eBudde Troop Tabs

eBudde™ provides a variety of features for troops to track their cookie sale information. Your council will specify which features you will need to use. Some screens may look a little different as your council can tailor eBudde™ to meet your needs. In addition, some tabs may not be available to you as well.

Dashboard – Default screen that shows important messages, calendar, checklist and dates
Girls – This allows you to enter girl names, grade, id and goal information
Init. Order – This option is for entering your troop initial cookie order
Delivery – This option is for your initial cookie order pickup
Girl Orders - Track girl initial, booth and additional orders and payments
Transactions – List all cookie transactions, initial order, cupboard pickups, and troop-to-troop transactions.
Cookie Exchange – Post that you have available cookies by variety and see what is available from others.
Rewards – Troop reward ordering_
Booth Sites – This option allows you to select council booth sale sites and/or request a troop booth sale site.
Payments – This option shows all payments made to council.
Sales Report – Recap of all troop information. Initial order, additional cookies, troop profit, payments and submitting total Gift of Caring numbers (if applicable)
Reports – Two reports available for troops. Cupboard listing and delivery sitelisting.

Girl Order Tab

This tab allows you to enter by girl, additional cookie orders, booth sales packages sold, all by variety, Gift of Caring pkgs and payments. You can add a comment on each row. There are two views of the girl orders. You can see a summary troop view or each girl's detail. The system defaults to the troop summary view. Your council may limit your girl transaction to not exceed the troop package total.

Troop Summary View

On the Troop Summary View you have three buttons.
Printable Version – click this button to print the summary view in HTML format.
Record Booth Sale – click this button takes you to the Booth Site tab so you can record booth site packages sold.
Export - click this button if you want to download this information to save as an html file or cut and paste into another program. This is available on the Troop Summary screen only.

The system will tell you how many cookies you have ordered through the initial order, cupboard/depot pick-ups, and/or troop transfers. It will then tell you the difference between what has been allocated to the girls. This will help to ensure that you allocate all the cookies received to your girls.

Girl Totals – This line shows you all the cookies that have been allocated to the girls. Your goal is to match the total number for the girl totals line to the total number for the troop order line.
Troop Order – This line shows you all the cookies the troop has received either via initial order, troop-to-troop transactions, pick-ups from the service unit and/or cupboard. These packages are ultimately what the troop is responsible to pay for. This line will update throughout the cookie sale.
Difference - This line is to help you know if you need to allocate more cookies to girls or if you have over allocated. The goal is that the total column on the Difference row will be 0 by the end of the sale. As you assign cookies to girls, the girl total line will be updated. As transactions are posted to your troop (see the transaction tab or sales report for details), the troop order line will be updated.

You also have two tabs at the bottom. Active and inactive. eBudde™ tracks all girls. Girls can now be flagged inactive. If they are flagged inactive they will not show up on the inactive tab. Inactive girls must always have 0 packages sold and no balance due. The active tab will always be the first one you will see. If you need to see your inactive girl, press the tab and you will see those girls.

Girl View

The girl view will show you the detail transactions for the girl. The first row will usually show the initial order which is locked and cannot be changed on this screen. You will need to change these numbers on the initial order tab. If the initial order tab is unavailable you would need to contact your appropriate council staff/volunteer.

Printable – This button allows you to print a listing of all the information for the girl.
Add Trans – This button allows you to add transaction(s) to the girl. You may add as many transactions as necessary. You can enter in cookie transactions, payment transactions or both in one transaction.
Add Payment – This button allows you to add only a payment. You may add as many of these transactions as necessary.
Save – This button is to save the transactions you have created. If you do not save your data, you will lose that data. You do not have to save after every transaction but must save before you leave the screen to avoid losing your data.
Switch to Girl – This allows you to enter transactions for another girl without having to always go back to the troop view. Click the dropdown arrow and select a girl name.
Return to Summary View – This link allows you to return back to the troop summary view. Any transaction entered will automatically be displayed on the summary view.

Adding Only Payments

You may add a payment to any available line in a girl record. To enter a payment, click the Add Payment button. You then double-click in the paid box at the bottom of the screen. Click the Enter key to end the data entry OR click the OK button. The information will be displayed on the grid. Click the SAVE button to save the transaction(s).
You will now be able to add only payments even if the system is closed to you for other data entry.
Once this tab is unavailable, the Add a Transaction button will no longer be active but you will still see the Add Payment button so you can add payments always.

