



# Smart Cookies Instructions

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 YouTube channel at [YouTube.com/user/ABCCouncils](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: [ABCSmartCookies.com](https://www.ABCSmartCookies.com)

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 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. 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.



### 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 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

1. Select Transfer Order.
2. Select the type of Transfer you wish to enter from the dropdown menu.
3. For a Troop to Girl transfer (T2G) your Troop will be the default in the 'from' section.
4. Select the girl to transfer to and click apply.
5. Enter the packages you wish to transfer by variety in the packages column.
6. Press save.
7. 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.*

### 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 2, 2024 (9AM) the booth scheduler opens for troops to reserve two booths sales. On January 5, 2024 (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.



### **Adding a Troop Secured Booth Sale**

1. Hover 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.

### **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.

### 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, including 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.





# ABC Bakers YouTube Channel Resources

## Girl Scout Resources

ABC Smart Cookies Demo:

- Girl Registration for Smart Cookies Online Sales

A Guide through the Girl Dashboard:

- Managing Girl Contacts for Ecard Invites Contacts
- Selling Cookies online-Girls Sending Ecard invites
- Selling Cookies online-Girl Tools, Video and Individual Girl URL links

## Troop Volunteer Videos

- Volunteer Smart Cookies Registration
- Troop Initial Cookie Order
- Troop Secured Booth Request
- Scheduling a First Come First Served Booth
- Smart Booth Divider-Distributing cookie for each booth
- Smart Booth Divider-Distributing all Booth Cookies at the End of the sale
- Smart Booth Divider-Editing or Deleting a Transaction
- Entering a Planner Order
- Entering a Troop to Girl Transfer
- Entering a Operation Cookie Share Order
- Documenting Financial Transactions
- Managing Orders
- Smart Cookies Reports
- Creating Troop Reward Orders
- Accepting Credit Card Payments
- Girl Booth Credit Card Payments
- Credit Card Payment for Girl Delivery or Booth Sale Events

