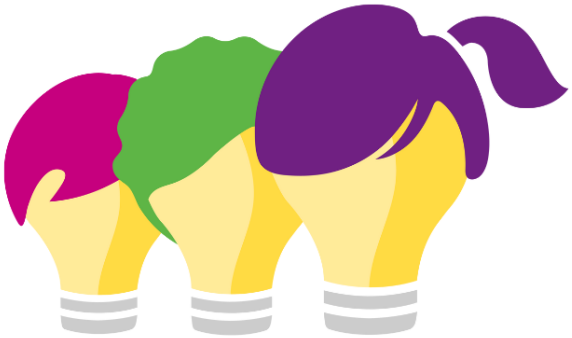

Service Unit User Guide

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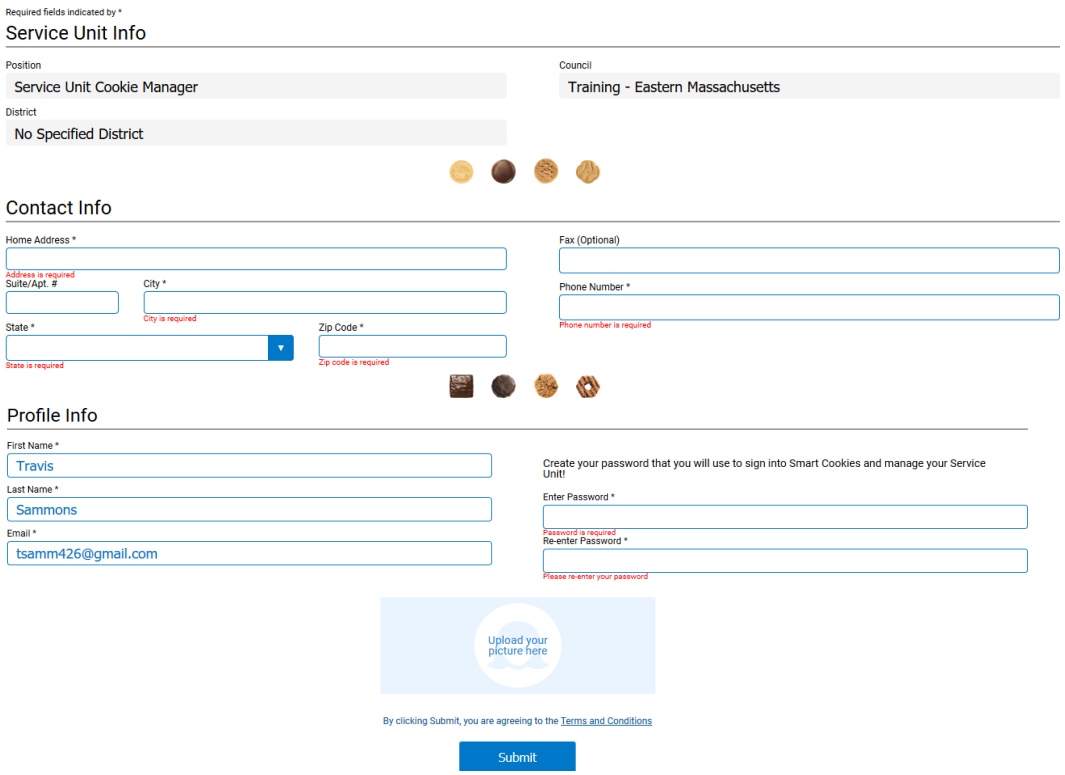
Registering for Smart Cookies

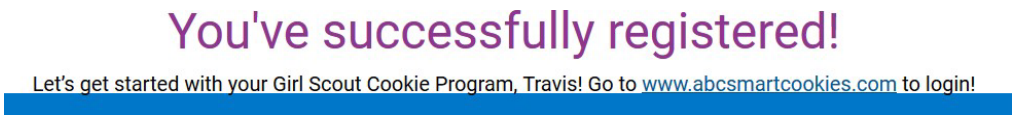
Your council will upload your information in Smart Cookies and you will receive an email from noreply@abcsmartcookies.com.

> 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.

- 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.

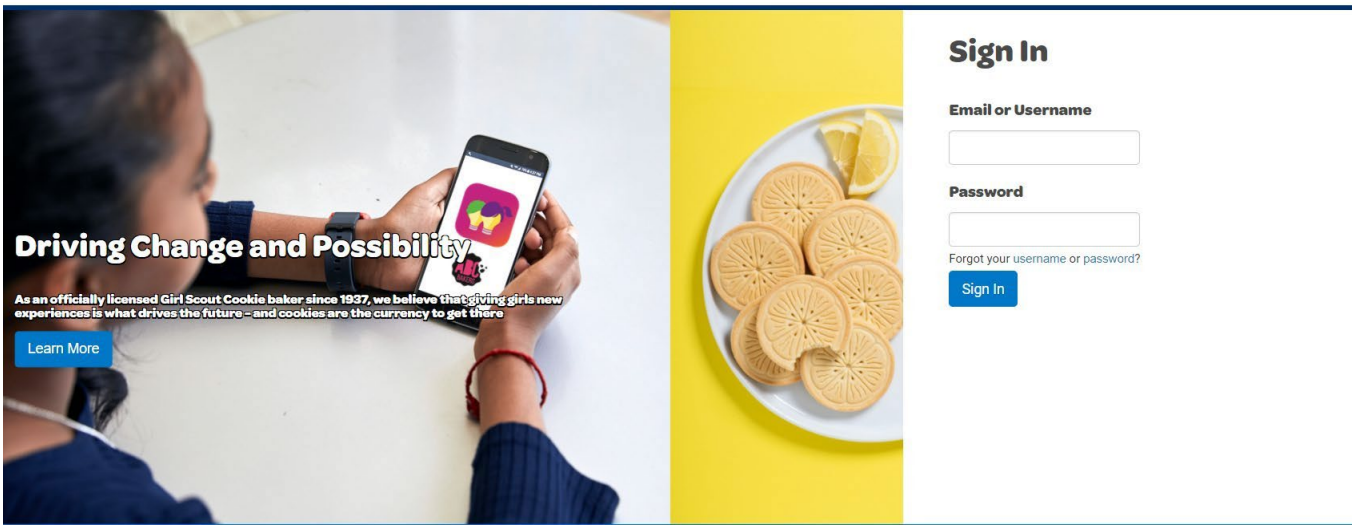


- After you click “Submit”, a confirmation page will appear:

