

# SellWise User Group

Thursday, April 28th, 2022

## Presenters

Will Atkinson, President – CAP/Sellwise  
Don Day, Team Lead, Shared Services



# User Group Topics

- E-mailing Daily Reports
- Purchase Orders and Uploading Orders
- Cost/Price Update Process
- Most common CAP Service calls
- Updates



# Automatically E-mail Daily Reports

- Set a time of day to get EOD reports sent to you automatically
  - E-mail must be configured in CAP
  - Pick the reports you want to see from “Daily Reports”
  - Pick a Time (using Windows Task Scheduler)
  - Get your reports by e-mail!
  - Visit [help.posnation.com](http://help.posnation.com), search “E-mail daily” for the instructions, or give us a call!



# Automatically E-mail Daily Reports

- CAP Configuration
- “Phone/Shipping/Miscellaneous”
- Put in your e-m address here, save
- See guide online for Task Scheduler Setup Tips

Bandy STOREID	
Set Department(s) for Bandy Works Export	
<b>Other</b>	
Stock Locator used for Line Remarks	20998
Membership Department Code	087.000.000
Rental Department Code	076.000.000
Discount Percentage Department Code	088.000.000
Dollar Discount Department Code	
Shopping Cart Download Format File	None
SL used for Shopping Cart Discounts	
Email Daily reports to	
Show Change in Tendered Currency	No
Exchange Rate Displayed (Khanico)	



# Purchase Orders and Uploading POs

- SellWise includes a full PO module with the option to create POs:
  - Manually based on perceived need
  - Using min/max (see March slides)
  - Suggested Order (based on QOH and Sales for a date range)



# Purchase Orders and Uploading POs

- **Manual**: add items based on need or for smaller and/or special orders
- **Understock**: Uses Min/Max to build suggested POs for one or all vendors
- **Suggested Order**: Uses QOH and Sales in a date range to build a suggested PO for a specific vendor



# Purchase Orders and Uploading POs

10/08/2021 10/08/2021 10/08/2021 00001166 ED WINNER

Store 1(Hub) CAP Software 30 Orders - Tot

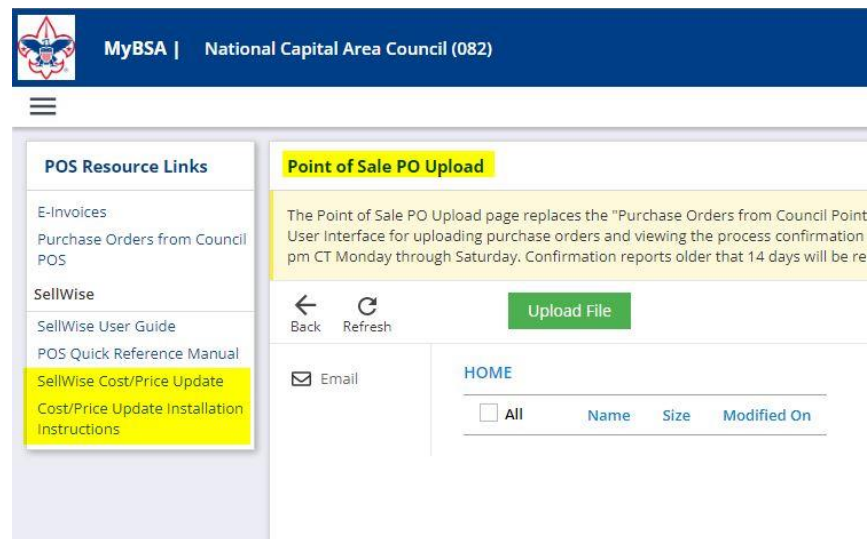
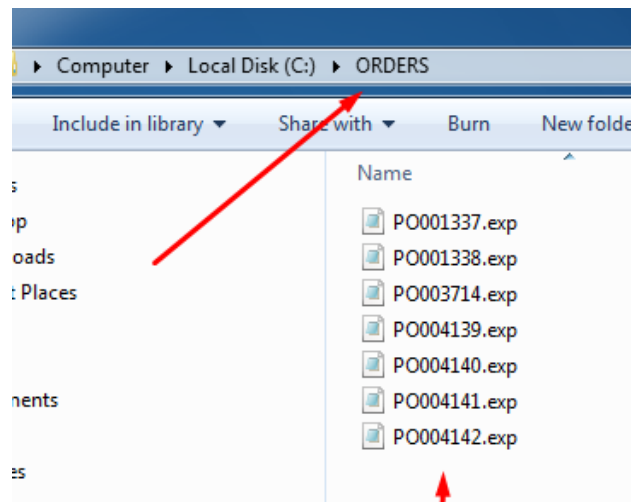
↓

