



# Service Unit User Guide

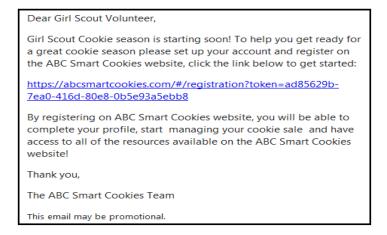
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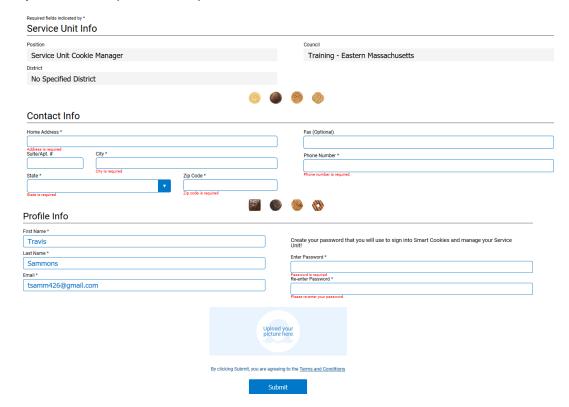
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# **Registering for Smart Cookies**

Your council will upload your information in Smart Cookies and you will receive an email from noreply@abcsmartcookies.com.



- Click the unique link in the email to complete registration
- Some information may be pre-populated check for accuracy and contact your council if there are errors
- Once you have completed all required fields, click submit.



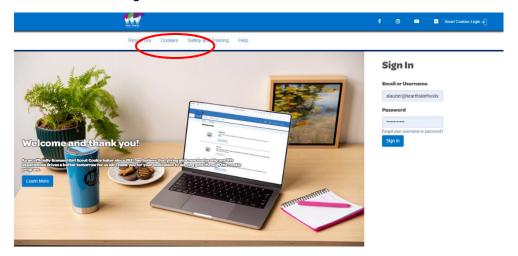
After you click "Submit", a confirmation page will appear:

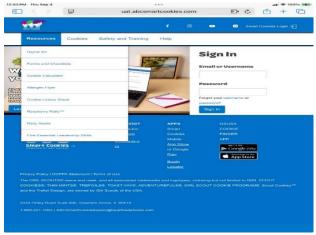
# You've successfully registered!

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

## Log In

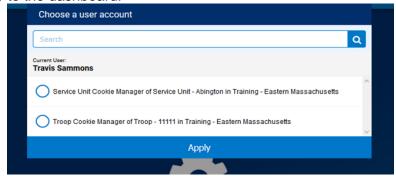
All users access Smart Cookies via <a href="www.abcsmartcookies.com">www.abcsmartcookies.com</a>. Resources, Cookie Information, Safety and Training and Help are accessible prior to log in. In order to be sure that Resources and Cookie Information is readily available and to assist with any needed updates during each season, this information will only be available on the log in screen.





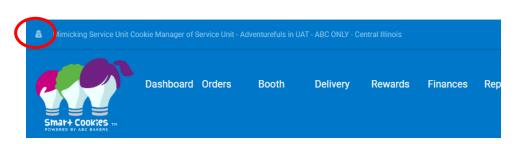
Clicking on Resources will open up a menu of all available items. Clicking on Cookies will open the information on the current cookie line up. Users will be able to access nutritional information as well as allergen information.

- Login with your email and password you created at registration
  - If you forget your password, you can click the Forgot Password Link
  - Users with multiple roles will need to choose your role. Users with one account will go directly to the dashboard.



#### **Switching Roles**

Click on the small person icon in the upper left corner to switch accounts without logging out. Select the new role as desired.





#### Mimic a User

- Select Mimic a User to mimic an available troop user.
- A list of users will appear.
- Highlight user row and click Mimic a User button
- Confirmation message will appear. Confirm and you will be shown user dashboard
- To return to your screen, return to top left corner and click End Mimicking Session

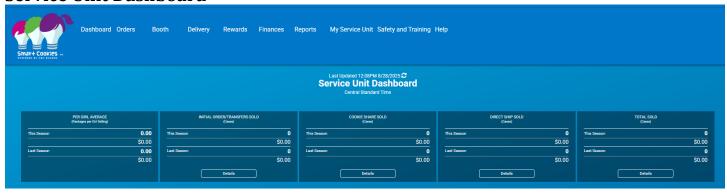


#### Edit Profile

You can edit your profile including updating personal information, add a profile picture or change a password.



