Unit Scout List

SCOUTS Menu

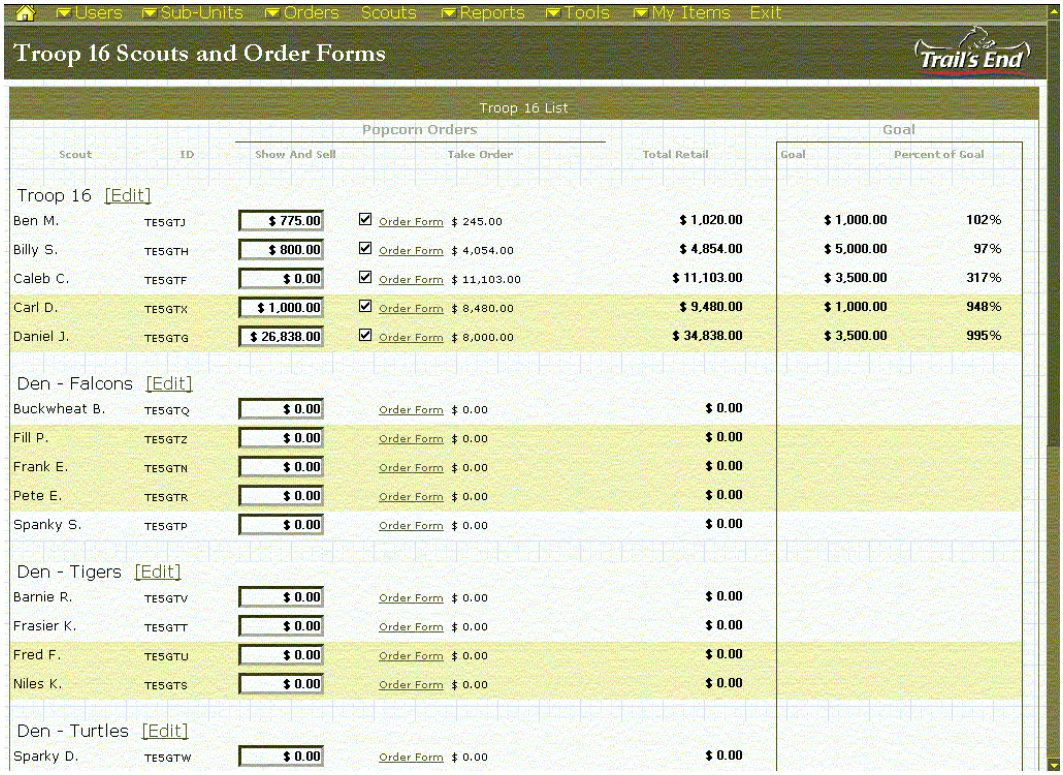
This menu bar choice opens a page on which you can **add Scouts** to your Unit, **edit Scout information**, **set and review Scouts' selling goals**, **review Scout orders**, and **allocate earnings** to individual Scouts from Unit sales events.

Adding Scouts

To add Scouts to your Unit or Sub-Unit:

