



Setting Up & Selling Memberships

"GETTING STARTED GUIDE"

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Important Notes:

The majority of the Membership features within this document are specific to SellWise Pro 8.

Configuration Setup:**Store Settings-**

1. Open **CAP SellWise Pro 8**.
2. Within the SellWise Pro toolbar, select **Help → Configuration → Store Settings**.
3. Within Store Settings in the 'NAMES' section, set **Membership Tracking** to **Yes**. (Please see image below)

NAMES	
Prefill information on new Name (City,State,FrequentBuyer etc)	No
Default A/R Code	Phone #
Use Template for Name's Notes	Yes
Show Consolidated Account Balance in Names	No
Verify Balance before Displaying Record in Names	Yes
Verify Consolidated Sales on name before Displaying Record	No
Allow Receive on Account Through Names Screen	Yes
Show Serial Numbers on Names Sales History	Yes
Include Remarks on Names History Reports	Yes
Membership Tracking	Yes

Important Notes:

- Steps 4 and 5 (below) are optional and only necessary if membership cards will be created.
- A MSR and/or barcode scanner must be programmed with an ending carriage return for this to work.
- The card values must be included as a Business Name and/or an AR Code in CAP SellWise Pro.
- Swiping/Scanning membership cards will add the customer's name to the POS.

4. Within Store Settings in the 'POS' section, set **Swipe Name ID Card on Main POS Screen** to **Yes**.
5. Within Store Settings in the 'POS' section, enter the symbol that the membership card starts with in the **First Char of Name Swipe**. This will configure the ID Card Identifier. For example, the card number is ;12345?, the identifier in the example is a ;. (Please see image below)

POS	
Mandatory Name Selection When Selling	No
Credit Limit Active	Yes
Sell by Order(for 'Point of Sale' or Purchasing)	Stock Locator,Item ID, UPC
Price Method	Best Price
Allow Discounts on Mix 'n Match, Quantity and PromoPrices	No
Warn if Sale drops below cost	No
Allow Price Level to Exceed Current Retail Price	Yes
Discount Button 1 - Button Caption(max length 10) Discount%	
Discount Button 2 - Button Caption(max length 10) Discount%	
Discount Button 3 - Button Caption(max length 10) Discount%	
Discount Button 5 - Button Caption(max length 10) Discount%	Cost Plus
Swipe Name ID Card on Main POS Screen	Yes
First Char of Name Swipe	;

6. **Accept** changes and **Cancel** from Store Settings.

Membership Types-

1. Within the main Configuration page, select **Membership Types**.
2. **Add** all membership types that the business will be using and selling. Please note, the description added to Membership Types will need to be the same description that will be added to the membership inventory item. Please see the *Inventory Setup* section of this document for further instruction. (Please see image below)

Ref #	Membership Type
1	Gold
2	Silver
3	Guest
4	Lifetime

3. Once a new Membership Type is added, press **Accept**. Continue to **Add** and **Accept** new Membership Types if necessary. Once finished adding the Membership Types, select **Esc Cancel**.

Departments-

1. Within the main Configuration page, select **Departments**.
2. **Add a Department** named, "**Membership**" within the *Department Name* field and press **Accept**, then **Cancel** from Departments. It is not necessary to enter a *Tax Code* or *Profit Margin %*, as this is only used for open departments. (Please see image below)

Department	Sub-Department	Class
079	000	000
Membership		

Tax Code Profit Margin %

Age for Sales of Restricted Products
 Enter Age Years

Sales Commission Rate for eligible Employees
 (this overrides commission set on Sales Code)
 %

NOTE: An entry of 0% means no commission will be paid on any item in this Department.
 Values set at Dept Level will be applied to Sub-Depts and Classes

Phone/Shipping/Lottery/Miscellaneous-

1. Within the main Configuration page, select **Phone/Shipping/Lottery/Miscellaneous**.
2. Within Phone/Shipping/Lottery/Miscellaneous in the 'Other' section, set **Membership Department Code** to the appropriate Membership Department created from the *Departments* section of this document. (Please see image below)

Other	
Stock Locator used for Line Remarks	31
Membership Department Code	079.000.000
Rental Department Code	075.000.000
Fintech Customer ID	4444
Shopping Cart Download Format File	None
Email Daily reports to	scott@capretail.com
Show Change in Tendered Currency	Yes

3. **Accept** changes and **Cancel** from Phone/Shipping/Lottery/Miscellaneous.

