CAP SELLWISE PRO 7- RETAIL MANAGER

"GETTING STARTED GUIDE"

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CHAPTER 1

INSTALLING AND UPDATING

CAP software is distributed on CD through an international dealer channel. Insert the CD and select the software to install. It is important that *no programs be running* when installing software. This may prevent new files from updating older ones.

Uninstall older versions of the software before beginning the install. Select Start, Settings, Control Panel, and Add/Remove Programs. Select the software, e.g., CAP Software, then click Remove.

The **Installation Wizard** gets the essential information during the first install. The CAP Installation Wizard will guide you during the initial installation. Insert the CAP Software CD and Auto run displays the main menu. Select Install Products. Install Pervasive SQL 10 first and then SellWise Pro 7*. *Btrieve applications will not run on this computer after SQL V8 is installed. Also, if you already have Pervasive installed and are just upgrading, DO NOT INSTALL the new Pervasive version.*
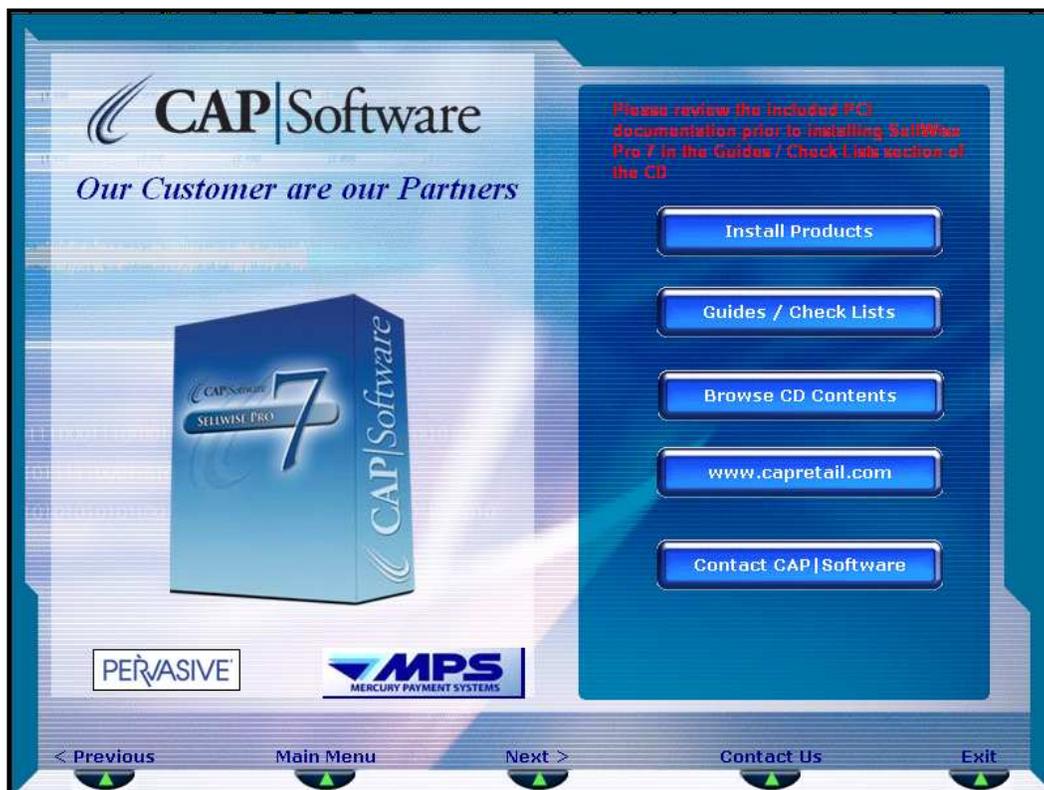
CHOSE "INSTALL PRODUCTS", THEN INSTALL "PERVASIVE SQL 10" AND "SELLWISE PRO 7"

