



# Smart Cookies Manual for Volunteers

[abcsmartcookies.com](http://abcsmartcookies.com)

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These step by step directions are provided to help you navigate Smart Cookies. Please note that the Smart Cookies platform may be updated or enhanced to improve the system, so any updated directions will be available on The Bridge.

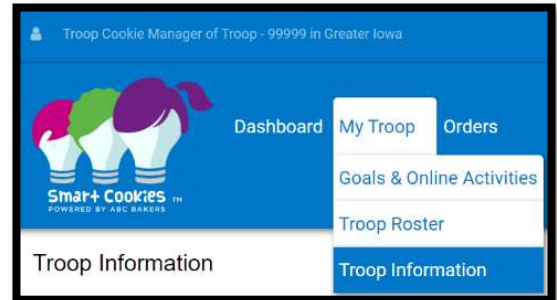
# Troop Set Up and Managing Girls

## Troop Set Up

You will receive your email invitation from [noreply@abcsmartcookies.com](mailto:noreply@abcsmartcookies.com). Follow the link inside to complete your Volunteer Profile. After this is complete, you will receive a registration confirmation email and can then log into Smart Cookies.

Review and edit your troop information as necessary:

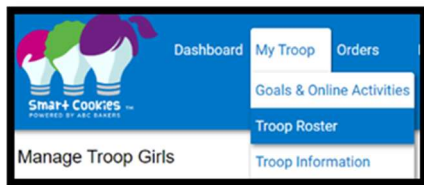
- Hover over the *My Troop* tab at the top of the screen, click *Troop Information*.
- **Level** – This shows the Girl Scout program level for your troop (Daisy, Brownie, etc). If your troop includes multiple levels, choose “Group.”
- **Proceed Plan** – for full details on Troop Proceeds and Rewards Plans, see page 27. The system will default to the Main Proceed Plan. The only reason you would select the CSA Opt-Out Proceed Plan is if your Cadette, Senior, or Ambassador troop (grades 6-12) decides together to opt-out of ALL rewards items/ bonus Cookie Dough in order to earn additional proceeds. If you have a CSA troop and are not sure about the group’s decision, don’t worry! You can always change the proceed plan before the end of the program.
- **Reward Plan** – You will select a reward plan for ALL girls in the troop, based on their preference for rewards items and/or bonus Cookie Dough or to opt-out of all cumulative rewards and Cookie Dough to receive either the tech or experience reward item. The system will default to the Main Reward Plan. The only reason you would select the Tech or Experience Non-Cumulative Opt-Out Reward Plan is if all the girls in your troop are choosing to opt-out of all cumulative rewards and Cookie Dough. You can adjust this for each individual girl if not all the girls in your troop want to select the same Reward Plan option, this is required at the troop level. See page 28 for directions on how to adjust this by individual girl.
- **Bank Account and Bank Routing** - *Troops are required to have this information in the system before they can order cookies.*
- Click *Update Information*.



## Managing Girls

Girl Scouts of Greater Iowa automatically adds all registered girls directly into Smart Cookies. If you notice a girl is not in Smart Cookies, chances are she is not registered for the current membership year. If you are missing a girl in Smart Cookies, please email [info@gsiowa.org](mailto:info@gsiowa.org). Please allow at least 24-48 hours for us to verify her registration and add her to the system.

Volunteers do not have access to add or delete girls, or to edit a girl's name or member ID in Smart Cookies. However, you can make reward selections, edit her grade level, and enter her t-shirt size. To view the list of girls uploaded in your troop in Smart Cookies hover over the *My Troop* tab and click *Troop Roster*.