Station Settings-

1. Within the main Configuration page, select **Station Settings**.
2. Within Station Settings in the 'POS Display Options' section, set **When Name Selected Show** to **Membership Information**. (Please see image below)

POS Display Options	
Select POS Display Screen	Multi Touch POS
Select Quick Key Set	
Show Special Keys on Main Screen as	Special Keys
Default POS Lookup: Inventory List	Description
Default POS Lookup: Name List	Last Name
Use Larger keypad for POS Lookup Lists	No
Select Display for Name Detail: Limited(faster)or All Details.	Limited
Select Display for Inventory Detail: Limited(faster) or All Details.	Limited
Show Keyboard on POS Name and Item Lookups	Yes
Display Department List when Open Department Selected	Yes
Display Item Cost on Inventory Lookup	Yes
Select Style for POS	CustomColor
Custom Colors for POS	
Use Candy Buttons on Main POS	Yes
Show on account sales on POS Cash Drawer Report	No
When Name Selected Show	Membership Information
Display Selection Bar on Break Pack Items	Yes
Main POS Picture	C:\Users\Scott\Desktop\my cap logos\image2.jpg

3. **Accept** and **Cancel** from Station Settings and then **Exit** from the main Configuration page.

Inventory Setup:

1. Within the CAP SellWise Pro toolbar, select **Inventory**.
2. It is necessary to **Add New Items** for all Membership Types that have been created. (i.e., one Inventory Item per each Membership Type)
 - A. From the **Main** tab, set the appropriate **Membership Department**.
 - B. From the **Main** tab, set the appropriate **Membership Period**.
 - C. From the **Additional Information** tab, set **Non Decrementing** to **Yes**.
 - D. Add all other pertinent information necessary for the business.
3. **Accept** then **Esc Cancel** from the Inventory module. *(Please see image below)*

Stock Locator 728. Description **GOLD** 537
 Vendor Item # Gold Sub-Description
 Non-Decrementing Item UPC(s)
 Unit of Measure Ea - Each

Main Additional Information Messages

Cost/Price
 Current Cost 30.00 Margin 33.33 %
 Actual Cost 30.00 Markup 50.00 %
 List Price 45.00
 Sell Price

Tax Code A 6.25% Volumetric Tax \$
 Vendor
 Alt. Vendor
 Dept Code Dept --Sub Dept-- Class
Department 079.000.000 Memberships
 Membership Period Month

Ordering Information
 On Hand 0 Maximum 1
 On Order 0 Minimum 0
 Qty / Pack 1 Has Sold No
 Re-Order No Last Sold

Stock Locator 728. Description **GOLD** 537
 Vendor Item # Gold Sub-Description
 Non-Decrementing Item UPC(s)
 Unit of Measure Ea - Each

