

# SellWise User Group

Thursday, February 21st, 2019

## Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



# User Group Topics

- New Credit Card Prefix #8
- HotKeys on your main POS menu
- Creating a GL Tender Type
- Unit Account Balance Maintenance
- New PDF Receipt from the POS
- SellWise Updates Available
- Most common CAP Service calls
- Updates



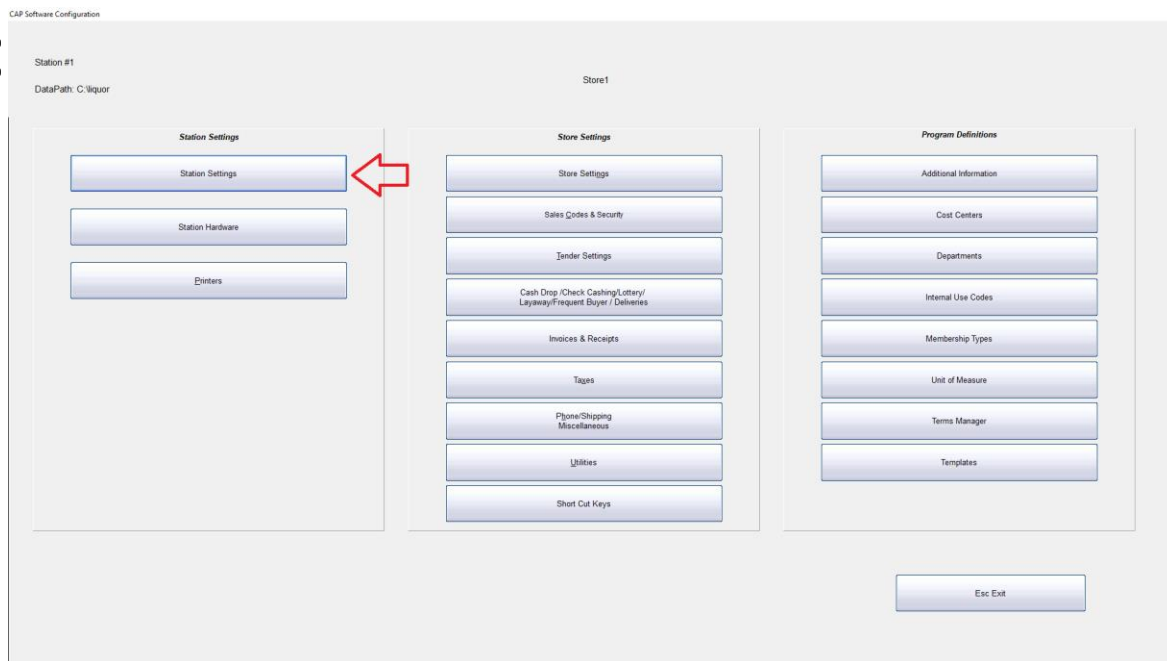
# New Credit Cards are Coming

- Discover Card supports smaller card issuers via their networks
- Examples: JCB, ChinaBank, etc.
- UnionPay is a new card supported by Discover
- These cards begin with the #8
- These will process seamlessly today
- You need to update SellWise to accurately reflect UnionPay in your reports. Contact CAP Support for assistance



# Setting HotKeys as the Main Menu

- Ideal for Cash Receipt Desks!
- → SellWise Toolbar → Help → Configuration
- Station Settings:



# Setting Hotkeys as the Main Menu

CAP Configuration - Station Settings

POS Display Options	
Select POS Display Screen	Multi Touch POS
Select Quick Key Set	None Available
Show Special Keys on Main Screen as	None
Default POS Lookup: Inventory List	Description
Default POS Lookup: Name List	Last Name
Use Larger keypad for POS Lookup Lists	No
Select Display for Name Detail: Limited(faster)or All Details.	Limited
Select Display for Inventory Detail: Limited(faster) or All Details.	Limited
Show Keyboard on POS Name and Item Lookups	Yes
Display Department List when Open Department Selected	Yes
Display Item Cost on Inventory Lookup	No
Select Style for POS	Classic
Custom Colors for POS	
Use Candy Buttons on Main POS	Yes
Show on account sales on POS Cash Drawer Report	No
When Name Selected Show	None
Display Selection Bar on Break Pack Items	Yes
Show UPC in Item Lookup	Yes
Show Dept Name or Dept Code in Item Lookup	Code
Show SL or ItemID in Item Lookup	ItemID
Show Extended Description on main grid	No
Main POS Picture	C:\Program Files\CAP\CAP2011.jpg
POS Functions	
Jump to Names Screen First at Point of Sale	No
Clear Sales Code after each sale	No
Warning if Item is not in stock at Point of Sale	No
Pause for 'Change Due' notice before next invoice	No
Hide Item Prices on Quotes	No
Hand enter quantity for each item at POS main screen	No
Use Item Quantity button as ON/OFF switch	No
Prompt for quantity when using Hot Keys	No
Use PickList in Warehouse	No
Enable Local Mode (Allows Sales to be made when Network is down)	No
Show Temporary Reports when in Local Mode	No

