## 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. From the SU Dashboard click the link showing troops with undistributed TDS (Troop Direct Ship Orders)

   a. Advise troops to distribute packages to girls to ensure that girls get credit for all troop sales.

   b. If the season end date for troops is past, the SU user may mimic the troop volunteer and distribute.

   c. Troop ship only orders may also be moved to another troop by a SU user; however, you should only do so under direction from the council. Best Practice is to distribute to girls in the troop.

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. If an alternate volunteer will accept the SU reward shipment, please be sure they are listed under the alternate contact on the SU information page. Both contacts will appear on the packing list, but shipment will be made to the alternate contact if displayed.

9. Optional: Run the Troop Balance Summary Snapshot report for all Troops in your Service Unit and keep for your records.