Introduction

The Popcorn Sales System makes it easy for you to manage your Trail’s End Popcorn Sale using a convenient, web-based platform. Using this platform, you can:

- Order Popcorn
- Setup delivery locations, order types and forecasted orders
- Setup commissions to Units and invoicing for popcorn sales
- Add Popcorn System Users to Districts and Units
- Manage your popcorn sale inventory and payments from Units
- Print packing slips, invoices and reports
- Track your Council’s online sales

Your Trail’s End Sales Manager will help you setup your initial account and permissions in the Popcorn System. Users with administrative access (Leaders) will be able to change data in the system (add, edit or delete). Read-only users (Members) can mostly view data in the system, and manage their own personal account information. The menus and pages you see when you are logged into the Popcorn System are determined by your role and your organization responsibility.

If you have any questions, reach out to your Trail’s End Sales Manager or send us an email at help@trails-end.com.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>2</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>3-4</td>
</tr>
<tr>
<td>Council Checklist</td>
<td>5-7</td>
</tr>
<tr>
<td>Logging In</td>
<td>8-9</td>
</tr>
<tr>
<td>Council Homepage</td>
<td>10-12</td>
</tr>
<tr>
<td>- Select a Sales Cycle (Available Period)</td>
<td>11</td>
</tr>
<tr>
<td>- Select a User Role</td>
<td>12</td>
</tr>
<tr>
<td>Manage Your Profile</td>
<td>12-14</td>
</tr>
<tr>
<td>District and Unit Information – Creating, Editing, Viewing and Deleting</td>
<td>15-27</td>
</tr>
<tr>
<td>- Manage Districts</td>
<td>15-18</td>
</tr>
<tr>
<td>- Manage Units</td>
<td>19-25</td>
</tr>
<tr>
<td>- Move Units</td>
<td>26-27</td>
</tr>
<tr>
<td>Users – Creating, Editing, Viewing, and Deleting from Council</td>
<td>28-43</td>
</tr>
<tr>
<td>- Manage Council Users</td>
<td>28-31</td>
</tr>
<tr>
<td>- Manage District Users</td>
<td>32-36</td>
</tr>
<tr>
<td>- Manage Unit Users</td>
<td>37-42</td>
</tr>
<tr>
<td>- Resend Login Information</td>
<td>43</td>
</tr>
<tr>
<td>Unit Commitment Tracker Instructions</td>
<td>44-56</td>
</tr>
<tr>
<td>Assigning and Updating a User’s Roles</td>
<td>57-60</td>
</tr>
<tr>
<td>Manage Delivery &amp; Distribution Locations</td>
<td>61-70</td>
</tr>
<tr>
<td>- Manage Delivery Locations</td>
<td>61-65</td>
</tr>
<tr>
<td>- Manage Distribution Locations</td>
<td>66-69</td>
</tr>
<tr>
<td>- Approve &amp; Unapprove a Distribution Location</td>
<td>70</td>
</tr>
<tr>
<td>Assign Units to Delivery Locations</td>
<td>71</td>
</tr>
<tr>
<td>Edit Order Types (Forecasted Orders)</td>
<td>72-74</td>
</tr>
<tr>
<td>Council Pricing and Product Availability for Unit Sales</td>
<td>75</td>
</tr>
<tr>
<td>Setup Unit Commission Structure</td>
<td>76-77</td>
</tr>
<tr>
<td>Assign Unit Commissions</td>
<td>78</td>
</tr>
<tr>
<td>Record Unit Payments, Credits and Debits</td>
<td>79-80</td>
</tr>
</tbody>
</table>

3
• Record Payments from a Unit
• Record a Debit or Credit for a Unit

Adjust Council Inventory………………………………………………………………. 81

Order Popcorn....................................................................................................82-90
  • Create New Orders for Units.................................................................82-83
  • Review Unit Orders.............................................................................83-84
  • Approve Unit Orders...........................................................................84-85
  • View a Unit’s Invoice..........................................................................85-87
  • Email Invoices Functionality...............................................................87-88
  • Place a Forecasted Council Popcorn Order.......................................88-89
  • Explaining the Order Screen.............................................................90

Place an Unforecasted, Small Popcorn Order...............................................91

Third Party Prize Ordering...............................................................................92

Reports............................................................................................................93-94
Council Checklist

Use the Checklist below as a guide for administrating your Council’s Popcorn Sale. For step by step instructions, refer to the Popcorn System Council Manual available for download in the Popcorn System.

1. Create Districts, Units and Users
   (Districts & Units Menus)
   • Maintain your Districts, Units and Users anytime.

2. Set Council Campaign (Sales Manager Only)
   (Campaigns Menu)
   • Create the campaign and set the selling period for a Council (i.e. Fall 20XX)

3. Select Available Products (Sales Manager Only)
   (Inventory Menu)
   • Select the products available to a Council for a given Council Campaign

4. Define Your Order Types Parameters by Forecasted Delivery Date (Sales Manager Only)
   (Order Types Menu)
   • Name Forecasted Order Dates
   • Assign Order Type by Forecasted Order Date (i.e. Show N Sell, Take Order, etc.)
   • Set Unit Ordering Dates
   • Allow Scout Orders (optional – typically used for Take Order)
   • Allow App Orders
   • Set Case or Container Unit Ordering
   • Set Override Base Commission (optional)

5. Set Council Product Pricing and Availability
   (Products Menu)
   • Assign Products Available by Order Type
   • Set Product Pricing by Order Type
   • Set Display Order by Order Type

6. Manage Delivery Locations and Distribution Sites
   (Delivery Locations Menu)
   • Create / Edit Delivery Locations (Where Trail’s End Delivers)
5. Assign Units to Delivery Locations and Distribution Sites

(Delivery Locations Menu)

