# UNIT TRACKING - OVERVIEW

Unit Tracking is a tool for Guiders to use to record payments and additional cookies or returns. This tool will keep track of cookie payments and facilitate registration for Cookie All Stars (when available).
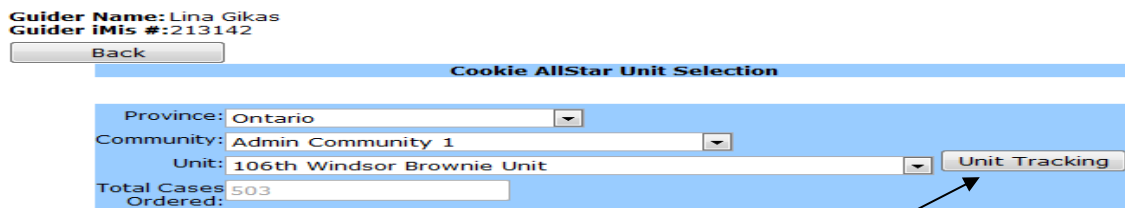
1. If the **Unit Planning** tool has been used and the Cookie Orderer forwarded the information to the Unit Tracking while ordering the cookies, all data will automatically be transferred here.

2. If the **Unit Planning** tool has **NOT** been used, the Cookie Orderer may still use this tool to track the cookie selling or financials (but all necessary information will need to be entered).



To access the Unit Tracking tool, click on the **Unit Tracking** button on the main screen. The following screen appears.
*Please note that the unit tracking tool cannot be used to place your unit's order online, this should only be used after placing your order.  This tool is also available throughout the full Guiding Year.*

# UNIT TRACKING

1. Click **Unit Tracking** button
2. Find your unit from the drop down menu and select it.



- Your unit order should show in the box called Total Cases ordered (if information has been forwarded).

- If there is no number, enter your unit order amount.

3. Click **Unit Tracking** to proceed to the next screen

If the Unit Planning tool has been used and data has been forwarded the Unit Tracking, all information will appear on the screen.



**Unit Tracking Features**

- **Total Ordered** – this box indicates your unit order placed
- **Unallocated** – this box indicates the number of cases not allocated to the girls during planning
- **Planned sales** – numbers is this column are what was entered in the Unit Planning
- **Activity** – takes you to the financial management screen for the girl. Here the Guider can record additional cases, returned cases and payments remitted by the girl/parent.
- **Group Sales** – to record cases sold as a group at a particular event(s). List each event separately.
- **Activity** – this button brings up girl's individual records
- **Remove Girl** – allows you to remove the girl from the roster list appearing on the screen. Keep in mind that removing a girl from your Unit roster on the Unit planning screen, does not remove it from the iMIS database.  By clicking the Roster button again you will brings the girl's name back to the roster.

    **NOTE:** Removing the girl from the roster on this screen, will not remove her from the roster in iMIS database. If you have a girl on the roster (or are missing a girl) that does not belong to your Unit contact your Unit Administrator.

- **Lones/Other Helper** – if you have a girl(s) from a different Unit helping with your Unit's sales you can enter her sales here. Enter the helper's iMIS number into the Girl iMIS box and press Enter. The helper's name and iMIS number will populate the boxes.
- **Cookie Transfer from other unit** – if you acquired extra cookies from another Unit, enter the date and number of cases you received from the other Unit.

When you click **Activity button**, you will see the following:

- **Case management** – here you manage the cases given to girls or/and any cases returned.
  - **Returned cases are to be added as a negative number.**
  - **Signature box** – purpose of this box is for Guider to keep track of parents confirmation received after boxes has been collected. This box does not replace the actual signature.

- **Financial management** – to enter payments received (full or partial)

**Guider Name:** Lina Gikas
**Guider iMis #:** 213142

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**Cookies Order System - Order Tracking - Activity**

**Girl iMIS #:** 974650 **Girl Name:** Emily Guthrie

**Case Management:**

| Date | Cases | Amount Owning | Signature |
|------|-------|---------------|-----------|
| May 03, 2012 | 10 | $480.00 | ☐ |
| | | | ☐ Yes |
| **Total** | **10** | **$480.00** | |

**Financial Management:**

| Date | Amount Paid |
|------|-------------|
| | |
| Total Paid | $0.00 |
| Amount Owing | $480.00 |
| **Balance** | **$480.00** |

Save and Return to Tracking    Confirmation Receipt

- **Confirmation receipt** – to receive and print confirmation receipt for the girl/parent.

  Once all information has been recorded, either save and return to the previous screen or confirm receipt.