

2022-23 Service Unit Database Guide



Smart+ Cookies™
POWERED BY ABC BAKERS

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<https://abcsmartcookies.com/>

Gaining Access to Smart Cookies

One form needs to be received by Council in order to activate the Service Unit login email for Smart Cookies:

- [Service Unit Cookie Manager Volunteer Agreement](#)

If you also have a Troop role(s), the following two forms will need to be filled out as well:

- [Troop Cookie Manager Volunteer Agreement](#)

Once all 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:

Required fields indicated by *

Service Unit Info

Position: Service Unit Cookie Manager Council: Training - Eastern Massachusetts

District: No Specified District



Contact Info


Home Address *
Address is required

Suite/Apt. # City *
City is required

State * Zip Code *
State is required Zip code is required

Fax (Optional)

Phone Number *
Phone number is required




Profile Info

First Name *
Travis

Last Name *
Sammons

Email *
tsamm426@gmail.com

Create your password that you will use to sign into Unit!
Enter Password *
Password is required
Re-enter Password *
Please re-enter your password



By clicking Submit, you are agreeing to the [Terms and Conditions](#)

Submit

Required Fields (some may be pre-filled; check for accuracy):

- Home Address
- City
- State
- Zip Code
- Phone Number
- First Name
- Last Name
- Email
- Enter Password
- Re-enter Password

Once all fields have been filled out, click "Submit".

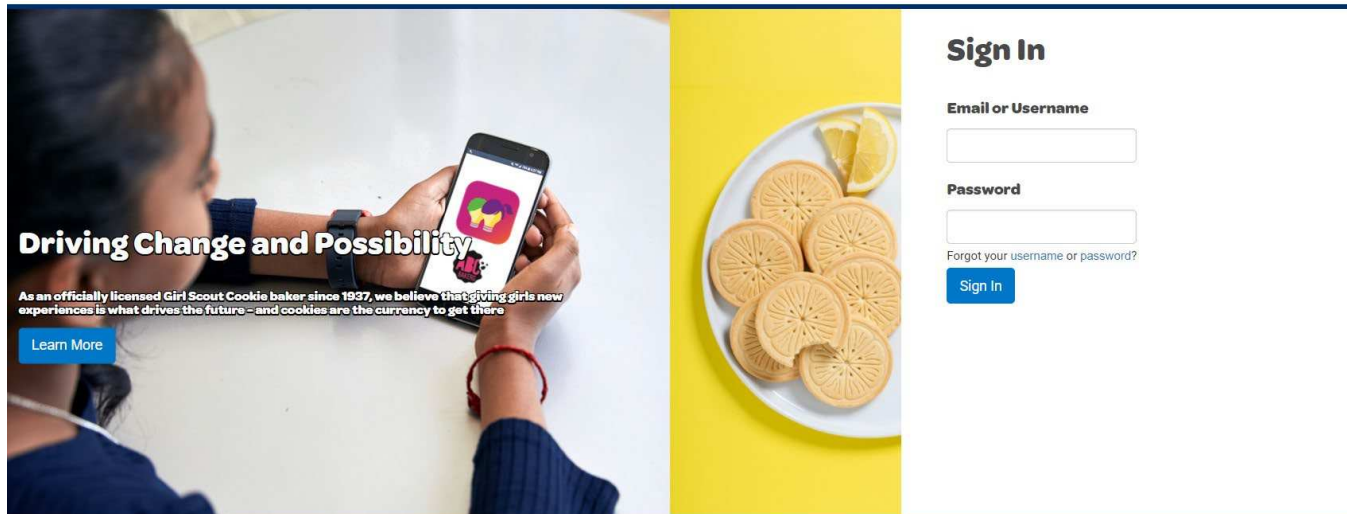
After you click "Submit", a confirmation page will appear:

You've successfully registered!

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

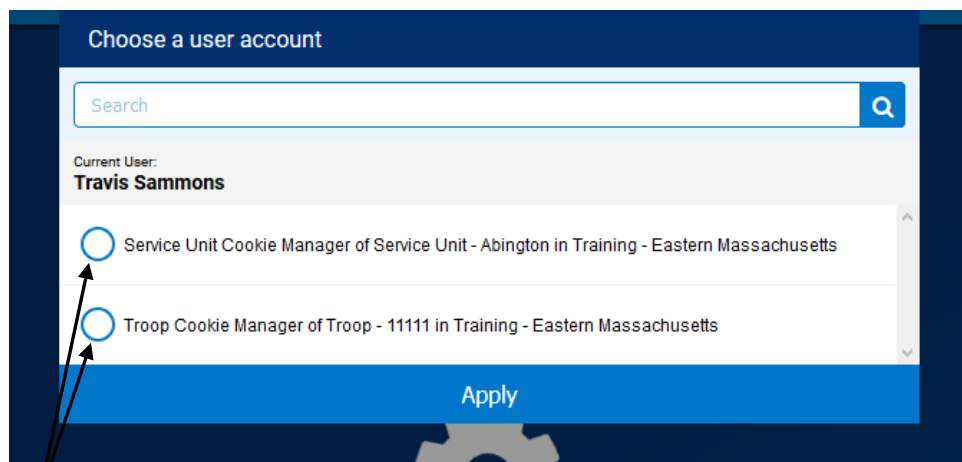
Logging into Smart Cookies

Click the link on the registration page (<https://www.abcsmartcookies.com/>) to go to the homepage 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”.

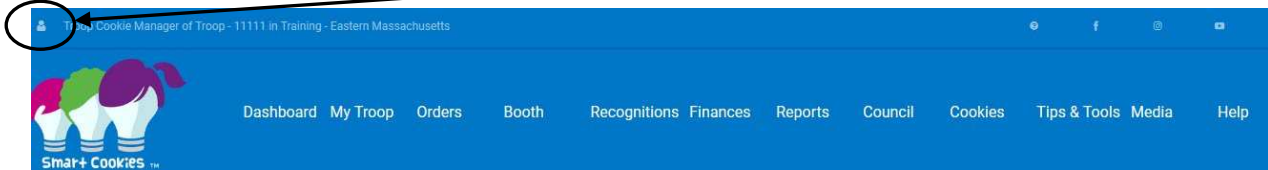
Note: If you only have one role (user for a single Service Unit), you will go directly to the dashboard for your Service Unit. If you have multiple roles (e.g. Service Unit Mentor with troop(s)), a window will appear prompting you to select which role you will login as at this time:



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.

