Little Brownie® BAKERS

eBudde

# Service Unit User Manual
# September 1, 2009

**https://ebudde.littlebrownie.com**

# Table of Contents

# Computer Specifications Information

The eBUDDE system has been tested on a variety of computer types and different web browsers.

**Approved web browsers:**
IBM Compatible – Microsoft Internet Explorer version 7.0 and higher
Macintosh – Safari 2.0.4, Camino 1.5.4, and Firefox 2.0.x

**Approved computer specifications:**
*Recommended Minimums:*

| | Firefox | Internet Explorer |
|---|---|---|
| Council: | 1.5 GHz 512MB RAM | 1.5 GHz 768MB RAM |
| Area/SU: | 1.0 GHz 512MB RAM | 1.0 GHz 768MB RAM |
| Troop: | 700 MHz 384MB RAM | 700 MHz 384MB RAM |

*Recommended Systems*:

| | Firefox | Internet Explorer |
|---|---|---|
| Council: | 1.5 GHz 768MB RAM | 2.0 GHz 1 GB RAM |
| Area/SU: | 1.0 GHz 768MB RAM | 1.5 GHz 1 GB RAM |
| Troop: | 1.0 GHz 512MB RAM | 1.0 GHz 768MB RAM |

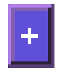
To verify your system specification, go to **Control Panel, System**. The general tab will display your system information.

**NOTE: If your computer's performance is too slow, we can recommend downloading of the Firefox browser. This will increase your speed usually about 30%. The download can be found at http://www.mozilla.com.**
The eBUDDE system uses Microsoft Excel for the printing of the reports. If you have users that do not have the Microsoft Excel program, a report viewer for IBM compatible systems can be downloaded from the following web address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=c8378bf4-996c-4569-b547-75edbd03aaf0&DisplayLang=en

# Navigating the System

**Add More** - The “add more” button allows you to enter in additional rows on deposits and additional cookie transactions. You can activate this button by pressing the spacebar or clicking on it.




**Enter Key** – The enter key is used to complete a row on a page. It can also be used to complete a page when the page has only one button available on the page.

**Tabs** – The tabs available on the page allow you to add, change, delete or view information. These tabs are specific to the user access level. Council users see the council tabs, areas see the area tabs, service units see the service unit tabs, troops see the troop tabs. Below is an example of the council tabs. To select a tab, click anywhere on the tab.


**Tab Key** – The tab key is used to move from one box of information to another on all screens.

# System Access

Your council/designated volunteer will set you up as a user. An email will then be sent to you by the eBUDDE system.

The eBUDDE system sends every new user an email with the following information:

- Web Address – https://ebudde.littlebrownie.com/index.php
- Email Address
- Temporary Password

We recommend you click the link in the email sent to you from the eBUDDE system and then in your browser, add this web address to your **Favorites** for easier access.


The login screen consists of three parts:

- Login information
- Updating contact information
- Forgotten password

## *Login Information*

Current users will enter in their email address and **personal** password.  Click the **Log On** button or press enter to complete your login information.  The system will then access your council's information.

New users will enter in their email address and **temporary** password sent to you in the email from the system.  Click the **Log On** button or press enter to complete your login information.   The system will then direct you to the **Contact Information Page**.  Once you have completed the contact information page click **Submit.**  The system will then log you into the system.

## *Contact Information Page*

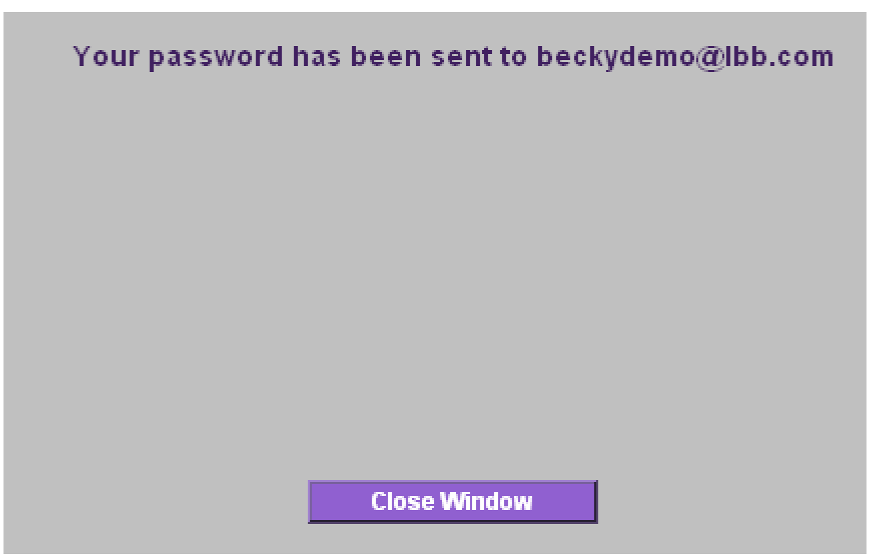
Current users – This form is available to make changes to your password, email address and personal information.  To access this page click on the link provided on the login page.


New users – You will be required to fill out this form the first time you try to access the eBUDDE system.  **You must change your password to something other than the temporary password.**  All the information on this form is mandatory.  Once you have entered in all the information click the **Submit** button or press **Enter.**  The system will then log you into the system.

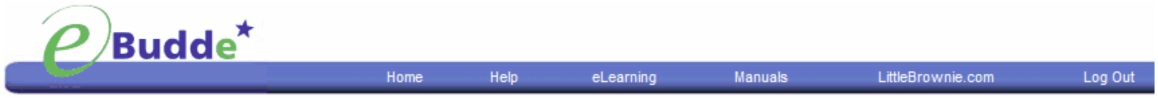
## *Forgotten Password*

**A forgotton password does not require a phone call!**


You have the ability to get your password. If you forget your password, key in your email address and press the **Click Here** link on the login page. The system will verify that it has sent your password to your email address. Click the **Close Window** button and you will be returned to the login page. You will then receive and email from the system with your password.



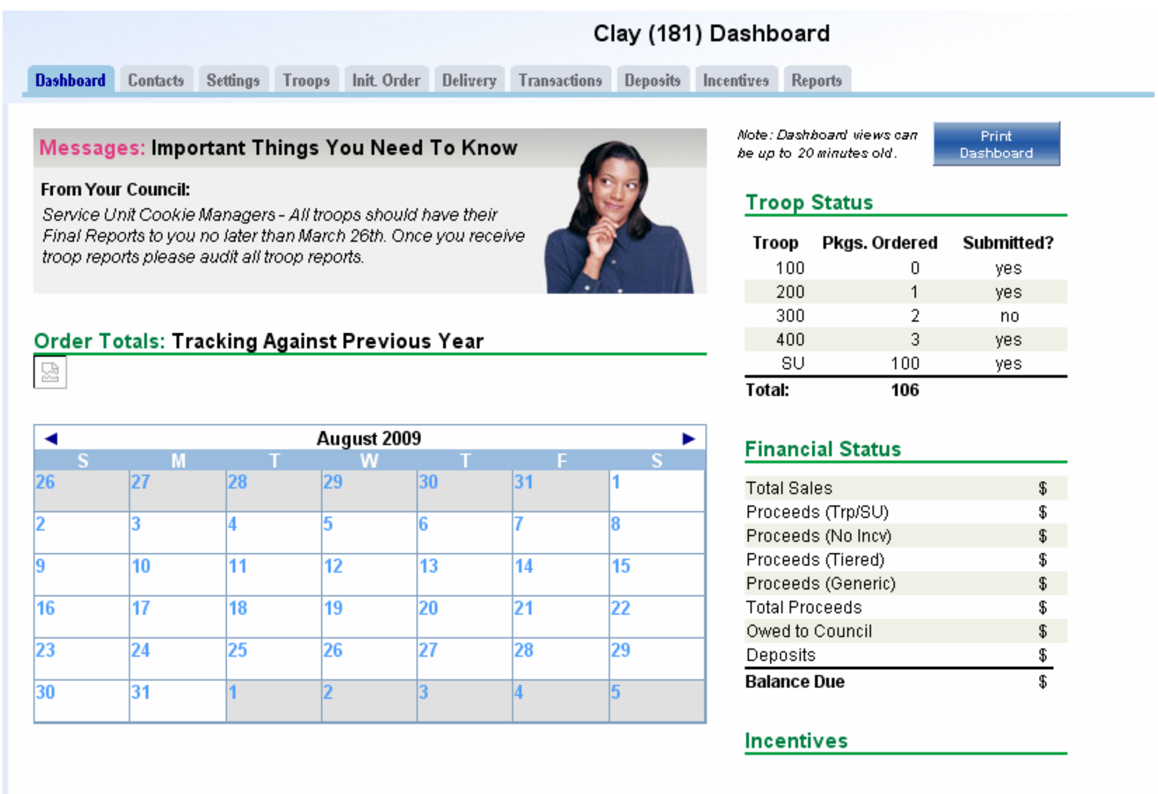
# Menu Bar




The Menu Bar provides additional support for you in eBUDDE.

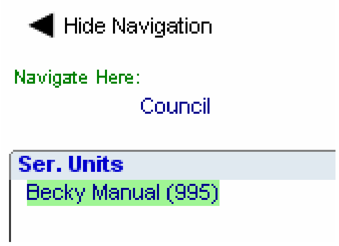
**Home –** This option brings you back to the dashboard screen
**Help -** Help provides you detailed information on all screens. It is setup in categories and gives you additional information for inputting data in the different screens.
**eLearning** – Learning modules for troop users
**Manuals** – This provides a manual in Adobe Acrobat PDF format for your reference
**LittleBrownie.com** – This provides a link for you to go to the Little Brownie website that has additional resources.
**Log Out** – This allows you to log out of the system.


The **Hide Navigation** feature allows you to hide the display of the navigation tree. Click the arrow to toggle this feature on and off. This can be helpful if the form on the right that you are trying to fill out goes off the screen. It will move all the information over to the left. Compare the screen to the left with the one below.

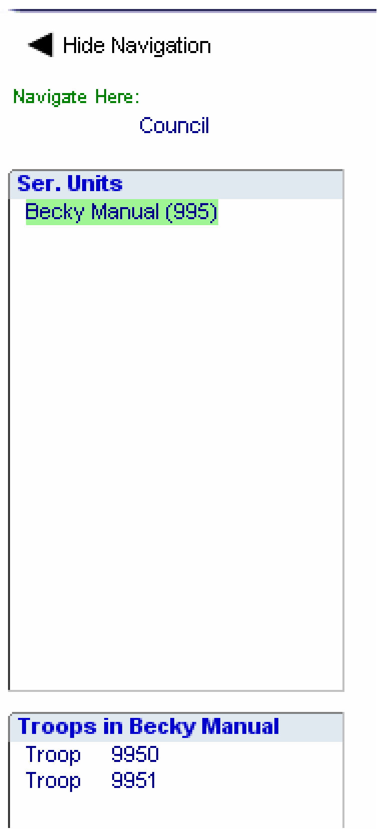


# Navigation Tree

Once you enter the system, you will notice that the screen is divided into two sections.




The navigation tree will start with your service unit name and number. As you create your troops this tree will expand to list all your troops.



# Service Unit Tabs

On the service unit level the following options are available using a tab method similar to file folders in a filing cabinet.  To access a tab, click the tab name and the system will display the appropriate page.


**Dashboard –** The dashboard gives you an up-to-minute snapshot of your troops orders, goals, financials and per girl averages.
**Contacts** - The contacts tab is used to view the service unit level users name, personal information, email and passwords.
**Settings** – The settings tab will allow a service unit to specify how the data will be entered for the service unit and to add additional service unit level users.
**Troops** – The troops tab is for adding, changing, and/or deleting troops.
**Init. Order** – The Init. Order tab is to verify troop cookie initial orders and submitting the troop/service unit order to the council.  This tab is also used for service units using the "Fast Order Entry" which allows create troop totaled orders.
**Delivery** –  The delivery tab is used by service units to select their service unit delivery station (if applicable)
**Transactions** - This tab is to move cookies from the service unit to the troops (if applicable)  The service unit then can see their inventory for cookies.
**Incentives** – The incentives tab is for service units to verify troop incentive orders and submit order to the council.
**Reports** – The reports tab is for service units to print reports for cookie orders, incentive orders, deposits and inventory transactions.

## *Dashboard*

When you enter the screen the system will display the navigation tree and the dashboard.  The dashboard shows messages from your council staff or area manager (if applicable)  It also will show you the current status of troop cookie orders, incentive orders and financials.  It will remind you of all the deadline dates for the current sale.  There are also graphs on orders, goals and per girl averages.  All of these graphs are printable using the **Print Dashboard** button.

# Lemon Grove (673) Dashboard

Dashboard | Contacts | Settings | Troops | Init. Order | Delivery | Transactions | Deposits | Incentives | Reports

## Messages: Important Things You Need To Know

From Your Council:
*Message from council*

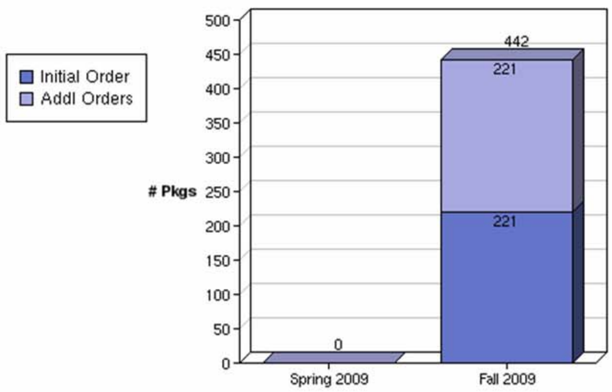
*Note: Dashboard views can be up to 20 minutes old.*

Print Dashboard

## Troop Status

| Troop | Pkgs. Ordered | Submitted? |
|---|---|---|
| 6073 | 877 | yes |
| 6731 | 1774 | yes |
| SU | 0 | no |
| **Total:** | **2651** | |

## Order Totals: Tracking Against Previous Year




## Financial Status

| | | |
|---|---|---|
| Total Sales | $ | 64.00 |
| Proceeds (Trp/SU) | $ | 96.80 |
| Proceeds (No Incv) | $ | 0.00 |
| Proceeds (Tiered) | $ | 0.00 |
| Proceeds (Generic) | $ | 0.00 |
| Total Proceeds | $ | 96.00 |
| Owed to Council | $ | -32.00 |
| Deposits | $ | 6,135.60 |
| **Balance Due** | $ | **-6,167.60** |

