SellWise User Group

Thursday, September 17, 2020

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services

User Group Topics

- Temporary Download site
- HotKeys!
- Expanded Support
- Most common CAP Service calls
- Updates

Temporary CAP Download Site

- We are doing some website maintenance
- Please find all manuals, guides, and BSA specific software downloads here:
- http://capsupport.com/bsasupport/index.html
- Includes an Inventory Checker How-To video and a detailed guide on moving money between GL accounts, and more

Setting up HotKeys

- Use HotKeys to easily ring up small, hard to scan items, or bulky items that can't be brought to the register
- Ideal for all Cash Receipt Items
- Setup a main page and drill down menus by category or grouping
- Easily modifiable by season or year

Setting up HotKeys

- Make a list of all your items you want to put on HotKeys
- Decide on a grouping scheme
- For example: Advancements, Adults, Ranks, Merit Badges, etc.
- Build the sets of items first
- Then link the sets to buttons on the main page
- Edit as needed once you use them

Setting up HotKeys

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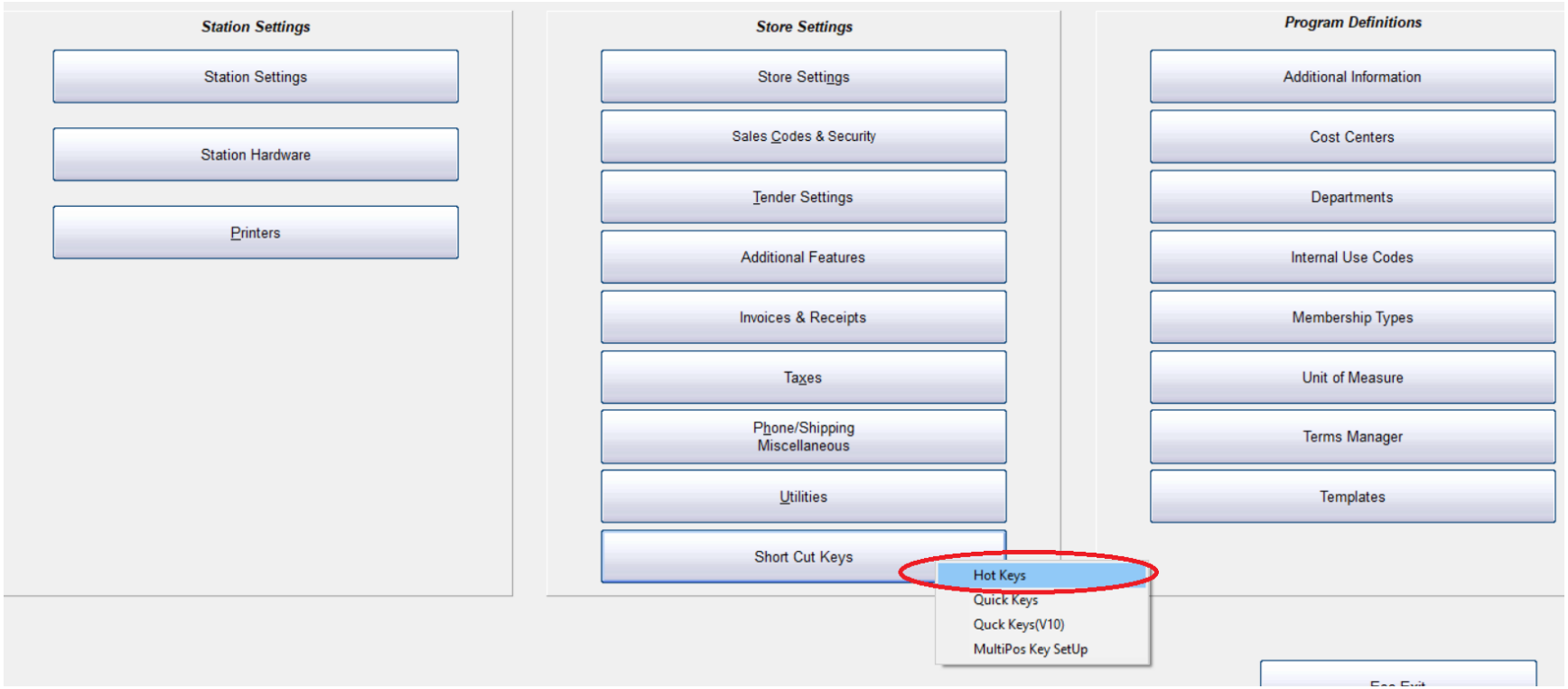