Main **Additional Information** Messages

Pricing Options
 Price Levels
 Promo Prices
 Quantity Prices

Kit Item
 Kit Kit Plus
 Add Kit

Matrix
 Matrix Root Matrix Item
 View Matrix

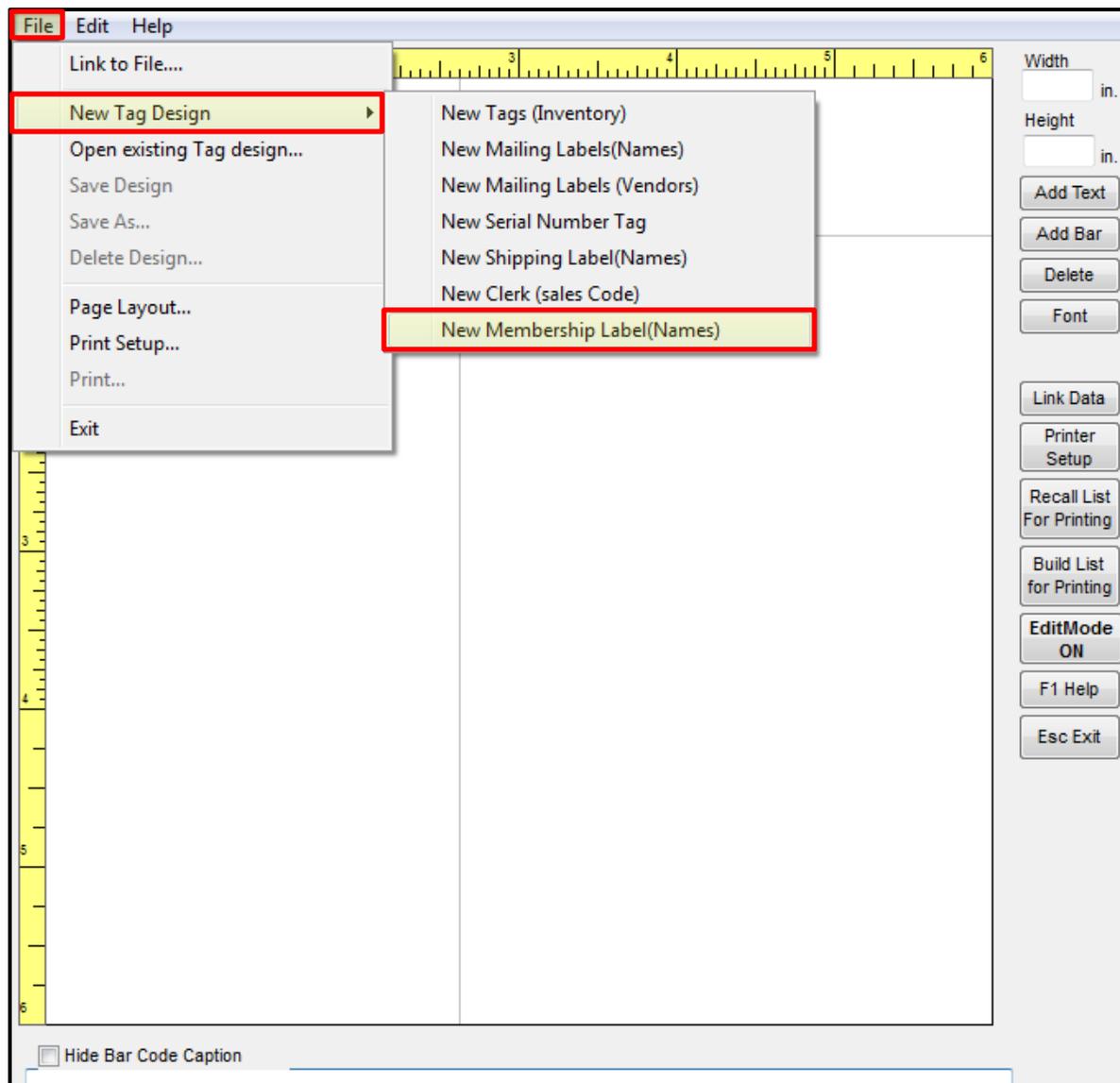
Serialized Item
 Serialized No View Serialized View Warranty

Food Stamp No
 Sell by Weight No
 Sell by Dollar Amount No
 Discounts Allowed Yes
 Web Enabled No
Non Decrementing Yes
 FSA Eligible
 Sign. Required FSA No
 Commissionable Yes
 Verify Age years