## Incentives

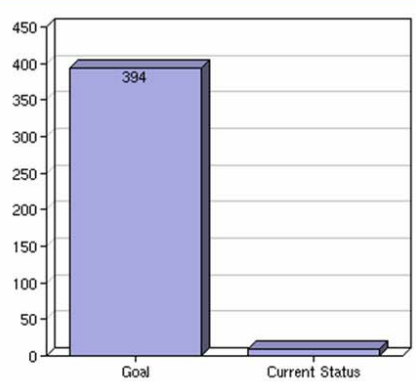
| | |
|---|---|
| Cookie Star Patch Pin | 0 |
| Theme Patch | 0 |
| Tie Dye Bandana | 0 |
| 100+ Bar Patch | 0 |
| Panda Journal | 0 |
| Wristlet Wallet | 0 |
| 200+ Bar Patch | 0 |
| T-Shirt for Small Panda | 0 |
| Miranda Panda Plush (Small) | 0 |
| 300+ Bar Patch | 0 |
| Tie Dye Tote Bag | 0 |
| 400+ Bar Patch | 0 |
| Pink Fleece Blanket with Tie Dye | 0 |
| Invite to the 500+ Club Finale | 0 |
| Pillow Case with Tie Dye Trim | 0 |
| 500+ Bar Patch | 0 |
| 600+ Bar Patch | 0 |
| 700+ Bar Patch | 0 |
| 800+ Bar Patch | 0 |
| 900+ Bar Patch | 0 |
| 1000+ Bar Patch | 0 |
| Add-a-Member Patch | 0 |
| Booth Sale Patch | 0 |
| Gift of Caring Patch | 0 |
| I Called Back Patch | 0 |
| Cookie Walkabout Patch | 0 |
| Panda Classic Tee | 0 |
| Goal Achiever Bar Patch | 0 |
| $75 GSCM Gift Card | 0 |

**September 2009**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 Troop Delivery Conf avail. Troop Order avail. Troop Final Incv avail. Troop Settings avail. Girl Tab avail. Su Final Incv avail. | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 Su Troop avail. |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

## Goals: Distance to Goal

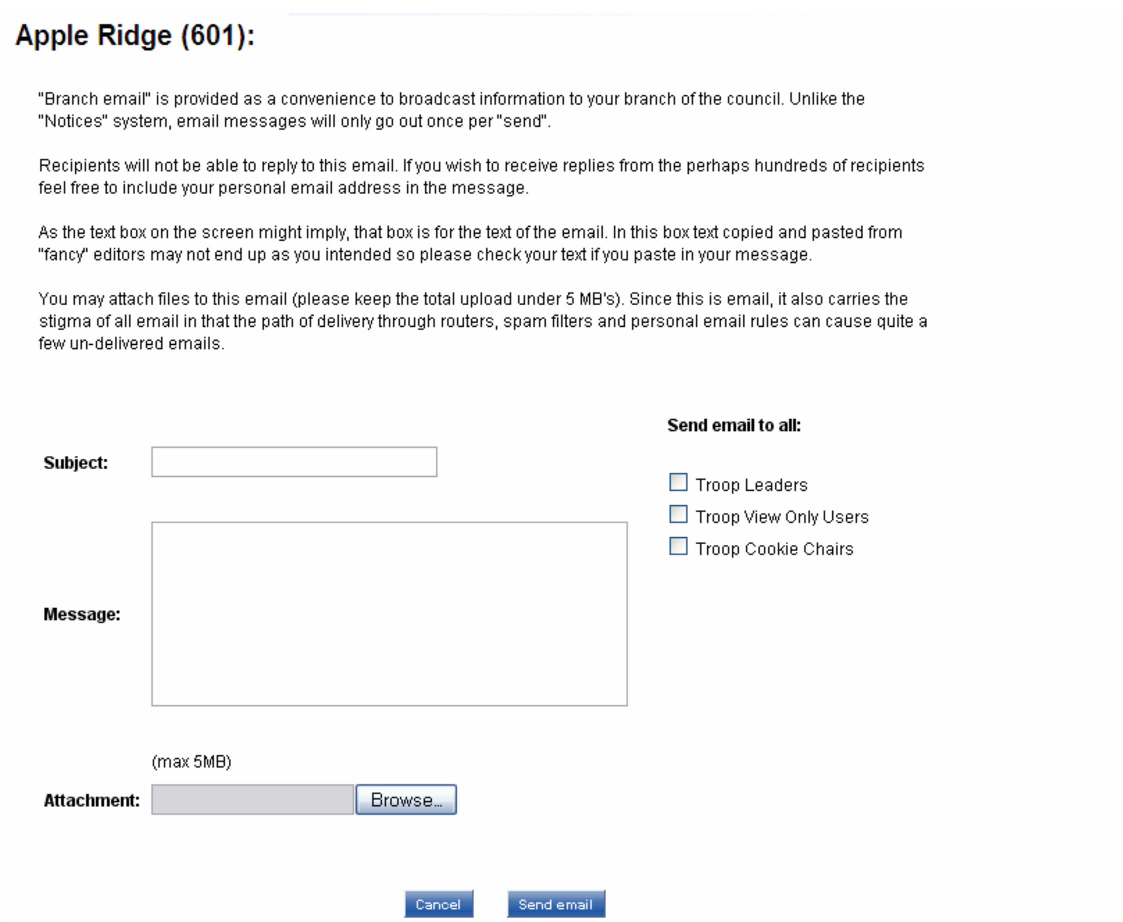

## Per Girl Average: Goal and Current



## *Contacts Tab*

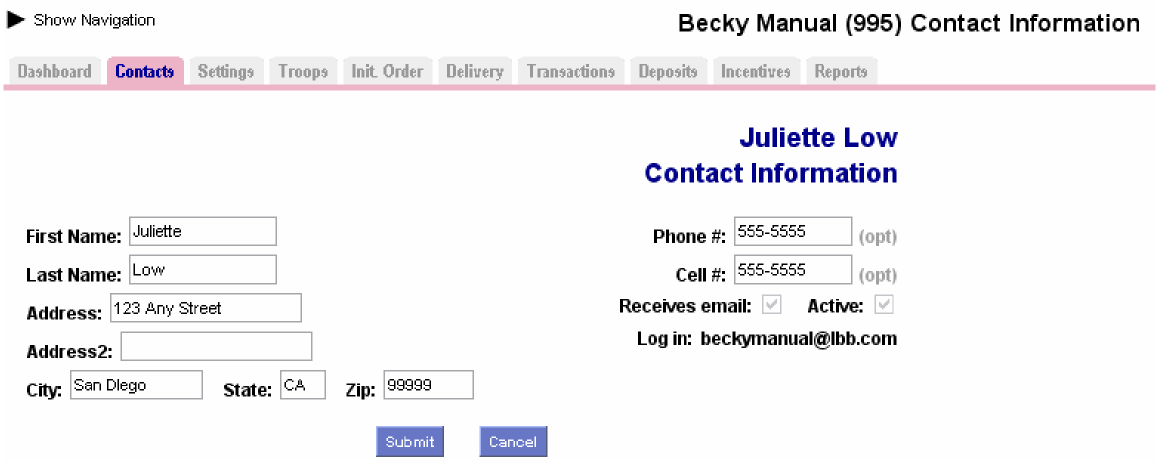
The information supplied on this screen was enter by you or set up by your council. To add or remove a contact you will need to select the **Settings** tab.


To email your troops, click the **email Branch** button. The system will display a screen with instructions and email limitations. Emails that you send through eBUDDE will be sent to you troop contact's regular email box. There is no replying of email in eBUDDE. You can send one or more attachments with your email as long as the total size does not exceed 5 MB.



To edit a **Service Unit Contact** click the **Edit** button below to the contact name.

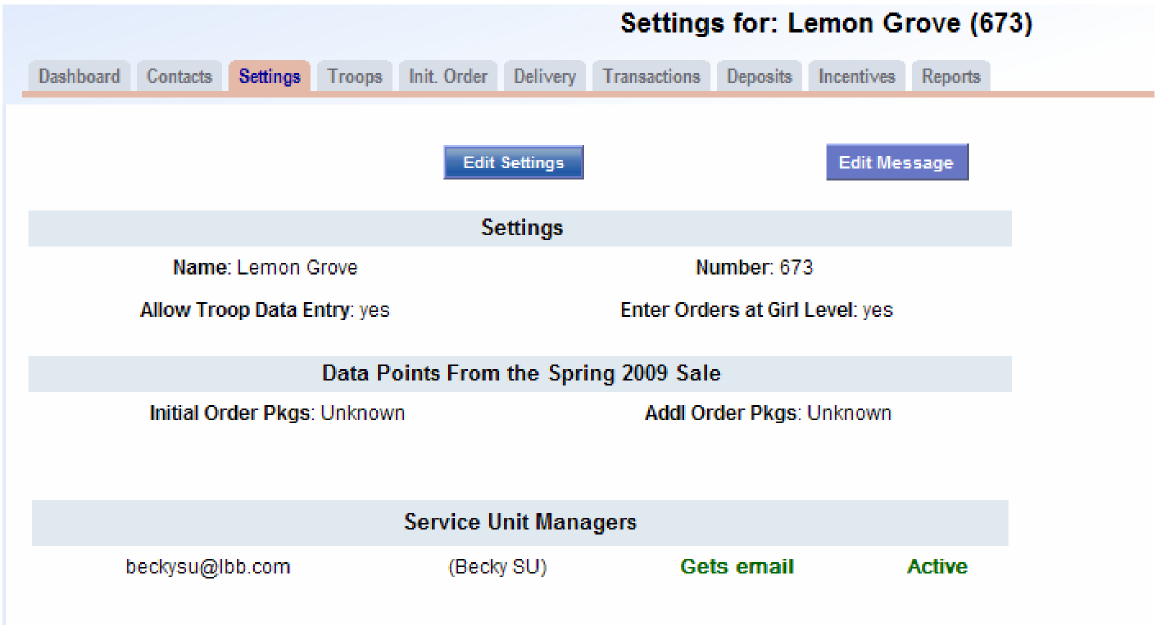
The system will open up a page to change the information. To create a new council contact, see the section on service unit settings.




Change the information by clicking in the box and keying in the new information. Click the **Submit** button to save the changes. If you wish to cancel the information keyed, click the **Cancel** button.

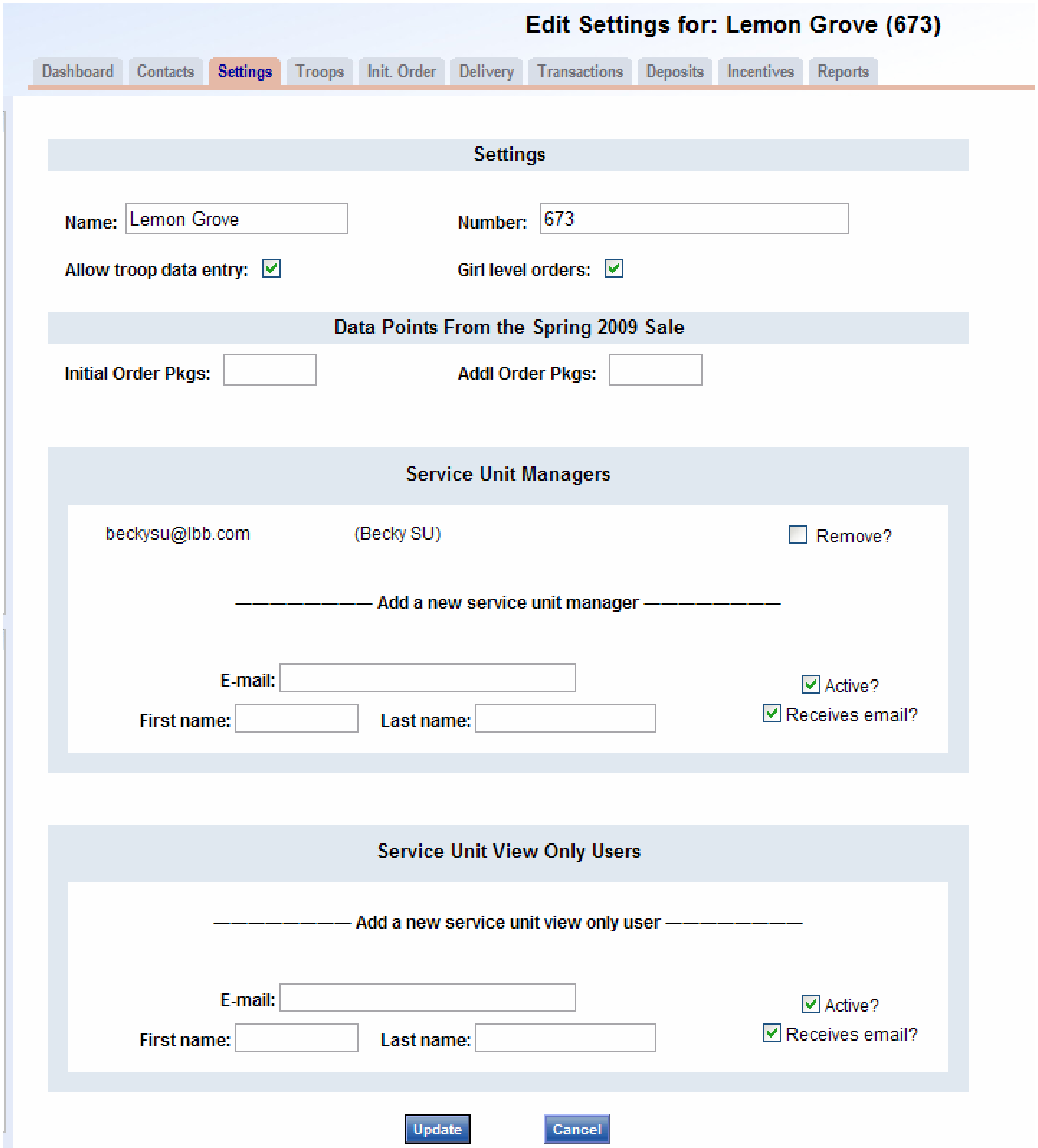
## *Settings Tab*

The settings tab allows for adding new service unit level users, changing default service unit settings, creating eBUDDE messages for troops on the dashboard, entering last year's data for the dashboard comparison graph.




This information was set by your council but you can make some changes appropriate to your service unit. You can changes the settings for allowing troop data entry and girl entry level data entry and your previous year's sales data. You can also add additional contacts for your service unit. In addition, you can create a message that troops will see when they log into eBUDDE.

To Update this information, left-click the **Edit Settings** button. The system will display the following screen:




**Name of Service Unit** – The service unit name

**Service Unit Number** – The service unit number

**Allow Troop Data Entry** – check this box if the troop is going to enter their orders in cases with booth information.

**Enter Orders at Girl Level** – Check this box if you or the troop is going to enter the order by girls in packages

**Data Points from the Previous YearSales**

**Initial Order Pkgs** – Enter in the number of packages that were ordered last year at initial order time by the service unit and/or troops.
**Addl Order Pkgs** – Enter in the number of packages that were picked up after the initial order was received by the service unit and/or troops.

