

# SellWise User Group

Thursday, September 21, 2017

## **Presenter**

Don Day, Team Lead, Shared Services



# User Group Topics

- New Backup Process – CAP Backup
- Adding a SellWise User
- Year-End Preparation – Inventory Checker
- Cost Price Update process
- Mail Codes in Names (Unit Deposit Accounts)
- Most common CAP Service calls
- Other Items



# Backing up SellWise

- New (added cost) service available
- Scheduled backup daily
- Creates an encrypted file stored securely to the cloud
- Reviewed daily for success by CAP
- CAP will restore your system if you have a failure
- AVAILABLE NOW. Contact CAP for Pricing



## Adding a SellWise User

- Each user - unique User ID and password
- Sales Code and a Password
- Sales Code can be the person's name
- Password must be 7 digits and include letters and numbers
- The Password must be reset every 90 days per PCI compliance
- Passwords must NOT be shared
- Councils should maintain a backup  
Manager/Administrator login to be used only in case staff lock themselves out



# Adding a SellWise User

CAP Software Configuration

Station #14  
DataPath: Z:\SW

Store1

**Station Settings**

- Station Settings
- Station Hardware
- Printers

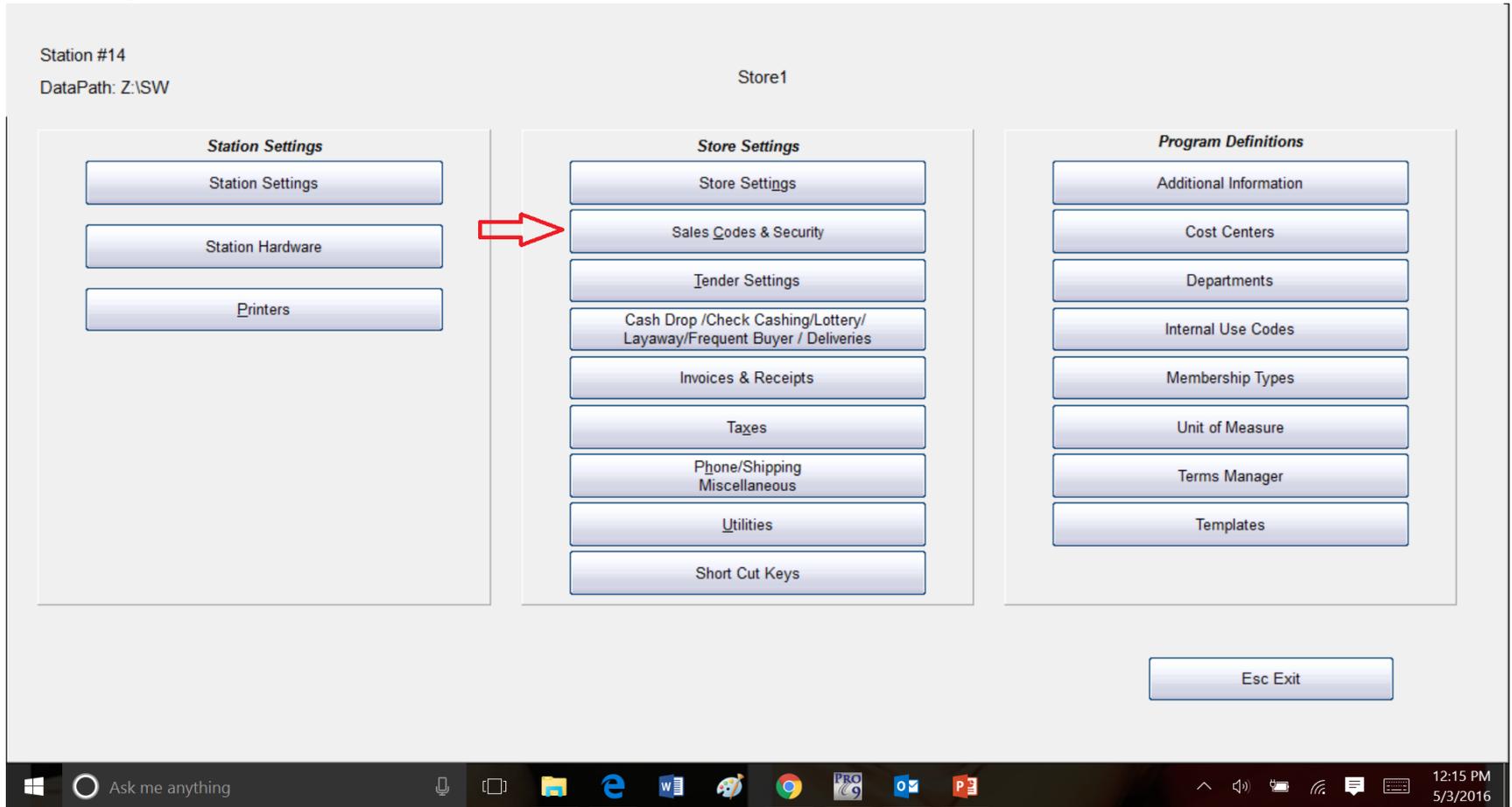
**Store Settings**

- Store Settings
- Sales Codes & Security
- Tender Settings