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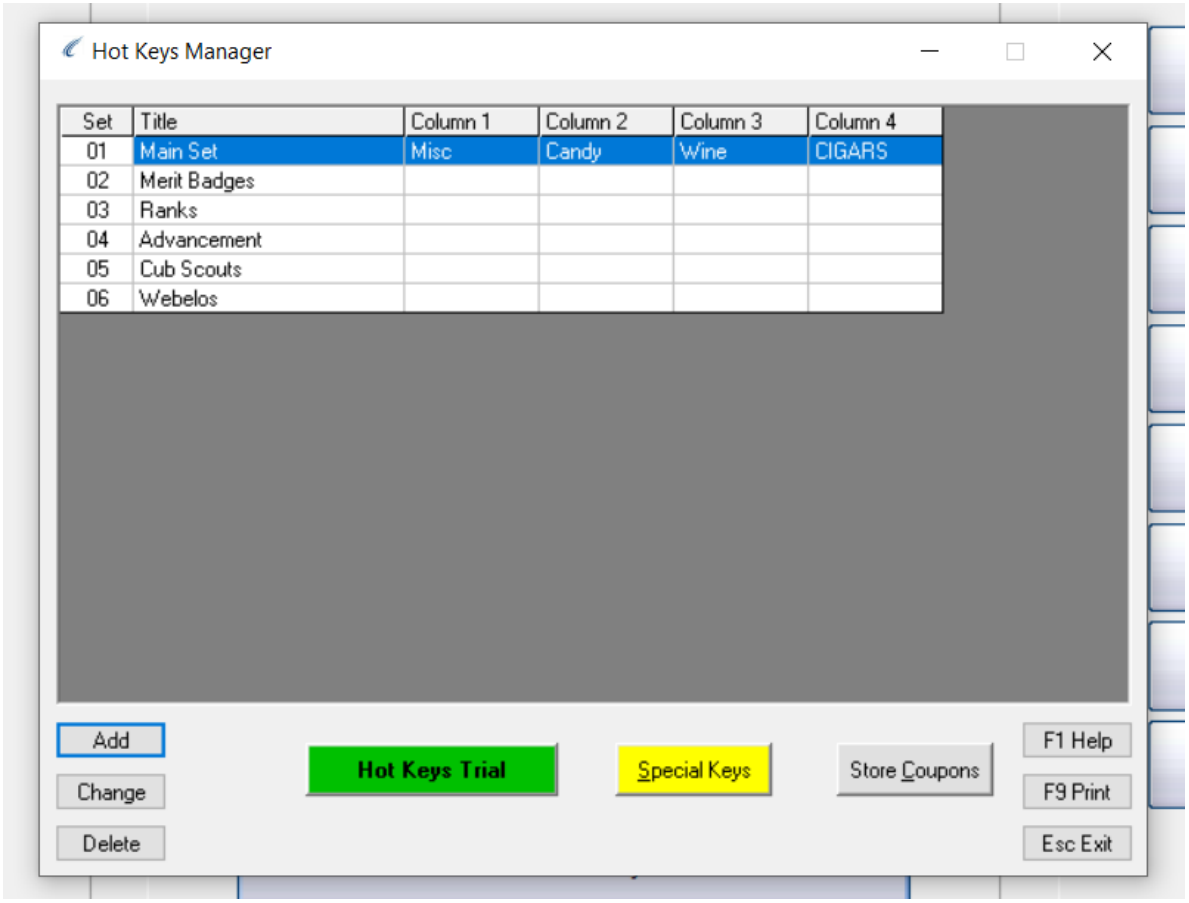

