SellWise User Group

Thursday, March 19th, 2020

Presenters

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

- Credit Card Support
- Coronavirus Support Policy
- New BSA Version Coming this year
- Inventory Checker Time
- Most common CAP Service calls
- Updates
SellWise Credit Card Support

- SellWise directly integrates to WorldPay to securely transmit credit/debit transactions
- SellWise support can assist you with any issues related to credit/debit transactions or any pinpad errors you encounter
- If you have a credit card or pinpad issue, please call SellWise Support via Member Care for the best service, not WorldPay directly
Coronavirus Support

• The Novel Coronavirus or COVID-19 is impacting retailers nationwide
• SellWise support is fully operational and we are actually bringing additional techs online
• We are NOT reducing support hours or services as a result of COVID-19, so please continue to contact us for any assistance you need
New BSA Version!

SellWise is getting a facelift later this year, here is a preview.

– New VB.NET POS interface
– Enhanced features and functionality
– Additional cloud reporting functionality
– Sleek, modern look
– User customizable
– No additional cost to Councils
– To be released late Summer
New Screenshots
HotKeys
Exceptions

![Image of POS system with Exception options]
Tender

<table>
<thead>
<tr>
<th>Quantity</th>
<th>SL</th>
<th>Description</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>~NONSTK</td>
<td>Food</td>
<td>$99.00</td>
<td>$99.00</td>
</tr>
<tr>
<td>4</td>
<td>~NONSTK</td>
<td>Food</td>
<td>$26.50</td>
<td>$106.00</td>
</tr>
</tbody>
</table>

Subtotal: $205.00
Tax: $0.00
Total: $205.00

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Prepared. For Life.
Password Reset Utility

• 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
• Please train your staff to have you call for training on how to unlock users.
Password Questions

Sales Code
H
Password
Password
Wednesday, June 19, 2019
12:28:15 PM
Clock In
Calendar
Accept
Cancel
Help
Reset your Password?

Security Question

What is your mother's Maiden Name?

Accept
Esc Cancel
SellWise Update

• In April, we will have a new build of the current BSA version that includes several enhancements

• The main addition is support for direct e-mailing of SellWise forms in Windows 10 for those sites that have had issues.

• If you have e-mail issues, contact SellWise support for the update in April.

• We will publish a release date for this update
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 bottom of your screen
2. Click on “chat”
3. Type in your question and hit enter to send to all participants
Common Myth: Inventory is once a year

• Truth – Inventory is a weekly process

• Check **twenty** 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
Slides and recording posted on scouting.org/financeimpact
Look on the Council Administration Tab, then look at the bottom for SellWise Support/User Group Information
QUESTIONS!

Next Meeting
Thursday, April 16th
10:00 am CST