

# SellWise User Group

Thursday, October 27<sup>th</sup> , 2022

## **Presenters**

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



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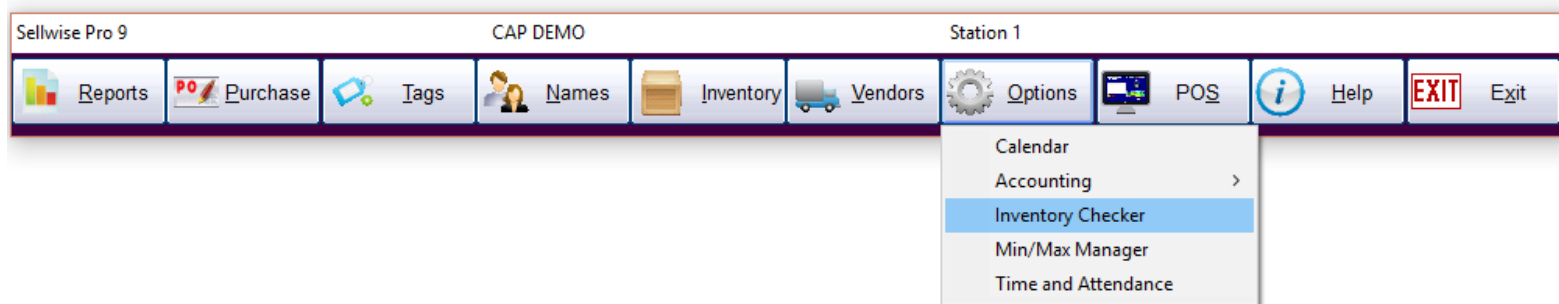
# User Group Topics

- Inventory Checker Training
- Inventory Checker Steps
- Cost/Price Update Process
- Value Analysis Reminder
- Most common CAP Service calls
- Updates



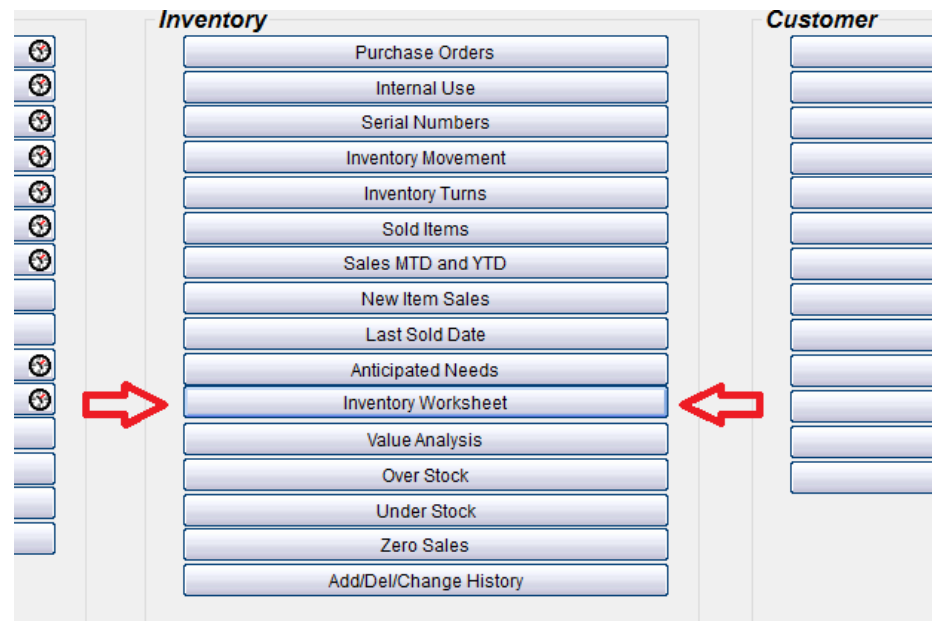
# Using Inventory Checker

- SellWise Toolbar
- Click Options – Inventory Checker
- Use on a regular basis and at year-end
- Use a Portable Data Collector or Paper



