



Troop User Guide

Contents

Getting Started in Smart Cookies	4
Registration	4
	4
Logging into Smart Cookies	4
Switching Roles in Smart Cookies	5
Troop Dashboard	5
Navigating Smart Cookies	6
My Troop	7
Troop Roster	7
Troop Information	9
Orders	10
Initial Orders	10
Orders by Cookies	10
Manage Orders	11
Filtering Orders	11
Transfer Order	12
Troop to Girl (T2G) Transfers:	13
Girl to Girl (G2G) Transfers	13
Girl to Troop (G2T) Transfers:	14
Troop to Troop (T2T) Transfers	14
Planned Order	15
Virtual Cookie Share	16
Troop Shipped Orders (imported from Digital Cookie)	16
Booth	17
Schedule Booths	17
Making Selections	17
My Reservations	20
Using the Smart Booth Divider	20
Troop Site Orders in Digital Cookie	23
Rewards	24
Recognition Order	24
Manage Recognition Orders	26
Finances	26
Financial Transactions	26
Add a Girl Scout Payment:	27
Reports	29
Current	29

Setting Favorite Reports	30
Cookies	30
Safety and Training	
Smart Cookie Training	30
Safety	30
Resources	30
Help	30

Getting Started in Smart Cookies

Registration

Troops and users are uploaded into Smart Cookies by the council and an email from noreply@abcsmartcookies.com will be sent. Volunteers are encouraged to add the email address to your safe sender list. If you do not receive your registration email, contact your council as directed.

- Click the unique link in your email.
- Complete all required fields. Some fields may be prepopulated.
- If any information is incorrect, contact your council as directed.

Dear Girl Scout Volunteer,

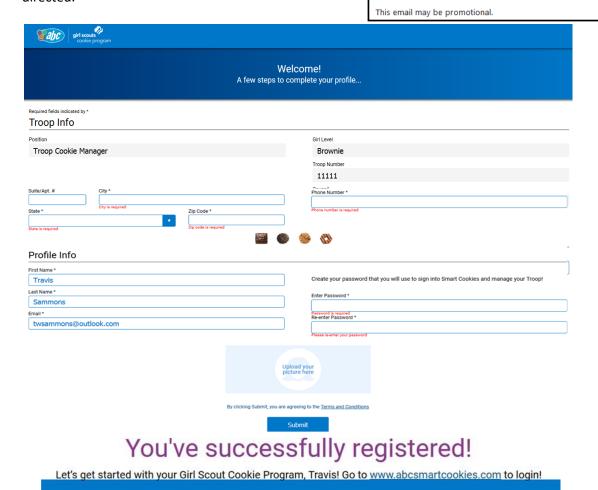
Girl Scout Cookie season is starting soon! To help you get ready for a great cookie season please set up your account and register on the ABC Smart Cookies website, click the link below to get started:

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!

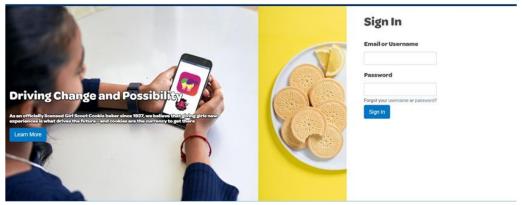
Thank you,

The ABC Smart Cookies Team

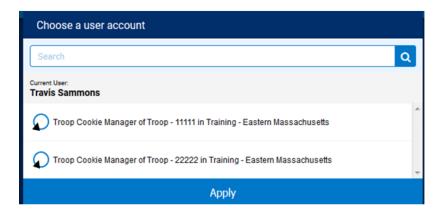


Logging into Smart Cookies

- Go to <u>www.abcsmartcookies.com</u> (bookmark for easy access during sale).
- Username is your email and the password you selected during registration.
- If you forget your password, use the forgot password link.



- Choose your role if applicable. If you only have one role, then you will be sent directly to your user dashboard.
- If you have multiple roles, click the button next to the role you will use in this session and click Apply.



