

# SellWise User Group

Thursday, September 29th, 2022

## **Presenters**

Will Atkinson, VP Customer Experience, POS Nation  
Don Day, Team Lead, Shared Services



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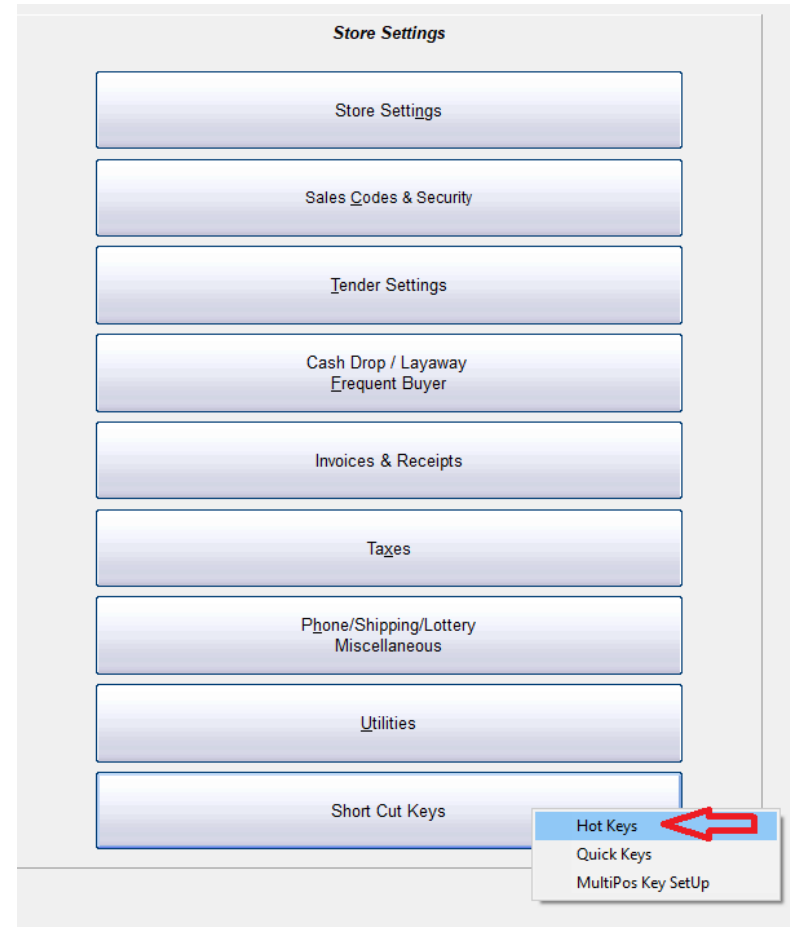
# User Group Topics

- Hot Keys
- Suggested Order Functionality
- Windows 11
- Pinpads: P400 vs VX805
- Most common CAP Service calls
- Updates



