SellWise User Group

Thursday, June 23, 2022

Presenters

Will Atkinson, VP Customer Success, POS Nation

Don Day, Team Lead, Council Business Solutions

User Group Topics

- Uploading Purchase Orders to Supply

- Suggested Order Functionality

- Creating Cash Receipt Items with GL#

- Most common CAP Service calls

- Updates

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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
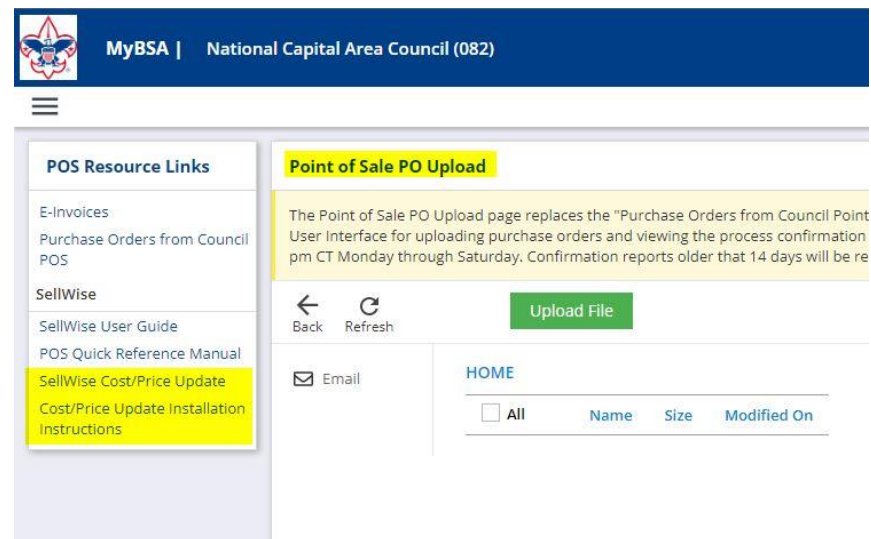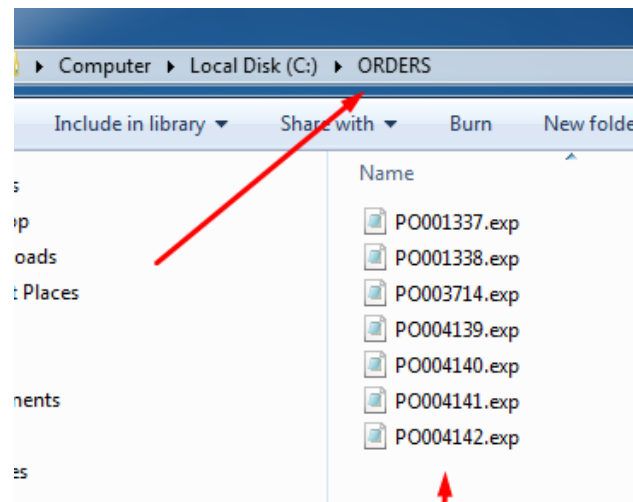
Purchase Orders and Uploading POs

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

Suggested Order PO Option

- Allows the user to create purchase orders based on actual sales activity during a date range, not static min/max values

- Done for a specific vendor

- Select a PRIOR date range, typically 4-6 weeks

- Review/Edit Items and Quantities and save as a PO

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Suggested Order PO Option

Suggested Order PO Option

Boy Scout Council - 90	90					
BSA	BSA					
Carton	MARLGTN				HAGERSTOWN	MD	21740

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Suggested Order PO Option

Suggested Order PO Option

Suggested Order from 5/15/2022 to 6/15/2022 Vendor:

SL	Item ID	Item Description		Quantity On Hand	Quantity On Order	Current Sales	Difference	Unit Cost	Qty to Order	Total Cost
21083.	102034	World Crest		-25	0	25	25	1.00	25	25.00
21085.	128712	Uniform Shirt	Large	-19	0	19	19	29.00	19	551.00
21084.	919182	Boy Scout Handbook		-33	0	33	33	12.00	33	396.00

