

SellWise User Group

Thursday, December 14th, 2023

Presenters

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



User Group Topics

- 2023 Updates to SellWise
- Inventory Checker Steps
- Most common CAP Service calls
- Updates



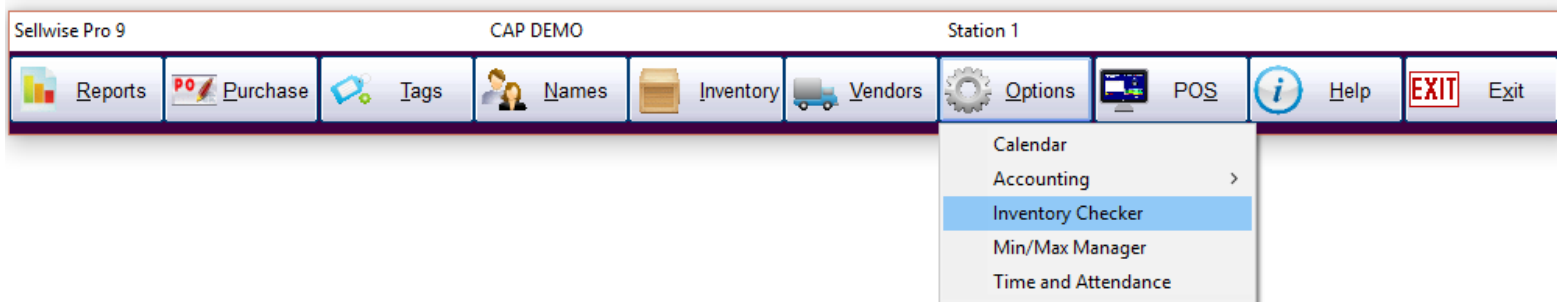
Updates to SellWise in 2023

- Q1:
 - Payment middleware security update
 - Bug fixes
 - Email enhancements
- Q2-Q3:
 - New pinpads supported (for EOL scenario)



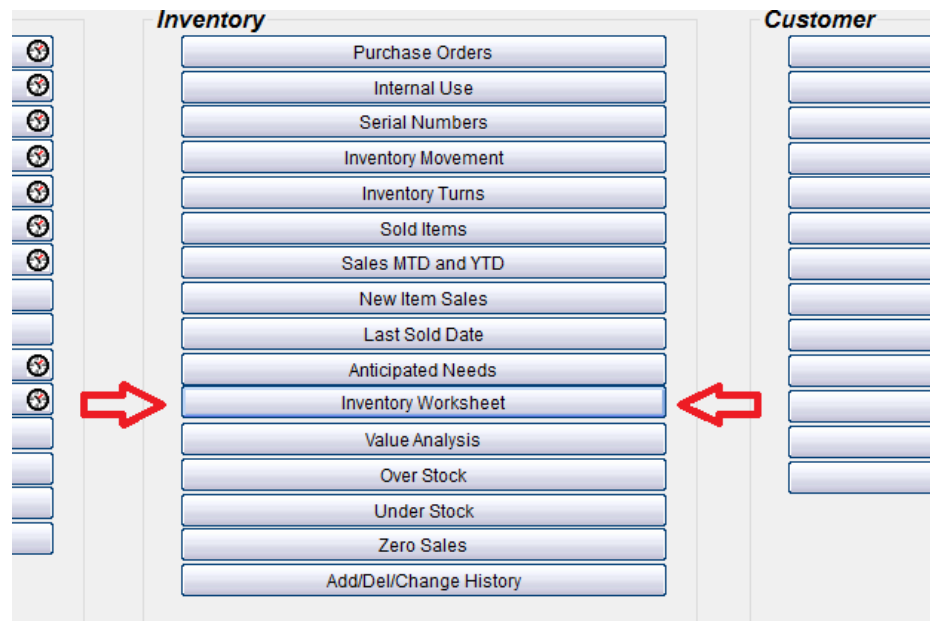
Using Inventory Checker

- 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)



Inventory Worksheet

Inventory Worksheet

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



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

Select File

Count File Location

Last invoice posted before Count: 0000934



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 <http://www.capretail.com/bsasupport/>
- There are PDF and Video tutorials available



Common CAP Service Calls

- Housekeeping note: Please call BSA Customer Care and select SellWise to direct access to the best help
- Setup/Training/Pinpads
- General Ledger questions – Get the manuals before adding/changing if you're not sure
- Inventory Checker!



Updates

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



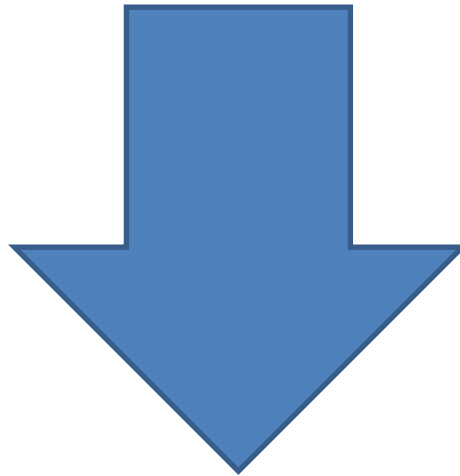
Backing up SellWise

- 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

Home > Council Support > Council Funding and Finance

Council Funding and Finance

Funding a Council and assuring proper financial management of the Council Board. The material presented in this Section provides information that is designed to be used by both Volunteers and Council Administrators.

- Financial Planning
- Funding the Council
- Council Administration**
- Local Council Financial Audits
- Back Office Business Solutions

BSA-COVID-19 Financial Resources

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

QUESTIONS!

Next Meeting

Thursday, February 15th

10:00am CST

