

SellWise User Group

Thursday, August 20, 2020

Presenters

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



User Group Topics

- Expanded CAP Support team
- Adding Cash Receipt Items
- New CAP Version Screenshots
- Most common CAP Service calls
- Updates



Expanded CAP Support Team

- CAP has partnered with POS Nation, a leading POS reseller, to provide expanded support
- Fully trained helpdesk in Charlotte, NC
- 9+ additional techs available
- The Charlotte team can handle basic calls
- The Fort Worth team is here to assist as always



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



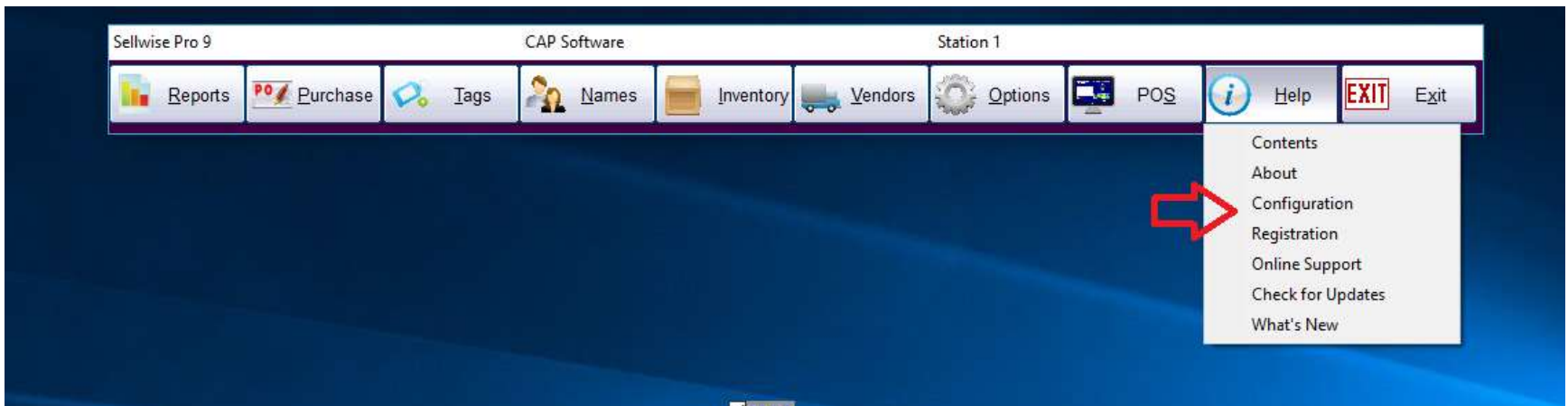
Adding Cash Receipt Items

- All fees and cash receipt items must be added to the SellWise inventory
- Must Include:
 - Description of Event/Fee
 - GL # in Sub-description (no spaces or dashes)
 - Vendor 90
 - Department 90
 - Non-decrementing = Y



Adding Cash Receipt Items

- Verify Vendor 90 and Department 90 are present.



Department 90

ERP Software Configuration

Station #1
DataPath: C:\BSATEST

Store1

Station Settings

- Station Settings
- Station Hardware
- System

Store Settings

- Store Settings
- Sales Codes & Security
- Order Settings
- Cash Drop / Check Cashing / Lottery / Layaway / Freight Buyer / Deliveries
- Invoices & Receipts
- Tags
- Promo/Shipping / Miscellaneous
- Utilities
- Short Cut Keys

Program Definitions

- Additional Information
- Cost Centers
- Departments
- Internal User Codes
- Membership Types
- Unit of Measure
- Terms Manager
- Templates

Exc Exit



Department 90

- You MUST add Department 90 or verify it is in your Department list

049.000.000	Socks			0	0
050.000.000	CS Bookshelf			0	0
051.000.000	BS Bookshelf			0	0
052.000.000	Ladies			0	0
053.000.000	Mens Uniform Shirts			0	0
054.000.000	Adult Pants			0	0
055.000.000	BS Kaki Shelf			0	0
056.000.000	CS Blue Shelf			0	0
057.000.000	CS Hats & Necker			0	0
058.000.000	Wood Crafts			0	0
059.000.000	Scrapbooking			0	0
060.000.000	Hall Wood Shelf			0	0
061.000.000	T-Shirts			0	10
062.000.000	Jackets			0	0
063.000.000	Normandy				10
065.000.000	Special Request			0	0
070.000.000	Advancements			0	0
088.000.000		(0	0
090.000.000	Cash Receipts			0	0