- Cash Drop /Check Cashing/Lottery/  
Layaway/Frequent Buyer / Deliveries
- Invoices & Receipts
- Taxes
- Phone/Shipping  
Miscellaneous
- Utilities
- Short Cut Keys

**Program Definitions**

- Additional Information
- Cost Centers
- Departments
- Internal Use Codes
- Membership Types
- Unit of Measure
- Terms Manager
- Templates

Esc Exit



# Adding a SellWise User

CAP Software Configuration - Sales Codes & Security

Sales Code	Shortcut	Sales Person	Password	Commission	Store #
ASSISTAN	AM	Assistant Manager	*****		1
CAP	CP	CAPTECH	*****	10 %P	1
CLERK	C	Clerk	*****		1
H	H	HELLO	*****	10 %P	1
MANAGER	MG	Manager Profile	*****	10 %P	1

Help

Add Staff Department  
Definitions

Add

Change

Delete

Find

Esc Exit



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# Adding a SellWise User

CAP Software Configuration - Sales Codes & Security

Sales Code	Shortcut	Sales Person	Password	Commission	Store #
ASSISTAN	AM	Assistant Manager	*****		1
CAP	CP	CAPTECH	*****	10 %P	1
CLERK	C	Clerk	*****		1
H	H	HELLO		10 %P	1
MANAGER	MG	Manager P		10 %P	1

**Sales Codes & Security**

Sales Code:  Store Number:

Shortcut:  ARCode:

Sales Person:

Password:

*can only be entered at login screen when strong passwords*

Commission:  %Profit

Security Settings

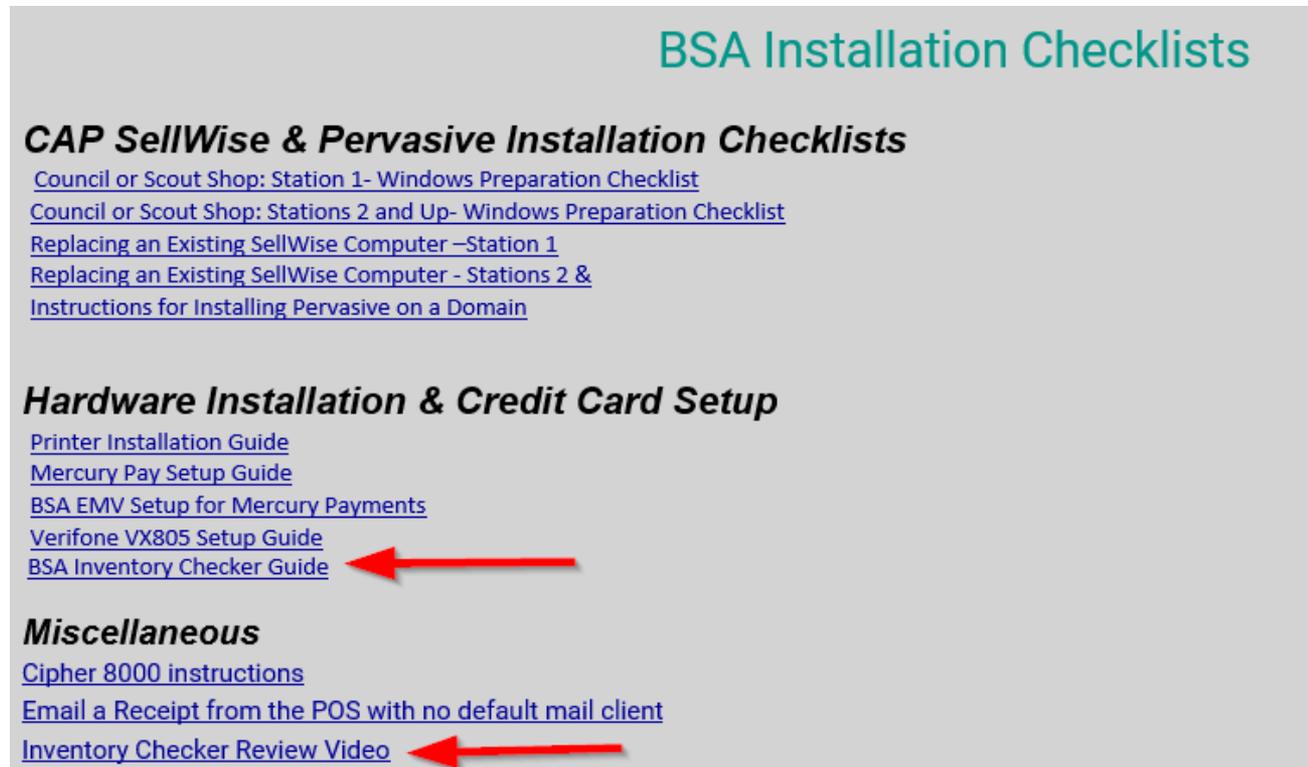
# Year-End Preparation: Using Inventory Checker

