



# Smart Cookies Managing Orders



# Managing Orders



1. Login to [www.abcsmartcookies.com](http://www.abcsmartcookies.com)
2. Click on Manage Orders
3. Review Manage Orders Grid
4. Learn how to manage Initial, Planned, Transferred and Cookie Share Orders.

# Login to [www.abcsmartcookies.com](http://www.abcsmartcookies.com)

Hover over the Orders Tab, click on Manage Orders

The screenshot shows the Troop Dashboard for Troop 102 in Central Maryland. The navigation menu includes Dashboard, My Troop, Orders, Booth, Recognitions, Finances, Reports, Cookies, Tips & Tools, Media, and Help. The 'Orders' tab is active, and a dropdown menu is open, highlighting 'Manage Orders'. Other options in the dropdown include Troop Initial Order, Transfer Order, Planned Order, Damage Order, and Virtual Cookie Share. The dashboard features a progress bar for the Troop Package Goal (3500) with 2700 sold, and four summary cards for performance metrics.

PER GIRL AVERAGE (Packages per Girl Selling)	INVENTORY: TOTAL ORDERED (Packages)	TOTAL SOLD (Packages)	TOTAL ON HAND (Packages)
This Season: 172.55 \$702.20	This Season: 3,451	This Season: 2,700 \$11,065.00	This Season: 751 \$2,979.00
Last Season: 0.00 \$0.00	Last Season: 0	Last Season: 0 \$0.00	

# Manage Orders Grid

The top four boxes will show data from ALL transactions associated with the troop. These Summary Boxes are displayed in CASES ONLY and may be rounded up.



Click “Show Transactions” under the specific boxes and only those types of transactions will appear on the lower half of the page.

**Planned** shows a summary of current planned/pending orders to the cupboard.

**Ordered** shows ALL transactions (Initial, transfers, reorders) received by the Troop.

**Sold** shows ALL cookies that have been transferred to girls or reported sold at booths.

**OnHand** shows what the troop currently has in inventory.

# Manage Orders Grid

The screenshot displays the 'Manage Orders' interface with the following data:

Status	Cases	Total Value	Action
PLANNED	1765	\$105,900	Show Transactions
ORDERED	1281	\$76,875	Show Transactions
SOLD	944	\$56,655	Show Transactions
ONHAND	337	\$20,220	Details

Below the summary cards is a filter bar with the following options: ALL, INITIAL ORDER, PLANNED, RESTOCK, TRANSFER, DAMAGED, COOKIE SHARE, DIRECT SHIP, CS DONATION, and TRANSACTIONS. A 'REFINE SEARCH' dropdown menu is also present, with an 'Apply Search Parameters' button below it.

To view ALL the transactions associated with the Troop, check the “All” Button, then click “Apply Search Parameters” and ALL transactions will appear on the lower half of the page.

To view only certain transactions, click on the type of order you want to view, then click “Apply Search Parameters” and only that type of order will appear on the lower half of the page

# Manage Orders – Refine Search

The screenshot displays the 'Manage Orders' interface. At the top, there are four panels, each showing 'Cases' with a '0' and 'Total Value' of '\$0'. Below these panels is a 'Clear all filters' button. A horizontal filter bar contains several categories: 'ALL' (highlighted with a yellow box), 'INITIAL ORDER', 'PLANNED', 'RESTOCK', 'TRANSFER', 'DAMAGED', 'COOKIE SHARE', 'DIRECT SHIP', and 'CS DONATION'. Below this bar is a 'REFINE SEARCH' dropdown menu (also highlighted with a yellow box). The main content area is divided into three columns: 'Troops', 'Girls', and 'Cupboards'. Each column has a search bar and a list of items. In the 'Troops' column, item '1097' is selected with a checkmark. In the 'Girls' column, a dropdown menu is open, listing 'Denise Bowen', 'Kathy Jones', 'Linda Blomberg' (selected with a checkmark), and 'Rosemarie Severson'. In the 'Cupboards' column, a dropdown menu is open, listing 'Regular Cupboards', 'Council Office Cupboard', and 'Volunteer cupboard'. At the bottom of the interface is an 'Apply Search Parameters' button.

To view one individual girl's orders, click on the type of order you want to view, then click "Refine Search" and choose the girl or girls you would like to view from the dropdown list. Then, choose "Apply Search Parameters" and only those orders will appear on the lower half of the page.

# Manage Orders Grid

Summary dashboard showing four categories: PLANNED, ORDERED, SOLD, and ONHAND. Each category displays 'Cases' and 'Total Value' with a 'Show Transactions' button. The 'ALL' filter is highlighted in a yellow box.