Vendor 90

- Ensure Vendor 90 is in your Vendor List. If not add Vendor 90 with vendor code '90'

Vendor Lookup

FE Vendor	FE Vendor Code	FE Last Name	First Name	Street Address	City	State	FE Zip
Bsa1000	1000	Bsa1000	Bsa1000	Bsa1000	Dallas	Tx	76000
Bsa1001	1001	Bsa1001	Bsa1001	Bsa1001	Dallas	Tx	76000
Bsa1002	1002	Bsa1002	Bsa1002	Bsa1002	Dallas	Tx	76000
BSA Vendor 90 ←	90 ←						



Item Setup

Inventory - 6407 Records

Stock Locator: 9803718. Description: Adult Registration Fees 4352

Vendor Item #: =ADULT REG.FEE Sub-Description: 1230100000

Unit of Measure: EA - Each Non-Decrementing Item

UPC(s):

Main		Additional Information		Messages	
Cost/Price					
Current Cost	0.00	Margin	%	Tax Code	Non Taxable
Actual Cost	0.00	Markup	%	Volumetric Tax \$	0.00
List Price	0.00			Vendor	90
				Alt. Vendor	
				Dept Code	Dept --Sub Dept-- Class
				Department	090.000.000 Cash Receipts
Ordering Information					
On Hand	0	Maximum	826		
On Order	0	Minimum	751		
Qty / Pack	1	Has Sold	Yes		
Currently Understocked	Yes	Last Sold	12/05/2017		
		Do not ReOrder	False		
Notes					
<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <div style="text-align: right;"> <input type="button" value="Edit"/> <input type="button" value="Find"/> </div>					

Help Add Change Delete History Print Tag Accept Cancel Esc



Non-Decrementing Item

Inventory - 6877 Record

Stock Locator: 9603718
Vendor Item #: =ADULT REG.FEE
Description: Adult Registration Fees
Sub-Description: 1230100000
UPC(s):
Unit of Measure: EA - Each
Non-Decrementing Item

4352

Main	Additional Information	Messages
Pricing Options Price Levels Promo Prices Quantity Prices	EBT Eligible: No Sell by Weight: No Sell by Dollar Amount: No Discounts Allowed: Yes Web Enabled: No Non Decrementing: Yes Commissionable: Yes Verify Age: _____ years	Mix 'n Match Code: [] View Break Pack Link to SL: [] Item Link to SL: [] Add Picture Remove Picture

Kit Item
Kit Kit Plus
Add Kit

Matrix
Matrix Root Matrix Item
View Matrix

Serialized Item
Serialized: No View Serialized View Warranty

Notes

Edit Find Next

Help Add Change Delete History Print Tag Accept Cancel



Cash Receipt Items

- Must have Vendor 90
- Must have Department 90
- Must Have Full, Valid GL Number, with no formatting, in the Sub-Description field
- If the GL# is wrong or invalid, your upload to PeopleSoft will fail.
- Item can have a set price or open dollar price.

New SW Version soon



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

New Screenshots/Timing

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
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Subtotal \$205.00
Tax 0.00
Total \$205.00

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

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

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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



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



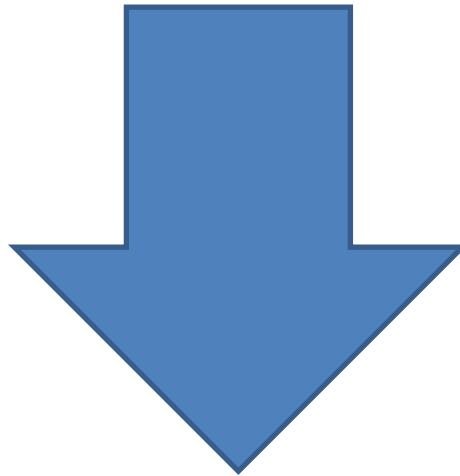
Updates

- 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. The 'Council Funding and Finance' section is highlighted in green. Within this section, the 'Council Administration' link is highlighted in yellow and circled in red. Other links in the menu include 'Council Management Support', 'Council Assessments', 'Council Board Resources', 'Council Business Practices', 'Council Fiscal Management and Training', 'Journey to Excellence', 'Financial Planning', and 'Funding The Council'. The main content area on the right shows the 'Council Funding and Finance' page with a breadcrumb trail: 'Home > Council Support > Council Funding and Finance'. The page title is 'Council Funding and Finance' and the content includes a description of the section and several sub-links: '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, September 17

10:00 am CST