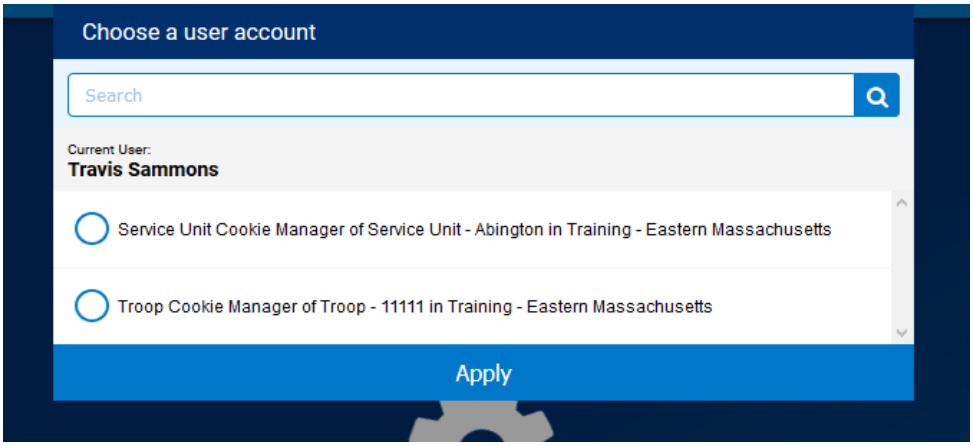


Logging into Smart Cookies

Go to https://www.abcsmartcookies.com/

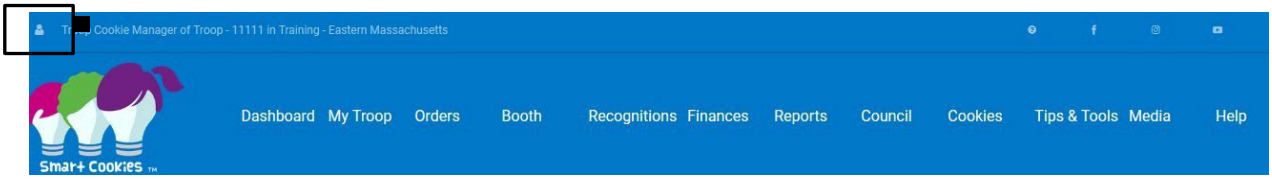


- Login with the credentials (user name=email & password) you created in registration
    - If you forget your password you can click the Forgot Password Link
    - Users with multiple roles (SU and troop user for example) will need to choose the role you wish to apply. Users with one account will go directly to the dashboard.



- 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



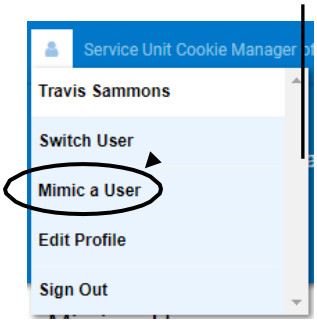
Click the person icon in the upper left corner.

Select Switch User to change roles (see screen shot above)

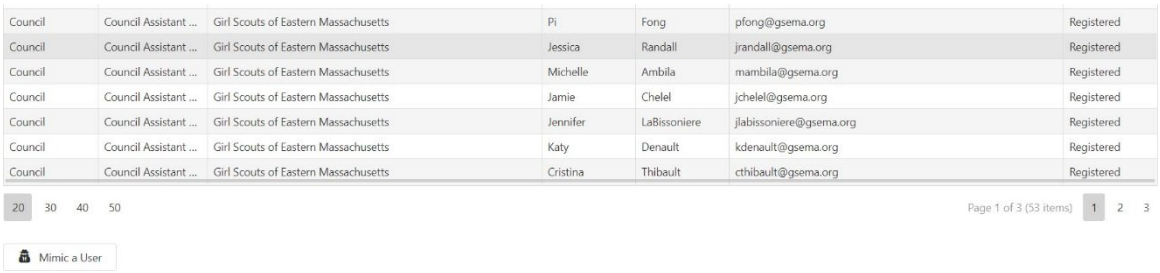
Mimic a User

SU level users can mimic troop level users in their assigned service unit as needed to assist the troop level volunteer.

- Click the person icon in the top-left of the page and click Mimic a User

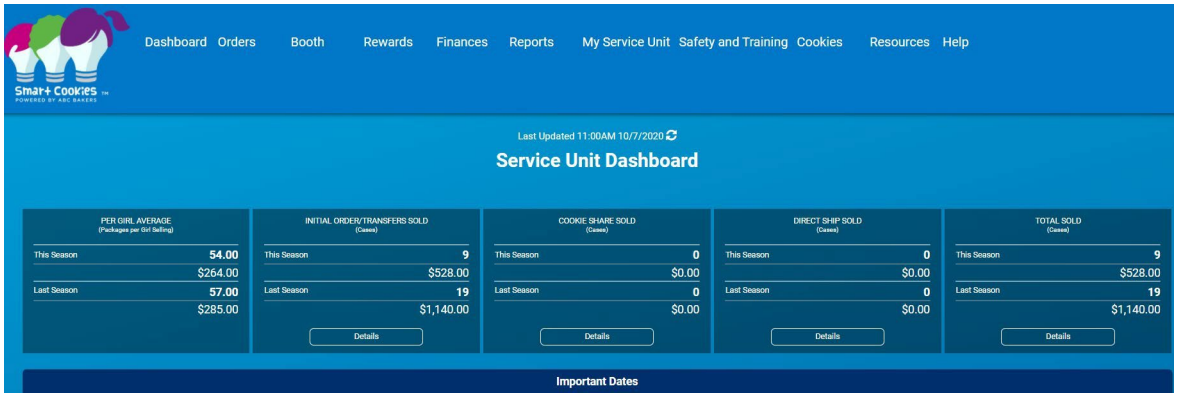


- A list of users available to mimic will appear
- Highlight the user and click Mimic a User
- Confirm the user to mimic and you will be taken to that user's dashboard



- After all activity required is completed, go to the top-left again and click End Mimicking Session.

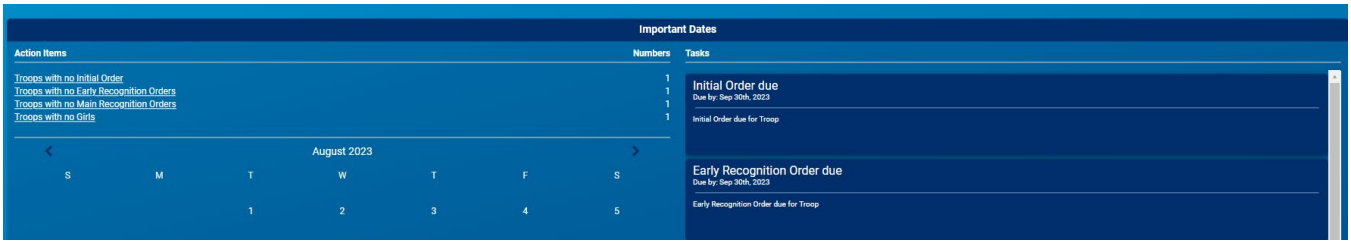
Service Unit Dashboard



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.