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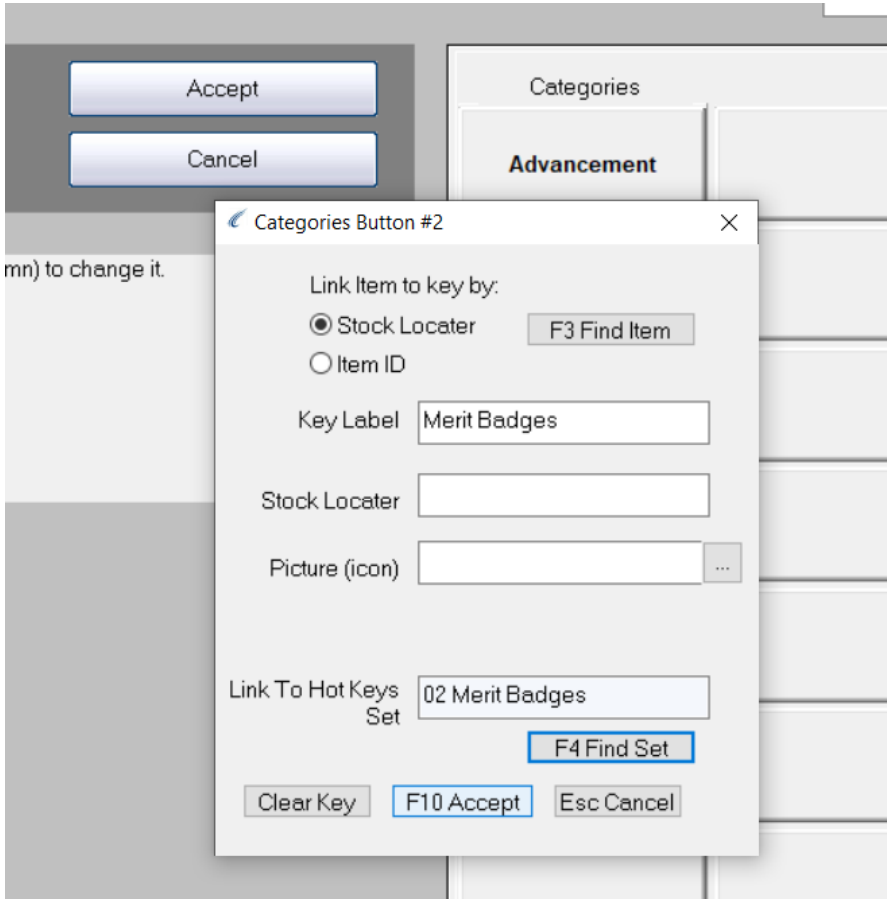

