

Central Illinois – Smart Cookies instructions for Volunteers



Smart Cookies is the state of the art cookie sale platform for managing all of your cookie sale related activities. From ordering cookies to managing your booth sale activities and reward orders, you will find Smart Cookies to be user friendly on any size device from laptops to smartphones. All Smart Cookies functionality is fully accessible and easy to read on any size device making it the perfect partner for managing your cookie sale on the go! For step by step training videos, please visit ABC Bakers You Tube channel at <https://www.youtube.com/user/ABCCouncils> You can also access ABC Bakers YouTube channel from your Smart Cookies account by clicking on the Resources tab.

Website Address: <https://abcsmartcookies.com> Please note: The Smart Cookies Mobile App (available for IOS and Android devices) is designed for girls, however girls can also have the same user experience if they prefer not to download the app by accessing Smart Cookies through their devices web-browser.

From the login page of Smart Cookies you will have access to Tips & Tools, Resources and Cookie information so that you can get a head start on preparing your cookie season strategy, even before you have a user account created in Smart Cookies.

Creating your Smart Cookies account:

You will receive an email invitation to create a Smart Cookies account from GSCI. You will need to use a valid email address for your login; you will create your own password. Follow the instructions in the registration email, click on the link, complete your registration information then click save and you will see an account confirmation pop up. You will also receive an email confirmation that your account has been created. You are ready to access Smart Cookies!

Note: More than five incorrect attempts to access Smart Cookies will result in your account being locked for 30 minutes. You must wait the 30 minutes before attempting access again. There is a 'Forgot username or password?' link on the login page should you need to reset your system access.

Dashboard:

When you login to Smart Cookies, the first thing you will see is the Troop Dashboard. The Dashboard shows you many important data points, a calendar of events, messages, a financial summary and sales and inventory information for the girls in your Troop. Be sure to take some time and explore the dashboard features and familiarize yourself with all of the useful information available to you. There are some other helpful features accessible from the dashboard. Click on the icon next to your system user name in the top left corner of the dashboard:

- Mimic a user – allows you to view Smart Cookies as another system user in your Troop (another Troop volunteer or any Girl in your Troop that has created a Smart Cookies account). After accessing Mimic User, click on the user account you wish to mimic, then click 'mimic user'. You will be able to see the screens as they see them, which is helpful for training as well as monitoring the sales activity of your Troop girls. Any changes to orders that you make while in mimic mode will be trackable to your user account.
- Edit Profile – allows you to change your email address, password, address and phone information

Helpful Hints:

Navigate through Smart Cookies by clicking on the menu items across the top of the page.

Maps throughout the Smart Cookies platform are interactive and can provide driving directions

Smart Cookies creates an audit trail on all order types that identifies the date and time that changes are made as well as showing the name of the system user that made the change

My Troop:

Features on the My Troop menu include:

- Goals and Online activities – record and track your Troop Goals as well as monitor and confirm the goals set by the girls in your Troop
- Troop Roster – Council will upload all registered girls in Smart Cookies and send their email invitations to create their own accounts. The Girl Scout must be registered and have a working email on file to participate in the online cookie program.
- Troop information – select your reward plan and view your contact information
- Troop user information – allows you to view and manage the accounts associated with your Troop
- Troop Messages – post a message for your Troop Girls
- Set Tasks and Important Dates

Orders:

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

Booth:

- Schedule Booths
- My Reservations
- Troop Secured Booths
- Take Booth Credit Card Payment
- View Booth Credit Card Payments

Rewards:

- Manage Recognition Orders
- Recognition Order

Finances:

- Financial Transactions

Reports:

- Current and 1 year of archive sales data

Cookies, Tips & Tools, Resources

Help – ABC Bakers technical support team is available 24/7 to answer any Smart Cookies related questions. Contact abctech@westonfoods.com or call 800-853-3730

Initial Order Entry – Order menu

1. Select Troop Initial Order
2. Click on each Girl's name and enter the order for each girl in packages (not cases)
3. You can add additional packages to be delivered with your initial order under the booth entry
4. Smart Cookies will round each variety up to the nearest full case quantity
5. Click save
6. Your initial order delivery location option(s) will appear
7. Select your delivery station
8. Select a date and time for pickup if applicable
9. Click save. Your order will be captured. If complete, click on ready for review. You may turn the review option off any time prior to the Troop entry deadline and make changes to your order if necessary.
10. Placing the order in 'review' status is not mandatory in order for it to be finalized by the Council

Placing a Cupboard Order (Planned order) – Order Menu

1. Select Planned Order
2. Your local cupboard locations for pick up will be displayed
3. Select the cupboard you wish to pick up from
4. Select the day you wish to pick up
5. Select the time you prefer to pick up
6. Enter the number of each variety you want to pick up
7. Click save
8. Print a copy for your records

Transferring packages to Girls – Order Menu

Select Transfer Order

Select the type of Transfer you wish to enter from the dropdown menu

For a Troop to Girl transfer (T2G) your Troop will be the default in the 'from' section

Select the girl to transfer to and click apply

Enter the packages you wish to transfer by variety in the packages column

Press save

The packages will be removed from Troop inventory and credited to the girl along with financial responsibility for those packages

Note: Troop to Troop (T2T), Girl to Troop (G2T) and Girl to Girl (G2G) transfers are also created in similar fashion. Select the type of transfer, follow the prompts for the additional information needed based on the transfer you are creating.