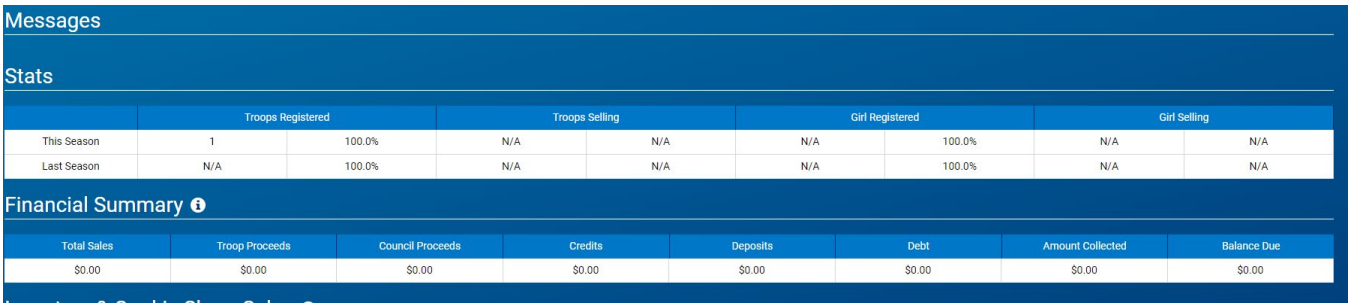
The there are Key Performance Indicators in the top 5 boxes. You can click Details in boxes to expand the information

- 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.

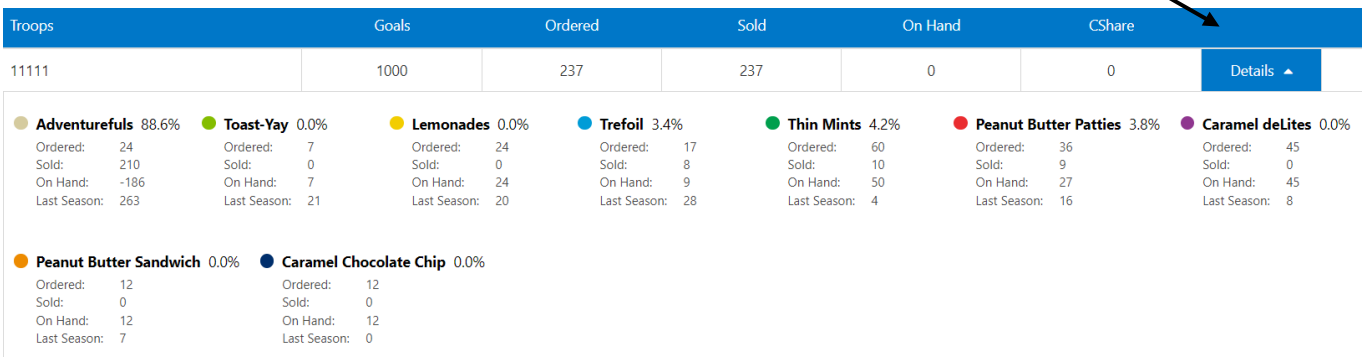


The next section has to do with important dates and tasks

- 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
  - Incomplete Recognition Orders
  -
- Calendar – dates highlighted in green have a task assigned
- Tasks – a listing of key dates as entered by your council

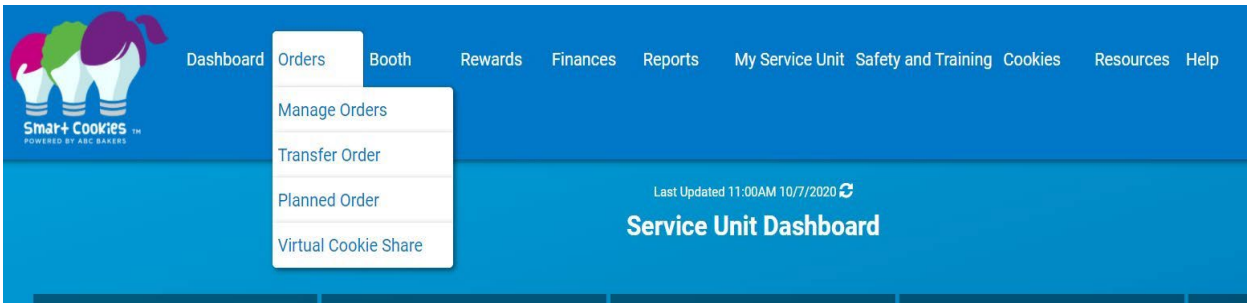


- Girls Registered and Selling
- Financial Summary – Total Sales, Troop Proceeds, Council Proceeds (total amount due to Council), Credits, Deposits, Debt, Amount Collected (by Council), and Balance Due (to Council)
- Inventory & Cookie Share Sales – total inventory, by cookie variety, ordered by all 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"):



Navigating through Smart Cookies

To navigate through Smart Cookies, you will use the ribbon at the top of the page:



There are multiple tabs in Smart Cookies with their own set of action items:

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

Orders

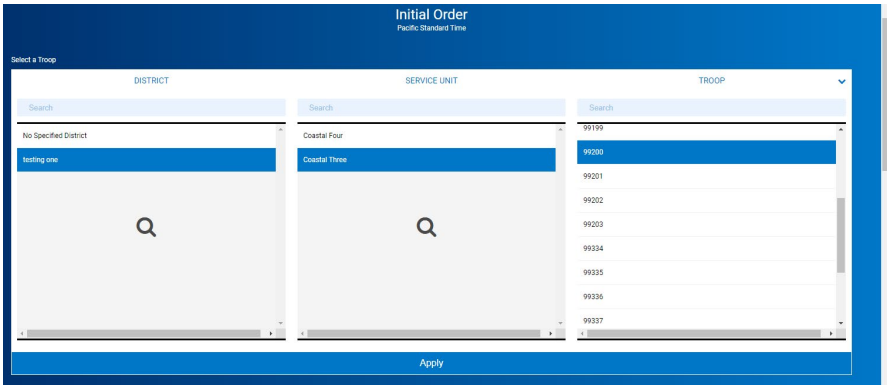
The following functions are troop functions, but SU level users, as permitted by a council, can assist a troop with these orders. To view directions on how to enter the orders, refer to the Smart Cookies Troop Guide.

- 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.

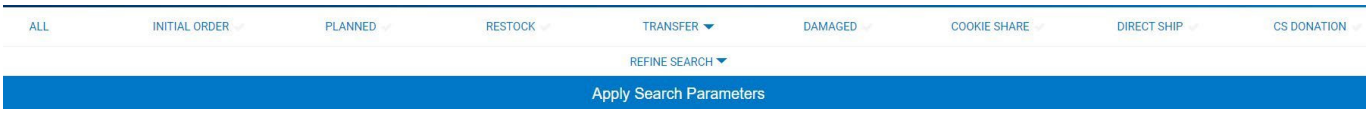


Manage Orders

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.