- Assign Units to Distribution Locations (Where Units Pick-up Products)

6. Setup Unit Commissions

(Commissions Menu)

- Choose Retail or Net Billing
- Enter Base Commission Percentage
- Select Prize Vendor
- Select Prize and Cash Options
- Create Custom Incentives

7. Assign Unit Commissions

(Commissions Menu)

- Select Cash Option for Units Instead of Prizes (if offered)
  - Unit Leaders can also select cash option from their account
- Assign Custom Incentives to Units (When earned by Units)

8. Create, Review and Approve Unit Orders

(Unit Orders Menu)

- Approve or Enter Unit Orders, which totals what is needed to fill all of your Unit orders in your Council Order Screen
- Prior to final Council Order, enter any adjustments to Unit orders as necessary

9. Create and Place Council Order

(Council Orders Menu)

- Reduce/Increase Council order by adjusting the order quantity
- Increase Council order for Pallet or Layer price advantage or to create excess for additional product inventory

10. Make Unit Order Adjustments

(Unit Orders Menu)

- After the Council order has been placed, adjust unit orders to reflect additional sales (subtracts from Council inventory) or product returned to units (augments Council inventory)
11. Record Unit Payments and Adjustments

(Payments Menu)
- Use the Make Payment function to record Unit Payments
- Use the Debit/Credit option for corrections, additional charges, discounts, online sales credits, and incentives for Units
- Download and Print a Unit Invoice

12. Manage Council Inventory

(Inventory Menu)
- Make adjustments to Council inventory for lost, found or damaged products

Scout Orders

- Scout Orders can be submitted two ways
  - Manually entered by Unit Leader on Scouts Screen
  - Via the Trail’s End Take Order App – Orders populate automatically

Before Orders can be placed, and some tasks on this check can be completed, the following must be completed by your Trail’s End Sales Manager:

1. Create a Council Campaign
2. Set-up Order Types (forecasted delivery dates)
3. Assign Products Available to your Council
Logging In

1. Go to Scouting.Trails-End.com in your internet browser (Firefox and Chrome are preferred).

2. Type your Username and Password into the respective fields (if you do not have an account, please contact a Council admin user in your organization or your Trail’s End Sales Manager).

3. Click the Sign In button
4. If you have forgotten your Username or Password, click the Need Help? link and follow the prompts to have your Username or Password emailed to your email address on record.
Council Homepage

Your Council homepage has everything you need to setup your Council’s sale. The links in the top navigation are in order from left to right to easily guide you through the process of getting ready to order Trail’s End Popcorn.

The sidebar navigation will continue to be populated with quick, helpful links and will become more robust over time. Your council dashboard will provide you with real-time sales metrics on your popcorn sale.
Select a Sales Cycle

1. Upon logging in, double check to make sure that the available period is set to the current year (first dropdown box). The system is set to automatically default to the current fundraising sales cycle and campaign.

2. If you would like to look at previous years’ information, you can change the fundraising sales cycle and campaign by clicking on the dropdown box.
Select a Role

1. Depending on your access in the system, you may be assigned to one or many roles (i.e. Unit leaders can order popcorn for more than one unit). To switch between roles, click on the third dropdown box to switch between your unit accounts.
2. Select the role in which you want to work. The role can be switched at any time during your session.

Manage Your Profile

View Your Account Profile

1. In the top right corner, click the white circle to display a drop-down list of options.
2. Click the My Profile link to view your account details and your role(s) within the system.
Edit Your Profile

1. Once in your My Profile, click **Edit** button (green circle with pencil)
2. Make any necessary changes to your account details, including **updating your password**, by changing the text in the editable fields, and click the **Save** button (green circle with checkmark)
3. To leave with page without saving changes, click the **Cancel** button (red circle with X)
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FirstName</td>
<td>Ted</td>
</tr>
<tr>
<td>Suffix</td>
<td>Jr</td>
</tr>
<tr>
<td>Address</td>
<td>4456 S. Ferry Way Rd.</td>
</tr>
<tr>
<td>City</td>
<td>Whitewater</td>
</tr>
<tr>
<td>State</td>
<td>Indiana</td>
</tr>
<tr>
<td>Zip</td>
<td>46276</td>
</tr>
<tr>
<td>Phone</td>
<td>260-446-1004</td>
</tr>
</tbody>
</table>
Create a District

1. From the Council homepage, click the Districts button on the top navigation.
2. On the Districts page, click the New District button to open a blank new district form.
3. Complete the New District form with the appropriate information, and then click the Green Checkmark button in the top right corner to save your new district, or click the Red X button to go back without saving.
Edit a District

1. From the Districts page, click the **Edit** button (square pencil symbol) on the right-hand side next to the district you intend to edit. An editable form will appear with the details of the current district. Make edits as needed and click the **Green Checkmark** to save your changes, and return to the district page, or click the **Red X** button to go back without saving.
View a District

1. From the Districts page, click the View button (magnifying glass symbol) on the right-hand side next to the district you intend to view.
2. You will be taken to a District Detail page which also has links to the district’s Contact List, as well as all of the Units associated with the district.
Delete a District

1. From the Districts page, click the **Delete** button (trashcan symbol) on the right-hand side next to the district you intend to delete.
2. A pop-up will appear asking to confirm your decision to delete, or to cancel the action. Click **OK** to delete, or click **Cancel** to go back without saving.