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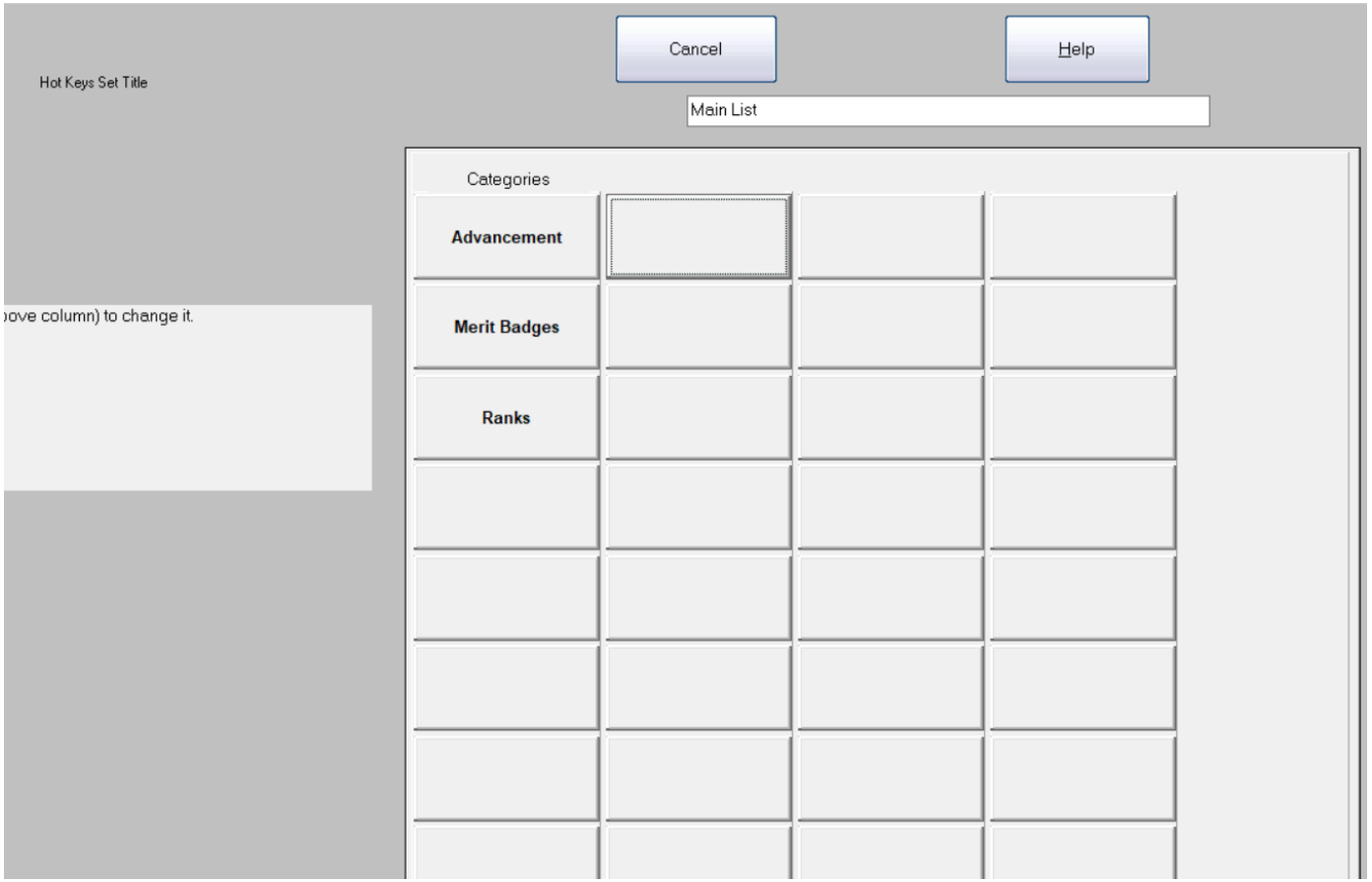