Filtering Orders



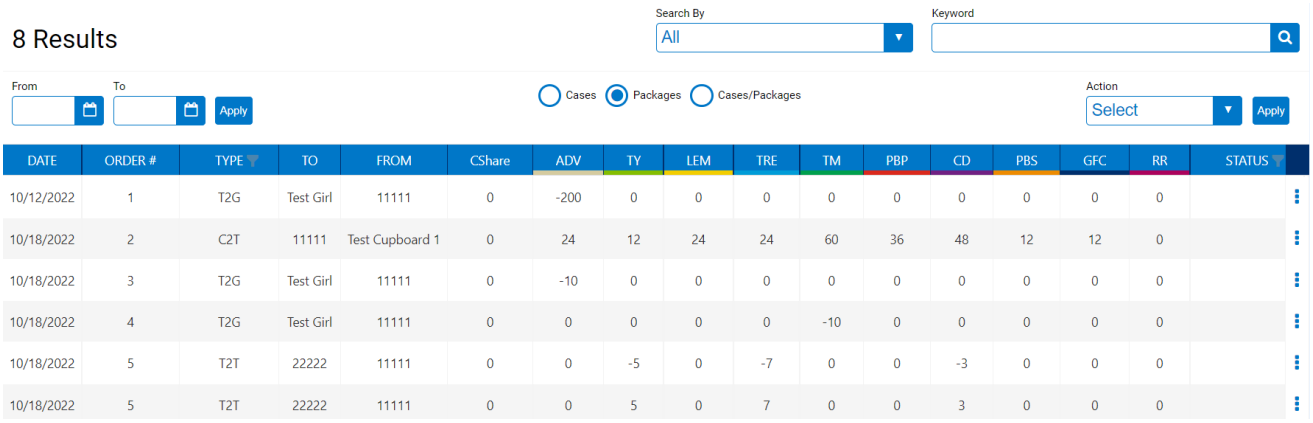
Available filters include:

- All – selects all filters to display all orders for troops in a Service Unit
- Initial Order – shows all troop initial orders.
- Planned – shows only orders that are yet to be picked up in a cupboard
- Restock – will not display orders at SU Level
- Transfer – displays transfer orders
    - Must choose type of transfers
    - If user wishes 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 and tracked cookie share orders
- Direct Ship – shows all orders processed through Ship only on DC Cloud
- CS Donation – Council level function only

The Refine Search feature allows users to further limit the orders to display – for instance only orders for a specific troop.

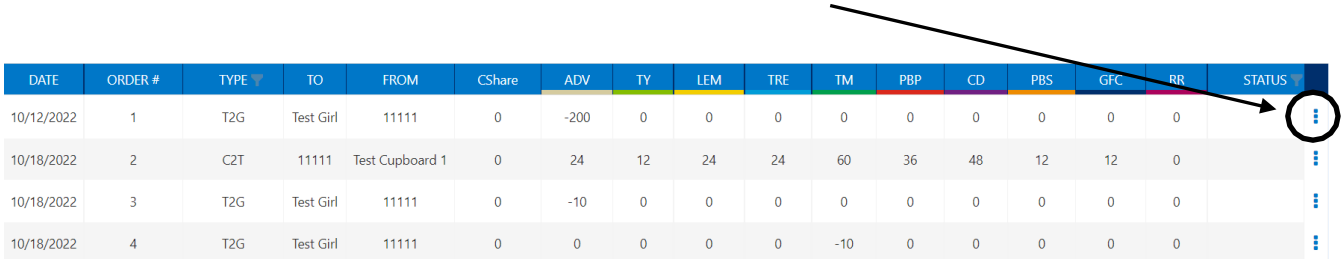
- Select the desired filters and click Apply Search Parameters to display the desired orders.
- Click Clear all filters to remove all of the selected filters and re-select.

The Manage Order table appears as follows:



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	

- Results are searchable via keyword, order number or date range (From/To).
- Orders can be viewed in Cases, Packages, or Cases/Packages.
- All columns are able to be sorted as well, just click on the header.



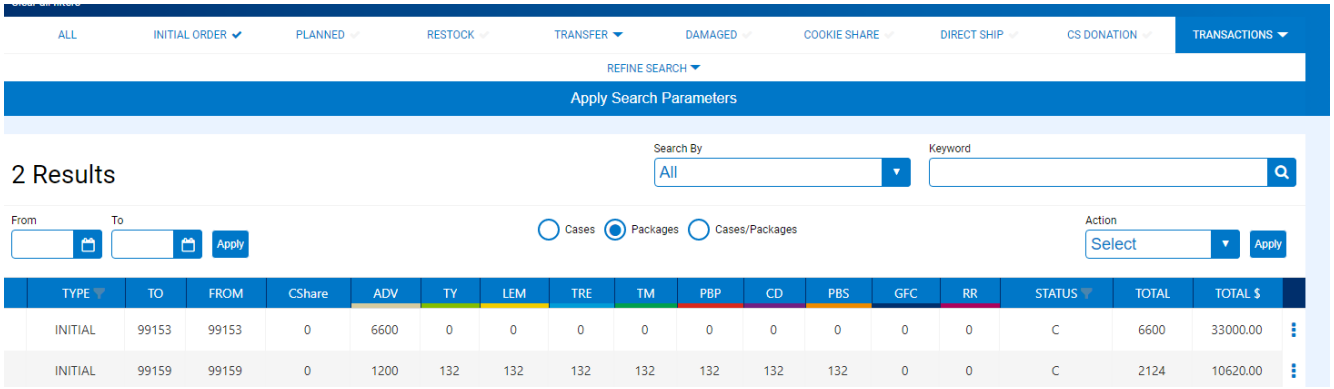
DATE	ORDER #	TYPE	TO	FROM	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	RR	STATUS
10/12/2022	1	T2G	Test Girl	11111	0	-200	0	0	0	0	0	0	0	0	0	
10/18/2022	2	C2T	11111	Test Cupboard 1	0	24	12	24	24	60	36	48	12	12	0	
10/18/2022	3	T2G	Test Girl	11111	0	-10	0	0	0	0	0	0	0	0	0	
10/18/2022	4	T2G	Test Girl	11111	0	0	0	0	0	-10	0	0	0	0	0	

- 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 (if applicable) 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.