Switching Roles in Smart Cookies

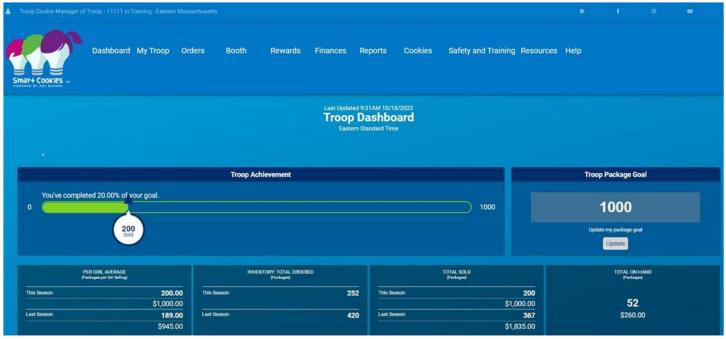


- Click on the person icon in the upper left corner of the page
- Choose Switch User
- The Choose a User Account pop up will appear choose a role and click Apply

Troop Dashboard

The Troop Dashboard provides an overview of all activity for your troop. A good practice anytime you are completing tasks in Smart Cookie is to "Refresh" your Troop Dashboard regularly to help the system update to reflect quicker. Please note that it can take up to 15 minutes for information to update and reflect in Smart Cookie, so refresh often.

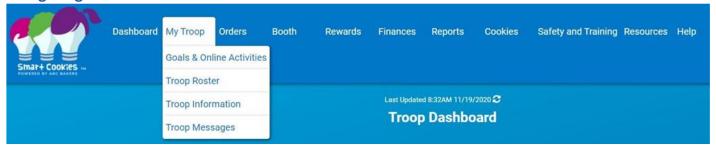




Set a troop goal and watch the troop achievement bar progress as cookies are assigned to Girl Scouts in the troop. Key stats include:

- 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 (sold indicates cookies assigned to girls)
- Total On Hand (in packages) number 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 (if applicable)
- Girls Registered and Selling 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 Sale Details by Channel (cookies transferred to them; shipped, booth credit); by Cookies (varieties), Financial Responsibility (showing amounts due, paid and balance)

Navigating Smart Cookies



There are multiple tabs shown on the troop dashboard with action items under each tab. Click on the tab and the action item to move to that area of Smart Cookies.

- Dashboard
- My Troop
 - Troop Roster

- o Troop Information
- Orders
 - Manage Orders
 - Troop Initial Order
 - Transfer Order
 - o Planned Order
 - Virtual Cookie Share
 - Troop Direct Ship Orders
- Booth
 - o Schedule Booths
 - My Reservations
 - Troop Secured Booths
- Rewards
 - Manage Recognition Orders
 - Recognition Order
- Finances
 - Financial Transactions
- Reports
 - o Current
 - Archived
- Cookies
- Safety and Training
 - Smart Cookies Training
 - Safety
- Resources
- Help

My Troop

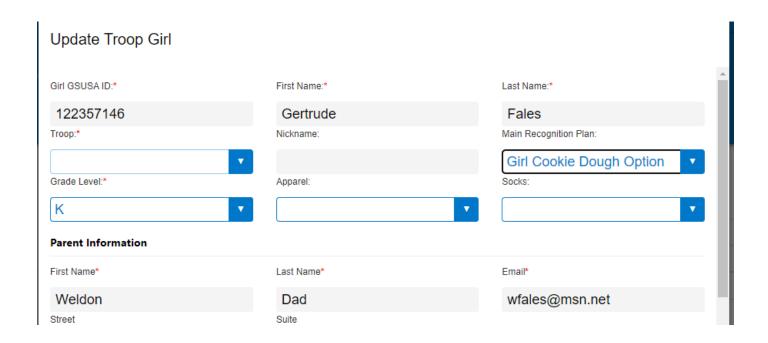
Troop Roster

The troop roster will display all of the Girl Scouts registered in your troop. *IMPORTANT NOTE: Girl registered in your troop in Smart Cookies will import into Digital Cookie. All corrections on the roster MUST be completed before your troop initial order is submitted.* Contact your council as directed for any additions or deletions to your roster. Limited edits can be made by clicking the pencil icon.

Manage Troop Girls



- Click on the pencil
- Edit the Main Recognition program (if applicable); Grade Level; Apparel and Sock sizes.
- Click Save

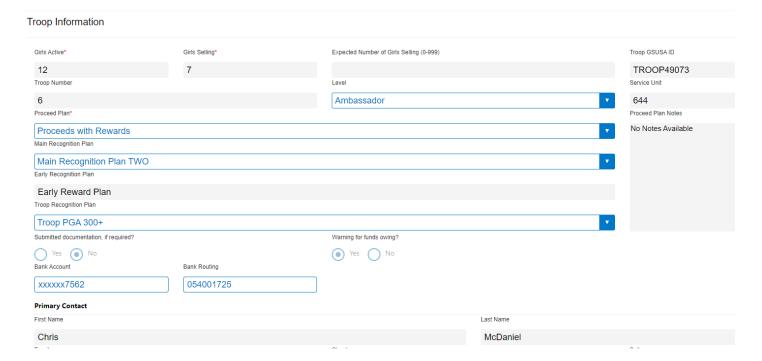


Promising Practice: Select apparel and sock sizes early in the sale to allow for auto-population when the recognition order is created.

