2022-23 Girl Scout Troop Database Guide

Smart Cookies ™
POWERED BY ABC BAKERS

girl scouts
of eastern
massachusetts

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https://abcsmartcookies.com/

Gaining Access to Smart Cookies

Two forms need to be received by Council in order to activate the login email for Smart Cookies:

- Troop Cookie Coordinator Agreement
- Troop Bank Account Information Form – if turned in for the Fall Product Program, this will NOT need to be re-submitted; it will be carried over automatically into the Cookie Program

Once both forms have been received, and Council verifies your membership and background check, we will create you as a user in Smart Cookies and an automatically-generated email, from a no reply address (noreply@abcsmartcookies.com), will be sent directly to the email written on the form:

Dear Girl Scout Volunteer,

Girl Scout Cookie season is starting soon! To help you get ready for a great cookie season please set up your account and register on the ABC Smart Cookies website, click the link below to get started:

https://abcsmartcookies.com/#/registration?token=ad85629b-7ea0-416d-80e8-0b5e93a5ebb8

By registering on ABC Smart Cookies website, you will be able to complete your profile, start managing your cookie sale and have access to all of the resources available on the ABC Smart Cookies website!

Thank you,

The ABC Smart Cookies Team

This email may be promotional.

Registering to Smart Cookies

Once you click the unique link in the email, you will be sent to the following page:

After you click "Submit", a confirmation page will appear:

You've successfully registered!

Let's get started with your Girl Scout Cookie Program, Travis! Go to www.abcsmartcookies.com to login!

Logging into Smart Cookies

Click the link on the registration page (https://www.abcsmartcookies.com/) to go to the home page for the Smart Cookies System:
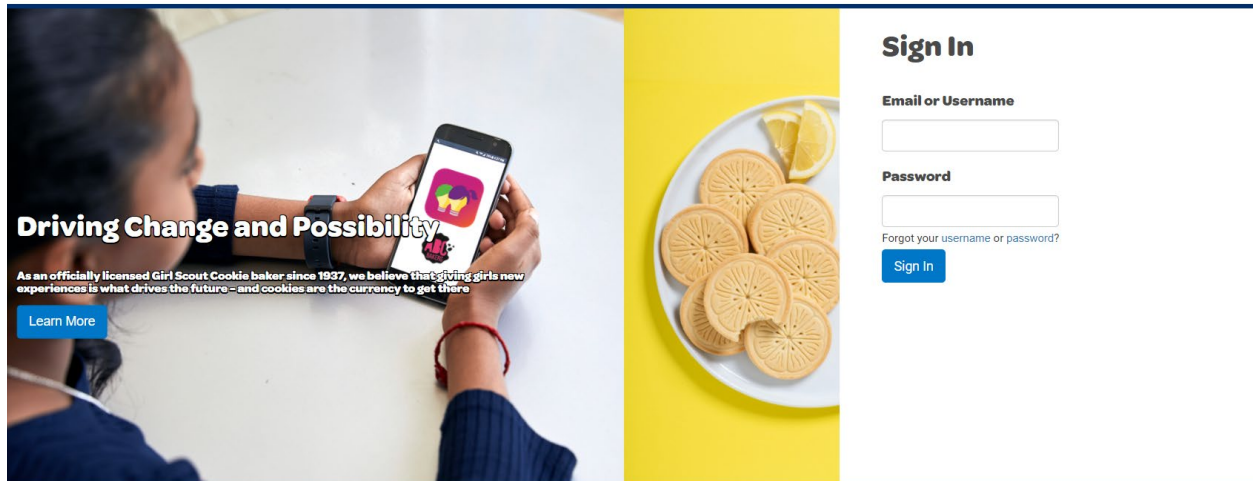
Login with the email as your username and the password you selected during the registration process and click "Sign In".

Note: If you only have one role (user for a single troop), you will go directly to the dashboard for your troop. If you have multiple roles (Service Unit Mentor with a troop, 2+ troops, etc.), a window will appear prompting you to select which role you will login as at this time:
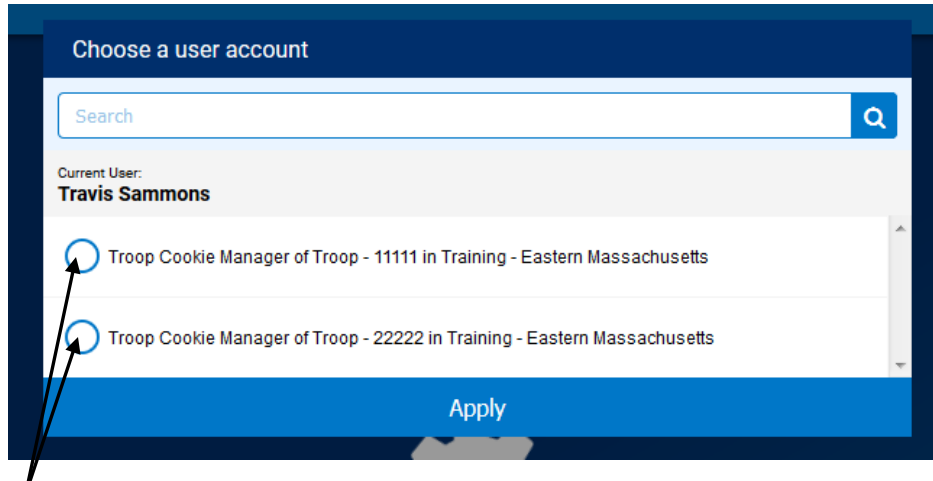
Click the radio button next to the role you will login as and click "Apply". Now you will be taken to the dashboard for that role.

Note: Girl logins are kept separate from all other logins, so you will not be able to switch to the girl dashboard from your troop login.

Switching Roles (if applicable)

To switch roles, if you have multiple (see previous page), there is a person icon in the top-left of the page:
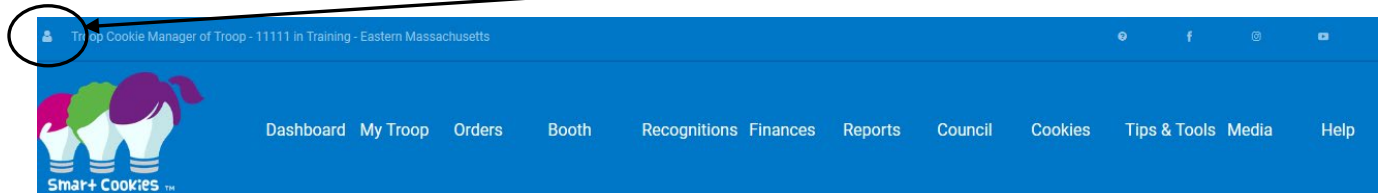
Once clicked, you will have the option to "Switch User" (change roles), "Mimic a User" (see below), "Edit Profile" (change personal information), or "Sign Out". Click "Switch User" and the previous prompt will appear once again to select a different role. Click "Apply", and you will be taken to that role's appropriate dashboard.

Mimic a User (if needed)

The Mimic a User function allows you to go into a girl's profile, so you can see exactly what they are seeing. This is a great function if they have questions and you can walk through it together.

Click the person icon at the top-left of the page and click "Mimic a User":
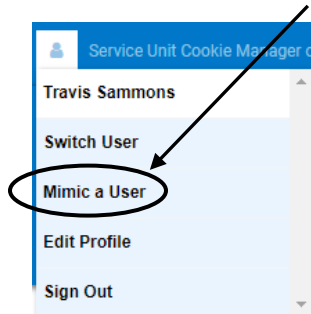
Once clicked, it will bring you to a list of Girl Scouts who have registered in the Smart Cookies system. Click on the name you would like to mimic and click the "Mimic a User" button:

A prompt will appear confirming if you want to mimic this user. Click "Yes" to continue (or "No" to cancel), and you will be brought to their profile where you can navigate just like the Girl Scout/Caregiver would do. Once completed, go to the top-left again and click "End Mimicking Session" and you will be returned to your dashboard.

Troop Dashboard
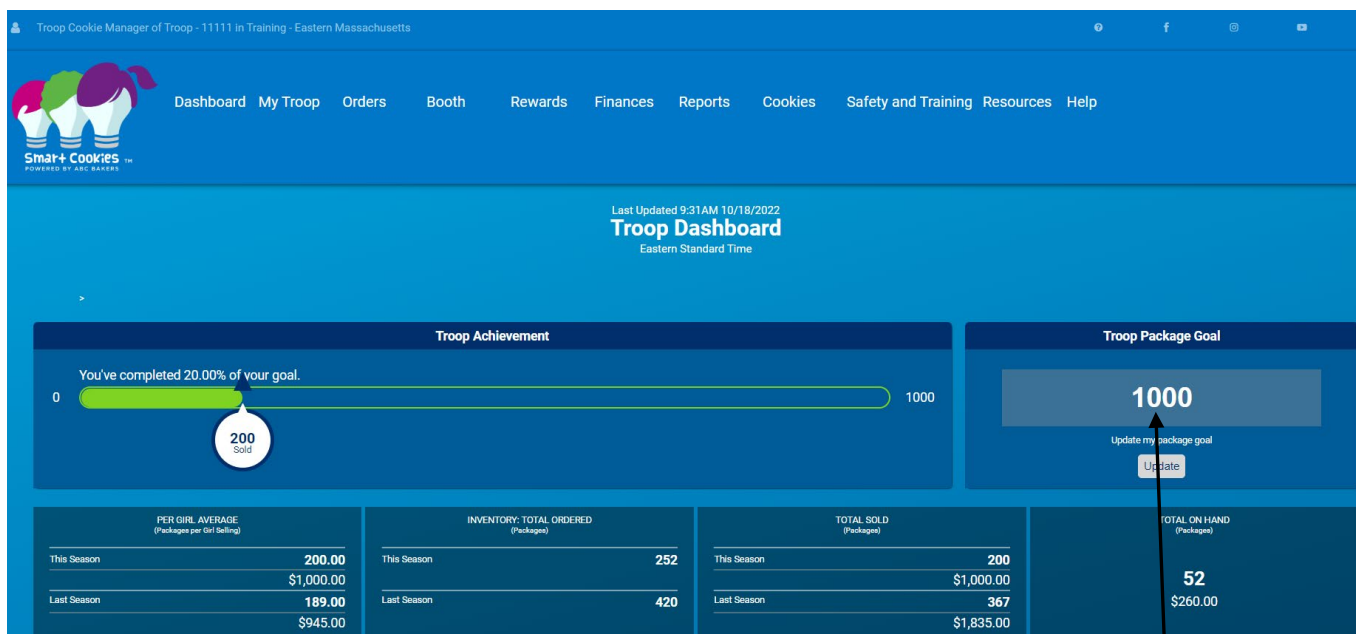
The Troop Dashboard details, at a high-level, the activity for your troop. From here, you can <u>set a troop goal</u> that will automatically update, throughout the sale, according to what has been assigned to Girl Scouts.