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 Troop or Girl Scout’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 in the top-left of the page and click “Mimic a User”:



Once clicked, it will bring you to a list of Troop users/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 screenshot of a table listing registered users in the Smart Cookies system. The table has columns for Council, Council Assistant, Name, Last Name, Email, and Status. Below the table is a "Mimic a User" button with a person icon. Arrows from the text above point to the table and the button.

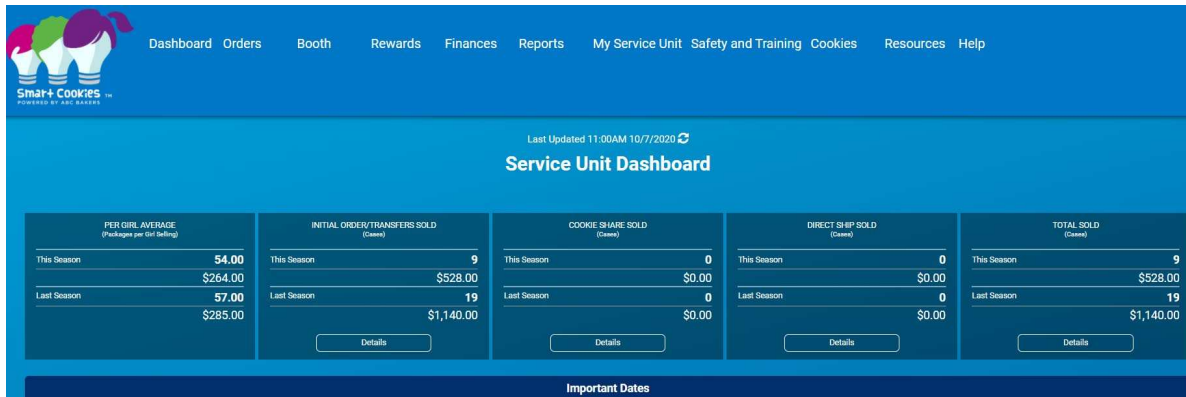
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Pi	Fong	pfong@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Jessica	Randall	jrandall@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Michelle	Ambila	mambila@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Jamie	Chelel	jchelel@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Jennifer	LaBissoniere	jlabissoniere@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Katy	Denault	kdenault@gsema.org	Registered
Council	Council Assistant ...	Girl Scouts of Eastern Massachusetts	Cristina	Thibault	cthibault@gsema.org	Registered

Page 1 of 3 (53 items) 1 2 3

Mimic a User

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.

Service Unit Dashboard



The Service Unit Dashboard details, at a high level, the total activity for all the troops in your Service Unit.

From this page, you can view:

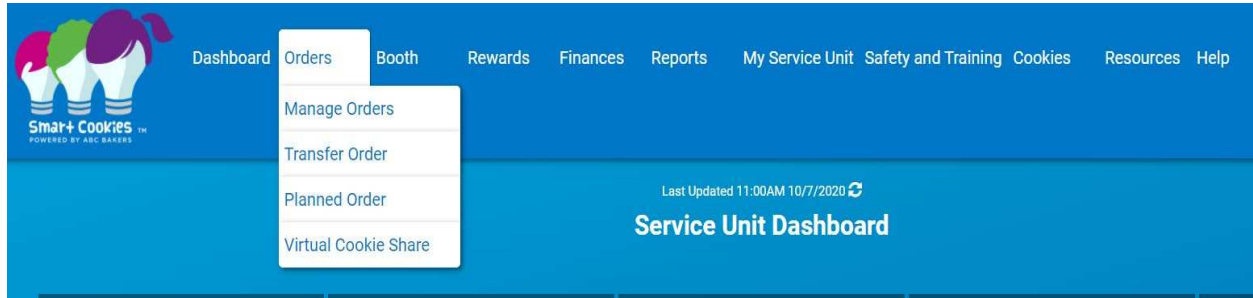
- **Per Girl Average** – in Packages per Girl Selling; this year vs. last year
- **Initial Order/Transfers Sold** – Cases assigned to troops; this year vs. last year
- **Cookie Share (Donations) Sold** – in Cases; this year vs. last year
- **Direct Ship (Online) Sold** – in Cases; this year vs. last year
- **Total Sold** – cases, this year vs. last year
- **Calendar** with important dates and tasks (deadlines) associated with them
- **Messages** – from Council
- **Troops Registered and Selling, 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), and Balance Due (to Council)
- **Inventory & Cookie Share Sales** – total inventory, by cookie variety, ordered by all troops, as well as, how much has been assigned (Inventory Sold) and remaining to be assigned (On Hand)
- **Breakdown, by troop, of total packages ordered, assigned, and remaining, as well as, seeing the inventory breakdown by cookie variety for each troop or Girl Scout (by clicking “Details”):**

Troops	Goals	Ordered	Sold	On Hand	CShare	
11111	1000	237	237	0	0	Details

Adventurefuls 88.6% Ordered: 24 Sold: 210 On Hand: -186 Last Season: 263	Toast-Yay 0.0% Ordered: 7 Sold: 0 On Hand: 7 Last Season: 21	Lemonades 0.0% Ordered: 24 Sold: 0 On Hand: 24 Last Season: 20	Trefoil 3.4% Ordered: 17 Sold: 8 On Hand: 9 Last Season: 28	Thin Mints 4.2% Ordered: 60 Sold: 10 On Hand: 50 Last Season: 4	Peanut Butter Patties 3.8% Ordered: 36 Sold: 9 On Hand: 27 Last Season: 16	Caramel deLites 0.0% Ordered: 45 Sold: 0 On Hand: 45 Last Season: 8
Peanut Butter Sandwich 0.0% Ordered: 12 Sold: 0 On Hand: 12 Last Season: 7	Caramel Chocolate Chip 0.0% Ordered: 12 Sold: 0 On Hand: 12 Last Season: 0					

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
- Orders
 - Manage Orders
 - Transfer Order
 - Planned Order
 - Virtual Cookie Share
- Booth
 - Schedule Booths
 - Troop Reservations
- Rewards
 - Manage Recognition Orders
 - Recognition Order
- Finances
 - Financial Transactions
- Reports
 - Current
 - Archived
- My Service Unit
 - Service Unit Info
 - Troops
 - Girls
 - Emails
 - Messages
- Safety and Training
 - Smart Cookies Training
 - Safety
- Cookies
- Resources
- Help

To go to each section, hover over each heading and click on the desired sub-section. “Dashboard”, “Cookies”, “Resources”, and “Help” are the only headers which also act as their sub-section, so all you will need to do is click them.