Booth

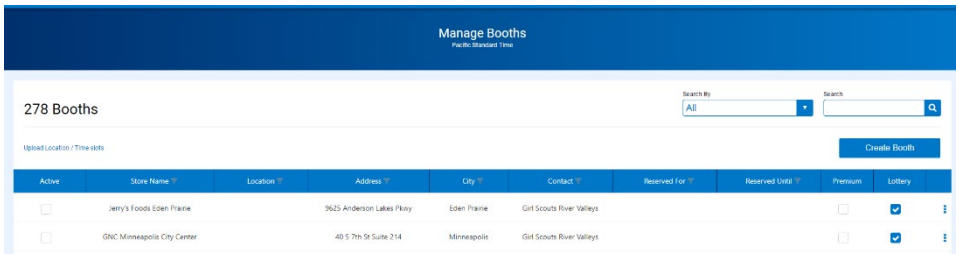
Manage Booths

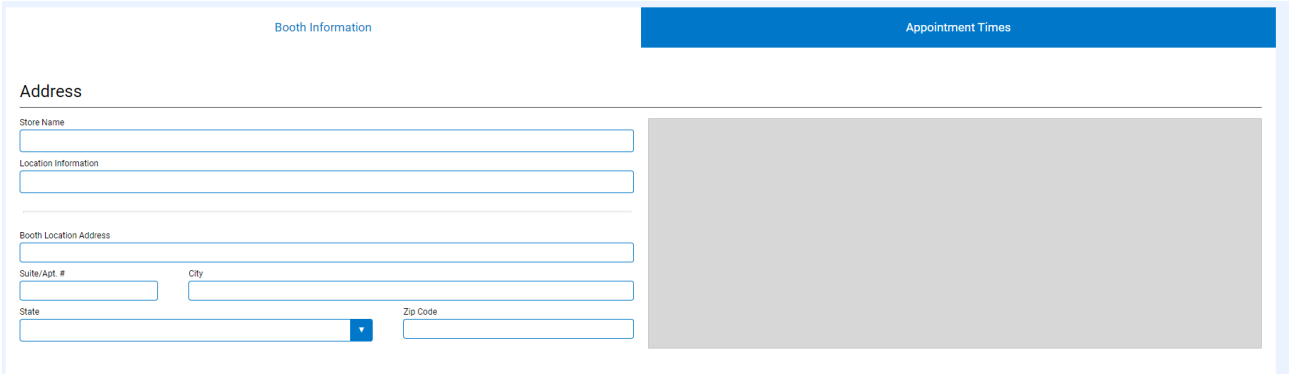
Based on your council settings, SU level users may be given permission to manage booths. Upload booths using the Booth Upload Template provided by your council. Template can be used to upload locations, locations and times or locations, times and troop assignments as desired.

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, only that user and council level users can edit the booth.

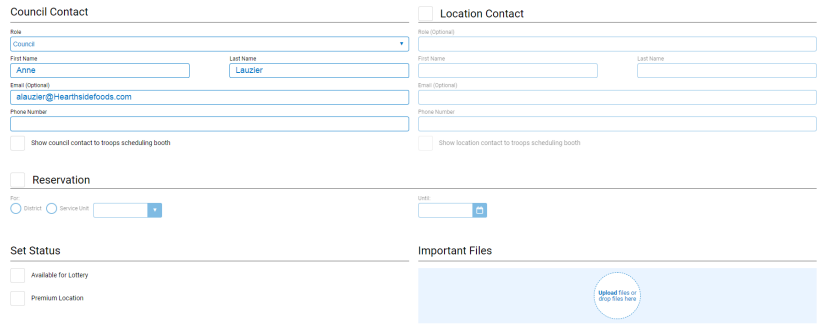
Create Booth

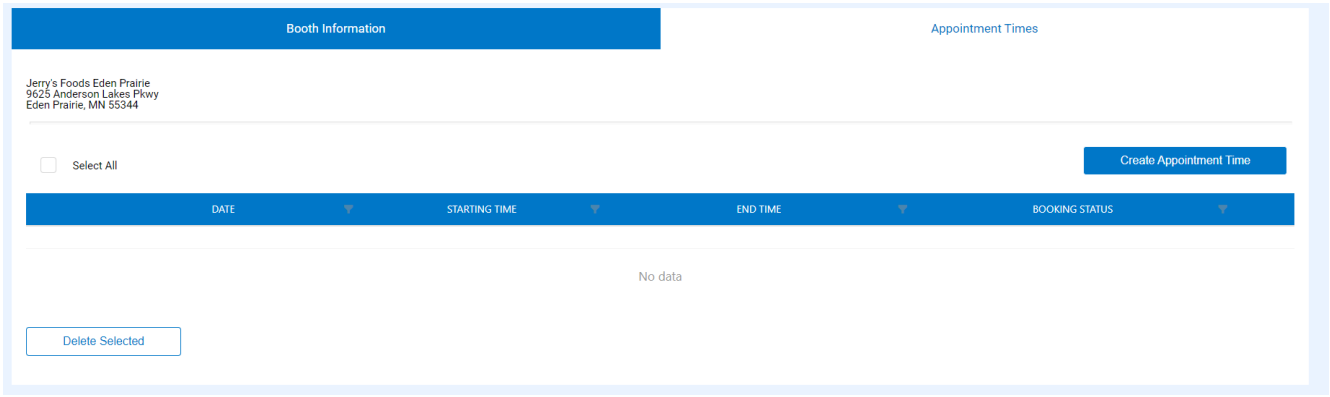
- Click Create Booth Button
  - Two Tabs – Booth Information and Appointment Times
- Fill in Address Information
  - Store Name
  - Location (shopping center name for example)
  - Booth Location Address – be sure to enter accurately to allow for Google Mapping





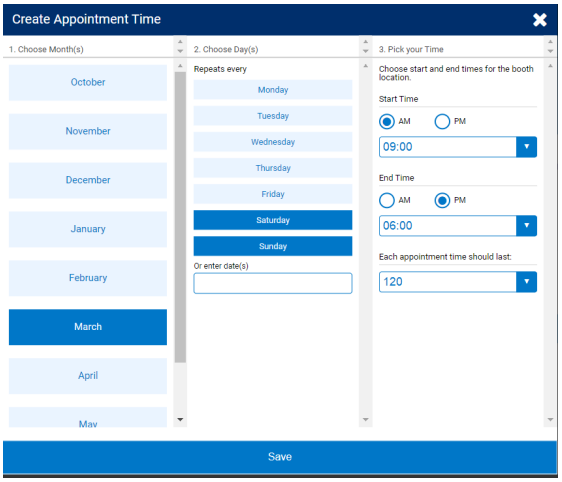
- Contact will default to user entering information but can be changed
  - Available roles are: Service Unit or Troop
- Location Contact Optional – can be displayed to troops
- Reservation – if checked booth reserved for a specific District or Service Unit until a specific date. Please note, reserved 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

