

SellWise User Group

Thursday, March 15th, 2018

Presenters

Will Atkinson, President – CAP/Sellwise
Don Day, Team Lead, Shared Services



User Group Topics

- CAP Backup Process – CAP Backup
- PCI Information
- Adding New Users
- GL Upload Issues
- Windows 10 and Pervasive 13 Database
- Most common CAP Service calls
- Updates



Backing up SellWise

- Is your data secure?
- New (added cost) service available
- Scheduled backup daily, runs automatically
- Creates an encrypted file stored securely to the cloud
- Reviewed daily for success by CAP
- We contact you if your system fails to backup
- CAP will restore your system if you have a failure
- AVAILABLE NOW. Contact CAP for Pricing



PCI Auditing Information

- PCI = Payment Card Industry
- Any business accepting credit cards must audit
- Audit includes SAQ and External Scan
- SAQ = Self Assessment Questionnaire
- Councils using Vantiv have access to Trustwave
- Trustwave is a QSA: Qualified Security Assessor
- Trustwave can help with every step of the way
- Visit www.trustwave.com to get started
- NO other fees or third parties are needed



Setting Up New SellWise Users

- SellWise Toolbar
- Click Help -> Configuration
- Click 'Sales Codes and Security'



Setting Up New SellWise Users

- Select a Profile you'd like to copy
- Enter the Name and new Sales Code
- Change any permissions you wish
- The first time they login, they will be prompted to create a password



Setting Up New SellWise Users

Sales Code	Shortcut	Sales Person	Password
ASSISTAN	AM	Assistant Manager	*****
CLERK	C	Clerk	*****
H	H	HELLO	*****
MANAGER	MG	Manager Profile	*****

Sales Codes & Security [-] [□] [×]

Sales Code: Store Number:

Shortcut: ARCode:

Sales Person:

Password:

can only be entered at login screen when strong passwords

Commission:



“Quirky” GL Upload Issue

- Not a common issue
- Most common GL # issues allow you to upload
- Errors are found the next day
- But, if you have \$0 in net sales for the day, you will get an error running the EOD export
- If no sales, or an equal sale and return
- Check your Sales Summary



Windows 10 and Pervasive 13

- Pervasive is the SQL database used by BSA for SellWise
- Most councils are using Pervasive 8, 9, or 10
- These versions will NOT work on Windows 10
- The latest available version is Pervasive 13
- Cost is \$125 per computer
- Versions may not be mixed
- Please budget for this if buying Windows 10 PCs



