

# SellWise User Group

Thursday, March 23rd, 2023

## **Presenters**

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



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# User Group Topics

- Prep for Summer Camp
- Open Discussion – Needs?
- Price Update Discussion
- Most common CAP Service calls
- Updates



# Prepping for Summer Camp – Main Office

- Ensure registration fees are setup
  - Any new activities/registrations?
- Have correct accounts setup for charges
- Notify units of account balances
  - Do you send statements?
- Ensure staff are trained to enter registration dates, etc. correctly in SellWise



# Prepping for Summer Camp – Camp Location

- Confirm all computer equipment is working
- Find all peripherals/cables
- Make sure CC processing is active
- Receipt paper?
- Add camp specific inventory:
  - Snacks
  - Drinks
  - T-shirts



# Open Forum - Council Needs?

- What issues are your stores and offices facing today?
- What tasks could your POS be simplifying for you?
- What reports do you need that you don't have?
- What else can we do for you?



# Price Update Issues

- File must be downloaded from BSA site
- Please ensure file is saved to:
  - C:\SW\Maintenance
  - Run the BSA Import utility from your desktop or C:\Program Files\CAP



# Price Update Issues

Note:

- Not ALL items are in recent files. If specific items are not updating, you can check to confirm that they are in the file
- We've had multiple cases recently with items not updating simply because they weren't in the file
- Typical of older catalog items or items that have been updated
- UPC is a record key, so your SW must have UPCs



# Price Update Issues

## Potential Issues:

- Error 88 – SellWise must be closed on all stations. This error means a user is logged into SellWise
- Prices are incorrect – confirm item is in file with expected price
- Missing file error:
  - The file is saved to Downloads or another incorrect location
  - The file type is incorrect





# Common CAP Service Calls

- Price Import – how to, confirmation of process, user guide available online
- Replacement Computers/Pinpad
- Configuration questions



# Updates

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



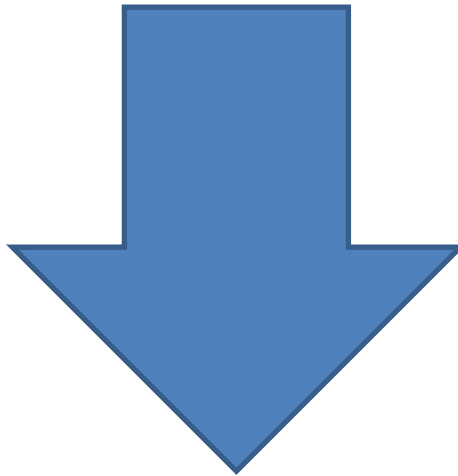
# Backing up SellWise

- 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



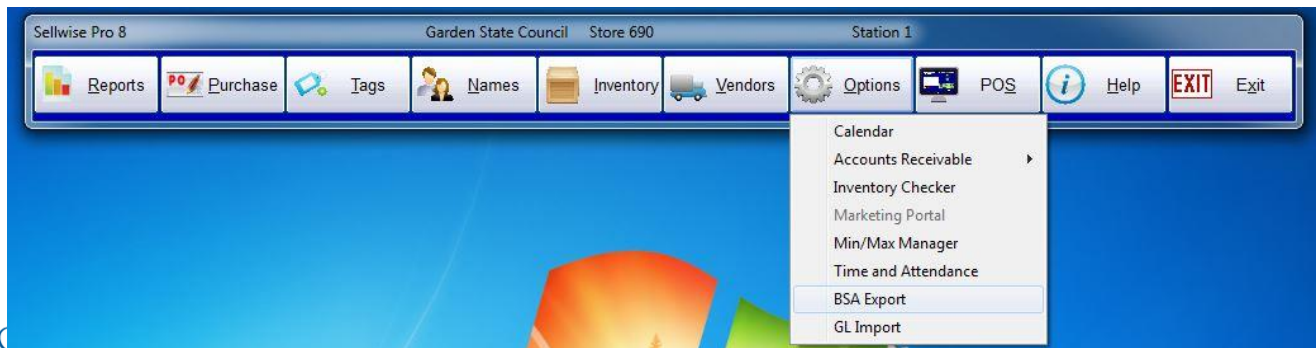
## **If you have questions:**

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, April 20th

## 2:00 PM CDT