You can also view:

- **Per Girl Average (selling)** – this year vs. last year
- **Inventory Ordered (in packages)** – this year vs. last year
- **Total Sold (in packages)** – this year vs. last year
- **Total On Hand (in packages)** – amount of packages still left to be assigned to Girl Scouts
- **Calendar** with important dates and tasks associated with them
- **Messages** – either from Council or your Service Unit Mentor (if applicable)
- **Girls Registered and Selling, as well as, Online Participation** – this year vs. last year
- **Financial Summary** – Total Sales, Troop Proceeds, Council Proceeds (total amount due to Council), Credits, Deposits, Debt, Amount Collected (by Council) or Online, and Balance Due (to Council)
- **Girl Listings** based on how much they sold (e.g. what has been assigned to them using transfer orders or online ordering), summarized below at a rate of $5.00 per package

Navigating through Smart Cookies

To navigate through Smart Cookies, you will use the ribbon at the top of the page:
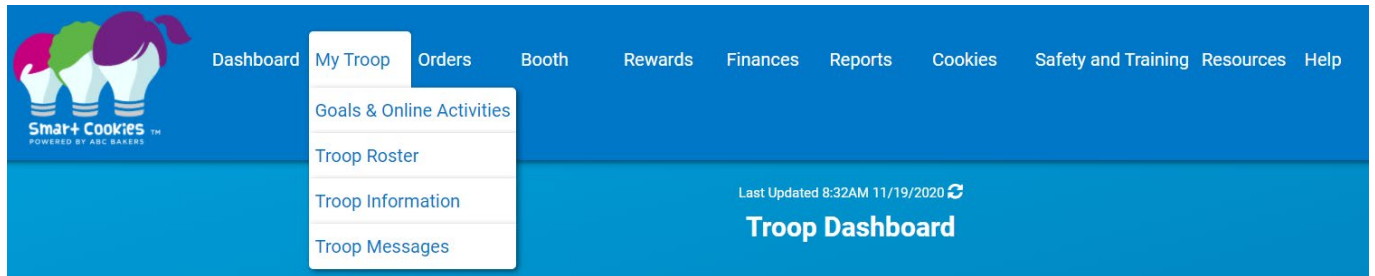
There are multiple sections of the database, each with their own set of sub-sections:

- Dashboard
- My Troop
    - Goals & Online Activities
    - Troop Roster
    - Troop Information (including Troop Ship Only Link)
    - Troop Messages
- Orders
    - Manage Orders
    - Transfer Order
    - Planned Order
    - Virtual Cookie Share
    - Troop Direct Ship Orders (Troop-level only)
- Booth
    - Schedule Booths
    - My Reservations
    - Troop Secured Booths/Virtual Girl-Delivery Booths (Troop-level)
    - Take Booth Credit Card Payment
    - View Booth Credit Card Payments
- Rewards
    - Manage Recognition Orders
    - Recognition Order
- Finances
    - Financial Transactions
- Reports
    - Current
    - Archived
- Cookies
- Safety and Training
    - Smart Cookies Training
    - Safety
- Resources
- Help

To go to each section, hover over each heading and click on the desired sub-section. "Dashboard", "Cookies", "Resources", and "Help" act as their own sub-section, so all you will need to do is click them.

Next, we will discuss each section in more detail.

Troop Dashboard – see page 6

My Troop

Goals & Online Activities

The Goals & Online Activities page gives you, as a troop leader, a high-level view of your Girl Scout's online participation during the Cookie Sale, and also allows you to set/edit the "Troop Package Goal" (**HIGHLY RECOMMENDED**) and send messages to Girl Scouts that they will see once they log into their own Smart Cookies account.
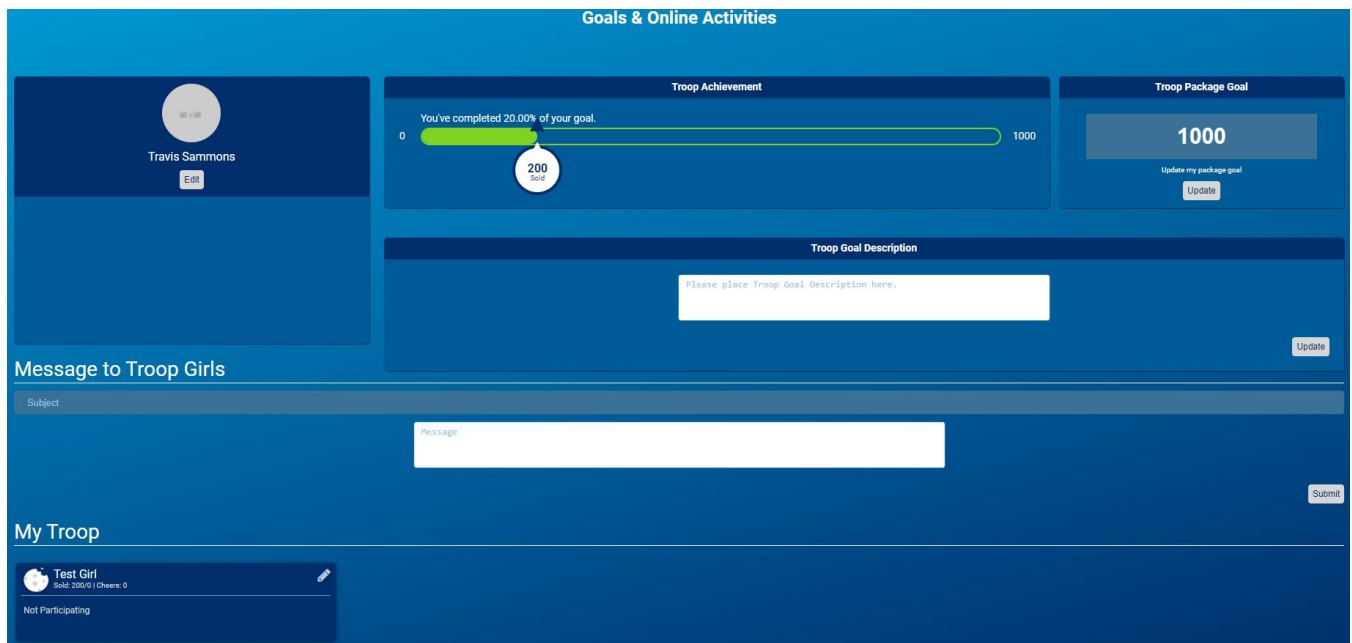
The first box on the top-left allows you to edit your profile information, as well as, add a picture if desired.

The "Troop Achievement" box shows the progress your troop is making towards the overall troop goal. This number populates whenever packages are assigned to your Girl Scouts, so it will fluctuate over time.

The "Troop Package Goal" has an editable box where you can enter a new number for your troop's goal and click "Update" so the system updates with the appropriate goal number.

The "Troop Goal Description" box can be edited to describe the reason the selected number is your goal, and this will also be visible to Girl Scouts when they log into their accounts.

You can also send a message to all of your Girl Scouts by adding a subject and message in the appropriate boxes, and as mentioned prior, the Girl Scouts will see this on their dashboard once they log into their own individual Smart Cookies account.

The "My Troop" section shows all of the Girl Scouts in your troop, and whether or not they are participating in the online portion of the sale. **Note: If a Girl Scout shows as "Not Participating", but you know for certain they is selling, this will not affect anything. This just pertains to the online portion (sending e-cards, receiving direct ship orders, etc.).**

In the top-right of each Girl Scout's box is a pencil icon, when you click this, you will be sent to their individual page:

On the Girl Scout page, you can view/edit their information and track sales, whether transferred to them or from online/direct ship sales. Also, the cheers they have received, virtual patches earned, and activity plan details can be viewed if the Girl Scout has done the goal-setting in their profile. If they have, you can check-off what activities they have completed and they can earn the virtual patches.

Troop Roster

The Troop Roster sub-section gives a list of all of the registered Girl Scouts in the troop and allows you to edit certain information for them:

To the far-right of each Girl Scouts' name is a pencil icon you can click to edit the girl information (you can also double-click on the row and the same window will appear):

Some of the information is pre-loaded, such as the Girl Scout's Name, Troop Number, GSUSAID, and Caregiver's Name and Email.

Recommended: At this point, you should select the Girl Scout's "Apparel" (t-shirt) size. When it is time to create a recognition order, if they earned the t-shirt recognition and it has been pre-selected at this time, the size will already be in the order and no further action will be needed. Click "Save" once finished and you can select other Girl Scouts' Apparel sizes, if needed.

Note: Girl Scouts are uploaded daily throughout the length of the program. If a registered Girl Scout is missing, you can contact Council at customercare@gsema.org to inquire.

Troop Information

The Troop Information page allows you to view information about your troop:

Important! There is an option for a Troop to have their Direct Ship order link provided to GSUSA's Cookie Finder to receive miscellaneous orders from customers (default set to 'Yes').

If your troop would like to opt-out of this option, please contact Council at customercare@gsema.org, as we will need to make the change for you.

Note: All of the information on this page is pre-loaded from our membership database, if any changes need to be made, please contact Council at customercare@gsema.org.

Troop Ship Only Link

Near the bottom of the "Troop Information" page, you will see a section titled "Troop Ship Only Link". By clicking the "Copy Link" button to the right of the URL, you are able to paste this link where customers can see and start taking troop-level direct ship orders (outside troop's delivery radius):

There is also an option for printing a handout which includes the Troop's unique QR Code and tiny URL that customers can scan, or type, to locate the Troop's ship only shop as well. These links/codes can be provided during live events or in pre-recorded videos showing off your troop and what goals they have set for this cookie season.

Once orders are completed in the online shop, your troop will be automatically credited with the packages and financials and no further intervention would be needed. Total packages and financial transactions will appear in the Troop Balance Summary report.

Recommended, at the end of the cookie program, you can transfer the packages from these orders to your girls by using the Smart Booth Divider feature in the system (*refer to pages 40-42*). There will be a line item on the Troop Reservations page (*refer to page 37*) where you can see this Direct Ship "booth" and the total sales for it.

Troop Messages

Troop messages allows you to post, to the Girl Scouts' dashboards, any messages about the program that you feel are relevant (deadlines, reminders, etc.).

To send a message, click "My Troop" -> "Troop Messages", in the bottom-left corner below the table, click "Add New Message" and the following window will appear:

Enter the Subject and body of the message, click to highlight "Girl" in the "Role" box, set the Priority (High, Medium, Low) and select a date where the message will be automatically removed (Optional).

Finally, click the radio button for "Send Message?" to either "Yes" or "No". If you click "Yes", the message will automatically send when you click "Save" and appear in the "Manage Messages" table with the current date appearing in "Date Sent".

If you click "No" (to wait until a later time), the window will close and the message will appear in the "Manage Messages" table with the "Date Sent" field blank. When you are ready to send, double-click (or click pencil icon) on the message's row and change the "Send Message?" to "Yes" and click "Save".

Orders

Manage Orders

The Manage Orders page collects every single type of order you have created throughout the entire length of the Cookie Program, <u>except for Recognition Orders</u> (*see pages 44-47 for details*).

The top section of the page details total amounts of cases during different phases:

- **Planned** – Orders currently in the system that have <u>NOT</u> been picked up as of now
- **Ordered** – Total amount of cases that have been picked up at the cupboard
- **Sold** – Cases assigned to Girl Scouts at the current time (transfers to Girl Scouts are done in packages and the system rounds up to nearest full case)
- **On Hand** – Total amount of cases in troop inventory, but not yet assigned to a Girl Scout

Note: The On Hand and Sold boxes should equal the Ordered box, but as mentioned prior, rounding may throw off the number a bit.

Below this section are the filters:
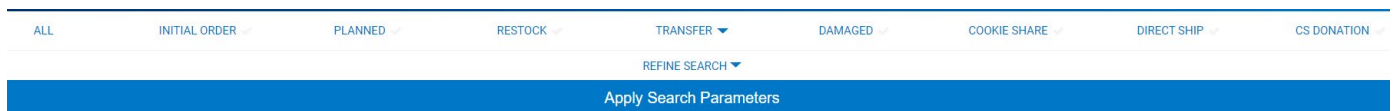
The types of filters are:

- **All** – selects every filter, no matter the order type, and makes them appear in the table underneath the filters
- Initial Order – order type not used by Council
- **Planned** – shows only orders that are yet to be picked up in a cupboard
- Restock – order type not used at Troop level
- **Transfer** – selects a specific type of transfer, or all transfer types, to view – click the down-facing arrow next to "Transfer" to select specific types:
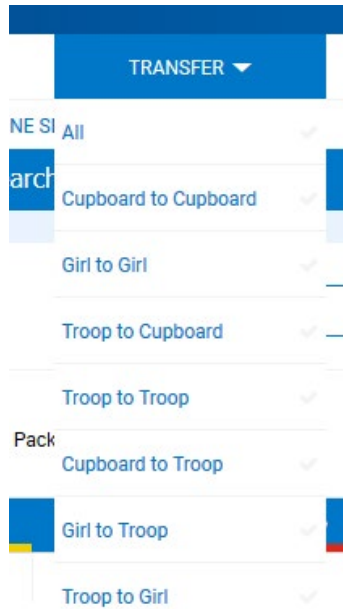
- **Damaged** – order type not used at Troop level
- **Cookie Share** – shows orders designated as Cookie Share – donations handled by Council
- **Direct Ship** – shows all orders that have been processed online through Smart Cookies Direct
- **CS Donation** - Council-level function; shows the recipients of Cookies for a Cause donations to Council partners

There is also a "Refine Search" feature which allows you to go even deeper into the filters and allows you to see all orders for specific girls, or from a specific cupboard.

