

# 2021 Close of Cookie Season Guide

## Troop Inventory

You'll want to make sure your On Hand Cookie Inventory is at zero. This means making sure all inventory has been transferred to girls or other troops. Your troop dashboard will tell you if you have On Hand Inventory still available to transfer.

Useful reports to help you during this process (all under the Reports tab)

- Girl Balance Summary
- Troop Balance Summary (lists all transactions/transfers of cookies)
- Transfer Order Summary (change unit of measure to packages/cases)
- Troop On Hand Inventory

Please be aware that the dashboard figures do not always update immediately, if you want to check your numbers as you're doing transfers, I'd recommend running the inventory or girl balance summary reports.

You also need to look in a couple other places to make sure all cookies have been accounted for:

### Donations:

Donations come in two forms, Girl Delivery and Direct Ship. Direct Ship are fulfilled by council and are automatically credited to the girls when a customer places the order.

Girl Delivery donations are fulfilled by your troop in one of two ways:

1. You use Troop Inventory to donate packages to the organization of the troop's choice.
  - a. To view your Girl Delivery donations:
    - i. Select Reports, then Current
    - ii. Select the Mobile and Ecard Summary Report

Girl Delivery donations get credited to girls through Troop to Girl transfer along with all other inventory. Be sure to check the Mobile and Ecard Summary Report to ensure the girls are getting full credit for all inventory sold.

2. If you don't have physical inventory, you can log a Virtual Cookie Share through your Smart Cookie Dashboard. This transfers the donation to council to fulfill while still giving a girl credit for the sale.
  - a. To log a Virtual Cookie Share:
    - i. Select Virtual Cookie Share under the Orders Tab from your troop dashboard.
    - ii. Enter the number of packages to assign from the list of girls.
    - iii. Click Save

## Troop Direct Ship Orders:

Troop Direct Ship Orders are bonus sales for your troop, similar to a booth sale. These orders could have come from customers looking to connect with troops through the Find Cookies link on the GSEP.org website. These orders have been fulfilled by the bakery; you do not need to do anything on the customer side. You do need to distribute the sale credit to your girls by following these steps:

- a. Navigate to Troop Direct Ship Orders under the Orders Tab of your troop dashboard.
- b. If orders were placed under your troop, they will be listed here.
- c. The status of un-distributed orders will say "Pending Distribution," this refers to the distribution of credit to girls, not referring to cookies.
- d. Scroll to the bottom of the page and click Distribute to Girls.
- e. Select individual girls or select to evenly distribute.
- f. Confirm distribution.

note: the transfer will appear on the girl's account as a purchase from the TCM.

## Recognitions

Troops and girls have several options of recognitions to choose from: Cumulative Prizes, Adventure Credits, Older Girl Travel Credits, and Older Girl Proceeds Plan. See page 16-17 for full descriptions for all recognition plans. If you haven't already, you should check with the girls which recognition plan they wish to use. The family will get detailed emails with how many credits were earned and information on how to redeem Adventure Credits and Older Girl Travel Credits after the close of the cookie season.

You will want to make sure the recognitions are listed correctly for each girl or the troop as a whole, if you are choosing the Older Girl Proceed Plan.

To select a plan for the whole troop:

- a. Navigate to the Troop Information page from the My Troop tab
- b. To change the entire troop to Older Girl Proceed Plan:
  - i. Under Proceed Plans, change the first drop down from Option A: Main Proceed Plan to Option B: Older Girl Proceed Plan
- c. To change the entire troop to Cumulative Prizes, Adventure Credits, or Older Girl Travel Credits:
  - i. Under the Proceed Plan Section, leave the first drop down as Option A: Main Proceed Plan
  - ii. Use the second drop down to select one of the following:
    1. Cumulative Plan (Prizes)
    2. Adventure Credits
    3. Older Girl Travel Credits
- d. To change individual girl recognitions:
  - i. Navigate to the Troop Roster under the My Troop tab

- ii. Edit each individual girl by clicking the pencil to the right of the girl line.
- iii. Use the drop down under Main Recognition Plan to select the correct recognition plan.
  1. This is also where you can ensure shirt sizes are correct for girls that have reached over 160 packages. (check with the family if you are not sure of the girl shirt size)

Next, you will need to review the Recognition Order for your troop. Recognition Orders must be reviewed before April 1<sup>st</sup>. After April 1, you will be locked out of the Recognition Order and not able to make changes.