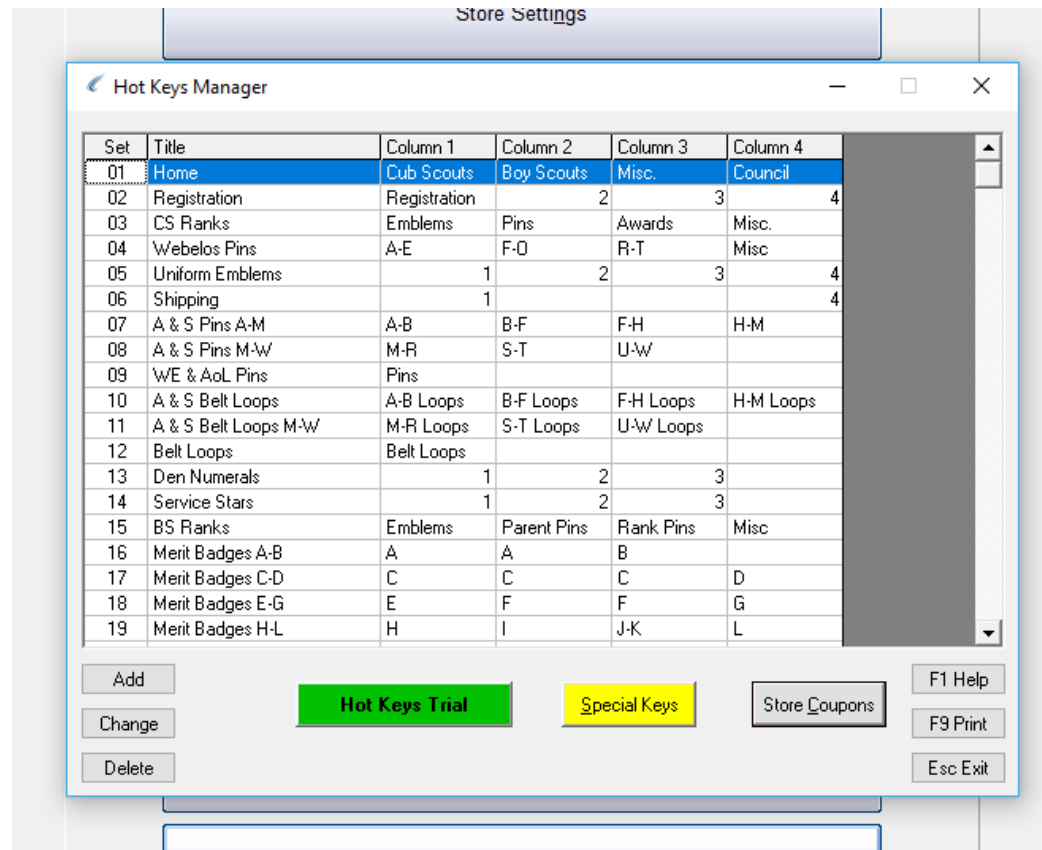
# Setting Up HotKeys

- SellWise Toolbar
- Click Help -> Configuration
- Click 'Shortcut Keys'
- Select 'Hotkeys'
- Edit Broken Links
- Add new Cash Receipts



# HotKey Setup

- Link to Specific Items, or to Other sets



# HotKey for an Item

Hot Keys Set: - HKSET01.SDF

Cancel Help

Hot Keys Set Title Home

Click on the button or label(above column) to change it.

Cub Scouts Boy Scouts Misc. Council

CS Ranks	BS Ranks	Uniform Emblems	Registration
	Merit Badges	Knots	Camps
	Patrol Emblems	Interpreter Str	OA
	Youth Positions	FOS	Custodial 2017
	Adult Positions	Historic Trails	Handl. \$0-\$25
	TAC Segments	Jamboree Patch	Handl. \$26-\$100
Cap/Neck/Slide	Normandy	Misc. Pins	Handling >\$100
Scrapbook Paper	Scrapbook Stick	TAC Items	Shipping

Cub Scouts Button #3

Link Item to key by:

☒ Stock Locator ☐ Item ID

Key Label Scrapbook Paper

Stock Locator 9603796

Picture (icon)

Link To Hot Keys Set

F3 Find Item

F4 Find Set

Clear Key Esc Cancel



# Link to Another Set

Hot Keys Set: - HKSET01.SDF

Accept Cancel Help

Hot Keys Set Title Home

Click on the button or label(above column) to change it.

Cub Scouts Boy Scouts Misc. Council

CS Ranks	BS Ranks	Uniform Emblems	Registration
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Scrapbook Paper	Scrapbook Stick	TAC Items	Shipping

Cub Scouts Button #1

Link Item to key by:  
☒ Stock Locator ☐ Item ID F3 Find Item

Key Label CS Ranks

Stock Locator

Picture (icon)

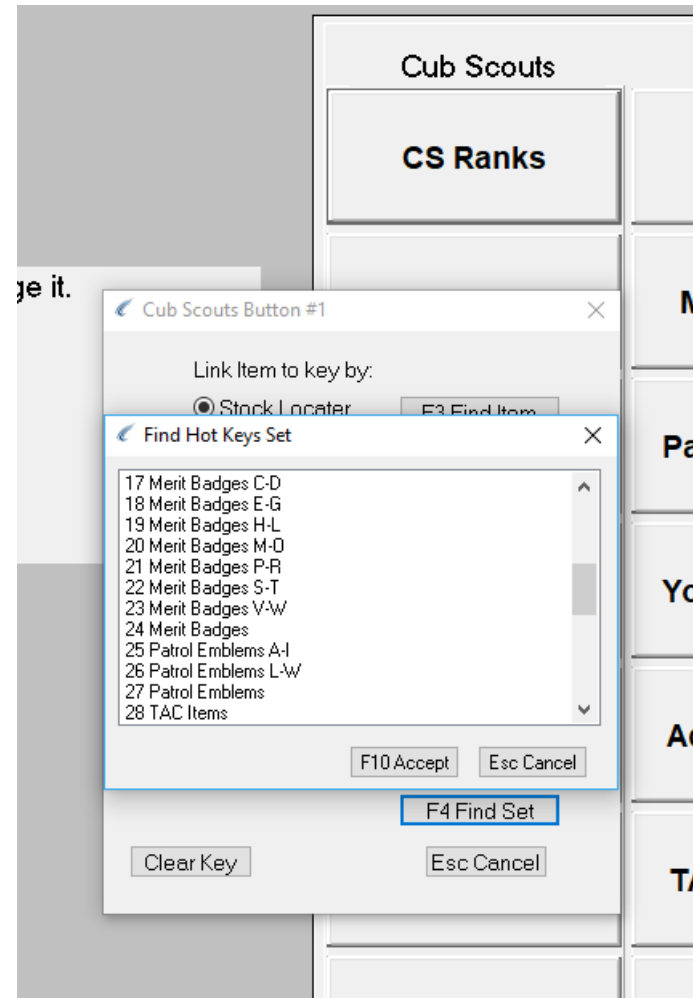
Link To Hot Keys Set 03 CS Ranks F4 Find Set