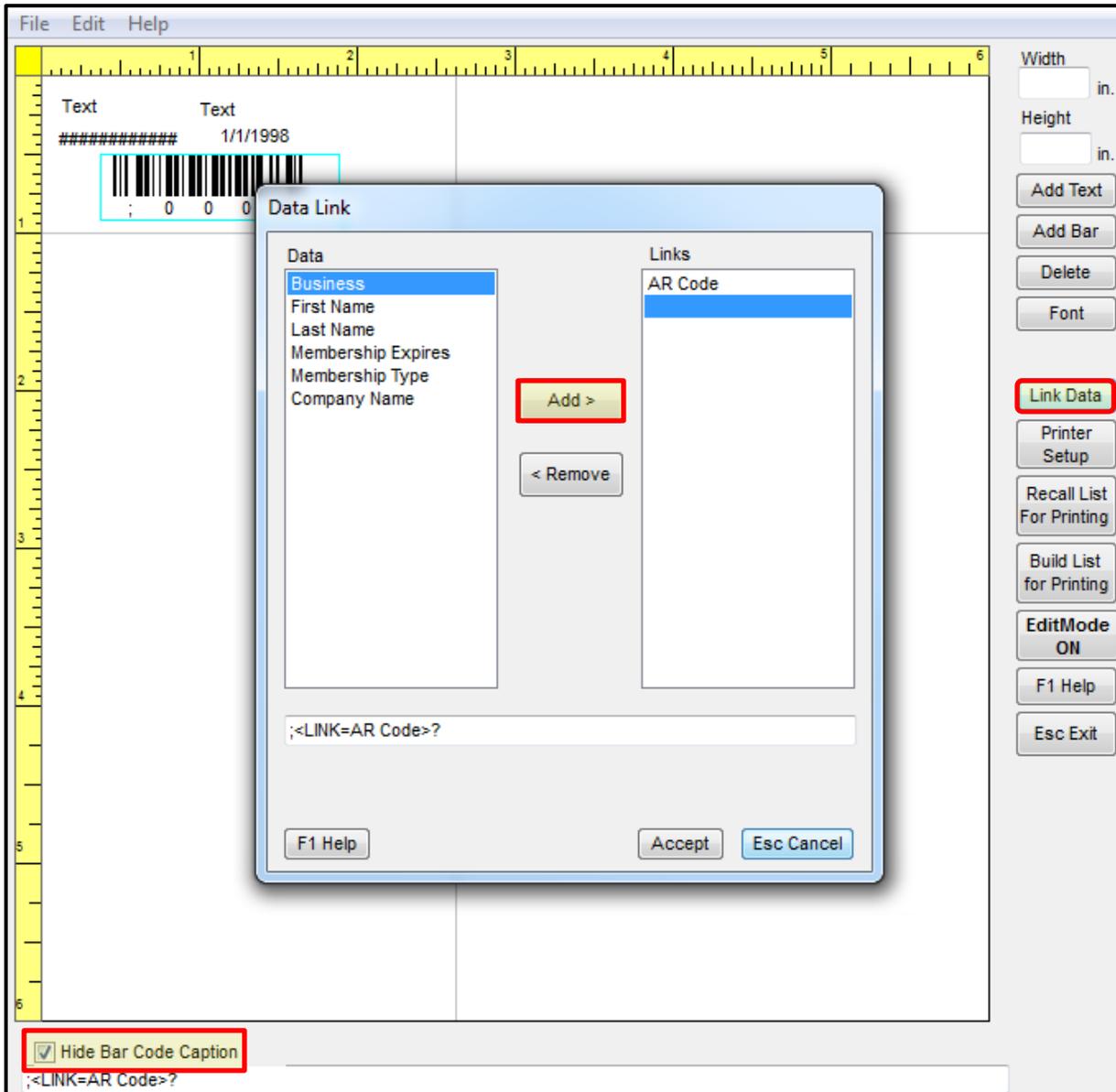
Mix 'n Match Code View
 Break Pack Link to SL
 Item Link to SL
 Stock Link to SL
 Add Picture
 Remove Picture

TAGS Setup:

1. It is necessary to create a Membership tag if the business will be printing barcodes which allows merchants to swipe/scan members at the POS.
2. Within the CAP SellWise Pro toolbar, select **Tags**.
 - A. From the Tags module, select **File** → **New Tag Design** → **New Membership Label (Names)**. (Please see image below). If there are existing Tags, select **Create New Tag**.