#### Service Unit Dashboard



The Service Unit Dashboard details, at a high level, the total activity for all troops in your Service Unit and comparisons to prior year statistics. Dashboards do not automatically update each time activity is registered within the Service Unit but do update on a schedule. The last update is displayed above the title and a user can force an update by clicking the arrows next to the update information.

There are Key Performance Indicators in the top 5 boxes. You can click Details in boxes to expand the information

- Per Girl Average in Packages per Girl Selling
- Initial Order/Transfers Sold Cases assigned to troops
- Cookie Share (Donations) Sold Cases
- Direct Ship Sold –Cases (reflects girl and troop sales)
- Total Sold Cases that have been assigned to Girl Scouts by the troops.



The next section contains key information on the sale including:

- Action Items quick links to a list of troops in a Service Unit that need action
  - Troops with No Initial Order
  - Troops with No Early Recognition Orders
  - Troops with No Main Recognition Orders
  - o Incomplete Recognition Orders
  - Troops with Undistributed Troop Ship Orders
- Calendar dates highlighted in green have a task assigned
- Tasks a listing of key dates as entered by your council



#### **Stats & Financial Summary**

- Girls Registered and Selling current year and last season
- Financial Summary Total Sales, Troop Proceeds, Council Proceeds (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)

#### **Inventory and Cookie Share Sales**

A summary of the SU totals is shown as well as a listing of summary information for each troop. Drill down (click details) to view each troop's data including total packages ordered, sold (assigned to girls), and on hand. Data on percentage mix is available as well last season's total sold.



**Navigating through Smart Cookies** 



Tabs are available for navigating to each functional area of Smart Cookies. Each tab will contain actions available to the user based on the council set up and permissions.

- Dashboard
- Orders
  - Manage Orders
  - Troop Initial Order
  - Transfer Order
  - Planned Order
  - Virtual Cookie Share

- Booth
  - Manage Booths (by permission)
  - Schedule Booths
  - Troop Reservations
- Delivery
  - Manage Delivery Station (by permission)
- Rewards
  - o Manage Recognition Orders
  - o Recognition Order
- Finances
  - Financial Transactions
- Reports
  - Current
  - o Archived
- My Service Unit
  - Service Unit Info
  - o Troops
  - o Girls
  - User Management (by permission)
  - o Emails
  - Messages
- Safety and Training
  - Smart Cookies Training
  - Safety
- Help

#### Orders

#### Manage Orders

The Manage Orders will allow user to view all cookie orders from all channels by choosing appropriate filters. The top section of the page details total amounts of cases by order status.



- Planned Troop Planned Orders not approved by a cupboard manager
- Ordered Total amount of cases troops in the SU are responsible for includes ship only
- Sold Cases assigned to Girl Scouts within the troops.
- On Hand Total amount of cases in troop inventories not yet assigned to a Girl Scout.
   On hand should equal ordered minus sold however rounding to cases can cause slight variation.

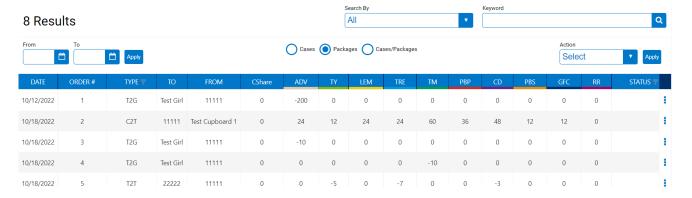


#### Available filters include:

- All selects all filters to display all orders for troops in a Service Unit
- Initial Order shows all troop initial orders.
- Planned shows open planned orders not approved
- Restock will not display orders at SU Level
- Transfer displays transfer orders
  - Must choose type of transfers
  - To display Troop to Girl, Girl to Troop or Girl to Girl transfers the search must be refined to select the Girl Scout within the troop.
- Damaged depending on council settings, damage orders may not display
- Cookie Share shows all virtual cookie share orders
- Direct Ship shows all orders processed through Ship only on Digital Cookie
- CS Donation Council level function only

Click on a desired filter and click Apply Search Parameters to display results. To view specific orders, use the Refine Search feature to select troop(s).

The Manage Order table appears as follows:



- Results are searchable via keyword, order number or date range (From/To).
- Orders can be viewed in Cases, Packages, or Cases/Packages.