# Using Inventory Checker

- Take your physical inventory on Paper (no PDC)
- Create an Inventory Worksheet



# Inventory Worksheet

## Sort by

- ☒ Department
- ☐ Front Store Location
- ☐ Back Store Location
- ☐ Vendor

## Secondary Sort

- ☒ Item ID
- ☐ Description
- ☐ Stock Locator

## Include on Report

- ☒ Quantity on Hand
- ☒ Inventory Cost
- ☒ Price
- ☒ Blank Space
- ☒ Active Items Only (Sold or with quantity on hand)
- ☒ Stock Locator
- ☐ Non Decrementing Items

From

To

Departments

Exclude Department(s)

Front Location(s)

Back Location(s)



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# Inventory Worksheet

Inventory Worksheet

| 1  | 2     | Count | SL      | Item ID | Description      | Quantity<br>on Hand | Avg Cost | Total<br>Cost | Price | Total<br>Price |  |  |
|----|-------|-------|---------|---------|------------------|---------------------|----------|---------------|-------|----------------|--|--|
| 3  |       |       |         |         |                  |                     |          |               |       |                |  |  |
| 4  | Dept. |       |         |         |                  |                     |          |               |       |                |  |  |
| 5  |       | 267.  | 267     |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 6  |       | 268.  | 267-111 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 7  |       | 269.  | 267-112 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 8  |       | 270.  | 267-113 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 9  |       | 271.  | 267-114 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 10 |       | 272.  | 267-121 |         | Football Jerseys | 8                   |          |               |       |                |  |  |
| 11 |       | 273.  | 267-122 |         | Football Jerseys | 8                   |          |               |       |                |  |  |
| 12 |       | 274.  | 267-123 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 13 |       | 275.  | 267-124 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 14 |       | 276.  | 267-131 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 15 |       | 277.  | 267-132 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 16 |       | 278.  | 267-133 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 17 |       | 279.  | 267-134 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 18 |       | 280.  | 267-141 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 19 |       | 281.  | 267-142 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 20 |       | 282.  | 267-143 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 21 |       | 283.  | 267-144 |         | Football Jerseys | 9                   |          |               |       |                |  |  |
| 22 |       | 284.  | 267-151 |         | Football Jerseys | 26                  |          |               |       |                |  |  |
| 23 |       | 285.  | 267-152 |         | Football Jerseys | 12                  |          |               |       |                |  |  |
| 24 |       | 286.  | 267-153 |         | Football Jerseys | 7                   |          |               |       |                |  |  |
| 25 |       | 287.  | 267-154 |         | Football Jerseys | 5                   |          |               |       |                |  |  |
| 26 |       | 288.  | 267-211 |         | Football Jerseys | 8                   |          |               |       |                |  |  |
| 27 |       | 289.  | 267-212 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 28 |       | 290.  | 267-213 |         | Football Jerseys | 7                   |          |               |       |                |  |  |
| 29 |       | 291.  | 267-214 |         | Football Jerseys | 4                   |          |               |       |                |  |  |
| 30 |       | 292.  | 267-221 |         | Football Jerseys | 4                   |          |               |       |                |  |  |



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# Inventory Checker

Inventory Checker

File

**Input Stock Counts**

**Check Shelf Prices**

**Reports**

**Primary Lookup**

☒ Stock Locator

☐ Item ID

**Exit**



# Inventory Checker

Inventory Checker

**Step 1 : Add Inventory Items** | Step 2: Merge Data Files | Step 3: View Reports

**Import File Name**

New Import Name

☒ Inventory All Items  
☐ Inventory by Section

**Load Data From**

CipherLab Data Collector

Text File

Keyboard Entry

M3000/5000 Data Collector

**Select File**

View Selected File

Edit Selected File

Delete Selected File

Count File Location  
C:\Demodata\Count\Count08Nov16

Last invoice posted before Count: 0000934

Main Menu





# Inventory Checker

- After importing or keying in your inventory, you can merge your count files (if applicable) and then go to 'View Reports'.
- Review your count and your changes and then accept the changes to update your inventory.
- Go to: <https://www.posnation.com/bsa-resources>
- There are PDF and Video tutorials available



# Cost/Price Update



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# Cost/Price Update Tips

- Files are found via MyBSA

Wed, April 27, 2022 Welcome Russell! [Logout](#) Communities:   [My.Scouting](#) [? HELP](#)

**My BSA Home Page**

Home Membership Program Funding **Point of Sale** ScoutNET

Home Resources Administration

**Support** [ACH Report for STEM Bulk Upload](#) [Change My Password](#) [Member Care Calendar](#) [National Council Organization Chart](#) [National Council Telephone Directory](#) [Online Support Center](#) [Prime Pay Customer Service and Technical Support](#) [WePay Online Transaction Report](#)