CAP INSTALLATION WIZARD
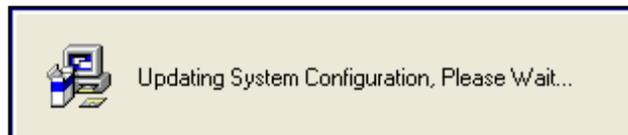
ESSENTIAL INFORMATION IS OBTAINED BY THE WIZARD
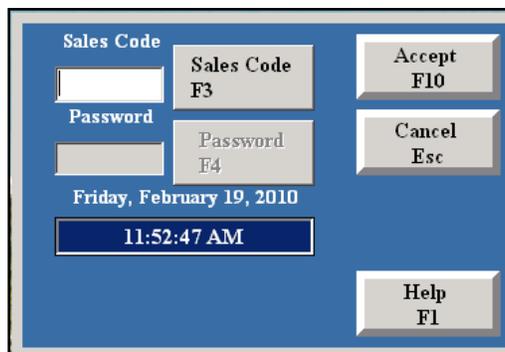
YOUR SALES CODE IS HELLO OR H THE FIRST TIME

CHAPTER 2

CHECKLIST FOR GETTING STARTED

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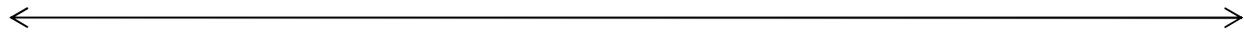
Make these settings by selecting "Help" and then "Configuration".

_____ **Register your Software**

_____ **Taxes**

_____ **Store Settings**

_____ **Phone/Shipping/Lottery/Miscellaneous**

_____ **Invoices & Receipts**

_____ **Configure Station Hardware**

_____ **Configure Printers**

_____ **Configure Tenders**

_____ **Sales Codes and Security**

_____ **Department Codes**

_____ **Internal Use**

_____ **Additional Information Fields**

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Exit "Configuration" and from the "CAP Retail Manager" toolbar, select "Vendors"

_____ **Add Vendors**

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Exit "Vendors" and from the "CAP Retail Manager" toolbar, select "Inventory"

_____ **Add Inventory** - Please read the help on setting up Descriptions for ease of lookup

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_____ **Other Software** - Install optional CAP products, payment processing,
accounting software and links.

_____ **Be Safe** - Verify that data is backed-up daily, use UPS (Battery Backups) on
each computer and prevent virus attacks.

………………………………………………………………………………………………….

_____   _____
Dealer Name   **Phone Number**

www.CAPretail.com, Sales@CAPretail.com, Support@CAPretail.com
(800) 826-5009, Monday through Friday
8:30am-5:30pm Central Time, Except for FedEx and UPS Holidays

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CHAPTER 3

ENTER YOUR BUSINESS INFORMATION

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Essential information about your business is obtained by the Installation Wizard. Maintain settings using Configuration. Select *Help* from the CAP Menu Bar. Select *Configuration* from the Pull Down List. Verify these settings for your business. Prior to any customization though, you must register your user license for the software.

REGISTER YOUR SOFTWARE

CAP Software must be registered before your business information and other printing operations will perform properly.

- Your dealer issues registration numbers upon receiving payment.
- If you are a **First-Time User**, you will be prompted to enter your registration prior to being able to open anything.
- If you are a **Current-User Upgrading**, you will need to select "Help", then "Configuration" and finally "Registration".

REGISTER YOUR SOFTWARE TO PRINT YOUR BUSINESS INFORMATION

SALES TAX
Select "Help", then "Configuration" and "Taxes". The screen for setting tax appears.

CAP Configuration - Taxes		
Tax Rate A	6.25	%
Tax Rate B	0	%
Tax Rate C	0	%
Tax Rate D	0	%
Tax Rate E	0	%
Is Sales Tax Based on Location of Residence?	No	
Second(Additional)Tax Rate	0	%
Label for Second Tax (eg GST)		
Search Sub-Description for Second Tax Amount	No	
used for Advanced Dep. Fee or Volumetric Tax		
No Tax on sales below $	0	
Tax Adjustment	0	e.g. -0.01
Round Tax up at 3rd Decimal	No	
Calculate Tax on	Total	
Break Point at which tax changes $	0	
Tax Rate for amounts above Break Point	0	%
Use Ohio Tax Tables	No	

F1 Help   Edit Location Tax Table   F10 Accept   Esc Cancel

SALES TAX SETTINGS

Each setting is explained in the help for Configuration. Most states in the USA will set:
- Sales Tax Rate A: 8.25%
- No Tax on Sales Below: .20
- Round Tax Up at 3rd Decimal: No
- Calculate Tax on: Total

In this example, the tax is 6.25% on the total for sales of at least 20 cents.