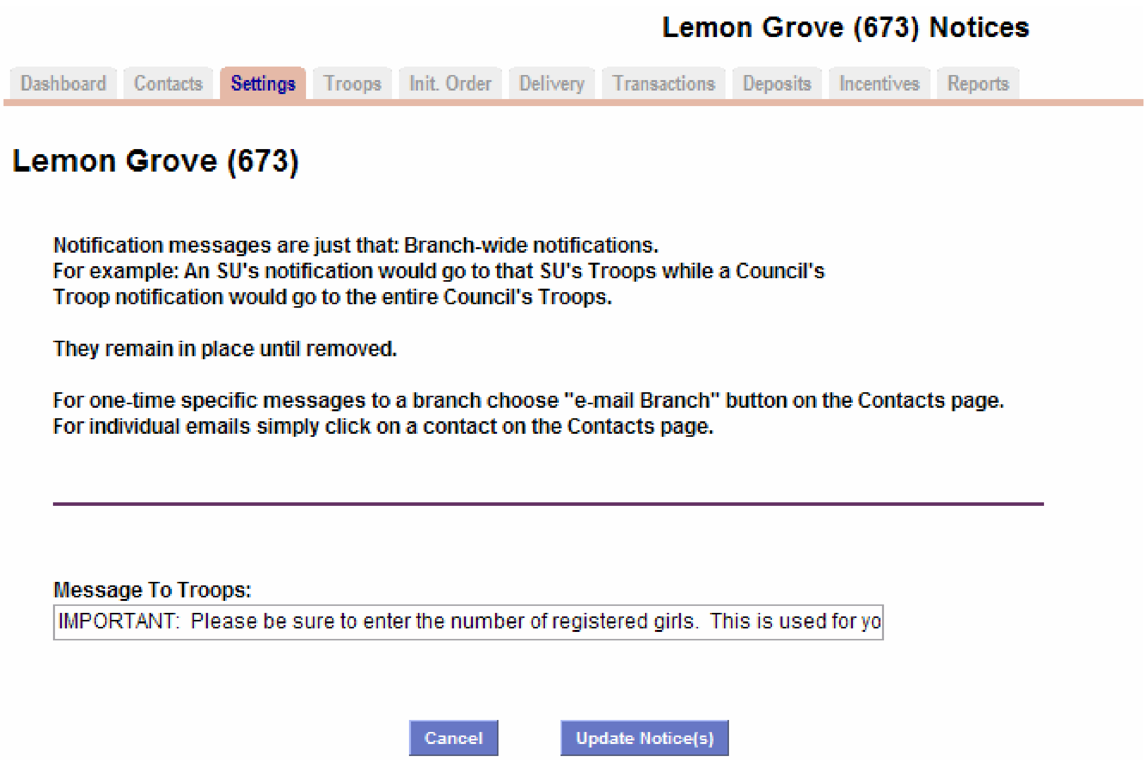
**Service Unit Managers** – this can be used to add another service unit contact. You can specify if the user will be receiving appropriate emails and if the user will be able to access the system. **If your email address, name, physical address and/or phone numbers have changed** – see the instructions on page 6.

**Service Unit View Only Users** – this can be used to add another contact to the service unit that can only see the screens and print reports. This user cannot make any changes in the system.

**Remove a contact** – You may remove service unit contacts. **NOTE: Do not remove yourself from the current list of service unit managers ONLY. If you do, you will no longer have access to the system.**

Left-click the **Update** button to save the changes. Left-click the **Cancel** button to leave the page without saving the changes.

You can also create messages for troops to see on their dashboard when they log in. Click the **Edit Messages** button to create the message.




Enter your message to the troops. Click **Update Notice(s)** to activate the message. Click **Cancel** to cancel any changes you made to this screen.

**NOTE:** If you do not want a message to be displayed, you can delete the contents of the message and click update notices and a blank message will show on the troop's dashboard.

## *Troops Tab*

To add and/or edit a troop, click the Troops tab on the page. As you add troops, you will see them appear on the left-side of the screen under the **Navigation** tree.


You can enter troops using two different methods.  The choice for which button you used is at your discretion.

**Add a Troop** – This button allows you to enter one troop only.  You would need to click this button for each troop you entered.

**Add up to 11 Troops** -  This button allows you to enter up to 11 troops at a time.  If you had 13 troops you would need to click this button twice.  The first time you would enter the 11 troops.  The second time you would enter 2 troops.

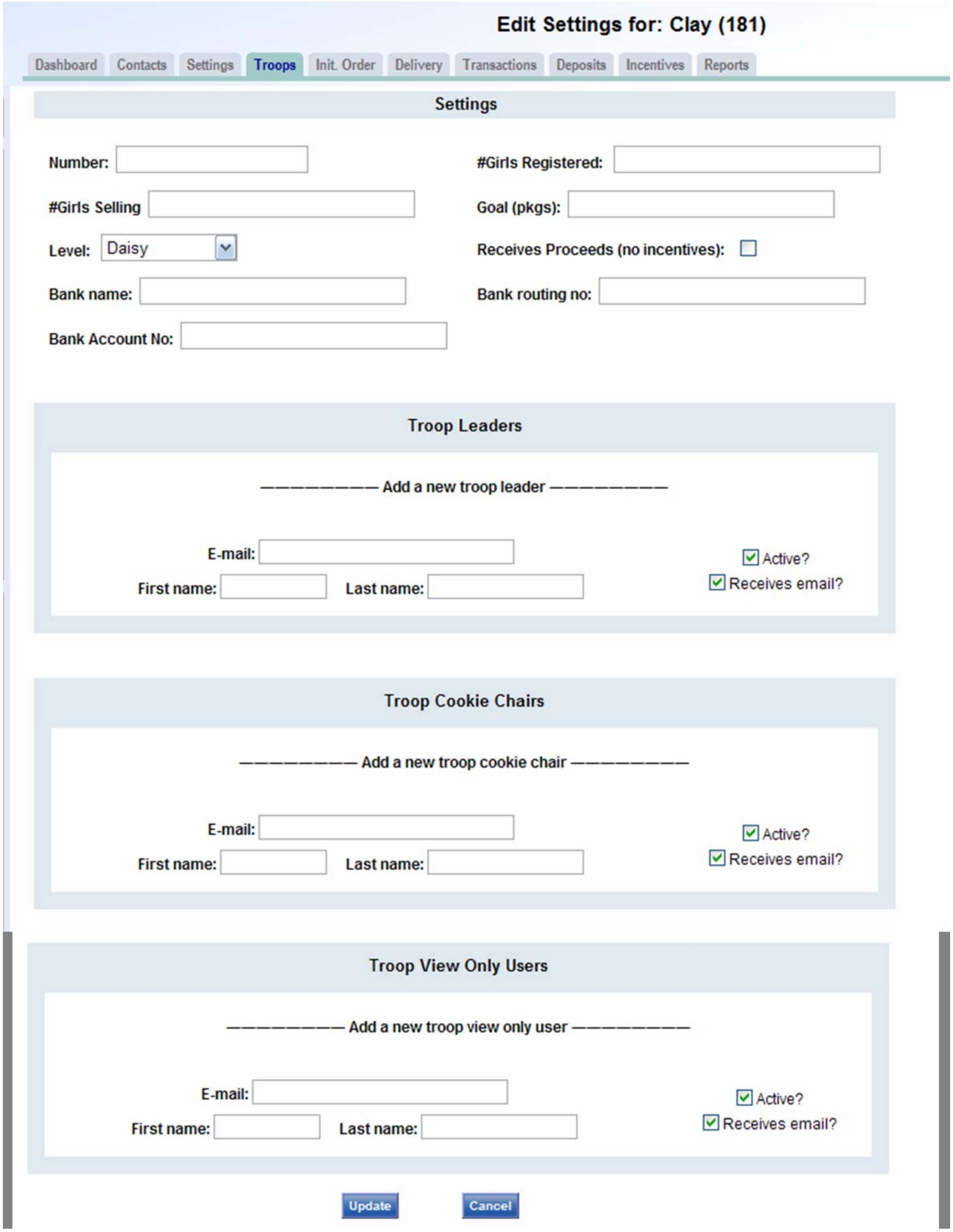
**To Add a Troop** – Left-click the **Add a Troop** button displayed on the page.  The following page will be displayed on the page.

**Unsubmit All Cookie Orders** – This will unsubmit all troop cookie orders if necessary to allow troops to resubmit

**Unsubmit all Initial and Final Incentive Orders**  - This will unsubmit all troop incentive orders if necessary to allow troops to resubmit.

**NOTE:**  You can unsubmit orders for individual troops if necessary

## Adding or Editing a Troop




**Number** – enter the troop number
**# Girls Registered** – the number of girls registered in the troop or 0 if unknown
**# Girls Selling** – the number of girls selling cookies in the troop or 0 if unknown
**Goal (pkgs):** - if the troop set a sales goal, enter the number in packages or 0 if unknown.
**Level:** - Program Age Level of the troop

**Receives Proceeds (no incentives):** - If this troop has the option of not receiving incentive incentives and receiving additional monetary funds, click in this box.
**Bank Name (optional)** – Enter the troop's bank account name
**Bank Routing No. (optional)** – Enter the troop's bank routing number
**Bank Acct No. (optional)** – Enter the troop's bank account number
**Troop Leader or Troop Cookie Chair or Troop View Only Users:**

– You **MUST** enter an email address for one of the three types of users.
**Email:** - Enter email address
**First name:** (Optional) – Enter in contact's first name
**Last name:** (Optional) – Enter in contact's last name
**Active?** – Check this box if you want the contact to have access to the system.
**Receives email?** – Check this box if you want the contact to receive email from you and/or council and the confirmation emails when ordering.

**Below are examples of entering contact information:**

- **Option 1:** The troop will be entering troop information and orders. You want them to receive the emails that eBUDDE sends confirmation cookie and incentive orders and you want them to have access to the system.

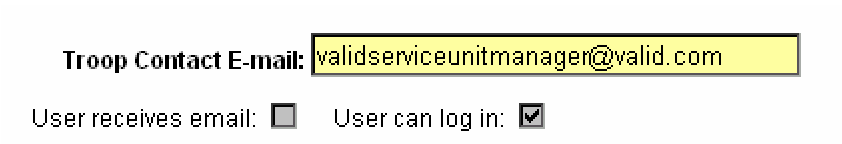

- **Option 2:** The troop will be entering troop information and orders. You **DO NOT** want them to receive the emails that eBUDDE sends for confirmation on cookie and incentive orders and you want them to have access to the system.


- **Option 3:** You want the troop email address in the eBUDDE system but **DO NOT** want them to receive the emails the EBUDDE sends for confirmation on cookie and incentives orders and you **DO NOT** want them to have access.

- **Option 4:** You as the service unit want all information directed to you. You want to receive the emails and you want to have access to the system.

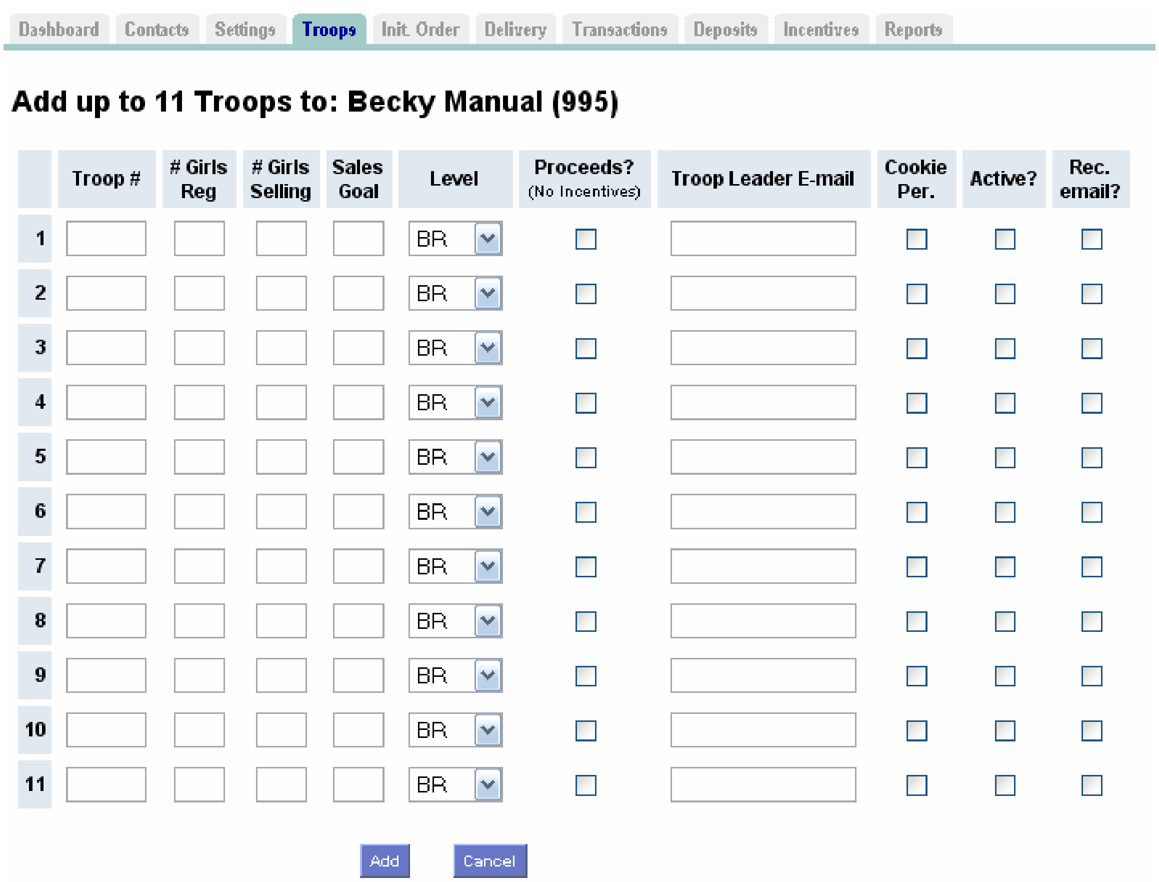


- **Option 5:** You as the service unit will enter the information but do not want the order confirmation emails sent to you.




If the contact is the troop cookie person, click the **Cookie Person** box. Left-click **Add** to add the troop. Left-click **Cancel** to leave the page without adding the troop.