F1 Help      Predefined Custom Color      F10 Accept      Esc Cancel



# Setting Hotkeys as the Main Menu

POS Display Options	
Select POS Display Screen	Multi Touch POS
Select Quick Key Set	Quick Keys
Show Special Keys on Main Screen as	Multi Touch POS
Default POS Lookup: Inventory List	Hot Keys
Default POS Lookup: Name List	Description
Use Larger keypad for POS Lookup Lists	Last Name
Select Display for Name Detail: Limited(faster) or All Details.	No
Select Display for Inventory Detail: Limited(faster) or All Details.	Limited
Show Keyboard on POS Name and Item Lookups	Limited
Display Department List when Open Department Selected	Yes
Display Item Cost on Inventory Lookup	Yes
Select Style for POS	No
Custom Colors for POS	Classic
Use Candy Buttons on Main POS	
Show on account sales on POS Cash Drawer Report	Yes
When Name Selected Show	No
Display Selection Bar on Break Pack Items	None
Show UPC in Item Lookup	Yes
Show Dept Name or Dept Code in Item Lookup	Yes
	Code

- Select HotKeys and restart the POS



# Creating a New GL Tender Type

- Specific Steps MUST be followed
- In Help → Configuration → Tender Settings
- Create a new GL Tender Type
- You MUST use one of these two descriptions:
- Genl Ldgr
- GL Acct
- Set the Tender Type to “Other”



# Creating a New GL Tender Type

CAP Configuration - Tender Settings

Tender Description	Tender Type	Open Drawer?
On Account	On Account	
Cash	Cash	
Check	Check	Yes
AMEX	Credit Card	Yes
VISA	Credit Card	Yes
Master Card	Credit Card	Yes
Layaway Account	Layaway Account	
Other Credit Card	Credit Card	No


**Add Tender Type** [X]

Tender Type: Other [v]

Description: GL Acct [v]

Open Drawer: No

F1 Help   F10 Accept   Esc Cancel





# Creating a New GL Tender Type

Account Set Up

Last Invoice Processed: 0147166      Date: 01/02/2019      Business Unit #: L690

**GL Account Codes**

Cash Deposit	1101099900	DoubleKnot	1800977720
Check Deposit	1101099900	Gift Card	1278756500
AMEX	1101101700	CC Adjust	1101101700
Visa	1101101700		
Master Card	1101101700	Accounts Rec. Units	1234199900
Gen Ldr	1915300025	Accounts Rec. Other	1124299900
Fund 2 Cash	2101399900	Default Income Receipts	1693199990
Fund 3 Cash	3100199900	Sales Taxed	1630299990
Gift Certificate	1278799900	Sales No Tax	1630199990
Fund 2 Check	2101399900	Taxes 6.625%	1276199900
Fund 3 Check	3100199900		
Discover	1101101700		

Save Changes      Select Range for Export      Summary Export      Export      Esc / Exit



# Modifying Unit Account Balances

- Select Unit with balance to be charged off or moved.
- Run a transaction to the Unit Accounts GL number and charge it to the account.
- To move the amount into another Unit, do a return sale to that Unit from the same Unit Account item.
- The balance moves and the transactions cancel.



# New PDF Receipt for E-mail

- Councils have had issues with SellWise and Microsoft Office 365 e-mail compatibility
- To e-mail a receipt after the initial transaction, go to Operations, and Find Transaction.
- Find the receipt to be e-mailed.
- Select 'Print'. A pop up box will ask if you wish to save the receipt to file prior to printing.
- Save the file and attach it to your e-mail.



# SellWise Updates Available

- There is a new BSA version/build available with the following changes:
- #8 prefix credit card reports
- Password Reset questions
- PDF e-mail support
- Inventory Lookup Modifications/enhancement
- Updated security features for installation sets
- We will update you during your next service



# Common CAP Service Calls

- User lockouts – Get the update!
- General Ledger questions
- Configuration questions



