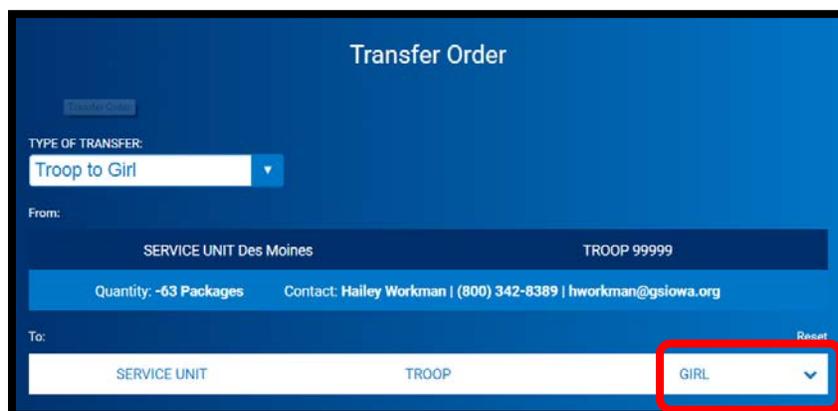# Transfers – Smart Cookies Guide

Troop to Girl Transfers (T2G)

A *Troop-to-Girl Transfer* order in Smart Cookies needs to be made by the Troop Product Manager (TPM) each time cookies are transferred to girls from troop inventory. This is how a girl receives credit for the packages she sells and it also allows the recognitions order to be built later.

1. Go to the *Orders* tab, and select *Transfer Order* from the dropdown.
2. The *Type of Transfer* defaults to *Troop to Girl*.
3. Click on the drop-down box under *To:* to select the desired girl and click *Apply*.

4. Enter the quantities in PACKAGES by variety.
   - Enter in the quantity of packages the girl sold individually under the *Packages* column.
   - Enter in the quantity of packages to girl sold at a booth under the *Booth Packages* column – do this only if you are not going to use the Smart Booth Divider to give credit.
5. You may enter in any notes as you see fit in the *Order Notes* field.
6. Click *Save.*
7. You will receive a notification at the bottom the screen that your order was successfully saved.
8. You will then have the option to print a receipt, if you would like.
9. You then may choose to *Make Another Transfer* or *Go to Manage Orders.*
10. To review your *Transfers,* go to the *Orders* tab, and select *Manage Orders.* (You can narrow down the search parameter to only show *Transfer Orders.)*

Note: All *Transfers* from troop-to-girl that are not designated "booth packages" will become the financial responsibility of the individual girl. All *Troop to Girl Transfers* will appear on the *Girl Balance Summary* report, which details how much money each girl owes her troop for cookies sold.

Troop-to-Troop Transfers (T2T)

Troops may transfer inventory to other troops if needed. A *Troop to Troop Transfer* order in Smart Cookies needs to be made by the troop **giving** the cookies. Once a *Troop to Troop Transfer* is complete, a confirmation email will be sent to the receiving troop. Cookies transferred become the financial responsibility of the receiving troop. Troops can make transfers to troops outside of their service unit if needed.

1. Repeat the steps from above to get to the *Transfer Order* screen.
2. Change the *Type of Transfer* to *Troop to Troop* from the dropdown.
3. Click on the drop-down box under *To:,* search and select the desired troop and click *Apply.*
4. Enter the quantities in PACKAGES by variety and click *Save.*
5. You may enter in any notes as you see fit in the *Order Notes* field as well as print a receipt, if you would like.
6. You will receive a notification at the bottom the screen that your order was successfully saved.
7. You then may choose to *Make Another Transfer* or *Go to Manage Orders.*
8. To review your *Transfers,* go to the *Orders* tab, and select *Manage Orders*. (You can narrow down the search parameter to only show *Transfer Orders.*)

Girl-to-Girl Transfers (G2G) - *Within* the Same Troop

Troops may need to transfer packages between girls in their troop. A *Girl-to-Girl Transfer* can be entered by the TPM. **Note:** Cookies transferred become the financial responsibility of the girl/family receiving the cookies.

1. Repeat the steps from above to get to the *Transfer Order* screen.
2. Change the *Type of Transfer* to *Girl to Girl* from the dropdown.
3. Click on the drop-down boxes under *To:* and *From:* to select the desired girls and click *Apply.*
4. Enter the quantities in PACKAGES by variety and click *Save.*
5. You will receive a notification at the bottom the screen that your order was successfully saved.

Girl-to-Girl Transfers - *Between* Different Troops

Sometimes girls give other girls cookies that are not in the same troop – for example sisters in different troops. This will call for a transfer of cookies to make sure that the proper girl (and troop) gets credit, but also financial responsibility, for the cookies. In order to do this type of transfer there is a 3-step process as we must do a *Girl to Troop, Troop to Troop,* and then *Troop to Girl Transfer.*

Step One – done by the TPM of the girl <u>giving</u> the cookies.

1. To transfer packages from one girl (Girl A) to another girl (Girl B) in a different troop, under *Orders,* select *Transfer Order* from the dropdown.
2. Change the *Type of Transfer* to *Girl to Troop* from the dropdown.
3. Click on the drop-down box under *From:* to select the desired girl and click *Apply.*
4. Enter the quantities in PACKAGES by variety and click *Save.* (This transfers the packages from the girl back to you (the troop))
5. You will receive a notification at the bottom the screen that your order was successfully saved.
6. Click *Make Another Transfer.*

Step Two –
7. Change the *Type of Transfer* to *Troop to Troop* from the drop-down.
8. Click on the drop-down box under *To:* to search for and select the desired troop and click *Apply.*
9. Enter the quantities in PACKAGES by variety and click *Save.*
10. You will receive a notification at the bottom the screen that your order was successfully saved.

Step Three – done by the <u>receiving</u> girl's TPM
11. Under *Orders,* select *Transfer Order* from the dropdown.
12. The *Type of Transfer* defaults to *Troop to Girl.*
13. Click on the drop-down box under *To:* to select the desired girl and click *Apply.*
14. Enter your quantities in PACKAGES by variety and click *Save.*
15. You will receive a notification at the bottom the screen that your order was successfully saved.
16. To review your *Transfers,* go to the *Orders* tab, and select *Manage Orders*. (You can narrow down the search parameter to only show *Transfer Orders.)*

Note: Cookies transferred this way become the financial responsibility of the girl/family receiving the cookies.

Cupboard-to-Troop Transfers (C2T)
Once your *Planned Order* is picked up and approved, it turns into a *Cupboard to Troop Transfer* in Smart Cookies, and the receiving troop will then get a confirmation email.

Note: All *Cupboard to Troop Transfers* become the financial responsibility of the receiving troop.

Troop-to-Cupboard Transfers (T2C)
These are used to indicate when product has been exchanged. These transfers will be made by the Cupboard Manager and the troop will then receive a confirmation email. See page 6 of the *2019 Cookie Program Kit* for more information about exchanging cookies.