- The Inventory Checker Module in SellWise is used to physically count a Council store's inventory to allow you to reconcile your physical count versus the inventory that is in SellWise.
  - Inventory Checker can be used with a portable data collector or a paper count sheet.
  - You can rent the Cipher Lab devices from CAP for \$80 per week.
- Use the Inventory Worksheet in the main **Reports** menu to assist with your count process.
- Multiple staff can be counting at the same time. Each count should be input separately and then they can be merged in the Inventory Checker Process.
- Councils **MUST** perform a physical count at least once per year, **but it is recommended that you count at least parts of the store more often, perhaps weekly, monthly, quarterly.**
- The procedure is the same for a partial or complete count.



# Using Inventory Checker

- Review the documentation before beginning the process. A little preparation can save a lot of wasted time during this process.
- Visit CAP support site for the documents and detailed video:
- [www.capretail.com/bsasupport/](http://www.capretail.com/bsasupport/)



The screenshot shows a webpage titled "BSA Installation Checklists" with several sections of links. Two red arrows point to specific links: one to "BSA Inventory Checker Guide" and another to "Inventory Checker Review Video".

## BSA Installation Checklists

### **CAP SellWise & Pervasive Installation Checklists**

- [Council or Scout Shop: Station 1- Windows Preparation Checklist](#)
- [Council or Scout Shop: Stations 2 and Up- Windows Preparation Checklist](#)
- [Replacing an Existing SellWise Computer –Station 1](#)
- [Replacing an Existing SellWise Computer - Stations 2 &](#)
- [Instructions for Installing Pervasive on a Domain](#)

### **Hardware Installation & Credit Card Setup**

- [Printer Installation Guide](#)
- [Mercury Pay Setup Guide](#)
- [BSA EMV Setup for Mercury Payments](#)
- [Verifone VX805 Setup Guide](#)
- [BSA Inventory Checker Guide](#)

### **Miscellaneous**

- [Cipher 8000 instructions](#)
- [Email a Receipt from the POS with no default mail client](#)
- [Inventory Checker Review Video](#)



# Using Inventory Checker

- Reminders:
  - The store should be closed during the physical count
  - Take a 'snapshot' of your inventory before counting
  - Use the Inventory Worksheet, not Custom Lists, to produce your count sheets
  - Make sure to count store rooms or excess inventory
  - While doing entry of counts, save after every 20 items
    - this keeps your data file safe if your system crashes
  - Save your reports for audit purposes
  - Contact CAP Support via the Member Care Contact Center (972-580-2489) or [bsasupport@capretail.com](mailto:bsasupport@capretail.com) for assistance.
  - Enjoy your nice, clean inventory!