STORE SETTINGS
GST - GOVERNMENT SERVICES TAX
Select "Help", then "Configuration", and "Store Settings". Select the country from the list of:
United States, Australia, Canada, Dominican Republic, Ghana, Jamaica, New Zealand, Trinidad and United Kingdom.

Country	United States ▼	
POS	Australia	
Mandatory Name Selection When Selling	Canada	
Credit Limit Active	Dominican Republic / Ghana	
Sell by Order(for 'Point of Sale' or Purchasing)	Jamaica	
Price Method	New Zealand	
Allow Discounts on Mix 'n Match, Quantity and PromoPrices	Trinidad / United Kingdom	

SELECT COUNTRY FROM THE PULL DOWN LIST

- GST affects POS, Inventory, Purchasing, Tags and Configuration.
- The price is always displayed with tax included.
- Cash tendered is rounded down to the nearest nickel.
- The Inventory screen has an additional field for the selling price including tax.
- Purchasing and Tags have options to include the tax in the selling price.

DATE FORMAT - US OR EUROPEAN

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Select "Help", next "Configuration", then "Store Settings", and "Date Format".

Order of Lookup: Vendor list	Business
Date Format	United States
Country	United States
POS	European

<div align="center">

SELECT UNITED STATES OR EUROPEAN

</div>

For example, the 21st day of March, 2010 (The first day of spring) is formatted:

United States	European
03/21/2010	21/03/2010

PRINTER SETUP
Select Configuration and Printer Setup to define the printer type, model and which print jobs are assigned to it. Check the certified hardware list at www.CAPretail.com. Install OPOS Drivers when required.

CERTIFIED HARDWARE- PART 1 (SEE PAGE 13 FOR PART 2)
CAP recommends using certified hardware provided by your dealer. We cannot emphasize enough how much time and expense is wasted by trying to use hardware that has not been certified or by using an old computer to save a few dollars. Please understand that it is *more expensive* as well as very *frustrating* in the long run.

Trust your dealer to be responsible for the complete system:
   Hardware, Software, Integration, Installation, Training, and On-going support

Hardware settings found through the path: "Help", "Configuration", and "Station Hardware".

INVOICE AND RECEIPT OPTIONS

Select "Configuration" and "Invoices & Receipts" to control what prints on receipts and how it will look.

CAP Configuration - Invoice & Receipts	
Print Company Name	No
Print Company Address	Yes
Print Company Phone Number	Yes
Print Company Web Address	Yes
Print Company Email	No
Print Sales Code	Yes
Print S/L or Item ID	S/L
Discount Message Style	You saved $$$
Allow >1 Line per Item	Yes
Print Sub-Description	No
Print Kit Contents	Yes
Print Station Number	Yes
Print Store Number	Yes
Print Invoice Number	Yes
Print Extended Description	No
Print Sold to A/R Code	No
Print Sold to Phone #	No
Print Sold to Last Name	Yes
Print Sold to First Name	Yes
Print Sold to Business	Yes
Print Sold to Address	Yes
Print Balance Due	No
Print Receipt # as BarCode	No

INVOICE AND RECEIPT OPTIONS

TENDER SETTINGS
Select Configuration and Tender Types to configure your forms of payments.

Tender Description	Tender Type	Open Drawer?	EDC?	Print Receipt?	S/L or Exchange Rate
On Account	On Account	No			
Cash	Cash	Yes	No	Yes	
CHECK	Check	No	No		
FSA	FSA	Yes	No	Yes	
Visa	Credit Card	No	No	No	

| F1 Help | F4 Add | F6 Change | F5 EDC | F10 Accept | Esc Cancel |

SELECT THE TYPES OF PAYMENTS THAT YOU ACCEPT

- Click "Yes" to open the cash drawer for Cash and others that you want.
- Select "EDC" (Electronic Draft Capture) for the types that can be paid by Credit Card.
- Only the types set to "Yes" appear when a sales is made.