Transactions Tab

The troop transaction tab is a listing of all cookies ordered, additional cookie pickups, and troop-to-troop transfers (council option). Your council will instruct you on what transactions you are allowed to make. If you do not have an Add a Transaction button, you are not allowed to do any data entry on the transaction tab.

Initial Order Transaction

The initial order transaction will show up once you submit your order to the service unit. It will have receipt # of (Init. Delivery) It will always be locked to changes. If it is not correct, see your council who can adjust appropriately.

Troop transactions from Other Sources

The transactions tab will also list cookie transactions from any other source that the council has available.

Pending troop orders (optional)

Troops can now place pending cookie orders to service units and/or cupboards. The status of the order will display in the Pending column. Cupboards can now require pending orders to be place a certain time prior to pick up. Example – they can set that the transaction needs to be in 24 hours to the date/time in the pickup option.

Create a product transaction

To create an inventory transaction, left-click the Add a Transaction button. The system will display a product transaction form.
Date – enter the date of the transaction. The system will default to the current date or the previously keyed date
Pickup – You can specify a preferred pickup date and time. The cupboard may require that you select a date and time when the cupboard is open for business. When you select the cupboard the days and hours a cupboard is open will appear under the Hours of Oper. header.
Type – Select type of transaction.
Normal – Transaction with no specific designation
Second Party: - this refers to the other party that is getting/giving the cookies. 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/warehouse.

Product Movement: You have two options. Remove Product or Add Product - If cookies are being added to your troop, click Add Product. If cookies are being removed from your troop, 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.
Contact Info – This is for you to provide contact information so the other party has this information if needed.
Contact Info – This information allows the other party to contact you if needed. eBudde™ will pre-fill this information with your contact information.
Additional Info: Lets you know if any varieties are unavailable. The variety data entry box will be greyed out.
Hours of Operation: Lets you know what days and times the cupboard you selected is open.
The add more button allows you to create multiple transactions by going to an 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.
Save and Print – This button has two functions. It will print a receipt AND save the transaction. This button replaces the Receipt button. The receipt button only printed the receipt and did not save the transaction unless you clicked the save button on the summary grid.

Create a Pending Order Request for a Cupboard
A troop can create a pending cookie order request for a cupboard on the transaction tab.
Second Party: Cupboard is selected and a cupboard number is entered
Product Movement: Add is selected
Additional Info: Lets you know if any varieties are unavailable. The variety data entry box will be greyed out.
When you click Okay and the transaction is displayed on the grid, you will see a yes under the pending column.
The transaction may be locked immediately or your cupboard will lock the transaction appropriately according to council's process. If a cupboard has entered their hours of operations in the system, these hours will be viewable under the Hours of Oper. Header. The cupboard may also have additional notes that will be displayed at the bottom of the form. A cupboard can also require that the pickup date and time be within the hours of operation. If you try to schedule a pickup time that is not within that timeframe, the system will give you a transaction error message. You will not be able to save the transaction until you enter in a valid date and/or time. A cupboard can require that there is a deadline for when the orders can be placed in the system for pickup. In the example below, the transaction must be entered into eBudde™ 24 hours prior to the pickup date and time.

Cookie Exchange Tab

The Cookie Exchange allows you to see what cookies other troops have to exchange. It also allows you to post what extra cookies you have to exchange. Your council will determine if the troops you see are council-wide or only within your service unit/area. When you first go to this tab, you may see all zeros until you and other troops post your transaction. **A troop only has one record that you can overwrite as your inventory changes. eBudde™ does not verify the numbers entered by the troops.**

To enter the extra cookie packages that you have that you would like to exchange:
Enter the quantities in packages in the variety boxes. Click Submit. If you no longer have all the extras originally posted, changed the quantities appropriately and click Submit. The submission will OVERWRITE the previous submission. There is only one record per troop in the Cookie Exchange. To see what cookies are available by other troops:
Click the blue down arrow to the left of the variety. eBudde™ will display the troops that have extra cookie packages. It will list for you the date posted, the troop number, quantity available, the first name of the contact, email address and phone number. You can then contact that person via email/phone to make the exchange.