Troop Information

Click on Troop Information to view. Information in shaded fields cannot be edited. Contact your council as directed to update. Based on your council set-up, you may have permission to do the following:

- View your program level
- Choose a Proceed Plan
- Choose a Main Recognition Plan
- Choose an Early Reward Plan
- View your troop Banking Information



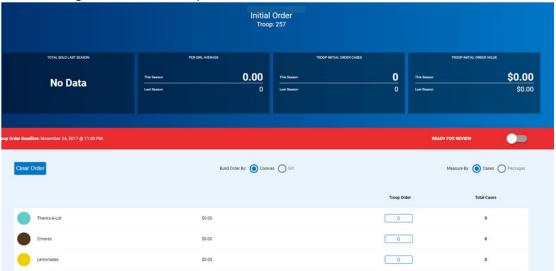
Orders

Initial Orders

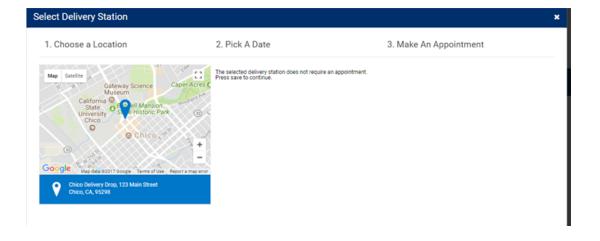
Initial orders are entered by Cookies. Follow your specific council instructions on type of order and dates due.

Orders by Cookies

Navigate to Orders>Troop Initial Order



- Enter the total number cases by variety.
- Click Save.
- Scroll down to Select Delivery Station.
- If you have a choice of locations, click the one you wish to attend for initial order pick up by clicking the blue bar.
- If prompted, pick a date and time for pick up.
- If you change your troop initial order before the deadline, you may have to select your delivery station again.



Manage Orders

The Manage Orders page reflects all cookie orders during the sale. Totals are rounded to full cases. The top section of the page details total amounts of cases during different phases:



- Planned Orders currently showing as saved not approved.
- Ordered Total amount of cases ordered by troop including troop initial order, transfers from cupboards or other troops, shipped packages; virtual Cookie Share and Damage Orders (if applicable).
- Sold Cookies assigned to Girl Scouts including Girl Initial Order (if applicable), transfers, Shipped, Virtual Cookie Share, Damage Orders (if applicable).
- On Hand Total amount of cases in troop inventory, but not yet assigned to a Girl Scout (ordered minus sold).
- On hand should equal ordered minus sold, but rounding can impact total.

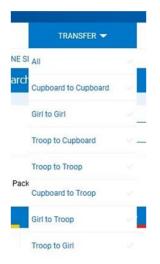
Filtering Orders

To view specific types of troop orders, use the filters located on the Manage Orders page.



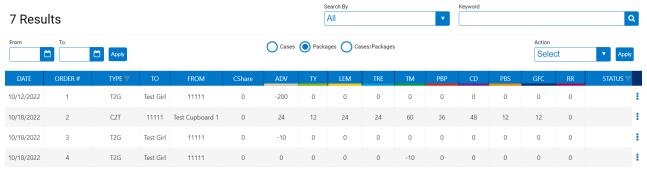
The types of filters are:

- All selects all available filters.
- Initial Order will display troop initial order.
- Planned will display any planned orders not yet approved.
- Restock not used at troop level.
- Transfer must select a specific type of transfer to display. Click the arrow next to transfer to display types.
- Damage not typically available for troops.
- Cookie Share show all cookie virtual cookie share orders including those from Shipped and booth sales.
- Direct Ship shows orders shipped directly to consumers from girl or troop links.
- CS Donation used and displayed only on Council level.



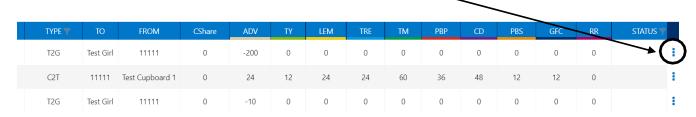
- Use the Refine Search feature to add more filters to see orders for specific girl(s) or from a specific cupboard.
- To display troop to girl or girl to troop transfers, you must select girls in the refine search field.
- After the desired filter(s) are selected, click Apply Search Parameters and the orders will appear in the table.
- Click Clear all filters to remove all of the selected filters and re-select.

