

SellWise User Group

Thursday, March 24th, 2022

Presenters

Will Atkinson, President – CAP/Sellwise

Don Day, Team Lead, Shared Services



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 <input type="text" value="Item Tax"/> TaxID <input type="text"/>	Payment Terms <input type="text" value="None"/> Credit Limit <input type="text" value=".00"/> Min Payment <input type="text" value=""/> % <input type="button" value="Account History"/>	Discount <input type="text" value="0"/> % Sell at Cost Plus <input type="text" value=""/> % Frequent Buyer <input type="button" value="Yes"/> <input type="button" value="F4 Hide"/>
--	---	---

Frequent Buyer Reward Status

Start Date	<input type="text" value="3/23/2022"/>	Goal	<input type="text" value="250"/>	Reward	<input type="text" value="10"/>	Current Bal.	<input type="text" value="0.00"/>	Awards Pending	<input type="text" value="0.00"/>	Total Awarded	<input type="text" value="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



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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



Min/Max in Inventory

- Set minimum and maximum stock levels for reordering
- Create suggested purchase orders
- Use Min/Max calculator for seasonal items



Min/Max in Inventory

Vendor Purchase Order ▼ 0 Order - Total

Help	Add	Change	Delete	Receive <u>P</u> O	Receive <u>M</u> anual
	<u>S</u> uggested Order	Understock	Matrix <u>O</u> rdering	<u>T</u> ransfers	On <u>O</u> rd ^r Report



Min/Max in Inventory

Create Orders for Selected Understocked Vendors

Order	Code	Vendor Name	Estimate Total
X	90	National Supply Co	\$1,956.00

Find a Vendor Name

Help F3 Select F4 Select All Accept Cancel



BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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

Inventory - 48,598 Records

Stock Locator 9907133. **Description** Uniform Set - Large 48942
Vendor Item # Uniform - Large **Sub-Description** Shirt, shorts, WC
Unit of Measure **Non-Decrementing Item** **UPC(s)**

Main **Additional Information** **Messages**

Pricing Options
 Price Levels
 Promo Prices
 Quantity Prices

Kit Item
☒ Kit ☐ Kit Plus
 View Kit

Matrix
☐ Matrix Root ☐ Matrix Item
 View Matrix

Serialized Item
 Serialized View Serialized
 View Warranty

Kit Contents
 9907133. - Uniform Set - Large

S/L	Description	Qty	Unit Cost	Total Cost	Total Price
9907130.	World Crest Strip	1	.50	.50	1.50
9907131.	Uniform Shirt	1	20.00	20.00	39.00
9907132.	Uniform Shorts	1	18.00	18.00	34.99
Totals			38.50	75.49	

Messages
 Mix 'n Match Code View
 Break Pack Link to SL
 Item Link to SL

Notes

Help **Add** **Change** **Delete** **History** **Print Tag** **Accept** **Cancel**

F1 Help **Add** **Change** **Delete** **F10 Accept** **Esc Cancel**

Edit
Find
Next

Windows taskbar: 62°F Partly sunny 5:15 PM 3/23/2022





BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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



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



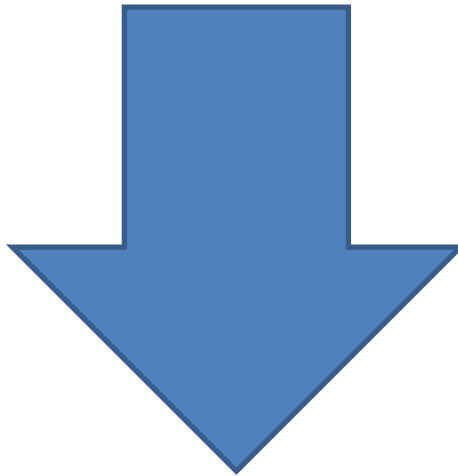
Backing up SellWise

- 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



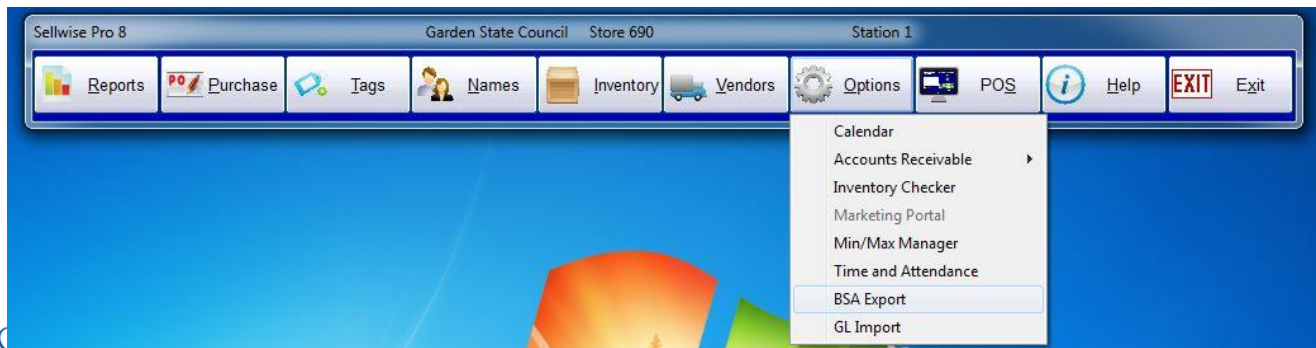
If you have questions:

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 BSA website's Council Support section. The top navigation bar includes links for Join, Give, Shop, and My.Scouting Login. The main content area is titled 'Council Funding and Finance' and includes a breadcrumb trail: Home > Council Support > Council Funding and Finance. The left sidebar lists various support topics, with 'Council Funding and Finance' highlighted in green. The right sidebar lists specific resources, with 'Council Administration' highlighted in yellow and circled in red. Other resources include Financial Planning, Funding the Council, Local Council Financial Audits, Back Office Business Solutions, and 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

Home > Council Support > Council Funding and Finance

Council Funding a

Funding a Council and assuring proper financial managem Council Board. The material presented in this Section prov This is designed to be used by both Volunteers and Council

[Financial Planning](#)

[Funding the Council](#)

Council Administration

[Local Council Financial Audits](#)

[Back Office Business Solutions](#)

[BSA-COVID-19 Financial Resources](#)



QUESTIONS!

Next Meeting

Thursday, April 21st

10:00am CDT

