

# SellWise User Group

Thursday, May 18, 2017

## Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



# User Group Topics

- New Backup Process – CAP Backup is LIVE!
- Changes to HCOM are coming
- Cost/Price Update Review
- PASSWORDS!
- Training – Adding Cash Receipt Items
- Most common CAP Service calls
- Updates



# Backing Up SellWise

- Do you have a data backup policy at your council?
- Are you backing up your SW directory daily?
- Do you have an odd looking “zip” drive
- Are you using multiple thumb drives?
- Is it really being backed up, securely?



# Backing up SellWise

- New (added cost) service available
- Scheduled backup daily
- Creates an encrypted file stored securely in the cloud
- Reviewed daily for success by CAP
- CAP will restore your system if you have a failure
- AVAILABLE NOW. \$225 per year.
- Contact CAP at 800-826-5009 or [bsaorders@capretail.com](mailto:bsaorders@capretail.com)



# HCOM Changes

- HCOM communicates by FTP today
- CAP is adding more security
- SFTP Protocol
- Data encryption
- Secure Transmission of all data (PII or other)
- CAP will contact you to schedule your update



# Cost/Price Update Review

- File is posted weekly by National Supply
- The file contains updates to existing items including: cost, price, and UPC.
- The file may also contain NEW items.
- The step-by-step procedure is highlighted in the Supplemental Procedures Manual available for download here:
- <http://www.capretail.com/bsasupport/>



# Cost/Price Update Review

- Download the file (Location?)
- Save it to the C:\SW\Maintenance folder
- Double-click the BSA Import icon on your PC
- Set 'File Import' to 'Inventory'
- Set 'Operations' to 'Council Price Update'
- Press 'Start' to run the process.



# Cost/Price Update Review

- When complete, a log file is saved in C:\SW called ccprice.log
- Open this file with Excel to view the items that have changed, along with any new items.
- Users should review this list to identify items that may need to be relabeled in the store
- Users should also insure they are counting their inventory using the correct numbers





# Sales Code Best Practices

- User lockouts are the #1 service call
- Write your password down and put it in the safe EACH time it changes.
- E-mail it to yourself.
- Create a generic Manager Sales Code and Password and put it in the safe
- If you lock yourself out, it will unlock after 30 minutes



# Training Time

- Cash Receipt Items



# SellWise – Cash Receipts

- To insure that items that are cash receipts (Department 90) are recording properly by checking:
  - Department – 090.000.000 Cash Receipts
  - Vendor Item – # use = , 6 or Non-Decrementing
  - Vendor – 90
  - Sub-Description – Account Number



# SellWise – Cash Receipts

- Open SellWise Pro 8
- Click on Inventory
- Highlight the column to search
- Enter information in the search box
- Highlight the item
- Click View Details



# Inventory Item

- Cross the top check the Vendor Item #
- Check under Vendor Item # for Non-Decrementing Item
- Check the Sub-Description for the correct account number



# Main Tab

- On the Main tab:
- Vendor Code – 90 Council is Vendor
- Department Code – 090.000.000 Cash Receipts



# Main Tab

Stock Locator	100021.	Description	YR ROUND TENT RENTALS	8046
Vendor Item #	=6490TENT	Sub-Description	1670249020	
	Non-Decrementing Item	UPC(s)		
Unit of Measur	EA - Each			