- B. **Add and Link Data** appropriate for the printed Membership tag. Please note, it is necessary to link a barcode to the **AR Code** or **Business**.
- C. Select **Hide Bar Code Caption**. (Please see image below)

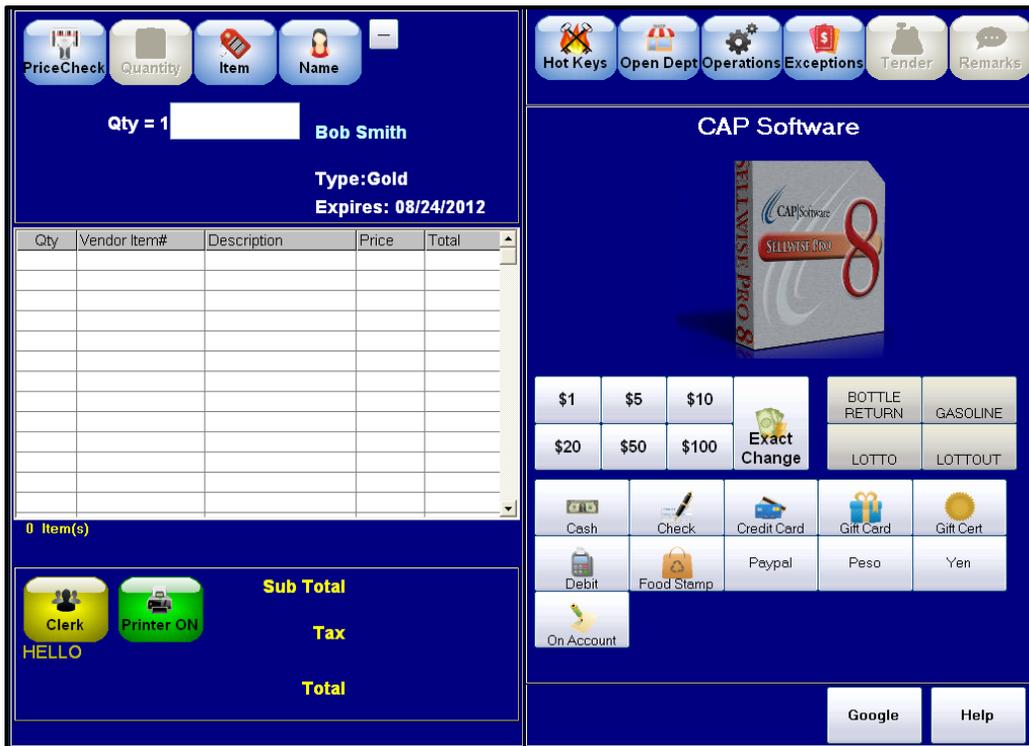


- 3. **Accept** then **Esc Exit** from the Tags module and select **Yes** to **'Save Changes.'**

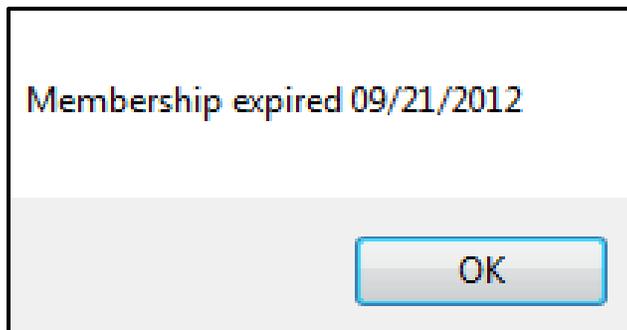
POS:

Adding a Membership Name to the POS-

1. Open **CAP POS** by selecting **POS** from the SellWise Pro toolbar or by double-clicking the **CAP POS** icon on the desktop.
2. In order to add a name to the sale, please do one of the following:
 - A. Select **Name**, click to select/highlight the appropriate name and press **Accept**.
 - B. Simply scan the Membership tag for the name to be added. Please note, if the customer has an existing membership, their Name, Membership Type and Expiration Date will show on the main POS screen. *(Please see image below)*



- C. If a Membership tag is scanned and the membership is expired, an alert will appear advising the date the membership expired. Select **OK** and renew the membership if desired and complete transactions as normal. *(Please see image below)*



Selling a Membership in the POS-

1. Open **CAP POS** by selecting **POS** from the SellWise Pro toolbar or by double-clicking the **CAP POS** icon on the desktop.
2. Select the appropriate **Name** to attach to the sale as well as the appropriate Membership **Item**. If the customer's name does not exist, please add that information at this time.
3. Add additional items to the sale if necessary and choose the appropriate **Tender** to complete the sale. *(Please see image below)*

