SellWise User Group

Thursday, May 23rd, 2019

Presenters

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

• Summer Camp Setup = Now
• Mail Codes and Unit Accounts
• Windows 10 and Pervasive 13
• SellWise Updates Available
• Most common CAP Service calls
• Updates
Summer Camp Setup Reminder

• CAP Support is standing by to help setup new machines, inventory, etc.

• Make sure you have these items ready for Camp:
  – Current PCs and monitors
  – VX805 pinpads for credit card processing with WorldPay
  – Receipt Printer
  – Cash drawer
  – Barcode scanner
  – SellWise and Pervasive licenses for each computer
Summer Camp Setup

- Key in or import inventory data
- Transfer stock using Internal Use and Purchasing
- Setup and test used and new equipment
- Configure tax rates and any other local settings
- Make sure to train new camp staff!
Mail Codes in CAP Names

• Mail Codes are used to categorize types of customers.
• The most common group is Units, with a mail code of U.
• Other customers in the system could be council staff (mail code=S), council and district activities (mail code=A), or volunteers (mail code=V).
Mail Codes in CAP Names

• Only Units should have funds on deposit recorded in General Ledger account 2341.
• Employees should have a GL 1255 account assigned for charges.
• For volunteers, assign a GL 2306 account.
• For non-Unit customer, put the appropriate liability GL account under “Additional Information, GL account.”
• Do not put a GL number on Names with a Mail Code assigned.
• Refer to the manual online for further details.
Windows 10 and Pervasive 13

- Reminder, Pervasive versions 8 through 12 DO NOT support Windows 10
- When upgrading PCs to Win 10, you must purchase new Pervasive licenses
- Cost is $125 each
- After 5 concurrent seats, a server license is required.
- Pervasive versions cannot be mixed in one site
- Potentially re-use older PCs for camp sales, etc.
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 – Get the manuals before adding/changing if you’re not sure
• Configuration questions
Updates

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

![Sellwise Customer Satisfaction Average Score]

Q4 2014: 3.2
Q1 2015: 3.3
Q2 2015: 3.3
Q3 2015: 
Q4 2015: 

Prepared. For Life.
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
Slides and recording posted on scouting.org/financeimpact
Look on the Council Financial Management Tab, then look at the bottom left for Sellwise Support/User Group link
QUESTIONS!

Next Meeting
Thursday, June 20
10:00 am CST
2:00 pm CST