Select All

Create Appointment Time

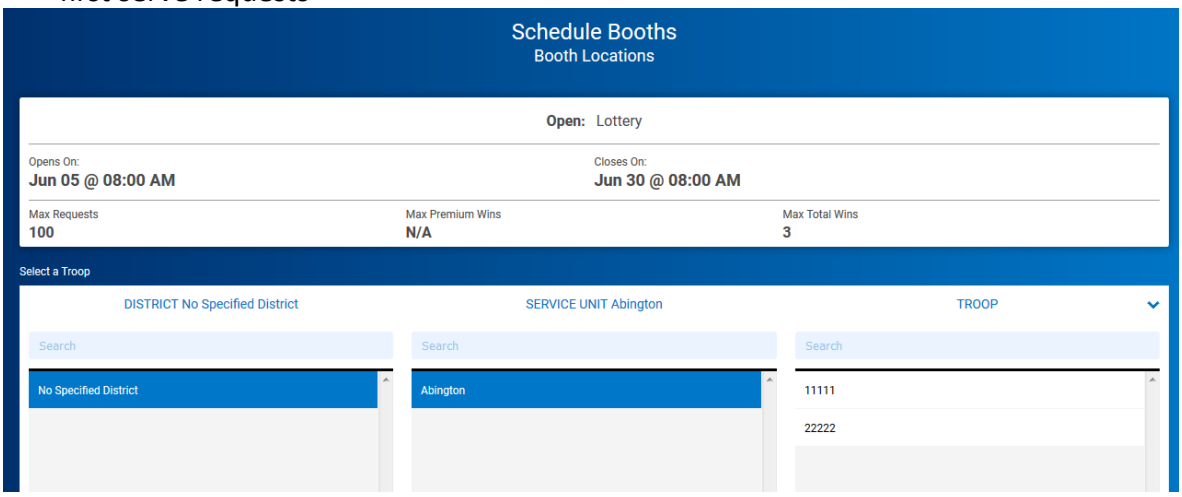
DATE	STARTING TIME	END TIME	BOOKING STATUS
2023-04-01	8:00 AM	10:00 AM	AVAILABLE
2023-04-01	10:00 AM	12:00 PM	AVAILABLE
2023-04-01	12:00 PM	2:00 PM	AVAILABLE
2023-04-01	2:00 PM	4:00 PM	AVAILABLE

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

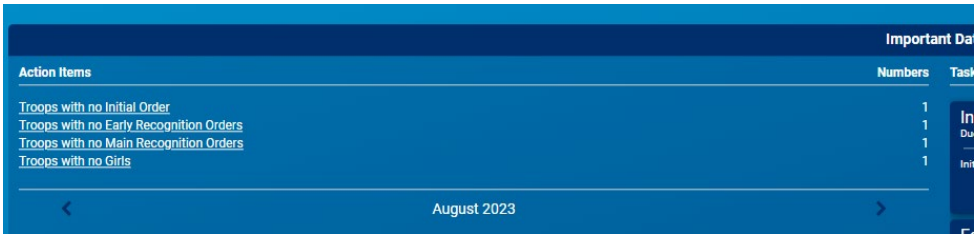


- Service Unit level users can also assist troops with Smart Booth Divider as needed – refer to the troop guide for directions.

Rewards

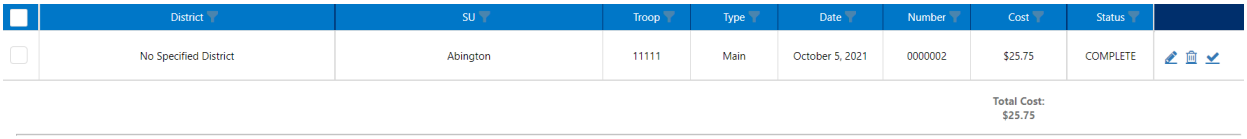
Troops must create Reward (recognition) orders in order for Girl Scouts to receive items they have earned. Refer to the troop guide on how to create an order. As a SU level user, you will have to select the troop to create an order.

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:



The Recognition Order table will include:

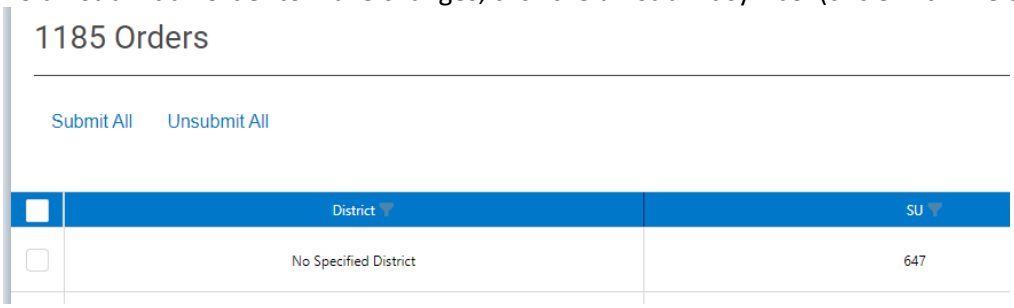
- District (if applicable)
- Service Unit (SU)
- Troop
- Type – Main, Early, Troop (as determined by council set up)
- Date
- Number
- Status – there are multiple statuses the order can have:
    - INCOMPLETE – means an action step needs to be taken before the order can be completed, such as a recognition 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
    - 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. Girls orders that need choices selected or sized entered indicated with a red triangle warning flag.
    - Click on the girl name and then the level(s) to be corrected
    - 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

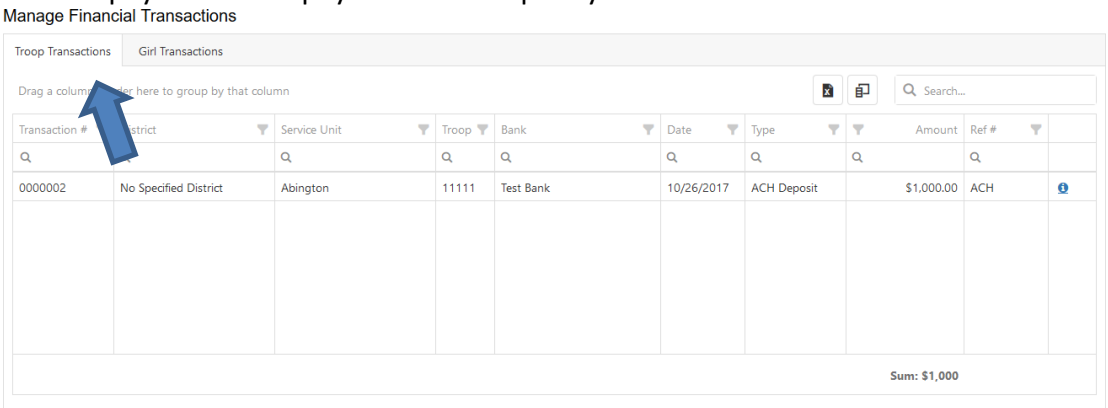
- When all orders are in "Complete" status, you are ready to submit all orders at the SU level
- Filter for appropriate type of recognition orders
- Place check mark in upper left blue bar to select all orders
- Click Submit All to submit the orders at the SU level. User will receive email when all orders submitted
- Status on all orders will now display as "S".