Category	Cases	Total Value
PLANNED	120	\$5,760
ORDERED	388	\$18,888
SOLD	211	\$10,399
ONHAND	177	\$8,489

18 Results

Search By: All Keyword:

From:  To:  Apply

Cases  Packages  Cases/Packages

Action: Select Apply

DATE	ORDER #	TYPE	TO	FROM	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	STATUS	TOTAL	TOTAL \$
10/14/2017	29	C2T	123	Cookie jar 2	0	48	48	48	48	48	48	48	48	48		432	1728.00
10/14/2017	58	COOKIE_SHARE	123	123	34	0	0	0	0	0	0	0	0	0	SAVED	34	136.00
10/16/2017	59	DAMAGED	123	123	0	-3	-7	-8	-2	-9	-4	-9	-6	0	T	-48	-192.00
10/16/2017	60	DAMAGED	123	123	0	-5	-5	-5	-5	-5	-5	-5	-5	-5	SAVED	-45	-180.00
10/12/2017	10	INITIAL	123	123	0	72	108	96	60	120	84	108	72	36	C	756	3024.00
10/17/2017	61	PLANNED	123	Cookie jar 2	0	60	60	60	60	60	60	60	60	60	SAVED	540	2160.00
10/12/2017	14	T2G	Dawn-Daisy Smith	123	0	-15	-15	-15	-15	-15	-15	-15	-15	-15		-135	-540.00

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Export to Excel

Once all filters are applied, data can be exported to Excel for better viewing.

# Manage Orders Bottom Half of Grid

- The Bottom of the Manage Order page will show in detail the total data of those transactions filtered in the “Summary” section.
- The Summary section provides the total of what was filtered in either Cases or Packages. Those options can be adjusted.
- The “Click the Arrow for More!” option provides more detailed information of those filtered transactions.
- The “Details” button within each box will provide a breakdown of each variety set in Cases and the Total dollar value within each variety.

The screenshot displays the 'Manage Orders' interface. At the top, a 'Summary' button is highlighted with a yellow box. Below it is a table with columns for various varieties and their counts/total values.

CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	CASES	TOTAL \$
31	54	54	54	54	54	54	54	54	14	483	23366.00

Below the table is a button labeled 'Click the Arrow for More!' which is also highlighted with a yellow box.

The bottom section shows a detailed breakdown of cases and total values for two categories: 'PLANNED' and 'ORDERED'. Each category is further divided into 'Cases' and 'Total Value'.

**PLANNED**

Category	Total	Subtotal
Cases	120	CShare 31   \$1,520
Total Value	\$5,760	SMR 42   \$2,056

**ORDERED**

Category	Total	Subtotal
Cases	266	TAL 42   \$2,056
Total Value	\$13,080	LEM 42   \$2,056

Each category also includes a 'Details' button (highlighted with a yellow box) and a 'Less' button.

# Manage Orders – Initial Order

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- The Initial Order is the first troop order that will be picked up at initial delivery
- To view the Initial Order, click on Initial and then click Apply Search Parameters.
  - The Transaction will appear showing the following information:
    - Date the Initial Order was entered
    - Order #
    - Type of Transaction
    - Troop Number receiving the order
    - The quantity of each variety
    - Order Status: Order can be edited up until the Troop Order Due Date, then once approved by the Council, it is set in View only status.
    - The Total in Quantity and Dollar Value
    - The order can be edited up until the Troop order due date. Click on the 3 dots on the far right to edit the order

# Manage Orders – Initial Order Screen View

**Manage Orders**

PLANNED	ORDERED	SOLD	ONHAND
Cases: <b>120</b>	Cases: <b>388</b>	Cases: <b>211</b>	Cases: <b>177</b>
Total Value: <b>\$5,760</b>	Total Value: <b>\$18,888</b>	Total Value: <b>\$10,399</b>	Total Value: <b>\$8,489</b>
<a href="#">Show Transactions</a>	<a href="#">Show Transactions</a>	<a href="#">Show Transactions</a>	<a href="#">Details</a>

for all filters

for all filters

[ALL](#)
[INITIAL ORDER ✓](#)
[PLANNED ✓](#)
[RESTOCK ✓](#)
[TRANSFER ▼](#)
[DAMAGED ✓](#)
[COOKIE SHARE ✓](#)
[DIRECT SHIP ✓](#)

[Apply Search Parameters](#)

**1 Results**

Search By:  Keyword:

From:  To:  [Apply](#)

Cases
  Packages
  Cases/Packages
 Action:  [Apply](#)

DATE	ORDER #	TYPE ▼	TO	FROM	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	STATUS ▼	TOTAL	TOTAL \$
8/22/2017	60	INITIAL	102	102	255	300	300	300	300	300	300	300	300	300	SAVED	2955	12120.00

# Manage Orders – Planned Order

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- To view the Planned Orders, check the Planned filter and then click “Apply Search Parameters”.
- The Transaction(s) will appear on the grid showing the following information:
  - Date the Planned Order was entered
  - Order #
  - Type of Transaction –orders displayed as Planned until approved Once approved, the Planned orders are converted into a Cupboard to Troop Transfers (C2T)
  - Troop Number receiving the order
  - The quantity of each variety
  - The Status of the order – Planned orders can be edited or Deleted until the planned order deadline. Click on the three dots to the far right and select edit, delete or view. Make the necessary changes, then click “save”.
  - The Total in Quantity and Dollar Value

