

SellWise User Group

Thursday, August 23rd, 2018

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



User Group Topics

- CAP Backup Process – CAP Backup
- TLS-SHA1 Update Information
- Correcting Mistakes in Transactions
- Did you know?
- EMV Reminder!
- Most common CAP Service calls
- Updates



Backing up SellWise

- How secure is your backup?
- 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



TLS-SHA Update Information

- TLS 1.0/SSL 3 and SHA-1 are internet security protocols related to data transmission
- These standards have been found to be vulnerable to hacking attacks
- These standards are expiring and credit card processors are moving to SHA-2 and TLS 1.2 protocols
- Merchants using the old protocols will see a complete disruption of service based on their processor's deadlines



TLS-SHA Update Information

- What do you need to do?
- If you use the BSA Preferred processor, Vantiv, then you don't need to do anything
- If you use another processor, contact them for guidance
- Consider switching to Vantiv to maintain secure processing protocols in the future



Fixing Transactional Mistakes

- Mistakes happen when ringing sales
- Common mistakes include:
 - Ringing up the wrong fee/item
 - Selecting the wrong unit account
 - Using the wrong tender type/GL account
 - Entering the wrong price for fees/registrations



Fixing Transactional Mistakes

- If you identify a transaction that was rung incorrectly the SAME DAY that it was rung, you may use the Void function in operations
- If found AFTER the day of the transaction, the sale MUST be returned, and then re-rung correctly, per BSA policy
- This avoids reporting issues and GL upload issues



Did You Know – Digital Signage

- CAP offers a Digital Signage Player in SellWise
- Works with any LCD monitor attached to your PC
- May require an adapter
- Plays Windows Media:
 - Movies
 - Slideshows
 - New item information or event promos

Customer Display

Qty	Item ID	Description	Price	Total
1	B1811588	Name Badges	4.00	4.00
1	D0795701	Moorwood Deck Stain Brown	21.44	21.44
		CAP DEMO		
		Change Due: 22.97		
		Sub Total	25.44	
		Tax	1.59	
		Total	27.03	



EMV is STILL here!

- VISA announced this month that 97% of its credit cards in circulation are now EMV/Chip cards
- It's not too late to update your processing abilities to add EMV capability to your store
- Includes Apple Pay/Google Pay/Samsung Pay
- Reduces your chargeback and fraud risk
- Merchants have seen more than 70% reduction in card fraud used in physical transactions



Add EMV to your store

- Supports credit, debit, and gift cards
- Cost is \$350 for each VX805 device with Vantiv, including configuration
- Contact bsaorders@capretail.com to get started today