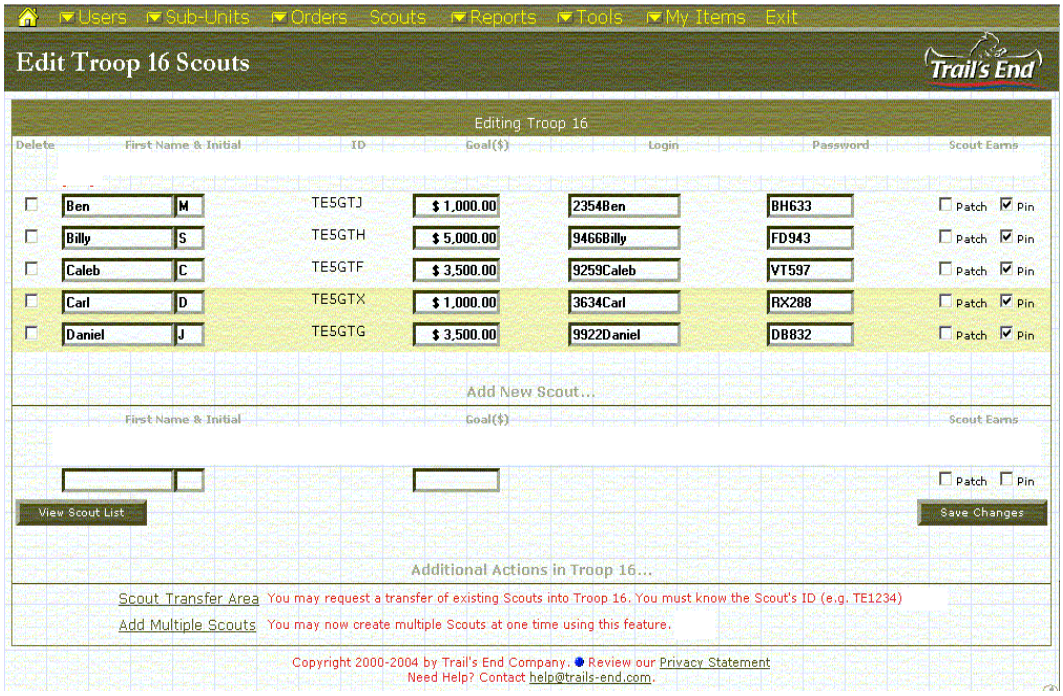
1. On the menu bar, **click Scouts.**

   The system displays the Scouts page.



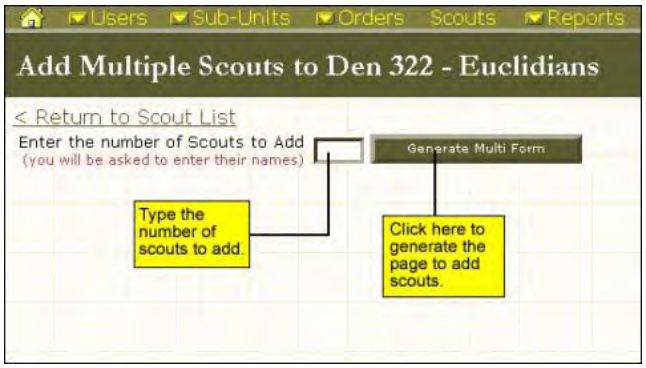
2. In the line for your Unit or Sub-Unit to which Scouts will be added, **click [Edit].**

   The system displays the Edit Unit page.



3. At the bottom of the page, **click Add Multiple Scouts**.

   The system asks how many Scouts to add:



4. Generate the Add Multiple Scouts form page:
   - In the box, **type the number of Scouts you want to add**.
   - **Click**

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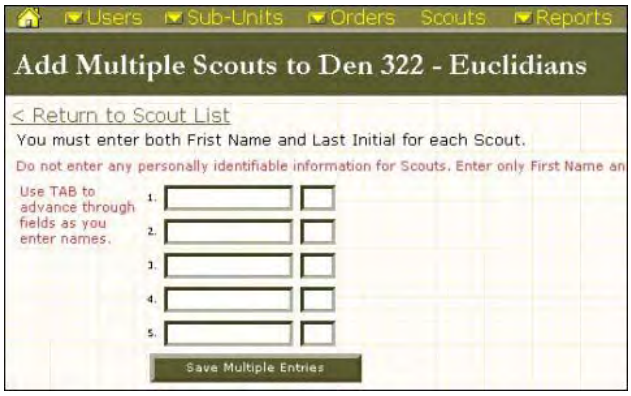
The system generates the form to add Scouts:



5. **Add Scout information:**
   - **Type the Scouts; first names** in the larger boxes.
   - On the same line, **type the Scouts' middle initials** in the smaller box.
   - Follow the same steps to add more Scouts as needed.
   - **Click**

The system saves your new Scout information.