Add	Change	Delete	Receive PO	Receive Manual
Suggested Order	Understock	Matrix Ordering	Transfers	On Order Report



# Purchase Orders and Uploading POs

- Create, save, modify POs as you go
- Once completed and saved, the PO can be uploaded directly to Supply
- C:\Orders





# Cost/Price Import Tips

- Files are found via MyBSA

The screenshot shows the MyBSA website interface. At the top, there is a navigation bar with the BSA logo and the text "Home Page". Below this, there is a menu with items: Home, Membership, Program, Funding, Point of Sale, and ScoutNET. The "Point of Sale" item is circled in red. Below the menu, there is a "Support" section with links like "ACH Report for STEM Bulk Upload" and "Change My Password". There is also an "Engagement Tools and Resources" section and a "Fundraising" section. On the right side, there is a "National Council News Update" section with a red arrow pointing to it from the "Point of Sale" menu. The news update section contains a list of links for the latest official BSA news, including "www.BSArestructuring.org", "Workplace", "Scouting Wire", "Scouting Newsroom", and "Bryan on Scouting".



# Cost/Price Import Tips

- Download available files and view instructions here:
- Download to C:\SW\Maintenance

MyBSA | National Capital Area Council (082)

POS Resource Links

- E-Invoices
- Purchase Orders from Council POS

SellWise

- SellWise User Guide
- POS Quick Reference Manual
- SellWise Cost/Price Update**
- Cost/Price Update Installation Instructions

**Point of Sale PO Upload**

The Point of Sale PO Upload page replaces the "Purchase Orders from Council Point of Sale User Interface for uploading purchase orders and viewing the process confirmation reports older than 14 days will be removed from the system on Monday through Saturday. Confirmation reports older than 14 days will be removed from the system on Monday through Saturday.

Back Refresh Upload File

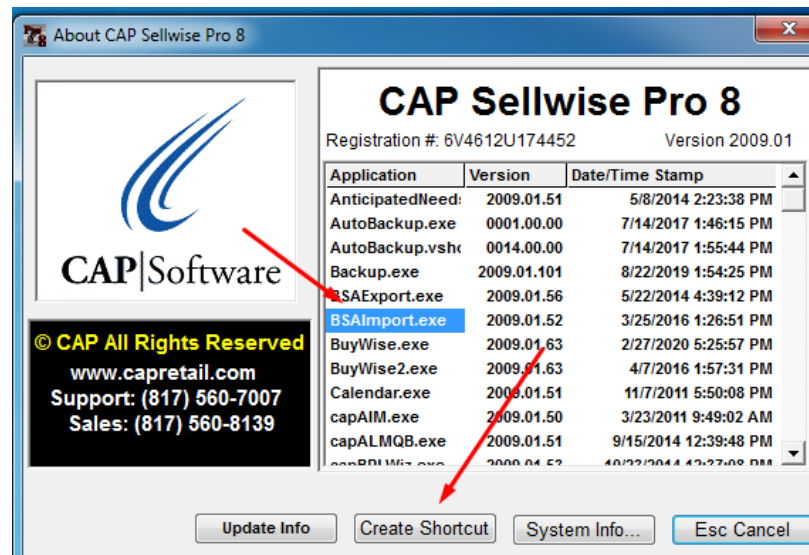
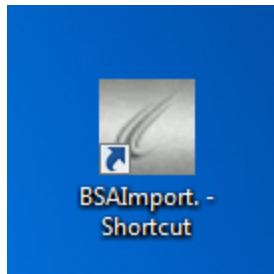
HOME

<input type="checkbox"/> All	Name	Size	Modified On
------------------------------	------	------	-------------