Main	Additional Information	Messages																																						
<p><b>Cost/Price</b></p> <table border="1"> <tr> <td>Current Cost</td> <td>0.00</td> <td>Margin</td> <td>%</td> </tr> <tr> <td>Actual Cost</td> <td>0.00</td> <td>Markup</td> <td>%</td> </tr> <tr> <td>List Price</td> <td>0.00</td> <td></td> <td></td> </tr> </table> <p><b>Ordering Information</b></p> <table border="1"> <tr> <td>On Hand</td> <td>0</td> <td>Maximum</td> <td>0</td> </tr> <tr> <td>On Order</td> <td>0</td> <td>Minimum</td> <td>0</td> </tr> <tr> <td>Qty / Pack</td> <td>1</td> <td>Has Sold</td> <td>Yes</td> </tr> <tr> <td>Re-Order</td> <td>No</td> <td>Last Sold</td> <td>02/12/2014</td> </tr> </table>	Current Cost	0.00	Margin	%	Actual Cost	0.00	Markup	%	List Price	0.00			On Hand	0	Maximum	0	On Order	0	Minimum	0	Qty / Pack	1	Has Sold	Yes	Re-Order	No	Last Sold	02/12/2014	<p>Tax Code Non Taxable</p> <p>Vendor 90</p> <p>Alt. Vendor</p> <table border="1"> <thead> <tr> <th>Department</th> <th>Dept Code</th> <th>Dept</th> <th>--Sub Dept--</th> <th>Class</th> </tr> </thead> <tbody> <tr> <td></td> <td>090.000.000</td> <td>Cash Receipts</td> <td></td> <td></td> </tr> </tbody> </table>	Department	Dept Code	Dept	--Sub Dept--	Class		090.000.000	Cash Receipts			
Current Cost	0.00	Margin	%																																					
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**Notes**



# Additional Information Tab

- The Non Decrementing is “YES”

Stock Locator: 100021. Description: YR ROUND TENT RENTALS 8046  
Vendor Item #: =6490TENT Sub-Description: 1670249020  
Unit of Measure: EA - Each UPC(s):

**Non-Decrementing Item**

Main	Additional Information	Messages
<b>Pricing Options</b> Price Levels Promo Prices Quantity Prices	EBT Eligible: No Sell by Weight: No Sell by Dollar Amount: No Discounts Allowed: Yes Web Enabled: No <b>Non Decrementing: Yes</b> 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
<b>Kit Item</b> <input type="checkbox"/> Kit <input type="checkbox"/> Kit Plus Add Kit		
<b>Matrix</b> <input type="checkbox"/> Matrix Root <input type="checkbox"/> Matrix Item View Matrix		
<b>Serialized Item</b> Serialized: No View Serialized View Warranty		

Notes

Help Add Change Delete History Accept Print Tag Cancel





# Common CAP Service Calls

- User lockouts
- General Ledger questions
- Configuration questions.



