

Transaction 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.

Receipt	Pending	Type	Date	2nd Party	Pickup	Sv Sm	Tre	D-S-D	Sam	Tags	TMint	SMr	Toff	Total
Init. Del.			07/25	--		36	24	24	48	36	60	48	168	444
VH000	yes	normal	07/26	C673	08/05	12	0	0	0	0	0	12	12	36
On Hand						36	24	24	48	36	60	48	168	444
Pending (Cup. Orders)						12	0	0	0	0	0	12	12	36
After Pending						48	24	24	48	36	60	60	180	480

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. Del.) . 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

Inventory Balances

The inventory balance located at the bottom of the screen is a tool for the troop cookie person to know what cookies they are responsible for.

Navigating the Transaction Form

Receipt	Pending	Type	Date	2nd Party	Pickup	Sv Sm	Tre	D-S-D	Sam	Tags	TMint	SMr	Toff
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The columns listed from left to right are as follows:

Receipt – This is the receipt code of the transaction

Pending – This shows if the order is pending.

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

Pickup – Date of pickup. Form shows time as well.

SvSm– Savannah Smiles

Tre – Trefoils

D-S-D – Do-Si-Dos

Sam – Samoas

Tag – Tagalongs

TMints – Thin Mints

SMr – S'mores

Toff – Toffee

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.

Page:
08/09 - 07/28

Page:
08/10 - 06/11
08/10 - 06/11
06/10 - 06/10

Page – the transaction tab is displayed in pages. There are 15 rows to a page which may require using the scroll bar to the right to see all rows. You will see the most recent page of transactions. To see past transactions, click the dropdown next to the label **Page**. Select the appropriate date range. The system will refresh and you will see that page. . The range currently displays date. That is the default. If you select a different sort like receipt number, the range will change to display receipt numbers.

Page – the transaction tab is displayed in pages. There are 15 rows to a page which may require using the scroll bar to the right to see all rows. You will see the most recent page of transactions. To see past transactions, click the dropdown next to the label Page. Select the appropriate date range. The system will refresh and you will see that page. . The range currently displays date. That is the default. If you select a different sort like receipt number, the range will change to display receipt numbers.

Create a product transaction

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

Cookie Transaction

Date: 2016-07-26

Pickup:

Receipt: 011000

Type: Normal

2nd Party: Cupboard

Variety	Cases	Pkgs
Savannah Smiles	0	0
Trefoils	0	0
Do-Si-Dos	0	0
Samoas	0	0
Tagalongs	0	0
Thin Mints	0	0
S'mores	0	0
Toffee-tastic	0	= 0

Product Movement

Add Product

Contact Info

Becky Harrigan
beckydemo@lbb.com
123 Any Street
San Diego

Additional Info.

Hours of Oper.

+

Save/Print

Okay

Cancel

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.

Receipt : - this is a fifteen character alphanumeric field that you may use for reference to the transaction. **NOTE: This box cannot be left blank. eBuddle™ will default to an automated number. If you need to key your own receipt number, you can override just by keying in the box. If you key in the box by mistake, click the**

button to have eBudde™ create a receipt number for you. The status of the receipt is determined by councils. Councils can choose to have it totally locked, locked upon saving or open for edits.

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**)

Reorder – Cupboard transaction for additional cookies (**This option available at council discretion**)

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 number.

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 (optional) – 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 (Optional)

A troop can create a pending cookie order request for a cupboard on the transaction tab. If your council has this option available, the order is created automatically if the following options are selected on the product transaction form:

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. You council will advise the locking timing.

Cookie Transaction

Date: 2016-07-26

Pickup:

Receipt: 011000

#

Type: Normal

2nd Party: Cupboard

Service Unit 673 (673)

Map It

Variety	Cases	Pkgs
Savannah Smiles	0	0
Trefoils	0	0
Do-Si-Dos	0	0
Samoas	0	0
Tagalongs	0	0
Thin Mints	0	0
S'mores	0	0
Toffee-tastic	0	0

Product Movement

Add Product

Contact Info

Becky Harrigan
beckydemo@lbb.com
123 Any Street
San Diego

Additional Info.

Hours of Oper.

7:00pm-9:00pm M,Tu,W,Th,F;
from 07/25/16 to 08/26/16
6:00pm-9:00pm Weekends;
from 07/30/16 to 08/21/16
8:00am-6:00pm
Su,M,Tu,W,Th,F,Sa; from
08/23/16 to 08/31/16
10:00am-4:00pm Weekends;
from 07/30/16 to 08/21/16

Monday - Friday: 7pm - 9pm
Saturday - Sunday 8am - 6pm
Closed 8/22

+

Save/Print

Okay

Cancel

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.

Transaction Error

Pickup time must be within hours of operation
for the chosen Cupboard

OK