

SellWise User Group

Thursday, June 25th, 2020

Presenters

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



User Group Topics

- Coronavirus Support Policy Reminder
- Windows 10 Upgrades
- 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



Windows 10 Upgrade

- Reminder: Windows 7 EOL January 14, 2020
- No more security update or support for Win7
- Can upgrade existing PC to Win 10
- Or Buy new PCs
- Win 10 is fully supported by SellWise
- You do NOT need to purchase any new SellWise SW.
- You DO need to upgrade to Pervasive 13 if on an older version. Cost is \$125 per computer



Windows 10 Upgrades

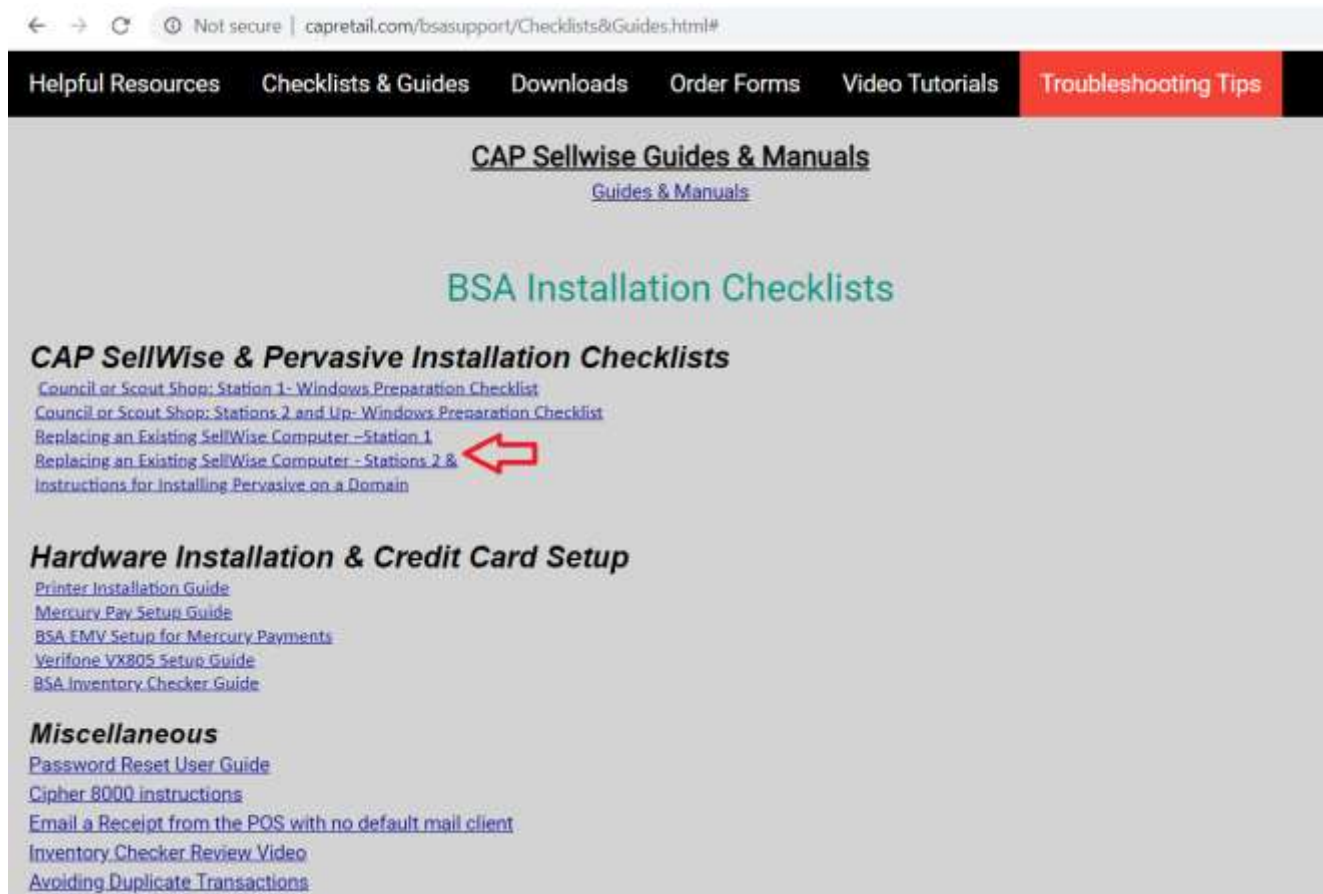
- Installation can be done by Council IT staff or contractors using online guides here:

www.capretail.com/bsasupport

To get the order form for Pervasive 13, e-mail

bsaorders@capretail.com

Windows 10 Upgrades



The screenshot shows a web browser window with the address bar displaying "Not secure | capretail.com/bsasupport/Checklists&Guides.html#". The website has a navigation menu with the following items: "Helpful Resources", "Checklists & Guides", "Downloads", "Order Forms", "Video Tutorials", and "Troubleshooting Tips". The main content area is titled "CAP Sellwise Guides & Manuals" and "Guides & Manuals". Below this, there is a section for "BSA Installation Checklists". Underneath, there are three sub-sections: "CAP SellWise & Pervasive Installation Checklists", "Hardware Installation & Credit Card Setup", and "Miscellaneous". A red arrow points to the link "Replacing an Existing SellWise Computer - Stations 2 & 3" in the first sub-section.

← → ↻ 🔒 Not secure | capretail.com/bsasupport/Checklists&Guides.html#

Helpful Resources Checklists & Guides Downloads Order Forms Video Tutorials Troubleshooting Tips

CAP Sellwise Guides & Manuals
[Guides & Manuals](#)

BSA Installation Checklists

CAP SellWise & Pervasive Installation Checklists

- [Council or Scout Shop: Station 1- Windows Preparation Checklist](#)
- [Council or Scout Shop: Stations 2 and Up- Windows Preparation Checklist](#)
- [Replacing an Existing SellWise Computer - Station 1](#)
- [Replacing an Existing SellWise Computer - Stations 2 & 3](#) ←
- [Instructions for Installing Pervasive on a Domain](#)

Hardware Installation & Credit Card Setup

- [Printer Installation Guide](#)
- [Mercury Pay Setup Guide](#)
- [BSA EMV Setup for Mercury Payments](#)
- [Verifone VX805 Setup Guide](#)
- [BSA Inventory Checker Guide](#)

Miscellaneous

- [Password Reset User Guide](#)
- [Cipher 8000 instructions](#)
- [Email a Receipt from the POS with no default mail client](#)
- [Inventory Checker Review Video](#)
- [Avoiding Duplicate Transactions](#)



Windows 10 Upgrades

- CAP Support can perform the upgrade for you for \$120 per machine
- Scheduled appointment required
- Reminders:
 - Get Windows 10 or new PCs
 - Get Pervasive Licensing if needed
 - Ensure users have Admin/Install permissions
 - Use online guides or schedule with CAP



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

- New BSA Update Available
- 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 at any time



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



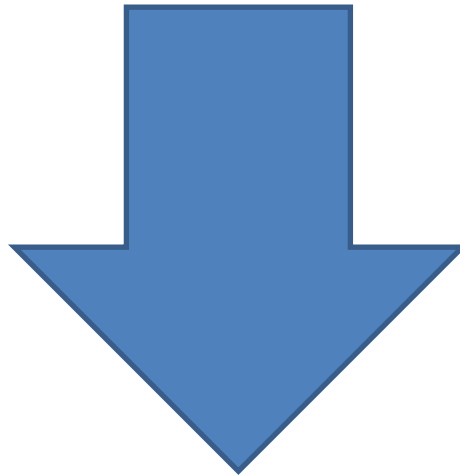
Updates

- How to ask Questions of the presenters
- Inventory myth
- Where this presentation is located online



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

The screenshot shows the Boy Scouts of America website's navigation menu and a page titled "Council Funding and Finance". The navigation menu on the left includes "Council Support", "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", and "Funding The Council". The "Council Funding and Finance" menu item is highlighted in green. The "Council Administration" link under "Funding The Council" is highlighted in yellow and circled in red. The main content area shows the breadcrumb "Home > Council Support > Council Funding and Finance", the title "Council Funding a", and a description: "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". Below the description are links for "Financial Planning", "Funding the Council", "Council Administration", "Local Council Financial Audits", "Back Office Business Solutions", and "BSA-COVID-19 Financial Resources".



QUESTIONS!

Next Meeting

Thursday, August 20

10:00 am CST