User Defined Tender Types

Note the ability to "Add" User Defined Tender Types. You can enter a title for these by double clicking. The resulting button will have an associated key so you can choose the type with keyboard. Examples include: Gift Certificate, Store Coupon, etc.

If the title is too long, the Functional Key name (ex. F6) will be pushed to the third line and will not be visible. Shorten the name until the key is visible below the title.

TITLES ARE TOO LONG SO "F6" DISAPPEARED

SHORTER TITLES LEAVES ROOM FOR THE FUNCTION KEY LABEL

Now users of this system would be able to select F5 for Gift Certificate and F6 for Coupons.

DEPARTMENT CODES

Before adding inventory, verify that the department codes are the ones you need. There are 94 possible codes since any character on the keyboard can be a code. The description, though, can only be 20 characters long and that is how you remember the department.

Select "Help", "Configuration" and "Department Codes".
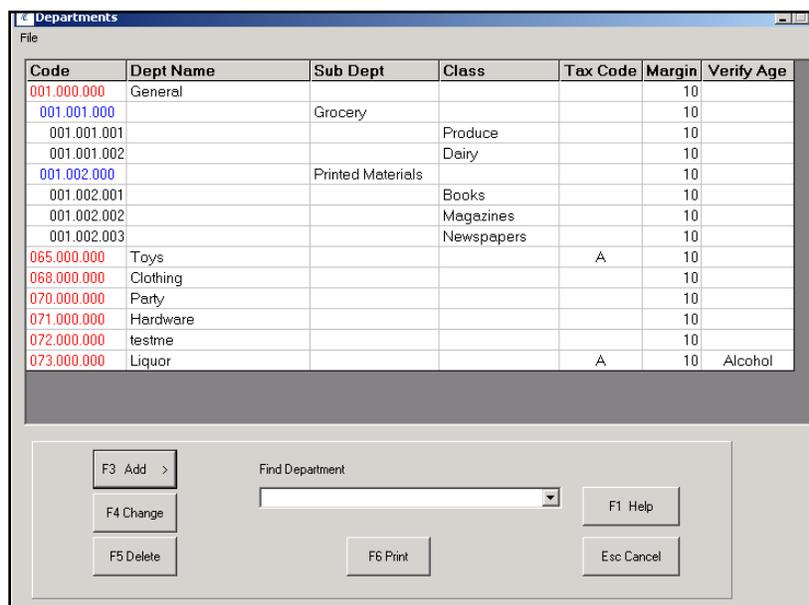
DEPARTMENT CODE MANAGEMENT

VENDORS

Before adding inventory, verify that the Vendors are in the database for the items you're adding. You will need the Department Code and Vendor Code to properly add items. Select "Vendors" from the "CAP Retail Manager" main toolbar.

INVENTORY

An inventory file that is set up properly and is accurate makes things go very smooth in the store. Add the information using vendor invoices or packing slips so that you have the correct cost and price for each item.

The best method for getting the Inventory on line and keeping it current is to use the data from your vendor if it is offered on disk.

SALES CODES AND SECURITY

Sales Codes are used to login, record clock in and out times, and to restrict access to operations and information.

Select "Help", then "Configuration" and "Sales Codes and Security".

*Set security and permissions for **each sales code** to control the access of each person to operations and information.*

CHAPTER 4

RECOMMENDED SAFE OPERATIONS

PRACTICE

You can practice and train clerks and office managers before beginning to use the system. Prior to going live, you need to do a "physical count" to get the quantities correct. Void the sales transactions entered during practice so that sales reports will be correct.

GOING LIVE

Begin store operations. Capture data at the POS and get the answers you need in the back office. Follow the recommended safe practices to protect your data from loss and your system from electrical power problems, loss of performance and virus invasion.

USE YOUR CAP DEALER

Focus on your business, which is what you do best, and let your dealer take care of your system.
Ask your dealer to Backup your Data, protect the system form Electrical Power surges or loss, provide Virus Protection, and do Regular Tune-ups.

BACK UP YOUR DATA!

Your data is the most valuable part of the system. You can always buy a new computer and hardware in the event of a loss. But a real disaster is the loss of your data. Be sure that you have a system for backing up the data daily and frequently *saving a copy at another location*. Ask your dealer to help setup and maintain a safe and reliable system of data backup.

