

How to Create a Purchase Order from Scoutbook Plus

Unit Leaders and Advancement Chairs with Edit Advancement permissions (Found on the Permissions Manager) can accomplish the below tasks. Login to advancements.scouting.org

1. Head to the Unit Page and select Advancements from the two tabs that display. Then select To Purchase.

My Organization

Crew 55 SCCC Camping Committee FAMILY

Council: Silicon Valley Monterey Bay
District: Quicksilver
Chartered Organization: SCCC Camping Committee

Roster Advancements

Search by Name or Member ID

Step 1
Check Items and add to a purchase order (your shopping list). A purchase order must be open in Step 2 to add items.

Search by Name or Member ID or Description

	Name ↑↓	Member ID	Item
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- a. You will need to check that the scout has been selected for APPROVED and recorded for the advancements to show in Purchase

2. Select all or select individual checkboxes for the advancements you are purchasing

☐	Peter	Award	Eagle Palm Pin #3 (Silver) <small>Marked Approved by Joanna Perez on 03/22/2023</small>
☒	Peter	Award	Eagle Palm Pin #1 (Bronze) <small>Marked Approved by Joanna Perez on 03/22/2023</small>
☐	Peter	Award	Eagle Palm Pin #2 (Gold) <small>Marked Approved by Joanna Perez on 03/22/2023</small>

- a.
3. Select items to add to order

Step 1
Check Items and add to a purchase order (your shopping list). A purchase order must be open in Step 2 to add items.

Search by Name or Member ID or Description

	Name ↑↓	Member ID	Item	Description ↑↓	Completion date ↑↓
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+ Add items to order - Unapprove items

- a.
4. Now a Purchase Order has been made. Click View Order and then select download purchase order documents. Close Order once everything has been purchased.

Step 2
Take purchase order to local Scout Shop and obtain items. (Emailing your purchase order to your Scout Shop in advance may enable staff to pull your items ahead and can save you time. Just be sure to follow up with a phone call to make sure they received your order.)

Status: Open Purchase order #597133
Created: 2021-09-24 Total items: 9

\$ 3.59 \$ 3.59

10 / page

Close Order

Advancement Report

Add to Scoutshop.org Cart (Online)

Download Purchase Order (In-Store)

View Order Close Order

*The option to make an online purchase is only available for OPEN P

Do Not Mark the Advancements as Awarded until the items are physically handed to the Scout. Marking an item as awarded will cause those to no longer appear on Needs Purchasing and will restrict a purchase order. Scout Shops require the documentation for purchase.

For updated information, visit:

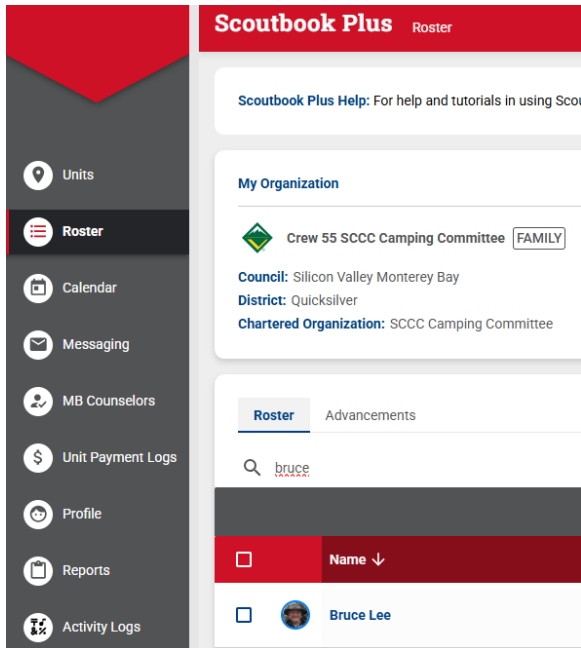
<https://help.scoutbook.scouting.org/knowledge-base/getting-a-unit-started-in-scoutbook/>

<https://help.scoutbook.scouting.org/knowledge-base/presentation-resources/>

Recording Advancements for Troops, Crews, Packs, and Ships

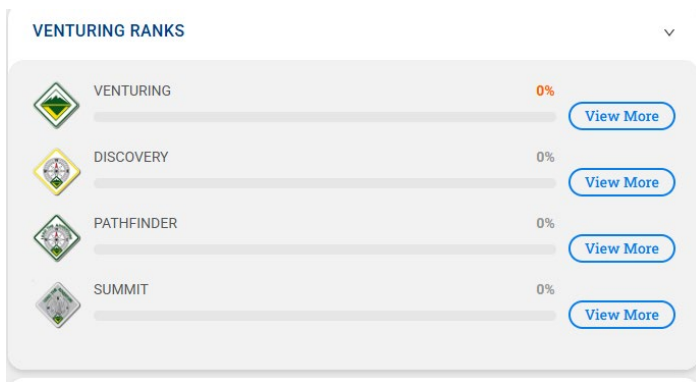
For One Scout

1. Default page after logging in will show a roster tab and advancements tab. You can select a scout to view and edit or type a name to find a particular individual faster.