Click on the blue pencil to the far right of the girl's name to verify and update information as needed:



Manage Troop Girls									
Drag a column header here to group by that column									
District	Service Unit	Troop	First Name	Last Name	GSUSAID	Grade	Parent	Email	
DM Metro	Des Moines	99999	Sam	Digmann		Five			

- **Grade Level** – shows grade level of individual girls
- **Shirt Size** - Please enter each girl's t-shirt size in the event she reaches the appropriate package level and earns a t-shirt or sweatshirt. This is the size that will be ordered for her, unless a different selection is entered when placing the Recognition Order. NOTE: Troop Product Managers do have the option to select different sizes for t-shirts and hoodies, as part of the rewards selection process. Girls can select just one size under her Girl Profile.
- **Reward Plan** - for full details on Troop Proceeds and Rewards Plans, see page 27
  - The system will default to Main Reward Plan for each girl unless you change the Reward Plan at the troop level. The Main Reward Plan includes the standard items shown on the *Troop* or *Juliette Reward Panel*.
  - If a girl sells 1000+ packages and chooses any of the opt-out rewards, change her rewards plan to the Tech or Experience Non-Cumulative Opt-Out Reward Plan. This change can be made any time before the end of the program!

- **Parent/Guardian Information** – The system will show the primary contact (parent/guardian) for each girl, including their name and email address. You may choose to add additional details, such as phone number, if you'd like to have all the information stored in the same place. Please note: updating information here will not change the information on file with Girl Scouts of Greater Iowa. Please contact us at [info@gsiowa.org](mailto:info@gsiowa.org) for contact information updates.

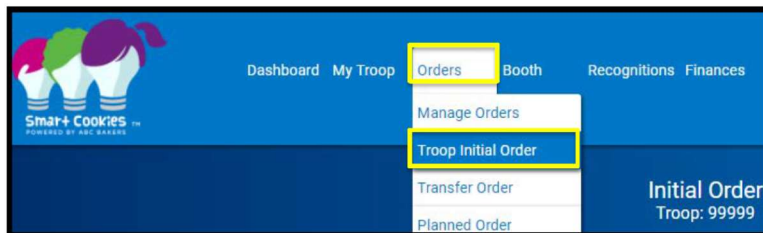
- Click Save.

## Ordering Cookies

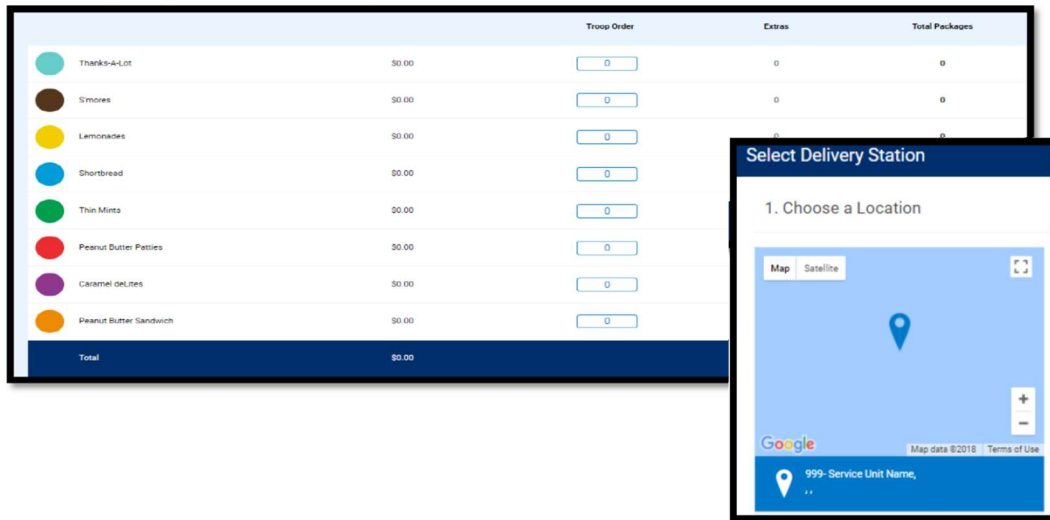
### Troop Initial Order - in CASES

When placing your Troop Initial Order in Smart Cookies, you will be ordering in CASES (12 packages = 1 case).