Next, we will discuss each section in more detail.

Service Unit Dashboard – see page 6

Orders

Manage Orders

The Manage Orders page collects every single type of order your troops have created throughout the entire length of the Cookie Program, except for Recognition Orders (*see pages 28-31 for details*).

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



- **Planned** – Orders currently in the system that have NOT 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 Service Unit or 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 Service Unit or 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 troops and Girl Scouts, 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:

8 Results

Search By: All | Keyword:

From: To:

Cases Packages Cases/Packages

Action:

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	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	

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 gray scroll bar 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 three stacked boxes to the far-right of the order row:

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	⋮

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 10-13 and more details about Planned Orders can be found on pages 14-16.

Transfer Order

There are four types of transfers a Service Unit user can create:

- **Troop to Troop (T2T)** – giving packages to another troop
- **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) Transfers:

- Select “Troop to Troop” in the “Type of Transfer” box
- Click on the “From” row to select the Service Unit and Troop to transfer from – use the search box if needed; click “Apply”

- Click on the “To” row to select the Service Unit and Troop to transfer to – use the search box if needed; click “Apply”

TYPE OF TRANSFER:
Troop to Troop

From: SERVICE UNIT Abington TROOP 11111
Quantity: 1372 Packages Contact: Travis Sammons | (978) 269-6660 | tsammons@gsema.org

To: SERVICE UNIT Abington TROOP 22222
Quantity: 4 Packages Contact: Erin Sullivan | (781) 373-4237 | esullivan@gsema.org

- Put the number of packages you are transferring between the two troops, 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) and then click “Save” to complete the transfer.

You can then 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.

Troop to Girl (T2G) Transfers:

- Select “Troop to Girl” in the “Type of Transfer” box
- Select the Service Unit and Troop in the “From” row – use the search box if needed – click “Apply”; 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”

TYPE OF TRANSFER:
Troop to Girl

From: SERVICE UNIT Abington TROOP 11111
Quantity: 1491 Packages Contact: Travis Sammons | (978) 269-6660 | tsammons@gsema.org

To: SERVICE UNIT Abington TROOP 11111 GIRL Sample Girl
Quantity: 20 Packages Contact: Travis Sammons | tsammons@gsema.org

- 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, the troop has 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 they are 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 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 Troop and Girl Scout to transfer from (Service Unit is 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 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 Troop and Girl Scout to transfer from (Service Unit is 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 12 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 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.

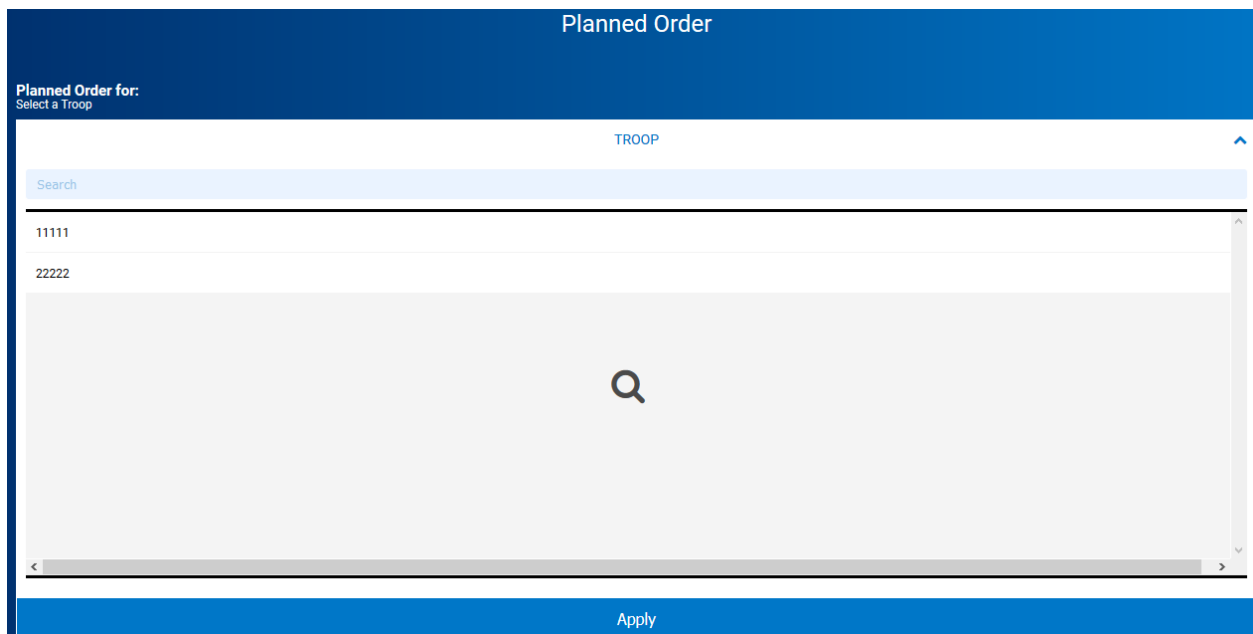
Important! Another transfer type you may see in the system is noted as C2T, or Cupboard to Troop, transfer. This is when a Planned Order has been picked up at the cupboard and the order has been approved by the Cupboard manager. Once this happens, the cases/packages are transferred FROM the cupboard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

- Hover over “Orders” and click “Planned Order”
- Select the troop in the box that appears and click “Apply”:

The screenshot shows a web interface titled "Planned Order". At the top left, it says "Planned Order for: Select a Troop". Below this is a search box labeled "TROOP" with a search icon. The search results show two entries: "11111" and "22222". Below the search results is a large grey area with a magnifying glass icon, indicating a search function. At the bottom of the interface is an "Apply" button.