The Manage Order table appears as follows:



Results are searchable by keyword, order number or date range. Orders can be displayed in cases, packages or cases/packages. All columns can be sorted by clicking on the header.

You can also view details of the order by clicking the ellipsis to the far-right of the order row



Troop level users can edit troop to girl, girl to troop orders and any troop to troop orders initiated by the troop user. Initial orders or planned orders can only be edited if deadline for submission has not passed. Damage orders entered by the troop can be edited (not common for troops to have permission to create damage orders). If there is an order displayed with T2G(B), you must edit that order by editing the Smart Booth Divider entries. See section on Smart Booth Divider for more information.

Transfer Order

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

- o Troop to Girl (T2G) transfers packages to Girl Scouts from the troop inventory
- Girl to Girl (G2G) transfers packages from one Girl Scout to another
- Girl to Troop (G2T) transfers packages back to troop inventory from a Girl Scout
- o Troop to Troop (T2T) transfers packages (and financial responsibility) to another troop

Once a transfer is complete, you can 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 Girl (T2G) Transfers:

- Select Troop to Girl in the Type of Transfer box.
- The From row will populate with your troop. On the To row, click the down arrow to select the girl receiving the packages.
- o Click Apply.



- Enter the number of packages, by cookie variety, to the Girl Scout in either the Packages or Booth Packages column.
- Packages column transfers packages to Girl Scouts with the financial responsibility attached.
- Booth Packages column transfers packages to Girl Scouts with no financial responsibility.
 - The best practice is to use the Smart Booth Divider to allocate booth packages sold. See section on Smart Booth Divider.
- Once the packages are entered, add any order notes and then click Save to complete the transfer.

Girl to Girl (G2G) Transfers

- Select Girl to Girl in the Type of Transfer box.
- o Click on the From row to select the Girl Scout to transfer from and click Apply.
- Click on the To row to select the Girl Scout to transfer to 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, add any order notes (optional) and then click Save to complete the 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 and click Apply. The To row will display your troop.



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

Troop to Troop (T2T) Transfers

- Select Troop to Troop in the Type of Transfer box.
- o Click on the FROM row to select the SU and Troop to transfer from; click Apply.
- Your troop will default to the TO Troop.



- o Put the number of packages you are transferring FROM the other troop, by cookie variety, in the Packages
- Once the packages are entered, add any order notes and then click Save to complete the transfer.

Note: Only the troop receiving the transfer can complete a troop to troop transfer. This is because financial responsibility transfers to the receiving troop for T2T transfers.

Once the transfer is saved in the system, all reports will be adjusted automatically.

Planned Order

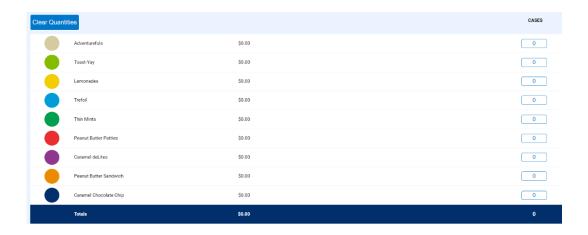
Planned Orders are cookie orders for pick-up at cupboard locations during the sale. To create a Planned Order:

- Navigate to Orders>Planned Orders.
- 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 and click Continue.
- Select the time and click Continue.



Please note the council required Unit of Measure (UOM) for planned orders. Orders may be placed in cases, packages or cases/packages based on council settings.

o Enter the number desired, for each variety, in the boxes shown:



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

You can print a receipt for the order at this time. Planned orders will show as saved until the order is picked up and the cupboard manager has approved. Once the order is approved it will show as a cupboard to troop transfer on all troop records.

Virtual Cookie Share

Virtual Cookie Share orders are designated as donation cookies and are ADDED to your troop's sales. The troop is financially responsible for these cookies. Troops will not have to manage the physical inventory for these packages. Your council will process orders and deliver cookies.

- Click Orders>Virtual Cookie Share.
- o Enter the number of donation packages for each girl.
- Add any desired order notes.
- Click Save.



If cookie share cookies are sold at a booth, enter the package quantity in the Smart Booth Divider and cookie share order for the troop will be created. (see pg. 21 - Smart Booth Divider)

Troop Shipped Orders (imported from Digital Cookie)

All orders from the troop ship only link will appear under this section. It is recommended you check-in periodically to make sure there are no orders that are Pending distribution.