When Creating a PO ✕

The Quantity to Order column can be edited

OK

◄ ► \ Suggested Order /

Print   Save   Create Purchase Order   Exit
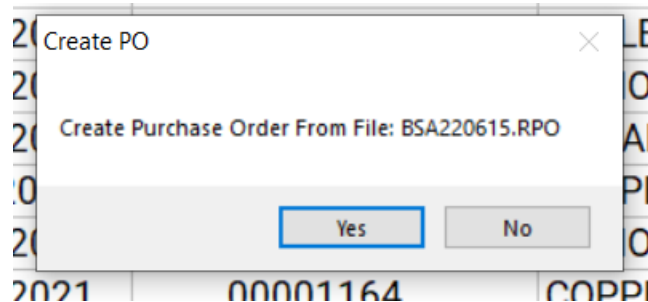
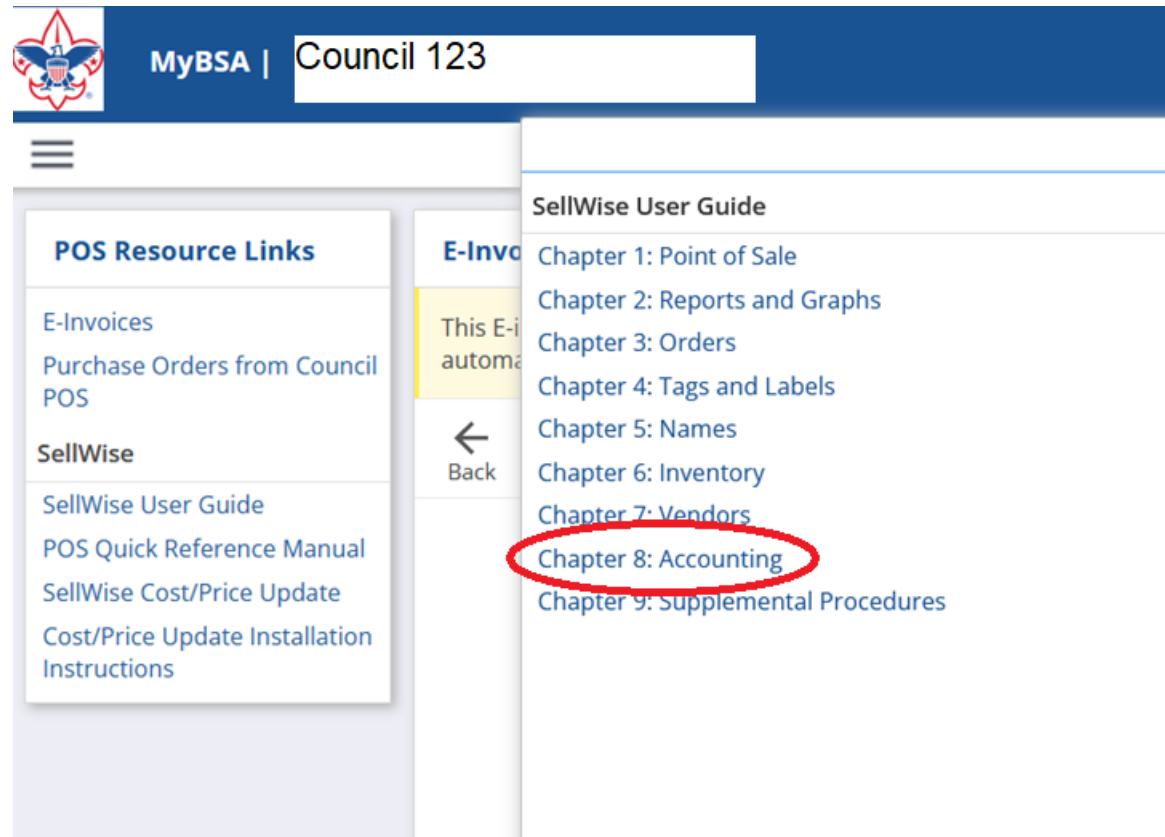# Suggested Order PO Option

Cash Receipt Items with GL

- Cash Receipt or other custom items flow automatically to the GL

- MUST be setup correctly for the GL Export to run and be accepted

- Setup with correct GL Account Number

- Can be "set price" or "open price"

- Fees, registrations, etc.