*Please note that deleting a district cannot be undone. Be sure to move all active users to new districts before using the delete function. You will no longer be able to view historical sales information once deleted.*
Create a Unit

1. From the Council homepage, click the **Districts** button on the top navigation.
2. On the Districts page, click the **View** button (magnifying glass symbol) next to the district in which you want to add a new Unit.
3. From the District Details page, click the **Units** link to display the list of Units in that district.
4. In the left corner of the Units page, click the **New Unit** button to open a blank new unit form.
5. Complete the new unit form with the appropriate information, and click the **Green Checkmark** to save, or click the **Red X** button to go back without saving.
Edit a Unit

1. From the Council homepage, click the Districts button on the top navigation.
2. On the Districts page, click the View button (magnifying glass symbol) next to the district in which you want to view.
3. From the District Details page, click the Units link to display the list of Units in that district.
4. From the Units page, click the Edit button (square pencil symbol) on the right-hand side next to the Unit you intend to edit.
5. An editable form will appear with the details of the current Unit. Make edits as needed and click the Green Checkmark to save your changes, and return to the Unit page, or click the Red X button to go back without saving.
View a Unit

1. From the Council homepage, click the **Districts** button on the top navigation.
2. On the Districts page, click the **View** button (magnifying glass symbol) next to the district in which you want to view.
3. From the District Details page, click the **Units** link to display the list of Units in that district.
4. From the Units page, click the **View** button (magnifying glass symbol) on the right-hand side next to the Unit you intend to view.
5. You will arrive at the Unit Homepage
Delete a Unit

1. From the Council homepage, click the Districts button on the top navigation.
2. On the Districts page, click the View button (magnifying glass symbol) next to the district in which you want to view.
3. From the District Details page, click the Units link to display the list of Units in that district.
4. From the Units page, click the Delete button (trashcan symbol) on the right-hand side next to the Unit you intend to delete.
5. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.

*Please note that deleting a unit cannot be undone. Be sure to move all active users to new units before using the delete function. You will no longer be able to view historical sales information once deleted.
### Trail's End Popcorn Sales System

**Council Reference Guide**

**Login at Scouting.Trails-End.com**

---

**Alex's Order Testing District**

<table>
<thead>
<tr>
<th>District</th>
<th>Order Testing Unit</th>
<th>Troop 60</th>
</tr>
</thead>
</table>

**Search Filter:** Enter term here...

**New Unit**

**Export to Excel**

**Move Units**

---

**Are you sure you want to delete this Unit?**

**CANCEL**  **OK**
Moving a Unit

1. From the Council homepage, click the **Districts** button on the top navigation.
2. On the Districts page, click the **View** button (magnifying glass symbol) next to the district in which you want to view.
3. From the District Details page, click the **Units** link to display the list of Units in that district.
4. From the Units page, click the **move** button on the right-hand side next to the Unit you intend to move.
5. After you have checked the **move** box, click on the **Move Units** button in the top right-hand corner.
6. A pop-up box will appear and you can click on the drop-down box to select the new district you would like to move your selected units to.
7. Select the district, then click **move units**.
Users – Creating, Editing, Viewing and Deleting from Council

Create a Council User

1. From the Council homepage, click the Contacts tab.
2. Once on the Contacts tab, click the New User link in the top left corner of the contact list.
3. Complete the New User form, and click the Green Checkmark button to create a new user, or click the Red X button to go back without saving.
Edit a Council User

1. From the Council homepage, click the **Contacts** tab.
2. Once on the Contacts tab, click the **Edit** button (square pencil symbol) next to the Council user you wish to edit.
3. An editable form will appear with the details of the Council User. Make edits as needed and click the **Green Checkmark** to save your changes, or click the **Red X** button to go back without saving.
View a Council User

1. From the Council homepage, click the **Contacts** tab.
2. Once on the Contacts tab, click the **View** button (magnifying glass symbol) next to the Council user you wish to view.
3. The details page of the Council User will appear to view the user’s information and their assigned roles.
Delete a Council User

1. From the Council homepage, click the Contacts tab.
2. Once on the Contacts tab, click the Delete button (trashcan symbol) next to the Council user you wish to delete.
3. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.

*Please note that deleting a user cannot be undone.*
Create a District User

1. From the Council homepage, click the Districts tab.
2. Once on the Districts tab, click the View button (magnifying glass symbol) next to the district in which you intend to create the user.
3. From the District page, click the Contacts tab, then click the New User button.
4. Complete the New User form, and click the Green Checkmark button to create a new user, or click the Red X button to go back without saving.
Edit a District User

1. From the District page, click the Contacts tab, then click the Edit button (square pencil symbol) next to the district user you wish to edit.
2. An editable form will appear with the details of the District User. Make edits as needed and click the Green Checkmark to save your changes, or click the Red X button to go back without saving.
View a District User

1. From the District page, click the **Contacts** tab, and then click the **View** button (magnifying glass symbol) next to the District user you wish to view.
2. The details page of the District user will appear to view the user’s information and their assigned roles.
Delete a District User

1. From the District page, click the Contacts tab, and then click the Delete button (trashcan symbol) next to the District user you wish to delete.
2. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.

*Please note that deleting a user cannot be undone.*
Create a Unit User

1. From the Council homepage, click the **Districts** tab.
2. Once on the Districts tab, click the **View** button (magnifying glass symbol) next the district in which you intend to view.
3. From the District page, click the **Units** tab, and then click the **View** button (magnifying glass symbol) next to the unit which you intend to create a new user.
4. From the Units home screen, click the **Contacts** tab, then click the **New User** button.
5. Complete the New User form, and click the **Green Checkmark** button to create a new user, or click the **Red X** button to go back without saving.
Edit a Unit User

1. From the Unit home screen, click the Contacts tab, then click the Edit button (square pencil symbol) next to the unit user you wish to edit.
2. An editable form will appear with the details of the District User. Make edits as needed and click the Green Checkmark to save your changes, or click the Red X button to go back without saving.
**View a Unit User**

1. From the Unit page, click the **Contacts** tab, and then click the **View** button (magnifying glass symbol) next to the Unit user you wish to view.
2. The details page of the Unit user will appear to view their information and their assigned roles.
Delete a Unit User

1. From the Unit page, click the **Contacts** tab, and then click the **Delete** button (trashcan symbol) next to the Unit user you wish to delete.
2. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.