After the desired filter(s) are selected, you would click "Apply Search Parameters" and all of the appropriate orders will appear in the table below the filters. You can also click "Clear all filters" to remove all of the selected filters and re-select.

The Manage Order table appears as follows:

DATE	ORDER #	TYPE	TO	FROM	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	RR	STATUS	
10/12/2022	1	T2G	Test Girl	11111	0	-200	0	0	0	0	0	0	0	0	0		⋮
10/18/2022	2	C2T	11111	Test Cupboard 1	0	24	12	24	24	60	36	48	12	12	0		⋮
10/18/2022	3	T2G	Test Girl	11111	0	-10	0	0	0	0	0	0	0	0	0		⋮
10/18/2022	4	T2G	Test Girl	11111	0	0	0	0	0	-10	0	0	0	0	0		⋮
10/18/2022	5	T2T	22222	11111	0	0	-5	0	-7	0	0	-3	0	0	0		⋮
10/18/2022	6	T2G	Test Girl	11111	0	0	0	0	-8	0	0	0	0	0	0		⋮
10/18/2022	7	T2G	Test Girl	11111	0	0	0	0	0	0	-9	0	0	0	0		⋮

7 Results

You can then decide to search by a keyword, order number, or by date range (From/To). You can also view the orders in Cases, Packages, or Cases/Packages (e.g. 14 packages would appear as 1/2 – 1 case [12 packages] and 2 packages). All columns are able to be sorted as well, just click on the header.

Note: To view more of an order's details in this table view, you can click on any of the cells in the table and use the arrow keys to move left, right, up, or down. Otherwise, if you go to the bottom of the table and hover near it, a <u>gray scroll bar</u> will appear where you can view more details:

14	PLANNED	11111	Test Cupboard 1	0	24	36	48	12	24	36	24	48	24	SAV
15	PLANNED	11111	Test Cupboard 1	0	12	24	36	48	60	0	0	0	0	SAV
16	PLANNED	11111	Test Cupboard 1	0	60	60	60	60	60	60	60	60	60	SAV

‹ 1 ›

You can also view more details of the order by clicking the <u>three stacked boxes</u> to the far-right of the order row:

TYPE	TO	FROM	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	RR	STATUS	
T2G	Test Girl	11111	0	-200	0	0	0	0	0	0	0	0	0		⋮
C2T	11111	Test Cupboard 1	0	24	12	24	24	60	36	48	12	12	0		⋮
T2G	Test Girl	11111	0	-10	0	0	0	0	0	0	0	0	0		⋮

For certain types of orders, you can edit or delete them, as is the case for Girl Scout transfers, or view only, as is the case for Cupboard to Troop transfers (orders picked up in the cupboard) or Planned Orders (orders not yet picked up at the cupboard).

More details about Transfer types can be found on pages 15-18 and more details about Planned Orders can be found on pages 19-20.

Transfer Order

There are four types of transfers a Troop user can create:

- **Troop to Girl (T2G)** – assigning packages to Girl Scouts for recognitions
- **Girl to Girl (G2G)** – transfer packages from one Girl Scout to another
- **Girl to Troop (G2T)** – giving packages back to the troop from a Girl Scout
- **Troop to Troop (T2T)** – giving packages to another troop within the Council footprint

Troop to Girl (T2G) Transfers:

- Select "Troop to Girl" in the "Type of Transfer" box
- The "From" row is pre-loaded; on the "To" row, click on the row with "Service Unit", "Troop", "Girl"
- Boxes will appear with the Service Unit and Troop number pre-selected; click on the Girl Scout you are transferring to and click "Apply"

- Put the number of packages you are transferring, by cookie variety, to the Girl Scout in either the "Packages" or "Booths Packages" column

Note: The difference between the columns is as follows:

- "Packages" column – transferring packages to Girl Scouts with the financial responsibility being transferred with the actual number of packages
  - For example, you have a booth sale with 100 packages, 80 are sold at the booth sale and 20 are unsold. A Girl Scout wants to take possession of the 20 packages and you would transfer them using the "Packages" column to note that the Girl Scout is responsible for the money being collected for those packages.
- "Booths Packages" column – transferring packages to Girl Scouts with the financial responsibility NOT being transferred with the actual number of packages
  - The previously mentioned 80 packages that were sold at a booth sale, you just want to give credit to the Girl Scouts for selling them, since money has already been collected, so you use the "Booths Packages" column to note this. No money changes hands at all in this transaction.

Note: If you do not know the actual varieties, just pick one and put in the total amount.

- Once the packages are entered, you can add any order notes (optional) and then click "Save" to complete the transfer.

You can then delete the order at this point if you made a mistake, print a receipt for your records, go to the Manage Orders page, or click "Make Another Transfer" to stay on the page and do another transfer.

Girl to Girl (G2G) Transfers:

- Select "Girl to Girl" in the "Type of Transfer" box
- Click on the "From" row to select the Girl Scout to transfer from (Service Unit and Troop are pre-loaded) and click "Apply"
- Click on the "To" row to select the Girl Scout to transfer to (Service Unit and Troop are pre-loaded) and click "Apply"

- Put the number of packages you are transferring from one Girl Scout to another, by cookie variety, in the "Packages" column
- Once the packages are entered, you can add any order notes (optional) and then click "Save" to complete the transfer.

You can then delete the order at this point if you made a mistake, print a receipt for your records, go to the Manage Orders page, or click "Make Another Transfer" to stay on the page and do another transfer.

Girl to Troop (G2T) Transfers:

- Select "Girl to Troop" in the "Type of Transfer" box
- Click on the "From" row to select the Girl Scout to transfer from (Service Unit and Troop are pre-loaded) and click "Apply"; the "To" row is pre-loaded

- Put the number of packages you are transferring from the Girl Scout, by cookie variety, in either the "Packages" or "Booth Packages" column (*see page 16 for the differences between the columns*)
- Once the packages are entered, you can add any order notes (optional) and then click "Save" to complete the transfer.

You can then delete the order at this point if you made a mistake, print a receipt for your records, go to the Manage Orders page, or click "Make Another Transfer" to stay on the page and do another transfer.

Troop to Troop (T2T) Transfers:

- Select "Troop to Troop" in the "Type of Transfer" box
- Click on the "From" row to select the Troop to transfer from (yours) – Service Unit is pre-loaded; click "Apply"
- Click on the "To" row to select the Troop to transfer to – Service Unit is pre-loaded; click "Apply"

TYPE OF TRANSFER:
Troop to Troop ▼

From: Transfer Order

SERVICE UNIT Abington   TROOP 11111

Quantity: **1491 Packages**   Contact: **Travis Sammons | (978) 269-6660 | tsammons@gsema.org**

To: Reset

SERVICE UNIT Abington   TROOP 22222   ⌄

Quantity: **-6 Packages**   Contact: **Erin Sullivan | (781) 373-4237 | esullivan@gsema.org**

- Put the number of packages you are transferring to the other troop, by cookie variety, in the "Packages" column

Note: Money is always transferred with the packages for T2T transfers. It is recommended that no money change hands physically, only the packages themselves. Once the transfer is done in the system, all money will be adjusted automatically. If money was taken for these cookies by the giving troop, the receiving troop would be debited for money they do not have, essentially being double-charged for the same cookies. If this occurs, a financial adjustment will need to be made at the Council-level to take care of the money changing hands.

- Once the packages are entered, you can add any order notes (optional, but **highly recommended**) and then click "Save" to complete the transfer.

You can then delete the order at this point if you made a mistake, print a receipt for your records, go to the Manage Orders page, or click "Make Another Transfer" to stay on the page and do another transfer.

Note: The troop receiving the transfer will receive an email confirming the transfer has been done and the cookies now belong to them and are financially responsible at this point.

Important: Another transfer type you may see in the system is noted as C2T, or Cupboard to Troop, transfer. This is when a Planned Order has been picked up at the cupboard and the order has been approved by the Cupboard manager. Once this happens, the cases/packages are transferred FROM the cupboard TO the troop.

Planned Order

Planned Orders are cookie orders reserved for pick-up at Council and Home cupboard locations throughout the GSEMA Council footprint.

To create a Planned Order:

- Select the cupboard to pick-up from in the first box (a clickable Google map is shown to provide more location details) and click "Continue"
- Select the date to pick-up the cookies (only dates the cupboard is open are shown) and click "Continue"

Important: All orders for the upcoming week need to be in before 10pm on Sunday. If it is past 10pm, the dates for the upcoming week are removed and you will need to contact the cupboard if you need an order for that week.

- Select the time to pick-up the cookies (only times the cupboard is open are shown) and click "Continue"

Note: If you need to pick-up outside of your allocated time slot, please contact the cupboard. In most cases, changes in time can be accommodated easily.

At this point, you can edit the location, date, or time of pick-up by clicking any of the edit buttons:

Once you are satisfied with the location, date, and time, you can put in the details of the order.

Note: All Planned Orders are done in CASES; there are <u>12 packages in each case, for EVERY variety</u>**. If you are planning on picking up one case of Adventurefuls, enter '1' in the box of the column labeled, CASES. If you enter 12, you will receive 12 cases of Adventurefuls.**

- Enter the number of CASES, for each variety, in the boxes under the "Cases" column:

			CASES
Clear Quantities			
●	Adventurefuls	$0.00	0
●	Toast-Yay	$0.00	0
●	Lemonades	$0.00	0
●	Trefoil	$0.00	0
●	Thin Mints	$0.00	0
●	Peanut Butter Patties	$0.00	0
●	Caramel deLites	$0.00	0
●	Peanut Butter Sandwich	$0.00	0
●	Caramel Chocolate Chip	$0.00	0
Totals		**$0.00**	**0**

- Enter the pick-up person's name and phone number in the "Order Notes" box:

Order Notes

Pick-up Person's Name and Phone Number

Note: The pick-up person does not have to be a member of the troop or a registered Girl Scout. As long as they know the troop number and have a valid ID, they can pick up the cookies.

- Re-check the order for accuracy and click "Save" when finished.

At this point, you can delete the order or print a receipt for your records. You can also go to the "Manage Orders" page under "Orders", use the filters for Planned Order and see the order submitted in the system (*refer to pages 13-15 for more details*).

Note: Planned Orders will show as "Saved" at this time. This means the cupboard manager has not yet approved the order, because it has not been picked up. Once the order is picked up, the status will change to "Approved".

Virtual Cookie Share (also known as Cookies for a Cause)

Virtual Cookie Share orders are those that are designated as donation cookies and are ADDED to your troop's sales. For example, if a customer wants to donate packages that you do not currently have, you can create this order to add-on packages for donation. The troop is financially responsible for these cookies.

Important: Troops do NOT see these packages, they go directly to the Council's "pool" of donation packages for distribution to Council partners, which includes the Boston Food Bank and Hanscom AFB.