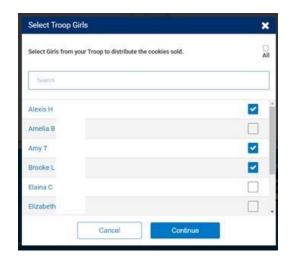


- Navigate to Orders>Troop Ship Orders.
- o Orders shown as Pending Distribution will be totaled at bottom of screen.
- Click Distribute Orders to girls.



Distribute orders to girls

- Select the Girl Scouts to allocate packages.
- Click Continue to display allocation grid.





- Adjust each girl totals by variety to clear any red boxes shown.
- Click Save.
- o Troop Ship Orders will now display as distributed.
- Insure all orders are distributed before the end date of the sale.

Booth

Schedule Booths

Lottery Booths will take place at the service unit level. Please contact your Service Unit Cookie program Advisor for information on Booth lotteries in your area. There are multiple ways to schedule a booth sale in Smart Cookies. Depending on your council set up, the following options may be available:

• First Come First Serve – based on criteria set by the council, troops pick locations/times for a booth sale. Troops are awarded selections immediately.

Making Selections

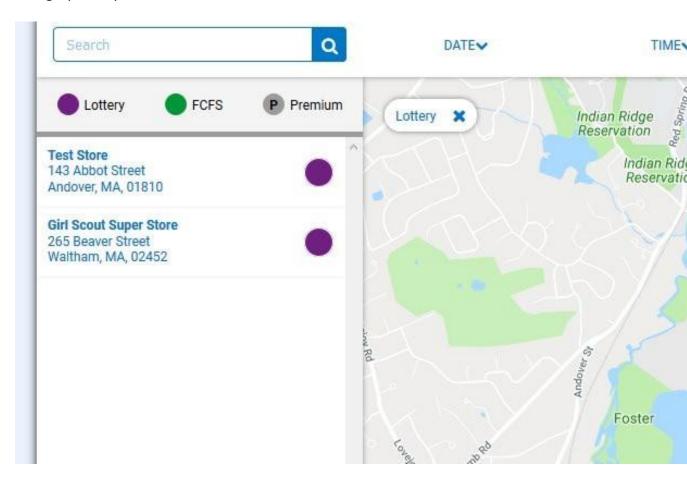
To make selections in the First Come First Serve (FCFS):

- Click on Booth>Schedule Booths.
- A banner will display type of schedule available and details.

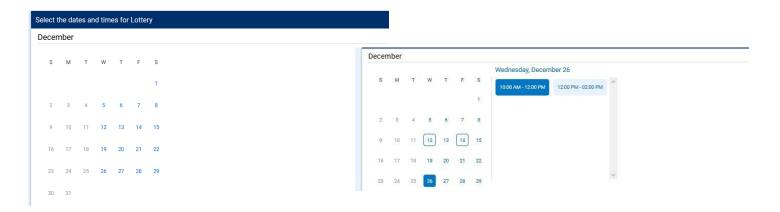




• A list of location available for selection appear to the left and a Google map displays to show locations. Based on council settings, you may not see all locations.



- Use additional filters to narrow your search.
- 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 all available times will appear.
- Click on a time slot to request.



- During the lottery, you can make multiple selections from this screen. Assignments will be selected during the random lottery and troops are notified via email.
- During FCFS, you must return to the selection screen to secure additional selections. Selections made will be assigned to the troop immediately.

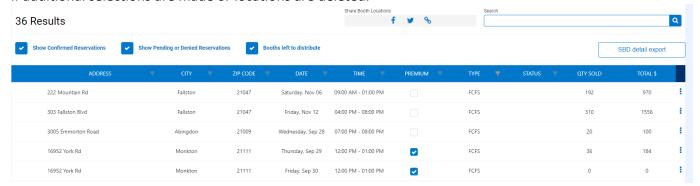
- Once all selections have been made, click Save.
- Return to the selection screen if you want to make choices at different sites.

My Reservations

From the My Reservations page, you can view all activity related to booths including I FCFS reservations, reservations made by council and troop secured locations. From the top section, you can also filter to only show a specific type of booth. Most troops will want to display all locations.



• First Come, First Serve – will display the number of reservations made to date. Will update throughout the sale if additional selections are made or locations are deleted.