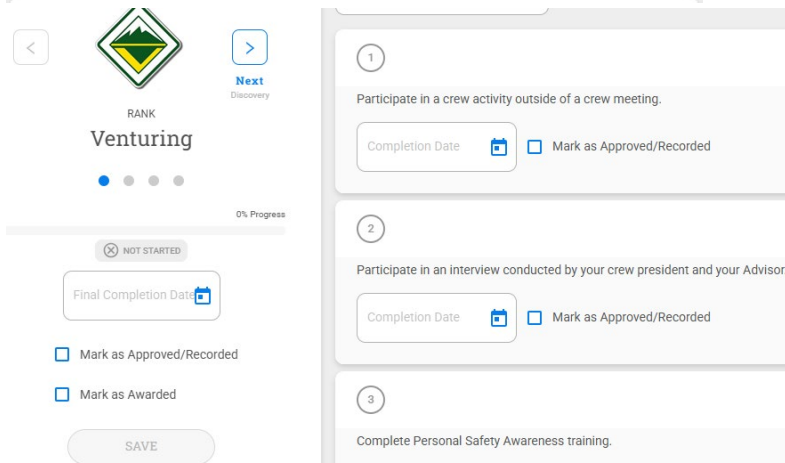


a.

2. Selecting View more when looking inside the profile can allow you to sign off on advancements and put in dates for approval.



a.



For Multiple Scouts

- 1. If you would like to fill in multiple scouts for the same advancements who happen to have earned on the same date, select the Advancements tab instead of Roster in the beginning home page
- 2. From here, select the tab To Record and select the appropriate advancement

Roster

Advancements

To Record

To Approve

To Purchase

To Award

Awarded

History

Ranks

Go To Ranks

Merit Badges

Go To Merit Badges

Awards

Go To Awards

Leadership

Go To Leadership

a.

- 3. You can select as many scouts as possible that have earned this by selecting the date, marking approved and press Apply

Select a rank

Bear

Select an adventure

Bear Habitat

Select a version

Current - 2024

Apply

Advancement Information

Highest Rank

Advancement Version

Not Eligible

Select a youth or "all" to update rank requirements.

*Youth displayed are based on the active version associated with their profile. If a youth has earned the advancement, data entered in unit quick entry will not override existing data. You can change the active version to enable viewing in unit quick entry and/or adjust dates for existing earned advancement by navigating to the youth profile and selecting the advancement, individually.

Select All

Adventure Requirements

Bear Habitat

Select all

Check out this resource page to get the most out of this adventure!

1

Prepare for a one-mile walk by gathering the Cub Scout Six Essentials and weather appropriate clothing and shoes.

2

"Know Before You Go" Identify the location of your walk on a map and confirm your one-mile route.

3

"Choose the Right Path" Learn about the path and surrounding area you will be walking on.

4

"Trash your Trash" Make a plan for what you will do with your personal trash or trash you find along the trail.

5

"Leave What You Find" Take pictures along your walk or bring a sketch book to draw five things that you want to remember on your walk.

6

"Be Careful with Fire" Determine the fire danger rating along your path.

7

"Respect Wildlife" From a safe distance, identify as you look up, down, and around you, six signs of any mammals, birds, insects, reptiles.

8

"Be Kind to Other Visitors" Identify what you need to do as a den to be kind to others on the path.

9

With your den, pack, or family, go on your one-mile walk while practicing your Leave No Trace Principles for Kids.

Comment

0/150

Completion Date

Mark as Approved

Apply

a.

Advancement Information

Highest Rank

Advancement Version

Not Eligible

Select a youth or "all" to update rank requirements.

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Select All

N/A

Not Started

First Class

v2024

N/A

Not Started

Merit Badge Req

Camping

Select all the requirements you

Select all

NOTE: The official merit

1. Do the following:

1a

Explain to your c what you should

Resources:

1b

Discuss with you activities. Tell ho

b.

- 4. This can be done with any type of recorded advancement including Merit badges, Leadership and Awards

Editing Permissions for Adults and Youth

This section is initially accessible only by Key 3 members of the unit. Committee Chair, Chartered Organization representative, or Cubmaster, Scoutmaster, Advisor, or Skipper.

