

SellWise User Group

Thursday, June 23, 2022

Presenters

Will Atkinson, VP Customer Success, POS Nation
Don Day, Team Lead, Council Business Solutions



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User Group Topics

- Uploading Purchase Orders to Supply
- Suggested Order Functionality
- Creating Cash Receipt Items with GL#
- Most common CAP Service calls
- Updates



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



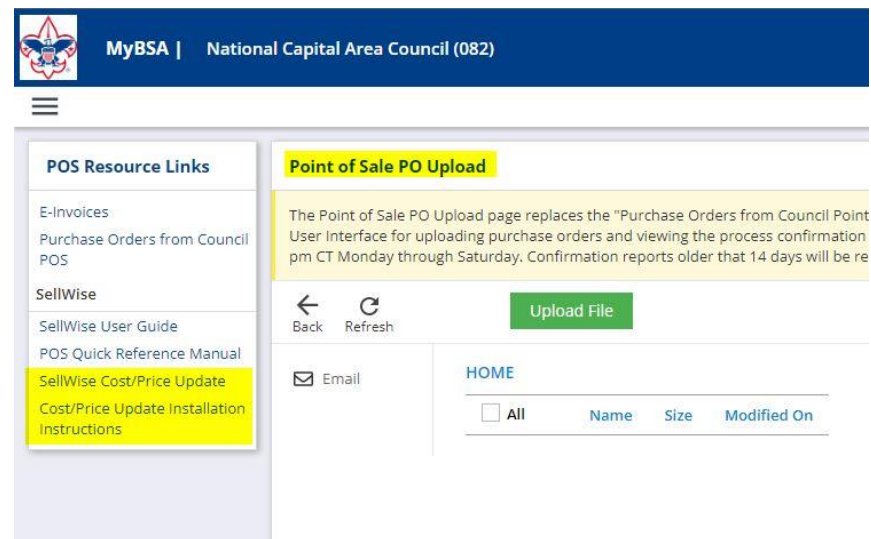
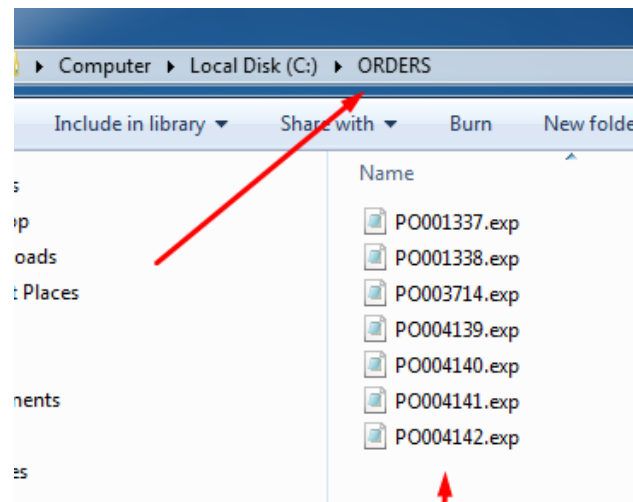
Purchase Orders and Uploading POs

10/08/2021	10/08/2021	10/08/2021	00001166	ED WINNER
			30 Orders - Tot	
			Store 1(Hub) CAP Software	
				
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



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



Suggested Order PO Option

NO		04/09/2021	04/09/2021	04/09/2021	00001162	NATIC
No	H	10/08/2021	10/08/2021	10/08/2021	00001164	COPPI
No	H	10/08/2021	10/08/2021	10/08/2021	00001165	DIXIE
No	H	10/08/2021	10/08/2021	10/08/2021	00001166	ED W

Vendor Purchase Order

Store 1(Hub) CAP Software

Help

Add

Suggested Order

Change

Understock

Delete

Matrix Ordering

R

]



Suggested Order PO Option

Boy Scout Council - 90	90								
BSA	BSA								
Center	MADISON						HAGERSTOWN	MD	21740



Suggested Order PO Option

P Suggested Order

Select Sales History Range

Starting Date: 9 / 1 / 2021

Ending Date: 9 / 30 / 2021

☐ Do not include items with currently understocked set to "No"

☐ Include items with No Sales and No Quantity on Hand

☐ Include Min and Max numbers(for information only)

Sort report by:

☒ Item ID ☐ Description ☐ SL

Accept Cancel



Suggested Order PO Option

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

SL	Item ID	Item Description		Quantity		Current Sales	Difference	Unit Cost	Qty to Order	Total Cost
				On Hand	On Order					
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