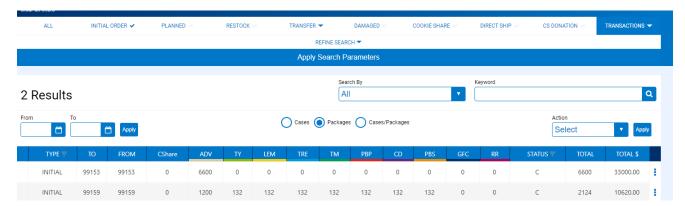


- Based on council permissions, SU level users may be able to edit a troop initial order prior to the SU order deadline.
- Click on the ellipsis at the end of the row to edit order

#### **Submitting Troop Initial Orders**

SU level users may be instructed by the council to submit troop initial orders by the SU order deadline. Once the orders are submitted by the SU, only District or Council level users can edit the troop initial order.

- Navigate to Orders>Manage Orders
- Filter for Initial Orders
- Under Action select submit all
- User will receive an email when all orders processed
- If an order does not submit, open the order to correct most likely issue is that the delivery station was not selected. Correct errors and click submit order.



#### Assisting with Troop Order Types

The following functions are troop functions, but SU level users, as permitted by a council, can assist a troop with these orders. For more details on how to enter orders, refer to the Smart Cookies Troop Guide

- Troop Initial Orders
- Planned Orders
- Transfer Orders
- Virtual Cookie Share Orders

To assist a troop, SU level users will follow the steps below.

- Navigate to Orders>type of order
- District (if applicable) and SU will auto-select
- Click on Troop and hit apply
- Complete order as directed.
- To edit orders entered by the troop use the manage orders process.
- All orders must follow the deadlines established by the council

SU level users may not edit any cupboard to troop or troop to cupboard transfers or any initial orders that have been submitted by the council.

#### **Booth**

#### Manage Booths

Based on your council settings, SU level users may be given permission to manage booths. Upload booths using the Booth Upload Template provided by your council. Template can be used to upload locations, locations and times or locations, times and troop assignments as desired. Booths can also be added manually. Booths are owned by the user level that uploads/creates the booths. If a service unit level user creates the booth, both the SU level user and council level users can edit the booth.

#### Create Booth

- Click Create Booth Button
  - Two Tabs Booth Information and Appointment Times
- Manage Booths
  Parkle Standard Tree

  278 Booths

  Standard by Standard Tree

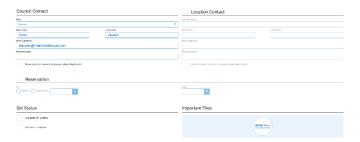
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- Fill in Address Information
  - Store Name
  - Location (shopping center name for example)
  - Booth Location Address be sure to enter accurately to allow for Google Mapping



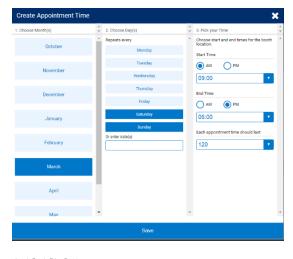
- Contact will default to user entering information but can be changed
  - Available roles are: Service Unit or Troop
- Location Contact Optional can be displayed to troops
- Reservation if checked booth reserved for a specific District or Service Unit until a specific date. Please note, reserved until means that until the date shown only troops in the designated group can select booths scheduled before the date. Booth dates AFTER the reserved date would be available to all troops. For example: if you wish to have ALL booth dates for the location available for only one service unit for the entire sale period you would need to put the end date of the sale. If you wish to restrict all booth dates during a FCFS round but open it to all troops in subsequent rounds, you would still enter the end date of the sale but edit the booth just before the open FCFS round to remove the reservation.
- Select if location is available for lottery (all locations default to FCFS rounds)
- Files can be uploaded if needed and Booth Notes for troops added if desired.
- Click Save to save location information and move to appointment times





#### Click Create Appointment time

- Select Days to add:
  - Choose month and day to repeat (Example every Saturday and Sunday in March),
  - Choose Month and enter actual dates (separate by comma 4,6,8,9,10)
- Select start and end time
- Select length of each appointment (available in 30-minute increments 30 360)
- Save



