Troop Smart Cookies User Guide

www.abcsmartcookies.com
Login name: __________________
Password: __________________

Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Troop Dashboard</td>
<td>3</td>
</tr>
<tr>
<td>My Troop</td>
<td>4</td>
</tr>
<tr>
<td>Manage Orders</td>
<td>5</td>
</tr>
<tr>
<td>Transfer Orders</td>
<td>7</td>
</tr>
<tr>
<td>Planned Orders</td>
<td>11</td>
</tr>
<tr>
<td>Virtual Cookie Share</td>
<td>15</td>
</tr>
<tr>
<td>Finances</td>
<td>16</td>
</tr>
<tr>
<td>Reports</td>
<td>19</td>
</tr>
</tbody>
</table>

Overview

Smart Cookies is the system to manage your troop cookie program. This guide will introduce you to the system key points that you will need to use throughout the program. If you have more in-depth questions throughout the season, contact your service unit cookie manager or our customer care team at customercare@gsctx.org or 800-733-0011.

At the start of the season, you will receive an email from noreply@smartcookies.com. This email contains the link to setup your password. All girls and troop cookie managers will receive access to Smart Cookies this way. However, the screens and functionality are different based on those profiles. Be sure you are logging in with your credentials as a troop cookie manager. Girl Scouts of Central Texas will upload all users (including girls). Your login screen should look like this:
If you have more than one troop associated with that email, a window will appear that will allow you to choose which troop you would like to work in:

If you have multiple troops linked to the same email address you can easily switch between the troops while working by clicking the person in the top left corner of your screen. You will see a drop down. Click on Switch User:

Let's introduce some cookie jargon before we go any further.

**Key Words:**

**Initial Order** – This is the first order a troop cookie manager makes. It is itemized by girl so each girl will start with those cookies in her personal inventory and be credited with the balance due.

**Planned Order** – Any order after the initial order. These cookies will be received from the service unit cupboard. These cookies will be transferred to the troop inventory.

**Transfer** – This is the movement of cookie inventory and can be troop to troop, girl to girl or troop to girl. This will affect both her sales and her finances within the system.

**Virtual Cookie Share** – Where Operation Cookie packages populate. These add to girl/troop total sales.

**Cupboard** – This is where troops can place planned orders to restock their inventory.

**Manage Order Key:**

**Type:**

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<tr>
<td>I</td>
<td>Initial Order</td>
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<tr>
<td>R</td>
<td>Reorder (Operation Cookie)</td>
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</tbody>
</table>

**Status:**

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<td>U</td>
<td>Uncommitted</td>
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<tr>
<td>T</td>
<td>Troop Committed</td>
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</table>
T – Transfer  
P – Planned Order (get more cookies for my troop)  
S – Service Unit Committed  
C – Council Committed  

**Cookie Variety Abbreviation:**  
CShare – Virtual Cookie Order (Operation Cookie)  
ADV – Adventurefuls  
Toast-Yay! – Toast-Yay!  
LEM – Lemonades  
T – Trefoils  
TM – Thin Mints  
PBP – Peanut Butter Patties  
CD – Caramel deLites  
PBS – Peanut Butter Sandwich  
GFC – Gluten Free (limited quantity)

**Troop Dashboard**

Below depicts the home screen (where all troop information is listed). Make sure to click the refresh button every time you log in for the most up to date information.

![Troop Dashboard Image]

**Inventory:** Total Ordered  
Total packages troop ordered

**Total Sold:**  
Total packages assigned to a girl

**Total On Hand:**  
Difference between the two
Sold by Cookies – Shows you by girl what has been assigned. This table will default to packages, but you can switch to cases or cases/packages.

For more detail by girl click on the 3 dots next to the girl’s name.

**My Troop**

Under My Troop Tab you will see the following links:

**Goals & Online Activities** – Overview of your troop goals and progress.

**Troop Roster** – List of registered girls in Smart Cookies (if missing any girls, email products@gsctx.org). Only registered Girl Scouts will be uploaded to the system.

**Troop Information** – Update your reward plan and confirm your bank account information.
**Troop User Management** – Shows troop users and girl user information.

Registered – Has logged in to Smart Cookies and is an active user
Pending Notification – Has not logged in but received an email to register

**Troop Message** – Send out emails to the girls in your troop

**Tasks** - You can add any important task you want your girls/parents to know

**Orders**

Whenever you need to work with your cookie inventory you will go to the Orders tab.

**Manage Orders**

On the Manage order page, the top 4 boxes will show all transfers that the troop has conducted and is shown in case quantity and in total dollar value.

