

SellWise User Group

Thursday, December 16th, 2021

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



User Group Topics

- Inventory Checker Time
- 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:

<https://www.posnation.com/bsa-resources>



Live Demonstration

- Will



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
- Password reset
- Configuration questions
- How to/Training?



Updates

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



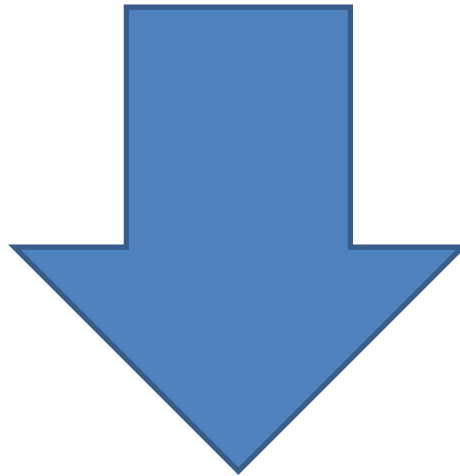
Backing up SellWise

- 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



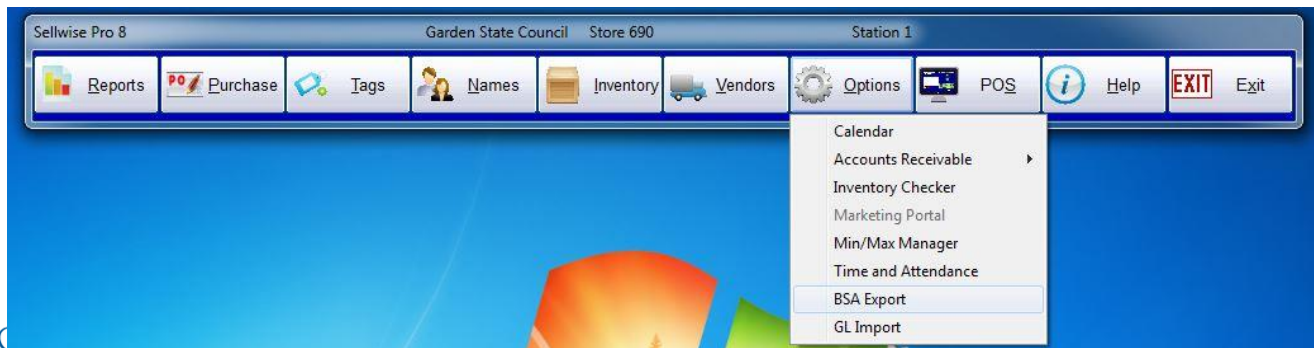
If you have questions:

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 Managers.

[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, January 20, 2022

2:00 pm CST