Note: If a troop wants to donate to their own local organization(s), they will need to set aside physical packages they own (from Planned Orders) and deliver them whenever they see fit.

To create a Virtual Cookie Share order:

- Enter the number of donation packages, by individual Girl Scout, in their respective rows:

- Add order notes (optional) that you may find helpful
- Click "Save"

You can delete the order at this point, if you made a mistake. Otherwise, you can navigate to another page.

Troop Direct Ship Orders (Troop-level only)

The Troop Direct Ship Orders page, found under the "Orders" section, is where all of the direct ship orders are compiled when a customer places an order through the Troop Ship Only Link (*refer to page 11*). It is recommended you check-in periodically to make sure there are no orders that are "Pending distribution".

Note: If your troop has submitted the form to opt-into the GSEMA Cookie Connector, those orders will appear here as well. Smart Cookies however, makes no distinction between whether the cookies were ordered through the ship only link you provided, possibly through social media, or if they come from the Cookie Connector itself. Smart Cookies treats the orders exactly the same.

To view/distribute the received direct ship orders:

- Hover over "Orders" and click "Troop Direct Ship Orders"; if there are orders, they will appear in a table:

DATE	ORDER #	Customer Name	Customer Address	Status
12/9/2020	669737			Pending distribution
12/9/2020	669726			Pending distribution
12/9/2020	669723			Pending distribution
12/8/2020	667902			Pending distribution
12/7/2020	665741			Pending distribution
12/3/2020	660737			Pending distribution
11/28/2020	655943			Pending distribution
11/24/2020	652957			Pending distribution
11/23/2020	651318			Pending distribution
11/23/2020	651292			Pending distribution
11/23/2020	651175			Pending distribution

Note: Any orders that need to be distributed to Girl Scouts will show a "Pending distribution" box under the "Status" column. This means they have not yet been assigned packages from this order.

- Scroll to the bottom of the page where you will see a Summary for the total number of packages needing to be distributed; click the "Distribute orders to girls" button to begin the assignment of packages:

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	PACKAGES	TOTAL $
0	11	5	8	2	18	15	19	7	3	88	440.00

Distribute orders to girls

- In the window that appears, click the checkbox next to the names of the Girl Scout(s) you would like to assign packages to:
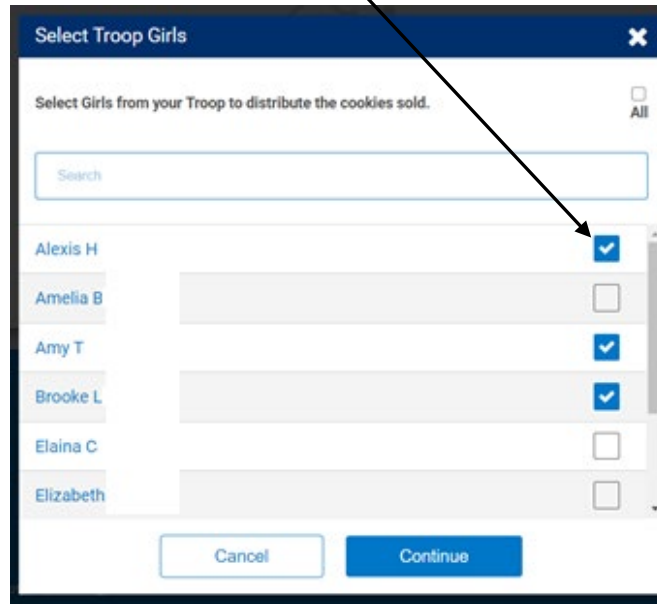
- Click the "Continue" button once done, and it will bring you to a page where the system has distributed the packages evenly amongst the Girl Scout(s) (*similar to the Smart Booth Divider function – refer to pages 40-42*):

GIRL NAME	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	PACKAGES SOLD
Alexis	0	3	1	2	0	6	5	6	2	1	26
Amy	0	3	1	2	0	6	5	6	2	1	26
Brooke	0	3	1	2	0	6	5	6	2	1	26
Packages left to Distribute	0	2	2	2	2	0	0	1	1	0	10
Troop Total	0	9	3	6	0	18	15	18	6	3	78

Edit Girls   Save

- Review the distributions and make edits as necessary by clicking any of the boxes in the Girl Scouts' row(s); you can also add/remove Girl Scouts by clicking the "Edit Girls" button as well

Note: If there are red boxes in the "Packages left to Distribute" row, those will need to be resolved before you are able to save the distribution. These boxes designate that the system was not able to evenly distribute the varieties and therefore have packages leftover that will need to be assigned.

- Once all red boxes have been resolved, click the "Save" button to complete the distribution and have those cookies assigned to the selected Girl Scout(s)

Note: Smart Cookies distributes all pending troop direct ship orders at once, so once this process is completed, all of the listed orders, from the prior table, will now have a status of "Distributed":

DATE	ORDER #	Customer Name	Customer Address	Status
12/9/2020	669737			Distributed
12/9/2020	669726			Distributed
12/9/2020	669723			Distributed
12/8/2020	667902			Distributed
12/7/2020	665741			Distributed
12/3/2020	660737			Distributed
11/28/2020	655943			Distributed
11/24/2020	652957			Distributed
11/23/2020	651318			Distributed
11/23/2020	651292			Distributed
11/23/2020	651175			Distributed

Note: If additional orders are placed, you can click the "Distribute orders to girls" button again, but you may have to cancel the previous distribution to do it all again at once. To do so, in the page that appears, click the "Cancel Total Distribution button" in the top area and repeat the steps to distribute again:

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
0	11	5	8	2	18	15	19	7	3

Cancel Total Distribution

Important! If you transfer the total packages from these Direct Ship orders using the Troop to Girl (T2G) transfer function (*refer to page 16*), the "Troop Direct Ship Orders" page will still show the orders as "Pending distribution", since it ignores the transfers made using the T2G function. If you happen to transfer using both of these methods, you may end up with a negative on-hand inventory balance. For these orders, make sure to use the "Distribute orders to girls" function, NOT the T2G transfer function.

Troop Direct Ship Orders (Manage Orders view)

Troop Direct Ship Orders can also be found on the "Manage Orders" screen (under "Orders"). The "Type" will always show as "DIRECT_SHIP", but the "Order #" will designate from what avenue the orders came from.

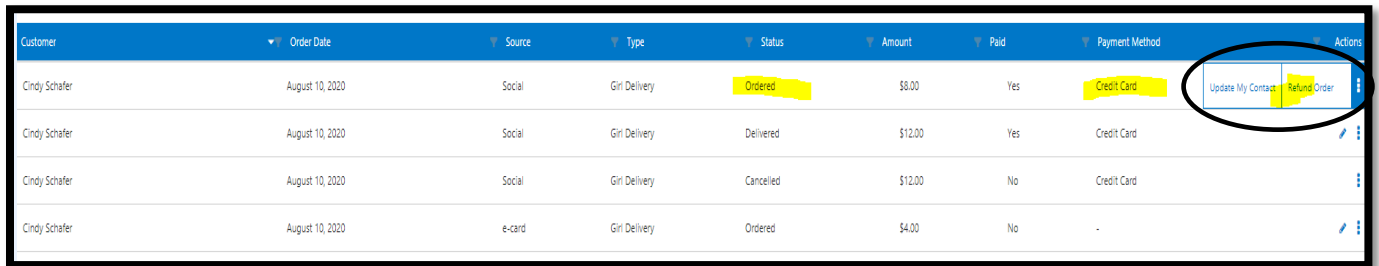| DATE	ORDER #	TYPE	TO	FROM	CShare	ADV	TY	LEM	TRE	TM
11/28/2020	S655981	DIRECT_SHIP			0	0	0	1	0	1
12/1/2020	S658547	DIRECT_SHIP			0	1	0	1	1	2
12/4/2020	S661875	DIRECT_SHIP			0	0	0	1	1	3
11/23/2020	TDS31015	DIRECT_SHIP			0	11	5	8	2	18

If the order number begins with an 'S', that means a Girl Scout has received an order and this is the transaction giving credit to the Troop/Girl Scout. If the order number begins with 'TDS' that means it came from the Troop Direct Ship link, either one you posted (on social media, via email, or video) or through the Cookie Connector.

Note: Alternatively, you might see 'TDSD', this means the Troop Direct Ship Order has been distributed.
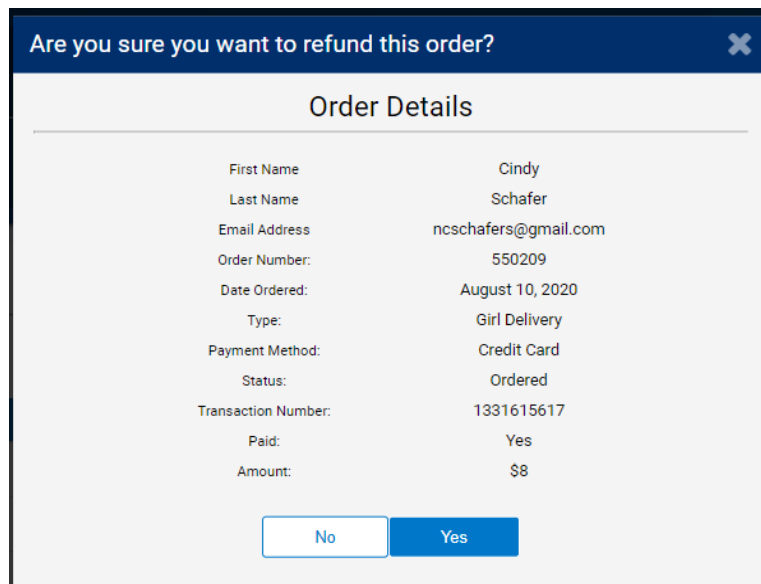
Order Refunding

If a Girl-Delivery order needs to be refunded, there is a function for troop-level (and above) users to do so. When a credit card payment is successfully processed on a Girl-Delivery order, a financial transaction is created for both the troop and the Girl Scout.

To issue a refund, a troop (or SU/District/Council) user will mimic the affected Girl Scout, locate the order on their "Manage My Orders" page, and select the "Refund Order" option by clicking the three stacked boxes to the far-right:

A window will then appear showing the details of the order:

By clicking the "Yes" button, the order will then be refunded to the customer and an email will be sent to them letting them know the order was refunded.

The order status, on the Girl Scout's "Manage My Orders" page, will now show the order as refunded and the troop and Girl Scout financial transactions will be zeroed-out. The transactions will remain to provide a paper trail for this refund.

Booth

Schedule Booths

The two different types of booth sales are:

- **Council-Organized Booth Sales (COBS)** – special partnerships setup by Council in order to hold booth sales based on a lottery system (sites include: MBTAs, certain Malls, and various business partnerships – the list of these sites will be in the system and on the website, http://www.gsema.org/)
- **Troop Secured (also known as Town-Specific or Individual Town Booths)** – organized by a specific booth coordinator in your own town, or individually setup by troops, reaching out to local places in the town to hold a booth sale

COBS Lottery Process

To add your troop to the COBS lottery:

- Click on "Booth" -> "Schedule Booths"; the following window will appear:

Note: This page will tell you if the lottery is currently open/closed and the open/close dates to make requests. This also tells you how many requests you have and the maximum number of slots you may receive. Council does not designate any slot as premium; all slots are treated equally.