Finances

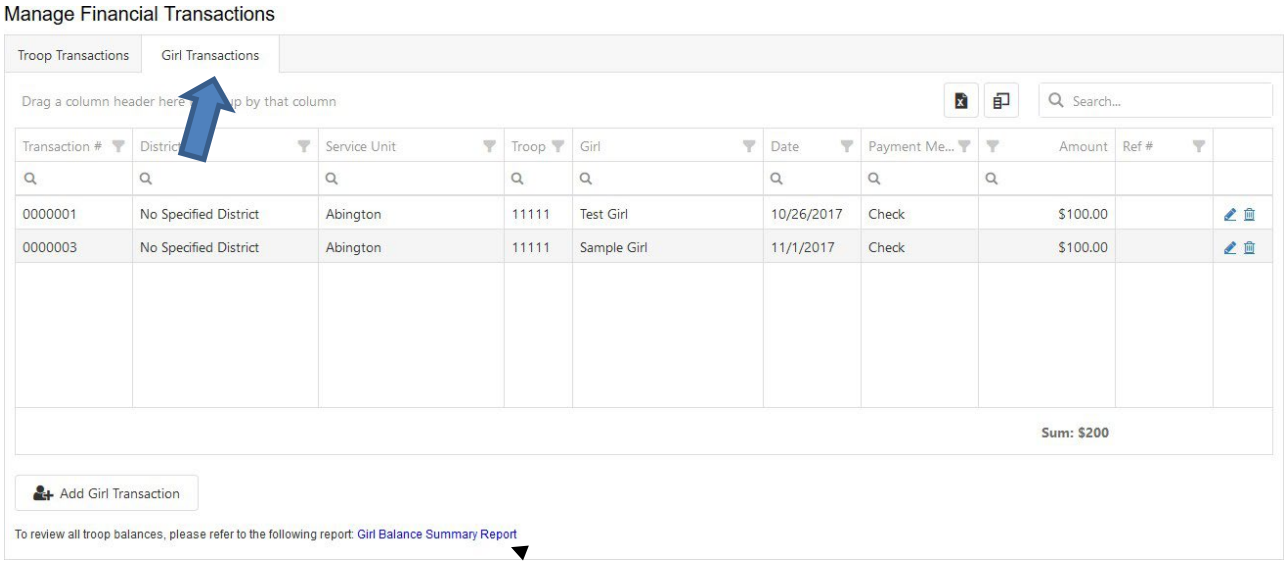
Financial Transactions

The financial transactions page has two tabs:

- **Troop Transactions** – displays payments for troops received by Council including any payments to Council via ACH; booth and girl delivery credit card payments and payments for ship only orders.



- **Girl Transactions** – Displays all payments entered by the troop for money collected from the girl/caregiver as well as all girl delivery credit card payments as well as Ship Only order payments.



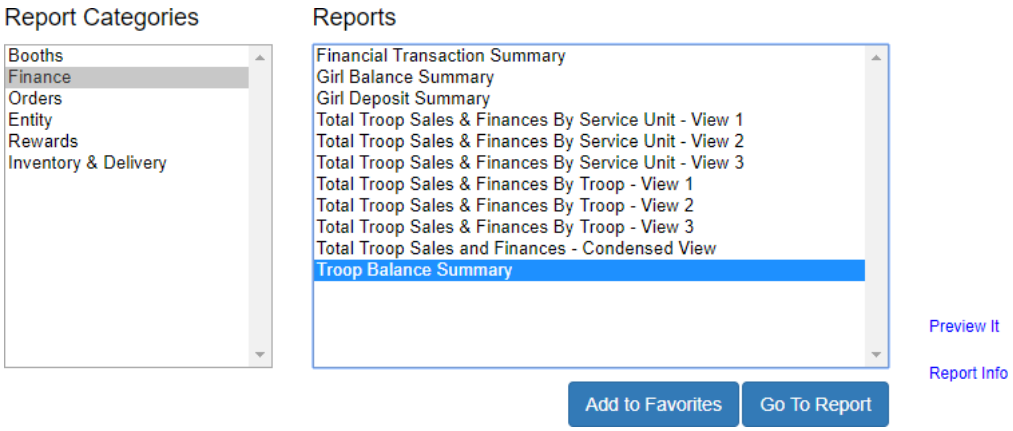
Reports

Current

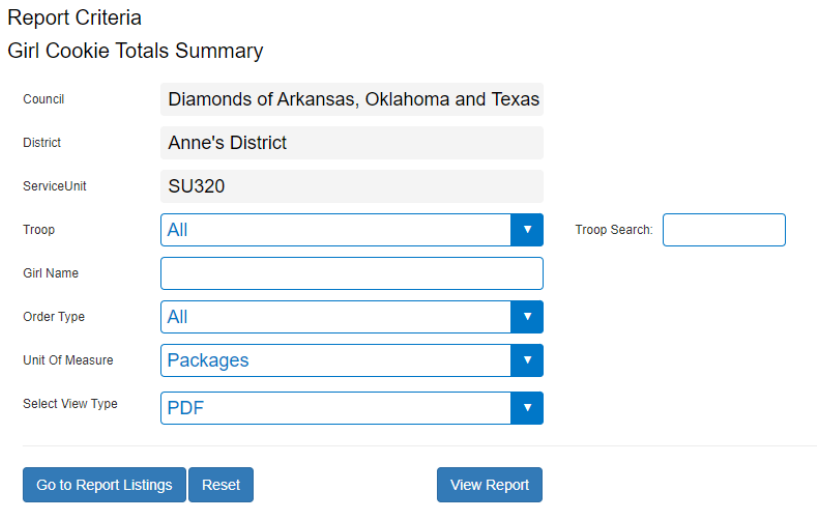
Archive

Users have two options under reports. Current reports displaying information for the current sales year. Archive reports are available for the previous 3 seasons. You will be prompted to select the year if you choose Archive Reports. 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



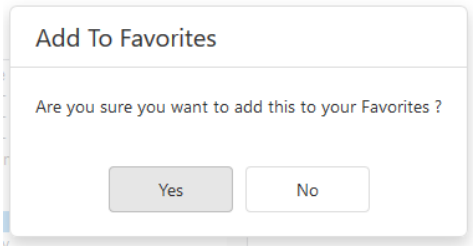
- Click "Go to Report" button



- District (if applicable) and SU will appear in all report filters. Additional filters are available for all reports.
- Recommend for most SU level users to view reports in units of measure as packages and in PDF. Some reports (mostly export) will open in Excel.
- Click "View Report" to see the report, "Go to Report Listings" to go back to previous page, or "Reset" to set the filters to their default values