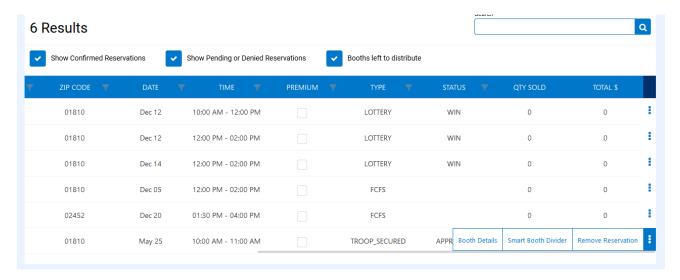


- Click the ellipsis at the end of a row for the following actions:
 - Booth Details
 - Smart Booth Divider
 - Remove Reservation

Using the Smart Booth Divider

- Click on Booth>My Reservations
- Scroll to the Booth table and select the booth to enter sales.
- Click the ellipse to open the menu

• Click on Smart Booth Divider

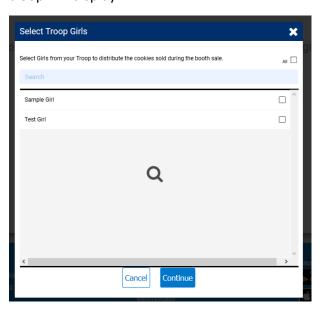




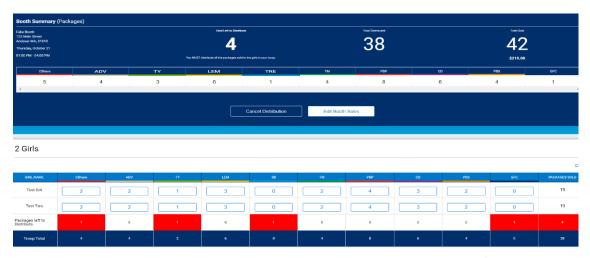
- Enter the number of packages, by cookie variety including Cookie Share.
- Click Save and Distribute Sales to continue.



A list of all Girl Scouts in your troop will display.



• Select the Girl Scouts who participated in a booth sale and click continue.



- Smart Booth Divider will split the packages evenly among the number of Girl Scouts selected.
- Packages remaining after automatic distribution will display in red.
- Add packages to each girl to clear the remaining packages.

GIRL NAME	CShare	ADV	TY	LEM	TRE	ТМ	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 will see a pop-up notification of a successful distribution.
- Troop to Girl (T2GB) transfers will be created and will display on the manage orders grid.

The totals shown on the bottom of the page will represent all booth sales sold and distributed.



If at any time you need to edit a booth distribution, you can return to the Smart Booth Divider Screen and cancel the distribution and redistribute the cookies to Girl Scouts. At the conclusion of your sale if you wish to divide ALL Booth sales at one time, you can distribute all booth sales by clicking the Distribute Total Booth Sales. This will cancel all previous distributions, but keep all totals sold for each booth.

Troop Site Orders in Digital Cookie

Once a troop has set up the troop site in Digital Cookie, the troop can offer delivery orders or pick-ups at exiting booth sales. Please see instructions below on how to view orders and allocate to girls. These orders will be managed in the booth reservations section of Smart Cookies using the Smart Booth Divider.

Troop Orders for Delivery

To view orders in Digital Cookie, run the All Orders Report and filter for orders with the first name Troop XXX and last name site. These will be orders generated from the troop link. Only orders approved by the site lead will import into Smart Cookies. You can view orders in the Smart Cookies Booth Credit Card Payment Export report and filter for delivery orders.

Click on the ellipse at the end of the row and use the Smart Booth Divider to allocate the cookies to girls. Once this has been completed the inventory will be removed from the troop available inventory.

Booth - Troop Reservations page:



Troop Orders for Pick-Up

To allow for pre-paid pick up orders, the troop must "add pick up option" to any booth displayed in Digital Cookie. Orders can be viewed by running the Booth Credit Card Payment Export and filtering for the location date and time.