1. To place your Troop Initial Order, go to the *Orders* tab, and select *Troop Initial Order* from the dropdown.



2. Enter your quantities in CASES by variety and click *Save*.



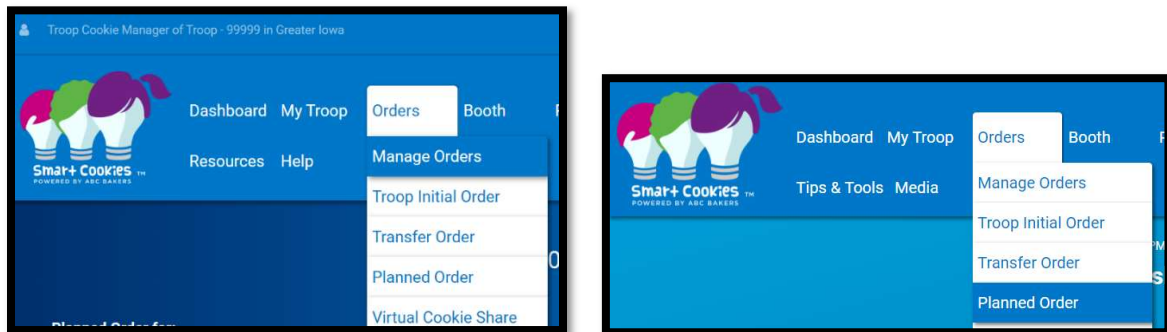
3. Select your *Delivery Station* (you may only have one) and click *Save*.

For suggestions of how many of each variety to order in your Troop Initial Order please use the *Troop Initial Order Estimator Tool* on The Bridge!

## Planned Orders – in PACKAGES

The Planned Order process is how you receive more cookies from a local Cookie Cupboard. To guarantee product each week, all troops and Juliettes are required to enter a Planned Order in Smart Cookies.

1. To place a Planned Order, go to the *Orders* tab, and select *Planned Order* from the dropdown.



2. Select the desired Cupboard from the list shown on the left side of the screen and click *Continue*.

3. Select the desired pick up date and click *Continue*.

- Select the desired pick up time and click *Save*.

The screenshot shows a three-column interface for selecting pickup details. The first column, titled 'Pick up from: CUPBOARD', lists two locations: 'SuperCupboard- DesMoines' at 10400 Hickman Rd Ste 12, City Unavailable, IA 50325, and 'Rolling-Carroll at HyVee' at 905 US Highway 30 W, Carroll, IA 51401. The second column, titled 'DATE', shows a calendar for February with dates Tue 13, Wed 14, and Thu 15. The third column, titled 'TIME', shows a grid of time slots from 8:00 AM to 6:00 PM. A 'Save' button is located at the bottom right of the time selection area. 'Continue' buttons are present at the bottom of each column.

- Enter your quantities in **PACKAGES** by variety and click *Save*.
- You will receive a notification at the bottom the screen that your order was successfully submitted.
- You may enter in any notes as you see fit in the *Order Notes* field as well as print a receipt, if you would like.

The screenshot shows the order confirmation screen. At the top, the total amount is \$48.00. Below this is an 'Order Notes' section with a text input field containing 'For Booth This Weekend'. There is a 'Print Receipt' button with a printer icon and a 'Save' button. At the bottom, a green checkmark icon is next to the message: 'Planned order 0000003 has been successfully saved.'

- To review your Planned Orders, go to the *Orders* tab, and select *Manage Orders*. (You can narrow down the search parameter to only show Planned Orders.)

The screenshot shows the 'Orders' management interface. At the top, there is a 'Clear all filters' link. Below it is a horizontal menu of filter options: ALL, INITIAL ORDER, PLANNED (selected), RESTOCK, TRANSFER, DAMAGED, COOKIE SHARE, and DIRECT SHIP. A 'REFINE SEARCH' dropdown is located below the filter menu. At the bottom, there is a blue button labeled 'Apply Search Parameters'.