Transferring a Scout to Your Unit

You can request that Scouts in your council's other Units be transferred into your Unit. If the administrator of the requested Scout's current Unit does not disapprove within a given time period (set by your council), the Scout is transferred.
Before you can request that a Scout be transferred to your Unit, you must have the Scout's ID number for The system (i.e., TE11111).

To request that a Scout be transferred to your Unit:

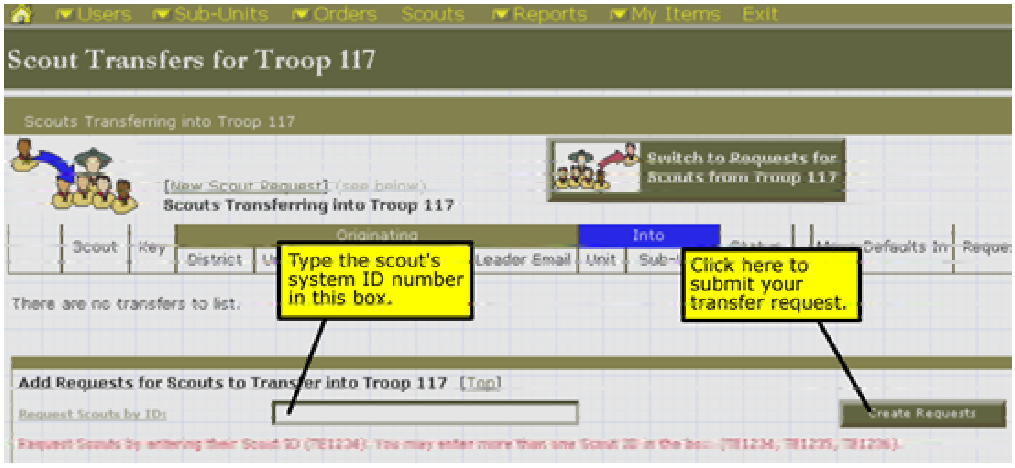
1. On the menu bar, **click Scouts.**

   The system displays the Scouts page.

2. At the bottom of the page**, click Scout Transfer Area**.

3. From the resulting page, **Click**

   The system displays the Scout Transfers page



4. **Request a Scout:**
   - In the Request Scouts by ID box, **type the Scout's system ID.**
   - **Click**

.

   The system submits your transfer request.

Approving/Disapproving a Scout Transfer

If a Scout in your Unit has been requested by another Unit, you can approve or disapprove the transfer.

To approve or disapprove a transfer request:

1. On the menu bar, **click Scouts**.

   The system displays the Scouts page.

2. At the bottom of the page, **click Scout Transfer Area**.

   The system displays the Scout Transfers page

3. Approve or disapprove the transfer:
   - **To approve** the transfer, **click Yes - Let [Scout] Move**.
   - **To disapprove** the transfer, **click No - Keep Scout**.

Reviewing/Editing Scout Information

To review or edit Scout information:

1. On the menu bar, **click Scouts**.

   The system displays the Scouts page.

2. **In the line for your Unit or Sub-Unit, click [Edit]**.

The system displays the Edit Unit page

3. If needed, edit Scout information:
   - **To delete a Scout, check the Delete check box** at the left end of the appropriate line.
   - **To add or change a Scout's sales goal, type the desired amount in the Goal ($) box**. Use only digits (0-9) and periods; do not use commas or dollar signs.
4. **Click**

.

   The system saves your changes.