Common CAP Service Calls

- User lockouts
- General Ledger questions
- Configuration questions



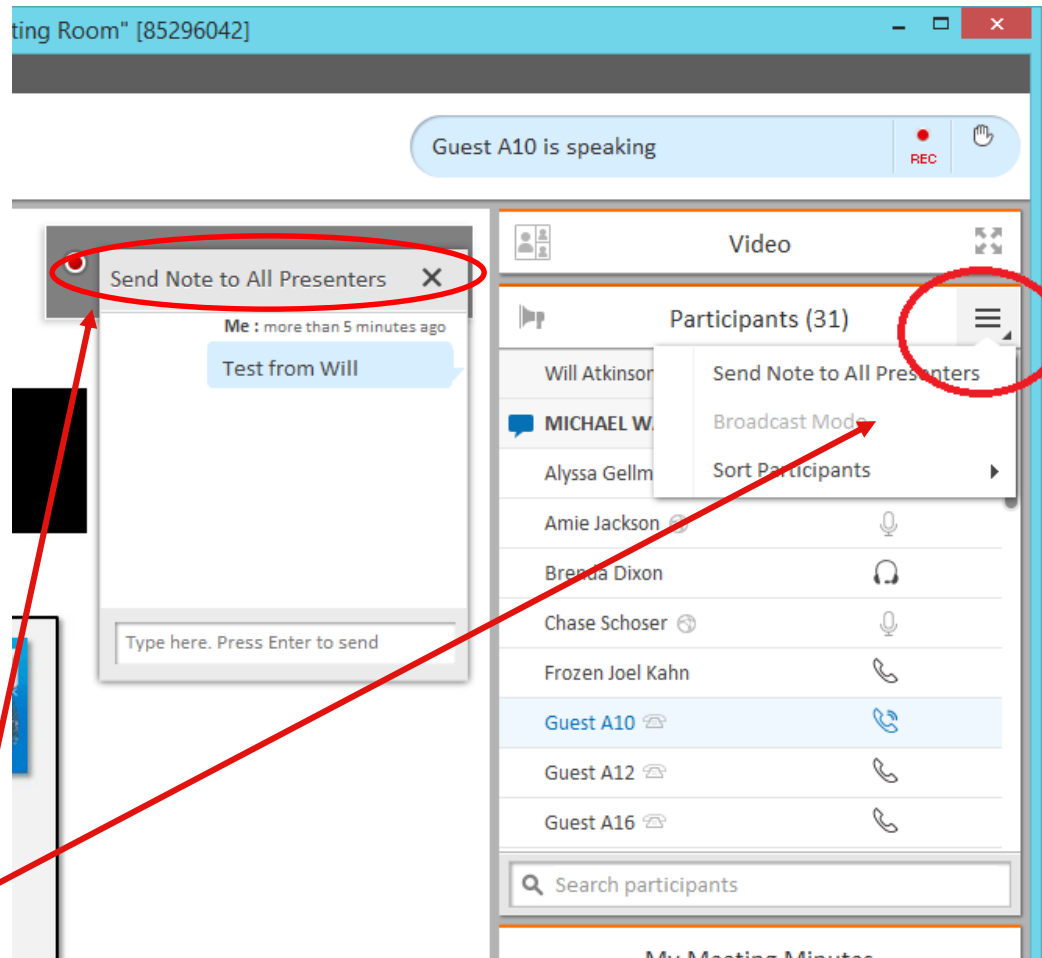
Updates

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



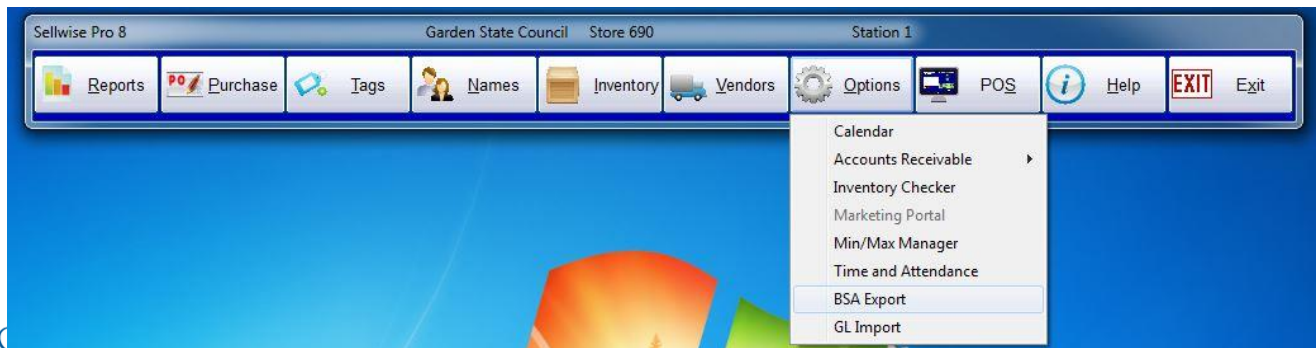
If you have questions:

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



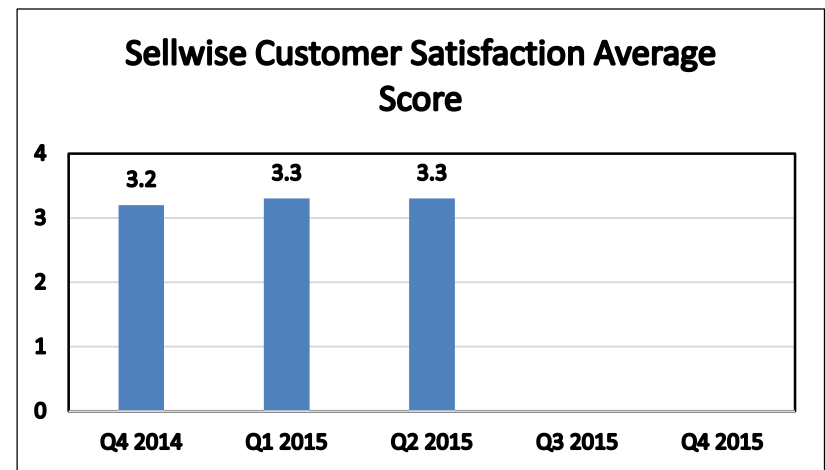
Common Myth: Inventory is once a year

- 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 a navigation menu with tabs: Council Fiscal Management, Council Fund Development, Training, FID e-Letter, and Ba. The 'Council Fiscal Management' tab is active. 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 sidebar, which is also circled in red. The sidebar contains a list of links including: 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 main content area on the right includes a description of Council Fiscal Management, a webinar link 'Webinar: Staying Tax-Exempt - PDF version of February 26, 201', a link to 'Read the Frequently Asked Questions', and a link to 'View the LiveStream presentation'. Below this is a section for 'Preferred Service Providers'.



QUESTIONS!

Next Meeting

Thursday, September 20th

10:00 am CT

2:00 pm CT