Placing an Operation Cookie Share Sales order – Order Menu

1. Select Virtual Cookie Share
2. Enter the number of cookie share packages sold by each girl
3. Click Save, repeat as needed for additional Cookie Share donations throughout the sale
4. The girl is financially responsible for these sales

Manage Orders Screen – Order Menu

The Manage Orders screen allows you to view all order data, or selected order data via filters

Select all order types by clicking all, or select specific order types – Click apply filters

Select specific order data by using the 'Refine Search' filter to look for orders for a specific girl

You may export the data on your Manage Orders grid by clicking on the 'Export to Excel' button on the bottom right of the Manage Orders grid.

Note: girl only level orders (orders that do not impact Troop inventory) will not appear on the Manage Orders grid unless the refine search filter is used to select the girl whose orders you wish to see (i.e.: Girl to Girl transfers(G2G), Girl direct ship orders(DIRECT SHIP))

Recording payments from Girls/Parents – Finance Menu

1. Select Financial Transactions
2. Click on the Girl Transactions Tab
3. Click on Add Girl Transaction
4. Select the girl, transaction type and complete the information
5. Click Save

Note: Financial transactions for credit card payments will be automatically credited in Smart Cookies to both the girl that made the sale and her Troop- the funds are deposited into a Council bank account. The financial reports for Troops and Girls will automatically update to show all payments made. Credit for packages sold via girl delivery would be given either via the packages ordered on the Girl's initial order or through transfers of additional packages from the Troop to the girl.

Direct Ship Sales (online – shipped and donated)

Online sales via Smart Cookies Direct Ship are shipped to a customer directly from the bakery and/or are recorded as a Cookie Share donation per the customer's choice. These orders will be paid by credit card and will automatically be entered as a sale in the Girl and Troop accounts. Payment will also be credited for the sale. No additional entry will be needed.

Booth Sales

Some stores and malls prefer GSCI to handle the booth sale scheduling. Those locations, dates and times are populated on the booth scheduler in Smart Cookies by the Council. On January 15, 2021 (9AM) scheduler opens for troops to reserve two booths sales. On January 18, 2021 (9AM) the scheduler is opened for troops to schedule additional booth locations.

Booth sales booked by Troops via Smart Cookies will be available for consumers to find via the GSUSA Cookie Locator. When customers access the Cookie Locator and enter their zip code, the customer then has access to booth sale locations, dates and hours of operation. The map feature can provide driving directions to the booth location. Booths booked by Troops in Smart Cookies can also be shared via social media links

Booth Sale selection process – Booth Menu

Select Schedule Booths

1. Use the filters to search or select a specific date, time or zip code location if desired
2. Select the location
3. Select an available date
4. Select an available time slot
5. Booths selected will be displayed under 'My reservations'
6. To remove your Troop from a booked timeslot, click the menu at the end of the row
7. Click on 'remove reservation'
8. The booth will be released and removed from the GSUSA cookie locator until it is booked by another Troop

Troop Secure Booth Sales

1. Hoover over Booth Tab and choose Troop Secured Booth Sales
2. Enter all required fields
3. Click Save

Sharing Booth Sales via Social Media – Booth Menu

1. Select My Reservations
2. Select the Facebook or Twitter icon above the reservation grid
3. After clicking the icon, follow the prompts to post your booth sales to the social media site
4. Consumers will see your upcoming booth locations, dates and times
5. Interactive maps can provide driving directions
6. The other icon available that looks like a chain is a copy link. You may click this icon and then right click and paste the link in an email, other social media post or text message to share the link with information about your upcoming booth sales

Accepting Credit Card Payments at Booth Sales – Booth Menu

1. Select Take a Booth Credit Card Payment
2. Select the booth location
3. Enter the order
4. Email address entry is optional for receipt
5. Select the payment option
6. Enter the credit card information (or use the scan feature on an iPhone via Safari access)
7. Select 'View Booth Sale Credit Card Payments to see all credit card payments accepted at booth sales

Giving Booth Sale Credit to Girls – Booth Menu

1. Select My Reservations
2. Select the booth you wish to credit by clicking the menu at the end of the row
3. Select Smart Booth Divider
4. Enter the packages sold at the booth by variety
5. Click Save to distribute at a later time, click Save and distribute to credit girls for booth sales
6. Select the girls that participated in the booth sale
7. Click save, Smart Cookies will divide the sales as evenly as possible among the participating girls
8. Varieties highlighted in red indicate they need attention to complete the distribution
9. Adjust packages among girls as needed by updating the numbers being credited
10. Click save. Smart Cookies will create a transaction giving the girl credit for the sales, but not the financial responsibility for those booth packages sold