Jerry's Foods Eden Prairie 9625 Anderson Lakes Pkwy Eden Prairie, MN 55344

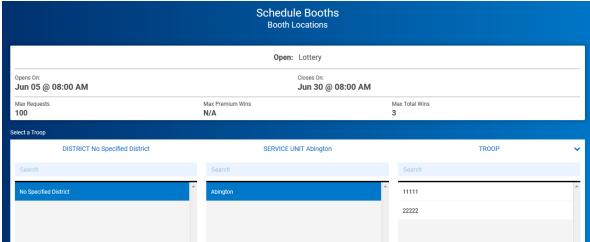


# Schedule Booths

Based on council permissions, a SU manager may have the ability to make requests for troops during the lottery or select booth days and times during the first come first serve rounds. SU with these permissions can also delete a booth for a troop. The troop will be notified by email of the booth selections or cancellations made on their behalf.

#### To schedule booths for troop

- Navigate to Booths>Schedule Booths
- Follow the directions in the troop guide to make selections for either lottery or first come first serve requests



 Service Unit level users can also assist troops with Smart Booth Divider as needed – refer to the troop guide for directions.

#### Rewards

Troops must create Reward (recognition) orders in order for Girl Scouts to receive items they have earned. Refer to the troop guide on how to create an order. As a SU level user, you will have to select the troop to create an order. Use the Action Items on the SU dashboard to quickly view troops who have not created orders or who may have incomplete orders.



## Manage Recognition Orders

SU Level users may, based on council permissions, submit all the recognition orders for troops in their service unit. If your council has an early recognition plan, SU level users will complete this action for the early plan and then for main and troop plans (if applicable) at the end of the sale.

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

Orders						Search		C
							Recognition	Order
	District 🔻	SU 🔻	Troop 🍟	Type 🍟	Date 🍸	Number 🍟	Status 🔻	
	No Specified District	638	26	Main	December 16, 2021	0001571	COMPLETE	2 ft ×

The Recognition Order table will include:

- District (if applicable)
- Service Unit (SU)
- Troop
- Type Main, Early, Troop (as determined by council set up)
- Date
- Number
- Status:
  - INCOMPLETE means an action step needs to be taken before the order can be completed, such as a recognition choice or an apparel size needs to be selected
  - o COMPLETE -no further action needed at this time
  - o S committed by Service Unit
  - D committed by District
  - o C committed by Council
  - T committed by Troop

The following icons may also appear on the grid on the far right. The pencil icon can be clicked to edit the order; trash can to delete the order and check mark to submit the order.

These icons may be disabled if order deadlines are past or if a higher level has already submitted the order.

#### **Submitting Reward Orders**

#### **Review Orders**

- Navigate to Rewards>Manage Recognition Orders
- Filter for Status 'Incomplete'
  - Edit each incomplete order. Girl's orders that need choices selected or sized entered indicated with a red triangle warning flag.
  - o Click on the girl's name and then the level(s) to be corrected
  - o Make appropriate selection or add sizes as needed until all warning flags in the order have been cleared
  - Click Save at the bottom of the grid
- To un-submit an order to make changes, click the un-submit symbol (circle with line through it)



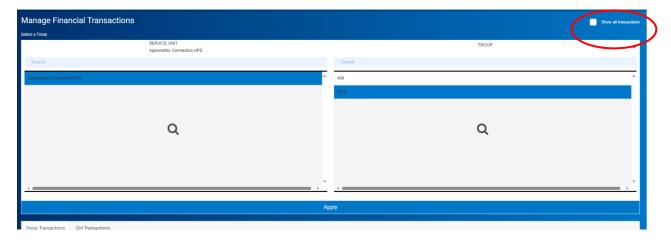
#### **Submit Orders**

- When all orders are in "Complete" status, you are ready to submit all orders at the SU level
- Filter for appropriate type of recognition orders
- Place check mark in upper left blue bar to select all orders
- Click Unsubmit all orders this will ensure that all orders are updated with any late adjustments
- Once all orders are unsubmitted, ensure all are complete and select all again.
- Click Submit All to submit the orders at the SU level. User will receive email when all orders submitted
- Status on all orders will now display as "S".

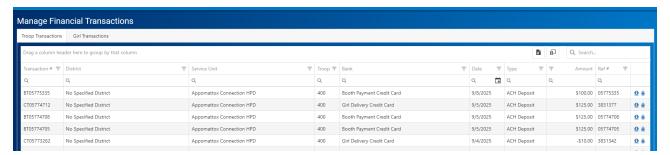
#### **Finances**

#### **Financial Transactions**

The financial transactions can be displayed by selecting a specific troop in your service unit by selecting the troop and hit apply. If you wish to view all financial transactions for troops in your service unit, click the show all transactions box.

