

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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- Invite Alt+I
- Pause Recording Alt+P
- Stop Recording Alt+C
- Disable participants annotation
- Share computer sound
- Optimize Share for Full-screen Video Clip
- End Meeting Alt+Q

Join Audio Start Video Manage Participants New Share Pause Share Annotate More

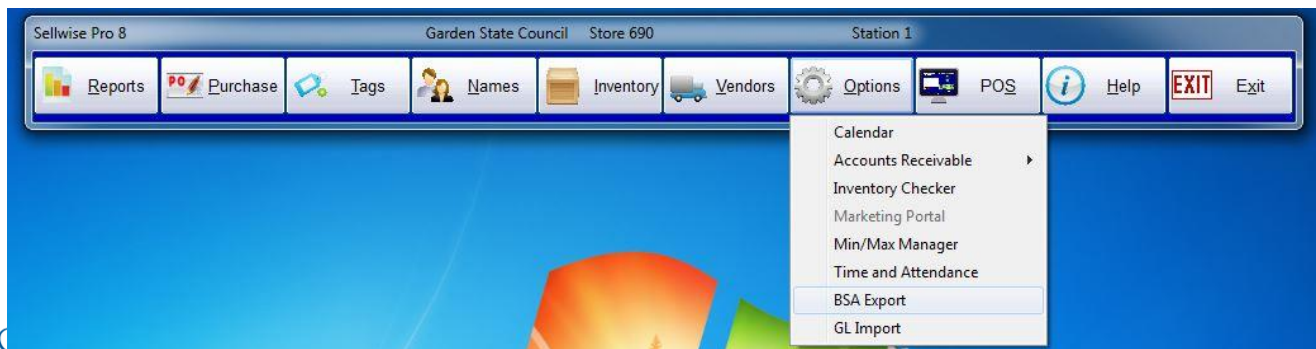


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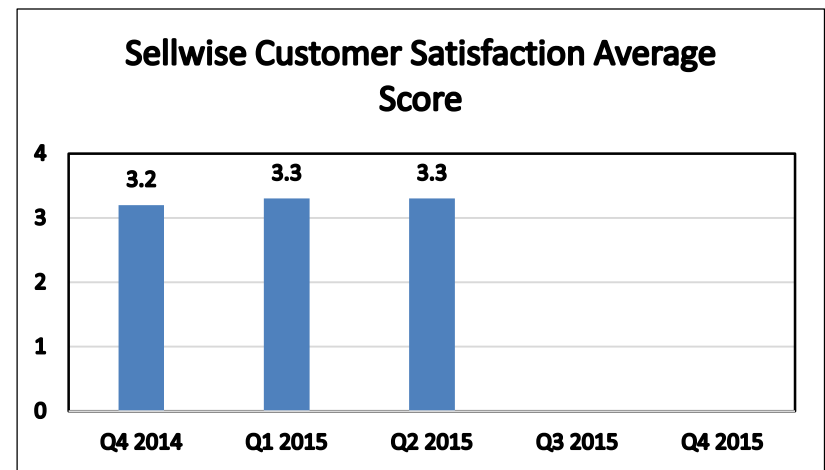
Common Myth: Inventory is once a year

- 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



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



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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

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Council Financial Management

Council Financial Management provides councils with resources and support in the areas of accounting, on-site support, training courses, sharing of best practices, and resources for non-profit accounting.

Webinar: [Staying Tax-Exempt](#) – PDF version of February 26, 2014 presentation
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QUESTIONS!

Next Meeting

Thursday, June 20

10:00 am CST

2:00 pm CST