**Engagement Tools and Resources** [Employee Engagement](#) [Download the Toolkit \(PDF\)](#)

**Fundraising** [Blackbaud CRM](#) [Blackbaud CRM Resources](#) [Blackbaud CRM User Guide](#) [Learn Blackbaud CRM \(self-study\)](#) [Scouting Gives Log-in](#) [Scouting Gives User Guide](#) [MatchFinder Matching Gifts Search](#)

**Reporting Setup** [BSA Structure](#)  [Sequence](#)

**National Council News Update**

For the latest official BSA news:

- [www.BSArestructuring.org](#): For more information and ongoing updates about the BSA's Chapter 11 bankruptcy.
- [Workplace](#): Connect, communicate, and collaborate with fellow employees on the BSA's Workplace site.
- [Scouting Wire](#): News and feature stories for employees and volunteers (with a weekly email newsletter)
- [Scouting Newsroom](#): The official media newsroom of the BSA.
- [Bryan on Scouting](#): The official blog of *Scouting* magazine.

**The BSA Game Plan**

The [The BSA Game Plan](#) is available for download to share internally with your team.

**Career Center**

[Explore our current career opportunities](#) for a meaningful career – not just a job.

**Council Flash**



# 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 Monday through Saturday. Confirmation reports older than 14 days will be archived.

Back Refresh Upload File

Email

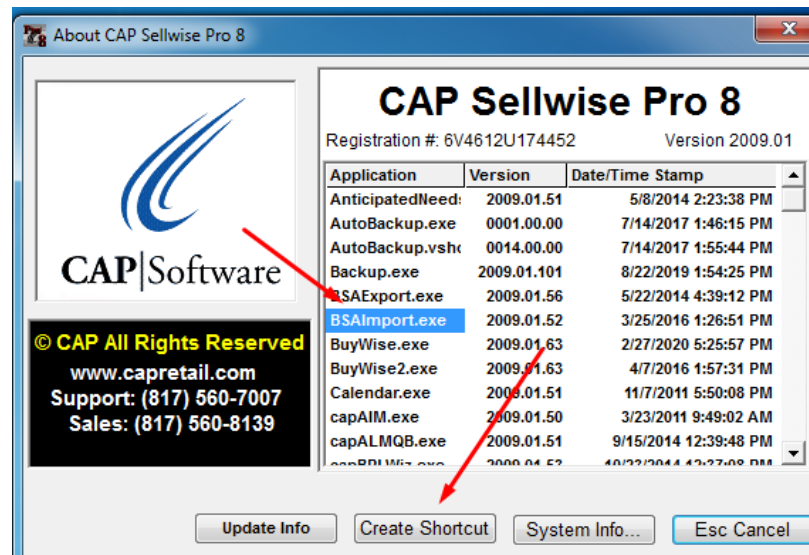
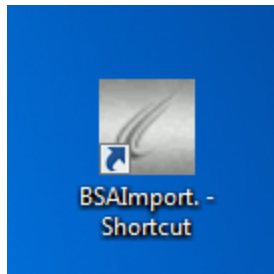
HOME