Common CAP Service Calls

- User lockouts
- General Ledger questions
- Configuration questions



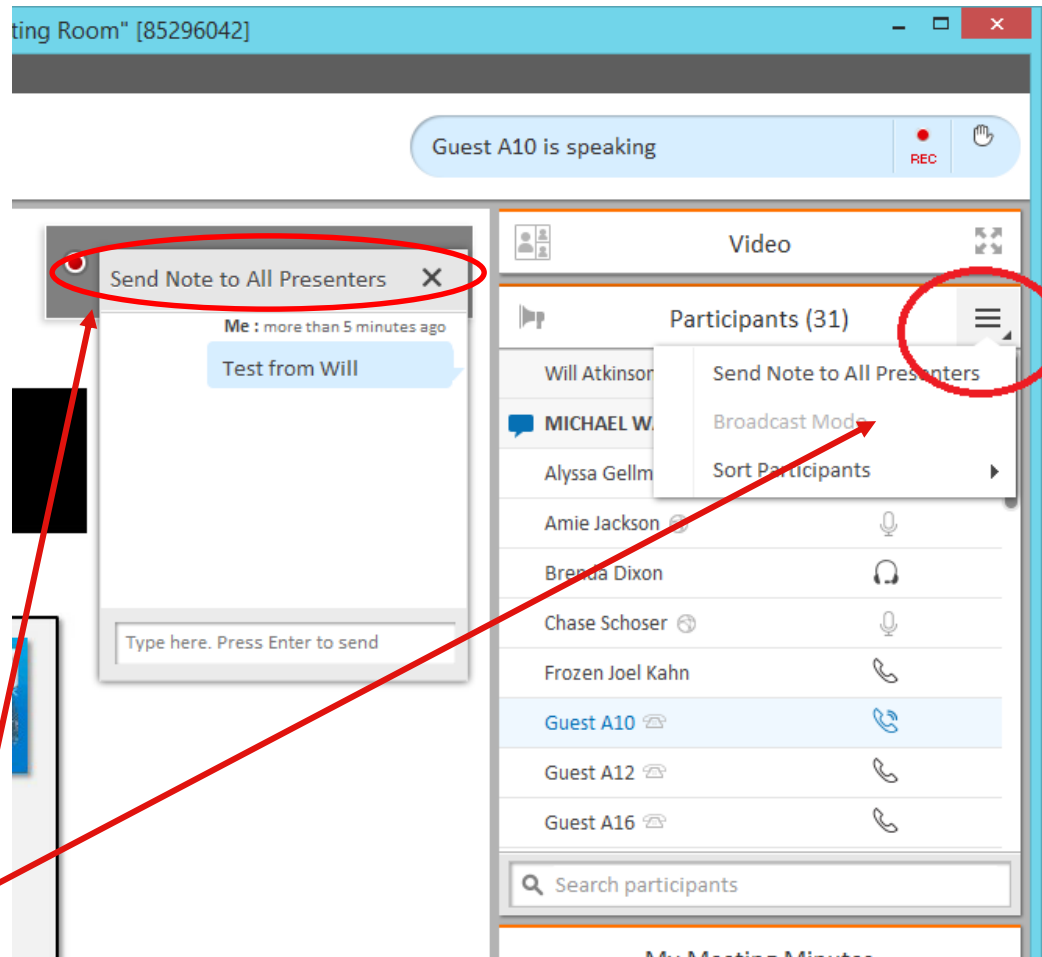
Updates

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



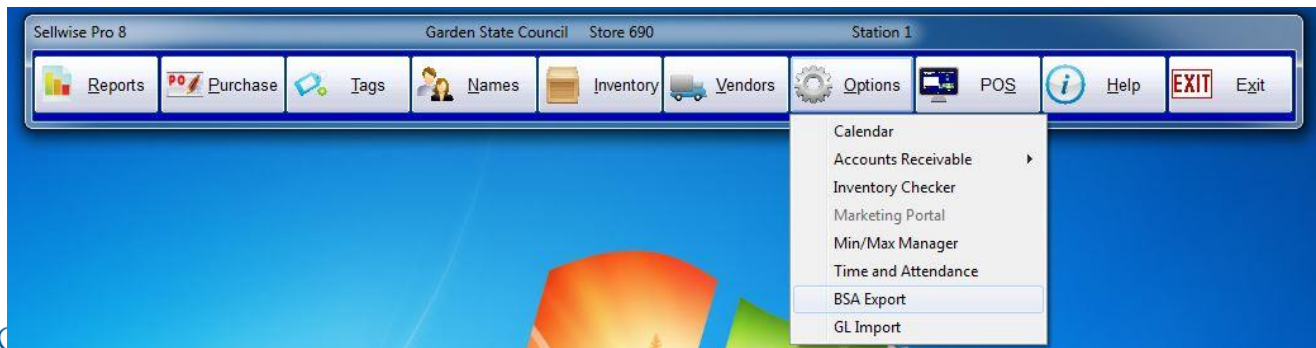
If you have questions:

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



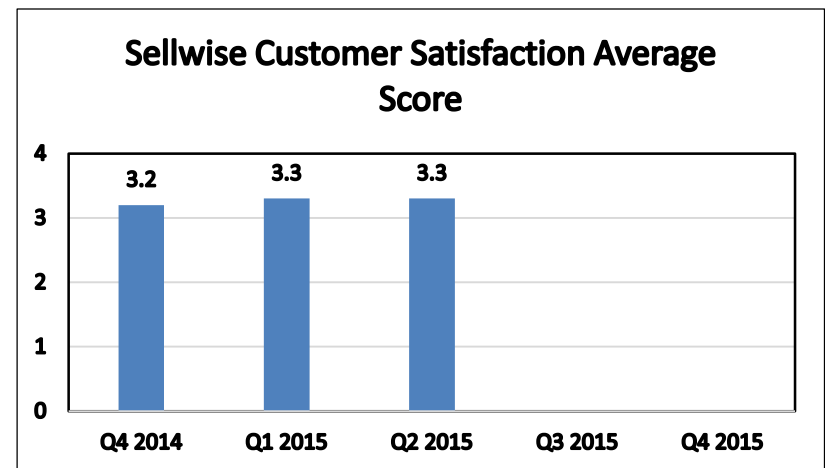
Common Myth: Inventory is once a year

- Truth – 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 2015 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

Sincerely,

Cap Technical Support

CAP SUPPORT TEAM



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Slides and recording posted on 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 for 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 items 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 shows the main content area with a heading 'Council Fiscal Management' and a sub-heading 'Preferred Service Providers'.



QUESTIONS!

Next Meeting

Thursday, April 19th

10:00 am CST

2:00 pm CST