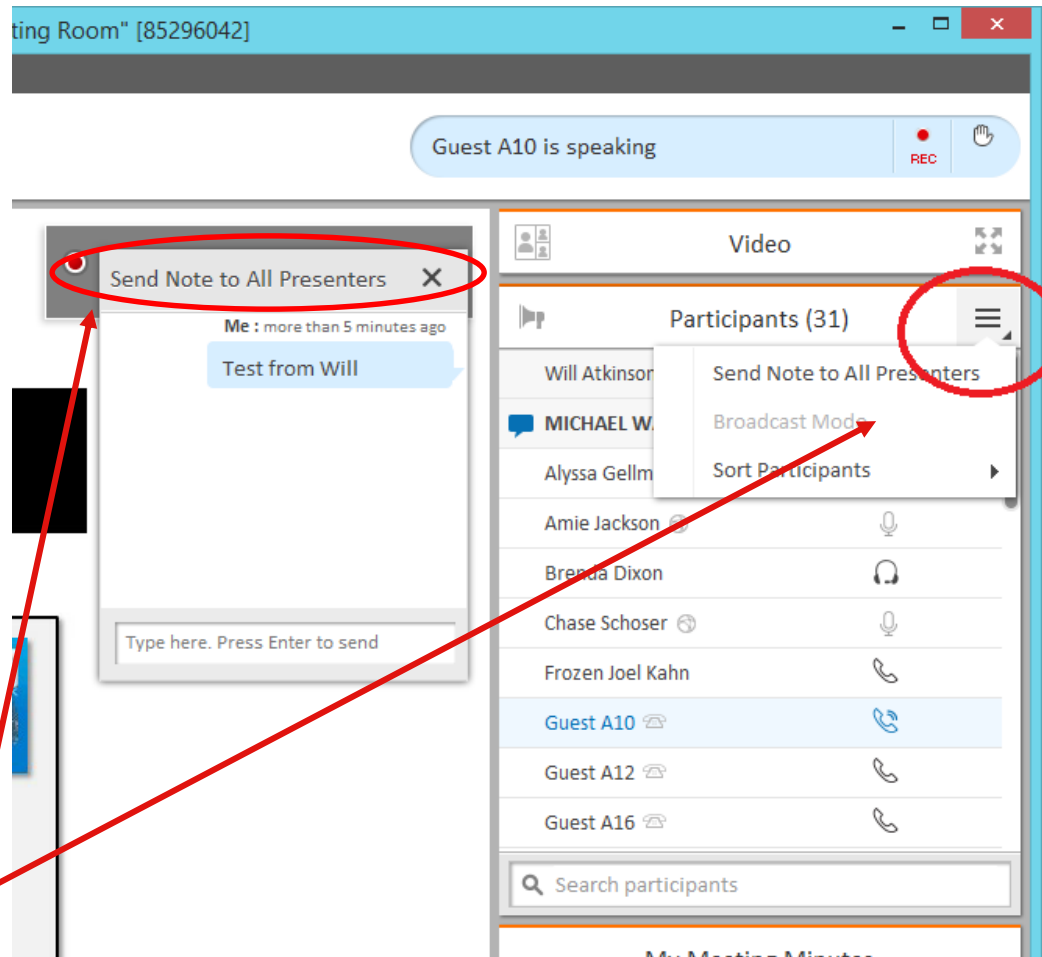
# Updates

- How to ask Questions of the presenters
- Inventory myth
- Where this presentation will be online
- Customer Service Survey



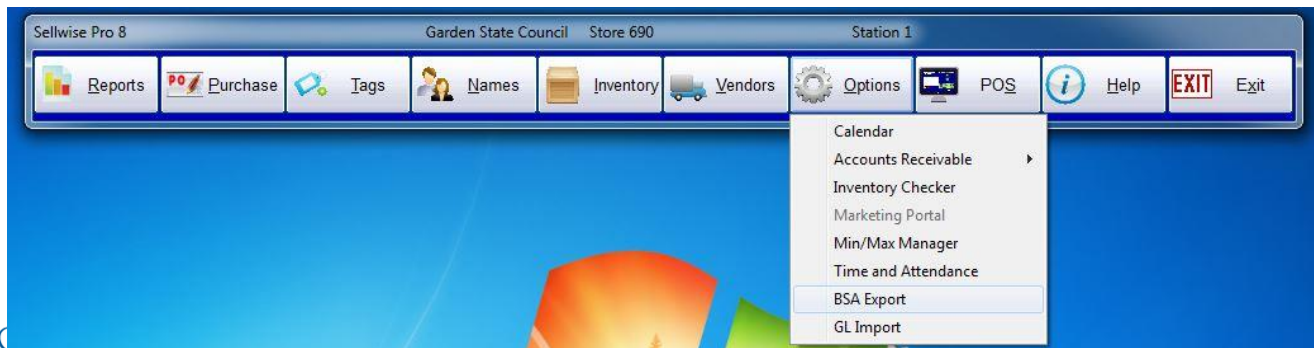
## If you have questions:

1. Look for horizontal bars at top right of your screen
2. Click on the bars and a chat window opens
3. Type in your question and hit enter to send