# Updates

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



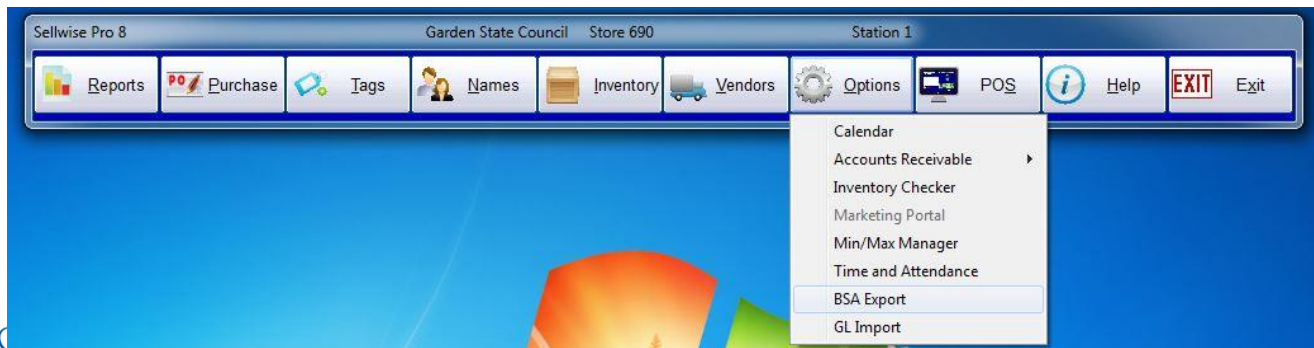
# Questions for Presenters

1. Look for horizontal bars at top of your screen
2. Hover over the “More” menu item on the Member bars
3. Click on “Chat”
4. Type in your question and hit enter to send



# Common Myth: Inventory is once a year

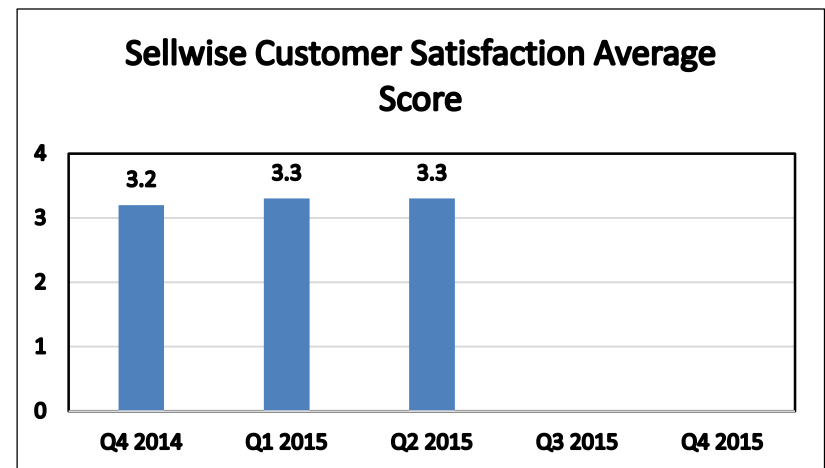
- Truth – Inventory is a weekly process
- Check five to ten different items each week
  - Choose five to ten items and count total inventory on the shelf, in the back room, etc
  - Write the inventory counts on a piece of paper
  - Open Inventory Checker from ‘Options’ in SW





# 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](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** Look on the Council Financial Management Tab, then look at the bottom for Sellwise Support/User Group Information

The screenshot shows the top navigation bar with the Boy Scouts of America logo, links for 'Join', 'Give', 'Shop', 'My.Scouting Login', a search bar, and a 'Menu' icon. Below the navigation bar is a breadcrumb trail: 'Home > Council Support > Financial Services > Council Financial Management > SellWise Support > User Group Information'. The left sidebar contains a 'Council Support' menu with the following items: Strategic Performance Office, Contact Strategic Performance, Council Assessments, Council Board Resources, Council Business Practices, Council Fiscal Management and Training, Journey to Excellence, Financial Services, Back Office Business Solutions, Council Financial Management (highlighted in yellow), and Council Fund Development. The main content area features a yellow header for 'User Group Information'. Below the header, there is a link for 'CAP Software Support Site: http://www.capretail.com/bsasupport' and a list of links for 'February 2019 User Group Presentation Slides', 'January 2018 User Group Presentation Slides', 'March 2018 User Group Presentation Slides', 'August 2018 User Group Presentation Slides', 'November 2018 User Group Presentation Slides', 'November 2018 User Group Recording', 'December 2018 User Group Presentation Slides', and 'December 2018 User Group Recording'. A second list of links follows for 'January 2017 User Group Presentation Slides', 'February 2017 User Group Presentation Slides', 'May 2017 User Group Presentation Slides', 'July 2017 User Group Presentation Slides', 'September 2017 User Group Presentation Slides', and 'December 2017 User Group Presentation Slides'. A final list of links is provided for 'January 2016 User Group Presentation Slides', 'February 2016 User Group Presentation Slides', and 'March 2016 User Group Presentation Slides'.



# QUESTIONS!

## Next Meeting

### Thursday, March 21st

### 10:00 am CST

### 2:00 pm CST