**To Add up to 11 Troops –** Left click the **Add up to 11 Troops** button. The following page will be displayed:




**Troop Number** – enter the troop number (numerical data only)
**# Girls Registered** – the number of girls registered in the troop

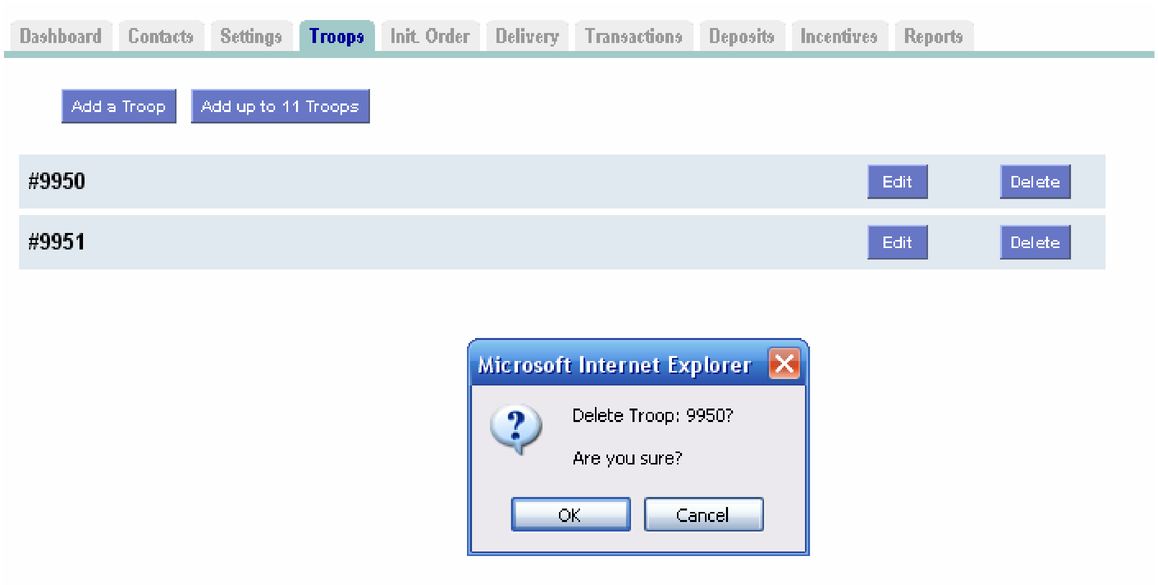
\# **Girls Selling** – the number of girls selling cookies in the troop
**Has Sales Goal:** - if the troop set a sales goal, enter the goal in packages
**Level:** - Program Age Level of the troop
**Proceeds (no incentives):** - If this troop has the option of not receiving incentive incentives and receiving additional monetary funds, click in this box.
**Troop Contact E-mail:** – You **MUST** enter an email address here.
**Cookie Per.** – Click the box if the contact email is for the troop cookie person.
**Active -** If this troop contact will be a user on the system, this box must be checked
**Rec Email –** If you want the troop contact email user to received the email confirmations, this box must be checked

Left-click **Add** to add the troop. Left-click **Cancel** to leave the page without adding the troop.

As you add troops, the system will update the navigation tree.  You will also be allowed to change and/or delete troop information.


To change troop information or remove a troop, click on the **Troops** tab.  The system will list the troops currently in the system.

**Edit** – The edit button allows you to change information about the troop and add new troop contacts.
**Delete** – The delete button allows you to remove the troop from the system.



Left-click the Delete button.  The eBUDDE system will confirm that you want to delete the troop.  Left-click the **OK** button to delete the troop.  Left-click the **Cancel** button if you do not wish to delete the troop.

## *Init. Order*

Format of the screen may be in **Cases** or **Packages** as directed by your council. One or more of the following options may apply for the **initial cookie order**:

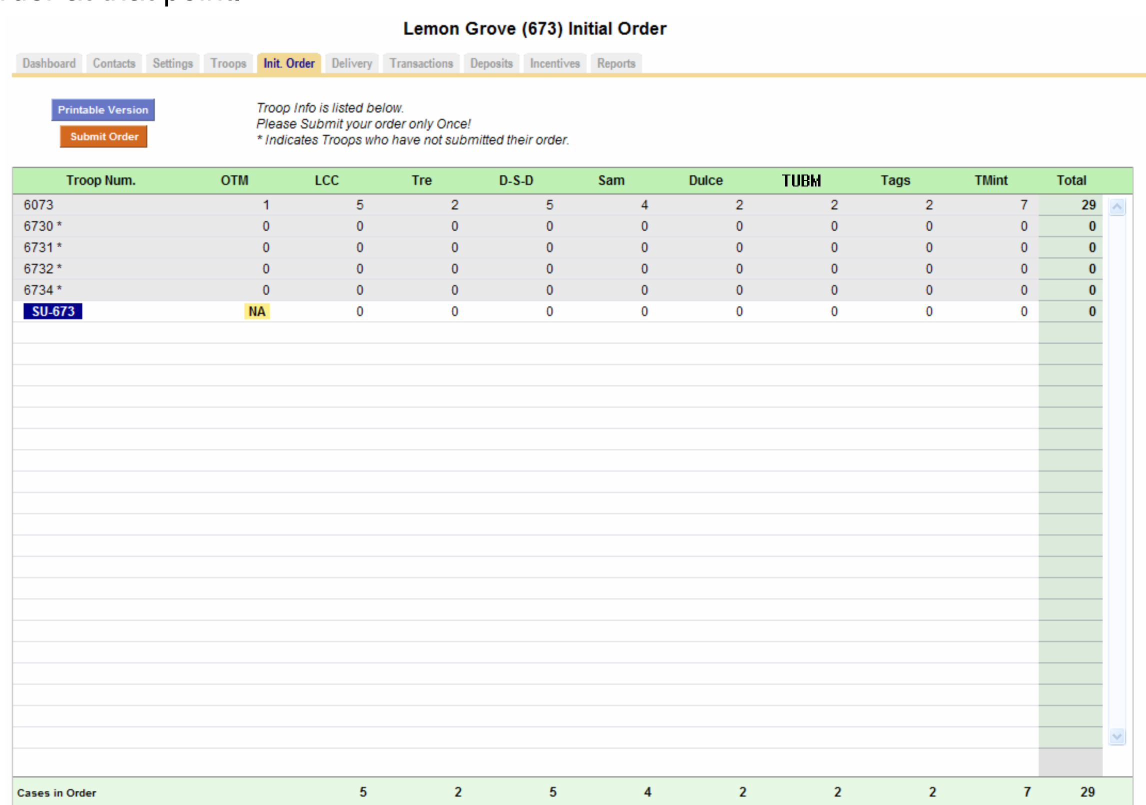
- Verify troop orders
- Enter troop orders using the fast entry option
- Enter service unit order
- Submit service unit/troop orders to council

**NOTE: If you will be entering troop cookie orders using the troop cookies tab, see Appendix A.**

### Initial Order Page- Troops placing orders

**Instructions for service units once orders have been placed for troops by troops or the service unit at the troop level**

All orders need to be reviewed by the service unit. The service unit can monitor this entry easily by looking at the initial order page. This page is where you verify the cookie orders by troops, add a service unit order and then submit your service unit orders to the council. Once you have submitted your initial cookie order you cannot change the order. **ONLY** council will be able to change the order at that point.




| Troop Num. | OTM | LCC | Tre | D-S-D | Sam | Dulce | TUBM | Tags | TMint | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 6073 | 1 | 5 | 2 | 5 | 4 | 2 | 2 | 2 | 7 | 29 |
| 6730 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6731 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6732 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6734 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| SU-673 | NA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Cases in Order | | 5 | 2 | 5 | 4 | 2 | 2 | 2 | 7 | 29 |

**Printable Version** – Left-click this button to print a report that shows the above information.

**Submit Order** – Left-click this button to submit your service unit order to your council. **NOTE: You can only submit your order ONCE! If a change needs to be made, you will need to call council to make the change to an order.**

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 1251 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | **8** |
| 6000 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| 6073 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| SU-673 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |

The system will display the status of troop orders. In the example above troop 1251 has submitted its order. Troops 6000 and 6073 have not submitted their orders as designated by the ***** (asterisk).

If your council designates your role to key in a service unit order, you would key that information here. **NOTE: This service unit order must be keyed in immediately before submitting your order to council.** To key that information you will do the following:

1. Left-click on your row labeled by the letters SU and your service unit number.
2. Left-click on the row at the bottom of the page right above the total row. This row will highlight.
3. Enter the quantities for your order. You move through the columns using the tab key. After you have completed all the varieties, press the enter key to enter the order.

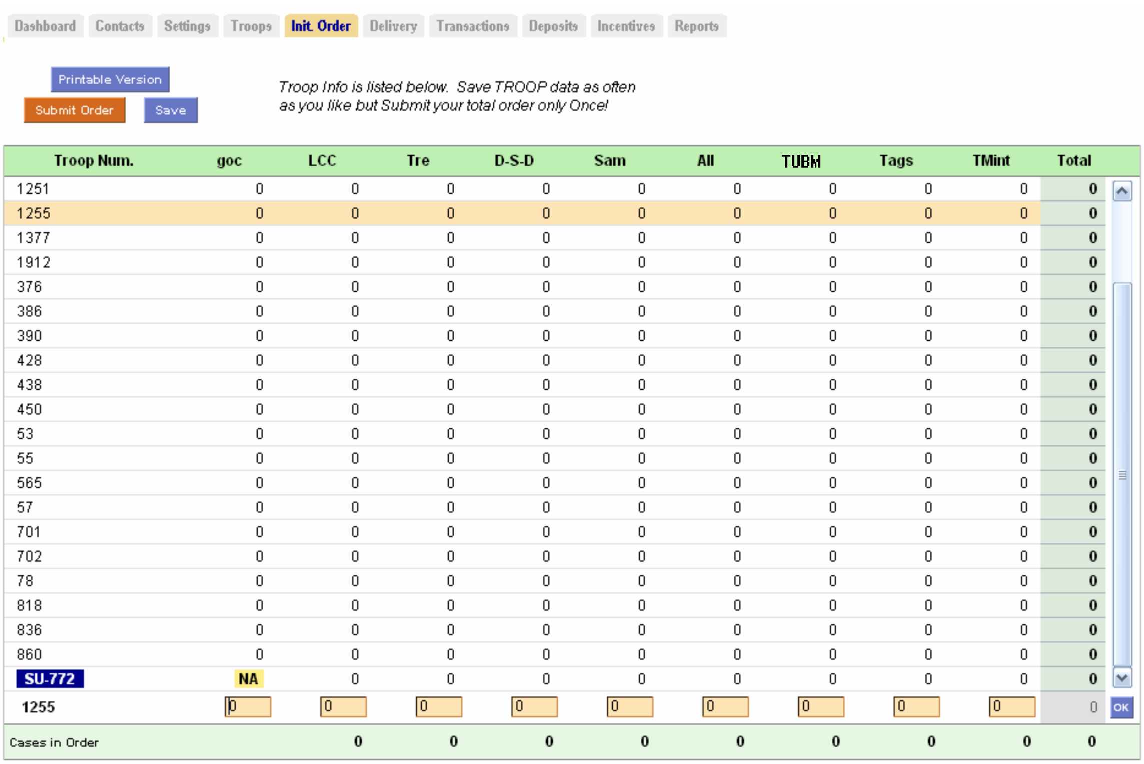
The example below show how the page will look for entering a service unit order for service unit 995.

| Troop Num. | GOC | LCC | Tre | D-S-D | Sam | Dulce | TUBH | Tags | TMint | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 9950 | 0 | 6 | 4 | 6 | 11 | 6 | 6 | 11 | 11 | **61** |
| 9951 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| 9952 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| 9953 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| 9954 | 0 | 10 | 10 | 10 | 15 | 15 | 10 | 10 | 20 | **100** |
| SU-995 | **NA** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 OK |
| Cases in Order | | **16** | **14** | **16** | **26** | **21** | **16** | **21** | **31** | **161** |

## Initial Order Page – Service Unit keying total troop order

**Instructions for service units keying in troop orders in total cases using the fast entry method.**

All orders need to be reviewed by the service unit. The service unit can monitor this entry easily by looking at the initial order page. This page is where you enter the cookie orders by troops, add a service unit order and then submit your service unit orders to the council. Once you have submitted your initial cookie order you cannot change the order. **ONLY** council will be able to change the order at that point.




| Troop Num. | goc | LCC | Tre | D-S-D | Sam | All | TUBM | Tags | TMint | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 1251 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1255 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1377 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1912 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 376 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 386 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 390 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 428 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 438 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 450 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 53 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 55 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 565 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 57 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 701 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 702 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 78 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 818 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 836 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 860 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| SU-772 | NA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1255 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 OK |
| Cases in Order | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

**Printable Version** – Left-click this button to print a report that shows the above information.

**Submit Order** – Left-click this button to submit your service unit order to your council. **NOTE: You can only submit your order ONCE! If a change needs to be made, you will need to call council to make the change to an order.**

**Save** – Save your entries of troop orders.

To enter in troop orders you click on the line with the troop number you will be entering an order for. Click on the first entry box at the bottom of the screen. Enter in the cookie order by tabbing through the line. Once you have completed entering the order, click the enter button. The system will display the troop order next to the troop number.

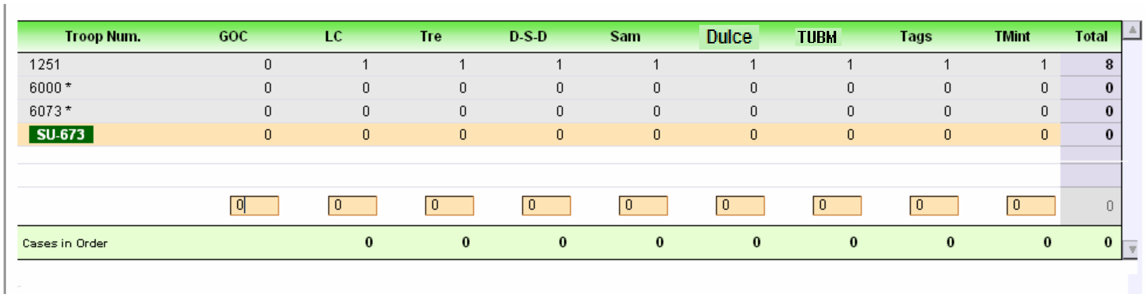
The system will display the status of troop orders. If an order for a troop has not been placed the troop number will be preceded by an * (asterisk).

## Initial Order Page – Service Unit keying service unit order

If your council designates your role to key in a service unit order, you would key that information here. **NOTE: This service unit order must be keyed in immediately before submitting your order to council.** To key that information you will do the following:

1. Left-click on your row labeled by the letters SU and your service unit number.
2. Left-click on the row at the bottom of the page right above the total row. This row will highlight.
3. Enter the quantities for your order. You move through the columns using the tab key. After you have completed all the varieties, press the enter key to enter the order.

The example below show how the page will look for entering a service unit order for service unit 673.