- **Planned** – orders that have not been credited to your troop (meaning not in troop inventory).
- **Ordered** – all cookie orders (Initial, transfer, reorders) received by the troop.
- **Sold** – all cookies that have been transferred to girls or reported as sold at booth sales.
- **On Hand** – all cookies that are not credited to a girl’s sale. This is the cookies in the troop inventory.
In the middle of the Manage order page, you can expand the information shown using the filters and search parameters. Here are a few scenarios:

- Click “Show Transactions” under the specific boxes (in the above we are using the Show Transactions for the Ordered box) and only those types of transactions will appear on the lower half of the page.
- To view ALL the transactions the troop has conducted, check the “All” Button, then click “Apply Search Parameters” and all transactions will appear on the lower half of the page.
- To view only certain transactions, check the type of order you want to view, then click “Apply Search Parameters” and only that type of order will appear on the lower half of the page.
- You can also use the radio button to toggle between cases, packages, or cases/packages.
- The transactions filtered and shown can be exported into an Excel spreadsheet.

The bottom of the Manage order page will show the detail of those filtered transactions. For even more specifics, click “Click the Arrow for More” option.

The “Details” button within each box will provide a breakdown of each variety set in cases and the total dollar value within each variety.
Transfer Orders

There are three different types of transfer orders you will do as a troop cookie manager. These include a troop to girl (T2G), girl to troop (G2T) and girl to girl (G2G). Transfers are simply moving cookies from one inventory to another. To transfer cookies, go to the Order tab and select “Transfer Order.” The first dropdown will allow you to select what type of transfer.

Troop to Girl (T2G) Transfers

- Type of Transfer – Select the appropriate transfer.
- As a troop user, the service unit and troop number will already be pre-populated in the selection screen.
- Click on which girl in the troop will receive the transfer or you can search by the girl’s name in the girl search field.
- Click the “Reset” arrow on the far right to reset your filters if necessary.
- Once filters are set, click “Apply.”
Enter the quantities of cookies being transferred.
- Two types of transfers can be entered on this page: “Packages” and “Booth Packages.”
- In the Package column, enter the number of packages being transferred to the Girl Scout by variety to give her credit for those sales as well as financial responsibility.
- If you are using the “Booth Packages” column, the credit for the sale goes towards her recognitions, but she does not assume financial responsibility. The system is built with the assumption that money is typically collected by the troop at the time of the sale.
- Enter any “Order Notes” if needed.
- Click Save.

Once the transfer is saved, click “Print Receipt” at the bottom of the page to see a printable confirmation page containing the following information:
- Date and time of transfer
- Type of transfer
- Where the transfer came “From” and where it's going “To”
- The amount of each variety transferred in the variety section
- Click Print to create a hardcopy of the transfer

You will see the option to “Go to Manage Orders” to view it or “Make Another Transfer” to transfer more cookies. Note that the numbers of packages of each variety that you have transferred to the girl have been removed from the troop inventory and credited to the girl's inventory. Financial responsibility of the non-booth packages transferred is now credited to the Girl Scout (see the Girl Balance Summary report).

**Girl to Troop (G2T) Transfers**
• Type of transfer: Select the girl to troop option from the drop-down menu.
• As a troop user, the service unit and troop number will pre-populate in the selection screen.
• Click on the girl in the troop that the transfer is from or you can search by the girl’s name in the search field.
• Click the “Reset” arrow on the far right to reset your filters if necessary.
• Once filters are set, Click Apply.

• Enter transfer in package quantity.
• In the Package column, enter the number of packages being transferred from the girl by variety to the troop.
• The girl will no longer assume financial responsibility for these packages.
• Enter any “Order Notes” if needed.
• Click Save.

**Girl to Girl (G2G) Transfers**
Type of transfer: Select the “Girl to Girl” option from the drop-down menu.
As a Troop User, the service unit and troop number will pre-populate in the selection screen.
Click on the girl who is transferring cookies from her inventory.
In the second set of boxes, select the girl who is receiving the cookies in her inventory.
Click the “Reset” arrow on the far right to reset your filters if necessary.
Once filters are set, Click Apply.

Enter transfer in package quantity.
In the “Packages” column, enter the number of packages being transferred from the girl by variety.
The girl transferring cookies from her inventory will no longer assume financial responsibility for these packages.
Enter any “Order Notes” if desired. (Situational notes to jog your memory may be helpful.)
Click Save.
To view all transfer orders, go to Orders->Manage Orders->Transfer carrot:

Transfers are conducted to manage the inventory within the troop (G2T, T2G or G2G). To view the transfers conducted thus far, click on the dropdown arrow next to transfers, check “All” to view all transfer activity or check only the transfers needed and they will appear on the screen.

- The Transactions show the following information:
  - Date the Transfer transaction was entered
  - Order #
  - Type of Transfer – G2G, G2T, T2G, T2T, T2C, C2T,
  - Who is receiving the transfer
  - Who is giving the transfer
  - The quantity of each variety which can be viewed in Cases or Packages or Case/Package Unit of Measure
  - The Total in Quantity and in Total Dollar Value

Depending on the type of transfer, you can “View the Order” or “Edit” the order. There can be multiple pages of transactions, use the number tab on the bottom to click to the next page. The chosen transaction(s) can be viewed in an Excel spreadsheet and again, the “Summary” and the “Click the Arrow for More” option located at the bottom of the page will provide the total details of what has been filtered.

