Smart Cookies Managing Orders

Managing Orders

1. Login to 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

Hover over the Orders Tab, click on Manage Orders

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

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

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

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

Manage Orders Bottom Half of Grid

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

Manage Orders – Initial Order

The Initial Order is the first troop order that will be picked up at initial delivery
o To view the Initial Order, click on Initial and then click Apply Search Parameters.

o The Transaction will appear showing the following information:

   o Date the Initial Order was entered

   o Order #

   o Type of Transaction

   o Troop Number receiving the order

   o The quantity of each variety

   o 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.

   o The Total in Quantity and Dollar Value

   o 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 Order

- 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 – Transfer Orders

o 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.

o The Transactions show the following information:

  o Date the Transfer transaction was entered

  o Order #

  o Type of Transfer – G2G, G2T, T2G, T2T, T2C, C2T,

  o Who received the Transfer

  o Who the Transfer is from

  o The quantity of each variety

  o The Total in Quantity and in Total Dollar Value

o Cupboard to troop transactions will be view only. Troop may edit or delete transfers they have created – for instance troop to girl.

o There can be multiple pages of Transactions, use the number tab on the bottom to click to the next page

o The chosen transaction(s) can be viewed in an Excel Spreadsheet

Manage Orders – Transferred Orders Screen View

Manage Orders – Cookie Share Order

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

o To view the Cookie Shares, click on the filter option and then click "Apply Search Parameters" and the order will appear on the screen

o The Transaction will show the following information:
- o Date the Cookie Share order was entered or edited
- o Order #
- o Type of Transaction
- o Troop number associated with Transaction
- o The total quantity of Cookie Shares orders.
- o Status of the Order - saved
- o The Total quantity and Total Dollar Value
- o 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

ABC BAKERS

Congratulations

You are now ready to Manage Orders