

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