How to Manually Give Girls Credit for Booth Sales

1. Hover over the Orders tab and click Transfer Order
2. Click on the white line
3. Under Girl, click on the girls name (field will turn blue)
4. Click Apply
5. Enter the quantities, by variety, you wish to transfer under BOOTHS PACKAGES
6. Click Save

Reward Orders – Rewards Menu

1. *Select Recognition order to create a new order*
2. Select the order type (**Main**)
3. Girls will be displayed in alphabetical order by first name. Those girls that need selections made or sizes added will be displayed first and will show a warning symbol indicating the order needs to be updated in order to be completed
4. Click the arrow at the end of the row to open the order. Any sales levels achieved that require additional information (choice or size) will show the warning symbol.
5. Make the required selection or add the size if needed
6. Click Save, then click the recognition order button with the left arrow above the grid to return to the order and review the remaining girls
7. Review each girl as needed and click save after any changes
8. Once all items have been selected and any required sizes added, your order will show as 'complete' on the manage recognition orders grid

Reports

1. Reports are categorized by functionality
2. Select the report category to see the list of reports available. Report data structure can be previewed if desired by selecting the report name, then clicking 'preview it'. Clicking Report info provides a description of the data contained in the report.
3. Click 'Go To Report' to run the report
4. Apply any filters if desired
5. Select the view type (HTML, Text/Excel, PDF)
6. Click View Report

Credit Card Payments Smart Cookies: For individual girl orders and troops selling at cookie booths. Any girl or troop who has access to Smart cookies can accept credit card providing they have a smart phone or laptop

Credit Card Payments for Girl Delivered Orders

Customers can select to order cookies online but have the girl deliver them instead of pay for shipping. Since customers will have the option to pay via credit card OR pay at time of delivery, girls may still need to collect payment at time of delivery. Cookies must be marked *delivered* in order to be able to enter payment information into Smart Cookies. To collect a credit card payment:

1. Girls sign into Smart Cookies-app or desktop
2. Navigate to My Orders
3. Select *Order* in the Total Girl Delivery Order section to view orders
4. Update the order if any changes are required
5. Enter the customer's credit card information and double check card information OR if using an iPhone Simply scan the credit card. The image does NOT save to the girl's iPhone (not android devices).
Pro tip: This iPhone feature works when using Safari browser only, as opposed to logging into the app.

Credit Card Payments for In-Person Orders

Girls can take credit card payments for cookies as they are selling in-person. Cookies must be marked *delivered* in order to be able to enter the payment information into Smart Cookies. To collect credit card payment:

1. Girls log into Smart Cookies-app or desktop
2. Navigate to My Orders
3. Enter customers contact information
4. Enter the customer's order by variety, in packages
5. Click *Delivered* and *Yes* under the *Paid* section. By choosing *Paid* this opens up the payment option screen
6. Enter the customer's credit card information OR if using an iPhone (not android devices) simply scan the credit card. The image does NOT save to the girl's iPhone
Pro tip: This iPhone feature works when using Safari browser only, as opposed to logging into the app.

Credit Card Payment for Booth Sale

Girls and troop can accept credit card payments at booth sales using a mobile device or through a computer. While both girls and troops can take payments, only the troop will be credited with the booth financial transaction and girls will still need to be credited for packages sold at the booth sale in Smart Cookies. Only booths that have been approved in Cookies will be eligible for this payment option. For the troop to accept credit cards through Smart cookies at least one adult at the booth must have access to the troop in Smart Cookies.

1. Girls sign in Smart Cookies –app or desktop
 2. Using the menu option on Troop and Girl Dashboards, select the *Booth* tab and select *Take Booth Credit Card Payment* from the drop down.
 3. Troop Assigned booths will for that day appear. Select the correct booth from the list by checking the correct choice and the click *Apply*
 4. On the *Order* page enter the customer's order by variety, in packages. As an option feature, the customer can Provide an email for a receipt. Click *Next*
 5. Enter the customer's credit card information-if you receive an error message, double check that all information was entered correctly.
 6. Payments will automatically post to Smart Cookies. Credits to girls and troop automatically post in Smart Cookies.
- Pro Tip: The iPhone feature works when using Safari browser only, as opposed to logging into the app.

Viewing Data for Booth Orders

1. The troops is credited with the full credit card payment collected
2. Sales are captured in the bank name *Booth Payment Credit Card* and have a unique reference number.
3. *Financial Transactions* are visible in the *Order*, *Girl Balance Summary* report and *Troop Balance Summary* report
You can also view all credit card transactions accepted at booths, under the *Booth* tab to view the following Information: Transaction Number; customer email; packages sold and the amount; booth details and transaction timestamp.
4. There is also an option to resend the email receipt.