- 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:

TROOP 11111

Name: Travis Sammons Phone: 9782696660 Email: tsammons@gsema.org






Pick up from:

CUPBOARD	DATE	TIME
Test Cupboard 0  265 Beaver Street Waltham, MA, 02452 <input style="width: 100px; margin-top: 10px;" type="button" value="Edit"/>	Tuesday, May <div style="font-size: 48px; font-weight: bold; color: white; margin: 20px 0;">29</div> <input style="width: 100px; margin-top: 10px;" type="button" value="Edit"/>	1 Hour <div style="font-size: 24px; font-weight: bold; color: white; margin: 20px 0;">12:00 PM</div> TO <div style="font-size: 24px; font-weight: bold; color: white; margin: 20px 0;">01:00 PM</div> <input style="width: 100px; margin-top: 10px;" type="button" value="Edit"/>

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 12 packages in each case, for EVERY variety. 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:

<input style="border: none; background: none; cursor: pointer;" type="button" value="Clear Quantities"/>			CASES
	Adventurefuls	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Toast-Yay	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Lemonades	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Trefoil	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Thin Mints	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Peanut Butter Patties	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Caramel deLites	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Peanut Butter Sandwich	\$0.00	<input style="width: 40px;" type="text" value="0"/>
	Caramel Chocolate Chip	\$0.00	<input style="width: 40px;" type="text" value="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

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

At this point, you can 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 8-10 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)

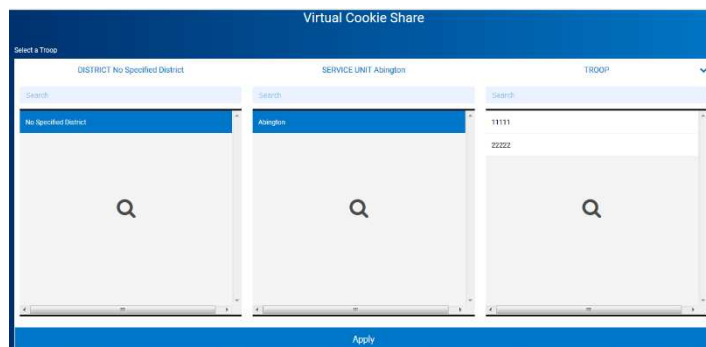
Virtual Cookie Share orders are those that are designated as donation cookies and are ADDED to a troop’s inventory. For example, if a customer wants to donate packages that a troop does not currently have, you can create this order to add-on packages for donation. The troop is financially responsible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

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

To create a Virtual Cookie Share order:

- Select the troop in your Service Unit and click “Apply”:



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

Virtual Cookie Share
Cookies for a Cause

DISTRICT No Specified District SERVICE UNIT Abington TROOP 11111

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

Name	Total
Test Girl	2
Sample Girl	5
Total	7

Order notes
Type here (250 Characters max)

[Save](#)

- Add Order notes (optional) that you may find helpful
- Click “Save”

The order has been successfully entered and you can navigate away from the page at this time.

Order Refunding

If a Girl-Delivery order needs to be refunded, there is a function for troop-level (and above, e.g. Service Unit) 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:

Customer	Order Date	Source	Type	Status	Amount	Paid	Payment Method	Actions
Cindy Schafer	August 10, 2020	Social	Girl Delivery	Ordered	\$8.00	Yes	Credit Card	<div style="display: flex; gap: 5px;"> Update My Contact Refund Order </div>
Cindy Schafer	August 10, 2020	Social	Girl Delivery	Delivered	\$12.00	Yes	Credit Card	✎
Cindy Schafer	August 10, 2020	Social	Girl Delivery	Cancelled	\$12.00	No	Credit Card	⋮
Cindy Schafer	August 10, 2020	e-card	Girl Delivery	Ordered	\$4.00	No	-	✎

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

Order Details	
First Name	Cindy
Last Name	Schafer
Email Address	ncschafers@gmail.com
Order Number:	550209
Date Ordered:	August 10, 2020
Type:	Girl Delivery
Payment Method:	Credit Card
Status:	Ordered
Transaction Number:	1331615617
Paid:	Yes
Amount:	\$8

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: Walmart, certain Malls, and various business partnerships) – the list of these sites will be in the system .
- **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

Note: Service Unit users are not able to put in Troop Secured booths through Smart Cookies, it is only a Troop function.

COBS Lottery Process

To add a troop to the COBS lottery:

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

Schedule Booths Booth Locations

Open: Lottery

Opens On: **Jun 05 @ 08:00 AM** Closes On: **Jun 30 @ 08:00 AM**

Max Requests: **100** Max Premium Wins: **N/A** Max Total Wins: **3**

Select a Troop

DISTRICT	SERVICE UNIT	TROOP
No Specified District	Abington	11111 22222

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 troops can have and the maximum number of slots troops may receive. Council does not designate any slot as premium; all slots are treated equally.

- Select a troop to make request for and click “Apply”
- Scroll down below the troop information and you will see a list of COBS sites to the left and a Google map (on the right) showing you the location of each site:

The screenshot shows a web interface for scheduling booths. At the top, there are filters for DATE, TIME, ZIPCODE, TYPE, and PREMIUM. Below the filters is a legend with three categories: Lottery (purple dot), FCFS (green dot), and Premium (grey dot). The main content area is split into two columns. The left column contains a list of COBS sites, including 'Test Store' (143 Abbot Street, Andover, MA, 01810) and 'Girl Scout Super Store' (265 Beaver Street, Waltham, MA, 02452). The right column shows a Google map of the area around Foster, MA, with a purple pin indicating the location of a site. The map also shows other locations like Indian Ridge Reservation, Phillips Academy, and Ward Reservation.

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 23-25.