Once your order has been picked up, the Cookie Cupboard Manager will approve your order. It may take up to 48 hours for your order to show as approved in Smart Cookies. If you do not see it after 48 hours, please contact us at [info@gsiowa.org](mailto:info@gsiowa.org).

The Planned Order becomes a *Cupboard to Troop Transfer*, which you will be able to view on your *Manage Orders* page.

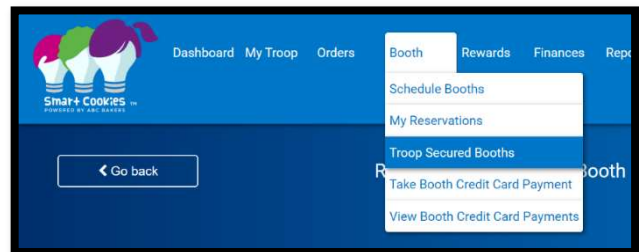
Once the order is approved, the packages will then be available for you to transfer to girls. Do not transfer packages from your Planned Order to girls in your troop before you have picked up your order.

## Booth Sales

### Troop-Secured Booth Sale Locations

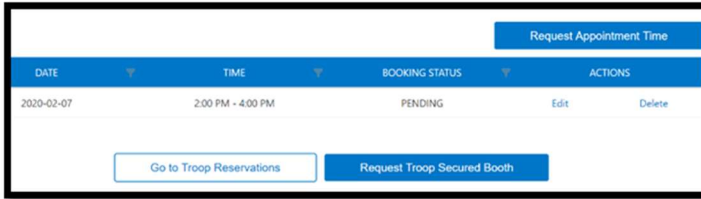
The benefit to entering your booth sale in Smart Cookies is that it will be entered in to the “Find Cookies!” tool on [girlscoutsiowa.org](http://girlscoutsiowa.org), on [girlscoutcookies.org](http://girlscoutcookies.org), and listed in the Girl Scout Cookie Finder App. This is also the only way your troop can receive their sample package credit used during your booth times. Customers will be able to find your booth sale by typing in their zip code.

1. To schedule a booth, go to the *Booth* tab, and select *Troop Secured Booths* from the drop down.
2. Enter the *Booth Information*. The troop contact information should be the volunteer who set up the booth.

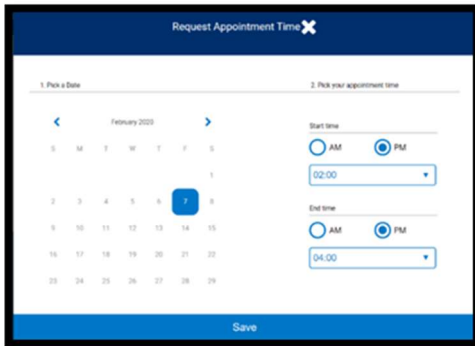
A screenshot of the 'Booth Information' form. The form is titled 'Booth Information' and has a section for 'Address'. It contains several input fields: 'Store Name', 'Location information (Optional)', 'Booth Location Address', 'Suite/Apt. #', 'City', 'State' (a dropdown menu), and 'Zip Code'. There is a blue 'Save' button at the bottom right of the form.

3. Click *Save* after entering in the booth location and contact information.

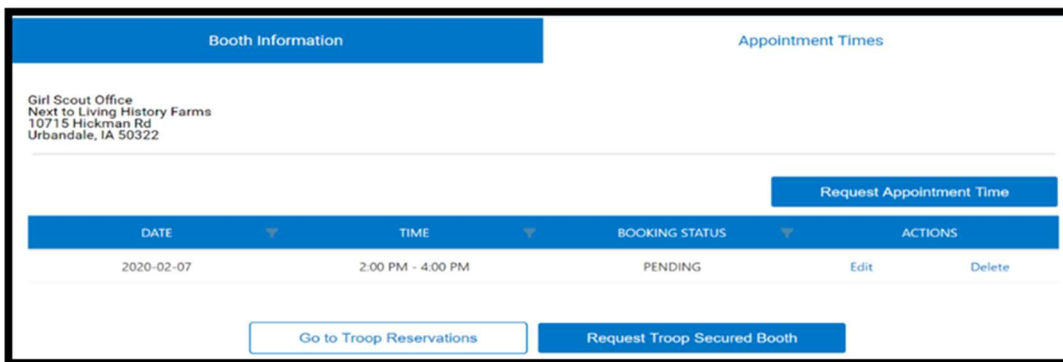
- You will be redirected to the *Appointment Times* tab where you will request appointment times by selecting *Request Appointment Time*.



