

SellWise User Group

Thursday, November 17th, 2022

Presenters

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



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User Group Topics

- Cash Discounting Primer
- Password Reset Utility
- Inventory Checker Steps
- Most common CAP Service calls
- Updates



Cash Discounting – What is it?

- Cash Discounting passes CC fees to the customer
- Cash Discounting vs. Surcharging
- Pros/Cons
- Market fit: Good for high volume/low relationship stores – liquor, c-store, casual restaurant. NOT a good fit for Councils
- WorldPay does not support Cash Discounting



Password Reset Utility

- Included in the update when you call
- Must be turned ON in Store Settings – Have you done this?
- Users MUST setup their questions. Do Not Select 'Cancel' when prompted to setup questions
- If locked out, Press the Green button at login to access your security questions



Password Reset Utility

- Help → Configuration → Store Settings

CAP Configuration - Store Settings

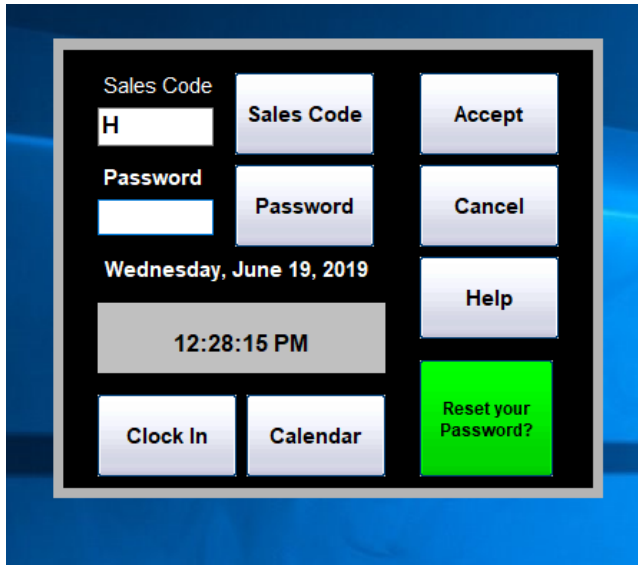
GENERAL	
Strong Security Password required	Yes
Use Security Questions for Password Reset	Yes
Order of Lookup: Inventory List	Description
Order of Lookup: Name List	Phone
Show Phone not ARCode on Lookup: Name List	Yes
Order of Lookup: Vendor list	Business
Date Format	United States
Country	United States
POS	



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Password Questions



A screenshot of a login interface. It features a grid of buttons and input fields. The top row has a 'Sales Code' label, a text box containing 'H', a 'Sales Code' button, and an 'Accept' button. The second row has a 'Password' label, an empty text box, a 'Password' button, and a 'Cancel' button. Below these is the date 'Wednesday, June 19, 2019' and a grey box showing the time '12:28:15 PM'. At the bottom, there are 'Clock In' and 'Calendar' buttons on the left, and a 'Help' button and a green 'Reset your Password?' button on the right.

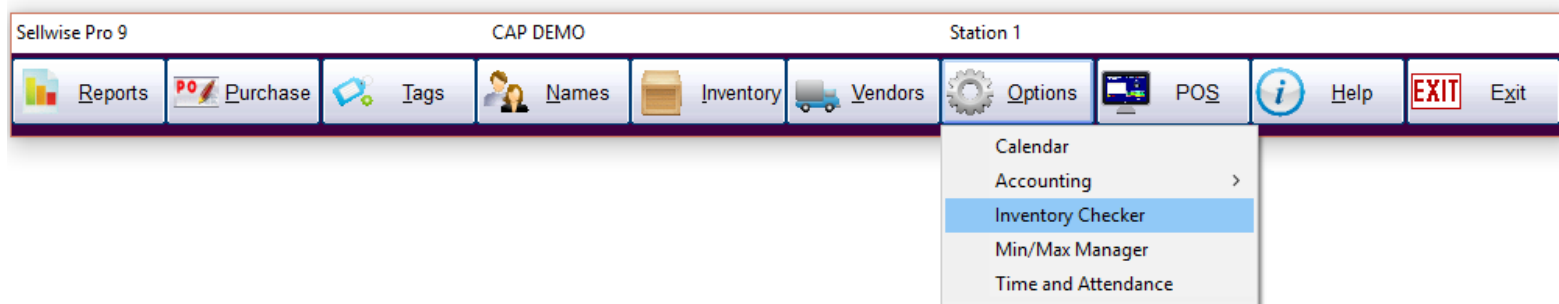


A screenshot of the same login interface as the previous one, but with a 'Security Question' dialog box overlaid. The dialog box has a title bar with a close button and contains the text 'What is your mother's Maiden Name?' followed by an empty text box. At the bottom of the dialog are 'Accept' and 'Esc Cancel' buttons. The background interface is partially visible behind the dialog.