*Please note that deleting a user cannot be undone.*
Resend Login Information Button

1. From the Unit home screen, click the **Contacts** tab, then click the **Resend** button under the email login column next to the user that you want to resend to
2. This action is available at the council, unit, and district levels
Unit Commitment Tracker Instructions

Part I: Trail’s End Sales Manager Instructions

1. Double check to make sure that the current **2017-2018 Fundraising Sales Cycle** is set (or current year sales cycle)
2. Click the Campaigns tab in the respective Council view.
3. Click the Add Campaign button.
4. Add the description (Fall 2017), start date, and end date, then click Update.

![Add Campaign Image]

Part II: Council Instructions

The unit commitment tracker has two main functionalities: the **optional** ability to send and manage pre-made marketing emails to an uploaded list of recipients (See Appendix A for email examples) with a link to your Councils registration page, and a direct link to your Council’s registration page if you do not use the pre-made emails.
1. Double check to make sure that **2017-2018 Fundraising Sales Cycle** is set (or current year), and select the **Fall 2017** Campaign.

2. In the sidebar, select **Tools** and then click **Recruitment Tracker**.

3. Double check to make sure that the **Fall 2017** campaign is showing in the dropdown.
Initiating the Marketing Email Campaign

1. Click the Download CSV Template hyperlink to download, and add the First Name, Last Name, and Email Addresses of all your intended recipients.

![Download CSV Template](image)

2. Once all information has been added, save the file as a CSV (Comma delimited) to your desktop (or other file location of your choice).

![Save as CSV](image)

3. Once saved, click the Select files button, and select the file you want to upload. When the file name shows above the Upload files button, click the Upload files button. The file name will turn green with a successful upload.
4. Once you get the green success notification, click the Manage Recipient List hyperlink to view the records you’ve uploaded.

5. The Recruit List screen allows you to track and manage the process of sending the pre-made emails. If all records look correct, click the Back button.

6. When ready to begin the four-part email series, click the Start Email Campaign button. Emails are triggered to send at 9pm EST. When starting the email campaign, the first email will send the same day, and each consecutive email will send seven days apart.

7. To track and manage the sending process of the campaign emails, click the Track and Manage Emails button.
8. The user list in process of receiving the emails will show a Status Code of Active. A date will appear in each record after each email that is sent. To stop or resume email sends, click the checkbox next to any or all of the records and click either the **Stop Emails** or **Resume Emails** buttons.

9. To add additional recipients to the email list after the email campaign has been initialized, use the Single User Invite functionality to add individual recipients by entering the First Name, Last Name, and Email address. Once entered, click the **Add Email** button, and they user will start receiving the four part email series.

10. Each email received has a button for recipients to click that says **Register Today**. When the link is clicked, recipients are taken to a registration form. First, users must select their District and Unit from the dropdown menus.
Once those dropdowns are selected, additional questions outlined in red below will appear. Users must have completed the Kernel Information (required), and answer all questions to submit the registration form. There are optional fields for users to add information for a Co-Kernel. Once completed, users must click the **Submit button**.

11. As kernels register for the popcorn sale, the registrations will appear in the Recruit List screen. To get to the Recruit List, click the **View Unit Registrations** button.

**Step 5: Track Registered Units**

12. As the Council admin, you have the ability to edit a kernels registration details. For instance, there is an option for kernels to select “Can’t find my unit” during registration. Once you added or determined their correct unit, click the **Edit** button to not only change their unit affiliation, but also change any of their user details. Once finished editing, click the **Submit** button.
13. Also, you can link an existing user to the registration. This is optional, but click the edit button, and select an existing user from the dropdown box.

14. During the registration process, kernels are asked if they have an existing account in the Popcorn System. If yes, they are prompted to enter their username. If no, the Create button will appear next to their registration record. By clicking the Create button, a window will appear to enter a username and password for the kernel. When you hit submit, it will create
an account for the kernel in the Popcorn System, and give them a role in the unit in which they registered.

15. If a user supplies their username on the registration form, and they already have a role in the unit in which they registered, the screen will show Done next to the registration record. If they have an account in the Popcorn System, but do not have a role in the unit for which they registered, an Add Role button will appear in place of the Create button. By clicking the Add Role button, you will add that role to the kernels existing account.

Part III: Alternate Method

To use the Unit Commitment Tracker, it is not required that you use the marketing email campaign functionality. On the main registration page, there is a direct link that can be copied and pasted. This link takes kernels to the same registration page as the marketing emails. This link is specific to your Council and the Council campaign selected in the page dropdown (i.e. Fall 2017). This link can be used in your own marketing emails, or placed on your website for unit registration.
Alternate Method

If not using the commitment email campaign, share the link below with your units to register for the Popcorn Sale!

http://scouting.trails-end.com/tools/recruit/signup?council=c3e30f1f-c21c-11e6-a5eb-0632e1
Appendix A: Emails

Email 1: Fund Your Ideal Year of Scouting

Hello Brandon,

Thank you for volunteering your time & talents in Scouting. The benefits offered to the youth of today through Scouting programs & your efforts are many; however, maximizing those benefits takes planning, time, & financial resources.

Although some families can readily fund their own Scouting adventures, there are many that cannot. Using the Ideal Year of Scouting model, you can ensure that all current & future Scouts in your program have the chance to experience all the great things Scouting has to offer.