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

Select the dates and times for Lottery

December 0 Times Selected

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

January 0 Times Selected

S	M	T	W	T	F	S
		1	2	3	4	5

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

Select the dates and times for Lottery

December 0 Times Selected

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

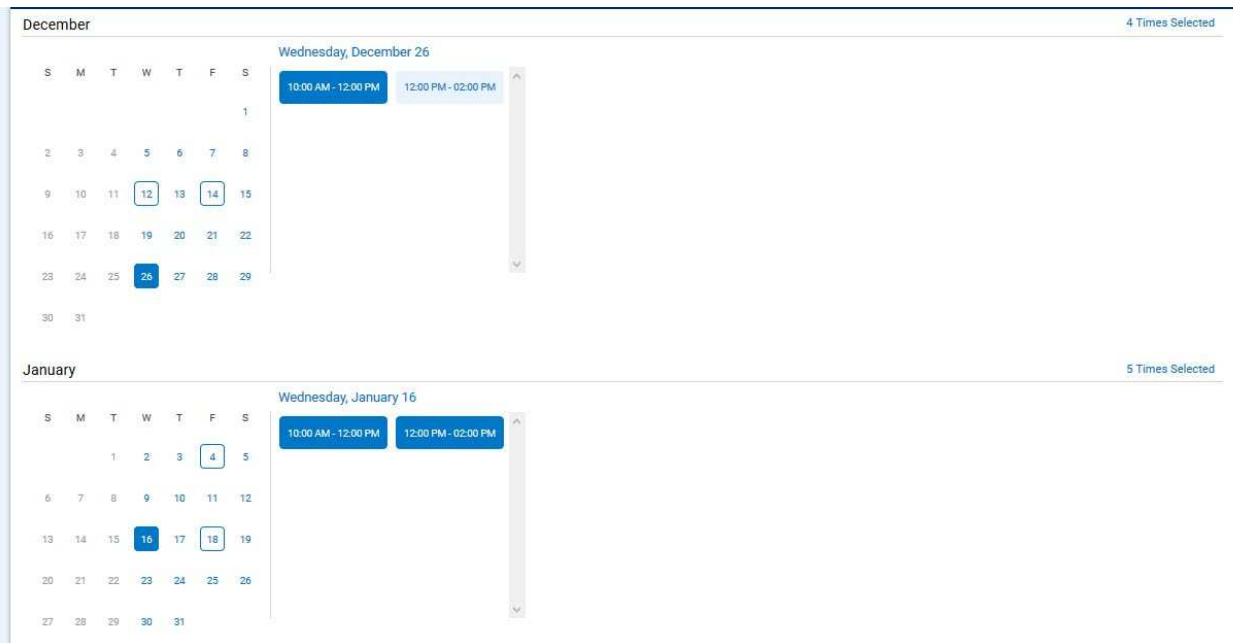
Wednesday, December 12

10:00 AM - 12:00 PM 12:00 PM - 02:00 PM

January 0 Times Selected

S	M	T	W	T	F	S
		1	2	3	4	5

- 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” -> “Troop Reservations”
- Select a troop to view and click “Apply”; the following window will appear:

Troop Booth Reservations			
Lottery	First Come, First Served (FCFS)	Troop Secured	Council Reservations
Premium Wins 0 Premium Wins Max 0	Premium Reservations 0 Premium Reservations Max 0	Approved 0	Premium 0
Total Wins 0 Total Wins Max 3	Total Reservations 0 Total Reservations Max 0	Denied 0	Total 0
Requests 26 Requests Max 100		Pending 0	
<input checked="" type="checkbox"/> Show Results	<input checked="" type="checkbox"/> Show Results	<input checked="" type="checkbox"/> Show Results	<input checked="" type="checkbox"/> 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 23-25*

- **Troop Secured** – town-specific booth sales added and whether or not they been approved, denied, or pending
- **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 gray scroll bar; 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	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 26	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 04	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 18	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 18	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 16	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 16	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0

Note: In this example, you can see the type of request is “Lottery” and the status is “Requested”, this means the troop is currently entered into the lottery for these locations, dates, and times. You can also click on the three stacked boxes to the far-

right to see more Booth Details, use the Smart Booth Divider (more information on pages 26-28), or Remove Reservation (Request):

ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
01810	Dec 12	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Dec 26	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 04	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 18	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 18	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 16	10:00 AM - 12:00 PM	<input type="checkbox"/>	LOTTERY	REQUESTED	0	0
01810	Jan 16	12:00 PM - 02:00 PM	<input type="checkbox"/>	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 they have won any of the requested slots.

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

3 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	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0

Important! If for any reason a troop cannot make a booth sale and they click to “Remove Reservation”, they 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:

Schedule Booths
Booth Locations

Open: First Come, First Served - Reservation 1

Opens On: May 24 @ 09:00 AM	Closes On: Jun 30 @ 12:00 PM
Max Premium Reservations N/A	Max Total Reservations 2

- Select the troop for which to request and click “Apply”
- 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:

1. Select an available time for FCFS

December			January		February	
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Save

- Click on a date highlighted in blue, which shows availability and times will appear below:

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

To view the additional FCFS booth sales:

- Click on “Booths” -> “Troop Reservations”
- Select the troop to view booth sales for and click “Apply”
- Scroll down to the booth sale table and you will see all of the current sales, designated as either lottery win or FCFS:

5 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	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	<input type="checkbox"/>	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	<input type="checkbox"/>	FCFS		0	0

Using the Booth Sale Divider

- Click on “Booth” -> “My Reservations”
- Select the troop to view booth sales for and click “Apply”
- 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 ones associated with the appropriate 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	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	<input type="checkbox"/>	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	<input type="checkbox"/>	FCFS		0	0
01810	May 25	10:00 AM - 11:00 AM	<input type="checkbox"/>	TROOP_SECURED	APPR		

Booth Actions: Booth Details | Smart Booth Divider | Remove Reservation

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

Booth Divider

Booth Summary (Packages)

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

Total Left to Distribute: 0
 Total Distributed: 0
 Total Sold: \$0.00

You MUST distribute all the packages sold to the girls in your troop.

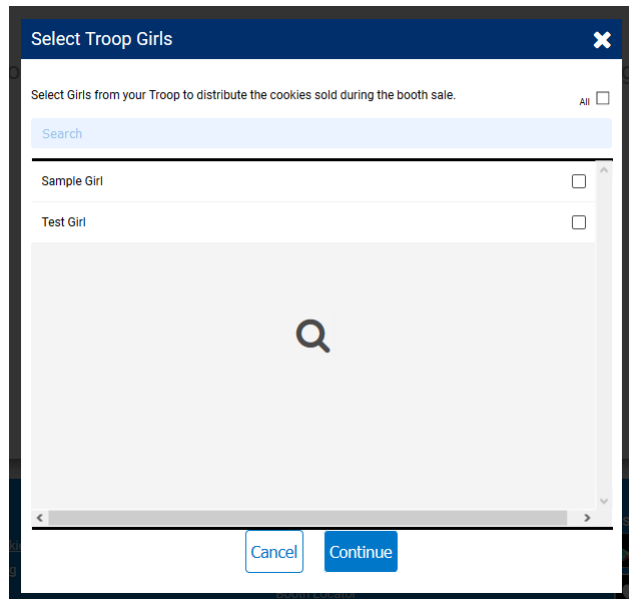
Clear All

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
0	0	0	0	0	0	0	0	0	0

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

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

- 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: **4**

Total Distributed: **38**

Total Sold: **42**
\$210.00

You MUST distribute all the packages sold to the girls in your troop.

