

SellWise User Group

Thursday, November 19th, 2020

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



User Group Topics

- Inventory Checker Time
- Windows 10 Upgrades and Pervasive
- Year End Close Reminders
- 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://capsupport.com/bsasupport/index.html>



Windows 10 and Pervasive

- Upgrading from Win 7 or moving Win 10 PCs
- If you already have Pervasive 13, you **MUST** deactivate the license on the old computer prior to installing on the new one
- A new install has a 30 day trial period
- When it expires, a DB-120 error will result, locking you out of SellWise
- CAP cannot unlock the license, you must call the vendor



Year End Close in SellWise

- EOY Preparation includes:
 - Physical inventory count
 - Full Year Reports
 - Starting and Ending Value Analysis
 - Unit Account Balance Reports
 - Review old accounts/balances for potential consolidation



Year End in SellWise

- Full Year Reports:
 - Sales Summary
 - Sales by Department
 - Sales by Item (hot sellers/slow sellers)
 - Inventory Movement/Turns
 - Compare to prior years
 - Hourly activity – review store hours
 - Customer Purchases – top customers?
 - Gift Card Balances



Common CAP Service Calls

- Pervasive DB-120 error – license expiration
- 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

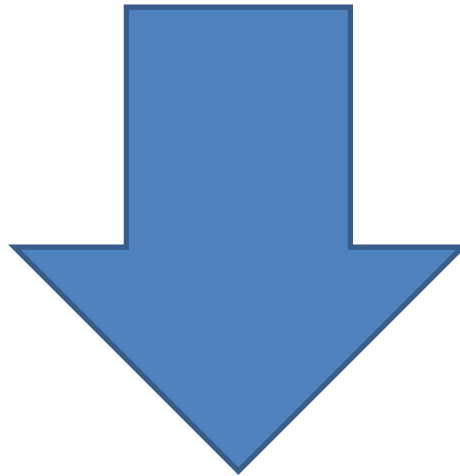
Backing up SellWise

- 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

The screenshot shows the Boy Scouts of America website's navigation menu. The 'Council Funding and Finance' link is highlighted in green. Below it, the 'Council Administration' link is highlighted in yellow and circled in red. The main content area 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 sections for 'Financial Planning', 'Funding the Council', 'Local Council Financial Audits', 'Back Office Business Solutions', and 'BSA-COVID-19 Financial Resources'. The 'Council Administration' link is also highlighted in yellow and circled in red in the main content area.



QUESTIONS!

Next Meeting

Thursday, December 17

2:00 pm CST

