

# SellWise User Group

Thursday, March 19<sup>th</sup>, 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

CAP Retail Wed. Jan. 29, 2020 - Station 1 | John (ID)

Price Check Quantity Item Names Home Hot Keys Open Dept Operations Exceptions Remarks Help

Item

Quantity	SL	Description	Price	Total
1	~NONSTK	Food	\$99.00	\$99.00
4	~NONSTK	Food	\$26.50	\$106.00

Subtotal \$205.00  
Tax 0.00  
Total \$205.00

\$1 \$5 \$10 Open Item Almond Joy  
\$20 \$50 \$100 Turns Ultra Strength LOUTTOUT  
Exact Change  
Cash Food Stamps Check EDC Credit Card  
Pulse Pay PayPal Online Order Gift Card TBD  
11% Discount 15% Discount 20% Discount  
Printer On Sales Clerk Pay Now



# HotKeys

CAP Retail Wed, Jan. 29, 2020 - Station 1 | John (ID)

Price Check Quantity Item Names Home Hot Keys Open Dept Operations Exceptions Remarks Help

Item

Quantity	SL	Description	Price	Total
1	~NONSTK	Food	\$99.00	\$99.00
4	~NONSTK	Food	\$26.50	\$106.00

Product Product Product Product  
Product Product Product Product  
Product Product Product Product  
Product Product Product Product

Cash Food Stamps Check EDC Credit Card

11% Discount 15% Discount 20% Discount

Subtotal \$205.00  
Tax 0.00  
Total \$205.00

Printer On Sales Clerk Pay Now



# Exceptions

CAP Retail Wed. Jan. 29, 2020 - Station 1 | John (ID)

Price Check Quantity Item Names Home Hot Keys Open Dept Operations Exceptions Remarks Help

Item

Quantity	SL	Description	Price	Total
1	-NONSTK	Food	\$99.00	\$99.00
4	-NONSTK	Food	\$26.50	\$106.00

Subtotal \$205.00  
Tax 0.00  
Total \$205.00

Sale

Item

Cancel Dollar Disc Cancel Price

Return 10% Discount Return Tax Exempt

Discount % 15% Discount Discount % Vendor Coupon

No Sale 20% Discount Sales Code Store Coupon

Tax Exempt 25% Discount Quantity Dollar Disc

Exit POS

Printer On Sales Clerk Pay Now





# Tender

CAP Retail Wed. Jan. 29, 2020 - Station 1 | John (ID)

Price Check Quantity Item Names Home Hot Keys Open Dept Operations Exceptions Remarks Help

Item

Quantity	SL	Description	Price	Total
1	-NONSTK	Food	\$99.00	\$99.00
4	-NONSTK	Food	\$26.50	\$106.00

Subtotal 0.00  
 Total Tax 0.00  
 Total Sale 0.00  
 Tip 0.00  
 Svc 0.00  
 - 0.00  
 - 0.00  
**Total Charge 0.00**  
 Amount Due 0.00

Accept Gift Receipt  
 Cancel Add Tip  
 Email

\$1 \$5 \$10  
 \$20 \$50 \$100  
 Exact Change

Cash Food Stamps Check EDC Credit Card  
 Pulse Pay PayPal Online Order Gift Card TBD

Printer On Sales Clerk **Pay Now**

Subtotal \$205.00  
 Tax 0.00  
**Total \$205.00**

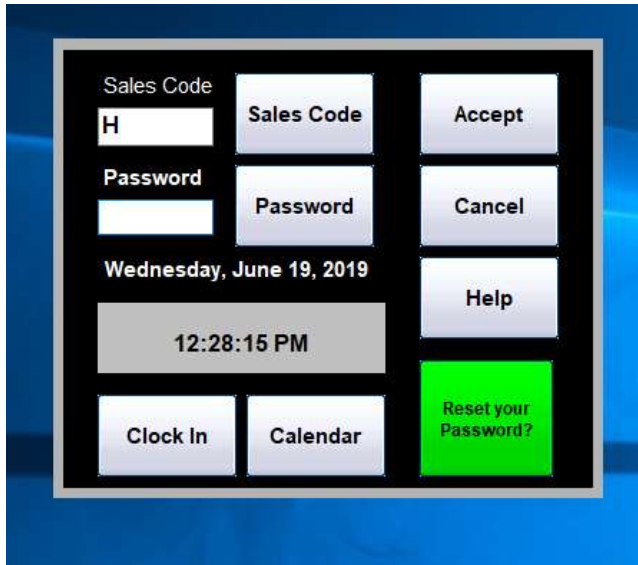


# Password Reset Utility

- 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



# 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

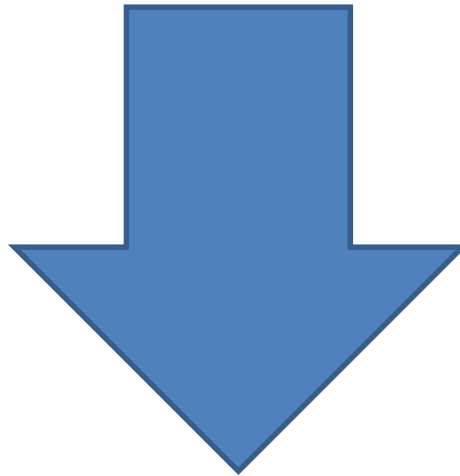


# Updates

- 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](https://scouting.org/financeimpact)  
Look on the Council Administration Tab, then look at the bottom for SellWise Support/User Group Information

**Council Support**

- Council Management Support
- Contact Council Management Support
- 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

[Home](#) > [Council Support](#) > [Financial Services](#) > [Council Funding and Finance](#) > [Council Administration](#)

## Council Administration

The sections below provide tools for Council staff to assist them in the proper m This is designed for staff use but may provide detailed information to volunteers topics.

Human Resources Support (need to create a new landing page for this)

Membership Verification Support (need to create a new landing page for this)

### Blackbaud CRM Support

### PeopleSoft Support

- [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](#)
- [Year End](#)

### SellWise Support

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



# QUESTIONS!

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

