

SellWise User Group

Thursday, October 24th, 2019

Presenters

Will Atkinson, President – CAP/Sellwise

Cornelia Ellis, Fiscal Management Specialist



User Group Topics

- SellWise User Training
- Account adjustment
- Making a “no sales” list
- Mail Codes in CAP Names
- Password Reset Utility
- Inventory Checker Time
- Updates



SellWise User Training

- Do you have staff that need SellWise training?
- CAP will host additional group calls in November open to all staff needing user training
- The schedule will be communicated next week
- The trainings will be recorded and hosted



Training Time

- Account adjustment
 - If you record a sale for the wrong item or wrong cash receipt code, use a reversing transaction instead of void
 - This creates a much cleaner trail for auditing
 - Ring up item in the wrong code, choose return, ring up in new code and sell it with a net of zero



Making a “has not been sold” list

- No sales
 - Every item has a flag for whether it has sold or not
 - We can create a list of those items which “have not been sold”
 - This is in inventory, then custom list



“Has Not Been Sold” List

Stock Locater	105378.	Description	Emb Gen PWD 2014
Vendor Item #	618769	Sub-Description	
		UPC(s)	
Unit of Measur	EA - Each		

Main	Additional Information																																						
<p>Cost/Price</p> <table> <tr> <td>Current Cost</td> <td>1.09</td> <td>Margin</td> <td>21.58 %</td> </tr> <tr> <td>Actual Cost</td> <td>1.09</td> <td>Markup</td> <td>27.52 %</td> </tr> <tr> <td>List Price</td> <td>1.39</td> <td></td> <td></td> </tr> </table> <p>Ordering Information</p> <table> <tr> <td>On Hand</td> <td>492</td> <td>Maximum</td> <td>1</td> </tr> <tr> <td>On Order</td> <td>0</td> <td>Minimum</td> <td>0</td> </tr> <tr> <td>Qty / Pack</td> <td>1</td> <td>Has Sold</td> <td>No</td> </tr> <tr> <td>Re-Order</td> <td>No</td> <td>Last Sold</td> <td></td> </tr> </table>	Current Cost	1.09	Margin	21.58 %	Actual Cost	1.09	Markup	27.52 %	List Price	1.39			On Hand	492	Maximum	1	On Order	0	Minimum	0	Qty / Pack	1	Has Sold	No	Re-Order	No	Last Sold		<table> <tr> <td>Tax Code</td> <td>A 7.00%</td> </tr> <tr> <td>Vendor</td> <td>1001</td> </tr> <tr> <td>Alt. Vendor</td> <td></td> </tr> <tr> <td>Department</td> <td>Dept Code</td> </tr> <tr> <td></td> <td>019.000.000 In</td> </tr> </table>	Tax Code	A 7.00%	Vendor	1001	Alt. Vendor		Department	Dept Code		019.000.000 In
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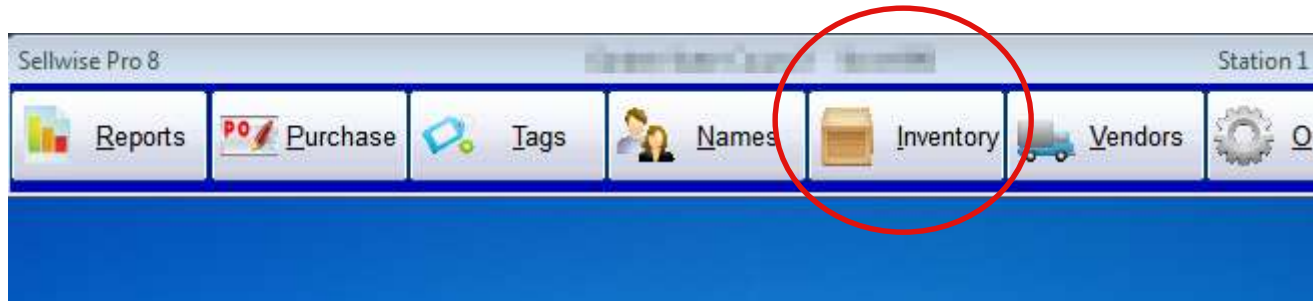