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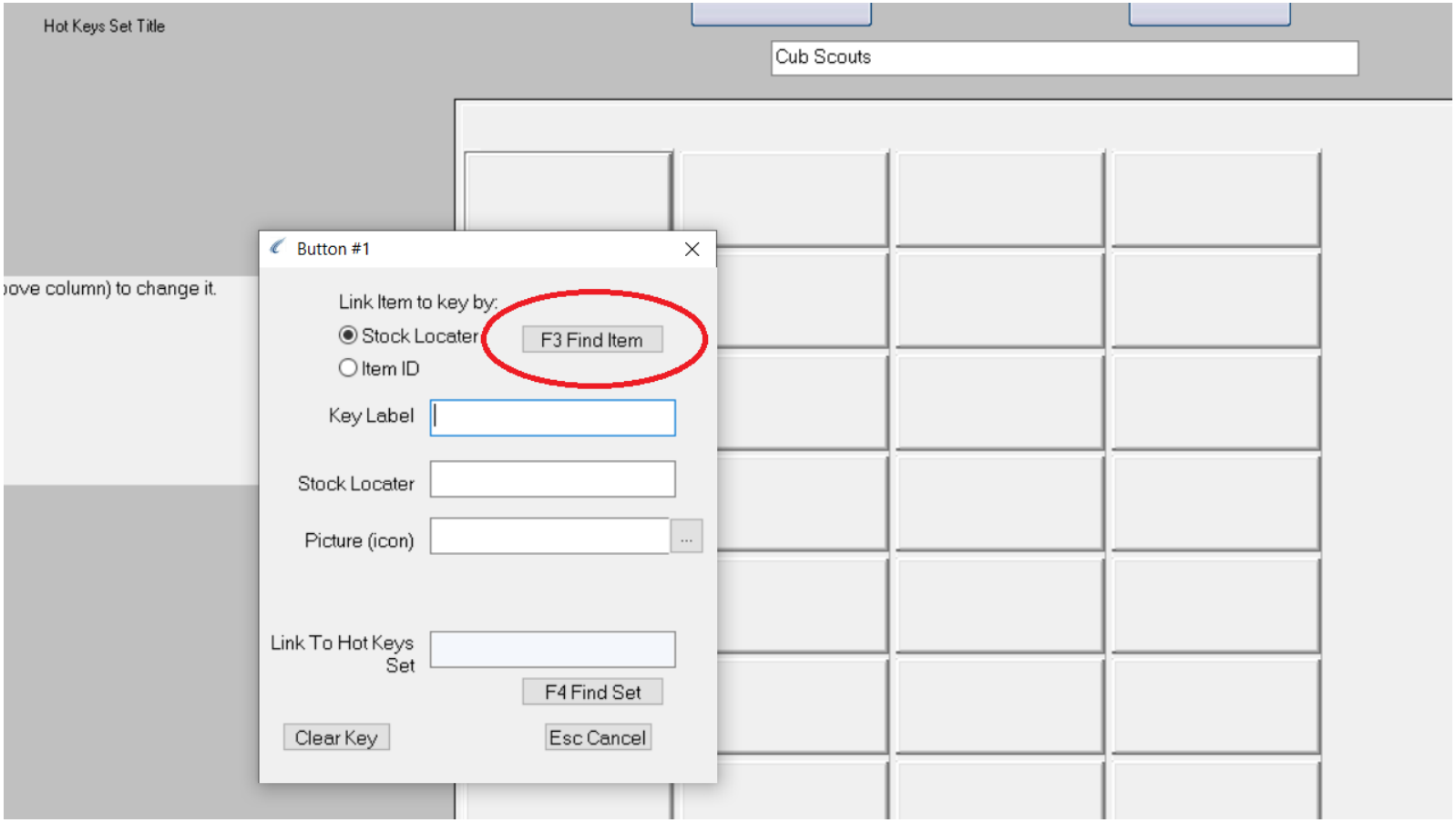


Expanded CAP Support Team

- CAP has partnered with POS Nation, a leading POS reseller, to provide expanded support
- Fully trained helpdesk in Charlotte, NC
- 10 additional techs available
- New Hours! 8am-8pm EST M-F
- The Charlotte team can handle basic calls
- The Fort Worth team is here to assist as always

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

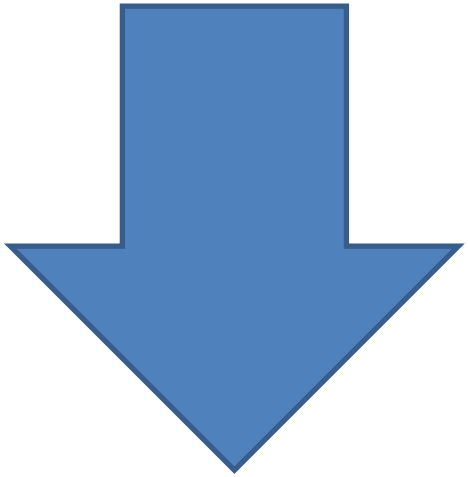
- CAP Backup
- How to ask Questions of the presenters
- Inventory myth
- Where this presentation is located online

Backing up SellWise

- Is your data secure?
- New (added cost) service available
- Scheduled backup daily, runs automatically
- Creates an encrypted file stored securely to the cloud
- Reviewed daily for success by CAP
- We contact you if your system fails to backup
- CAP will restore your system if you have a failure
- AVAILABLE NOW. Contact CAP for Pricing