Clear Key Esc Cancel



# Search for Available Sets

- Press F4 or Click Find Set
- Select the set you need
- Press F10/Accept



# HotKeys Reminders

- Start at the MAIN set and decide how to map your items
- Build a list of items by logical grouping
- Create additional sets of the items by these groups
- Then link the buttons on the MAIN set to the drill down sets
- You can change/edit at any time



# 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



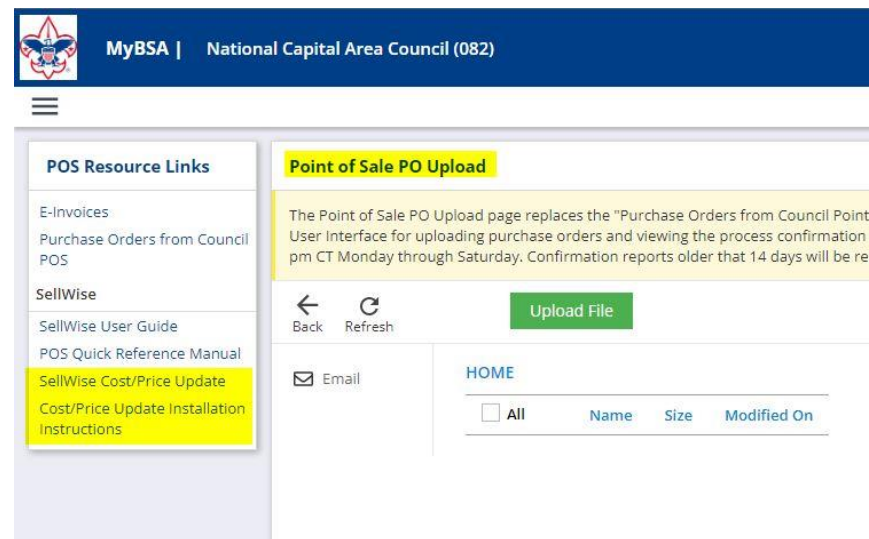
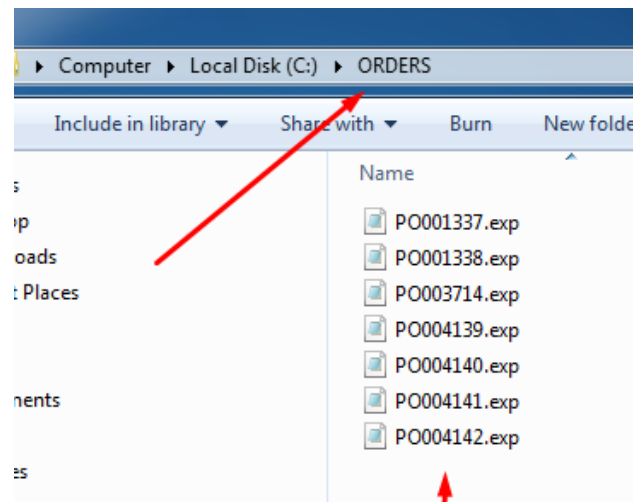
# Purchase Orders and Uploading POs

10/08/2021	10/08/2021	10/08/2021	00001166	ED WINNER
		Store 1(Hub) CAP Software		30 Orders - Tot
				