- Scroll down below your troop information and you will see a list of COBS sites to the left and a Google map showing you the location of each site:
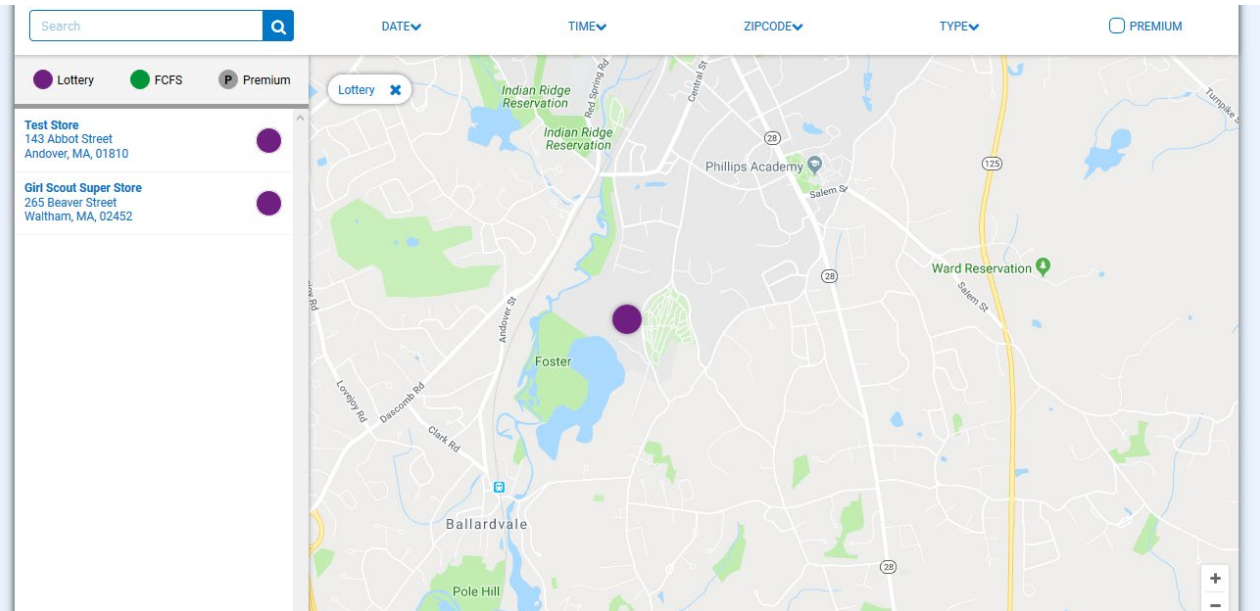
Note: There are additional filters you can use to designate specific dates, times, and locations (based on zip code proximity). There is also a legend above the list of sites that shows you if these sites are designated as Lottery or FCFS (First Come, First Served) – *more information about FCFS can be found on pages 32-34.*

- Click on the site you would like to request for the lottery; calendars will appear for the month(s) the site is available – dates highlighted in blue let you know there are available times to request:

- Click on a date highlighted in blue and available times will appear for you to request:

- Click on any time slot you would like to request – you can also click multiple days at the same time, in different months as well, and requested dates will show a box around them to designate a choice has been made for that date:

- Once all selections have been made, click "Save" at the bottom and a box will appear telling you the selections have been made
- This will take you back to the selection screen if you want to make choices at different sites

To view all lottery requests made:

- Click on "Booth" – "My Reservations"; the following window will appear:

Troop Booth Reservations

Lottery	First Come, First Served (FCFS)	Troop Secured	Council Reservations
Premium Wins 0	Premium Reservations 0	Approved 0	Premium 0
Premium Wins Max 0	Premium Reservations Max 0		
Total Wins 0	Total Reservations 0	Denied 0	Total 0
Total Wins Max 3	Total Reservations Max 0		
Requests 26		Pending 0	
Requests Max 100			
✔ Show Results	✔ Show Results	✔ Show Results	✔ Show Results

DISTRICT No Specified District	SERVICE UNIT Abington	TROOP 11111

Troop: **11111**   Name: **Travis Sammons** Phone: **(978) 269-6660** Email: **tsammons@gsema.org**

- The top of this page has four sections: Lottery, First Come, First Served (FCFS), Troop Secured, and Council Reservations:
  - **Lottery** – shows the number of wins and requests made
  - **First Come, First Served (FCFS)** – shows the number of FCFS reservations made – *more information on pages 32-34*
  - **Troop Secured** – town-specific booth sales added and whether or not they been approved, denied, or pending – *more information on pages 34-38*
  - **Council Reservations** – assignments for troops made by Council – function rarely used by Council

- Scroll down to the Booth Sales table to view all booth sales associated with the troop:

9 Results

Search [ ] 🔍

✔ Show Confirmed Reservations   ✔ Show Pending or Denied Reservations   ✔ Booths left to distribute

STORE	ADDRESS	CITY	ZIP CODE	DATE	TIME
Test Store	143 Abbot Street	Andover	01810	Dec 12	10:00 AM - 12:00 PM
Test Store	143 Abbot Street	Andover	01810	Dec 12	12:00 PM - 02:00 PM
Test Store	143 Abbot Street	Andover	01810	Dec 14	12:00 PM - 02:00 PM
Test Store	143 Abbot Street	Andover	01810	Dec 26	10:00 AM - 12:00 PM
Test Store	143 Abbot Street	Andover	01810	Jan 04	10:00 AM - 12:00 PM
Test Store	143 Abbot Street	Andover	01810	Jan 18	10:00 AM - 12:00 PM
Test Store	143 Abbot Street	Andover	01810	Jan 18	12:00 PM - 02:00 PM
Test Store	143 Abbot Street	Andover	01810	Jan 16	10:00 AM - 12:00 PM
Test Store	143 Abbot Street	Andover	01810	Jan 16	12:00 PM - 02:00 PM

- At the bottom of this table you will see a <u>gray scroll bar</u>; click it and scroll to the right to see the status of booth sales:

	ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL $	
	01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 26	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 04	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 18	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 18	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 16	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 16	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮

Note: In this example, you can see the type of request is "Lottery" and the status is "Requested", this means your troop is currently entered into the lottery for these locations, dates, and times. You can also click on the <u>three stacked boxes to the far-right</u> to see more Booth Details, use the Smart Booth Divider (*more information on pages 40-42*), or Remove Reservation (Request):

	ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL $	
	01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Dec 26	10:00 AM - 12:00 PM	☐	LOTTERY	REQU [Booth Details] [Smart Booth Divider] [Remove Reservation]			⋮
	01810	Jan 04	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 18	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 18	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 16	10:00 AM - 12:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮
	01810	Jan 16	12:00 PM - 02:00 PM	☐	LOTTERY	REQUESTED	0	0	⋮

Important! At the designated lottery date and time, the system will generate lottery results automatically and the primary contact listed in Smart Cookies will receive an email if the troop has won a requested slot.

After the lottery has been run, you can then go back into "Booths" -> "My Reservations" to see if you won any slot, and if you did, they will be listed in the Booth table and all other requests removed:

Important! If for any reason you cannot make a booth sale and you click to "Remove Reservation", you will need to contact Council, preferably within 48 hours, to avoid a cancellation fee.

First Come, First Served (FCFS) Reservation Process

After the lottery has been run and slots filled by troops, a period known as First Come, First Served (FCFS) will be opened. This allows troops to reserve slots for different sites automatically, based on availability. Certain sites with specific dates and times are, sometimes, never requested for the lottery, so this period allows any troop to take any remaining slots (up to two maximum per troop).

To request a FCFS slot:

- Click on "Booths" -> "Schedule Booths"
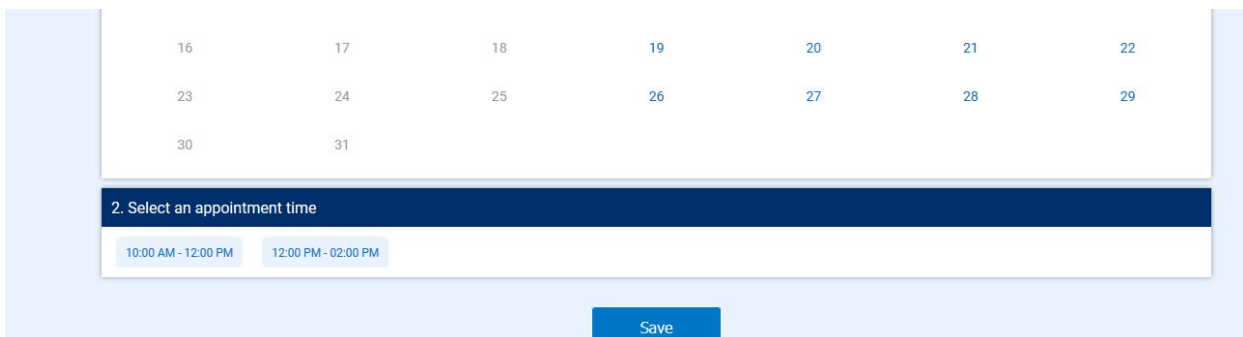- At the top of this page you will now see the First Come, First Served period is open and for how long:

- Scroll down to the list of sites and the Google map, and any site with remaining available slots will appear:
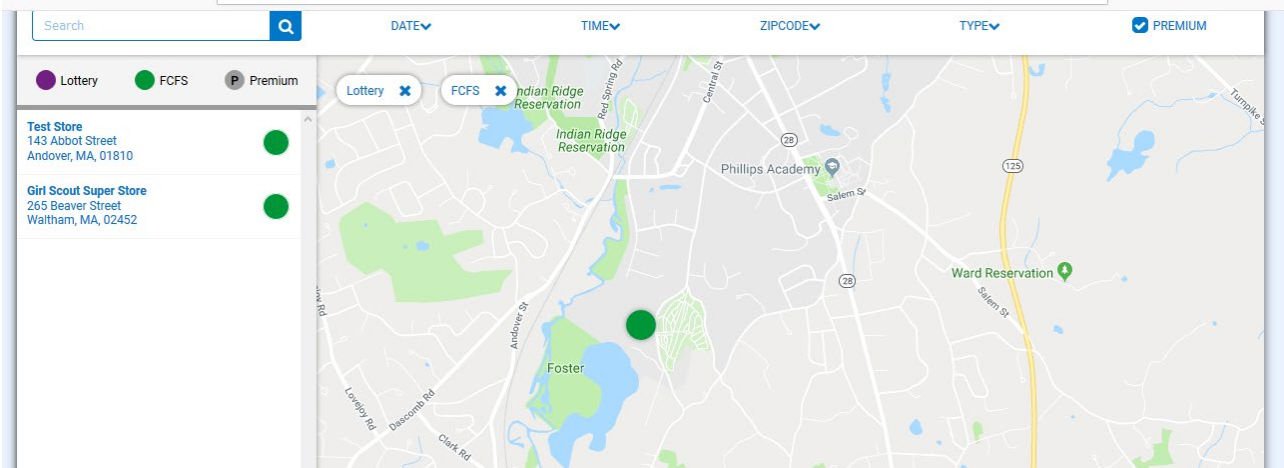
- Click on a site and a calendar with tabs by month will appear:
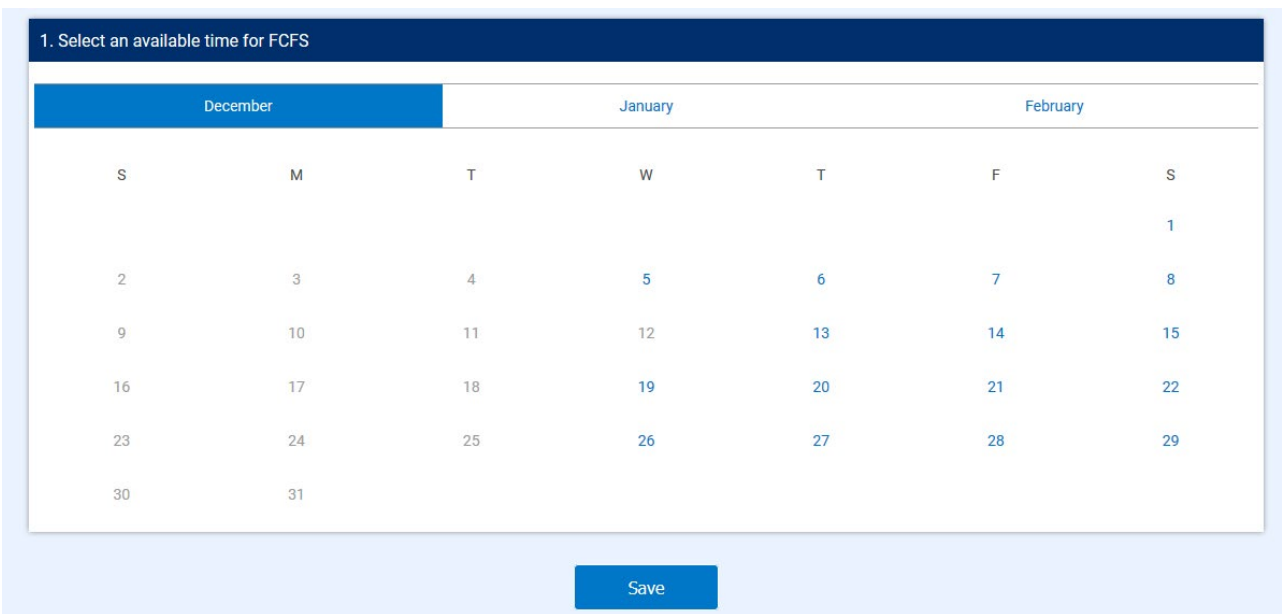
- Click on a date highlighted in blue, which shows availability, and times will appear below:

- Click on the time slot you would like and click "Save"; a box will appear letting you know if the reservation was successful – if it was successful, you were the first one to request it and it is now your sale <u>automatically</u> – you can do this <u>up to two times</u> then you will be locked out from reserving any more

To view your additional FCFS booth sales:

- Click on "Booths" -> "My Reservations
- Scroll down to the booth sale table and you will see all of your current sales, designated as either lottery win or FCFS:

5 Results

	ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL $	
	01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	WIN	0	0	⋮
	01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0	⋮
	01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0	⋮
	01810	Dec 05	12:00 PM - 02:00 PM	☐	FCFS		0	0	⋮
	02452	Dec 20	01:30 PM - 04:00 PM	☐	FCFS		0	0	⋮

☑ Show Confirmed Reservations ☑ Show Pending or Denied Reservations ☑ Booths left to distribute

Troop Secured Booths/Virtual Girl-Delivery Booths (Troop-level)

- Click on "Booth" -> "Troop Secured Booths"; the following page will appear:

Booth Information	Appointment Times

Address

Store Name

Location Information (Optional)

☐ Is this a Virtual Pick up Booth?

Note: There are two tabs – "Booth Information" and "Appointment Times" – the "Appointment Times" tab does not activate without first filling out the Booth Information.

Note: There is a checkbox to designate whether this is a <u>Virtual Pick-up Booth</u> or not.

If this box IS NOT selected, that means the booth is your typical in-person booth sale at a physical location, similar to the booth sales troops have conducted in the past.
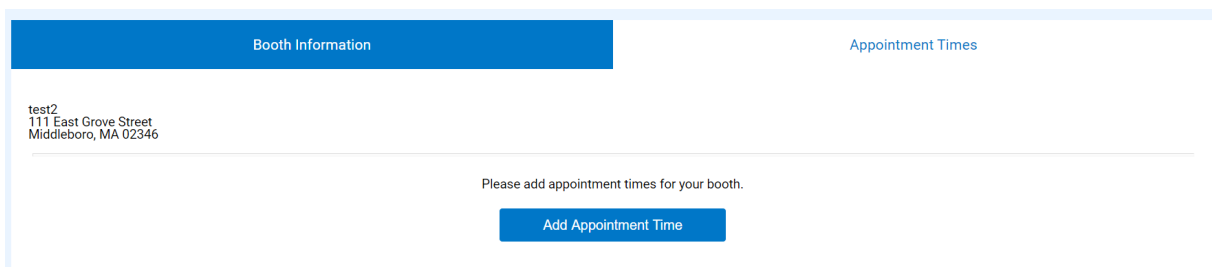
If this box IS selected, when all of the location information and sale date/time are entered and requested, a Girl-Delivery link is generated (on the "Troop Information" page) that works much like the Troop Ship Only Link (*see page 11*). This link can be provided on social media, or through a live event, that will allow customers to place orders during the booth sale timeframe and have Girl Scouts deliver them after the fact.

- The first step is to enter the required information for the booth:
  - o Store Name
  - o Booth Location Address (valid addresses will appear in the Google map window to the right once the location is saved)
  - o City
  - o State
  - o Zip Code
  - o Troop Contact will pre-fill with primary contact's information – change as needed

Note: Do NOT click the "Booth Permission" box. This allows Council to assign this local booth to any troop within the Council. Council will not do this as we are aware of the limited availability of sites in certain areas.

Optional information can also be entered that may help find the location. Enter any additional information in the "Location Information" box (such as cross streets, square names, etc.) or the "Booth Notes" box.

- Once the required Booth Information has been entered, click "Next" and the "Appointment Times" tab will then activate:

- Click "Add Appointment Time" and a window will appear to select the dates and start/end times:

- Once the date, start time, and end time have been selected, click "Save"; the window will close and the sale will appear in the request table:

Booth Information				Appointment Times

test2
111 East Grove Street
Middleboro, MA 02346

Add Appointment Time

DATE	▼	TIME	▼	BOOKING STATUS	▼	ACTIONS
2020-11-25		9:00 AM - 1:00 PM		PENDING		

Go to Troop Reservations   Save

Note: If you have multiple dates/times at the same location, you can add them at this point, otherwise, you can add them later by going to "Booths" -> "My Reservations", scrolling down to the Booth Sale table, scrolling to the far-right and clicking the three stacked boxes to edit the booth.

- Click "Save" to add it to the Council queue, if the check box IS NOT selected (for Standard booth); if the check box IS selected (for Virtual booth), it will be added to your booth list on the "My Reservations" page (*see page 30*)

Important! If you have a booth sale scheduled at the exact same location as a prior booth sale, you will need to go to "Booths" -> "My Reservations", find the previous booth sale you had at that location, scroll to the far-right and click "Booth Details" to edit. Once there, you will need to follow the same steps under the "Appointment Times" tab (*see above*) you did when the booth sale location was entered the first time.

To view all Troop Secured Booth Sales:

- Click on "Booth" -> "My Reservations"
- Scroll down to the Booth Sale table and scroll to the right to see the status of your recently entered Booth Sale:

6 Results

☑ Show Confirmed Reservations	☑ Show Pending or Denied Reservations	☑ Booths left to distribute					
ZIP CODE ▼	DATE ▼	TIME ▼	PREMIUM ▼	TYPE ▼	STATUS ▼	QTY SOLD	TOTAL $
01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	☐	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	☐	FCFS		0	0
01810	May 25	10:00 AM - 11:00 AM	☐	TROOP_SECURED	PENDING	0	0

Note: There are three statuses for Troop Secured Booth Sales – "Approved", "Denied", or "Pending". Council checks multiple times <u>per business day</u> to review booth sales that have been entered by troops.

Important! A booth sale always starts as "Pending", and once it is checked, it will most likely be "Approved". The only reasons for denial are if the sale is listed at a Liquor Store, or something similar, or if the location is the same as a COBS site with which Council has a special partnership.

Once a booth sale is "Approved" or "Denied", the primary contact will receive an email stating this.

Below you will see the sale as "Approved"; prior screenshot shows it as "Pending":

6 Results

☑ Show Confirmed Reservations	☑ Show Pending or Denied Reservations	☑ Booths left to distribute					
ZIP CODE ▼	DATE ▼	TIME ▼	PREMIUM ▼	TYPE ▼	STATUS ▼	QTY SOLD	TOTAL $
01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	☐	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	☐	FCFS		0	0
01810	May 25	10:00 AM - 11:00 AM	☐	TROOP_SECURED	APPROVED	0	0

The virtual booth sale will have a different type listed (see below):

ADDRESS	CITY	ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS
111 East Grove Street	Middleboro	02346	Wednesday, Nov 25	01:00 PM - 04:00 PM	☐	TROOP_SECURED	PENDING
265 Beaver St	Waltham	02452	Friday, Nov 27	01:00 PM - 04:00 PM	☐	VIRTUAL_PICK_UP	
143 Abbot Street	Andover	01810	Monday, Nov 30	01:00 PM - 04:00 PM	☐	TROOP_SECURED	APPROVED

It will be listed as a "VIRTUAL_PICK_UP", which designates it as a Virtual Booth Sale, and will have the total packages (by variety) approved for this particular booth sale included in the same row of the table.

The link, associated with these booth sales types, will be provided on the "Troop Information" page, below where the Troop Ship Only Link is located:

Troop Virtual Booth

Please set the Begin date and End date for your troop's virtual booth sale. Once these dates are saved, your virtual booth link will appear at the bottom to share with your friends and family via email or social media.

Begin accepting sales
11/4/2020

End accepting sales
2/18/2021

Allow delivery for Virtual Booth Sale?
○ Yes ● No

https://uatapp.abcsmartcookies.com/#/virtual-booth-landing/afd2f4a8-b2ad-440e-80aa-3ad326ed30a3   Copy Link

Select link by clicking Copy Link.
Go to where you want to paste it, right click, choose PASTE.

Note: If the virtual booth link does not appear, for any reason, click the "Update Information" button at the bottom of the Troop Information screen and it should appear.

Also, on the "Troop Information" page, you can now set the beginning and end dates for accepting orders for this Virtual Booth Sale, and then use the Troop Secured Booth you just setup to have customers pick-up their orders on that date and time period:

Troop Virtual Booth

Please set the Begin date and End date for your troop's virtual booth sale. Once these dates are saved, your virtual booth link will appear at the bottom to share with your friends and family via email or social media.

Begin accepting sales
11/4/2020

End accepting sales
2/18/2021

Allow delivery for Virtual Booth Sale?
○ Yes ● No

Note: Below where you enter the beginning and end dates for accepting orders, there is an option to allow for the troop to deliver cookies to customers if they cannot come during the designated date and time setup in the Troop Secured Booth section. Simply click "Yes" to give the option for delivery, or click "No" if you require all customers to come to the location during the designated date and time.

Important! If you allow delivery, it will be up to the Troop to follow-up with the Customer to coordinate a drop-off date/time. The Customer is required to enter their full address, email, and phone number when entering a delivery order. This provides you with all the information needed to either approve/deny the order and follow-up with them. For Customers picking up at the designated location, they are required to enter only their phone number and email. If you are planning a delivery-only sale, you will need to call/email the Customer and ask for their address information.

Troop Approval Process for Virtual Booth Sales

Once the link is shared and orders start coming in for this Virtual Booth Sale, you will be able to see the order requests by hovering over "Booth" and clicking "View Booth Credit Card Payments":

At the far-left of the table, you will see a red highlighted box that says "Pending Approval". Click on the three stacked boxes to the far-right and you can review the details of the order and either approve or cancel the request.

When viewing the details of the order, make a note of the pick-up location and date at the top of the order, as well as, the customer information. You will need to compile all of the orders for each individual pick-up location to ensure you have inventory to fulfill them:

Once an order is approved, an email is sent to the customer notifying them that their order will be available at the designated location, at the designated date and time, for pick-up, and their credit card has been charged.

If an order is canceled, an email is sent to the customer notifying them that the order cannot be fulfilled by the troop and provides a link to shop using the direct ship method. No charges to customers will be applied for canceled orders.

Once all orders have been reviewed, you will navigate to "Reports" -> "Current" and run the "Booth Sale Credit Card Transactions Export". This report provides the detail of each order that needs to be filled, through a Planned Order, to have cookies on-hand for the designated pick-up day.