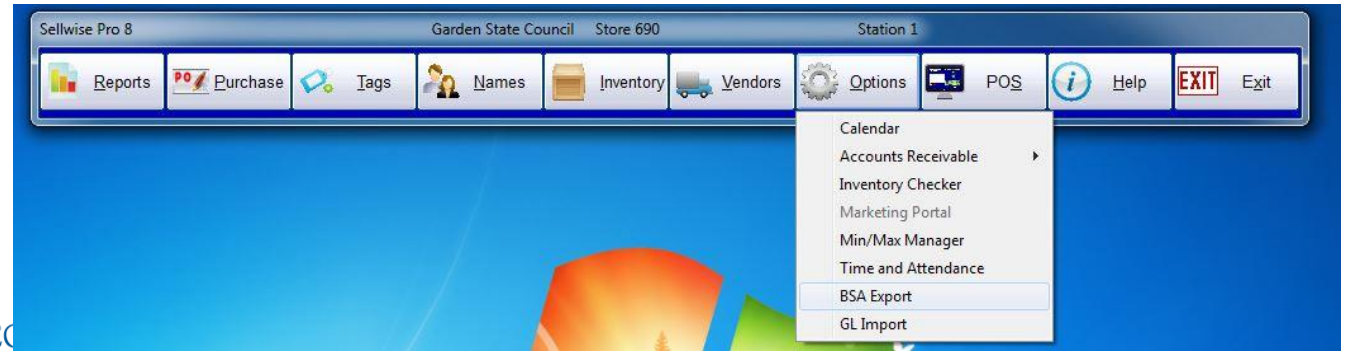
If you have questions:

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

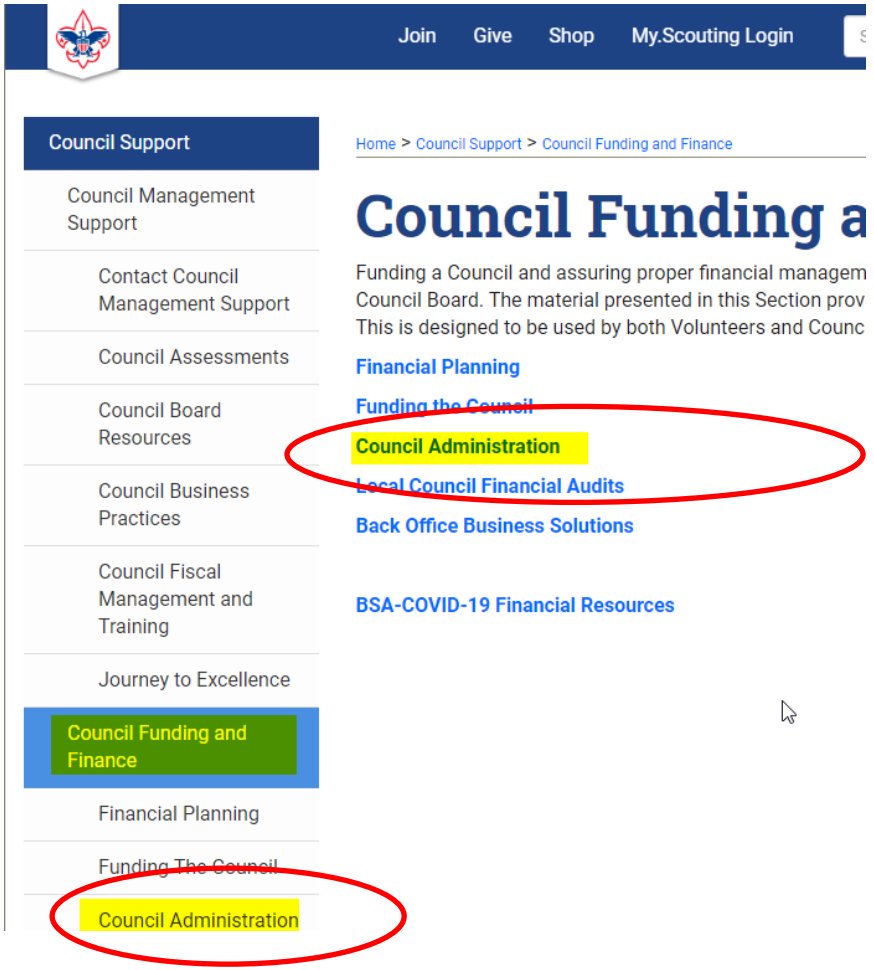


Common Myth: Inventory is once a year

- 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



QUESTIONS!

Next Meeting

Thursday, October 15

10:00 am CST