“Has Not Been Sold” List

Stock Locator	5750.	Description	Kit PWD Grand Prix
Vendor Item #	17006	Sub-Description	
Unit of Measure	EA - Each	UPC(s)	730176170060
Main		Additional Information	
Cost/Price		Tax Code A 7.00%	
Current Cost	2.49	Margin	37.59 %
Actual Cost	1.8408	Markup	60.24 %
List Price	3.99	Vendor	1001
		Alt. Vendor	
		Department	Dept Code Dept --Sub I
			018.000.000 Handicrafts
Ordering Information			
On Hand	-1149	Maximum	0
On Order	0	Minimum	0
Qty / Pack	1	Has Sold	Yes
Re-Order	Yes	Last Sold	12/11/2013
Notes			



“Has Not Been Sold” List



“Has Not Been Sold” List

Kit Regatta Balsa		2291.	17090
KIT REGATTA CONVERSION		4632.	7810
Kit Repair Pad Thermarest		17360.	616994
Kit Repair Tent 36pk@		9774.	1714
Kit Rig Big 100 Wheeler		9332.	24342
Kit Robotics Ollo Bug		13830.	612752
Kit Robotics Bulk Pack		4000.	610750

Search Criteria --Description

F3 Use Wildcard Search

Help Custom List



“Has Not Been Sold” List

List Setup

Report Title Inventory Information

Selection Criteria

Qty on Hand	Greater than	0
Has Sold		No

Sorted By

Stock Locator item ID Description

Sub-Description

F9 Set Range

Range

Start 100 End D8797

Output To

Print Preview Text File Excel

Print Tags Payroll Format

Printer Orientation

Portrait Landscape

Select Information to Include

- S/L
- Sub Descrip
- List Price
- Current Cost
- Margin
- Markup
- Qty On Order
- Max
- Min
- Qty in Pack
- Mix'n Max Code
- Vendor Code
- Price Inc. Tax
- Re Order
- Last Date Sold
- Serialized
- Tax Code
- Food Stamp
- Store Ref.
- UPC
- Loc. Front
- Loc. Back
- Kit

Selected Information

- Item ID
- Description
- Qty on Hand
- Avg Cost
- T.Avg.Cost
- Has Sold

List Notes

Report Page Width 76% Filled



“Has Not Been Sold” List

Item #	Description	Unit Cost	Current Price	Original Price	Status
618477	Tee Hikeosaurus Red T5/6	1.00	11.99	11.99	No
618664	Dvd Are You Tougher Than A Bs	1.00	22.95	22.95	No
618721	Emb Patrol Bison 2013	12.00	1.39	16.68	No
618724	Emb Patrol Bull	12.00	1.39	16.68	No
618725	Emb Patrol Bulldog	12.00	1.39	16.68	No
618726	Emb Patrol Computer Geek	12.00	1.39	16.68	No
618727	Emb Patrol Coyote	12.00	1.39	16.68	No
618731	Emb Patrol Game Master	12.00	1.39	16.68	No
618733	Emb Patrol Knight	12.00	1.39	16.68	No
618734	Emb Patrol Native American	12.00	1.39	16.68	No
618735	Emb Patrol Ninja	12.00	1.39	16.68	No
618736	Emb Old Patrol Goat	24.00	1.39	33.36	No
618739	Emb Patrol Robot	12.00	1.39	16.68	No
618740	Emb Patrol Squirrel	12.00	1.39	16.68	No
618741	Emb Patrol T-Rex	12.00	1.39	16.68	No
618765	Decal BSA Power	1.00	18.99	18.99	No
618769	Emb Gen PWD 2014	492.00	1.09	536.28	No
618784	Kit Chem C100 Test Lab	2.00	9.99	19.98	No
618785	Kit Physics Force and Pressure	2.00	9.99	19.98	No
618786	Kit Physics Simple Machines	2.00	9.99	19.98	No
618837	Charm Aol	1.00	3.49	3.49	No
618838	Charm Campfire	1.00	3.49	3.49	No
618839	Charm Hiking Boot	1.00	3.49	3.49	No
618840	Charm Wall Tent	1.00	3.49	3.49	No
618841	Cover Fieldbook 2013	4.00	7.49	29.96	No
619045	P/C Scout Sunday 2014	4.00	7.49	29.96	No
64073	Neck Navy/silver Embrd	12.00	6.99	83.88	No
68524	Belt Lthr Ant 24	1.00	21.99	21.99	No
68528	Belt Lthr Ant 28	2.00	19.99	39.98	No
68690	Pant Vt Swb Men Xsma	1.00	20.99	20.99	No
68793	Pant Vt Swb Ldy Lg	1.00	20.99	20.99	No
7591	Plaq Rainutter Regatta	1.00	14.35	14.35	No
7592	Plaq Space Derby	1.00	14.35	14.35	No
82995	Shrt CS LS Yth 2xl	2.00	18.26	36.52	No
969	Pin Veteran Scouter 55 Yr	4.00	4.45	17.80	No
97	Pin Lapel Organizer	6.00	7.99	47.94	No
970	Pin Veteran Scouter 5 Yr	2.00	4.45	8.90	No
C20615	Segment 1 Year Red	24.00	0.42	10.08	No
C20617	Segment 2 Year Red	24.00	0.42	10.08	No
Totals for the 169 Records Listed					
		1329.00		4086.65	