Register your Unit for the popcorn sale!
Hello Brandon,

We know that the popcorn sale can help Units like yours fund their Ideal Year of Scouting. Follow these ten steps to have a successful popcorn fundraiser:

1. Determine your Unit & Scout sales goals based on your annual budget
2. Host an awesome popcorn kick-off party to get Scouts & parents excited
3. Think of fun Unit incentives to keep Scouts engaged
4. Get Scouts to create a personalized selling webpage on Trails-End.com to earn incremental sales from friends & family
5. Schedule & sell in front of stores & high traffic areas
6. Supply order forms & product to Scouts for selling door-to-door
7. Check your popcorn inventory often
8. Check-in weekly with Scouts & parents on their sales progress
9. Reach your goal & fund your Unit’s entire year of Scouting
10. Celebrate with a year-end party

Register your Unit for the popcorn sale!
Email 3: Grow Your Sale with Online Selling

Hello Stuart,

Does your Unit want to Raise More Money in Less Time with Less Effort? Did you know that selling online...

**Is much easier & less of a commitment**
- No product to deliver
- No money to collect
- Less of a commitment
- Ability to reach more consumers

**Returns more money to Scouting**
- Units receive up to 50% of online sales
- Scouts receive 5% of online sales, over $300, on an Amazon gift card

**Has a higher average order value**
- 2016 online average order value was $62 compared to:
  - 2016 face-to-face average order value: $16
  - 2015 online average order value: $44

Selling online is easier than ever & is a great option for your Scouts to earn incremental sales by sharing their webpages with friends & family across the country. Scouts that register online accounts can sell new & exciting products all year. It’s as easy as 1-2-3!

**Step 1:** Scouts visit [Trails-End.com](https://www.Trails-End.com) & click the "Register" button to create an account.

**Step 2:** Scouts create a personalized selling webpage by writing a brief bio about their Scouting experience, setting a goal, uploading photos/videos & choosing a favorite product.

**Step 3:** Finally, Scouts share their webpage with friends & family via email, social media & text message.

Click the button below to register your Unit for the popcorn sale or let your Council know that your Unit will be selling online.

[Register Now]
Email 4: Trail’s End Scholarship – A Life Changing Incentive

Hello Brandon,

Did you know that Trail’s End offers Scouts a Scholarship Program? Scouts who sell at least $2,500 (online, face-to-face, or combination) in any calendar year receive 6% of their total sales invested in their own college scholarship account. Once enrolled, 6% of their sales each year will be added to their account. Scouts only have to hit the $2,500 minimum one time!

When the Scout is ready to attend college, they can submit for payout of the account & Trail’s End will send the funds directly to their educational institution to offset tuition, books, housing and/or other fees.

This is one of the many great benefits available to Scouts who participate in the popcorn sale.

Register your Unit for the popcorn sale today!

Register Now
Assigning and Updating User Roles

Each user in the Popcorn Selling System can be assigned to one or many roles. A role is comprised of two parts, the group (Council, District, and Unit) and the permissions (Leader or Member). A user with the permissions of a Leader has both Read and Write access, while a user with the permissions of a Member has Read-Only access.

Manage User Roles

1. Click the View button (square magnifying glass) next to the user which you intend to assign or update the role (can be a Council, District or Unit User).
2. You will arrive at the User Detail Page, and then click the **Roles** tab to manage the roles for that user.
Create a New Role

1. From the user’s Role page, click the **New Role** button
2. A pop-up box will appear. Select the permission level of the user using the Select Role dropdown box, and then use the remaining dropdowns to select the group in which the user will have permissions
   a. To add Council permissions, leave the District and Unit fields blank.
   b. To add district permissions, leave the Unit field blank.
   c. To add unit permissions, complete all dropdowns.
3. Once completed, click the **Submit** button
Edit a Role

1. From the user’s Role page, click the Edit button (square pencil symbol)
2. A pop-up will appear with a dropdown menu to Select Role, and you can choose between Leader and Member.
3. Click **Submit** to save changes
Delete a Role

1. From the user’s Role page, click the Delete button (trashcan symbol)
2. A pop-up will appear asking to confirm your decision to delete, or to cancel the action
3. Once deleted, the user will no longer have permissions to the group that were previously assigned to them
**Manage Delivery and Distribution Locations**

A delivery location (also known as a “drop site”) is the warehouse(s) where Trail’s End will deliver truckloads of product. A distribution location is where a Council will distribute the popcorn products to unit leaders, Scouts and parents. A delivery location and distribution can be the same, but quite often, a Council may spread product to multiple locations in addition to the initial Trail’s End delivery locations. Because a distribution location is created as a subordinate to a delivery location in this system, approving a distribution location will also approve a delivery location for use to assign to units.

**Create a New Delivery Location**

1. From the Council homepage, click the **Delivery Locations** tab
2. Click the **New Delivery Location** button
3. Complete the New Delivery Location form, and click the **Green Checkmark** button to create a new delivery location, or click the **Red X** button to go back without saving.
Edit a Delivery Location

1. From the Council homepage, click the **Delivery Locations** tab
2. Click the **Edit** button (square pencil symbol) next to the delivery location you intend to edit
3. An editable form will appear with the details of the delivery location. Make edits as needed and click the **Green Checkmark** to save your changes, or click the **Red X** button to go back without saving.
View a Delivery Location

1. From the Council homepage, click the Delivery Locations tab.
2. Click the View button (square magnifying glass symbol) next to the delivery location you intend to view.
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location.
Delete a Delivery Location

1. From the Council homepage, click the Delivery Locations tab.
2. Click the Delete button (square trashcan symbol) next to the delivery location you intend to delete.
3. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.
Add a New Distribution Location

1. From the Council homepage, click the Delivery Locations tab
2. Click the View button (square magnifying glass symbol) next to the delivery location you intend to view
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location
4. Click the Distribution Sites tab to view the list of distribution sites
5. Click the New Distribution Site button
6. Complete the New Distribution Location form, and click the Green Checkmark button to create a new delivery location, or click the Red X button to go back without saving.
Edit a Distribution Location