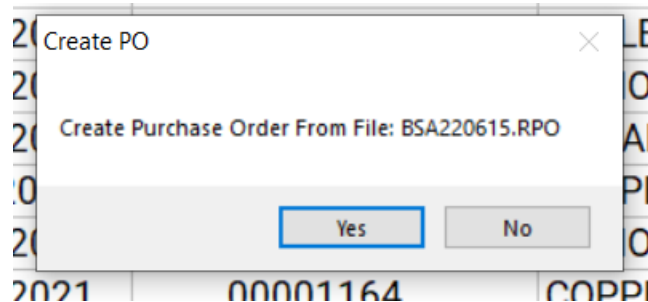
Exit



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Suggested Order PO Option



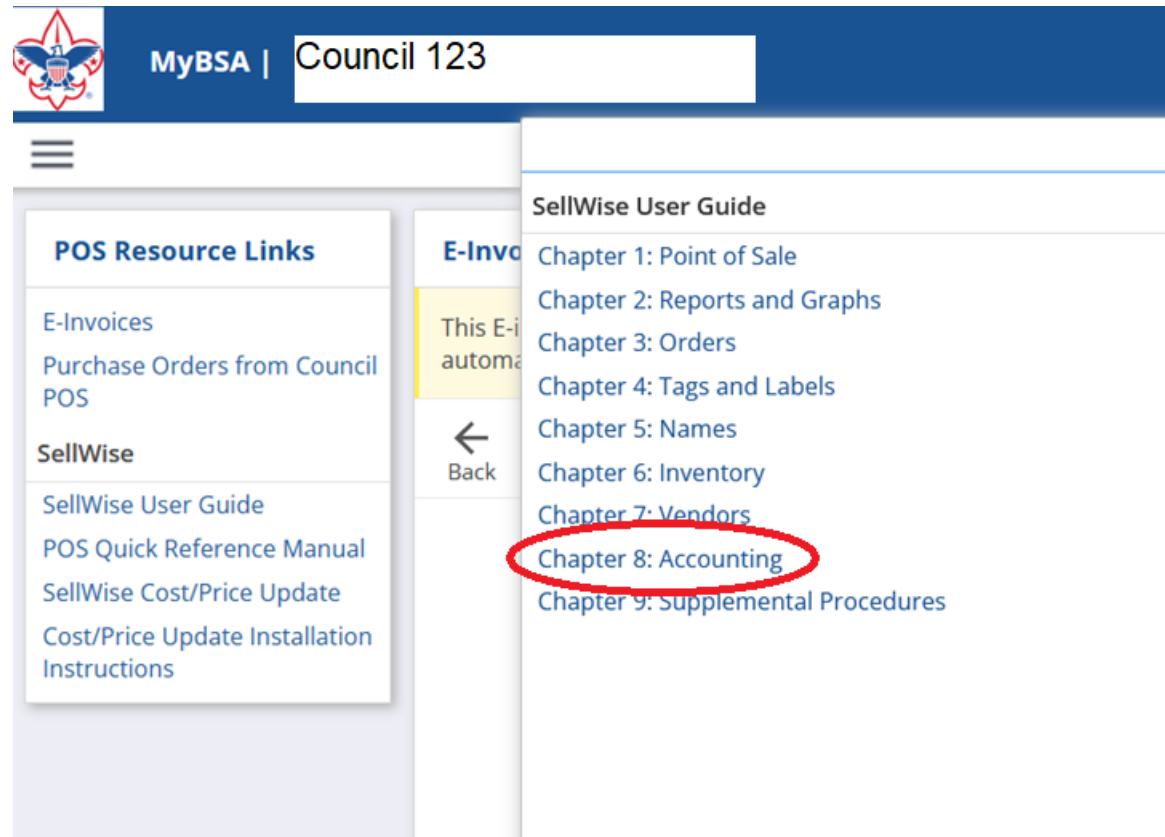
Cash Receipt Items with GL

- 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.



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 .



Cash Receipt Items with GL

Inventory - 3,597 Records - Store #1

Stock Locator	21082.	Description	Summer Camp Registration	3609
Vendor Item #	SumCamp2022	Sub-Description	1880500000	
Unit of Measure	L - Liter	UPC(s)		
Store 1				

Main		Additional Information		Messages	
Cost/Price		Tax Code Non Taxable		Volumetric Tax \$	
Current Cost	0.00	Margin	100.00 %		
Actual Cost	0.00	Markup	%		
List Price	75.00				
Ordering Information		Alt. Vendor		Dept Code Dept --Sub Dept-- Class	
On Hand	0	Maximum	1	090.000.000 Cash Receipt Items	
On Order	0	Minimum	0		
Qty / Pack	1	Has Sold	No		
Currently Understocked	No	Last Sold			
Do not Reorder		False			

Notes

Edit
Find
Next

Help Add Change Delete History Print Tag Accept Cancel Esc



Cash Receipt Items with GL

Inventory - 3,597 Records - Store #1

Stock Locator 21082. Description Summer Camp Registration 3609
Vendor Item # SumCamp2022 Sub-Description 1880500000
Unit of Measure Non-Decrementing Item L - Liter Store 1