Setting Favorite Reports

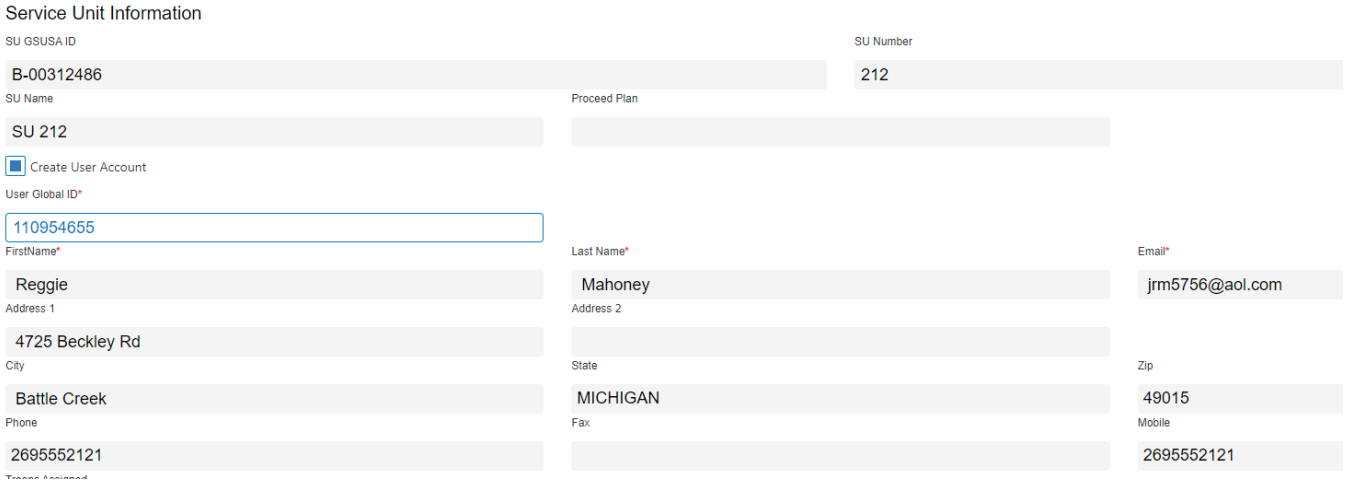
- Select the report category
- Select the report
- Click the "Add to Favorites" button
- Click Yes to Add to Favorites. Up to 10 reports can be added for quick access



My Service Unit

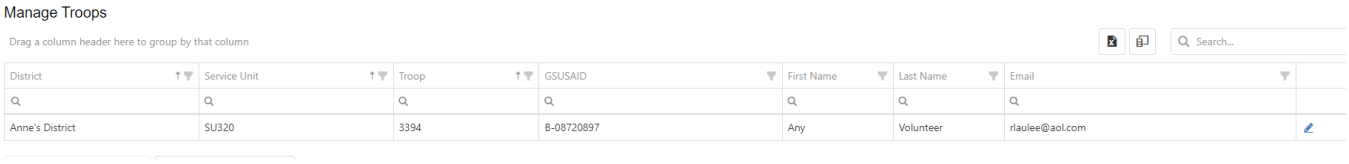
Service Unit Info

This information was uploaded by your council. Contact your council as instructed to update any information that is greyed out.



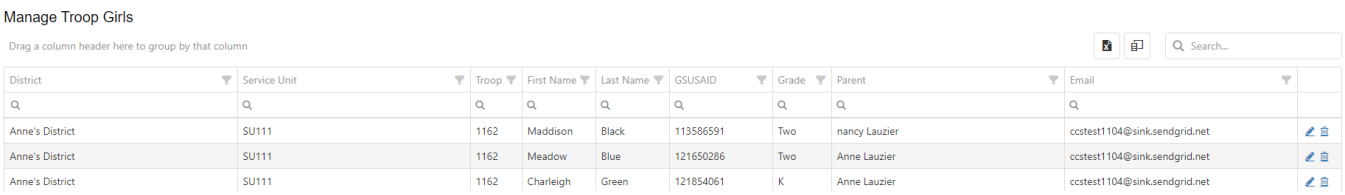
Troops

Listing of all troops in your service unit. Service Units may not edit troop information. Contact your council with any concerns on troops on the list or information on the troop page.



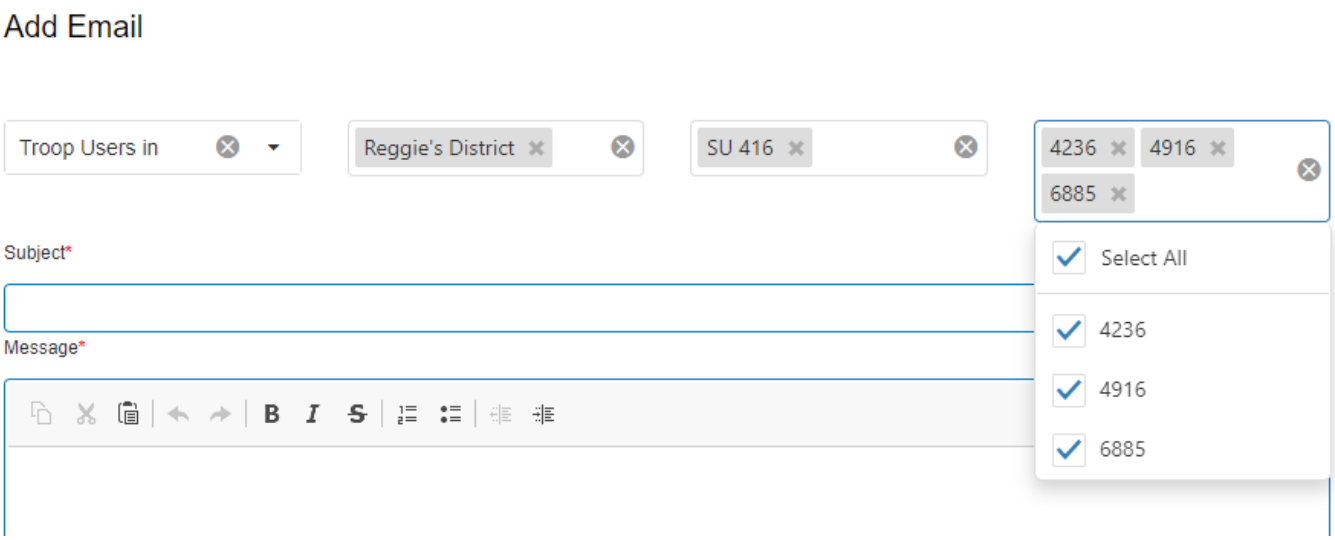
Girls

This page gives you a complete list of all the Girl Scouts in your Service Unit. Girl Information is uploaded by the council. Only apparel sizes can be edited. Contact your council to correct any errors.



Emails

Emails will generate and email that will go to a user's external email account. Manage Email grid will display emails created by you and sent to your troops. Follow the directions add a new email.

To add a new email

- Click Email
- Click Add New Email
- Select recipients – troop users>district>Service Unit>Troops(s)
- Enter subject and body of message
- Click Send or Save to send later