1. From the Council homepage, click the **Delivery Locations** tab
2. Click the **View** button (square magnifying glass symbol) next to the delivery location you intend to view
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location
4. Click the **Distribution Sites** tab to view the list of distribution sites
5. Click the **Edit** button (square pencil symbol) next to the Distribution Location you intend to edit
6. An editable form will appear with the details of the Distribution Location. Make edits as needed and click the **Green Checkmark** to save your changes, or click the **Red X** button to go back without saving
View a Distribution Location

1. From the Council homepage, click the **Delivery Locations** tab
2. Click the **View** button (square magnifying glass symbol) next to the delivery location you intend to view
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location
4. Click the **Distribution Sites** tab to view the list of distribution sites
5. Click the **View** button (square magnifying glass) next to the distribution site you intend to view to arrive at the details page
Delete a Distribution Location

1. From the Council homepage, click the **Delivery Locations** tab.
2. Click the **View** button (square magnifying glass symbol) next to the delivery location you intend to view.
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location.
4. Click the **Distribution Sites** tab to view the list of distribution sites.
5. Click the **Delete** button (square trashcan symbol) next to the distribution location you intend to delete.
6. A pop-up will appear asking to confirm your decision to delete, or to cancel the action.
Approve & Unapprove a Distribution Location

1. From the Council homepage, click the **Delivery Locations** tab
2. Click the **View** button (square magnifying glass symbol) next to the delivery location you intend to view
3. The details page of the delivery location will appear, along with the tab for viewing the list of distribution locations that exist under the delivery location
4. Click the **Distribution Sites** tab to view the list of distribution sites
5. Next to each distribution location is a button that says Approve. Click the **Approve** button to approve a distribution location, or click on the **Green Checkmark Circle** to unapproved a distribution location

*Approving a distribution location will allow for units to be assigned to delivery locations for ordering and distribution*
Assign Units to Delivery Locations

In order for a unit to be able to place an order, the unit must be assigned to a Delivery Location / Distribution Location for a given forecasted order date. Since all unit orders roll up to a Council order, this will indicate in the system to which Council order the unit order needs to attribute.

Assign Units to Delivery Locations

1. From the Council homepage, click the Delivery Locations tab
2. On the Delivery Locations tab, click the Assign Unit Delivery button
3. Select the District and check to make sure that the available period is set to the current year in which you want to assign units for delivery
4. A list of all active units for the district selected will appear. Assign each unit individually to a Delivery/Distribution location using the drop-down menus next to each unit, or use the Update All Unit Sites to update all units to the same location at one time (this screen auto-saves your changes)
**Edit Order Types (Sales Manager Only)**

Based upon your ordering plan, your Trail’s End Sales Manager will create Forecasted Orders, which will appear on the Order Types tab of the Council homepage. Using the functions on this tab, you can adjust the ordering parameters for each order. Below are more details about each function. The first step is double check to make sure that the available period is set to the current year. The system is set to automatically default to the current fundraising sales cycle and campaign. When finished, always be sure to hit **Save**.

### Order Type Name

The name of the order will be visible to your units, so be sure to name this something meaningful to your organization (i.e. August Order – Due 8.5.16)

### Forecasted Delivery Date

This is the date Trail’s End will deliver products to your Council warehouse(s)

### Final Council Order Date

This is the date your Council order(s) is due to Trail’s End, and is auto-calculated by the system based on your Council’s lead time set forth in the Trail’s End Distribution Procedures Manual. Ask your Sales Manager for your specific Council lead time.
Unit Order Open/Close Dates

This is the binding date range that enables and disables unit ordering. Units will be able to order within the set date range. Note: The Unit Order Close Date cannot be after the Final Council Order Date.

Case vs. Container Ordering

Although units will now always enter their order quantities in containers, this dropdown menu allows you to mandate units order only in full cases or individually by container (carton, bag, tin, box).

Allow Scout Orders Checkbox

Typically for Show N Sell orders, Councils will leave this box unchecked. Doing so will allow units to place a popcorn order without entering the number of containers sold by Scout, and enable allocation boxes for sales tracking. Typically for Take Order, Councils will check this box and require units to enter product quantities by Scout.

Allow App Order Checkbox

Checking this box will enable the Trail’s End Take Order app to create Scout orders that roll up into the unit order. More details on app ordering can be found in the app section of this manual. Always check Allow Scout Orders with app ordering.

Base Commission Override

For a campaign, the true base commission is set on the Commissions tab; however, there might be times when you might incentivize units with a higher base commission (i.e. During a late sale to sell unused inventory). The base commission override will supersede the base commission set on the commissions tab for a forecasted order. Leave this blank if you do not wish to use this function.

Order Type
Product availability, pricing and display order are now set by Order Type, and not by forecasted order. Order Types include Show N Sell, Mid Order, Take Order and Late Order.
Council Pricing and Product Availability for Unit Sales (Sales Manager Only)

A Council can setup four different Order Types (Show N Sell, Mid Order, Take Order, Late Order) that have different product availability, display order and retail pricing.

Setup an Order Type

1. From the Council homepage, click the Products tab
2. From the dropdown menu, select the Order Type (Show N Sell, Mid Order, Take Order, Late Order)
3. From the dropdown menu, double check to make sure that the available period is set to the current year (first dropdown box). The system is set to automatically default to the current fundraising sales cycle and campaign.
4. Using the checkboxes, mark the products Available for units to order
5. Change the integer values in the Display column to determine the order in which the products will display for units in the system while ordering
6. Change the integer values in the Order Type Price column (retail price) to the price at which units are to going to sell the products
7. Changes will save automatically as you exit each field
Setup Unit Commissions

For each campaign, a Council must setup a commission structure in order to bill units with Trail’s End unit invoices. There are several different factors, detailed below, that determine how a unit’s invoice is calculated. To begin, click the **Commissions** tab from the Council homepage, and then double check to make sure that the available period is set to the current year (first dropdown box). The system is set to automatically default to the current fundraising sales cycle and campaign.

