

# Popcorn System – Council Checklist

Use the Checklist below as a guide for administrating your Council's Popcorn Sale. For step by step instructions, refer to the Popcorn System Council Manual available for download in the Popcorn System.

## 1. Create Districts, Units and Users

### (Districts & Units Menus)

- Maintain your Districts, Units and Users anytime.

## 2. Set Council Campaign (*Sales Manager Only*)

### (Campaigns Menu)

- Create the campaign and set the selling period for a Council (ie. Fall 2016)
- Set the Council prize vendor selection

## 3. Select Available Products (*Sales Manager Only*)

### (Inventory Menu)

- Select the products available to a Council for a given Council Campaign

## 2. Define Your Order Types Parameters by Forecasted Delivery Date

### (Order Types Menu)

- Name Forecasted Order Dates
- Assign Order Type by Forecasted Order Date (*ie. Show N Sell, Take Order, etc.*)
- Set Unit Ordering Dates
- Allow Scout Orders (*optional – typically used for Take Order*)
- Allow App Orders\*
- Set Case or Container Unit Ordering
- Set Override Base Commission (*optional*)

*\*Always Allow Scout Orders when the Allow App Orders setting is selected*

## 3. Set Council Product Pricing and Availability (*Sales Manager Only*)

### (Products Menu)

- Assign Products Available by Order Type
- Set Product Pricing by Order Type

## 4. Manage Delivery Locations and Distribution Sites

### (Delivery Locations Menu)

- Create / Edit Delivery Locations (*Where Trail's End Delivers*)
- Create / Edit / Approve Distribution Sites (*Where Units Pick-up Products*)

## 5. Assign Units to Delivery Locations and Distribution Sites

### (Delivery Locations Menu)

- Assign Units to Distribution Locations (*Where Units Pick-up Products*)

## 6. Setup Unit Commissions

### (Commissions Menu)

- Choose Retail or Net Billing
- Enter Base Commission Percentage
- Select Prize and Cash Options
- Create Custom Incentives

## 7. Assign Unit Commissions

### (Commissions Menu)

- Select Cash Option for Units Instead of Prizes (*if offered*)
  - Unit Leaders can also select cash option from their account
- Assign Custom Incentives to Units (*When earned by Units*)

## 8. Create, Review and Approve Unit Orders

### (Unit Orders Menu)

- Approve or Enter Unit Orders, which totals what is needed to fill all of your Unit orders in your Council order Screen
- Prior to final Council Order, enter any adjustments to Unit orders as necessary

## 9. Create and Place Council Order

### (Council Orders Menu)

- Reduce/Increase Council order by adjusting the order quantity
- Increase Council order for Pallet or Layer price advantage or to create excess for additional product inventory

## 10. Make Unit Order Adjustments

### (Unit Orders Menu)

- After the Council order has been placed, make adjustments to unit orders to reflect additional sales (subtracts from Council inventory) or product returned to units (augments Council inventory)

## 11. Record Unit Payments and Adjustments

### (Payments Menu)

- Use the Make Payment function to record Unit Payments
- Use the Debit/Credit option for corrections, additional charges, discounts and incentives for Units
- Download and Print a Unit Invoice

## 12. Manage Council Inventory

### (Inventory Menu)

- Make adjustments to Council inventory for lost, found or damaged products

### Scout Orders

- **Scout Orders can be submitted two ways**
  - **Manually entered by Unit Leader on Scouts Screen**
  - **Via the Trail's End Take Order App – Orders roll up to the Scout's order**

**Before Orders can be placed, and some tasks on this check can be completed, the following must be completed by your Trail's End Sales Manager:**

1. Create a Council Campaign
2. Set-up Order Types (forecasted delivery dates)
3. Assign Products Available to your Council
4. Assign Products & Pricing to each Order Type