1. Navigate to the Manage Recognition Order under the Rewards tab
2. Select the pencil icon to the right of the troop you are reviewing.
3. Each girl on your roster will be listed with their number of packages sold.
4. Review each girl by clicking the > to the right of their line.
  - a. Each line will say Unread until it is reviewed.
  - b. Double check shirt sizes are correct.
  - c. Correct or enter any missing information.
  - d. Each recognition level will have a drop down to show what prize or credit amount earned.

You should also download a copy of the Recognition Order Summary report by girl from the Report tab. You will use this to sort prizes for the girls in your troop when they arrive in May/June. You won't have access to Smart Cookie to look up this information when the prizes arrive. The Goal Getter Patch will not be listed on this report, they will come with a separate list from your SUCM.

Recognitions are shipped to your SUCM for distribution to troops. It is then the responsibility of the TCM to ensure girls receive their prizes and patches in a timely manner.

## **Sweep #3 and Troop Finances**

### **Girl Finances**

The balance Due for each girl should be \$0.00. If a girl owes the troop money for cookies, it will show under Girl Financial Responsibility tab on your dashboard page.

If a girl is owed money by the troop (a credit card transaction for cookies that she has already paid for from her personal inventory), this will show as a negative balance. You should arrange with your Treasurer or Leader to reimburse girls who are owed money.

### **Troop Finances**

You can review all credit card payments and order by navigating to Financial Transactions under the Finance tab from your troop dashboard. There are also several reports available under the Reports tab.

## **Final Sweep**

Sweep #3 will be on April 15. You should pay any remaining cookie money into your troop bank account before this date. Sweep #3 will withdraw any balance owed to council or deposit if your troop is owed money. If your troop owes council a balance, the sweep will leave your troop profit and only withdraw your balance owed.

If your troop qualified for the extra .05 cent per box from the Spring 2020 Early Bird Campaign, you will also see this with your troop profit during this last sweep.

## **Square Reimbursement**

Your troop may submit for reimbursement of your transaction fees if your Troop Per Girl Average (PGA) is over 200 packages. You can review your Troop PGA from your dashboard in Smart Cookies. Only girl who have packages sold and transferred to them will be counted in your Troop PGA. The Square Fee Reimbursement Request can be found on the GSEP.org website or at this link:

<https://www.gsep.org/content/dam/girlscouts-gsep/documents/Square%20Fee%20Reimbursement%20Form.pdf>

## **Financial Hardship**

If the troop is having trouble making sure there is enough money in the troop account to cover the final sweep, you should follow the instructions to request an extension in the Sweep Snapshot email that will go out several days before the sweep. The Sweep Snapshot email will outline what is owed by the troop.

If your troop is having trouble collecting money from a family, you may request additional funds of up to \$250 per troop from council by completing a T-5 Parent Debt Form. This form can be found on the GSEP.org website or at this link: <https://www.gsep.org/content/dam/girlscouts-gsep/documents/T-5%20Parent%20Delinquency%20Form%20%26%20Instructions%20-%20Parent%20Debt.pdf>

## **Troop Balance Summary**

One final item to take care of! Once your inventory is at zero, your balance owed is zero, recognitions are reviewed, and the final sweep is reflected, you should print a copy of your Troop Balance Summary and turn it in to your SUCM. Your SUCM will let you know the due date to hand these in by after the final sweep has been processed. All troops must submit a signed, troop balance summary report showing a zero balance to your SUCM, who will in turn submit to the Product Program Team.

## **2021 is a Wrap!!**

You made it through the 2021 Covid version of Cookie Season! This year has been full of challenges including, Covid, new system upgrades, snow, and more! Even with these challenges, we came together as a Girl Scout community and made it the best we could! The Product Program Team wants to sincerely thank you for your dedication and support of this Cookie Season, we could not have done it without you!