**Unit Billing: Net vs. Retail**

This functionality determines how commission is calculated on the unit’s invoice. If a Council chooses the **Net Billing** option, the invoice reflects the total retail amount of the unit’s order minus the total unit commission earned. If a Council chooses the **Retail Billing** option, the unit is invoiced the full retail amount of the products ordered. Choose a method using the **Bill Units** dropdown menu.
**Base Commission**

The base commission is the percentage of retail sales that a unit is guaranteed to earn when selling popcorn. This commission is set globally in a campaign for all units. Enter an integer value in the percentage box next to **Base Commission** to set the base commission (i.e. 30).

**Cash vs. Prize: Unit Choice**

Councils that provide a prize program (Keller, National, Other) can enable a commission option that allows units to opt-in or opt-out of using the Council’s prize program. If a unit opts-out of the prize program, they are eligible for an additional commission percentage determined by the Council. Use the Active flag to enable this option for units, and enter an integer value in the percentage commission box next to Cash vs. Price: Unit Choice to set the optional cash incentive (i.e. 3).

**Custom Incentives**

There are a variety of custom incentives Councils use to reward units with additional commission opportunities (i.e. Attending the Council Kickoff). Using the + button, add additional, custom incentives that you can assign to units that earn the incentive. Type the incentive name in the box on the left, and enter an integer value in the percentage column in the amount a unit can earn from achieving the incentive.
### Assign Unit Commissions

Once you have completed setting up your overall commission structure for your units, click the **Assign Unit Commissions** button in the top right corner of the Commissions page.

Using the dropdown boxes, select the **District** and the **Campaign** in which you intend to assign commissions. This functionality allows you to assign a unique commission structure to each unit within your council for each popcorn season.

A list of the units within the district selected will appear. The base commission column will remain hardcoded with the percentage amount set of the commissions page. If enabled, a column named Cash or Prize will contain a dropdown menu. Using the dropdown menu, you can select the prize or extra commission (cash) option per unit. Additional columns will be present if you have created any custom commissions. To assign a custom commission to a unit, simply check the box for your intended unit. Lastly, the totals column will update as you change each unit’s commission options.

All changes will update unit invoices in real-time.
Record Unit Payments, Credits, and Debits

The Unit Payments tool is an accounting function Councils can use to track payments submitted by units, as well as enter debits and credits for things like online sales commissions, etc. After a unit order is approved, the amount of the invoice will be reflected in the Total Due Council and the Current Due Council.

For the following functions, select the Unit Payments tab from your council dashboard, and then select a District and a Campaign from the dropdown menus.

Enter a Payment Transaction

1. Click the Add Transaction button
2. From the Select dropdown menu, select Payment
3. Type the numerical value of the payment (do not enter a negative number)
4. Optional: type a reference number or transaction note
5. Click Save

This function will decrease the amount owed by the unit

Enter a Debit Transaction

1. Click the Add Transaction button
2. From the Select dropdown menu, select Debit
3. Type the numerical value of the payment (do not enter a negative number)
4. Optional: type a reference number or transaction note
5. Click Save

This function will increase the amount owed by the unit

Enter a Credit Transaction

1. Click the Add Transaction button
2. From the Select dropdown menu, select Credit
3. Type the numerical value of the payment (do not enter a negative number)
4. Optional: type a reference number or transaction note
5. Click **Save**

*This function will decrease the amount owed by the unit*

**View Transaction History**

1. Click the **View** button in the Transaction History column
2. A pop-up will appear with all payments, debits, and credits entered to the unit within the currently selected popcorn sale
Adjust Council Inventory

As you approve units’ orders and submit council orders to Trail’s End, the inventory function will keep a running total of what your council has ordered, and what units have ordered. This function will quickly let you know if you have over-promised product on unit orders, or if you have leftover inventory that has not been sold to units.

Outside of units taking products to sell, there may be a few instances in which a council may need to adjust their inventory, like in the cases of loss or damaged product. To account for inventory adjustments, follow these steps.

Adjust Council Inventory

1. Next to the product you intend to adjust, click the Adjust button
2. Using the Case and Cntr fields, enter a positive or negative integer to adjust accordingly
3. Select a reason code from the dropdown menu
4. Click Save or Cancel to exit without saving
Order Popcorn

The Trail's End Popcorn System efficiently aggregates orders for popcorn from the Scout level to the unit level, and from the unit level to the Council level. Councils can place one Council Order per forecasted delivery date for each approved delivery location. The tools available allow for a Council to not only capture orders, but also invoice units for popcorn and track payments.

Create New Orders for Units

1. From the Council homepage, click the Unit Orders tab
2. Click the New Unit Order button

3. Using the dropdown menus, select the District, Unit, Forecasted Order, and double check to make sure that the correct campaign is set to display the unit ordering form
4. Enter the order quantities in the Order Adj column. The Council Order column will display the final quantity of the order submitted to the Council.

