

SellWise User Group

Thursday, June 20th, 2019

Presenters

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



User Group Topics

- Balances and Statement History
- Password Reset Utility
- SellWise Updates Available
- Most common CAP Service calls
- Updates



Balances and Statement History

- Councils occasionally call in to report a perceived balance discrepancy.
- Identified by Council or by Unit.
- Balances are affected by charges against the account, and payments to the account.
- HCOM councils consolidate balances from multiple stores. All sites must poll properly to get correct balance.
- Voids>Returns or GL transfers also affect balances



Balances and Statement History

- Review charges/payments on an account by selecting the account in Names
- Select 'Account History' for a full detail of charges and payments
- Invoices are available to be viewed in detail on this screen



Balances and Statement History

- If you (or a unit) believes the balance is incorrect, you must review the charges and payments thoroughly to find any mistakes
- Sometimes councils call in to report that a balance is incorrect with no specific supporting evidence
- To help with this scenario, save a detailed statement history each year for future audit



Statement History

ew Item Sales Accounts Receivable

Statements

Statement Closing Date: 6 /17/19

Range: \$STUFF to ZURCHER

Sort by: AR Code Business Last Name Mail Code

Select Statement Type:

- Transactions since last Statement
- Open Items
- All Transactions
- Balance Only
- Transactions in Date Range

Reprint Last Statement:

Include Statements with Credit Bal.:

Print Payment Terms:

Do not print when Balance less than: 0.00

Statement Detail Line:

- Show Invoice Detail
- Show PO# Associated with invoice
- Include Remarks

Message to Print on Statements:

CAP Software
7250 West Vickery Blvd.

Print Statements Preview Statements

Note Accept Esc Cancel

Status:

Item Sale Detail



Statement History

- Run Statements for 'All Transactions'
- Include Credit Balances
- Set to Preview
- This will take some time to run. Then save as PDF
- Allows you to view all transactions for each unit account
- You can then audit any transactions in question
- Compare this to current SellWise Account History

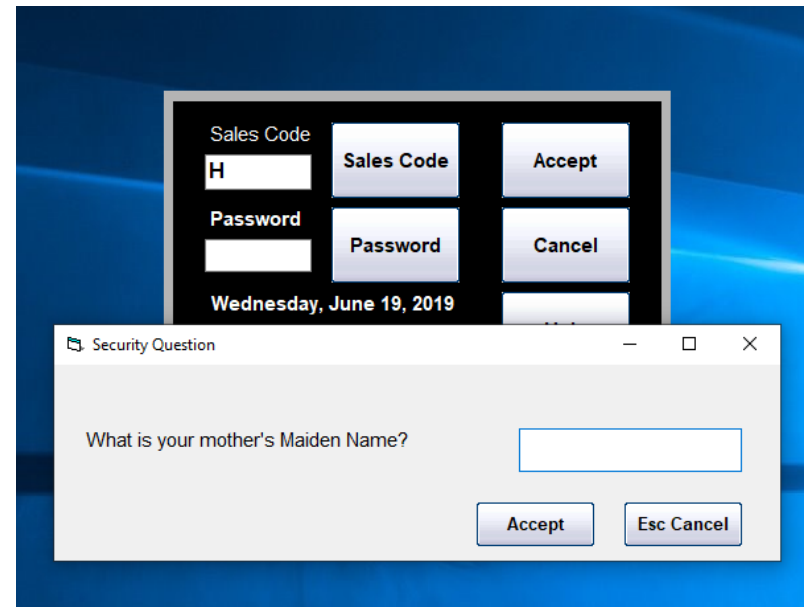
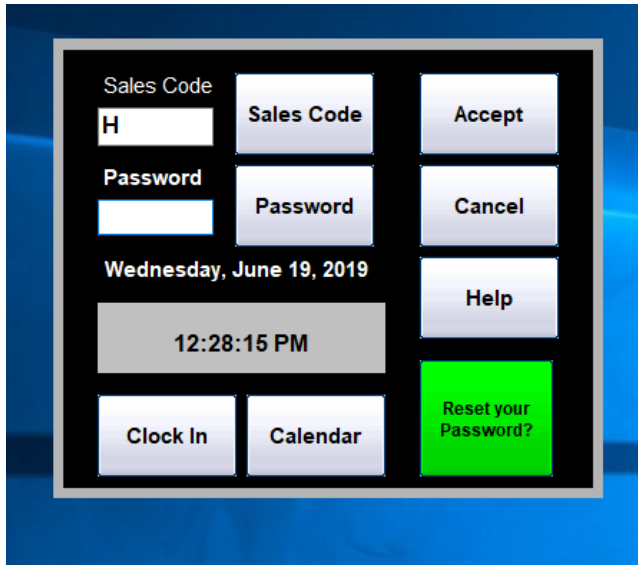


Password Reset Utility

- Included in the update when you call
- Must be turned ON in Store Settings
- Users MUST setup their questions. Do Not Select 'Cancel' when prompted to setup questions
- If locked out, Press the Green button at login to access your security questions



Password Questions



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



SellWise User Group

Thursday, May 23rd, 2019

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



- Chat Alt+H
- 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

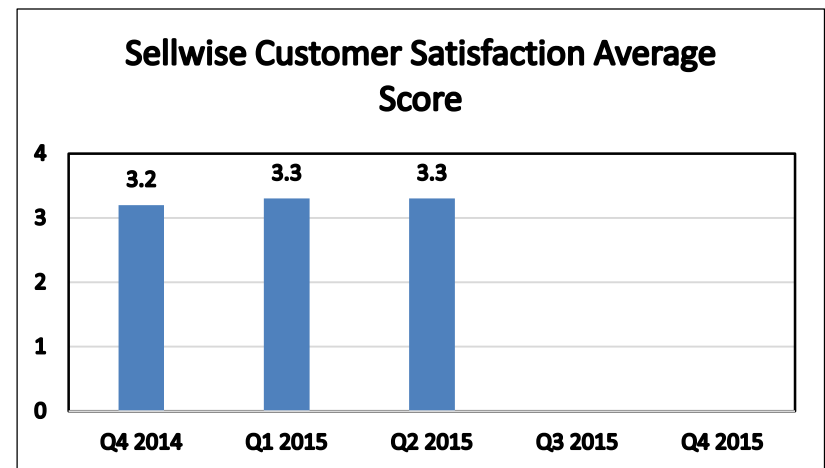
Common Myth: Inventory is once a year

- 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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Prepared. For Life.®

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 Support

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- 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**
- Council Fund Development
- Council Financial Training

Home > Council Support > Financial Services > Council Financial Management

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
Read the [Frequently Asked Questions](#)
View the [LiveStream presentation](#)

[5-Year Financial Planning](#)
[5-Year Financial Plan with Membership Tracking](#)
[Budget Building Materials](#)
[Fiscal Documents](#)
[Payroll / Personnel](#)
[Sample Policies](#)
[PeopleSoft Documents](#)

- [Accounts Payable](#)
- [Asset Management](#)
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- [Bank Reconciliation](#)
- [Budget Tools](#)
- [Communications](#)
- [General Ledger](#)
- [Month End](#)
- [Point Of Sale](#)
- [PeopleSoft User Group](#)
- [PeopleSoft BSA User Guide](#)
- [Year End](#)

[SellWise Support](#)

- [Document Library](#)
- [User Group Information](#)



QUESTIONS!

Next Meeting

Thursday, September 19

10:00 am CT

2:00 pm CT