# Cost Price Update and Value Analysis

The Cost/Price Update File Includes:

- New Inventory Items
- Updated Inventory Items
- Current Cost Updates
- **Actual Cost Updates**
- Retail Price Updates



# Cost Price Update

- The “Actual Cost Update” is the one to be aware of when working through an audit.
- Changing the ‘Actual Cost’ in your Inventory changes the Actual book value of your inventory, independent of sales/receipts of items.
- **Make sure your auditor knows** that you have done Cost/Price Updates during the review period to help identify changes to your Value Analysis.



# SellWise Mail Codes

- Mail Codes are a way to group your customers in the Names database, including Units, Employees, Volunteers or Activities. You can use these codes to sort customers in Custom Lists.

These are the recommended Mail Codes for common Names:

- U – Units
- S – Staff
- V – Volunteers
- P – Program or activities



# SellWise Mail Codes

By design, the Mail Codes are tied to GL numbers where appropriate so that transactions associated with these Names go to the appropriate GL number in your nightly export to PeopleSoft.

U = 2341

E = 1255

V = 2306

“On Account” transactions rung up to Names without a valid mail code will go to different GL Account (not 2341).



# SellWise Mail Codes

You can run a Custom List in Names to see all of your customers and the associated Mail Code.

It is good practice to do this occasionally to ensure all your units are coded correctly.

If your GL isn't balancing or transactions are missing from 2341, double-check your Mail Codes and correct any missing or invalid ones.

Unit accounts **MUST** have Mail Code U to work properly in the GL!



# Common CAP Service Calls

- User lockouts
- General Ledger questions
- Configuration questions.