Manual here:

- <https://filestore.scouting.org/filestore/pdf/Permissions%20Manager%20Helps.pdf>
- <https://help.scoutbook.scouting.org/knowledge-base/scoutbook-plus-permissions/>

Second link explains what permissions are given to existing functional roles and where to access.

1. Navigate to Permissions Manager on the left side of the Scoutbook Plus **on Computer**. Difficult on Mobile.
2. There will be a new view that showcases different tabs: Activity, Advancement, Advancement (Youth), Calendar, Calendar (Youth), Finance, Adult Leadership, Membership, Messaging (Adult or Youth), & Unit
3. By Default, only the Key 3 has permissions on. All others cannot until Key 3 designates a permission.
4. Press Apply Changes after selecting all checkboxes desired.

You may see a view with a green icon.

This is a recommendation from

Scoutbook Plus that a functional position a person may have is without their abilities. Like an advancement chair who needs access to advancements.

For more information on what the permissions do, hover over the (i) icon for more details.

Advancement ⓘ		Award - Permission to mark approved advancement "Awarded." Approve - Permission to mark advancement and youth leadership "Approved" and to edit advancement completion dates at overall or requirement level. Edit - Permission to mark advancement "Complete" and to edit youth leadership and to edit advancement completion dates at overall or requirement level. Merit Badge Counselor Search - Permission to view merit badge counselor list and download a list		
+ Select All Recommended Permissions		- Remove All Recommended Permissions		Search by Name 🔍 By Registered P
Name	Position/Roles	Award	Approve/Edit/Record	Edit
 Bruce Lee	Venturing Crew Advisor Executive Officer	☒	☒	☒
 Emile Mestressat	Committee Member	☐	☐	☐
 Bel Gonzalez	Committee Chairman Chartered Organization Rep. Committee Chair	☒	☒	☒
 Suzy Trigonis	Committee Member	☐	☐	☐

Finance ⓘ

<div><div><div><div></div></div></div><div>Select All Recommended Permissions</div></div>		<div><div><div><div></div></div></div><div>Remove All Recommended Permissions</div></div>		<div><div><div><div></div></div></div><div>Search by Name</div></div>	<div><div><div><div></div></div></div><div>By Registered P</div></div>
Name	Position/Roles	Unit Log Create/Edit	Indiv. Log Create/Edit	P.O. Create/Edit	
<div><div><div><div></div></div></div><div>Theodore Althausen</div></div>	<div>Committee Member</div> <div>Activity Approver/Creator/Remover/Editor</div> <div>Advancement Approver/Editor/Recorder</div> <div>Advancement Awarder</div> <div>Advancement Editor (Includes Youth Leadership)</div> <div>P.O. Creator/Editor</div>	Cannot Assign	Cannot Assign	<div><div><div><div></div></div></div><div></div></div>	

Activity ⓘ

Apply Changes

+ Select All Recommended Permissions		- Remove All Recommended Permissions		Search by Name 🔍	By Registered Position ▾
Name	Position/Roles	Create/Remove/Edit/Approve			
 Jim Willey	Assistant Scoutmaster Advancement Approver/Editor/Recorder Advancement Editor (Includes Youth Leadership) Calendar Editor Calendar Editor by SubUnit	☐	☒	☐	☐

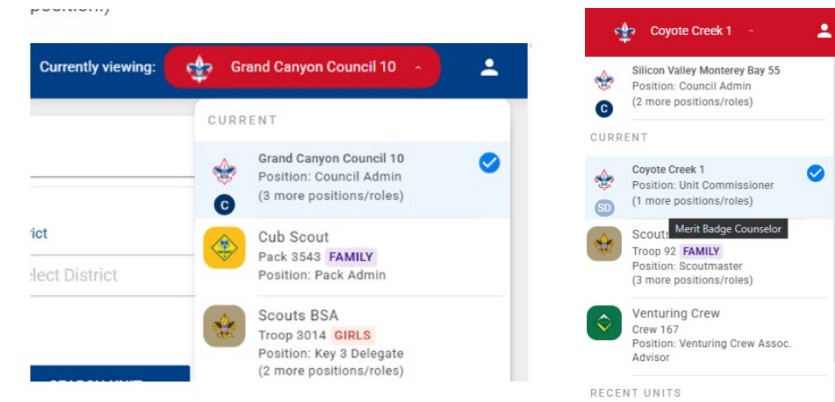
Quick Guide for Merit Badge Counselors

For updated information: [Scoutbook Plus Merit Badge Counselor Guide - Scoutbook Knowledge Base](#)