CAP Backup is now available to backup your data ON and OFF site. Call CAP or your dealer for details of the most safe and reliable way to protect your priceless data.

ELECTRICAL POWER

Electrical power, while you can't see it, can cause problems that are hard to analyze. In most areas power rarely goes completely off. It can, however, fluctuate slightly. These variations may not be visible but can cause system performance problems. Fluctuations may be caused by large motors (air conditioners, freezers, etc.) in your or your neighbors building. A simple, low-cost, solution is a UPS (Universal Power Source) for each computer. This is also known as a backup battery. Your dealer can assist you.

VIRUS PROTECTION

Virus attacks are becoming more common. The only sure way to never have a virus is to not let any files be copied to your system, either by disk or through an Internet connection. Most systems will need some form of regular, scheduled, scanning for viruses. Ask your dealer to help. CAP Software recommends the NOD32 Virus Protection from www.ESET.com.

TUNE UPS

System performance can deteriorate with time and use because of fragmented files, operating system memory leaks, hard drive flaws and data corruption. Contact CAP Support for a suggested schedule for you to perform monthly system Tune-ups on your computers.

CHAPTER 5

TIPS

CERTIFIED HARDWARE-PART 2

CAP gets hardware from trusted manufacturers and test it with our software. We verify that all the components install and perform as intended. Make your install go smoothly and avoid the blame game by only using hardware that has been tested and certified for use with CAP software.

- The list is maintained as www.CAPretail.com.
- Select the "Support" tab, and CAP Certified Products & Hardware.

LINK TO HARDWARE TESTED AND CERTIFIED BY CAP

MULTIPLE HELP OPTIONS

1.) On **www.CAPretail.com,** the Support link has the "Install" and "Download" Tabs which contains PDF files and Tutorials to help understand various components.
2.) The **CAP Software CD**
3.) **CAP Help** can be accessed under the "CAP Retail Manager" Toolbar
4.) **F1** can be pressed while in various parts of the program for quick reference.
5.) **Automation Pays! –** CAP Software's Retail Guide- Contact CAP for Ordering Information.
6.) **Local CAP Dealer**

CAP HELP FILES

Also, you can access the Help Files from the "CAP Retail Manager" Toolbar, and then select "Contents" for another resource.

HELP MENU

The Selections within the Help Menu Include:
- **Contents -** The list of topics in the help file.
- **Index -** An index of key words in the help file. This is very effective in finding what you want.
- **Back -** Go back to the previous help screen.
- **Print -** Print the help topic.
- **File -** Open a help file, print the topic or exit.
- **Edit -** Copy the topic to the clip board. It can then be pasted to a word processor. Annotate is a way of entering your own comments.
- **Bookmark -** Mark and comment on help file topics.
- **Options -** Keep help on top, display history of help topics selected, select the help text size and colors.
- **Help -** Display the version and copyright.

If you find a topic that you find particularly helpful, leave the modules open and minimized. It's easier.

F1
Press F1 or click the Help button to immediately get answers. This is faster than calling and is available all the time. This is an extensive and valuable resource to help you learn and use the software to optimize your business.
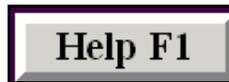
PRESS F1 FOR HELP

"Context-sensitive help was available using the F1 key from anywhere in the program, and the help program was extremely comprehensive and easy to use"
The CPA Software News Review

SUPPORT PLANS, WEB UPDATES, FTP SERVICE, SHOPPING CARTS AND TRAINING
- Support plans are key to easy support help. Call for the best support plan options.
- Your software can be updated with downloads if you have an Internet connection.
- CAP provides options to work with Internet Shopping Carts- call us for details.
- CAP Software offers training by phone, at our offices and at your site for additional fees.
- On-site support and training is provided, as an extra cost option, from your dealer.

CONTACTING CAP SOFTWARE

CAP SOFTWARE

4100 INTERNATIONAL PLAZA, SUITE 510
FORT WORTH, TX 76109

TOLL FREE PHONE NUMBER:
(800) 826-5009 or Sales@capretail.com

LOCAL OFFICE NUMBER:
(817) 560-8139

SUPPORT:
(817) 560-7007 or Support@capretail.com

WEBSITE:
www.CAPretail.com