SellWise User Group

Thursday, March 28th, 2024

Presenters

Will Atkinson, VP of Customer Experience – POS Nation

Don Day, Team Lead, Shared Services

User Group Topics

- Remote Access Do’s and Don’ts.
- Moving Money Between Unit Accounts
- Most common CAP Service calls
- Updates

Remote Access Guidelines

- DO use a robust remote access client. Pulse Secure available from National. Others: GoToMyPC, LogMeIn, Join.me
- DON'T use freeware or leave firewalls open
- DO close connections when not in use
- DON'T take your PC home to connect to SellWise via the internet. You MUST remote into your office PC on the network
- DO process registrations, fees, item orders, etc.

Remote Access Guidelines

- DO process Cash, Check, and On Account Payments.
- DON'T try to key in credit cards via remote access. Store card numbers securely until they can be keyed in on your secure device.
- DO access your Cloud programs such as Registrar Tools, Peoplesoft, Blackbaud, etc.
- DON'T hesitate to call us with questions

Moving Money Between Unit Accounts

- Specific Steps are required to move money between GL Accounts
- User guide: https://www.posnation.com/bsa-resources (about halfway down the page)
- Don't Delete the old accounts after removing funds. These are useful for historical reporting.
- Rename if desired, but please do not delete

Moving Money Between Unit Accounts

1. Find the item called "Adjust Unit Account" or similar in Inventory
2. GL# 1234100000 = Custodial account
3. If not present, add a new item for this purpose. GL# - Sub Description. Vendor/Dept 90. No cost/Price. Non-decrementing = Y

Moving Money Between Unit Accounts

4. In the POS, select the “Adjust Unit Account” item
5. Set the Price to the amount of funds that need to be moved.
6. Select the old/incorrect Unit where the funds are present
7. Tender the sale to On Account and complete.

Moving Money Between Unit Accounts

8. Ring up the "Adjust Unit Account" item
9. Set the Price to the amount of funds that need to be moved.
10. Select the new/correct Unit Account
11. Click 'Exceptions' then 'Return' under the "Sale" Column
12. Select the 'On Account' Tender and complete.

Inactive Unit Accounts

To Move Funds from Inactive Accounts to a Custodial account for Inactive Units:

1. Find or set up an item for “Move Inactive Funds.” GL# 1278200000
2. In the POS, select the “Inactive” Unit Account
3. Ring up the “Move Inactive Funds” item
4. Set the sale amount to the inactive balance amount
5. Tender the Sale to “On Account”

Common CAP Service Calls

- User lockouts – Get the update!
- General Ledger questions – Get the manuals before adding/changing if you're not sure
- Adding Users
- Moving/Adding PCs

Updates

- How to ask Questions of the presenters
- Inventory myth
- CAP Backup serice
- Where this presentation will be online
- Customer Service Survey

If you have questions:

1. Look for horizontal bars at bottom of your screen
2. Unmute your microphone and ask or
3. Click on Chat, type in your question and hit enter to send to all participants

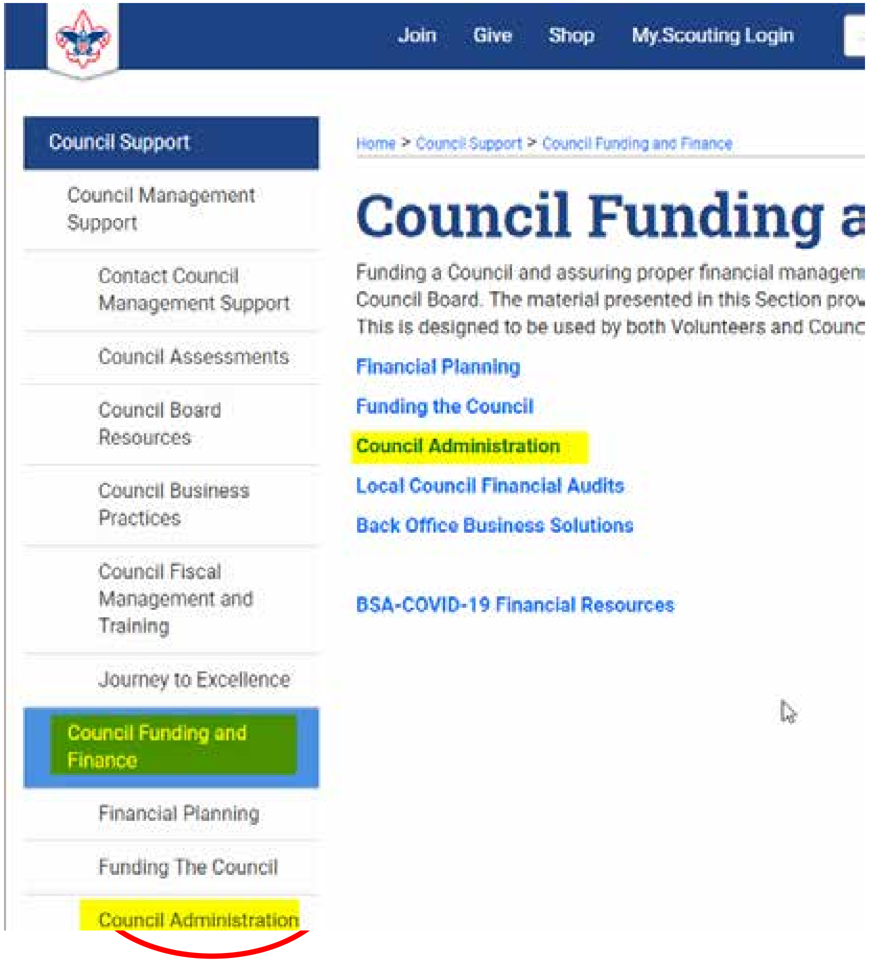
Common Myth: Inventory is once a year

- 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

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

Slides and recording posted on **scouting.org/financeimpact** Look on the Council Administration Page, then look at the bottom for Sellwise Support/User Group link



QUESTIONS!

Next Meeting

Thursday, April 18th

2:00 pm CDT