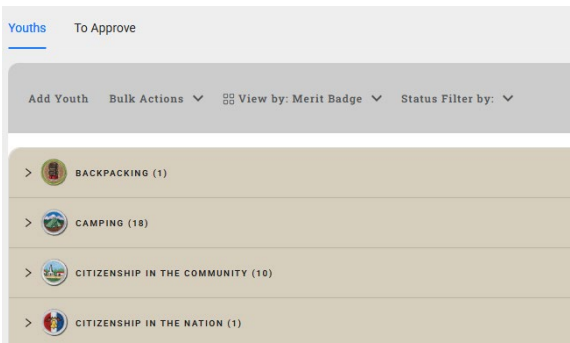
<https://help.scoutbook.scouting.org/knowledge-base/scoutbook-plus-merit-badge-counselor-guide/>

If you are an adult with multiple registrations, be sure to select the merit badge counselor view or district view if you happen to a district at large position or commissioner position.

Possible views:

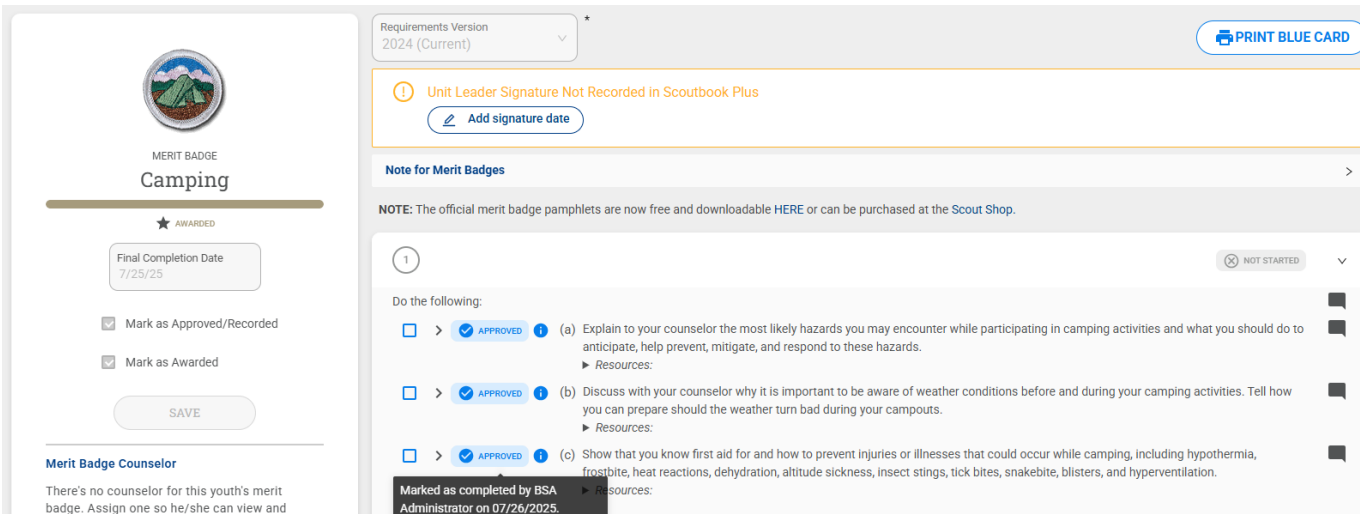


Once selected, you will see a new view of the merit badges you counsel.



Note on recording merit badges:

It can be easy to record the entire merit badge as Unit leader or Counselor approved, however, it is not recommended and may be flagged by council later on if a merit badge was signed without each individual requirement. The only exception to this is uploading records directly from an approved Scouting America High Adventure or long-term camping event as recorded from an Administrator.



<https://help.scoutbook.scouting.org/knowledge-base/getting-a-unit-started-in-scoutbook/>

There you can select the rank and generate an application:

This will start a download where a PDF autofilled with the scout's history will be automatically filled. However, if the unit leaders have not recorded all details as described, there will be blank areas for the rank advancements, merit badges, scoutmaster conference, eagle project completion or the leadership positions. Please ensure that all records to the scout are recorded accurate through Scoutbook Plus. Use of 3rd party websites are not an official method of documentation in Scouting America.

Recording leadership happens from the unit leader side under unit quick entry:

Unit Quick Entry ^

Rank Advancement

Merit Badges

Awards

Calendar Events

Health Record Dates

Swimming Classification

Scout Leadership

OA Member Data

School Information

Select a Position

Assistant Patrol Leader

6/15/26

End Date

X

+

-

Select a Position

Troop Guide

6/15/26

End Date

X

+

-

Select a Position

Assistant Patrol Leader

6/15/26

End Date

X

+

-

No leadership position

+ Add Position

Save Changes