5. Click Submit button to submit the order to be approved.

Review Unit Orders

1. From the Council homepage, click the **Unit Orders** tab.
2. Using the dropdown menu, double check to make sure that the correct **Campaign** is set to display the list of unit orders.
3. Once the list of unit orders is populated, click the magnifying glass next to each unit order to view the order details. *If changes are needed, adjust the order quantities and hit submit to update the order quantities.*
Approve Unit Orders

1. From the Council homepage, click the Unit Orders tab
2. Using the dropdown menu, double check to make sure that the correct Campaign is set to display the list of unit orders
3. Next to each order is a button that says Approve. After reviewing the unit order, click the Approve button to prevent the unit from making further changes to the order
View a Unit’s Invoice

1. From the Council homepage, click the **Unit Orders** tab
2. Using the dropdown menu, double check to make sure that the correct **Campaign** is set to display the list of unit orders
3. Once the list of unit orders is populated, click the **Invoice** button next to each unit order to view the order details.
4. In the top right corner, click the Download to PDF button to display the unit invoice.
## Email Unit Invoices

1. You can email invoices to primary contacts of units with the click of a button
2. Click the **Unit Orders** button from the council home screen
3. Click the **Email** button next to each unit order to single send the invoice directly to the primary contact of the unit
4. To send more than one email invoice at one time, click the checkbox next to each unit order, and then click the **Bulk Email Invoices** button to bulk send the invoice directly to all the primary contacts listed in each unit
Place a Forecasted Council Popcorn Order

- Once all unit orders are approved, click the **Council Orders** tab
- Click the **New Council Order** button

- Using the dropdown menus, double check the campaign, and set the forecasted order and the delivery location.
- Use the Layer/Pallet dropdown box to designate the ordering increments of layers or pallets.
- In the Inventory column, enter the amount of on hand inventory you want to apply to this order (use a positive integer for on hand inventory).
- Adjust the quantity in the Layer/Pallet Qty column to adjust the Total Order. Total Order is the column that tracks the final order to Trail’s End.
- Review the Surplus/Shortage column to determine any product overages or shortages.
- When finished, click the Save button to submit your order to Trail’s End for approval.
Explaining the Order Screen

- **Total Need Column**: The aggregated total of all approved unit order quantities
- **Inventory Column**: Used to adjust your on-hand inventory to decrease the order placed to Trail's End (enter a positive integer to reflect on hand inventory)
- **Layer vs. Pallet**: The Council Order is placed in either layers or pallets. The dropdown menu allows you to choose layer or pallet, and the ratio below shows the amount of cases per layer/pallet. The ratio shown is cases per layer/pallet.
- **Layer/Pallet Qty**: Used to adjust your final order quantity to Trail's End
- **Total Order**: Final order quantity submitted to Trail's End
- **Surplus/Shortage**: The positive or negative amount of product ordered above or below the number of products required to fulfill unit orders
Place an Unforecasted, Small Popcorn Order

If a council needs to place an unforecasted order, a small order (under 400 cases) can be placed through the Popcorn System. Please plan for at least 10 days for product delivery. To access the Small Order functionality, click the Council Orders tab from your council dashboard.

Place a Small Order

1. Click the New Small Order button
2. Select the current campaign from the dropdown menu, set a delivery date, and complete the address and contact fields
3. In the Order Adj column, enter the quantities for each product you want to order
4. When finished, click the Submit button
Third Party Prize Ordering

Councils have three options in regard to selecting a prize provider: Keller, National Supply, and Other. The Keller and National Supply programs enable unit leaders to click the **Prize Order** button on their unit dashboard, which takes them respectively to each program’s ordering page. Some councils may wish to restrict the prize ordering period for their units. Follow the steps below to activate/deactivate prize ordering.

**Activate/Deactivate Prize Ordering**

1. Select a prize program from the dropdown menu
2. Click the **Commissions** tab from the council home screen
3. Click the **Activate Unit Prize Ordering** checkbox to enable the prize order button on the unit dashboard
4. Unclick the **Activate Unit Prize Ordering** checkbox to deactivate unit prize ordering

*If Other is selected as the prize program, the Popcorn System will not facilitate prize ordering.*
Reports

App Orders
This date range report allows a council to download an excel output of all orders taken through the Trail’s End Take Order App.

Online Sales by Org
This date range report allows a council to download an excel output of all orders taken through the online selling system – Trails-End.com.

Users Report
This report is an excel download of all active users within the council (does not include Scouts).

Post Order Adjustments
This report is an excel download of all post order adjustment transactions (adjustments made after the Council order has been approved by Trail’s End).

Unit Packing Slip
This report generates a packing slip for each unit’s order, which can be downloaded and printed as a tool to be used for distribution. The packing slip indicates the cases and containers of each product ordered, and can serve as an acknowledgement of order pickup at distribution.

Delivery Packing Slip
The delivery packing slip report indicates the quantity of each product shipped to each delivery location, and further breaks down by quantity the amount to be distributed to units at each distribution location.

Unit Product Summary
This report is an excel download of the quantity ordered of each product by unit. This report can be run for a specific order, or for all orders during the campaign.

Unit Dollar Summary
This report is an excel download of the retail amount sold, and commission earned by unit. This report can be run for a specific order, or for all orders during the campaign.

Unit Invoice
The unit invoice can be downloaded for the whole council, by district, and by unit. The unit invoice provides order quantities, commissions, and amounts owed for all approved orders during a given campaign.
**Profit by Product**
This report is an excel download that breaks down the profitability of each product by comparing unit sales to the amount of product ordered by the council for a given campaign.

**Unit Accounts Receivable**
This report is an excel download that shows the outstanding balance of receivable owed by units to the council.

**Unit Shortage**
This report is an excel download that shows a surplus or shortage between the Scout orders entered in the Popcorn System, and the unit’s popcorn order. This report is helpful in determining if units may have submitted Scout orders, but did not submit a unit order.

**Unit Payments Log**
This report is an excel download that lists any payments, debits, or credits logged during a given campaign.

**Incremental Incentive**
This report is an excel download that provides a comparison between unit sales from two campaigns (i.e. Fall 2017 vs. Fall 2016).

**Recruit Tracking**
This report is an excel download that lists all units that have registered using the Unit Commitment Tracker.

**Scout Packing Slip**
The Scout Packing Slips indicate the amount sold by each Scout, if using the Scout Orders functionality. This tool can be used to aid product sorting and distribution of product to families.

**Scout Tracking**
This report is an excel download that provides the amount sold by Scout by order.