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



Mail Codes in CAP Names

- Please be sure to follow the naming conventions when adding new troops/packs.
- We've had some councils encounter issues with adding new troops, especially the new female units
- The AR Code should be the correct Prefix, plus the unit number.
- S350 or T350, etc.

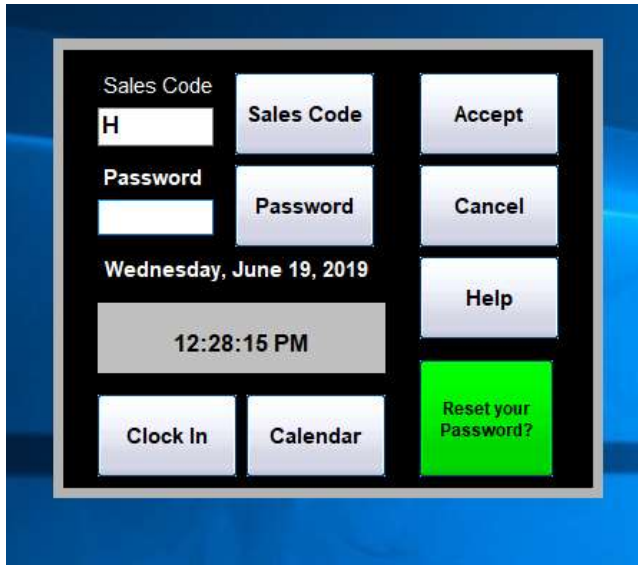


Password Reset Utility

- 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



Inventory Checker

- It's almost that time of year!
- If you are not performing monthly/quarterly inventory counts, it's time to prepare for EOY
- Please order any rental units now. We rent them weekly
- Prepare to close and count your physical store
- Inventory checker manuals/videos are here:

<http://www.capretail.com/bsasupport/>



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

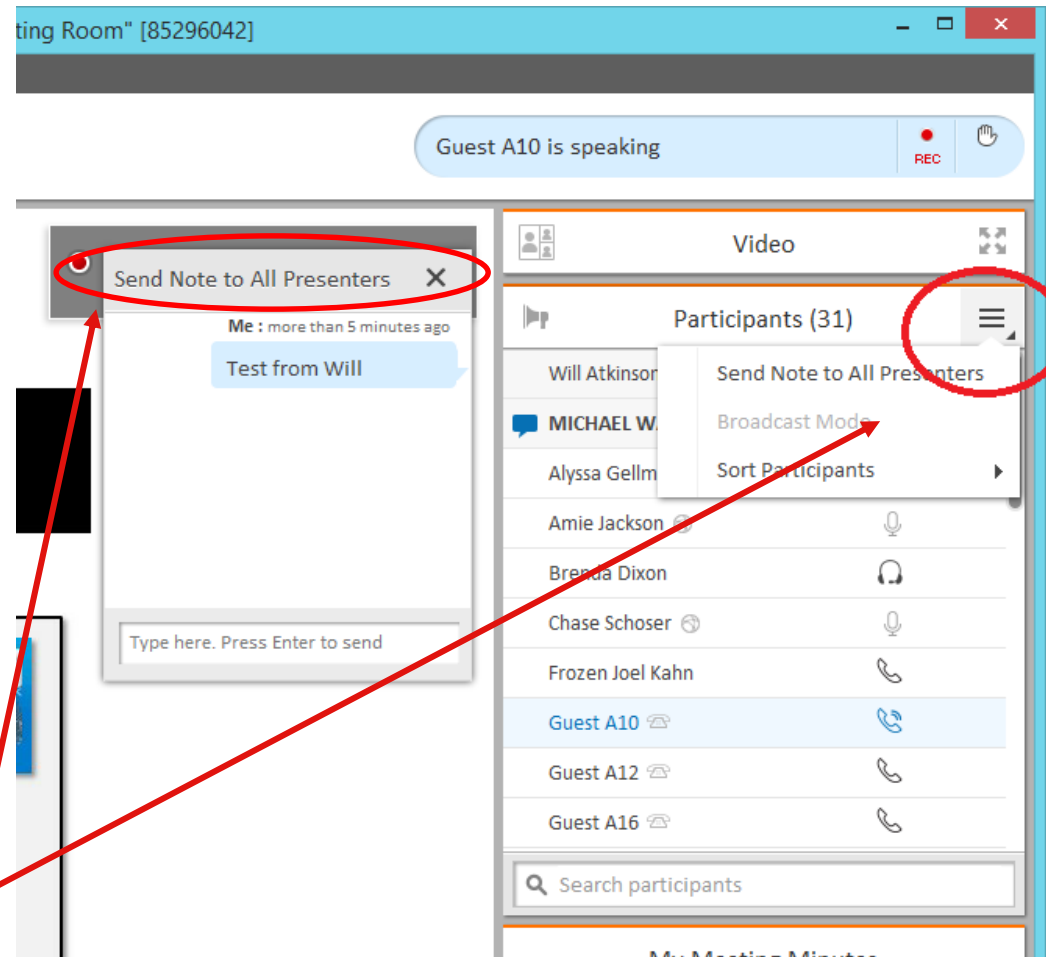
Updates

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



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



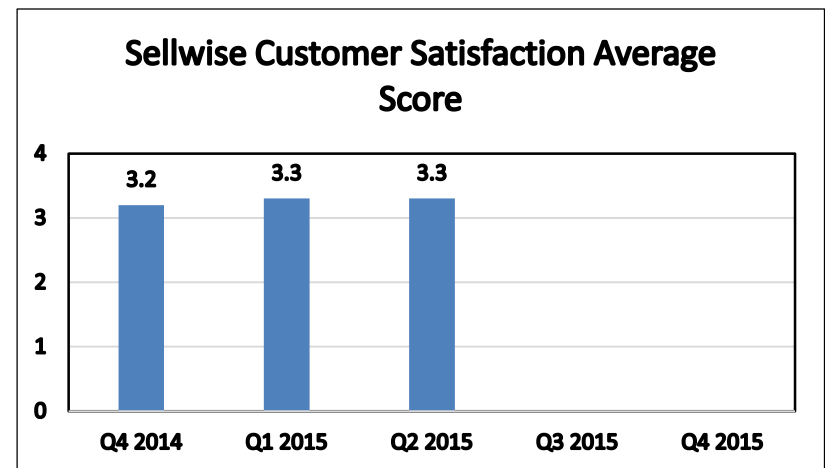
Common Myth: Inventory is once a year

- 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', and a link to 'View the LiveStream presentation'. Below this is a section for 'Preferred Service Providers'.



QUESTIONS!

Next Meeting

Thursday, November 21st

10:00 am CST

2:00 pm CST