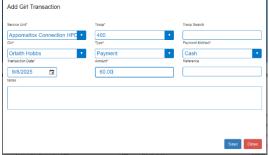


The financial transaction display will have two tabs – troop transactions and girl transactions. On the troop transaction tab all transactions are locked an cannot be edited. Contact your council if you have a question about a locked transaction. Transactions can be exported to excel if desired.



The girl transaction page will display all payments imported from Digital Cookie as well as any payments entered by the troop. Digital Cookie transactions will be locked, however, girl transactions entered by the troop or SU users can be edited. All transactions can be exported to excel as desired.





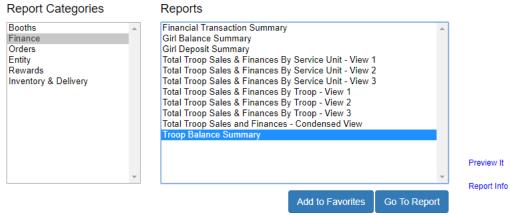
To add a girl transaction, click Add Girl Transaction at the bottom of the page. Enter all required information

#### **Reports**

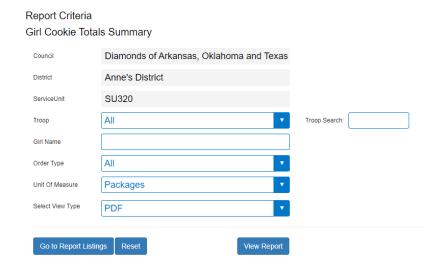
#### Current

Current reports displaying information for the current sales year. Your council will select reports for each user level as part of their set up process.

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



Click "Go to Report" button



- District (if applicable) and SU will auto populate. Additional filters are available for all reports.
- Recommend SU level users to view reports in units of measure as packages and in PDF. Export reports 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

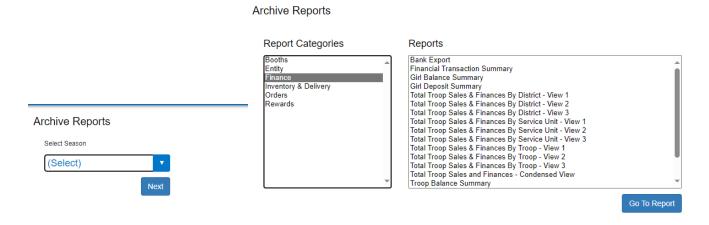
#### Setting Favorite Reports

- 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



#### **Archive Reports**

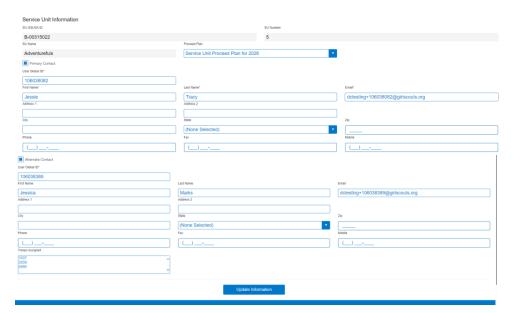
To access archived reports for the prior 3 season, click on Archive Reports. From the drop down menu select the year and next. All available reports will be displayed.



# **My Service Unit**

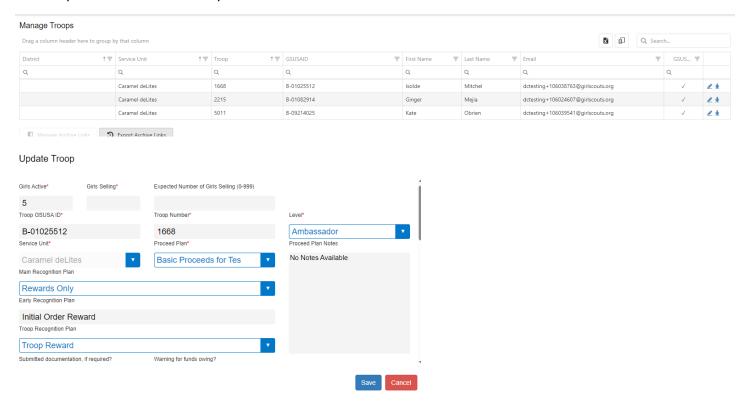
#### Service Unit Info

Service Unit information will be uploaded at the council level. Contact your council as instructed if any greyed -out information is incorrect. If your service unit wishes to have rewards shipped someone other than the SU primary contact, enter that information in the Alternate Contact field. The alternate contact does not have to be entered as a user for the SU. If information is entered in the alternate contact field, the reward shipment will default to this person.