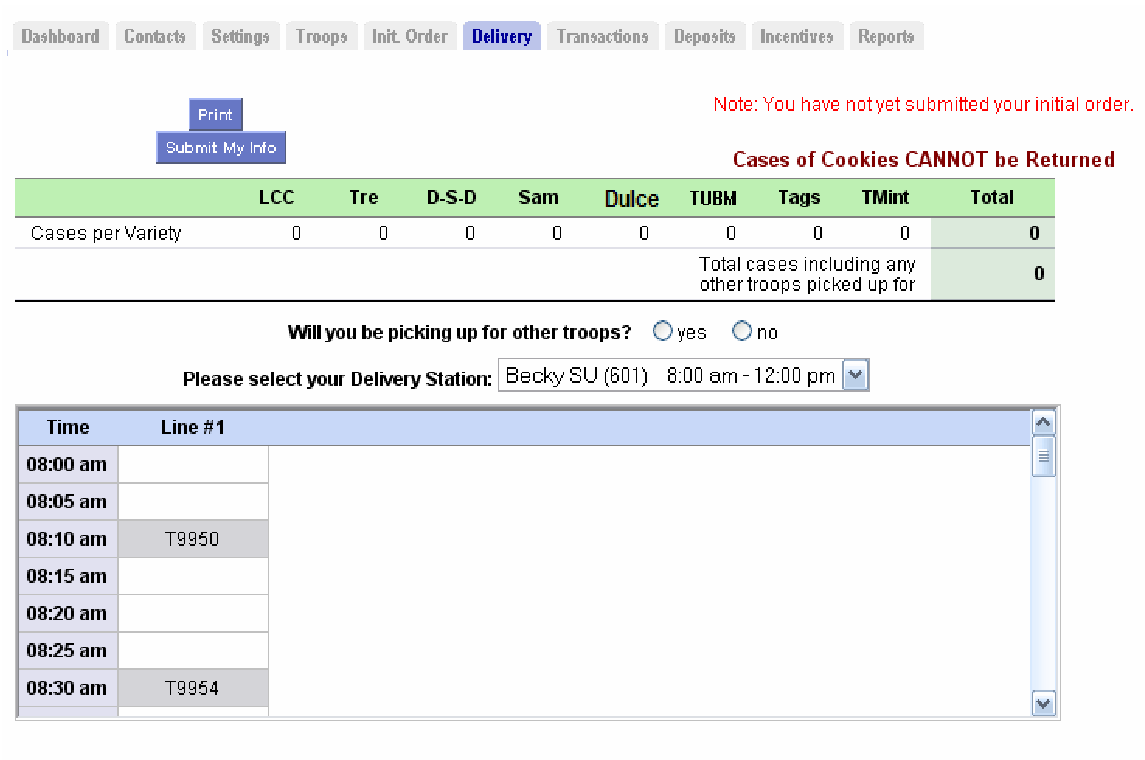


| Troop Num. | GOC | LC | Tre | D-S-D | Sam | Dulce | TUBM | Tags | TMint | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 1251 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 8 |
| 6000 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6073 * | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| SU-673 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Cases in Order | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

## *Delivery Tab*

If a service unit has a cookie order, they would need to select a time for their cookie pickup and possibly a delivery site. This is done on the delivery tab.

Left-click the **Delivery** tab. The system will display the following page.




**Will you be picking up for other troops?** – If you pick up for other troop, click in the yes radial. The system will display boxes to enter the troop number(s) for the troop(s) you are picking up for. If you are not, click in the no radial.

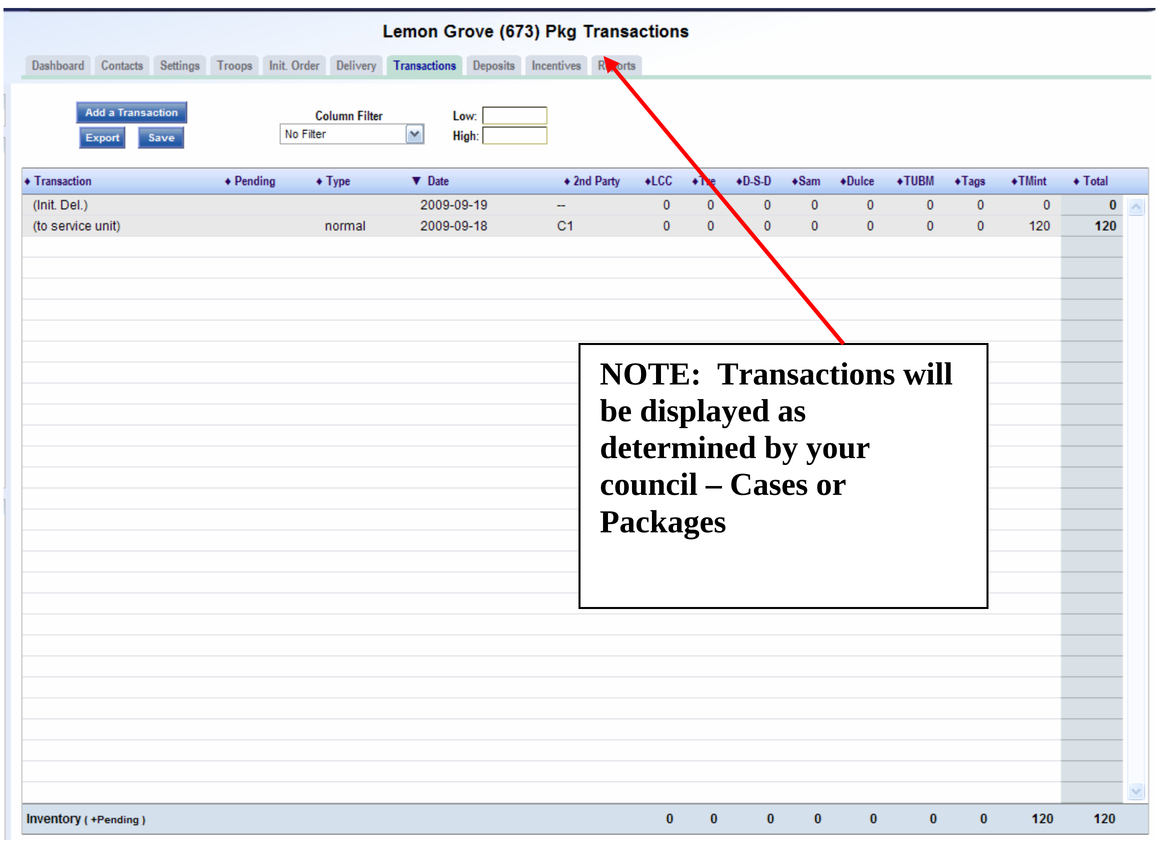
Select your delivery station.

Click the time slot that you want.

Click the **Submit My Info** button.

## *Transactions Tab*

This area is used if the service unit needs to record transactions for cookies from the service unit to the troops. You can then view your current inventory status displayed on the page. Transactions originating at the cupboard may be done by designated council staff or you may be authorized to do them. You will use this form at the service unit level only if you have cookies you distribute yourself.




Left-click the **Printable Version** button to print a hard copy of your transactions.

Left-click the **Export** button to export to an Excel compatible format.

Left-click the **Save** button to save the information you have keyed on the page.

## Navigating the Transaction Form


## Navigating the Transaction Form

The columns on this page listed from left to right are as follows:

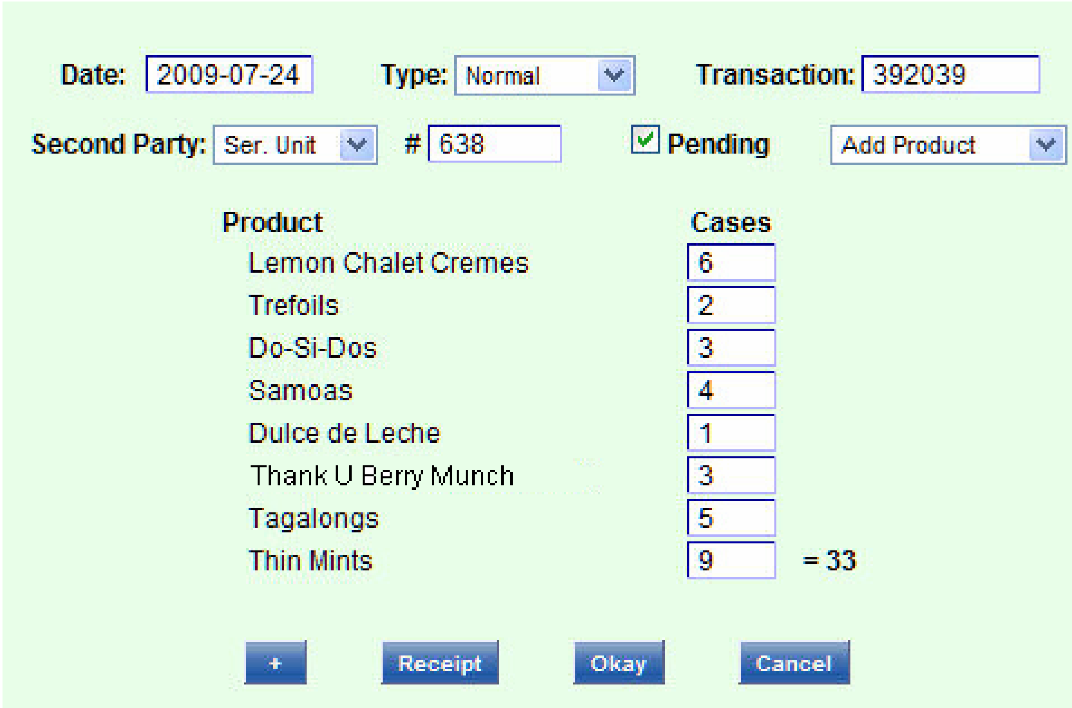
**Transaction** - This the receipt code of the transaction
**Pending** – The status of the order as pending to the cupboard, yes or no
**Type** – A reference for your council
**Date** – This is the date of the transaction
**2nd Party** – This is whom the cookies are going to or coming from
**LCC**– Lemon Chalet Creme
**Tre** – Trefoils
**DSD** – Do-Si-Dos
**Sam** – Samoas
**Dulcel** – Dulce de Leche
**TUBM** - Thank You Berry Munch
**Tag** – Tagalongs
**TM** – Thin Mints
**Total** – Total of all varieties

You will notice that there is a sign before each of the column headers. This allows you to sort the records in whatever order you prefer. The system default is by date. Clicking on the sign will activate, deactivate or change the sort type
▼ Sort from smaller or earliest to larger or latest
▲ Sort from larger or latest to smaller or earliest
► Not sorted by this column

**Column Filter** – The column filter allows you to search and selectively display by any of the columns available. The default is **No Filter**. This will display all transactions. You use the drop down box to select your search/display column. In the **Low and High** boxes you enter the range that you want to see displayed on the page. Tab through the boxes and hit tab after entering the information in the High box.

## Create a product transaction

To create an inventory transaction, left-click the **Add a Transaction** button. The system will display a product transaction form.




**Transaction Date** – enter the date of the transaction. The system will default to the current date.

**Type** – Select type of transaction.

Normal – Transaction with no specific designation

Booth – Transaction is for a booth sale

Adjustment – Transaction type for corrections **(This option available at council discretion)**

Return – Transaction for return of cookies **(This option available at council discretion)**

**Transaction**: - this is a fifteen character alphanumeric field that you may use for reference to the transaction. **NOTE: This box cannot be left blank. However, if you are going to print a receipt this box will automatically be filled with the receipt number from the form that you will be printing.**

**Second Party:** - this refers to the other party that is getting the cookies, bringing back the cookies, etc. Is the transaction you wish to enter with a cupboard, another service unit or a troop? You would select it by clicking the drop down or typing in the first letter. You then enter the number of the second party – troop number, service unit number, cupboard number.

**Pending:** (Optional) You will check this box if you are creating a pending order request to a cupboard.

**Drop down:** You have two options. Remove Product or Add Product - If cookies are being added to your cupboard, click Add Product. If cookies are being removed from your cupboard, click Remove product.

Enter the quantities of product in either cases, packages or both.  The system will total the information for you so you can verify accuracy.

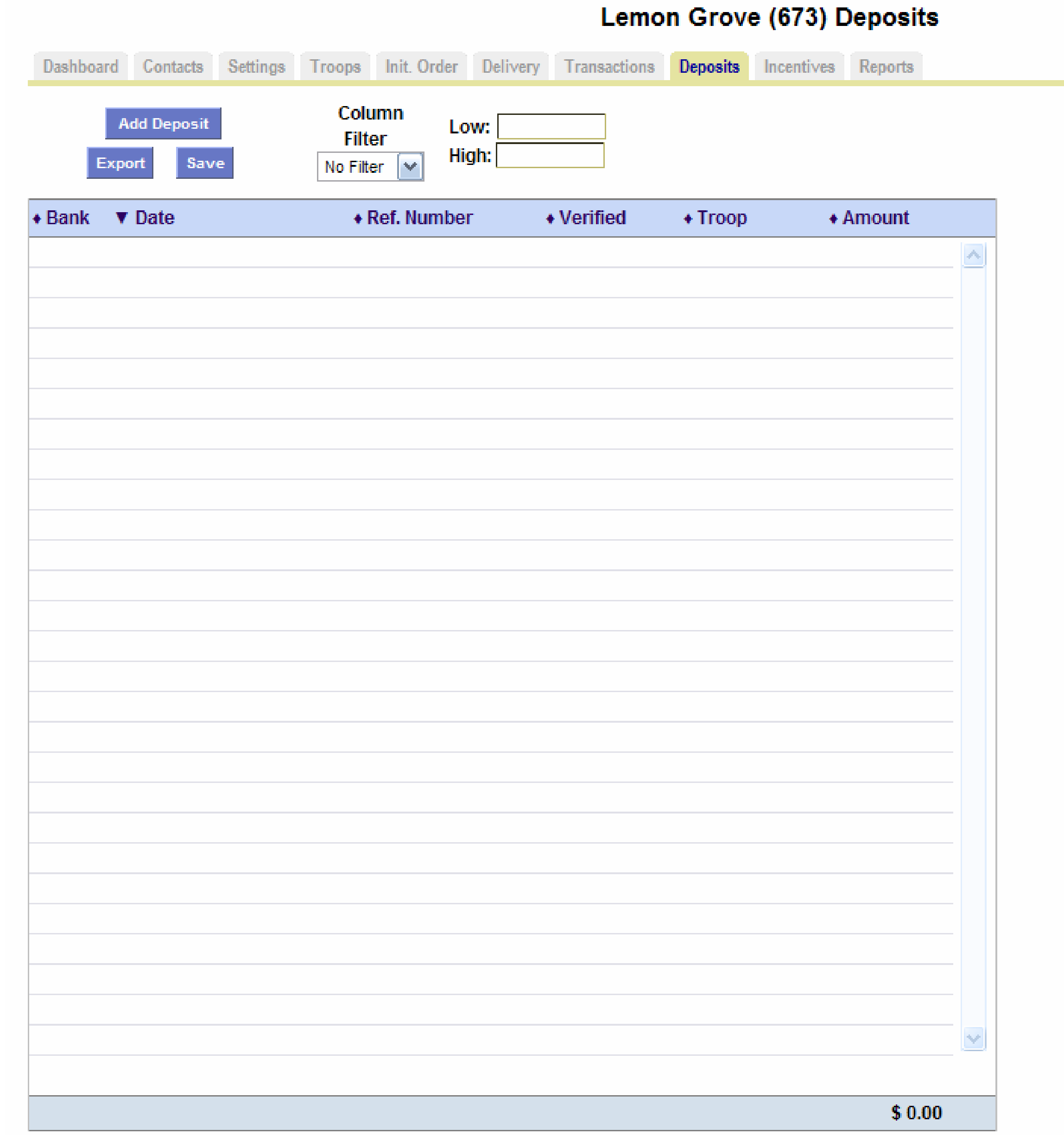
 The add more button allows you to create multiple transactions by going to a entry form immediately.  Click or press the spacebar on this button to activate.