Once the booth sale has completed, you can return to the "View Booth Credit Card Payments" screen, locate the orders, and set the status to "Delivered". The customers will then receive an email confirming the order has been delivered. The final step is then to credit the sales to the individual Girl Scouts using the Smart Booth Divider (*refer to pages 40-42*) or T2G Transfers (*refer to page 16*).

Using the Booth Sale Divider

- Click on "Booth" -> "My Reservations"
- Scroll to the Booth table and find the booth sale you want to distribute packages for
- Use the gray scroll bar at the bottom to show the three stacked boxes and click on the one associated with the appropriate booth sale:

6 Results

ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL $	
01810	Dec 12	10:00 AM - 12:00 PM	☐	LOTTERY	WIN	0	0	⋮
01810	Dec 12	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0	⋮
01810	Dec 14	12:00 PM - 02:00 PM	☐	LOTTERY	WIN	0	0	⋮
01810	Dec 05	12:00 PM - 02:00 PM	☐	FCFS		0	0	⋮
02452	Dec 20	01:30 PM - 04:00 PM	☐	FCFS		0	0	⋮
01810	May 25	10:00 AM - 11:00 AM	☐	TROOP_SECURED	APPR	Booth Details · Smart Booth Divider · Remove Reservation		⋮

Show Confirmed Reservations ☑   Show Pending or Denied Reservations ☑   Booths left to distribute ☑

- Click on "Smart Booth Divider" and the following page will appear:

- Enter the number of packages, by cookie variety including CShare/Donations, then click "Save and Distribute Sales" to continue:

- Once you click on "Save and Distribute Sales"; the following window will appear:

- Select the Girl Scouts who participated in a booth sale to distribute packages to and click "Continue"; the following page will appear:

Booth Summary (Packages)

Fake Booth
123 Main Street
Andover MA, 01810
Thursday, October 21
01:00 PM - 04:00 PM

	Total Left to Distribute	Total Distributed	Total Sold
	4	**38**	**42**
	You MUST distribute all the packages sold to the girls in your troop.		$210.00

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
5	4	3	6	1	4	8	6	4	1

Cancel Distribution   Edit Booth Sales

2 Girls

GIRL NAME	CShare	ADV	TY	LEM	SB	TM	PBP	CD	PBS	GFC	PACKAGES SOLD
Test Girl	2	2	1	3	0	2	4	3	2	0	19
Test Two	2	2	1	3	0	2	4	3	2	0	19
Packages left to Distribute	1	0	1	0	1	0	0	0	0	1	4
Troop Total	4	4	2	6	0	4	8	6	4	0	38

Note: The Smart Booth Divider will split the packages evenly among the number of Girl Scouts selected. In this example, 42 packages total were to be distributed, 38 were actually distributed (or 19 per girl) and 4 are left over to distribute as the totals did not work out evenly for all cookie varieties.

- If there are red boxes left after automatic distribution (*see above screenshot*), you can manually add packages by clicking the boxes for each affected variety, for each Girl Scout
- After you have made the decisions, the table should look like this:

GIRL NAME	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	PACKAGES SOLD
Test Girl	2	2	1	3	1	2	4	3	2	1	21
Test Two	3	2	2	3	0	2	4	3	2	0	21
Packages left to Distribute	0	0	0	0	0	0	0	0	0	0	0
Troop Total	5	4	3	6	1	4	8	6	4	1	42

- Click "Save" to complete the distribution; you should receive a box that tells you the distribution was successful

At the bottom of the "Booths" -> "My Reservations" page, you can now see the total distributions to date, by variety, dollar amount, and total packages sold:

Booth Sale Summary

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
5	4	3	6	1	4	8	6	4	1

TOTAL BOOTH SALES: **$210.00**   TOTAL PACKAGES SOLD: **42**

Distribute Total Booth Sales

Take Booth Credit Card Payment

The ability to accept credit card payments via Smart Cookies at booth sales is only available once the troop enters their booth sale into Smart Cookies, and is only available on the day of the booth sale. Credit Card payment via Smart Cookies is available in both the Troop Cookie Coordinator and Girl roles.
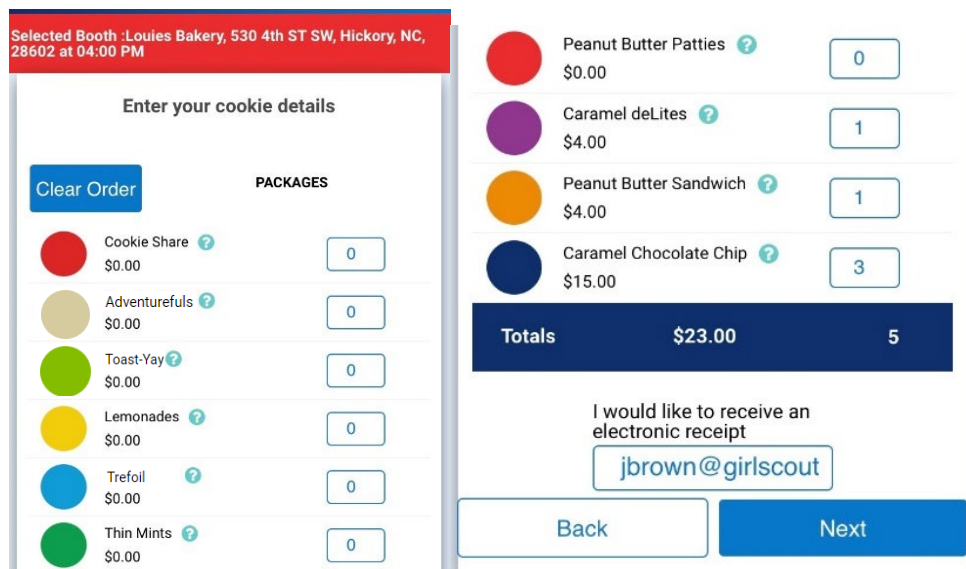
The two options in the "Booth" section are:

1. Take Booth Credit Card Payment; and,
2. View Booth Credit Card Payment – allows you to see all previous payments made at booths
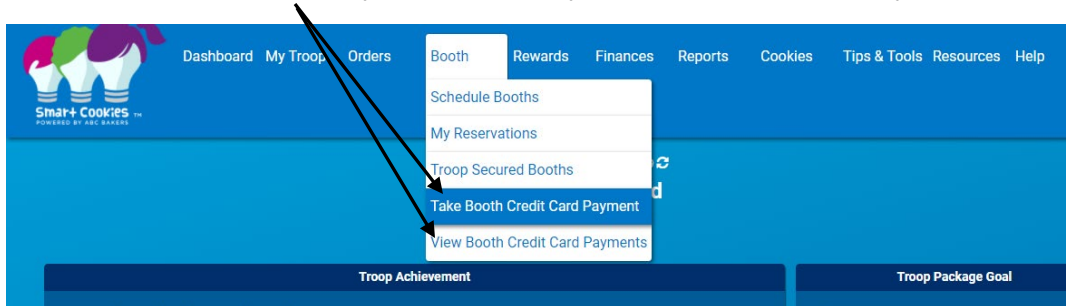
To record a Credit Card payment at a Troop's booth:

1. Click "Take Booth Credit Card Payment"; a list of the booths assigned to the troop will appear
2. Click on the circle next to the appropriate booth sale
3. Click "Apply" and the order page will appear:

4. Enter the packages sold, by variety

Note: Customers can receive an email receipt (optional) by providing their address to the troop.

5. Click "Next"; credit card entry fields will appear
6. Scan (using Safari browser on Apple devices) or manually enter the customer's credit card information into the fields:

7. Click "Pay Now"; a confirmation screen will appear when completed:

Important! The reminder will appear letting the customer/troop know that credit card information is not saved.

Rewards

Recognition Orders need to be created so the Girl Scouts receive all of their earned recognitions based on what they sold. *Refer to page 16 for the "Troop to Girl" (T2G) transfer process as the primary way for Girl Scouts to receive credit for selling.*

Note: The system automatically calculates MOST of the recognitions in the incentive program. Council has special recognitions that cannot always be calculated within the system.

Recognition Order

Note: Creation of the order is a one-time process. Once an order is created, you will not need to go back to the "Recognition Order" page. You would only be using the "Manage Recognition Orders" page after this time.

- Your troop number will be displayed at the top of this page; you will just need to select the "Order Type" which is always "Main":
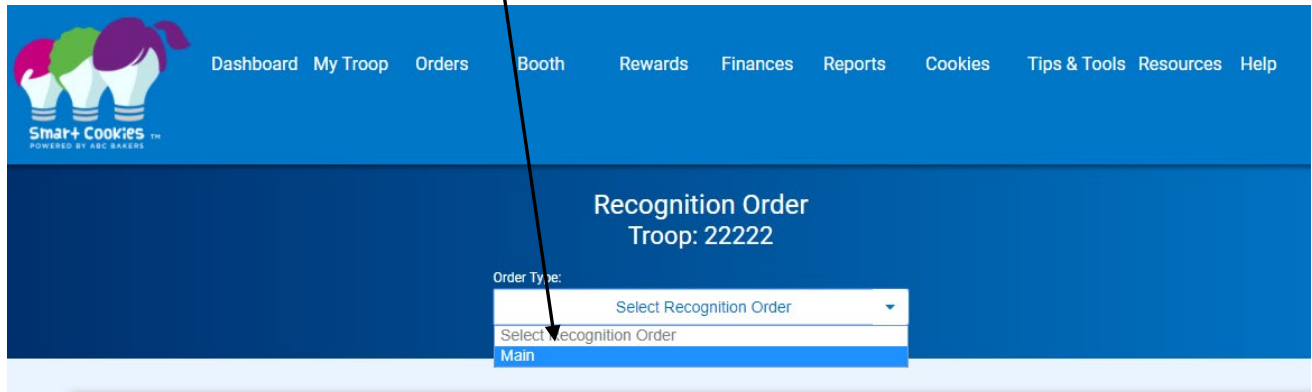
- Once selected, you will see a list of Girl Scouts and possibly a '!' icon next to anyone to tell you an action must be completed for that particular Girl Scout:
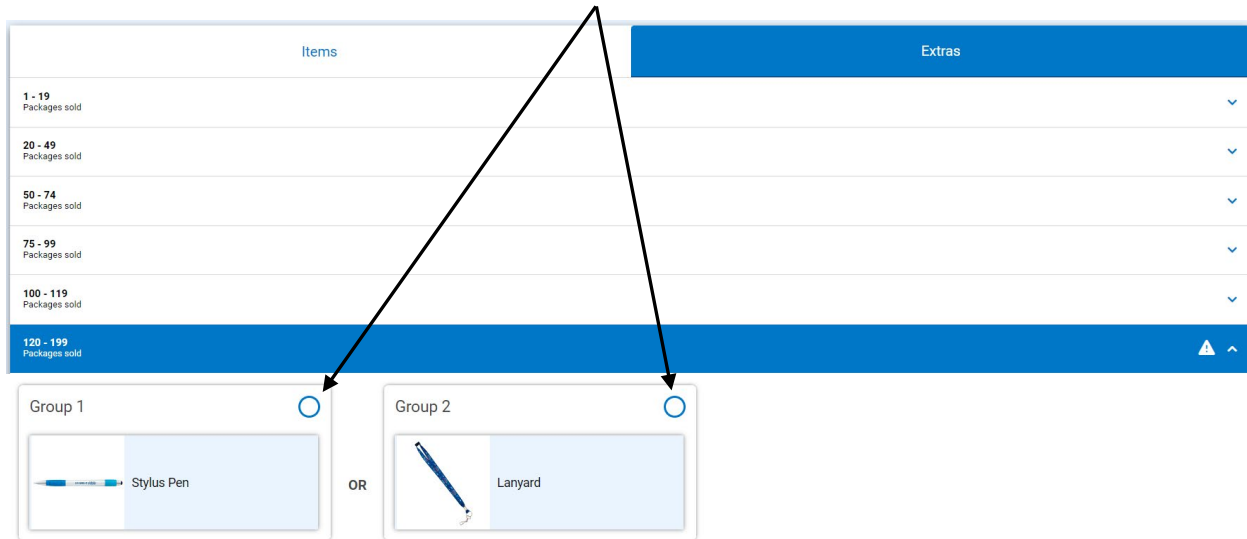

- Click the arrow icon to the far-right and this will open the Girl Scout's recognition summary:

- The '!' icon will appear again to let you know which level(s) needs the action taken:

Items	Extras
1 - 19 Packages sold	˅
20 - 49 Packages sold	˅
50 - 74 Packages sold	˅
75 - 99 Packages sold	˅
100 - 119 Packages sold	˅
120 - 199 Packages sold	⚠ ˄

Group 1 ○		Group 2 ○
Stylus Pen	OR	Lanyard

Note: In this case, a choice needs to be made. Click on the radio button to select which recognition the Girl Scout would like. If a size is needed (for a T-Shirt/Hoodie), the '!' icon will remain there until it is chosen. Once all selections are complete, the '!' icon disappears.