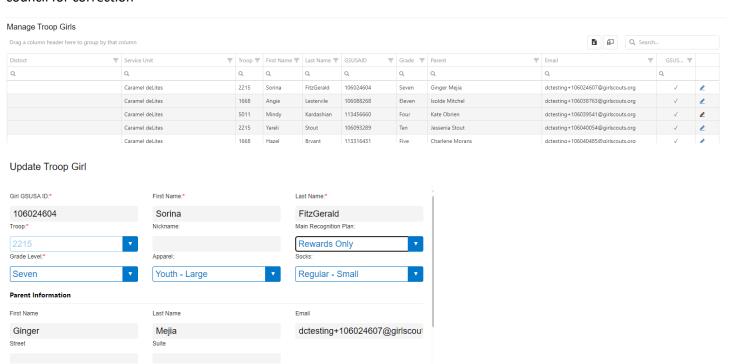
#### **Troops**

A listing of all troops in your service unit will display. Depending on council permissions, you may have the ability to edit some troop information. Click the pencil icon to edit the troop. If any locked troop information is incorrect or the troop is not in your service unit contact your council.



#### Girls

This will display a listing of all girls in your service unit. Information can be exported to excel. SU users have limited ability to edit girl information. If locked girl information is incorrect or the girl is not in your service unit, contact your council for correction



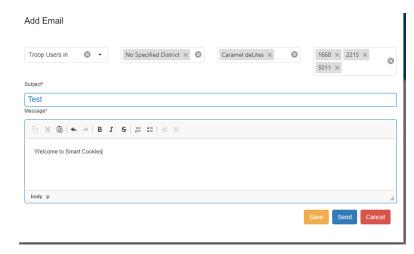
#### **Emails**

Creating an email will send the email to the selected users external email account. The Manage email grid will display all emails created by you and sent to your troops.



#### To add a new email

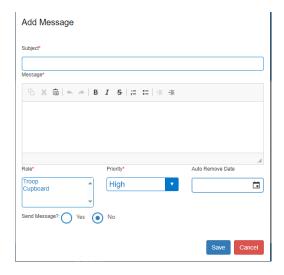
- Click Email
- Click Add New Email
- Select recipients. You can only send emails to troops within your service unit
- Enter subject and body of message
- Click send or Save to send later.



#### Messages

Messages are internal messages that will display on the user dashboard. The user will only be able to see the message when logging into Smart Cookies. To add a new message

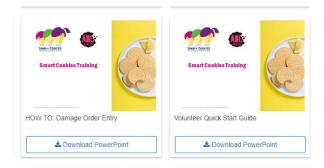
- Click Add New Message
- Enter subject and body of message
- Select roles you are only able to send to troops and cupboards assigned to your service unit
- Indicate priority
- Add auto remove date (not required)
- Click Send Yes or No and Save. If NO is selected the message is saved and you can return at a later date to send.



# **Safety and Training**

#### **Smart Cookies Training**

Clicking on Smart Cookies training will open a series of training PowerPoints related to tasks in Smart Cookies.

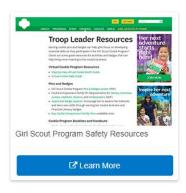


#### Safety

Clicking on Smart Cookies Safety will display a link to learn more about Safety Resources from GSUSA

# Safety

Review safety information to ensure girls, parents, Resources for cookie sellers.



# Help

Click on the help tab to display Help Desk information. The help desk is specifically trained to assist volunteers with routine tasks in Smart Cookies. They are not able to answer questions regarding council specific programs or any Digital Cookie questions.

# Help

# Need help using the Smart Cookies platform? Call us at 1-800-853-3730 or email us at ABC SmartCookieTech@hearthsidefoods.com Questions about our cookies? Check out our Cookie FAQ's or email us your questions or concerns at ABC SmartCookieBakers@hearthsidefoods.com