- Enter the *Date*, *Start Time*, and *End Time*, and click *Save*.



- You **MUST** click *Request Troop Secured Booth* to finish the process or location won't save. Once requested, you'll receive a notification on the bottom of the screen that says, "Successfully requested troop secured booth."
- Your request will be sent to Girl Scouts of Greater Iowa for approval. The booth location will say "pending" until the location has been approved.

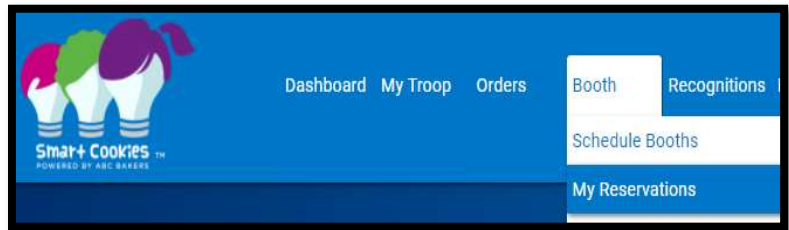


- Once the request is approved, a confirmation email from [noreply@abcsmartcookies.com](mailto:noreply@abcsmartcookies.com) will be sent to the email address provided under the troop contact listed for the booth. *Please note: it may take up to a week for your booth sale to be approved.*
- To review your requested booths, go to the *Booth* tab and then *My Reservations*.

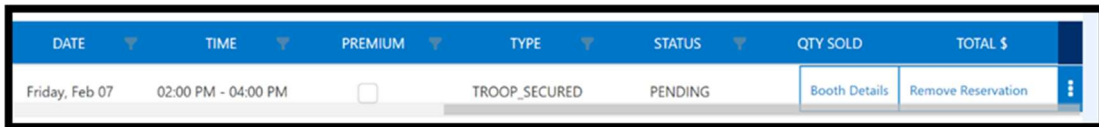
## Adding Additional Times to Booth Locations Already Entered in Smart Cookies

If you have already entered in a troop-secured booth location in Smart Cookies but need to add more time slots you will need to add those times to your existing location. If you try entering in the booth information in again, you will get an error message that says ‘*The booth address has already been requested by your troop.*’

1. To add more time slots to a troop-secured booth location already in the system, go to the *Booth* tab, and select *My Reservations* from the drop down.

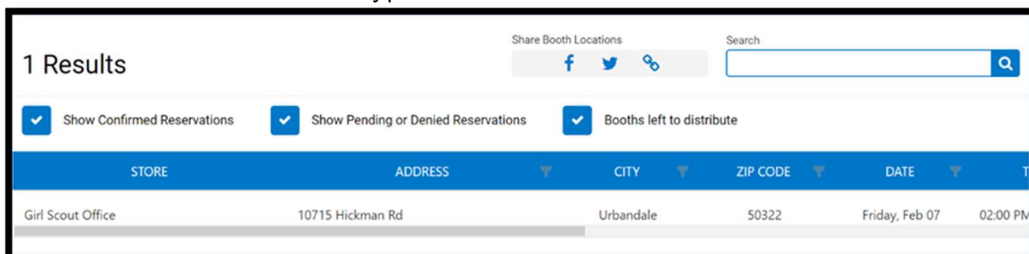


2. Use the *Search* feature to find the desired booth request or scroll through the list shown.



DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
Friday, Feb 07	02:00 PM - 04:00 PM	<input type="checkbox"/>	TROOP_SECURED	PENDING	Booth Details	Remove Reservation

3. Scroll to the right using the scroll bar under the list of booths to see additional information such as booth type and status.