Left-click **Okay** to save the transaction.  Left-click **Cancel** to leave the form without saving.

You then must click **Save** to save the transaction(s) entered.  The system will warn you if you do not save the worksheet as your data will not be saved.

## *Deposits Tab*

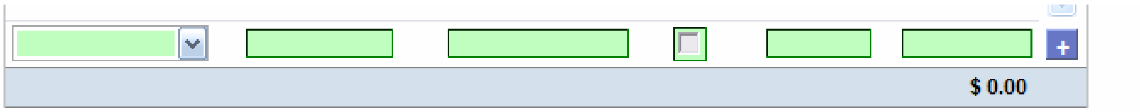
The deposits tab will allow you to view all the deposits credited to your troops. If your council allows, you can also enter the deposits that your troops have made to the council.



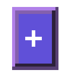

As you enter deposits they will be displayed on the screen. You can **Add, Edit, or Delete** deposits. You can also selectively search to display only specific deposits.

### Adding Deposits

Click the **Add Deposit** button.




Select the bank, enter date, reference number (optional), verified (unavailable for service units ) troop number and amount.  Use the **Tab** key to move across the page.  Press Enter to complete the line entry OR use the **Add More** button to key additional deposits.

**Add More** -  The "add more" button allows you to enter in additional rows on deposits, additional cookie transactions, adding girls on the initial order.  You can activate this button by pressing the spacebar or clicking on it. 

**Date** – You must enter the date in this format mm/dd/yy.  Each deposit must have a date.

**Reference Number** – Reference is used to annotate the deposit.  This entry is optional.  Possible uses for this box is to comment on the deposit, to specify which bank the deposit was made from, to enter a encoding number.

**Troop** – Enter troop number

**Verified** – Unavailable to service units and troops.  Verification can be done by councils only/

**Amount** – the amount can be a positive or a negative.  You do not have to enter in the cents if it does not apply.

## Navigating the Deposit Information Page

As you enter deposits, the system displays the deposits using a scrolling feature. To facilitate making changes there are several methods to navigate to the information that you need. You will want to use the method that best fits what editing you are trying to do.

Scrolling

Deposits are displayed n the order keyed by default. You can scroll through the deposit pages by using the scroll bar located to the right of the deposit page.

Sorting

You can sort the deposits in any order that will be show you the deposits in that particular order.

▼ Sort from smaller or earliest to larger or latest
▲ Sort from larger or latest to smaller or earliest
► Not sorted by this column

Search and Filter

Column Filter – The column filter allows you to search and selectively display by any of the columns available. The default is **No Filter**. This will display all transactions. You use the drop down box to select your search/display column. In the **Low and High** boxes you enter the range that you want to see displayed on the page.

## Editing/Deleting Deposits

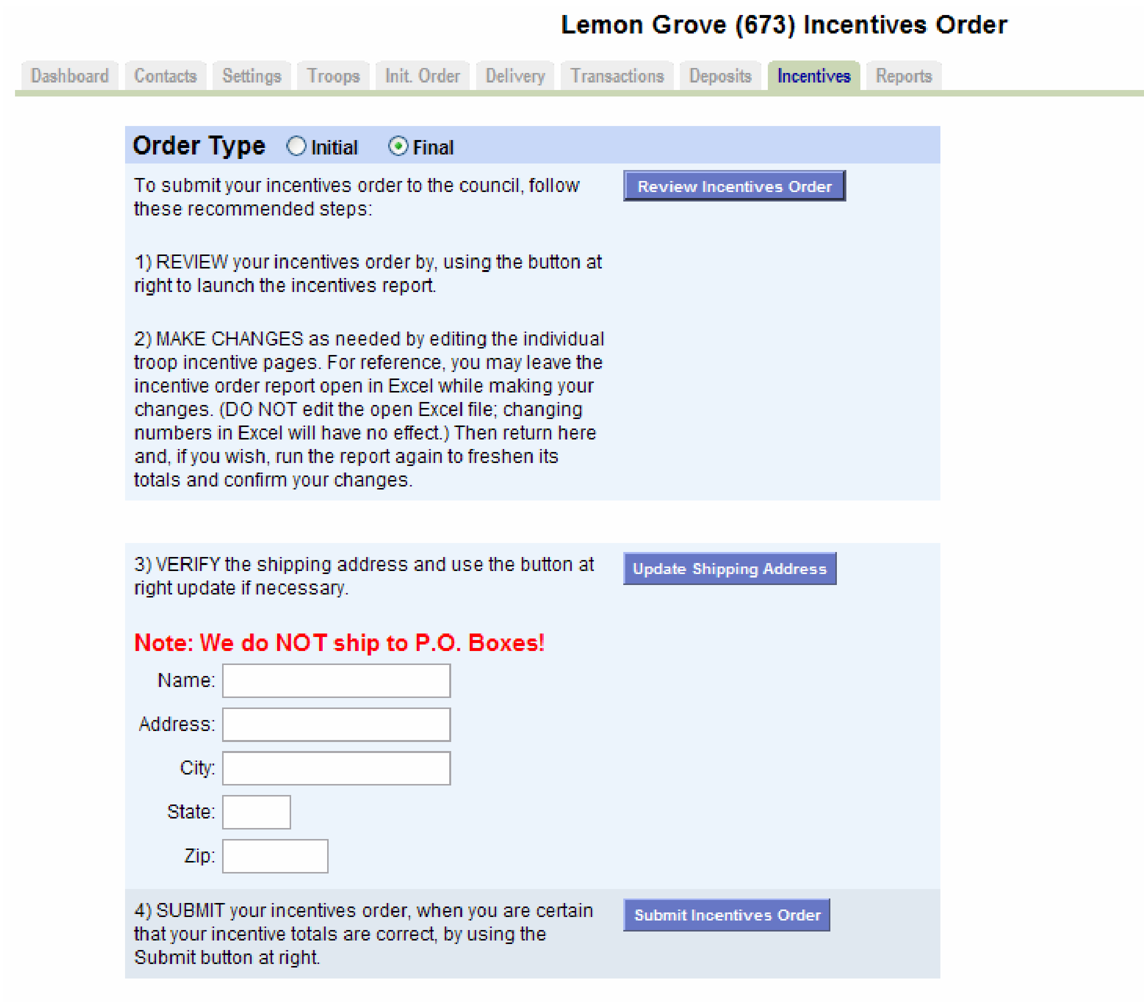
All boxes can be changed To make changes by left-clicking your mouse in the box you want to correct and making the changes. You can also delete the deposit by pressing the **Delete** key on your keyboard. Deletions and changes can be made at the same time. Once you have made all your changes, left-click the **Save** button to save your changes.

## Exporting the Deposits

Click the **Export** button to export the deposits. The system will display a screen and instruction you to click File, Save As to save the deposits.

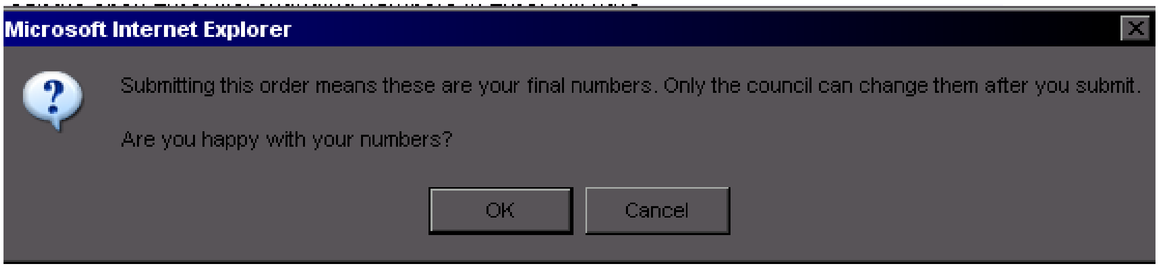
## *Incentives Tab*

Incentive orders are entered at the girl or troop level. The service unit role is to monitor the entry of incentive orders and submit the order to the council. Your council may or may not designate that your council will have an initial order.




**Order Type** – Initial order type is an option that may or may not be available as it is a council option. If you have both types, you may select which type you will be verifying and submitting to council.
**Review Incentives Order** – This will create a report for the incentives that have been entered into the system. This report can be saved and printed. You **MUST** verify the accuracy of this report before proceeding. If you need to make changes, **DO NOT** make them on the report. Go back to the troop incentive order form to make the changes
**Update Shipping Address** – This option may or may not be available. If available, the service unit must enter in the shipping contact name address. This information is used by the bakery warehouse to ship the items to the service unit.
**Submit Incentives Order** – Once all troop incentive orders have been verified, click the button. This will send your verified incentives order to council. The

system will verify that you want to submit your order. Once you have submitted your order, you will not be able to make any changes, only council will.



# Reports

This section will allow you to print reports for your service unit.  We currently have nine reports.  New reports will be added to the system.  Left-click **View Report** to open the report in a Microsoft Excel downloadable window.

The system will display a box to open the report or save it to your computer.  The format for both is a Microsoft Excel Worksheet


**Initial Order Report** – This report list all troop initial cookie orders by variety. The report can be printed in either cases or packages.
**Booth Sales Report** – This report lists all the troop initial orders that have ordered cookies for booth sales on the troop worksheet.  The report can be printed in either cases or packages.
**Troop Pickup Sheets** – These sheets can be printed one of two ways.  If you check the pre-printed form, it will print quantities of cookies for each troop that will need to be printed on a form supplied by your council.  If you do not check the box, the system will print the entire form in color (must have a color printer) for you.
**Blank Troop Pickup Sheet** – This will print a pickup sheet with no information on it.  You can use this report as a fill-in pickup sheet.

**Troop Incentives Summary** – This report allows you to print an incentive summary for either the initial incentive order or the final incentive order.

**Deposits** – This report will list all deposits for your service unit. It will give you the option for filtering what is on the report.

For all transactions, leave the boxes blank and left-click the **Run Report** button.

**Date** – To print using the date filter you need to enter a date in one or both boxes after the date label. You also need to format the date as mm/dd/yy. Left-click the **Run Report** button to print the records specified

> **Range of Dates** - enter in first box the starting date, enter in second box the ending date. This will be an inclusive range displaying all deposits between those two dates and including those two dates.
>
> **One Date –** enter the date in the first box and enter it again in the second box.
>
> This will display all the deposits for that day.
>
> **Starting Date to Last Date Keyed** – enter the starting date in the first box, leave the second box blank.
>
> **All Dates to a Specific Ending Date** – leave the first box blank, enter the ending Date in the second box.
>
> **Troop #** - To print using the troop number filter you need to enter a troop number in one or both boxes after the troop # label. Left-click the **Run Report** button to print the records specified
>
> **Range of Troops** - enter in first box the starting troop number, enter in second box the ending troop number. This will be an inclusive range displaying all deposits between those two troops and including those two troops.
>
> **One Troop –** enter the troop number in the first box and enter it again in the second box. This will display all the deposits for that troop.
>
> **Starting Troop to Last Troop Keyed** – enter the starting troop number in the first box, leave the second box blank.
>
> **All Troops to a Specific Ending Troop** – leave the first box blank, enter the ending troop number in the second box.
>
> **Date and Troop Number –** You can use the combinations listed above to specify deposits by date and/or by troop number.

**All Transactions** – This report will list all transactions that a service unit created moving cookies from the service unit to the troop or troop-to-troop transactions.

**Troop Proceeds Summary** - This report will detail by troop, the cookie initial orders, transfers, final orders, girls registered, girls selling, per girl averages, total sales, troop proceeds, deposits and balance dues. This report can be viewed in packages or cases by clicking the appropriate radial button.

You can also filter this report to show only troops who are due a refund or owe money by check the appropriate box. If no boxes are check, all troops will be displayed.

**Troop Sales Summary** – This report is very similar to the troop proceeds summary. It includes all the items from the troop proceeds summary but also breaks down the troop proceeds into categories if applicable. This report can be viewed in packages or cases by clicking the appropriate radial button.

You can also filter this report to show only troops who are due a refund or owe money by check the appropriate box. If no boxes are check, all troops will be displayed.

**Girl Goals** - This report compares girl cookies sold against the Cookie Club information

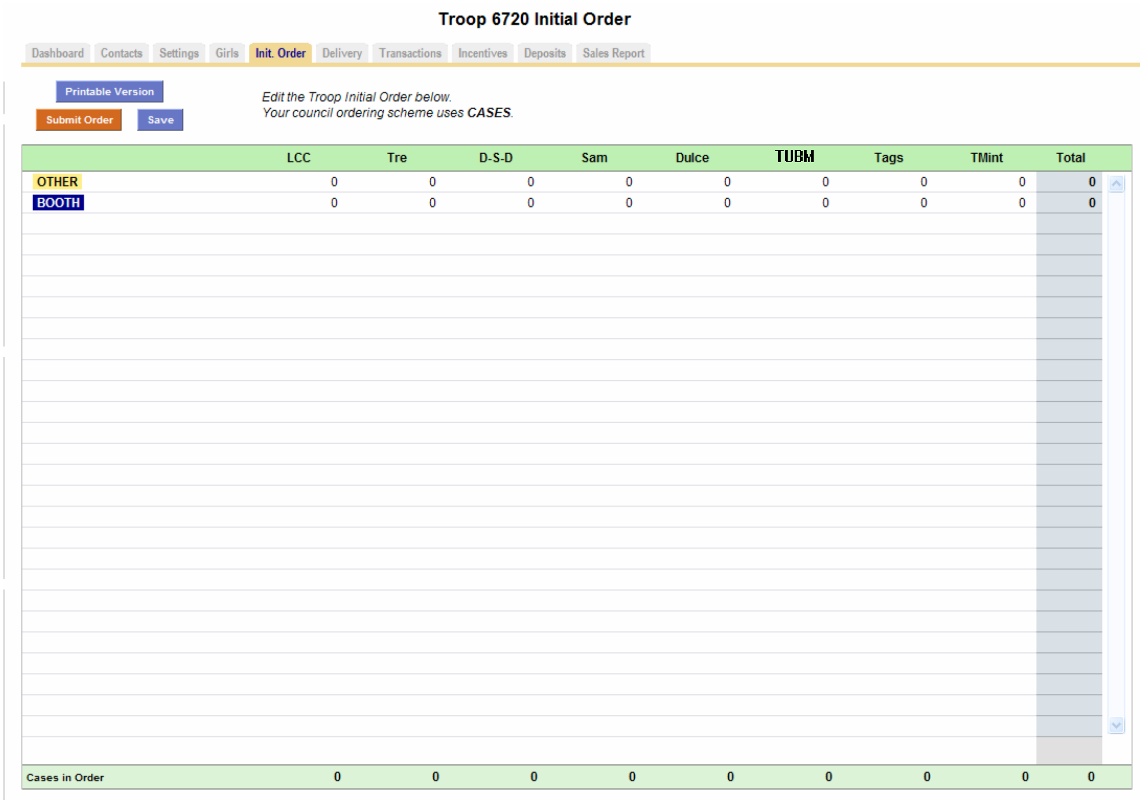
**Troop PGA** – This report shows troop per girl average for troops and compares for Cookie Club troops.