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

Buttons: Cancel Distribution, Edit Booth Sales

2 Girls

GIRL NAME	CShare	ADV	TY	LEM	TRE	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

Rewards

Recognition Orders need to be created so the Girl Scouts receive all of their earned recognitions based on what they sold. *Refer to pages 11-12 for the “Troop to Girl (T2G)” transfer process as the primary way for girls to receive credit for selling.*

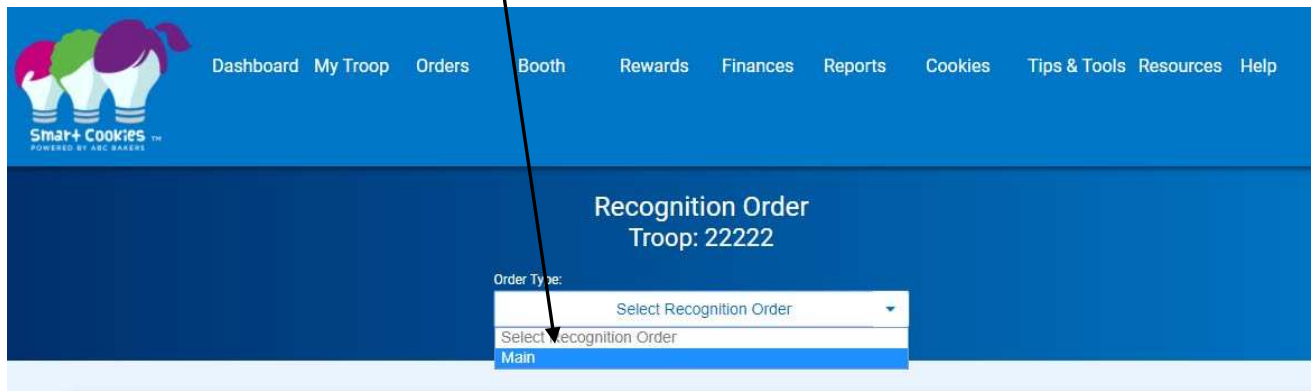
Note: The system automatically calculates MOST of the recognitions in the incentive program. Council has special recognitions that cannot always be calculated within the system (e.g. Crossover Patch).

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.

- Select a troop in the box at the top labeled “For:” and click “Apply”

- The troop number will be displayed at the top of this page; you will 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 them:

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

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

Items	Extras
1 - 24 Packages sold	
25 - 100 Packages sold	
101 - 500 Packages sold	

Save

- The ‘!’ icon will appear again to let you know which level(s) need 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

Stylus Pen

OR

Group 2

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 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 going forward.

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

<input type="checkbox"/>	District ▼	SU ▼	Troop ▼	Type ▼	Date ▼	Number ▼	Cost ▼	Status ▼	
<input type="checkbox"/>	No Specified District	Abington	11111	Main	October 5, 2021	0000002	\$25.75	COMPLETE	  
							Total Cost:	\$25.75	

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 step needs to be taken before the order can be completed, such as a recognition choice or t-shirt/hoodie size needs to be selected
 - **COMPLETE** – means all action steps 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 off to vendor for fulfillment – **after this time, no changes can be made**

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:

Manage Financial Transactions

Troop Transactions Girl Transactions

Drag a column header here to group by that column

Transaction # ▼	District ▼	Service Unit ▼	Troop ▼	Bank ▼	Date ▼	Type ▼	Amount ▼	Ref # ▼	
0000002	No Specified District	Abington	11111	Test Bank	10/26/2017	ACH Deposit	\$1,000.00	ACH	
							Sum: \$1,000		

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

Manage Financial Transactions

Troop Transactions Girl Transactions

Drag a column header here to group by that column

Transaction # ▼	District ▼	Service Unit ▼	Troop ▼	Bank ▼	Date ▼	Type ▼	Amount ▼	Ref # ▼	
0000002	No Specified District	Abington	11111	Test Bank	10/26/2017	ACH Deposit	\$1,000.00	ACH	
							Sum: \$1,000		

To review all troop balances, please refer to the following report: [Troop Balance Summary Report](#)

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

See Girl Transactions table below:

Manage Financial Transactions

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, troops only have to record Girl Scout payments if they choose to do so through the system. These payments have no effect on the overall troop balance, but they do affect the individual Girl Scout balances, which can be seen in the “Girl Balance Summary Report” (quick link below table).

Reports

Current

Selecting a report:

- Click the report category in the “Report Categories” box
- Select the report in the “Reports” box

Report Categories

- Booths
- Finance
- Orders
- Entity
- Rewards
- Inventory & Delivery

Reports

- Financial Transaction Summary
- Girl Balance Summary
- Girl Deposit Summary
- Total Troop Sales & Finances By Service Unit - View 1
- Total Troop Sales & Finances By Service Unit - View 2
- Total Troop Sales & Finances By Service Unit - View 3
- Total Troop Sales & Finances By Troop - View 1
- Total Troop Sales & Finances By Troop - View 2
- Total Troop Sales & Finances By Troop - View 3
- Total Troop Sales and Finances - Condensed View
- Troop Balance Summary

[Preview It](#)

[Report Info](#)

[Add to Favorites](#)

[Go To Report](#)

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.

