SellWise User Group

Thursday, March 24th, 2022

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services

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User Group Topics

- CAP Frequent Buyer Program

- Customer Marketing Ideas

- Min/Max in Inventory

- Inventory Kit Options

- Most common CAP Service calls

- Updates

Loyalty/Frequent Buyer

- Dollars Spent = Points
  - Set an achievement goal (all or custom)
  - Set a reward
  - Applies to the NEXT transaction
  - Optional receipt messages for rewards

Frequent Buyer

Customer Name Detail

Tax Information
Tax Code: Item Tax
TaxID: ___

Payment Terms: None
Credit Limit: .00   Min Payment: ___ %
Account History

Discount: 0 %
Sell at Cost Plus: ___ %
Frequent Buyer: Yes   F4 Hide

Frequent Buyer Reward Status

Start Date	Goal	Reward	Current Bal.	Awards Pending	Total Awarded
3/23/2022	250	10	0.00	0.00	0.00

Configuration→Additional Options

FREQUENT BUYER AWARDS	
Frequent Buyer Reward (Dollar amount)	250.00
Frequent Buyer Goal	10.00
Receipt Message for Rewards Due	You have earned $## in reward points!
Screen Message for Rewards Due	Frequent Buyer Goal Attained! See Receipt for Details
Give Reward ---Reward Now given ONLY on Next Transaction	On Next Transaction

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Marketing Options

- Sort Customers/Units by:
  - Address/Zip Code
  - Total purchases
  - Items purchased
    - Send last year's Webelos purchasers Boy Scout info
    - Pull e-mail lists of units for store messaging
    - Save phone numbers for text message campaigns

    - *Third Party e-m/text messaging services required

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Min/Max in Inventory

- Set minimum and maximum stock levels for reordering

- Create suggested purchase orders

- Use Min/Max calculator for seasonal items

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Min/Max in Inventory

Min/Max in Inventory

Kits in SellWise

- Group items to sell under 1 HotKey or S/L

- Pulls all items from stock automatically

- Set a new total price or use combined prices

- Editable kits to allow changing of items in the kit at the point of sale

Kits in SellWise

Kits in SellWise

Qty	S/L	Description	Price	Total
1	9907133.	Uniform Set - Large	68.99	68.99
1	9907131.	Uniform Shirt	.00	.00
1	9907132.	Uniform Shorts	.00	.00
1	9907130.	World Crest Strip	.00	.00

3 Item(s)

H

Sub Total	**$ 68.99**
Tax	**$ 5.86**
Total	**$ 74.85**

Sales Code

Printer On

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Common CAP Service Calls

- Pervasive DB-120 error – license expiration

- Price Import

- General Ledger questions – Get the manuals before adding/changing if you're not sure

- Configuration questions – including receipts!

Updates

- CAP Backup

- How to ask Questions of the presenters

- Inventory myth
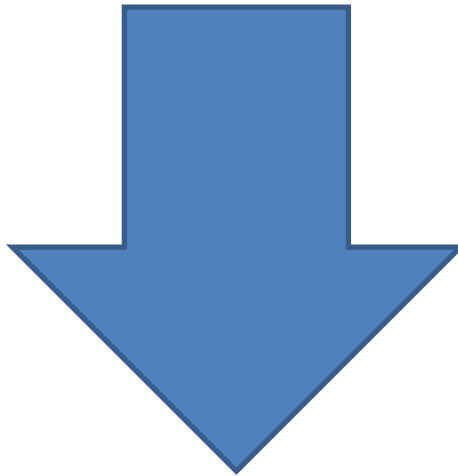
- Where this presentation is located online

Backing up SellWise

- Is your data secure?

- New (added cost) service available ($225/year)

- 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

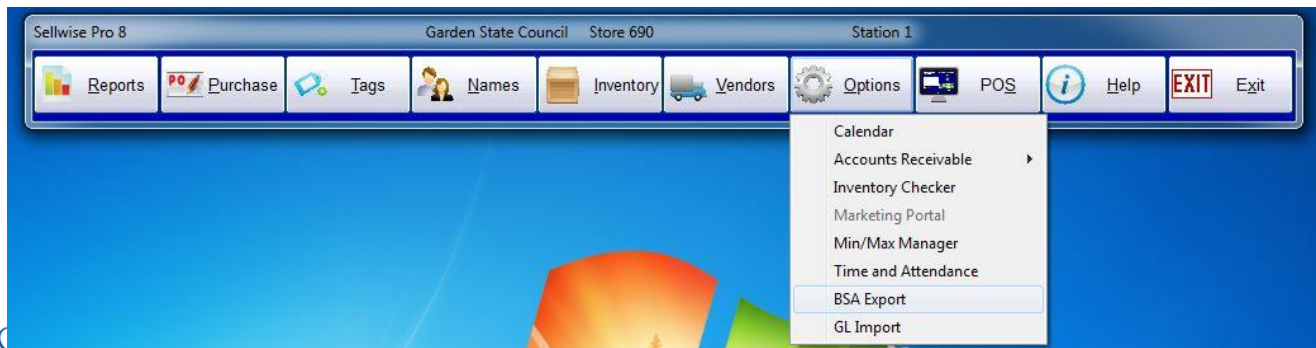- AVAILABLE NOW. Contact CAP for Pricing

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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, April 21st

10:00am CDT