Rewards Tab

There are two methods of entering in rewards. The rewards tab is for troops placing a compiled troop reward order. You may also create reward orders by girl.

Troop Reward Order

Click the Fill Out button. The system will display all the rewards available for selection.
If there is a reward based on PGA, the troop PGA will be displayed on the summary screen so you do not have to refer to the troop sales report.
Enter in the quantities for the troop reward order. Tab through the boxes. Click the Submit Reward Order to submit the order to the service unit. Click the Return to Report List button to return to the previous screen.

Individual Girl Reward 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. The Fill Out button is for entering the girl and troop order.
If you need to enter information for a girl order, the system will tell you. eBudde™ will point that out to you by highlighting a message in red saying (size/catalog selection needed). Once you have submitted the girl's order, eBudde™ will display the message in green. (size/catalog selection done).

You can now edit all girl orders at the same time or click each girl individually.

To update a specific girl you:

Click the girl's name.
The girl screen will vary based on your council reward program. There may be more/less levels. There may be choices to pick one item over another. See your council for specifics on your reward program. Click the Submit Girl Order button. If you do not want to submit the girl order, click the Cancel button. The system will now remind you to submit your troop order after submitting a girl order. There will be messaging displayed for you as a reminder.
OR you may now click the Edit All link.
When you click the Edit All link, eBudde™ will display all the girls in the troop and their boxes sold and t-shirt sizes. It will then list the rewards the girl has earned. If there are choices or sizes, you will select all those selections for all the girls before you submit.
Once you have updated all the girl rewards and submitted, eBudde™ will show that the selections were completed.
Once all the girl reward orders have been updated, review your troop order total. You may need to enter additional quantities for items that are not automated. In the example below, you would need to enter a quantity in the box labeled GOC Patch. Once you have entered that number, you will click the Submit Reward Order button to submit your order to your service unit.

Booth Sites Tab

You can now be put on a waitlist for a booth location for a specific date. Click the *Notify Me if Slots Open* button. eBudde™ will then send you an email if any one or more of the slots become open.
KEEP IN MIND – IT IS A FIRST COME, FIRST SERVE FOR SIGNING UP FOR THE SLOT!
There may be several of you that get the email. You will need to go into eBudde™ or Troop App to claim that slot. There is a possibility that someone else got there first to claim! Once you have asked to be notified, eBudde™ will continue to send emails when slots become open. If you want to turn the notification off, go back to the booth site and you will see a button that says Stop Notifying Me. Click that button and eBudde™ will stop the notifications for that location/date. Troop Booth Signup Request (Optional) Council may allow troops to request personal booth sites through eBudde™. eBudde™ has a process for approving/denying requests and you can see the status of your request once submitted.

Record Sales (Optional)

A troop can record their booth site sales. The troop records total packages sold and then can distribute those packages to the girls. You can record sales for both council sites and troop requested sites. Select Record Sales from the dropdown list. The system will display the booth sites that the troop has signed up for. Sales are listed in chronological order, oldest to newest. If you have recorded sales for a booth site, it will appear gray in the list. You can still open and edit if necessary.

Recording Booth Sales

Click the booth site that you want to record sales against. You will be required to enter the total packages sold at the booth site by variety for the troop. eBudde™ will calculate the monies collected. eBudde™ allows you to distribute the cookies among the girls attending the booth site. eBudde™ will assume all girls have attended by checking the box next to their name. If there is a girl that did not attend, uncheck the box next to her name. You can now select all or deselect all by checking the (De)select all Box. You may key in the packages sold for each girl or let eBudde™ automatically evenly distribute those boxes. If you want it done by eBudde™, be sure the appropriate girls are checked and click the Distribute button. Once you have completed all the data entry, click the Submit Sale button. eBudde™ will create a transaction record on the girl order tab for each girl that you have checked.

If you need to make changes, you will not be able to make those changes on the girl order tab, you will need to go to the booth site tab for any changes.

Sales Report Tab

The sales report reflects all transactions for the troop in the system. It includes the initial order, any additional orders, payments and the calculation for troop profit, council monies and balance due. Gift of Caring/Donation cookies will automatically populate on the sales report from the girl order tab. We have now secured the display of the bank account and routing numbers. These numbers will be hashed out as a default. Council can designate specific users that may see the full numbers.