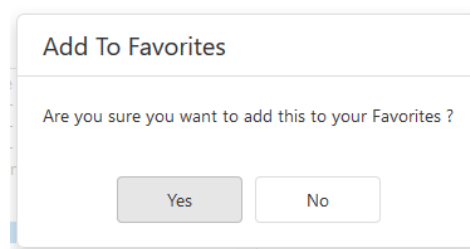
- Click “View Report” to see the report, “Go to Report Listings” to go back to previous page, or “Reset” to set the filters to their default values

List of Helpful Reports:

- Summary Reports
 - **Financial Transaction Summary** – lists all financial transactions associated with your troops
 - **Girl Cookie Totals Summary** – shows all packages currently assigned to every Girl Scout, in each troop, in a summarized chart
 - **Mobile and Ecard Summary** – shows all online activity associated with your troops (e-cards sent to potential customers, packages purchased online by variety, etc.)
 - **Recognition Order Summary By Troop** – list all total recognitions earned by each of the troops in a summarized report
 - **Recognition Order Summary By Girl** – list all recognitions earned by the Girl Scouts, for each troop, in a summarized report; matches the Recognition Order entered into 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)
 - **Booth Sale Credit Card Transactions Export** – lists all of the transactions associated with virtual booth sales for compiling into Planned Order 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):

Archive Reports

Select Season

- 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 customer@gswny.org and they will make sure it gets to the appropriate person for follow-up.

My Service Unit

Service Unit Info

This page shows you the contact information Council has for the Service Unit. If any information needs to be edited, please do so:

Service Unit Information

SU Name	Proceed Plan	
Abington	No Plan Selected	
FirstName*	Last Name*	Email*
Travis	Sammons	tsammons@gsema.org
Address 1	Address 2	
143 Abbot Street		
City	State	Zip
Andover	MASSACHUSETTS	01810
Phone	Fax	Mobile
(978) 269-6660	() - -	() - -
Troops Assigned		
11111 22222		





Update Information

Troops

Page showing all the troops in your Service Unit. You can double-click on the row of a troop, or click the pencil icon on the far-right, to view/edit troop information. You can also click on the small Girl Scout icon to the far-right, directly to the right of the pencil icon, to view the Girl Scouts in the troop:

Manage Troops

Drag a column header here to group by that column



Active	District	Service Unit	Troop	First Name	Last Name	Email	
<input checked="" type="checkbox"/>		Abington	11111	Travis	Sammons	tsammons@gsema.org	 
<input checked="" type="checkbox"/>		Abington	22222	Erin	Sullivan	esullivan@gsema.org	 

Girls

This page gives you a complete list of all the Girl Scouts in your Service Unit. You can use the search boxes to view certain information or click on the column headers to sort the information:

Manage Troop Girls

Drag a column header here to group by that column



District	Service Unit	Tr...	First Name	Last Name	GSUSAID	Grade	Parent	Email
Q	Q	Q	Q	Q	Q	Q	Q	Q
	Abington	11111	Test	Girl		Five	Travis Sammons	tsammons@gsema.org 
	Abington	11111	Sample	Girl		Five	Travis Sammons	tsammons@gsema.org 
	Abington	22222	lilly	cookie				
	Abington	22222	rose	cookie			Travis Sammons	tsammons426@gmail.com  
	Abington	22222	Membership	Test			Parent Membership	klelacheur@gsema.org  





Emails

Page showing all the emails sent to troops, or created by you at the Service Unit level:

Manage Emails

Drag a column header here to group by that column

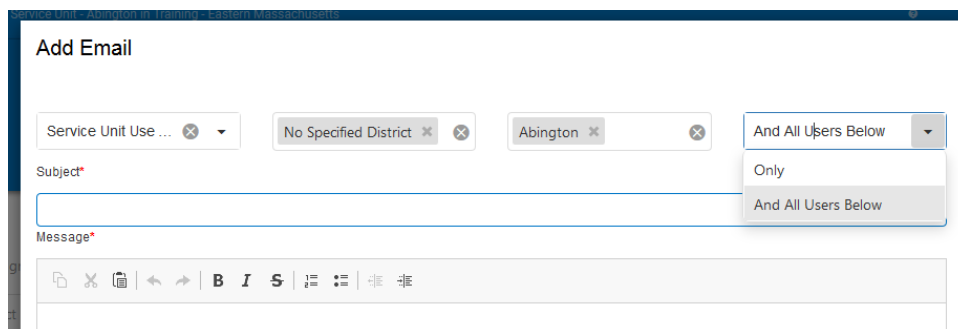



BulkmailID	Subject	Sent Date
Q	Q	Q
254615	Booth Sale Confirmation	5/31/2018 11:00:07... 
254614	Booth Sale Confirmation	5/31/2018 11:00:07... 
254613	Booth Sale Confirmation	5/31/2018 11:00:07... 
254612	Booth Sale Confirmation	5/31/2018 11:00:07... 
254611	Booth Sale Confirmation	5/31/2018 11:00:07... 

 Add New Email

To add a new email:

- Click “Add New Email”
- In the “Select Group to Email” drop-down, click on the role you would like to email:
 - For Service Unit users, select the District, Service Unit, and whether or not you are only sending to other Service Unit users in the same town, or if you are sending to all users below as well, which means Troop and Caregiver/Girl Scout users included:



- For Troop users, select the District, Service Unit, and whether or not you are sending to particular troops or all of them:

- Enter the “Subject” and “Message”
- Click “Save” to keep the email and send later, click “Send” to send now, or “Cancel” to close this window and return to the email table

Messages

Page showing all of the messages created by you at the Service Unit level. Girl Scouts and Troops will see any messages created, on their dashboard, once they log into their Smart Cookies site:

Manage Messages

Drag a column header here to group by that column

Active	Priority	Subject	Roles	Auto Remov...	Sender	Date Sent	
<input checked="" type="checkbox"/>	Medium	Test	Troop, Girl	6/30/2018	Travis Sammons	6/5/2018	

To add a new message:

- Click “Add New Message”
- Enter the “Subject”, “Message”, the “Role” (Troop or Girl, ignore Cupboard), “Priority” (High, Medium, or Low) – “Auto Remove Date” (message will be removed automatically on designated date without further action) and “Send Message” are optional, but the selected role users will not see the message until you click “Yes”:

Appendix A: Virtual Booth/Girl-Delivery Process (Troop-level only)

Troop Information

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

Troop Information

Girls Active*	Girls Selling*	Expected Number of Girls Selling (0-999)	
4	4		
Troop Number	Level	Service Unit	
12345	Junior	Abington	
Proceed Plan*		Proceed Plan Notes	No Notes Available
Test Plan			
Main Recognition Plan			
Test Plan			
Troop Recognition Plan			
No Recognition Plan			
Submitted documentation, if required?	Warning for funds owing?		
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Bank Account	Bank Routing		
Primary Contact			
Email	First Name	Last Name	
tsammons@gsema.org	Travis	Sammons	
Street	Suite		

Note: All of the information on this page is pre-loaded from our membership database, if any changes need to be made, [please email us](#).