Type	₩.	Transactio	CreatedUs Cust	omer Custome	rlCanTextCu	Amount	Location	Address	ReservationDate	Reservation	Status	TimeStam	CShare	ADV	TY	LEM	TRE	
Pick Up		80594180			No	6	Test	143 Abbot	12/5/2023	12:00 PM	Approved	16:37:49	0	1	C) ()	O
Pick Up		80594239			No	6	Belmont 0	79 Leonar	12/5/2023	07:00 PM	Approved	20:38:38	0	C	C	0)	O
Pick Up		80594244			No	12	Belmont (79 Leonar	12/5/2023	07:00 PM	Approved	20:38:40	0	1	C	0)	ð
Pick Up		80594255			No	24	Belmont 0	79 Leonar	12/5/2023	07:00 PM	Approved	21:07:39	0	C	C) ()	O
Pick Up		80594259			No	24	Belmont 0	79 Leonar	12/5/2023	07:00 PM	Approved	21:07:40	0	C	C) ()	O
Pick Up		80594277			No	12	Belmont 0	79 Leonar	12/5/2023	07:00 PM	Approved	21:23:11	0	C	C) ()	1

Once these orders have been picked up, the troop must add the total packages to the packages sold to walk-up customers at the booth. Example: Pick Up orders totaled 2 ADV, 6 TM and 7 CDL. The troop sold an additional 25 packages of TM and 10 CDL at the booth. The totals entered in the Smart Booth Divider would be 2 ADV, 31 TM and 17 CDL. Distribute using the Smart Booth Divider.

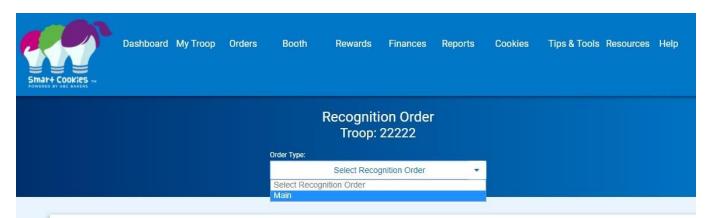
Rewards

Recognition Orders must be created so the Girl Scouts receive all of their earned recognitions based on sales and booth credit. Your council may have an early recognition, main recognition plan and troop recognition plan. Refer to your council's instructions on what types of plans are available.

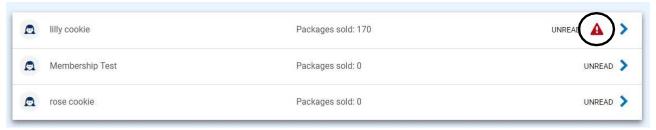
Recognition Order

Troops must create the recognition order on or before the council published due date for recognitions. The order will automatically assign each girl the earned recognitions once the order is created. Once an order is created, the troop can go back through to the Manage Recognition Orders screen to edit the order.

- Navigate to Rewards>Create Reward Order.
- Select the Order Type available type will depend on council set up and dates.



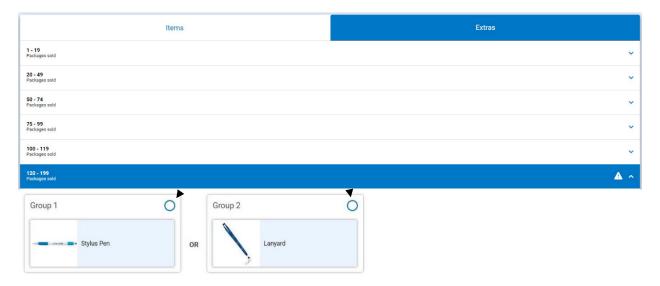
- Once you select the order, the system will generate the recognition order.
- If a red triangle appears on any row, action is required to complete the order. The actions are either a choice between multiple items or sizes for apparel.



Click the arrow icon to the far-right to open the Girl Scout's recognition summary.



• Click the down arrow on the level indicated and complete the choice or size.



- Click on the button to select which recognition the Girl Scout would like or the correct size for apparel items.
- Once all selections are complete, the '!' icon disappears.
- Click Save to finalize this Girl Scout's recognitions and then click the Recognition Order button on the top-left of the page to return to troop listing.



Any girl recognition orders marked unread do not have to be opened to save or submit the order.

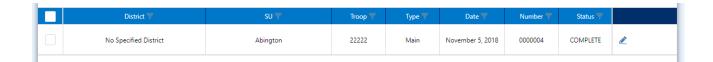


Promising practice is to wait to create the recognition order until after all transfers to girls are complete. If the
order is created earlier and additional transfers are made, the order will update to award the girl(s) any
additional recognitions. This may trigger a need to review needed action items.

Manage Recognition Orders

Once an order is created and saved, any changes must be managed through the Manage Orders page.

Navigate to Reward>Manage Recognition Orders.



