



Quick Bites

Season Close Out – Service Unit Check list

Use these steps to close out your Cookie Program season.

1. Run the Troop On-Hand Inventory Report.
 - a. Ask Troops to distribute remaining inventory to girls.
 - b. If any Troops show a negative balance for inventory, tell them to review all transfers to girls and correct any errors.
2. Run the Direct Ship Orders report for all Troops.
 - a. Filter for order type “Troop” and ensure all orders have been distributed. Advise Troops to distribute to girls. The Service Unit Cookie Manager may also distribute by mimicking the Troop leader.
3. From the Service Unit dashboard click the link for a list of Troops with no main recognition order. Contact Troops to ask them to create the order or create an order for the Troop.
4. From the Service Unit dashboard, click the link for a list of Troops with incomplete recognition orders. Contact Troops to advise them to complete the order or edit the order to correct errors as directed by your Council.
5. If your Council offers a Troop recognition program, ensure all Troops have created an order or create for them.
6. Manage Recognition Orders
 - a. Ensure all orders are complete by checking that status shows as “Complete.”
 - b. Filter for Main Orders, click box in upper left blue bar to select all main orders.
 - c. Submit all Main Orders. Status will change to “S” when complete.
 - d. If your Council has a Troop Reward plan, filter your recognition order for Troop.
 - e. Click the box in the upper left blue bar to select all Troop orders.
 - f. Submit all Troop recognition orders. Status will change to “S” when complete.
7. Run the Recognition Order Summary by Troop report and keep to help in distributing recognitions.
8. The contact listed on the SU information page will be the person listed for shipment of rewards. If another person will accept shipment, please update the SU Information page with the new name and address.
9. Optional: Run the Troop Balance Summary Snapshot report for all Troops in your Service Unit and keep you’re your records.