Troop Ship Only Link (formally Troop Direct Ship Orders Link)

Near the bottom of the Troop Information page, you will see a section that includes the 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):

Troop Ship Only Link (Use for contacting customers outside of troop delivery radius)

Share this link via social media, email or text to invite customers to place an order via Direct Ship.

<https://app.abcsmartcookies.com/#/shopify-landing-troop/5d62d197-f2fe-43f4-a3ad-5b6c7cfb3422>

Copy Link

Print handout

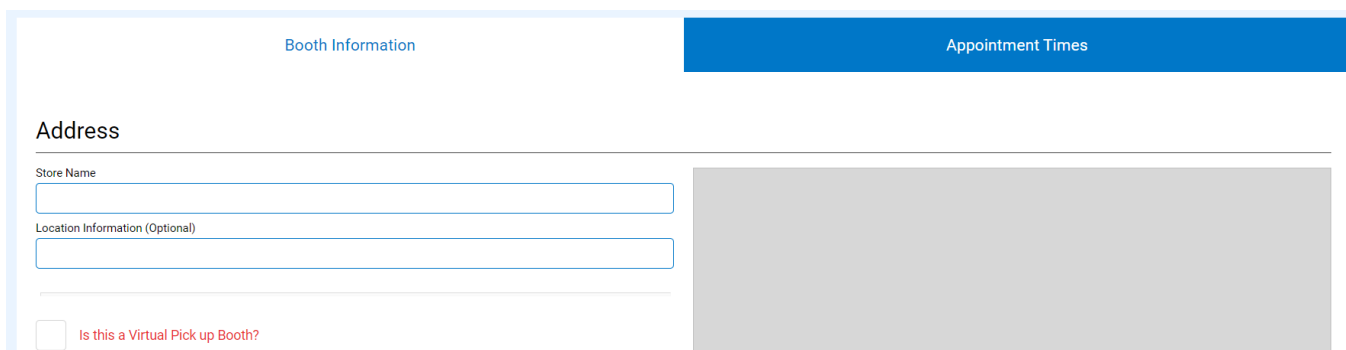
There is also an option for printing a handout which includes the Troop’s unique QR Code and tiny URL that customers can scan, or type, to locate the Troop’s ship only shop as well. These links/codes can be provided during live events or in pre-recorded videos showing off the troop and what goals they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

Once orders are completed in the online shop, the 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 the Girl Scouts by using the Smart Booth Divider feature in the system. There will be a line item on the Troop Reservations page where you can see this Direct Ship “booth” and the total sales for it.

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

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



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 Virtual Pick-up Booth 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. 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 that fact.

- The first step is to enter the required information for the booth:
 - Store Name
 - Booth Location Address (valid addresses will appear in the Google map window to the right once the location is saved)
 - City
 - State
 - Zip Code
 - 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 towns.

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:

Booth Information

Appointment Times

test2
111 East Grove Street
Middleboro, MA 02346

Please add appointment times for your booth.

[Add Appointment Time](#)

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

Request Appointment Time
✕

1. Pick a Date

May 2018

S	M	T	W	T	F	S	
			1	2	3	4	5
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31			

2. Pick your appointment time

Start time

AM PM

End time

AM PM

Save

- 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.

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	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	<input type="checkbox"/>	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	<input type="checkbox"/>	FCFS		0	0
01810	May 25	10:00 AM - 11:00 AM	<input type="checkbox"/>	TROOP_SECURED	PENDING	0	0

Note: There are three statuses for Troop Secured Booth Sales – “Approved”, “Denied”, or “Pending”. Council checks multiple times per business day 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	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 12	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 14	12:00 PM - 02:00 PM	<input type="checkbox"/>	LOTTERY	WIN	0	0
01810	Dec 05	12:00 PM - 02:00 PM	<input type="checkbox"/>	FCFS		0	0
02452	Dec 20	01:30 PM - 04:00 PM	<input type="checkbox"/>	FCFS		0	0
01810	May 25	10:00 AM - 11:00 AM	<input type="checkbox"/>	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	<input type="checkbox"/>	TROOP_SECURED	PENDING
265 Beaver St	Waltham	02452	Friday, Nov 27	01:00 PM - 04:00 PM	<input type="checkbox"/>	VIRTUAL_PICK_UP	
143 Abbot Street	Andover	01810	Monday, Nov 30	01:00 PM - 04:00 PM	<input type="checkbox"/>	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 was 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/afdf2f4a8-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, 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 Booths

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

Transaction #	Type	Customer Email	Packages #	Amount	Location	Reservation Date	Status	Created By	Actions
	Pick Up	ncschafers@gmail.com	3	\$15.00	Hamptons - Virtual pickup test	Nov 28, 2020 @ 09:00 to 11:00AM	Pending	Cindy Schafer	
	Pick Up	ncschafers@gmail.com	1	\$5.00	Hamptons - Virtual pickup test	Nov 20, 2020 @ 04:00 to 05:30PM	Cancelled	c s	

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:

Selected Pick up : Hamptons - Virtual pickup test, 1650 north downs lane, Huntersville, NC, 28078 on Nov 28, 2020 @ 09:00 to 11:00AM

Customer Details

First Name: Cindy
 Last Name: Schafer
 Email Address: ncschafers@gmail.com
 Mobile Number: (555) 444-6666
 Can text customer?: No

Virtual Booth Sales Details

Sale Number: 238537
 Date sold: Nov 18, 2020
 Sale status: Pending
 Selected for Donation if Undeliverable?: No
 Paid: No

Cookie Packages

Lemonades	1
Trefol	1
Thin Mints	1
Total	\$15.00

Buttons: Cancel Sale, Approve Sale

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 or Troop to Girl (T2G) Transfers.