## **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 <u>Unit Planning</u> 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 <u>Unit Planning</u> 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).

Mode:Open Campaign:Classic Year:2014		Guider Name: Test Cookie6 Unit Guider iMIS #:1117435	
	Welcome to the Cookie Ordering System		
	Order Cookies		
	Reports		
	Unit Tracking		

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* <u>after placing your order</u>. 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.

Guider Name: Lina Guider iMis #:2131	Gikas 142	
Back		
	Cookie AllStar Unit Selection	
Province:	Ontario 💌	
Community:	Admin Community 1	
Unit:	106th Windsor Brownie Unit	Unit Tracking
Total Cases Ordered:	503	

- 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.

Girl Guides of Canada - Or	der Track C	ing Province:Ontario CommunityAdmin Unit106th Guider Name:Li iMis #:2 Phone: Email:g	o Community 1 Windsor Brown ina Gikas I3142 Please updat ikasl@girlguide	ie Unit e your Phone # in iMl s.ca	s
		Girl Sal	es Roster		
	Girls iMIS	Girls Name	Planned Sales		
	1008422	Abby Stark	5	Activity Remove Gir	0
	1008442	Alison Anderson	40	Activity Remove Gir	]
	1117351	Berlyn Soulliere	23	Activity Remove Gir	
	1108528	Bianca Mijovcic	10	Activity Remove Gir	
	986849	Claire Sylvestre	0	Activity Remove Gir	0
	1013216	Dayna Davidson	5	Activity Remove Gir	
	974650	Emily Guthrie	10	Activity Remove Gir	0
	1088301	Greta Janik	0	Activity Remove Gir	
	1024598	Julia Masse	0	Activity Remove Gir	0
	1029212	Kate Stamatiadis	0	Activity Remove Gir	1
	1108453	Laura Bardwell	0	Activity Remove Gir	0
	974658	Madeline Scarfone	0	Activity Remove Gir	1
	1046161	Madelyn McGregor	0	Activity Remove Gir	n en
	178550	Rylann Lazarus	0	Activity Remove Gir	Î.
		Girl Inter Control		and solves	
		note	22102 Met.tszy	una Planna	

## 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						
Back						
Cookies Order System - Or	der Tracking - Activi	ty				
	Girl iMIS #:	974650 <b>Girl</b>	Name:Emily Guthr	ie		
	Case Management:					
	Date	Cases	Amount Owning	Signature		
	May 03, 2012	10	\$480.00	100 C		
				Yes		
	Total	10	\$480.00			
	Financial Management:					
	Date		Amount Paid			
	Total Paid		\$0.00			
	Amo	Amount Owing				
	Balance	Balance				
	Save and Return	n to Trackin	g Confirmation Re	eceipt		

• **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.