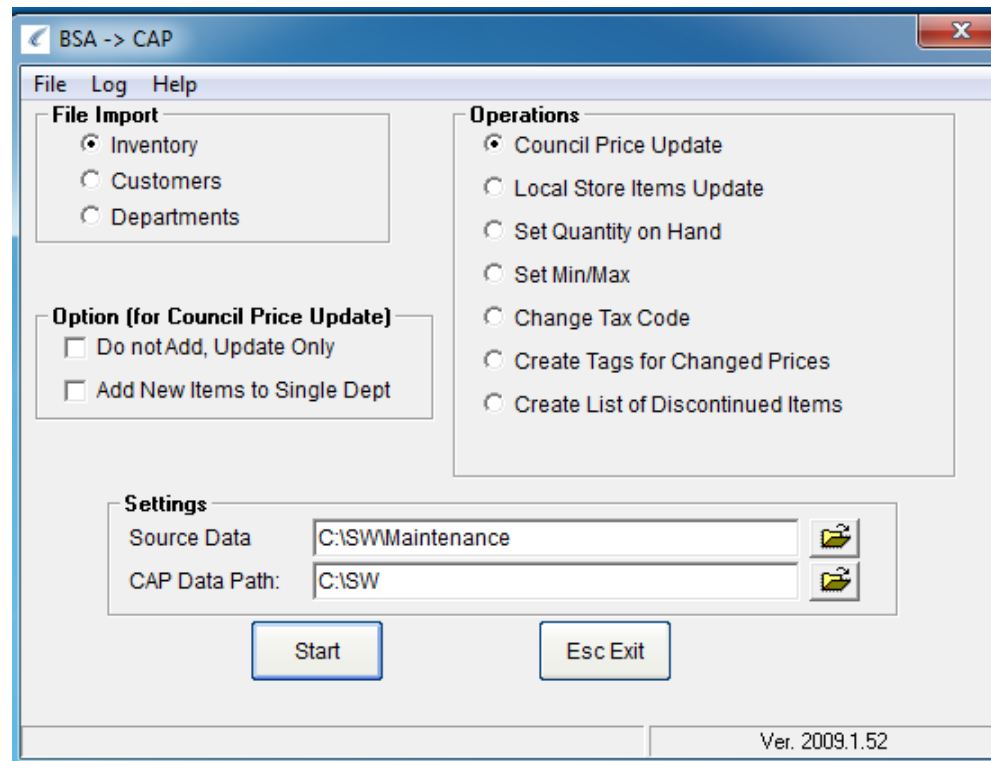
# Cost/Price Import Tips

- Make sure you have a shortcut on your desktop for the BSAImport.exe



# Cost/Price Import Tips

- Run the program and select the new file:



# Common CAP Service Calls

- Price Import – how to, confirmation of process, user guide available online
- 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



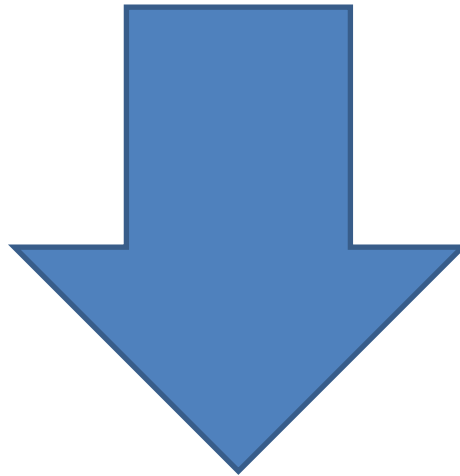
# Backing up SellWise

- Is your data secure?
- New (added cost) service available (\$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:

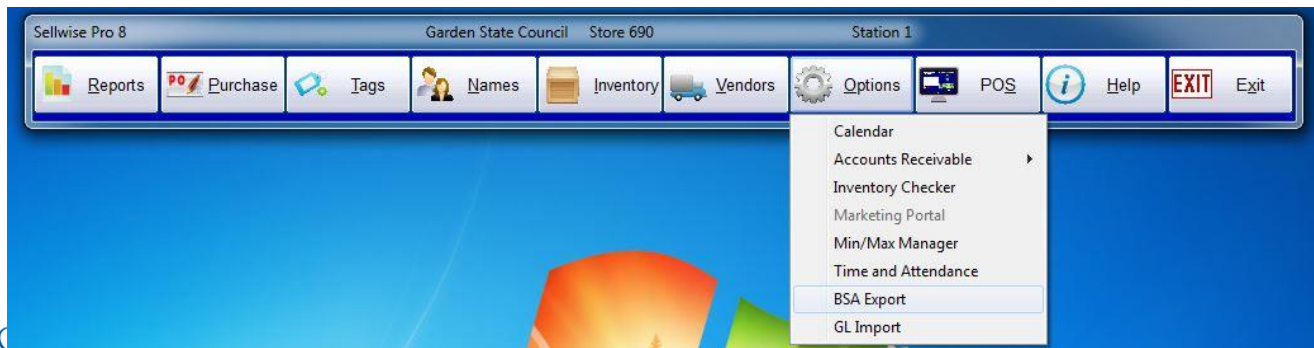
1. Look for horizontal bars at bottom of your screen
2. Click on “chat”
3. Type in your question and hit enter to send to all participants





# 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](https://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, May 19th

### 10:00am CST