Reviewing Scout Orders

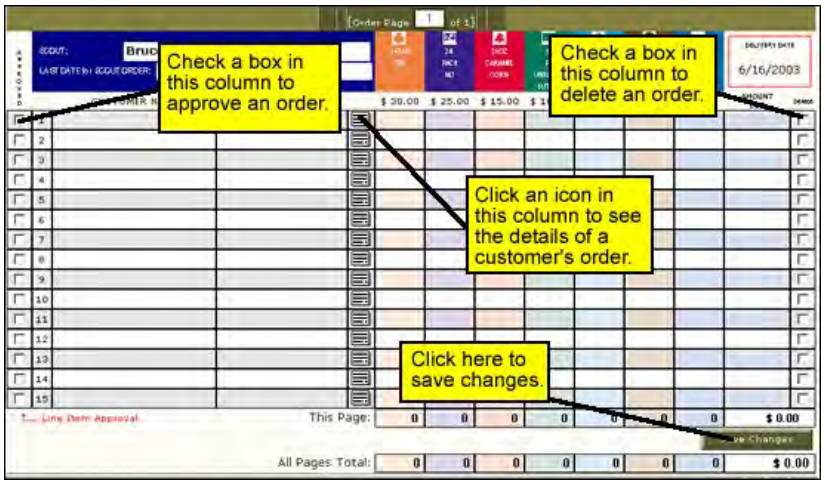
To review or edit Scout Orders:

1. On the menu bar, **click Scouts**.

   The system displays the Scouts page.

2. In the line for the Scout, **click Order Form**.

   The system displays the Scout's current order form



3. **To view details of a customer's order:**
   - **Click the order form icon in the middle of the line for the customer.**
   - When finished viewing the order details, click your browser's Back button to return to the Scout's orders.

4. If desired, **edit the Scout's orders:**
   - **To approve** a customer's order, **check the Approved check box** at the left end of the line for the customer.
   - **To delete** a customer's order, **check the Delete check box** at the right end of the line for the customer.
   - To change quantities in a customer's order line, click in the column for a product, delete the old quantity, and type the new quantity.
   - To save your changes, **click**

Allocating Earnings to Scouts

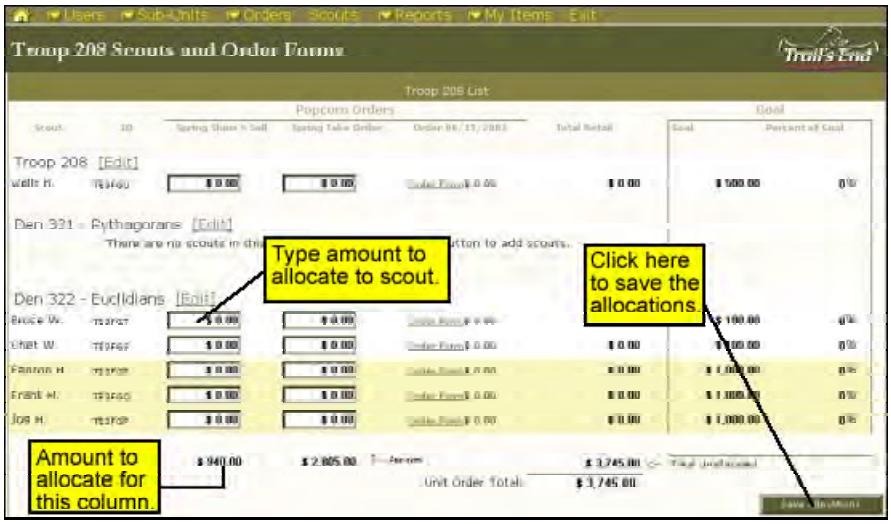
When you have a sales event (such as table at a basketball game) with multiple Scouts selling popcorn, **you can allocate total sales between Scouts who participate**. For example, suppose that total sales for a four-hour event were $1,000. Of your Scouts, Chet and Joe worked the entire four hours, while Matt worked only two. You could then allocate credit for the $1,000 by the amount of time each worked. Out of 10 Scout-hours worked at the event:

- Chet worked four hours, or 40%, and gets credit for $400.
- Joe worked four hours, or 40%, and gets credit for $400.
- Matt worked two hours, or 20%, and gets credit for $200.

To allocate earnings to Scouts

1. On the menu bar, **click Scouts.**

   The system displays the Scouts page



2. In the line for a Scout, **locate the column for the sales event.**
3. In the event column's box for the Scout, **type the amount to allocate**.
4. Click the mouse anywhere outside the event box.

   The system updates the allocated amounts.
5. **Repeat steps 2-4 to allocate amounts to other Scouts** as needed.
6. **Click** Save Allocations.

   The system saves your changes.