- Click "Save" to back out of the choices and return to the level page. Click "Save" again to finalize this Girl Scout's recognitions and then click the "Recognition Order" button on the top-left of the page to return to the Girl Scout listing:

❮ Recognition Order

lilly cookie
Number Of Packages Sold Per Girl: **170**
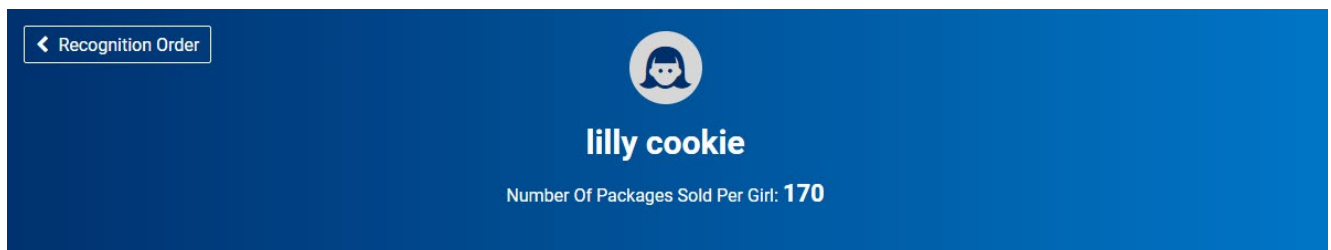
Note: The Girl Scout listing also allows you to see which orders have been reviewed by denoting each one with "UNREAD" if it has not yet been viewed. To view, simply click the arrow to the far-right, as with the order above, and review anything entered for each Girl Scout:

	lilly cookie	Packages sold: 170	❯
	Membership Test	Packages sold: 0	UNREAD ❯
	rose cookie	Packages sold: 0	UNREAD ❯

Click the "Manage Recognition Orders" button when done to see the status of the order and make note of this, as this is the page you will return to if any changes are made to Girl Scouts.

Recommended: Come here periodically, throughout the program, as sales are entered for Girl Scouts, so you can track their progress and make any decisions requiring your action.

Manage Recognition Orders

After the initial creation of the recognition order, you will be using the Manage Recognition Orders page from here on out.

A table will appear on this page which lists the recognition order that has been created:

	District	SU	Troop	Type	Date	Number	Status	
☐	No Specified District	Abington	22222	Main	November 5, 2018	0000004	COMPLETE	✏

The Recognition Order table will include:

- **District** (if applicable) – this is a collection of multiple Service Units (towns) which act as a single entity
- Service Unit **(SU)** – alternate name for the town
- **Troop** (number)
- (Order) **Type** – always "Main"
- (Order) **Date**
- (Order) **Number**
- **Status** – there are multiple statuses the order can have:
  - **INCOMPLETE** – means an action needs to be taken before the order can be completed, such as a recognition choice or size needs to be selected
  - **COMPLETE** – means all actions have been taken and no changes have been made to Girl Scouts; no further action needed at this time
  - **S** – committed by Service Unit
  - **D** – committed by District
  - **C** – committed by Council; this will only happen at the end of the sale after all deadlines have passed and Council is ready to send all orders to vendor for fulfillment – after this time, no changes can be made to the orders

On this page, you can also click the pencil icon to the far-right to edit. Repeat the prior steps to edit/review the order.

Finances

Financial Transactions

The financial transactions page has two tabs:

- **Troop Transactions** – shows all payments for troops that have been received by Council, such as through ACH
- **Girl Transactions** – shows all payments entered by troops for Girl Scouts they have received money from

See Troop Transactions table below:

Payments listed here are controlled by Council and are updated based on any money received by Council for the troop. <u>These payments directly affect the troop's balance due.</u>

Note: There is a direct link below the table for the <u>"Troop Balance Summary Report"</u>. This report shows all of the activity for the troop, including order details and payments made.

See Girl Transactions table below:

Manage Financial Transactions

Troop Transactions | **Girl Transactions**

Drag a column header here to group by that column

Search...

Transaction #	District	Service Unit	Troop	Girl	Date	Payment Me...	Amount	Ref #	
0000001	No Specified District	Abington	11111	Test Girl	10/26/2017	Check	$100.00		✏ 🗑
0000003	No Specified District	Abington	11111	Sample Girl	11/1/2017	Check	$100.00		✏ 🗑
							Sum: $200		

👤➕ Add Girl Transaction

To review all troop balances, please refer to the following report: Girl Balance Summary Report

Note: This process is completely optional, you only have to record Girl Scout payments if you choose to do so through the system. These payments have NO effect on the overall troop balance, but they do effect the individual Girl Scout(s)' balance, which can be seen in the "Girl Balance Summary Report" (quick report link below table).

To add a Girl Scout payment:

- Click "Add Girl Transaction"; the following window will appear:

Add Girl Transaction

Girl*
(Choose)

Type*
Select Transaction Type

Payment Method*
None

Transaction Date*

Amount*

Reference

Notes

Save Close

- Select a Girl Scout from the "Girl" drop-down
- Select the "Type" – Payment
- Select the "Payment Method" – Cash, Check, or Credit Card

- Enter the "Transaction Date"
- Enter the "Amount"
- Enter a "Reference" (optional)
- Enter "Notes" (optional)

- Click "Save" when finished; the table will update with the payment

Reports

Current

Selecting a report:

- Click the report category in the "Report Categories" box
- Select the report in the "Reports" box:

Note: You can hover over "Preview It" to see the report format, or "Report Info" gives a short description.

- Click "Go to Report" button
- Go through the filters to select the options that work for you

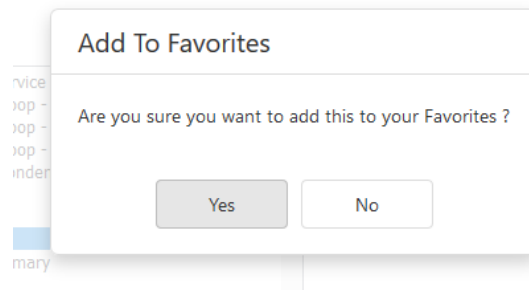Recommended: "Unit of Measure" should be "Packages" only.

- Click "View Report" to see the report, "Go to Report Listings" to go back to previous page, or "Reset" to set the filters to their default values


List of Helpful Reports:

- Summary Reports
  - **Financial Transaction Summary** – lists all financial transactions associated with the troop
  - **Girl Balance Summary** – shows all packages assigned to a Girl Scout and any payment entered
  - **Girl Cookie Totals Summary** – shows all packages currently assigned to every Girl Scout in the troop, in a summarized chart
  - **Mobile and Ecard Summary** – shows all online activity associated with the troop (e-cards sent to potential customers, packages purchased online by variety, etc.)
  - **Recognition Order Summary By Girl** – list all recognitions earned by the Girl Scouts in a summarized report; matches the Recognition Order entered in the system
  - **Transfer Order Summary** – shows all transfers in the system (T2G, G2G, G2T, T2T, C2T)
  - **Troop Balance Summary** – shows all activity for the troop (orders, transfers, troop proceeds, total amount due to Council, total sales, payments, and current balance due)
  - **Troop On Hand Inventory** – shows the amount of packages left to assign to Girl Scouts in the system
  - **Booth Sale Credit Card Transactions Export** – lists all of the transactions associated with Virtual Booth Sales for compiling into Planned Order(s) for fulfillment

Setting Favorite Reports

- Select the report category
- Select the report
- Click the "Add to Favorites" button
- A prompt will appear asking if you want to add the selected report as a Favorite:

- Click "Yes" and it is added to box above the "Report Categories" and "Reports" boxes:
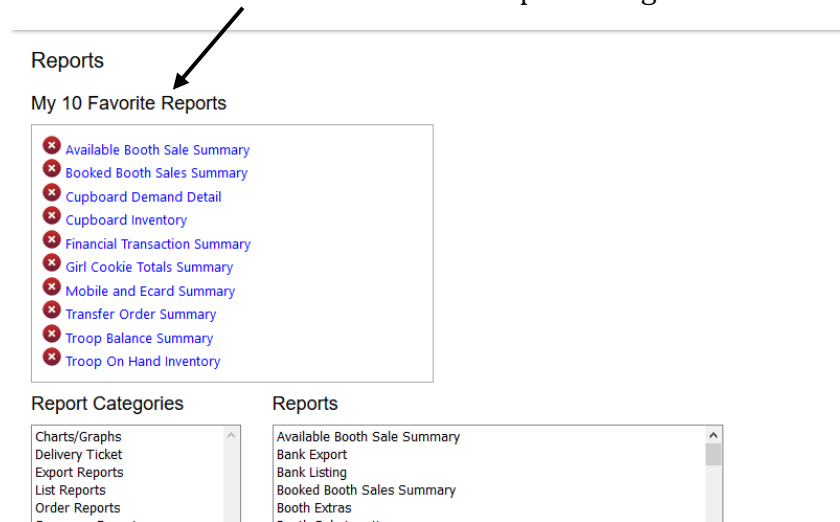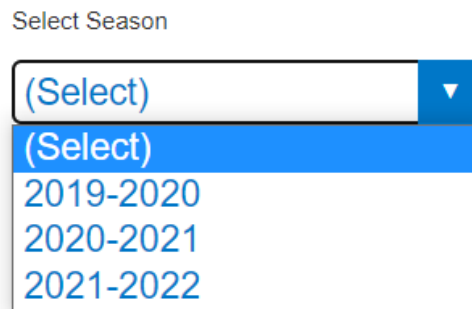

Archived Reports

Selecting an archived report:

- Select the season (reports can be accessed for last three years):

- Click "Next"; the "Report Categories" and "Reports" boxes appear
- Select a category and report
- Click "Go to Report"

- Go through the filters to select the options that work for you

Recommended: "Unit of Measure" should be "Packages" only.

- Click "View Report" to see the report, "Go to Report Listings" to go back to previous page, or "Reset" to set the filters to their default values

Help

The help page has contact information for technical issues directly to ABC Bakers, the vendor for Smart Cookies, as well as, a Frequently Asked Questions page and a link to submit an inquiry to the vendor:

Help

Need help using the Smart Cookies platform?

Call us at **1-800-853-3730** or email us at **ABCSmartCookieTech@hearthsidefoods.com**

Questions about our cookies?

Check out our **Cookie FAQ's** or email us your questions or concerns at **ABCSmartCookieBakers@hearthsidefoods.com**

Note: If you have specific questions about the program and are not sure who to reach out to, contact customercare@gsema.org and they will make sure it gets to the appropriate person for follow-up.