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Cash Receipt Items with GL

- Detailed Accounting Setup Guide Online

Cash Receipt Items with GL

Step	Action
1	Click the **SellWise** icon on your desktop. At the SellWise menu, click **Inventory**.
2	From the Inventory list, click **View Details**.
3	At the Inventory Detail screen, click **Add**.
4	At the Add screen, fill out the fields as follows: **Item ID**: Enter a logical abbreviation. **Description:** A short description. This will appear on the receipt and reports and is also useful for looking up an item. **Sub-Description:** The GL account number without dashes or spaces. For example, 1680102320. **Department:** 090 **Vendor:** 90 **Tax Code:** Select non-taxable for non-taxable items, or select the appropriate tax code for taxable items. **List Price:** List price is .00 for items that do not have a fixed price. Enter the fee for items with a fixed price. **Non-decrementing:** Set this to **Yes** **Discounts Allowed:** Set this to **Yes**
5	When you have entered all information, click **F10 Accept**.

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

Cash Receipt Items with GL

Cash Receipt Items with GL

Common CAP Service Calls

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

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

- Configuration questions

Updates

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

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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

BOY SCOUTS OF AMERICA®

Prepared. For Life.®

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
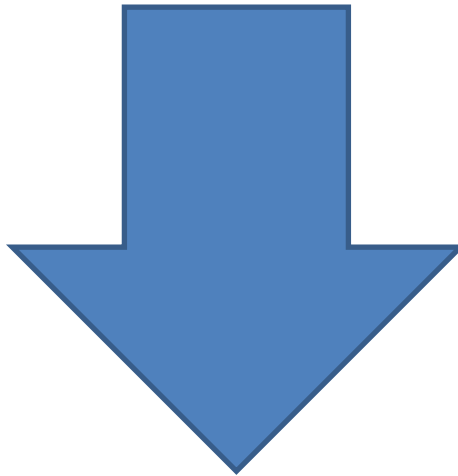
Common Myth: Inventory is once a year

- 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
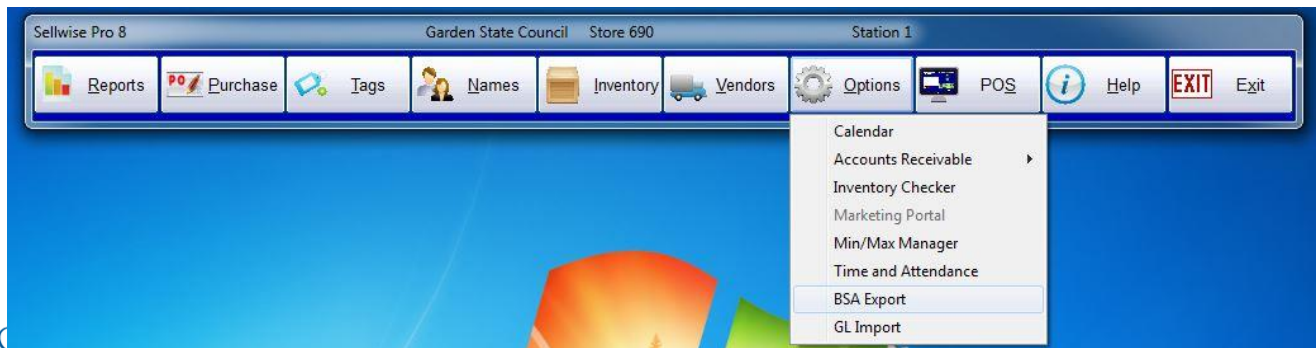
Slides and recording posted on **scouting.org/financeimpact** Look on the *Council Administration* link, then look at the bottom for Sellwise Support/User Group link

QUESTIONS!

Next Meeting

Thursday, July 21st

10:00am CST

BOY SCOUTS OF AMERICA®

Prepared. For Life.®