Qty = 1 **RADIO STORE**
Laura Montgomery

Qty	Item ID	Description	Price	Total
1	Gold	GOLD	45.00	45.00

1 Item(s)

Sub Total	45.00
Tax	2.81
Total	47.81

Sales Pers HELLO Printer OFF

CAP Software

SELLWISE PRO 8

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

Cash	Check	Credit Card	Debit	Gift Card
Gift Cert	Food Stamp	Pulse Pay	Paypal	FSA
Online Order	On Account			

Pack / Single Help

Important Notes:

When a membership is sold, the Name record will automatically update to include the Membership Type and Expiration Date of the membership sold if the following conditions are met:

- Membership Type must exactly match the Inventory description.
- Inventory items sold must be set to the appropriate membership department.
- The customer Name must already exist in the database.

Names:

1. Within the CAP SellWise Pro toolbar, select **Names**.
2. Select the appropriate name that the membership was sold to and select **Change**.
 - A. From the **Sales and Pricing tab** within the 'Club/Association' section, **Member** will automatically change to **Yes** once the customer purchases the membership in the POS.
 - B. Select the appropriate membership **Type**.
 - C. The software automatically sets **Expires** to the appropriate expiration date that is setup within the Inventory module once the customer purchases the membership in the POS.
 - D. The software greys out **Since** as this is the date the customer was originally added to the Names database.
 - E. From the **Sales and Pricing tab** within the 'Recurring Payments' section, set the appropriate recurring payments if necessary.
 - F. Add all other pertinent information necessary for the business.
3. **Accept** then **Esc Cancel** from the Names module. (Please see image below)

Business RADIO STORE		A/R Code 5556667777	Customer Since: 10/09/2012
Title	First Name Laura	Last Name Montgomery	Change Item
Contact Information		Sales and Pricing	Shipping Address & Messaging
Sales Date of Last Sale: 10/9/2012 Total Sales: 45.00 <input type="button" value="View Sales History"/>		Accounts Receivable Credit Limit: .00 Payment Terms: None Last Statement Date: Balance: .00 Minimum Payment: % <input type="button" value="Account History"/>	Special Pricing Options Price Level: Price Level: Discount: 0 % Sell at Cost Plus: % Frequent Buyer: No
Tax Information Tax Code: Item Tax TaxID:		Club/Association Member: Yes Since: 10/19/2007 Type: Gold Expires: 11/9/2012	
Recurring Payments Charge Description: Amount: Charge C. Card: Date next Charge: 10/9/2012 Frequency: Not Selected No			
<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	<input type="button" value="Esc Cancel"/>

Reports:

1. Within the CAP Software Pro toolbar, select **Reports**.
2. Select **Membership** within the 'Customer' section.
3. Select the appropriate report to run within the **Include** section (**Active**, **Expiring before Date Specified**, **Expired** and/or **All**).
4. Select the **Membership Type** to show in the report (if not **All Memberships**).
5. Select how to sort the report in the **Sort by** section (**Name**, **Expiry Date** or **Type**).
 - A. Running an **Active** report shows every customer with an active membership.
 - B. Running an **Expiring before Date Specified** report, shows every customer with the specified membership selected within the expiry date selected. Make sure to choose the appropriate Membership Expiry Date.
 - C. Running an **Expired** report shows customers with expired memberships.
 - D. Running an **All** report shows all customers with active and expired memberships.
6. Once the merchant selects the appropriate report to run, press **Accept**. *(Please see image below)*

The screenshot shows a dialog box for configuring a report. It has a title bar with the word "Include". Below the title bar are four radio buttons: "Active", "Expiring before Date Specified", "Expired", and "All". The "All" radio button is selected. Below the radio buttons is a text field labeled "Membership Expiry Date" with the value "10/9/2012" and a dropdown arrow. To the right of this field is a checkbox labeled "Group by Membership Type or Select". Below this checkbox is a dropdown menu with the text "All Memberships" and a downward arrow. Below the "Membership Expiry Date" field is a section titled "Sort by" with three radio buttons: "Name", "Expiry Date", and "Type". The "Name" radio button is selected. At the bottom right of the dialog box are two buttons: "Accept" and "Cancel".