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



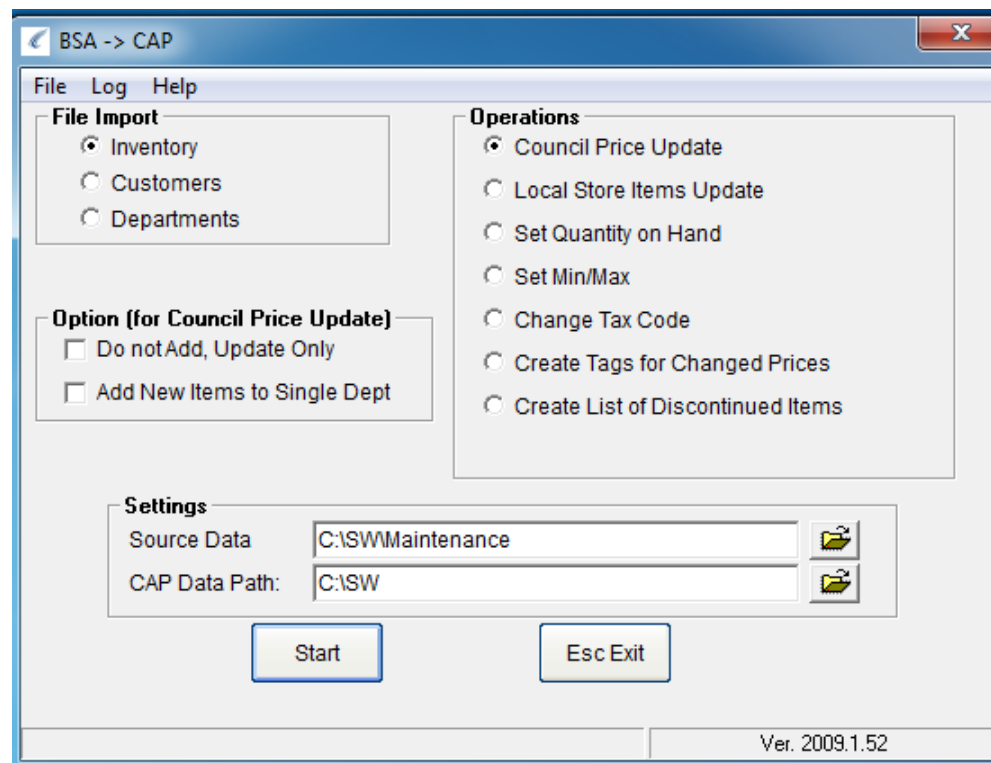
# Cost/Price Update Tips

- 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:



# Inventory Value Analysis



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# Inventory Value Analysis

- The Value Analysis Displays:
  - Number of item records
  - Total number of physical items
  - Retail Value of your inventory
  - Net (last cost) Value of your inventory
  - True (actual cost) Value of your inventory
  - Summary or Detail Format
  - Runs automatically at month end
  - Can be run manually any time





# SellWise Reports Menu

Reports Menu

**Sales**

- Sales Summary
- Transaction Summary
- Transaction Detail
- Tax
- Tender
- Credit Cards
- Gift Cards
- Cash Drawer
- Discounts
- Hourly Activity
- Sales by Department
- Sales by Item
- Sales by Vendor
- Store Performance
- Item Performance
- Vendor Performance

Only Reports with this icon allow Time based sorting.  
All others are Date Range only

**Inventory**

- Purchase Orders
- Internal Use
- Serial Numbers
- Inventory Movement
- Inventory Turns
- Sold Items
- Sales MTD and YTD
- New Item Sales
- Last Sold Date
- Anticipated Needs
- Inventory Worksheet
- Value Analysis
- Over Stock
- Under Stock
- Zero Sales
- Add/Del/Change History

**Customer**

- Cust. Sales Summary
- Sales Detail
- Invoice Summary List
- Mailing Lists
- Customer Purchases
- Layaway
- New Customers
- Accounts Receivable
- Price Levels
- Frequent Buyer Awards
- Membership
- Work Orders

**Employee**

- Sales and Commission
- Exceptions
- Payroll Deductions
- Staff Performance

**Custom**

- Tender by Department
- Item Sale Detail
- Markdown Sales
- Department Activity Summary
- Cost Center Sales