The Recognition Order table will include:

- Type Early, Main or Troop
- Date order was originally created
- Status
 - o INCOMPLETE means an action needs to be taken, such as a recognition choice or size selection
 - o COMPLETE means all actions have been taken and no further action needed at this time
 - T submitted by the troop
 - o S submitted by Service Unit
 - o C submitted by Council

The following icons are available during the sale on the recognition grid:

- Pencil order can be edited by troop up to the stated due date
- Check Mark used by troop to submit the order. Once submitted troop cannot edit order
- Trash Can prior to the stated due date, the troop can discard the order and start over.

Finances

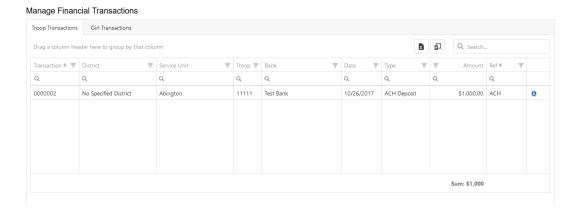
Financial Transactions

The financial transactions page has two tabs:

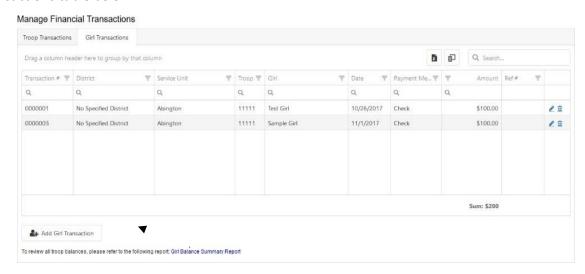
Troop Transactions – shows all payments for troops that have been received by Council, such as ACH payments, ship only payments, girl delivery and booth credit card payments. All troop financial transactions are locked and may not be edited by troops or SU volunteers.

Girl Transactions – shows all payments credited to each Girl Scout including payments posted by the troop (cash and checks turned in), girl delivery credit card payments, ship only payments.

See Troop Transactions table below:



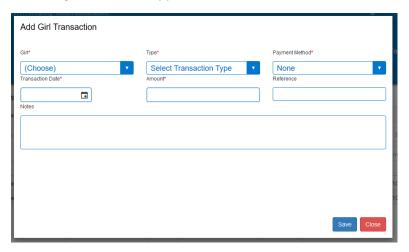
See Girl Transactions table below:



Follow your council recommendations on posting Girl Transactions. Posting the payments turned in by girls will not affect the amount owed to the council by the troop, but will populate the Girl Balance Summary report. Girl Delivery and Ship Only credit card payments will automatically flow into Smart Cookies for each Girl Scout.

Add a Girl Scout Payment:

• Click on Add Girl Transaction; the following window will appear:



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

 Credit card payments are troop or council managed cards payments from Digital Cookie will automatically post to each girl
- Enter the Transaction
- Enter the "Amount"
- Enter a "Reference" (optional)
- Enter "Notes" (optional)
- Click Save

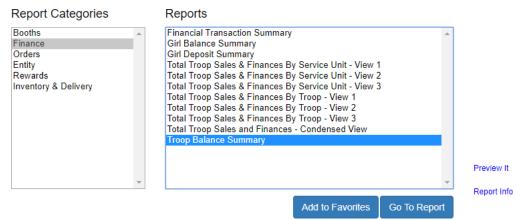
Reports

Report Criteria

Current

Current reports display information for the current sales year.

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



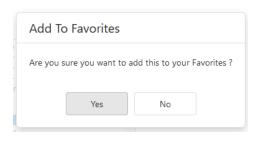
• Click "Go to Report" button

Girl Cookie Totals Summary Diamonds of Arkansas, Oklahoma and Texas Council District Reggie's District SU 212 ServiceUnit 2123 Girl Name All Order Type Packages Unit Of Measure Select View Type PDF Go to Report Listings

- District (if applicable), SU and troop will appear in all report filters. Additional filters are available for all reports.
- Recommend for most troop users to view reports in units of measure as packages and in PDF. Some reports (mostly export) will open in Excel.
- 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.

Setting Favorite Reports

- Select the report category
- Select the report
- Click the Add to Favorites button
- Click Yes to Add to Favorites. Up to 10 reports can be added for quick access.





Cookies

Click on this tab to view a cookie menu and learn more about each variety

Safety and Training

Smart Cookie Training

Links to library of Smart Cookie Training videos and PowerPoint presentations

Safety

Link to Troop Leader Resources of Safety in the Girl Scout Cookie Program

Resources

Links to art, forms, checklists, cookie calculator, Allergen Flyer, Rally Guide and Leadership Skills

<u>Help</u>

Information on how to access support for the Smart Cookies Platform