Add	Change	 Delete	Receive <u>P</u> O	Receive <u>M</u> anual
<u>S</u> uggested Order	<u>U</u> nderstock	Matr <u>i</u> x Ordering	<u>T</u> ransfers	On <u>O</u> rder 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							
Order	MADISON					ELICESTOWN	MD	21740



# Suggested Order PO Option

**P** Suggested Order ×

Select Sales History Range

Starting Date	Ending Date
9 / 1 /2021 ▾	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

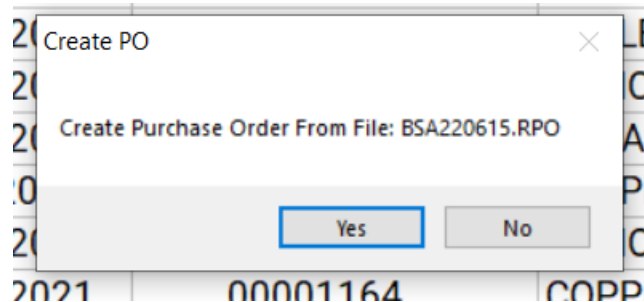
Exit



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# Suggested Order PO Option



# Windows 11 is Supported

- SellWise runs on Windows 11 Professional
- SellWise does NOT run on Windows 11 Home
- If you are on an older version of Pervasive, you will need to upgrade your Pervasive. Windows 11 requires Pervasive SQL V13 or V14. (Windows 10 has the same requirements)



# Pinpad Details

- The Verifone VX805 is no longer available for purchase
- The “end of service” date was 4/30/21 for repairs and updates
- Full end of support is scheduled for April 30, 2023.
- The Verifone P400 is the direct replacement, and it also supports contactless payments
- Cost is \$350



# Common CAP Service Calls

- General Ledger questions – Get the manuals before adding/changing if you're not sure
- Printer Setup Changes
- New hardware/moving hardware. Support will help with drivers and configuration
- Configuration questions



# Updates

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



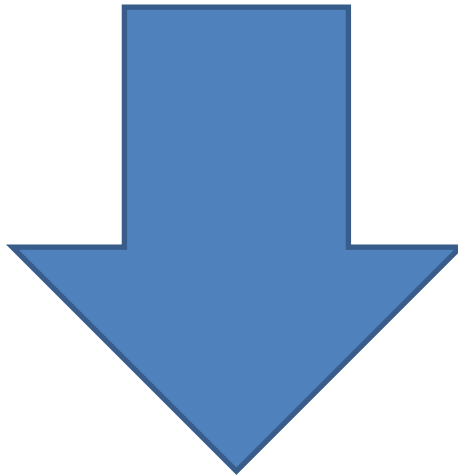
# Backing up SellWise

- 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:**

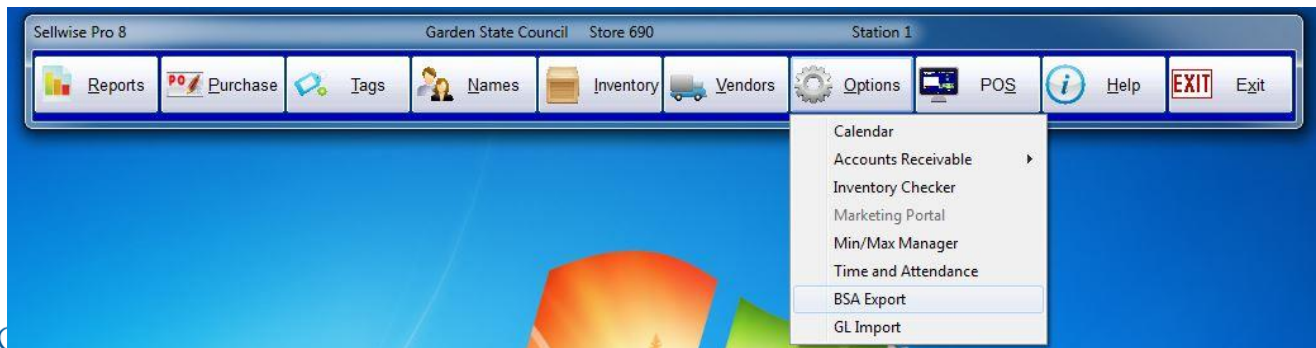
1. Look for horizontal bars at bottom of your screen
2. Click on “chat”
3. Type in your question and hit enter to send to all participants





# 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**  
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, October 20th

### 10:00am CST

