

SellWise User Group

Thursday, April 30, 2020

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



User Group Topics

- Coronavirus Support Policy Reminder
- Remote Access Do's and Don'ts.
- Moving Money Between GL Accounts
- New CAP Version Screenshots
- SellWise Update
- Most common CAP Service calls
- Updates



Coronavirus Support

- The Novel Coronavirus or COVID-19 is impacting retailers nationwide
- SellWise support is fully operational and we are actually bringing new 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



Remote Access Guidelines

- DO use a robust remote access client. Juniper SSLVPN available from National. Others: GoToMyPC, LogMeIn, Join.me
- DON'T use freeware or leave firewalls open
- DO close connections when not in use
- DON'T take your PC home to connect to SellWise via the internet. You MUST remote into your office PC on the network
- DO process registrations, fees, item orders, etc.



Remote Access Guidelines

- DO process Cash, Check, and On Account Payments.
- DON'T try to key in credit cards via remote access. Store card numbers securely until they can be keyed in on your secure device.
- DO access your Cloud programs such as Scoutnet, Peoplesoft, etc.
- DON'T hesitate to call us with questions



Moving Funds Between Unit Deposit Accounts

- You added funds to the wrong Unit Account
- How do you correct it?
- You need to take funds from the wrong account and move to the correct account
- This is two separate transactions:
 - First to remove the funds
 - Second to put them where they belong



Moving funds – first transaction

- Bring up the Unit Account where the funds were added (wrong account)
- Determine the amount to move (\$50.00)
- Find the item called “unit account adjustment”
- Charge \$50 to that item
- Complete transaction by “tendering” to “on account”



Moving funds – second transaction

- Bring up the unit account where the funds should go
- Find the item called “unit account adjustment”
- Charge \$50 to that item
- Click on Exceptions and then “return”
- Complete transaction by “tendering” to “on account”



Moving funds between accounts

- By using the “unit account adjustment”, this transaction made two entries which zero out in the General Ledger
- Unit Account Adjustment should have a GL account in Subdescription of 12341#####
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Upcoming SellWise Refresh



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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
\$20 \$50 \$100
Exact Change

Open Item Almond Joy
Turns Ultra Strength LOUTTOUT

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: Cancel, Dollar Disc, Return, 10% Discount, Discount %, 15% Discount, No Sale, 20% Discount, Tax Exempt, 25% Discount

Item: Cancel, Price, Return, Tax Exempt, Discount %, Vendor Coupon, Sales Code, Store Coupon, 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 Exact Change
 \$20 \$50 \$100

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



SellWise Update

- Next week, 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



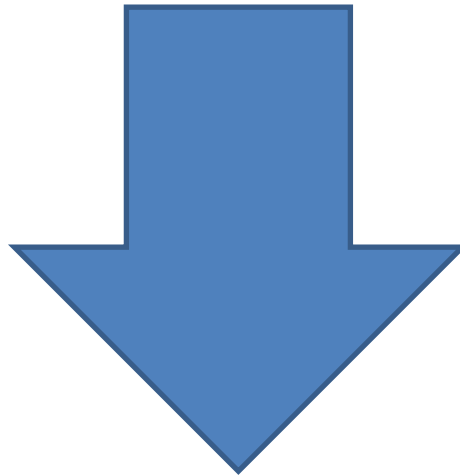
Updates

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



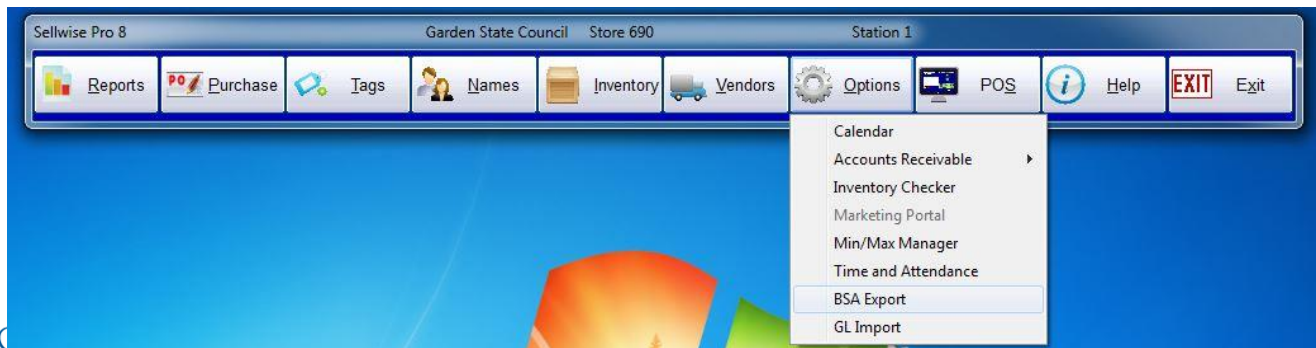
If you have questions:

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 **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



Slides and recording posted on scouting.org/financeimpact
Look on the *Council Administration* link, then look at the bottom for Sellwise Support/User Group link

Join Give Shop My.Scouting Login

Home > Council Support > Council Funding and Finance

Council Funding a

Funding a Council and assuring proper financial management Council Board. The material presented in this Section prov This is designed to be used by both Volunteers and Council

- [Financial Planning](#)
- [Funding the Council](#)
- [Council Administration](#)
- [Local Council Financial Audits](#)
- [Back Office Business Solutions](#)
- [BSA-COVID-19 Financial Resources](#)

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
- Council Funding and Finance**
- Financial Planning
- Funding The Council
- Council Administration**



QUESTIONS!

Next Meeting

Thursday, May 28st

10:00 am CST