# Appendix A – Troop Cookie Ordering Methods on Troop Level

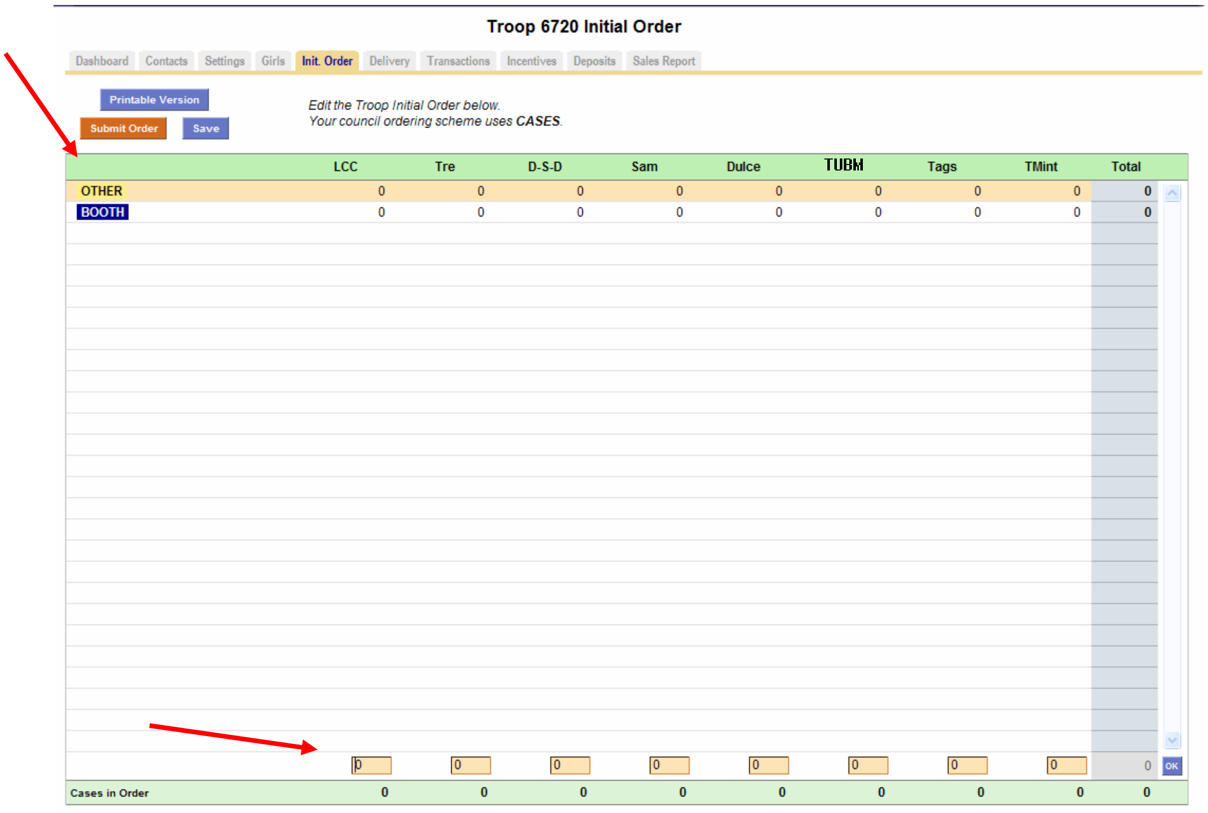
As a service unit, your council may require you to enter troop orders using the troop cookies tab. There are two methods for troop ordering. You will be directed by your council as to the method you are suppose to use.

## Ordering with Booth and Girl Totals

Click on the initial order tab located on the right side of your screen.



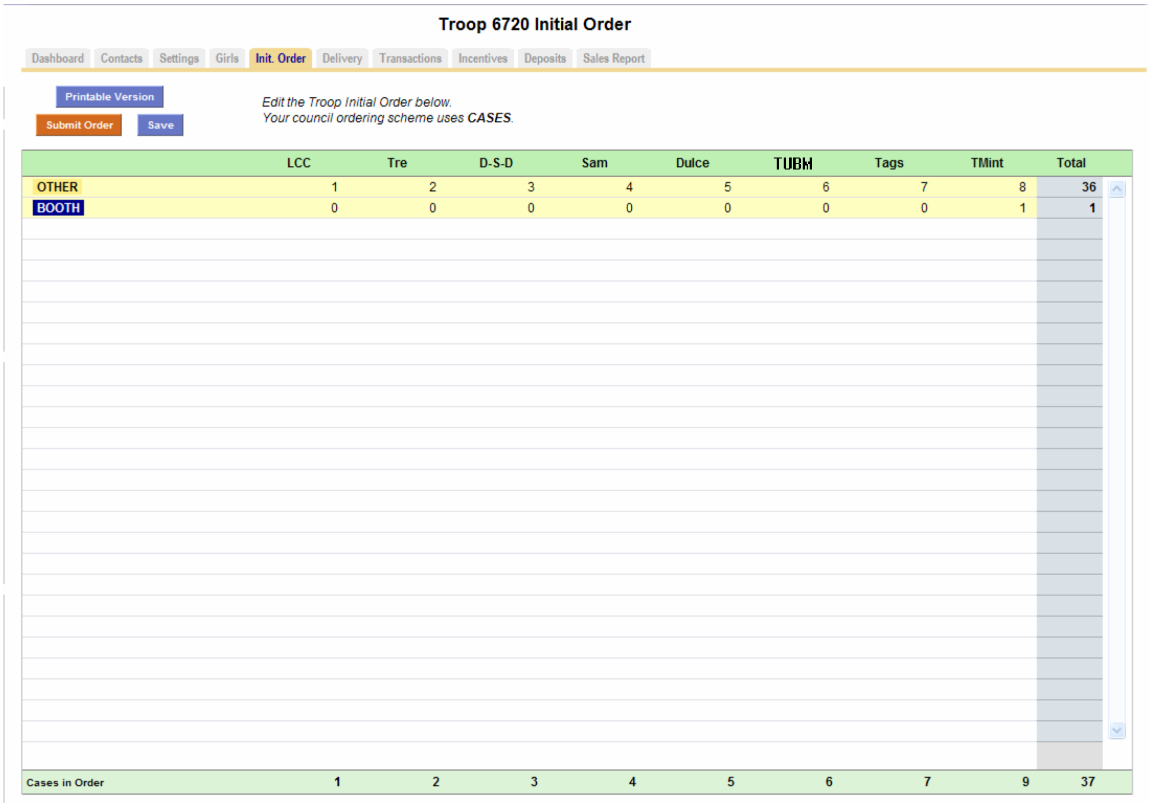

Click on the word **OTHER**. This line is for the total of GIRL orders. The system will highlight the line. Click in the first input box at the bottom of the page, the line will highlight. **NOTE: If your council does not participate in a Gift of Caring program or something similar, you will not see the column labeled GOC.**




Enter the cookie quantities for the girl orders. Tab through the boxes and enter your cookie quantities. The system will show you the total. Verify the total and press enter or click the **OK** button. The system will move the numbers to the **OTHER** line.

If so designated by your council, you can also enter the troop's booth order. Click on the word **BOOTH**. The system will highlight the line. Click in the first input box at the bottom of the page, the line will highlight. **NOTE: The GOC column is not available for booth sales**. Tab through the boxes and enter your cookie quantities. The system will show you the total. Verify the total and press enter or click the **OK** button. The system will move the numbers to the **BOOTH** line.

The system will display the completed order.




To change any information click, the row that needs to be changed. The data will be displayed on the bottom input row. Click anywhere in that row to make changes. Press enter once changes are complete.

You must click the **Save** button to save your information. The system will display that it is saving the information.

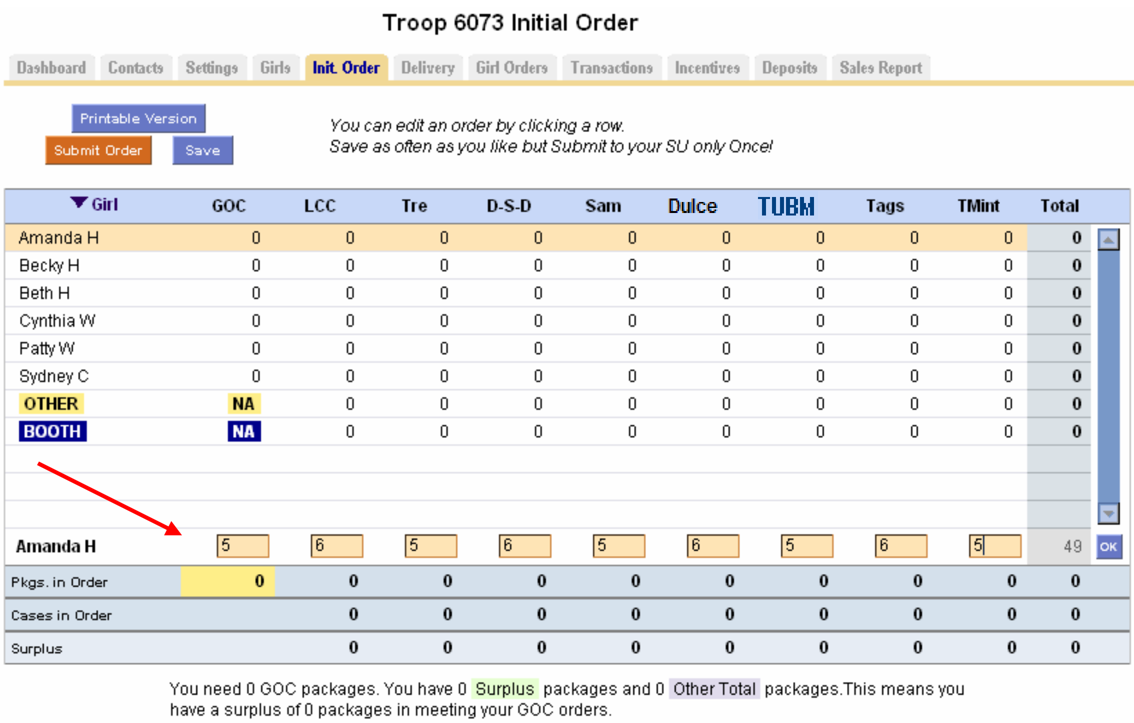

To print the order, click the **Printable Version** button.

**Submit Order** – This button is used to submit a troop order to the service unit. You must still click this button for the service unit to know that this order is done. The system will confirm that the troop order was submitted on the screen and send you an email.

**NOTE: You can only submit your order once. If you have changes after you submit, you will need to contact your service unit cookie manager.**

## Ordering by Individual Girls

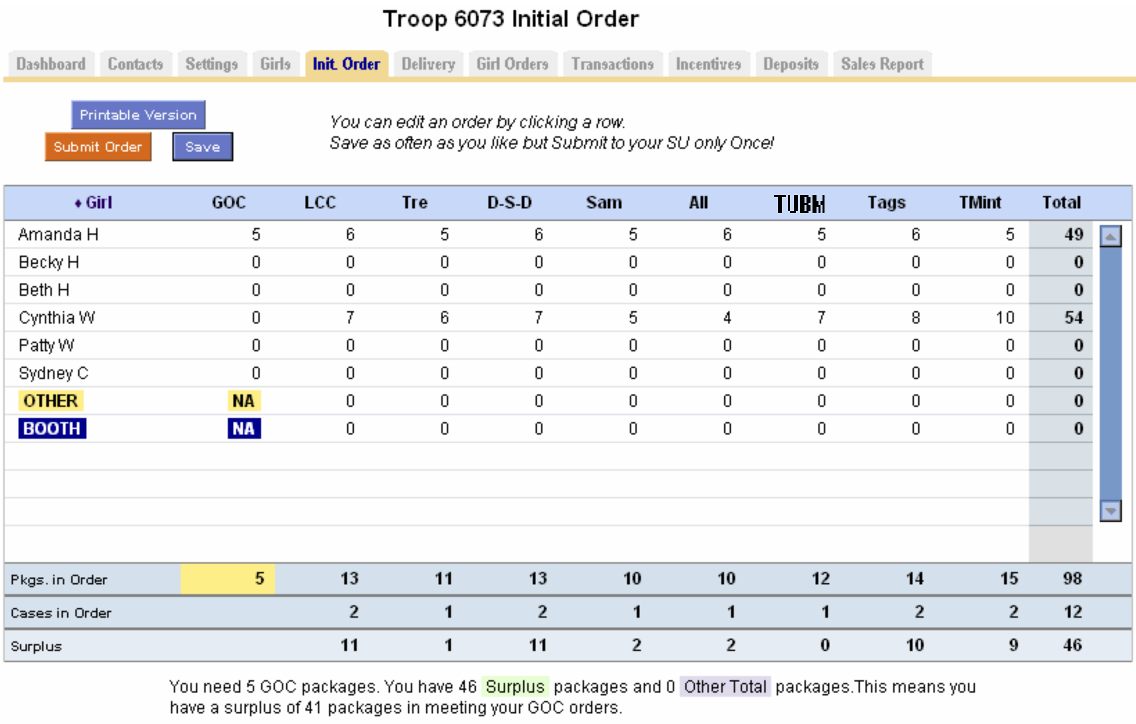
Click on the init. order tab located on the right side of your screen




**NOTE: Girl level ordering must be done in packages. If your council does not participate in the Gift of Caring or similar program with a different name, you will not see that column.**

Click on a girl name in the list. The line will highlight. Enter the quantities in the boxes at the bottom. Tab through the line and enter the cookie quantities needed for the girl. Hit the **enter** key or the **OK** button.

**NOTE: The girl order totals will include the Gift of Caring numbers, the totals at the bottom of the page, will not include the Gift of Caring numbers as the Gift of Caring column is not part of the physical order.**




| Girl | GOC | LCC | Tre | D-S-D | Sam | All | TUBH | Tags | TMint | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| Amanda H | 5 | 6 | 5 | 6 | 5 | 6 | 5 | 6 | 5 | 49 |
| Becky H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Beth H | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Cynthia W | 0 | 7 | 6 | 7 | 5 | 4 | 7 | 8 | 10 | 54 |
| Patty W | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Sydney C | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| OTHER | NA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| BOOTH | NA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Pkgs. in Order | 5 | 13 | 11 | 13 | 10 | 10 | 12 | 14 | 15 | 98 |
| Cases in Order | | 2 | 1 | 2 | 1 | 1 | 1 | 2 | 2 | 12 |
| Surplus | | 11 | 1 | 11 | 2 | 2 | 0 | 10 | 9 | 46 |

You need 5 GOC packages. You have 46 Surplus packages and 0 Other Total packages.This means you have a surplus of 41 packages in meeting your GOC orders.