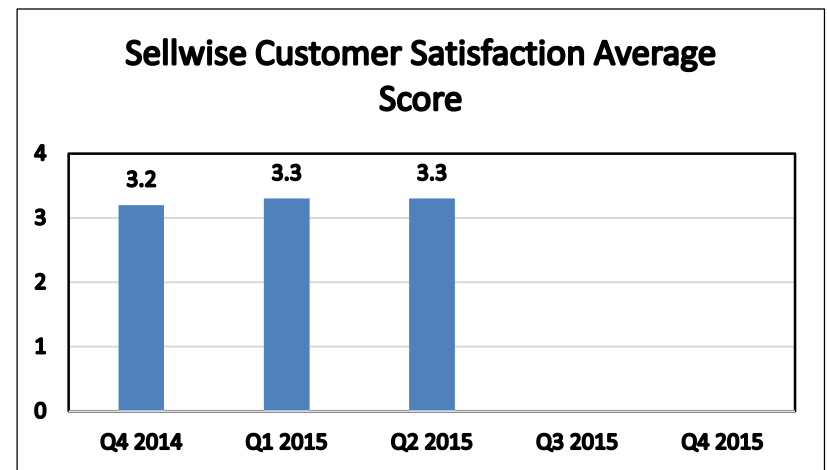
# Have you done your weekly inventory?

- Inventory is a weekly process
- Check five to ten different items each week
  - Choose five to ten items and count total inventory on the shelf, in the back room, etc
  - Write the inventory counts on a piece of paper
  - Open Inventory Checker from 'Options' in SW



# Customer Service Surveys

- CAP Software is continually trying to improve your customer experience
- BRIEF customer satisfaction survey link on every closed ticket email
- Average score in 2016 was 3.3 out of 4
- Tell us how we're doing!
- We're LISTENING and we CARE



# SAMPLE SURVEY EMAIL

Dear BSA User,

Thank you for contracting CAP Sellwise Support. The detailed ticket from your call is attached.

If your issue is not completely resolved, please let us know.

If you need further assistance, please reply or call for support. If the follow-up is already scheduled, then please standby for further contact from CAP.

Please click the survey link below to rate this interaction and to help us continually improve our support services.

[http://scouting.co1.qualtrics.com/SE/?SID=SV\\_6Yxn5YOGfV0DkTH](http://scouting.co1.qualtrics.com/SE/?SID=SV_6Yxn5YOGfV0DkTH)

Sincerely,

Cap Technical Support

CAP SUPPORT TEAM



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Slides and recording posted on [scouting.org/financeimpact](https://scouting.org/financeimpact)  
Look on the Council Fiscal Management Tab, then look at the bottom left for Sellwise Support/User Group link

The screenshot shows the navigation menu of the Finance Impact website. At the top, there are tabs for 'Council Fiscal Management', 'Council Fund Development', 'Training', 'FID e-Letter', and 'Ba'. The 'Council Fiscal Management' tab is selected. Below the tabs, the breadcrumb path is 'Finance Impact > Council Fiscal Management'. The main heading 'Council Fiscal Management' is circled in red. A red arrow points from the text 'Look on the Council Fiscal Management Tab' to this heading. Another red arrow points from the text 'look at the bottom left for Sellwise Support/User Group link' to the 'SellWise Support' link in the left-hand menu, which is also circled in red. The left-hand menu includes links such as '2013 National Annual Meeting', '5-Year Financial Planning', 'Budget Building Materials', 'Council Finance Facts', 'Fiscal Documents', 'Payroll / Personnel', 'Sample Policies', 'Sphere (Kintera) Help', 'PeopleSoft Documents', 'Accounts Payable', 'Asset Management', 'Audit Adjustments', 'Bank Reconciliation', 'Budget Tools', 'Communications', 'General Ledger', 'Month End', 'Point Of Sale', 'PeopleSoft User Group', 'PeopleSoft BSA User Guide', 'Webinars', 'Year End', 'SellWise Support', 'Document Library', and 'User Group Information'. The right-hand side of the page contains introductory text about Council Fiscal Management, a link to a webinar titled 'Webinar: Staying Tax-Exempt - PDF version of February 26, 2011', and a section for 'Preferred Service Providers'.



# QUESTIONS!

## Next Meeting

### Thursday, June 15

### 10:00 am CST

### 2:00 pm CST