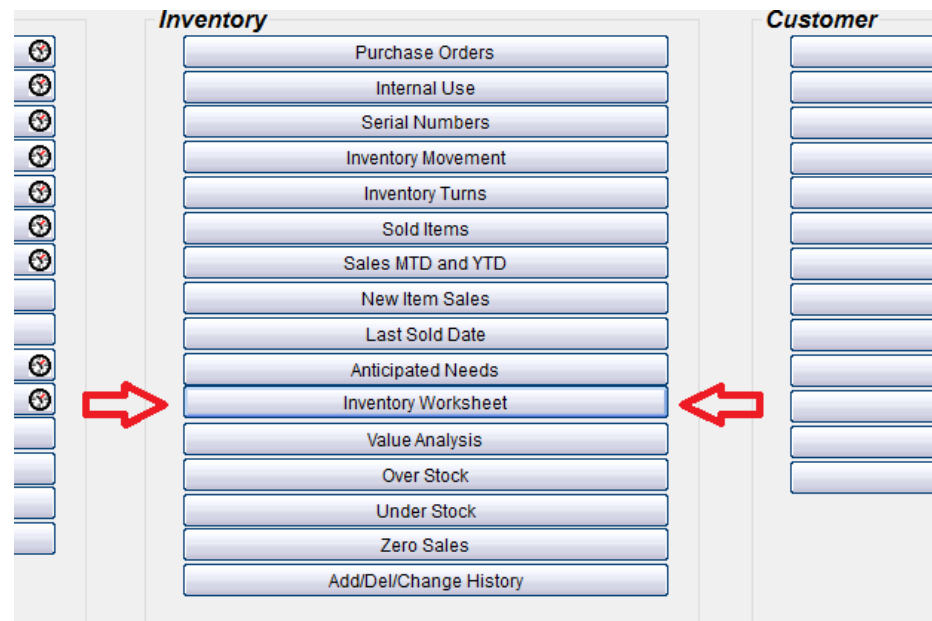
Using Inventory Checker

- 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 on Hand	Avg Cost	Total Cost	Price	Total 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

Intput 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



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



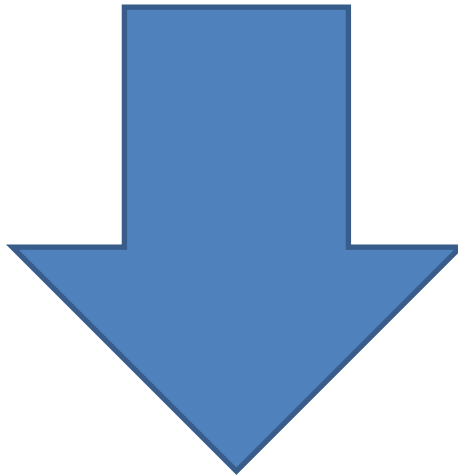
Backing up SellWise

- 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



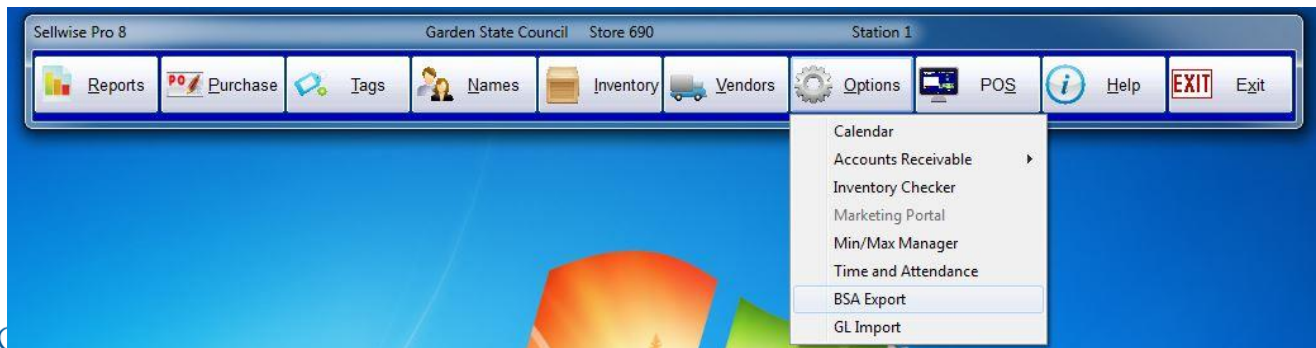
If you have questions:

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



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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

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, December 15th

10:00am CST