**Daily Reports**

- Daily Reports

**Graphs**

- Yearly Comparison
- Profit Performance
- Clerk Performance

**Export**

- Excel

**Select Store**

**Select Date Range**

☐ Year to Date  
1/1/2017-11/14/2017

☐ Month to Date  
11/1/2017-11/14/2017

☐ Week to Date  
11/12/2017-11/14/2017

☐ Yesterday

☒ Today  
11/14/2017

☐ All  
12/10/2007-10/31/2017

☐ Last Year  
1/1/2016-12/31/2016

☐ Last Quarter  
7/1/2017-9/30/2017

☐ Last Month  
10/1/2017-10/31/2017

☐ Last Week  
11/5/2017-11/11/2017

☐ Current Selection

Calendar

**Select Date and Time Ranges**

11/14/2017 to 11/14/2017

12:00 AM to 11:59 PM

**Select Period**

Totals Only

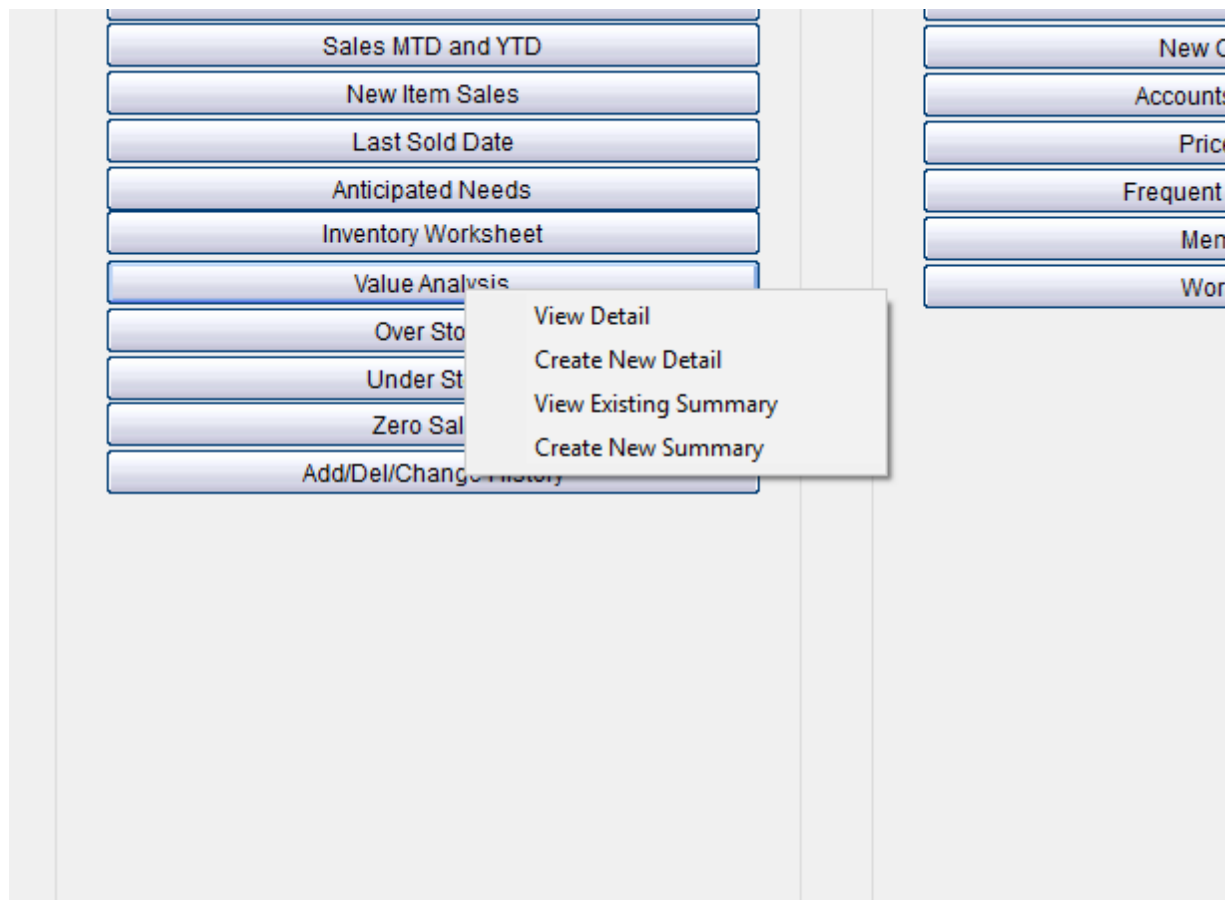
(used only for Sales Performance)

**Help**

**Esc Exit**



# Value Analysis Options



# Detail Selection – Saved Snapshots

The screenshot displays a software interface with a 'Select Criteria' dialog box open. The dialog box contains the following fields and options:

- Select Date:** A dropdown menu is open, showing a list of dates from 9/30/2017 down to 7/31/2016. The date 9/30/2017 is currently selected.
- Vendor:** A text input field with a 'Select' button next to it.
- Department:** A text input field.
- Show Details:** A checkbox that is currently checked.
- S/L Range:** A text input field containing the number '1'.
- Account:** A text input field with a dropdown arrow.

In the background, there are several buttons and labels:

- Buttons: Over Stock, Under Stock, Zero Sales, Add/Del/Change History, Exceptions, Payroll Deductions, Staff Performance.
- Labels: Vendor Analysis, Work Orders, Employee, Sa.



