, Suspend, Find Suspended, Online Order
  - Money: Internal Use, Paid Out, Dollar Amt., Gift Card
  - Special: Layaway, Layaway PullUp, Layaway Payment, EBT, ROA
  - Output: Cash Drawer Report, Drawer Count, Quote, Find PickList, Work Order
  - Cash Check

- 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.

Pull Up Invoice

Click on Header to Sort

Name	Reference	Type	Date	Time	Sales Code	Total
Smith, Robert	34524	Internet	05/04/2017	12:01 PM W		435.00
Johnson, Larry	34527	Internet	05/04/2017	12:01 PM W		119.33

Search Grid for Customer Name

Accept

Esc Exit

Delete

Print PickList

Print Grid

Page Up

Page Down

CAP POS www.capretail.com Thursday, May 4, 2017 Station 1

PriceCheck Quantity Item Name

Qty = 1 Robert Smith

34524

Qty	Item ID	Description	Price	Total
4	XPS451 9HW	MICHELIN 451 9HW	400.00	1600.00
1	9991050	Web Shipping Fee	7.00	7.00

5 Item(s)

Sales Clerk HELLO

Printer ON

Sub Total 1607.00

Tax 132.00

Total 1739.00

CAP - TEST

POS 9 CAP Software

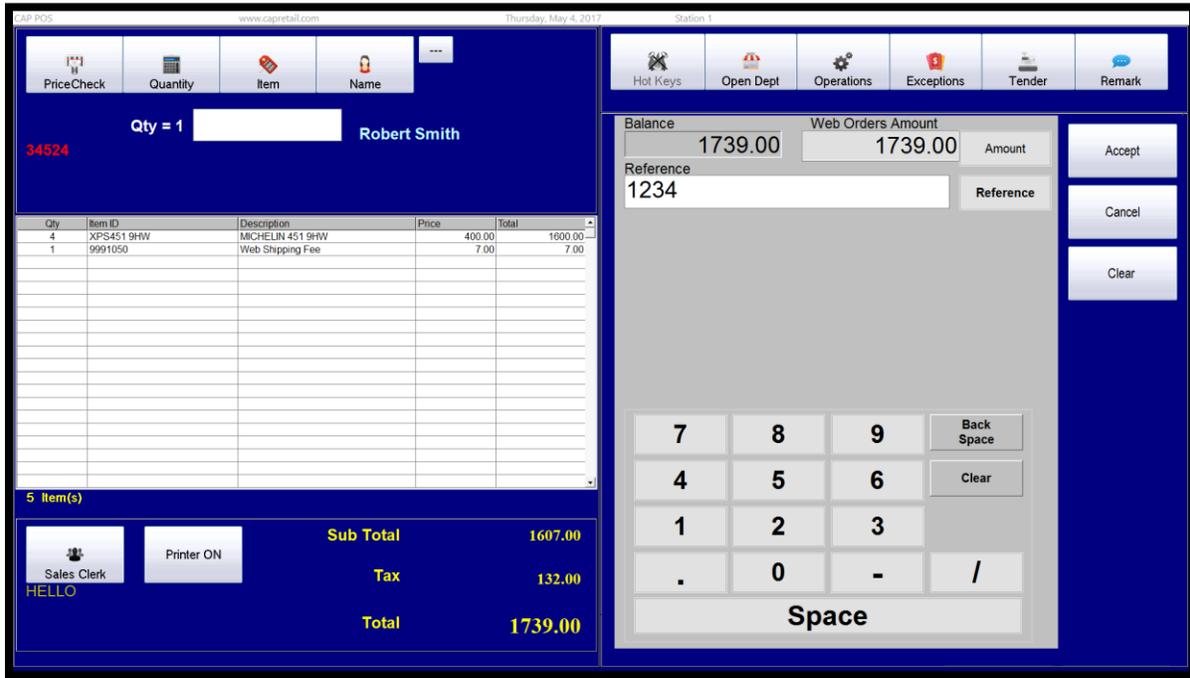
\$1 \$5 \$10 \$20 \$50 \$100 Exact Change

Cash Check Credit Card Debit Web Orders

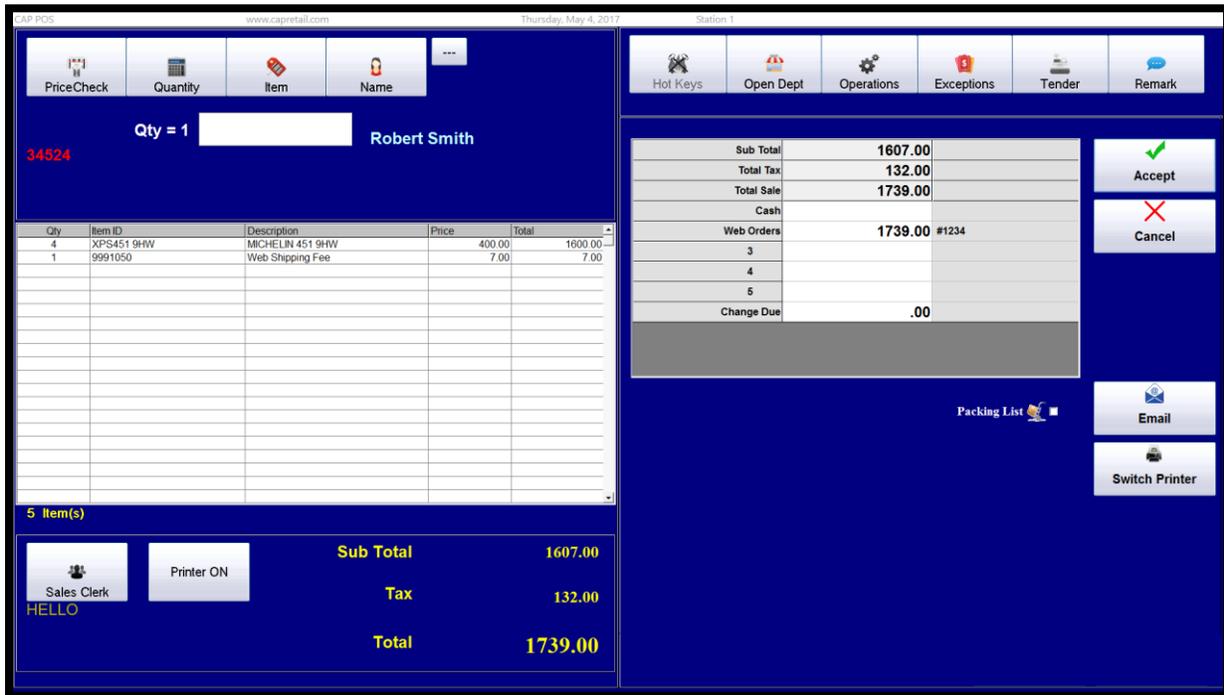
On Account

Shopping Cart Help

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.
- 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.

5/5/2017 1:02:18 PM Page 1

CAP - TEST  
Tender Type Summary Report  
From 5/4/2017 To 5/4/2017

Description	Quantity	Amount	Sub Total
Cash	2	310.07	
Web Orders	5	5,543.62	5,853.69
<b>Grand Total</b>	<b>---</b>	<b>5,853.69</b>	