Main	Additional Information	Messages																												
Pricing Options <input type="button" value="Price Levels"/> <input type="button" value="Promo Prices"/> <input type="button" value="Quantity Prices"/> Kit Item <input type="checkbox"/> Kit <input type="checkbox"/> Kit Plus <input type="button" value="Add Kit"/> Matrix <input type="checkbox"/> Matrix Root <input type="checkbox"/> Matrix Item <input type="button" value="Add Matrix"/> Serialized Item Serialized <input type="checkbox"/> No <input type="button" value="View Serialized"/> <input type="button" value="View Warranty"/>	<table><tr><td>EBT Eligible</td><td>No</td></tr><tr><td>Sell by Weight</td><td>No</td></tr><tr><td>Use Tare Weight</td><td>No</td></tr><tr><td>Sell by Dollar Amount</td><td>No</td></tr><tr><td>Discounts Allowed</td><td>Yes</td></tr><tr><td>Web Enabled</td><td>No</td></tr><tr><td>Non Decrementing</td><td>Yes</td></tr><tr><td>Commissionable</td><td>No</td></tr></table> <p>Verify Age <input type="text"/> years</p>	EBT Eligible	No	Sell by Weight	No	Use Tare Weight	No	Sell by Dollar Amount	No	Discounts Allowed	Yes	Web Enabled	No	Non Decrementing	Yes	Commissionable	No	<table><tr><td>Mix 'n Match Code</td><td><input type="text"/></td><td><input type="button" value="View"/></td></tr><tr><td>Break Pack Link to SL</td><td><input type="text"/></td><td></td></tr><tr><td>Item Link to SL</td><td><input type="text"/></td><td></td></tr><tr><td>Stock Link to SL</td><td><input type="text"/></td><td></td></tr></table> <p><input type="button" value="Add Picture"/> <input type="button" value="Remove Picture"/></p>	Mix 'n Match Code	<input type="text"/>	<input type="button" value="View"/>	Break Pack Link to SL	<input type="text"/>		Item Link to SL	<input type="text"/>		Stock Link to SL	<input type="text"/>	
EBT Eligible	No																													
Sell by Weight	No																													
Use Tare Weight	No																													
Sell by Dollar Amount	No																													
Discounts Allowed	Yes																													
Web Enabled	No																													
Non Decrementing	Yes																													
Commissionable	No																													
Mix 'n Match Code	<input type="text"/>	<input type="button" value="View"/>																												
Break Pack Link to SL	<input type="text"/>																													
Item Link to SL	<input type="text"/>																													
Stock Link to SL	<input type="text"/>																													

Notes



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



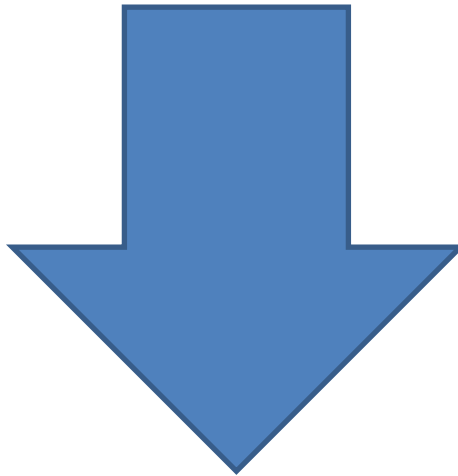
Backing up SellWise

- 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



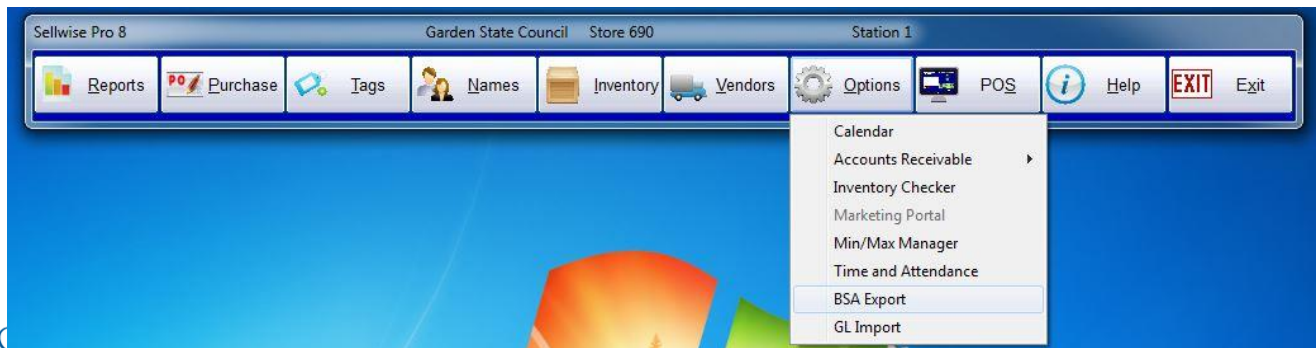
If you have questions:

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



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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 Boy Scouts of America website. At the top, there is a navigation bar with links for 'Join', 'Give', 'Shop', and 'My.Scouting Login'. Below this, the 'Council Support' section is visible. On the left, a sidebar lists various support topics, with 'Council Funding and Finance' highlighted in green. On the right, the 'Council Funding and Finance' page is displayed, featuring a list of links: 'Financial Planning', 'Funding the Council', 'Council Administration' (highlighted in yellow and circled in red), 'Local Council Financial Audits', 'Back Office Business Solutions', and 'BSA-COVID-19 Financial Resources'. The 'Council Administration' link is also circled in red in the sidebar.



QUESTIONS!

Next Meeting

Thursday, July 21st

10:00am CST