# Detail Output

Value Analysis as of 9/30/2017

| Detail Analysis |      |             |                           |          |              |                          |                              |
|-----------------|------|-------------|---------------------------|----------|--------------|--------------------------|------------------------------|
| 1               | SL   | Item ID     | Description               | Quantity | Retail Value | Net Value<br>(Last Cost) | True Value<br>(Average Cost) |
| 2               |      |             |                           |          |              |                          |                              |
| 3               | 1.   | SNYCDX44    | Component Cd Player       | 5        | 1512.50      | 1209.26                  | 1208.89                      |
| 4               | 3.   | S1810081    | Streamer- 24"             | 63       | 330.75       | 46.62                    | 49.50                        |
| 5               | 4.   | B1814862    | Balloons-Vinyl            | 45       | 93.15        | 40.05                    | 40.05                        |
| 6               | 5.   | B1811588    | Name Badges               | 45       | 180.00       | 104.06                   | 104.06                       |
| 7               | 7.   | D0793601    | Moonwood Deck Stain Blue  | 18       | 445.32       | 270.00                   | 270.00                       |
| 8               | 8.   | D0795701    | Moonwood Deck Stain Brown | 23       | 493.12       | 299.00                   | 299.00                       |
| 9               | 13.  | S315003     | Screw                     | 18       | 80.28        | 43.74                    | 43.74                        |
| 10              | 14.  | C314989     | Cover                     | 9        | 122.76       | 66.96                    | 66.96                        |
| 11              | 15.  | P315000     | Plate                     | 11       | 21.12        | 11.55                    | 11.55                        |
| 12              | 29.  | ICE         | Ice Bag Small             | 5        | 1562.45      | 2.50                     | 2.50                         |
| 13              | 54.  | 100-Ig03343 | Aspirin- Bayer            | 30       | 195.00       | 90.00                    | 90.00                        |
| 14              | 221. | 221         | Hand Creme-Stress Relief  | 14       | 112.00       | 28.00                    | 28.00                        |
| 15              | 222  | AHG-11245   | Antibacterial Hand Gel    | 6        | 40.50        | 9.00                     | 8.92                         |
| 16              | 223. | 223         | Bologna                   | 72       | 143.28       | 54.00                    | 30.00                        |
| 17              | 224. | 224         | Rental Test Item          | 20       | 400.00       | 40.00                    | 40.00                        |
| 18              | 262. | 262         | Rental Car                | 14       | 140.00       | 28.00                    | 28.00                        |
| 19              | 268. | 267-111     | Football Jerseys          | 4        | 480.00       | 60.00                    | 60.00                        |
| 20              | 269. | 267-112     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 21              | 270. | 267-113     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 22              | 271. | 267-114     | Football Jerseys          | 4        | 480.00       | 120.00                   | 120.00                       |
| 23              | 272. | 267-121     | Football Jerseys          | 7        | 840.00       | 350.00                   | 350.00                       |
| 24              | 273. | 267-122     | Football Jerseys          | 8        | 960.00       | 400.00                   | 400.00                       |
| 25              | 274. | 267-123     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 26              | 275. | 267-124     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 27              | 276. | 267-131     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 28              | 277. | 267-132     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 29              | 278. | 267-133     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 30              | 279. | 267-134     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 31              | 280. | 267-141     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 32              | 281. | 267-142     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 33              | 282. | 267-143     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 34              | 283. | 267-144     | Football Jerseys          | 9        | 1080.00      | 450.00                   | 450.00                       |
| 35              | 284. | 267-151     | Football Jerseys          | 26       | 3120.00      | 1300.00                  | 1300.00                      |
| 36              | 285. | 267-152     | Football Jerseys          | 12       | 1440.00      | 600.00                   | 600.00                       |
| 37              | 286. | 267-153     | Football Jerseys          | 7        | 840.00       | 350.00                   | 350.00                       |
| 38              | 287. | 267-154     | Football Jerseys          | 5        | 600.00       | 250.00                   | 250.00                       |
| 39              | 288. | 267-211     | Football Jerseys          | 8        | 960.00       | 400.00                   | 400.00                       |
| 40              | 289. | 267-212     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 41              | 290. | 267-213     | Football Jerseys          | 7        | 840.00       | 350.00                   | 350.00                       |
| 42              | 291. | 267-214     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 43              | 292. | 267-221     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 44              | 293. | 267-222     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 45              | 294. | 267-223     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 46              | 295. | 267-224     | Football Jerseys          | 12       | 1440.00      | 600.00                   | 600.00                       |
| 47              | 296. | 267-231     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 48              | 297. | 267-232     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 49              | 298. | 267-233     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 50              | 299. | 267-234     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 51              | 300. | 267-241     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 52              | 301. | 267-242     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 53              | 302. | 267-243     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |
| 54              | 303. | 267-244     | Football Jerseys          | 4        | 480.00       | 200.00                   | 200.00                       |