**Planned Orders**

Planned orders are how you receive more inventory from your service unit cookie cupboard.
• Select Orders->Planned Order.
• Select your cupboard.
• Select pick up time and date.
• Enter the number of cookies by variety (in cases).
• Click Save and return to manage orders.

The Planned Order screen shows the troop number, troop contact information and the list of cupboards available to the troop. Choose the cupboard by clicking on and highlighting it, then click continue.

After you have selected the cupboard, a list of dates will appear indicating which days the cupboard is available.
• Select a date and click continue to populate available times.
• Click save to submit the order.
• The planned order grid will be shown below listing all varieties on the left and the Unit of Measure on the far right.
• Place any order notes for future reference.
• Click Save.

After the order is saved, a confirmation message will appear and the planned order number will be shown at the top of the page.

The planned order can be printed by clicking on “Print Receipt.”
The receipt will provide the location, date, and time selected, along with the order details.
The receipt will be labeled at the top ‘Planned Order Receipt’ - Not APPROVED, indicating that the planned order has not yet been picked up.

Once you have picked up the planned order from the assigned cupboard, the cupboard manager will approve it. This action will convert it to a cupboard to troop transfer (C2T) and will be shown in the Managed Orders screen under transfers.

After the order has been converted into a C2T transfer and you click on “Print Receipt” again, it will be labeled at the top: “Transfer Order Receipt - ‘Approved Planned Order’.

An email confirming the transfer will be sent to the troop’s assigned email address.

To view your Planned Orders, go to the Manage Order Tab:
• Click on the “Show Transactions” button in the “Planned” box at the top of the page or “check” the planned filter and then click “Apply Search Parameters.”
• The transaction(s) will appear on the grid showing the following information:
  • Date the planned order was entered
  • Order number
  • Type of transaction – They are kept as “Planned” until the cupboard manager approves them. Once approved, the Planned orders are converted into a Cupboard to Troop Transfer (C2T).
  • Troop number receiving the order
  • The quantity of each variety which can be viewed in “Case” or “Package” or “Case/Package” unit of measure.

Booths

Contact your service unit cookie manager if your troop is interested in participating in cookie booths. Each service unit has the autonomy to distribute booths in the best way they see fit for their area. Some will use Smart Cookies to distribute booths. Here are some directions, if your service unit chooses to utilize the Smart Cookies system for booths.

To secure a booth in Smart Cookies:
• Go to the Booth tab and ‘Schedule a Booth’
• Smart Cookies will populate a map with available booths
• You can filter your search by zip code, location name, or date
• Select the desired location
• Available dates will have a hyperlink
• Once you select an available date, the available times will then appear at the bottom of the screen
• Select a time and click ‘Save’
• You should see a popup window stating “FCFS Booth Reserved Successfully”
Virtual Cookie Share Orders (Operation Cookie)

Virtual Cookie Share (Operation Cookie): Orders-> Virtual Cookie Share

Virtual Cookie Share packages are credited to both the troop and the girl ordering, but not physically delivered to the troop or girl. Cookie Share packages add to the council, troop and girl overall sales number and financial responsibility. Though the physical distribution of the cookies is handled by council, the sale counts towards reward calculations (proceeds and recognitions).

- The unit of measure (UOM) is set in “Package” quantities.
• You may enter one order or multiple orders until the end of the sale.
• Enter each girl’s total in **package** quantities and please note that girls’ names may continue multiple pages.
• Enter any “Order Notes” if needed.
• Click Save.

To view Virtual Cookie Share orders, go to Manage Order:

- Check the “Cookie Share” filter and click “Apply Search Parameters.”
- The Virtual Cookie Shares will populate (as shown) with the following information:
  - Date the order was entered
  - The order number
  - The type
  - Troop number
  - The amount of Cookie Share in packages
  - Total in packages
  - Total in Dollar amount
- To edit the order, click on the 3 dots on the right, make the changes necessary and click Save.

**Finances**

**Troops will not be allowed to enter in troop financial transactions. They will only be allowed to enter in girl payments. These are payments you receive from the girl or her family to pay for her cookie inventory.**

To enter girl financial transactions:
Click on Girl Transactions, then Add Girl Transactions:
The “Add Girl Transaction” box will appear as shown. Fill in all the information needed. (Consider adding a check number in the Reference box) Click “Save.”

The bottom screen shows where the transaction was added.

Click on the Girl Balance Summary Report link to view the financial report of individual girls.

When you click on either the Troop Balance or Girl Balance Summary Report, the following criteria will appear. Fill in the data where needed and click on “View Report.”

The Report will appear where it can be downloaded or printed.
Reports Tab

Choose from either “Current” reports or “Archived.”

You may designate up to 10 favorite reports. To mark a report as a Favorite, select the report name in the “Reports” field, then click the “Add to Favorites” link to the right of the reports field.

If you want a description of what information a report is going to give you, click on the report and then “Report Info.” You will see a window of information:

Questions? Contact your service unit cookie manager or council staff at customercare@gscctx.org or products@gscctx.org.

Thank you so much for your continued support to the Girl Scout mission and delivery.