

SellWise User Group

Tuesday, October 27th, 2020

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



User Group Topics

- Inventory Checker Time
- Password Reset Utility
- Most common CAP Service calls
- Updates



Inventory Checker Preparation

- Decide to count by section, department, etc.
- Paper or data collector?
- How many staff/counters?
- How long do you need to close the store?
- Check storage for extra inventory
- Do you need to move any slow sellers?
- Old/obsolete items?
- Have one staffer organize shelves/check labels



Inventory Checker

- If you are not performing monthly/quarterly inventory counts, it's time to prepare for EOY
- Please order any rental units now. We rent them weekly
- Prepare to close and count your physical store
- Inventory checker manuals/videos are here:

<http://www.capretail.com/bsasupport/>

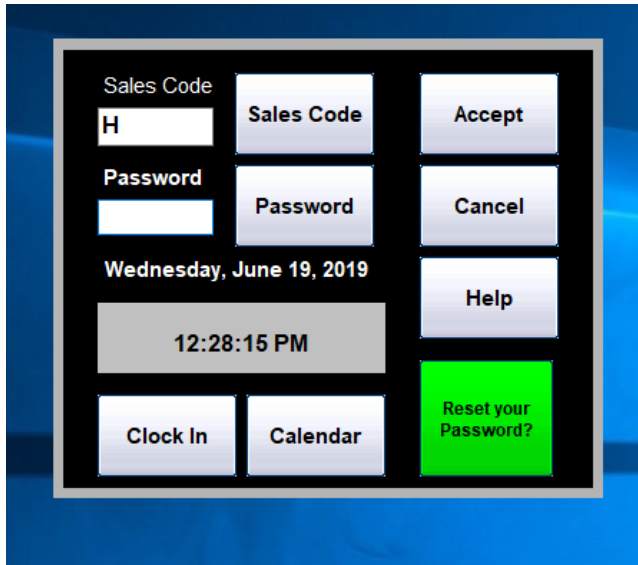


Password Reset Utility

- Included in the update when you call
- Must be turned ON in Store Settings – Have you done this?
- 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



Password Questions



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



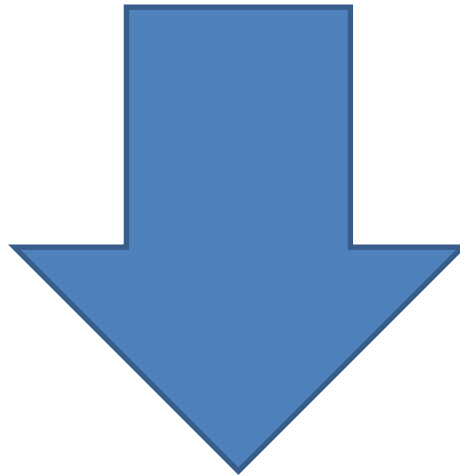
Backing up SellWise

- 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



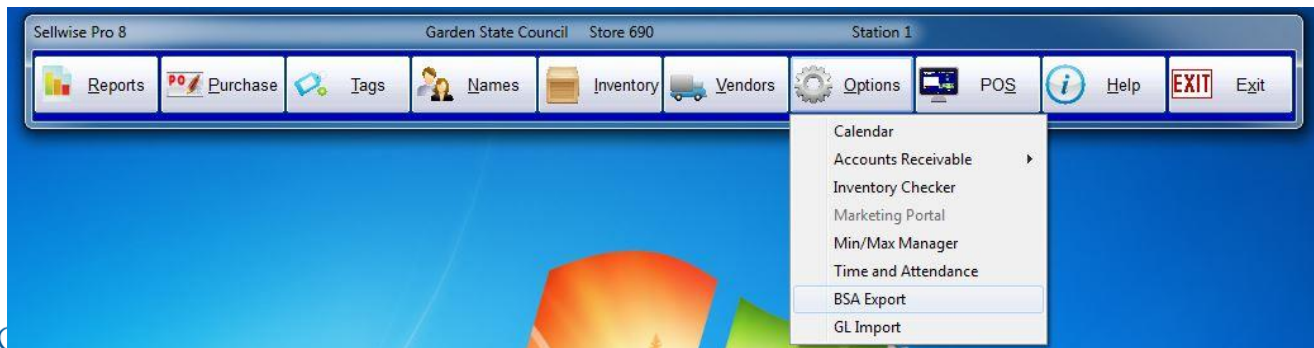
If you have questions:

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

Join Give Shop My.Scouting Login

Home > Council Support > Council Funding and Finance

Council Funding a

Funding a Council and assuring proper financial management of the Council Board. The material presented in this Section provides information that is designed to be used by both Volunteers and Council Staff.

[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, November 19

2:00 pm CST