Sort By

☐ S/L ☐ Description ☐ Item ID

Find

Print

Save as  
Spreadsheet

Cancel



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# Summary

Anticipated Needs

Inventory Worksheet

Add/D

Frequent Buyer Awards

Membership

Inventory Analysis 11/14/2017

|                                |           |
|--------------------------------|-----------|
| Inventory Records in Analysis  | 291       |
| Total Number of Items          | 1876.     |
| Retail Value                   | 65,884.62 |
| Net Value (Using last cost)    | 34,204.09 |
| True Value (Using actual cost) | 34,192.14 |

Print

Save as Spreadsheet

Cancel

Processing Inventory Records

Month to Date  
11/1/2017-11/14/2017

Week to Date  
11/2/2017-11/14/2017

Yesterday

Today  
11/14/2017

10/2007-10/31/2017

11/14/2017

12:00 AM

Select Period

Totals Only



# Value Analysis Recap

- It is a snapshot in time, not a date range
- You can view summary, or detail by item
- SellWise makes a snapshot at month end
- Can manually create at any time
- Auditors often want to see the value of your inventory at a point in time, this is what they need



# 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
- Inventory Checker!
- Configuration questions



# Updates

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





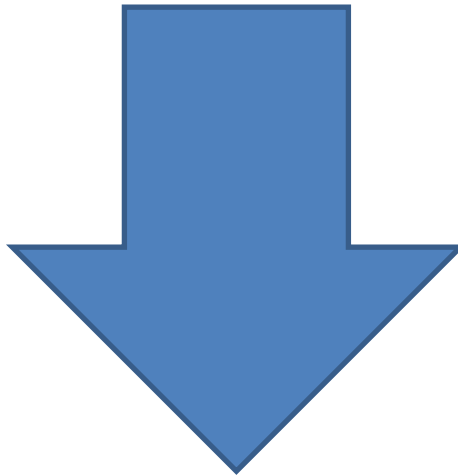
# Backing up SellWise

- 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



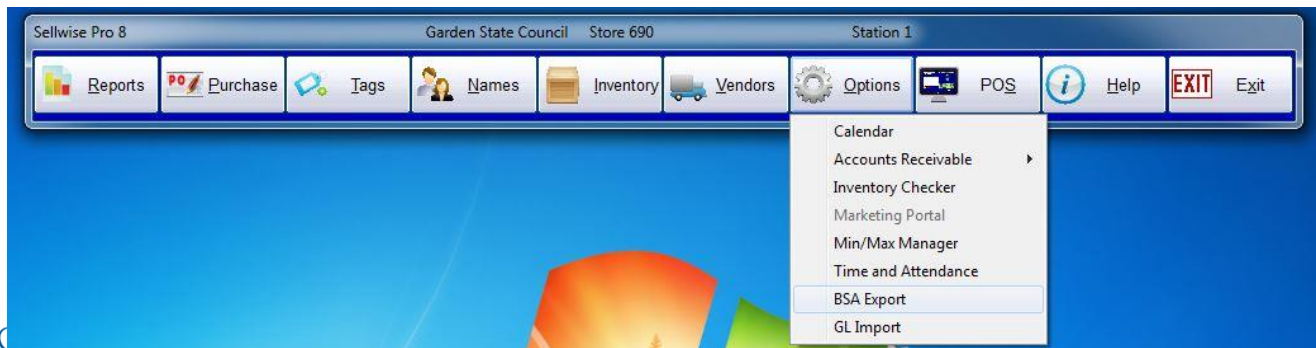
## **If you have questions:**

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

Join Give Shop My.Scouting Login

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, November 17th

### 10:00am CST