1 Results

Share Booth Locations: [f](#) [t](#) [l](#)

Search:

Show Confirmed Reservations  Show Pending or Denied Reservations  Booths left to distribute

STORE	ADDRESS	CITY	ZIP CODE	DATE	TIME
Girl Scout Office	10715 Hickman Rd	Urbandale	50322	Friday, Feb 07	02:00 PM

4. Click the three vertical dots to the far right to and click *Booth Details*.
5. Click on the *Appointment Times* tab and then *Request Appointment Time*.
6. Enter the *Date*, *Start Time*, and *End Time*, and click *Save*.
7. You MUST click *Request Troop Secured Booth* to finish the process or the newly added date and time won't save. Once requested, you'll receive a notification on the bottom of the screen that says, "Successfully requested troop secured booth."

## Premium and Non-Premium Council-Secured Booths

To give all troops an equal chance to have a time slot at council-secured booths that are highly requested, we have made some locations *Premium*. These booths will be indicated with a 'P' to the right. *Premium* locations have additional restrictions on the number of time slots a troop can win in the lottery or pick up in First Come, First Serve (FCFS).



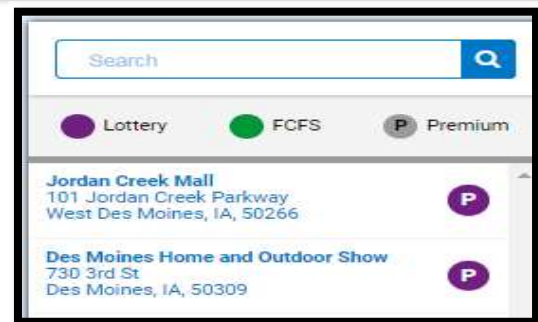
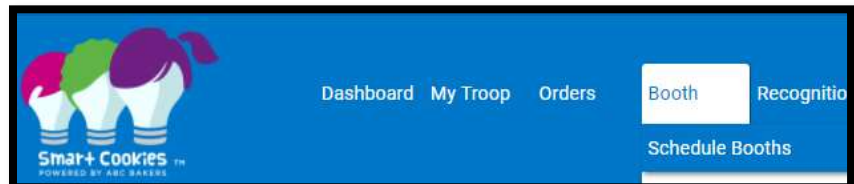
## Council-Secured Booth Sales – Booth Lottery

Girl Scouts of Greater Iowa sets up partnerships with high traffic areas each year to provide troops with access to more customers. The booth lottery is the randomized way that troops can sign up for time slots.

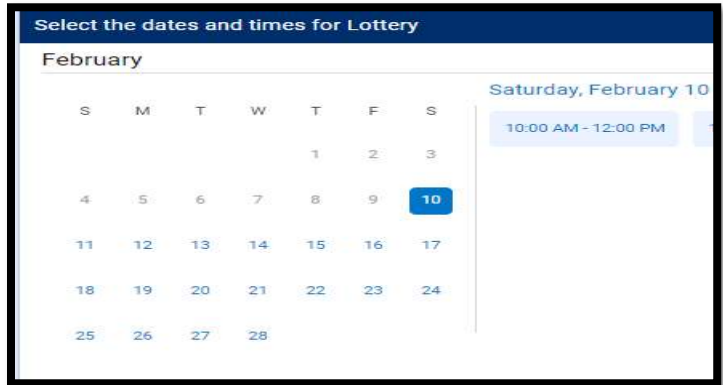
Each troop may enter five requests into the lottery. Troops may win up to three of their five requests. In some cases troops may not win any locations.