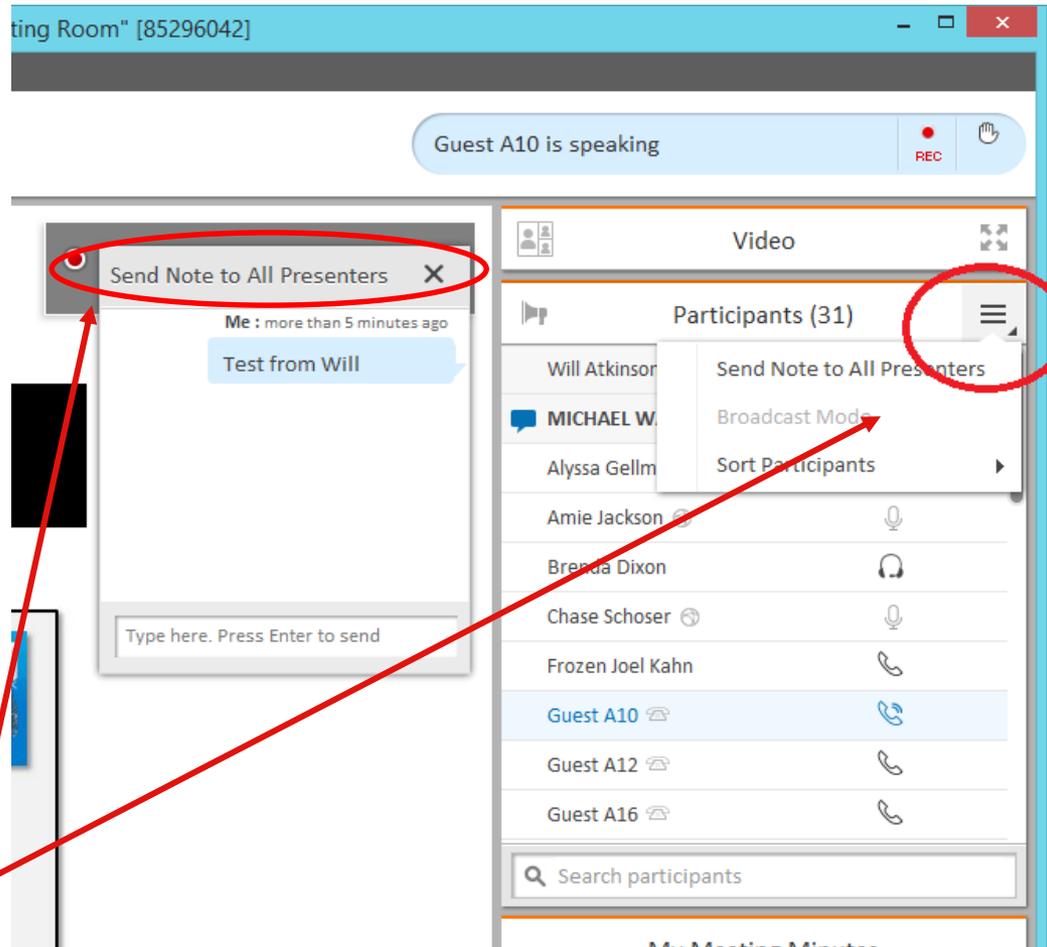
# In conclusion

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



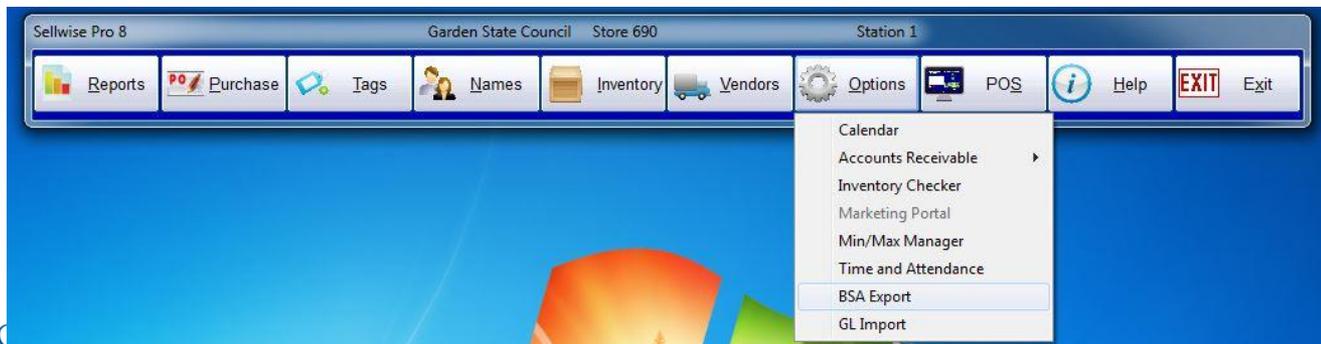
## If you have questions:

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



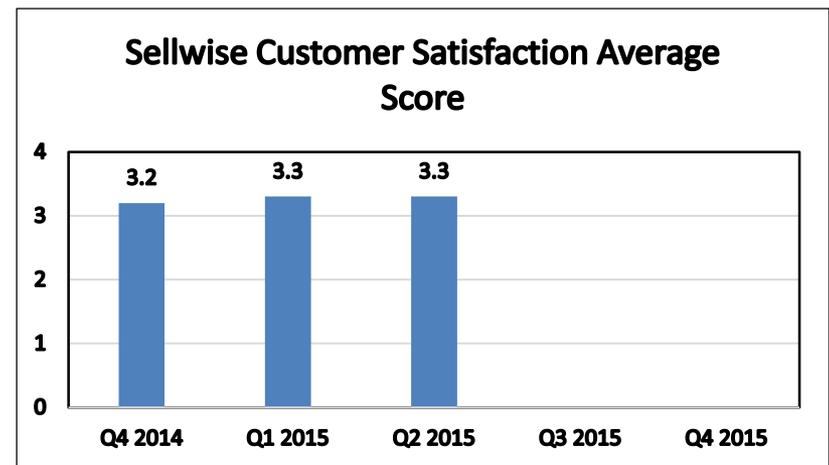
# Have you done your weekly inventory?

- 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



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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

Council Fiscal Management | Council Fund Development | Training | FID e-Letter | Ba

Finance Impact > Council Fiscal Management

## Council Fiscal Management

Council Fiscal Management provides councils with resources and stewardship through on-site support, training courses, sharing of bes

Webinar: Staying Tax-Exempt - PDF version of February 26, 201  
Read the Frequently Asked Questions  
View the LiveStream presentation

Preferred Service Providers

- COUNCIL FISCAL MANAGEMENT
- 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
  - User Group Information



# QUESTIONS!

## Next Meeting

### Thursday, November 9th

10:00 am CT

2:00 pm CT