# Manage Orders – Planned Order Screen View

**Manage Orders**

PLANNED	ORDERED	SOLD	ONHAND
Cases: 45 Total Value: \$2,160 <a href="#">Show Transactions</a>	Cases: 220 Total Value: \$10,564 <a href="#">Show Transactions</a>	Cases: 81 Total Value: \$3,916 <a href="#">Show Transactions</a>	Cases: 138 Total Value: \$6,648 <a href="#">Details</a>

all filters

ALL INITIAL ORDER **PLANNED** RESTOCK TRANSFER DAMAGED COOKIE SHARE DIRECT SHIP

REFINE SEARCH [Apply Search Parameters](#)

1 Results

Search By: All Keyword:

From:  To:  [Apply](#)

Cases  Packages  Cases/Packages Action: [Select](#) [Apply](#)

DATE	ORDER #	TYPE	TO	FROM	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	STATUS	TOTAL	TOTAL \$
10/17/2017	61	PLANNED	123	Cookie jar 2	0	60	60	60	60	60	60	60	60	60	SAVED	540	2160.00

# Manage Orders – Transfer Orders

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- To view the transfers, click on the dropdown arrow next to transfers, check All to view all transfer activity or check only the Transfers needed and they will appear on the screen.
- The Transactions show the following information:
  - Date the Transfer transaction was entered
  - Order #
  - Type of Transfer – G2G, G2T, T2G, T2T, T2C, C2T,
  - Who received the Transfer
  - Who the Transfer is from
  - The quantity of each variety
  - The Total in Quantity and in Total Dollar Value
- Cupboard to troop transactions will be view only. Troop may edit or delete transfers they have created – for instance troop to girl.
- There can be multiple pages of Transactions, use the number tab on the bottom to click to the next page
- The chosen transaction(s) can be viewed in an Excel Spreadsheet

# Manage Orders – Transferred Orders Screen View

Clear all filters

ALL INITIAL ORDER PLANNED RESTOCK **TRANSFER** DAMAGED COOKIE SHARE DIRECT SHIP

REFINE SEARCH Apply Search

29 Results

From To Apply

Keyword

Action Select Apply

DATE	ORDER #	TYPE	TO	FROM	CShare	TAL	SMR	PBP	CD	PBS	GFT	STATUS	TOTAL	TOTAL \$
9/28/2017	361	T2G	Angel Byrd	102	0	-3	-3	-3	-3	-3	-3		-27	-111.00
9/28/2017	362	T2G	Angie Gregory	102	0	-12	-3	-3	-3	-3	-3		-36	-147.00
9/28/2017	363	T2G	Casey Smith	102	0	-3	-8	-3	-3	-3	-3		-32	-131.00
9/28/2017	364	T2G	Christina Boone	102	0	-3	-3	-8	-3	-3	-3		-32	-131.00
9/28/2017	284	G2T	102	Shannon Gonzalez	0	13	13	13	13	13	13		117	481.00
8/23/2017	63	C2T	102	Cupboard 9003	0	24	24	24	24	24	24	0	192	768.00
8/23/2017	62	C2T	102	Cupboard 9003	0	50	50	50	50	50	50	0	400	1536.00
8/26/2017	134	C2T	102	Cupboard 9003	0	48	48	48	48	48	48	0	384	1536.00

Summary

CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	PACKAGES	TOTAL \$
34	175	207	194	164	217	186	205	172	142	1696	6784.00

Click the Arrow for More!

# Manage Orders – Cookie Share Order

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Cookie Shares are packages purchased by customers for donation to the council cookie share partners.

- To view the Cookie Shares, click on the filter option and then click “Apply Search Parameters” and the order will appear on the screen
- The Transaction will show the following information:
  - Date the Cookie Share order was entered or edited
  - Order #
  - Type of Transaction
  - Troop number associated with Transaction
  - The total quantity of Cookie Shares orders.
  - Status of the Order - saved
  - The Total quantity and Total Dollar Value
  - Orders may be edited by clicking on the three dots at the end of the row. Any orders designated COOKIE\_SHARE (B) or COOKIE\_SHARE(VB) can only be edited using the Smart Booth Divider

# Manage Orders – Cookie Share Screen View

Clear all filters

ALL INITIAL ORDER PLANNED RESTOCK TRANSFER DAMAGED **COOKIE SHARE** DIRECT SHIP

REFINE SEARCH

Apply Search Parameters

2 Results

Search By: All Keyword:

From:  To:  Apply

Cases  Packages  Cases/Packages

Action: Select Apply

DATE	ORDER #	TYPE	TO	FROM	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	STATUS	TOTAL	TOTAL \$
9/15/2017	275	COOKIE_SHARE	102	102	60	0	0	0	0	0	0	0	0	0	SAVED		
9/28/2017	381	COOKIE_SHARE	102	102	65	0	0	0	0	0	0	0	0	0	SAVED	65	260.00

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Export to Excel

Summary

CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	PACKAGES	TOTAL \$
125	0	0	0	0	0	0	0	0	0	125	500.00

Click the Arrow for More!



# Congratulations

**You are now ready to Manage Orders**