



Quick Bites

Smart Cookies Service Unit Checklist

Setup & Access

- ☐ Complete Smart Cookies registration from emailed link
- ☐ Verify pre-populated contact information
- ☐ Create and test password
- ☐ Log in successfully
- ☐ Confirm correct Service Unit role is selected
- ☐ Update profile information if needed
- ☐ Learn how to switch roles and mimic troop users for support purposes

Dashboard Monitoring

- ☐ Review dashboard KPIs regularly
- ☐ Monitor:
 - Troops with No Initial Order
 - Troops with No Early Recognition Orders
 - Troops with No Main Recognition Orders
 - Incomplete Recognition Orders
 - Troops with Undistributed Ship Orders
- ☐ Check calendar and upcoming tasks
- ☐ Review financial summary
- ☐ Review inventory and cookie share sales by troop

Orders Management

Initial Orders

- ☐ Monitor troop initial order submissions
- ☐ Assist troops with entering orders when needed
- ☐ Verify delivery station is selected
- ☐ Submit all troop initial orders by Service Unit deadline (if assigned by council)
- ☐ Resolve any order submission errors

Other Order Support

- ☐ Support troops with:
 - Planned Orders
 - Transfer Orders
 - Virtual Cookie Share Orders
- ☐ Use Manage Orders to review troop activity
- ☐ Filter and review:
 - Initial Orders
 - Planned Orders
 - Transfers
 - Cookie Share Orders
 - Direct Ship Orders

Booth Management

Booth Creation

- ☐ Upload booth locations (if applicable)
- ☐ Create booth locations manually as needed
- ☐ Verify booth address accuracy
- ☐ Add booth notes and files if needed
- ☐ Create appointment times and schedules

Booth Scheduling

- ☐ Assist troops with booth requests
- ☐ Manage lottery requests (if permitted)
- ☐ Manage first-come-first-served selections
- ☐ Cancel or modify troop booth assignments when necessary
- ☐ Support troops with Smart Booth Divider

Rewards & Recognition Orders

Review Orders

- ☐ Monitor troops for missing recognition orders
- ☐ Review all incomplete recognition orders
- ☐ Resolve missing selections and apparel sizes
- ☐ Confirm all recognition orders show "Complete" status

Submit Orders

- ☐ Filter recognition orders by type:
 - Early
 - Main
 - Troop
- ☐ Unsubmit all orders before final review
- ☐ Verify all corrections are complete
- ☐ Submit all recognition orders
- ☐ Confirm orders display status "S" (Submitted by Service Unit)

Financial Review

- ☐ Review troop financial transactions
- ☐ Review girl financial transactions
- ☐ Verify Digital Cookie imports
- ☐ Enter or edit girl transactions when needed
- ☐ Export financial reports as needed

Reports

- ☐ Review current season reports regularly
- ☐ Run troop and Service Unit performance reports
- ☐ Export reports to PDF or Excel
- ☐ Set frequently used reports as Favorites
- ☐ Review archived reports from previous seasons for comparison

Service Unit Maintenance

- ☐ Review Service Unit contact information
- ☐ Update alternate reward shipment contact if needed
- ☐ Review troop roster
- ☐ Review girl roster
- ☐ Report incorrect locked information to council

Communication

Email

- ☐ Send updates to troops as needed
- ☐ Save draft emails when necessary
- ☐ Track sent emails in Manage Email grid

Internal Messages

- ☐ Create dashboard messages for troops
- ☐ Set priority level
- ☐ Set auto-remove date if desired
- ☐ Send or save draft messages

Training & Support

- ☐ Review Smart Cookies training materials
- ☐ Review GSUSA safety resources
- ☐ Access Help Desk when Smart Cookies assistance is needed
- ☐ Contact council for council-specific or Digital Cookie questions

End-of-Season Verification

- ☐ All troop initial orders submitted
- ☐ All booth assignments completed
- ☐ All recognition orders submitted
- ☐ Financials reviewed
- ☐ Required reports exported/saved
- ☐ Troop and girl records reviewed
- ☐ Final communications sent to troops