You can also enter orders for booth or other as directed by your council.

Click on the word **OTHER**. The system will highlight the line. Click in the first input box at the bottom of the page, the line will highlight. Tab through the boxes and enter your cookie quantities. The system will show you the total. Verify the total and press enter or the **OK** button. The system will move the numbers to the **OTHER** line.

If so designated by your council, you can also enter the troop's booth order. Click on the word **BOOTH**. The system will highlight the line. Click in the first input box at the bottom of the page, the line will highlight. **NOTE: The GOC column is not available for booth sales**. Tab through the boxes and enter your cookie quantities. The system will show you the total. Verify the total and press enter or the **OK** button. The system will move the numbers to the **BOOTH** line.

You must click the **Save** button to save your information. The system will display that it is saving the information.


To print the order, click the **Printable Version** button.

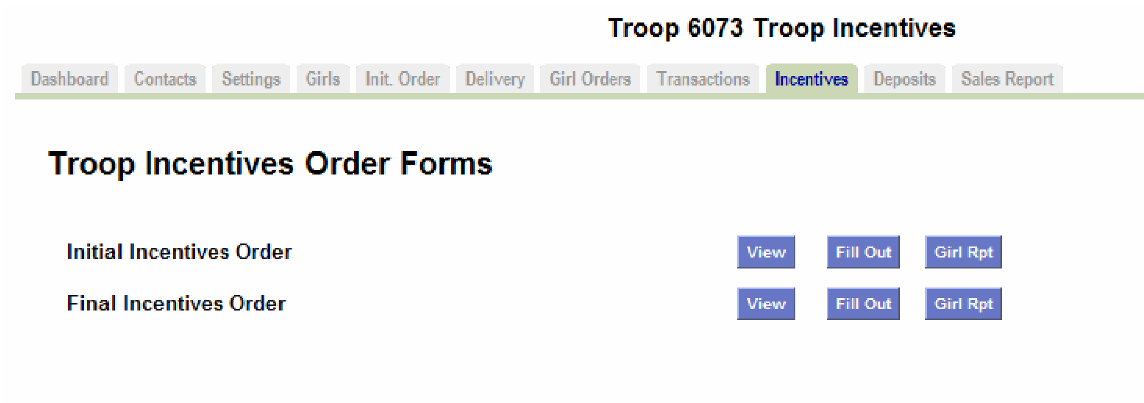
**Submit Order** – This button is used to submit a troop order to the service unit. You must still click this button for the system to know that this order is done. The system will confirm that the troop order was submitted on the screen and send you an email.

**NOTE: You can only submit your order once. If you have changes after you submit, you will need to contact your service unit cookie manager.**

# Appendix B – Troop Incentive Ordering Methods on Troop and Girl Levels

As a service unit, your council may require you to enter troop orders using the troop incentives tab or by individual girl. You will be directed by your council as to the method you are suppose to use.

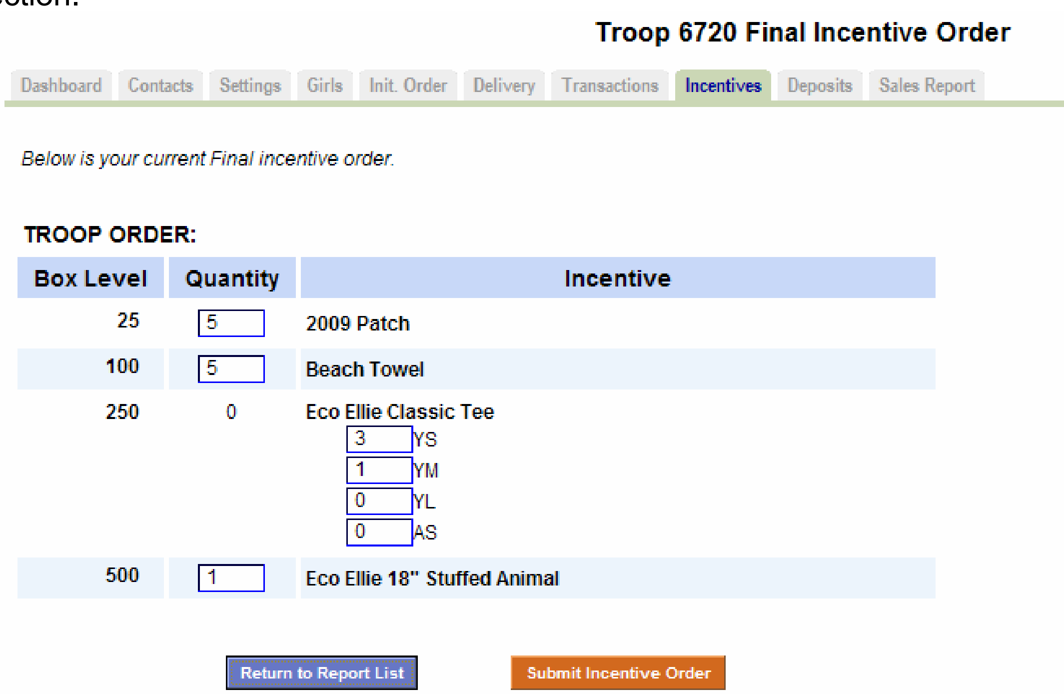
## *Troop Incentive Order*




**NOTE: The Initial Incentives Order option may not be available. This is an option that can be selected by your council.**

For this example we will be working with the Final Incentives Order. The **View** button allows you to see the incentives order. The **Fill Out** button is for entering the troop order.

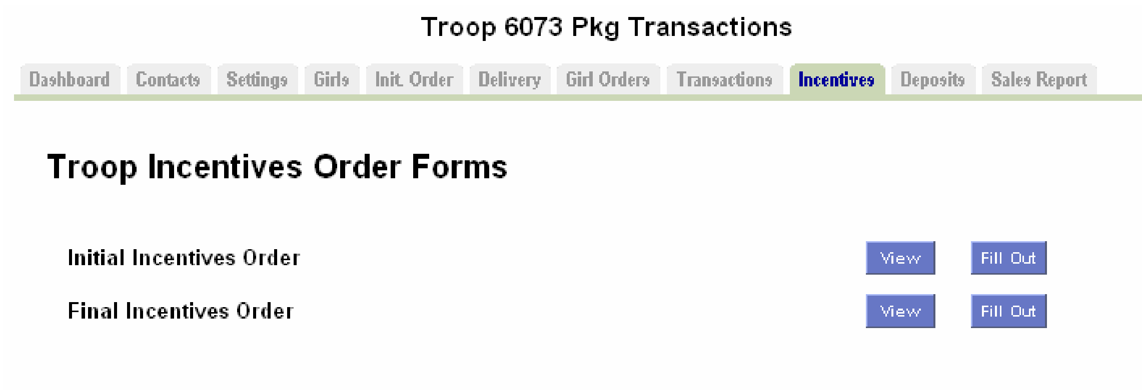
Click the **Fill Out** button. The system will display all the incentives available for selection.



Enter in the quantities for the troop incentive order. Tab through the boxes. Click the **Submit Incentive Order** to submit the order to the service unit. Click the **Return to Report List** button to return to the previous screen.

## Individual Girl Incentive Order

The eBUDDE system automatically will calculate the girl orders based on their boxes sold under the Girl Orders tab. The only thing you will have to do is enter sizes (if appropriate), verify totals and submit your order.




**NOTE: The Initial Incentives Order option may not be available. This is an option that can be selected by your council.**

For this example we will be working with the Final Incentives Order. The **View** button allows you to see the incentives order. The **Fill Out** button is for entering the girl and troop order.

## Troop 6073 Final Incentive Order

Dashboard | Contacts | Settings | Girls | Init. Order | Delivery | Girl Orders | Transactions | **Incentives** | Deposits | Sales Report

*Click on a girl id at the top to edit a girl's incentive order.*

### GIRL ORDERS:

| | |
|---|---|
| Becky H | receives 2 incentives |
| Cynthia W | receives 2 incentives |
| Patty W | receives 3 incentives (size/catalog selection done) |
| Beth H | receives 1 incentives |
| Sydney C | receives 0 incentives |
| Amanda H | receives 2 incentives |

### TROOP ORDER:

| Box Level | Quantity | Incentive |
|---|---|---|
| 25 | 5 | **Marquee Theme Patch** |
| 1 | 0 | **Booth Patch** |
| 50 | 4 | **Journal** |
| 100 | 1 | **Girl Fashion Tee**<br>0 YS<br>1 YM<br>0 YL<br>0 AS<br>0 AM |

Return to Report List | Submit Incentive Order

If you need to enter information for a girl order, the system will tell you.  Click the girl's name.


Enter the size for the t-shirt.  Click the **Submit Girl Order** button.

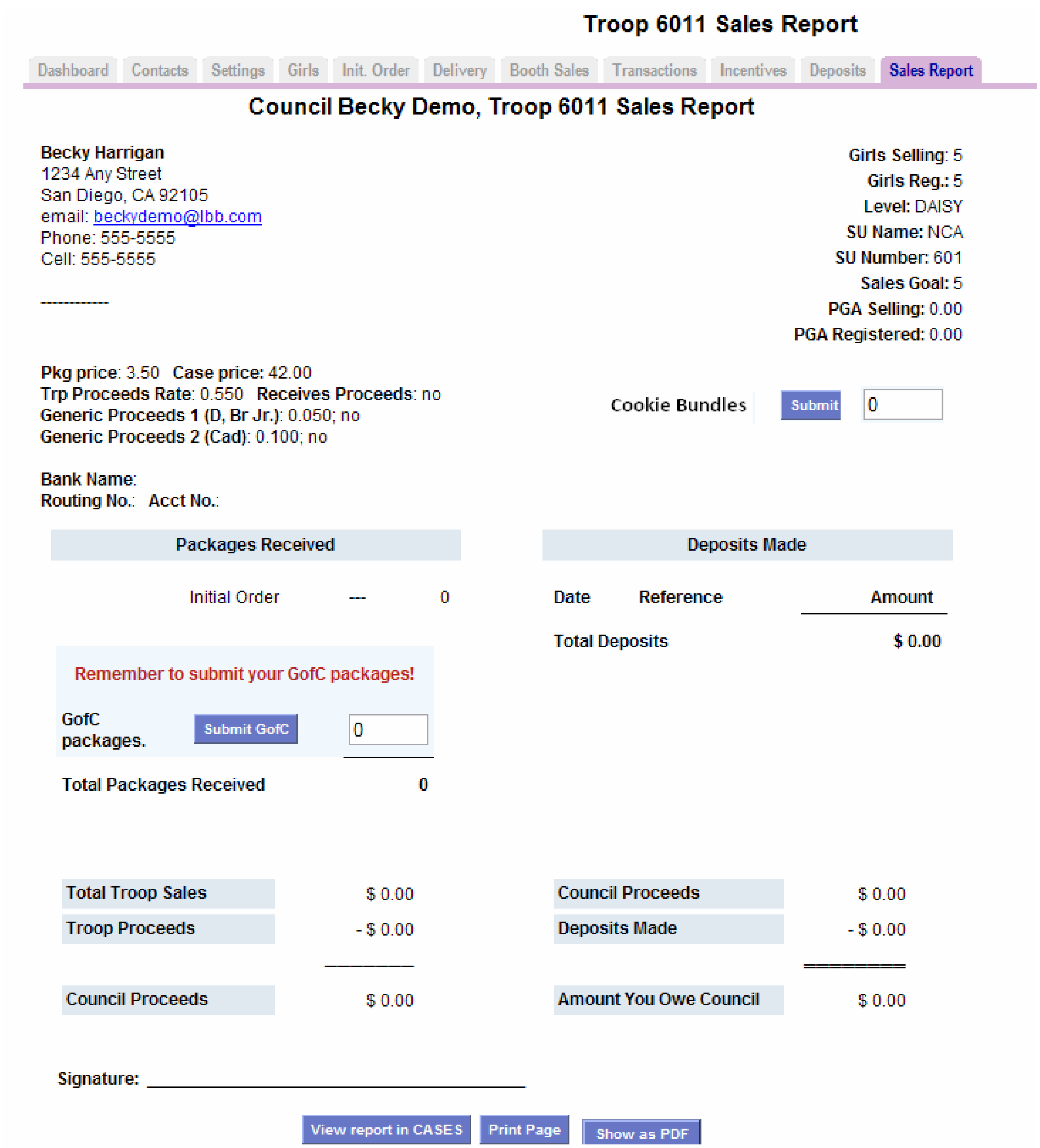
Once all the girl incentive orders have been updated,  review your troop order total.  Enter any additional quantities if applicable.  Submit your troop incentive order to the service unit.

**Return to Report List** – this button returns you to the screen where you can view or fill out.

**Submit Incentive Order** – This button submits the troop incentive order to the service unit.  Once you click this button, the incentive orders for girl and troops cannot be changed by troops only by a service unit user.

# Appendix C – Troop Sales Report

The sales report reflects all transactions for the troop in the system. It includes the initial order, any additional orders, deposits and the calculation for troop profit, council monies and balance due. In addition, you can enter in the amount of Gift of Caring cookies if your council distributes the boxes at the council level. (You never receive the physical boxes). The system will include these packages as part of your packages received.



**Troop 6011 Sales Report**

Dashboard | Contacts | Settings | Girls | Init. Order | Delivery | Booth Sales | Transactions | Incentives | Deposits | Sales Report

**Council Becky Demo, Troop 6011 Sales Report**

**Becky Harrigan**
1234 Any Street
San Diego, CA 92105
email: beckydemo@lbb.com
Phone: 555-5555
Cell: 555-5555

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**Girls Selling:** 5
**Girls Reg.:** 5
**Level:** DAISY
**SU Name:** NCA
**SU Number:** 601
**Sales Goal:** 5
**PGA Selling:** 0.00
**PGA Registered:** 0.00

**Pkg price**: 3.50 **Case price:** 42.00
**Trp Proceeds Rate**: 0.550 **Receives Proceeds**: no
**Generic Proceeds 1 (D, Br Jr.)**: 0.050; no
**Generic Proceeds 2 (Cad)**: 0.100; no

Cookie Bundles Submit 0

**Bank Name**:
**Routing No.**: **Acct No.**:

**Packages Received**

Initial Order --- 0

Remember to submit your GofC packages!

GofC packages. Submit GofC 0

**Total Packages Received** **0**

**Deposits Made**

| Date | Reference | Amount |
|---|---|---|
| Total Deposits | | $ 0.00 |

| | |
|---|---|
| Total Troop Sales | $ 0.00 |
| Troop Proceeds | - $ 0.00 |
| Council Proceeds | $ 0.00 |

| | |
|---|---|
| Council Proceeds | $ 0.00 |
| Deposits Made | - $ 0.00 |
| Amount You Owe Council | $ 0.00 |

Signature: ______________________________

View report in CASES | Print Page | Show as PDF