However, unassigned booths may still be signed up for using the *First Come, First Serve* process outlined later in this guide. For booth sales happening the first weekend of the program, you must plan to order cookies to stock this booth during your Troop Initial Order. You must place additional Planned Orders for cookies as needed. **You must bring cookies to all booths.**

1. To submit a booth lottery request, go to the *Booth* tab, and select *Schedule Booths* from the drop down.
2. Use the *Search* feature to find a booth location or scroll through the list shown on the left side of the screen.
3. Click on the desired booth location to bring up a calendar of available dates for that location (available dates are blue).
4. Select the desired date.
5. Select the desired time slot.



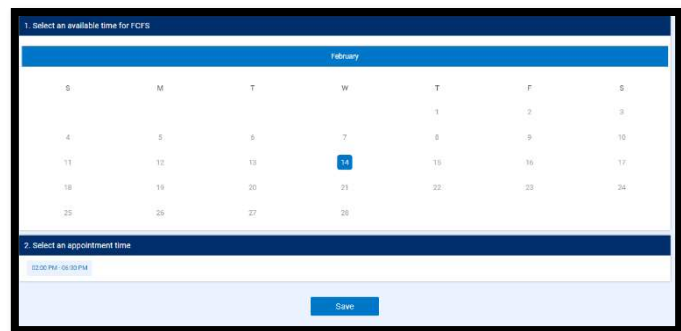
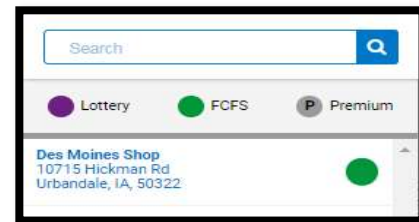
6. Click *Save*.
7. Troops will receive a confirmation email from [noreply@abcsmartcookies.com](mailto:noreply@abcsmartcookies.com) if they win any lottery booths on January 8. This email will be sent to the Troop Product Manager's email address.
8. To review your requested booths, go to the *Booth* tab and then *My Reservations*.
9. Repeat this process to request additional locations/dates/times.



### **First Come, First Serve (FCFS) – Left Over Council-Secured Booth Sales**

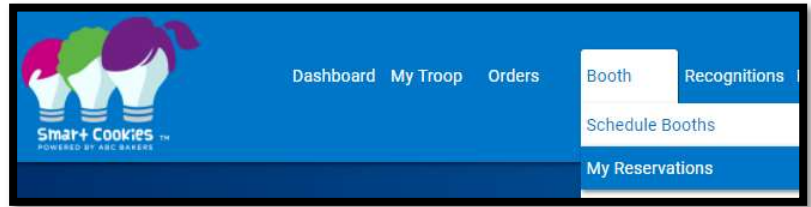
In the event a council-secured booth sale time slot is not assigned during the lottery, troops may select up to three additional booth sale slots on a first-come, first-served basis. More slots may be opened throughout the program.

1. To submit a FCFS request, go to the *Booth* tab, and select *Schedule Booths*.
2. Use the *Search* feature to find a booth location or scroll through the list shown on the left side of the screen.
3. Click on the desired booth location to bring up a calendar of available dates for that location (available dates are blue).
4. Select the desired date.
5. Select the desired time slot.
6. Click *Save*.
7. Troops will receive a confirmation email from [noreply@abcsmartcookies.com](mailto:noreply@abcsmartcookies.com) when the FCFS booth is accepted. This email will be sent to the Troop Product Manager's email address.
8. To review your requested booths, go to the *Booth* tab and then *My Reservations*.



## Reviewing Requested Lottery, FCFS and Troop-Secured Booths

1. To review your requested booth sales, go to the *Booth* tab and select *My Reservations*.
2. Use the *Search* feature to find the desired booth request or scroll through the list shown.
3. Scroll to the right using the scroll bar under the list of booths to see additional information such as booth type and status.
4. Click the three vertical dots to the far right to view booth details (to add additional timeslots and/or edit booth information), use the *Smart Booth Divider* or remove the reservation, as needed.



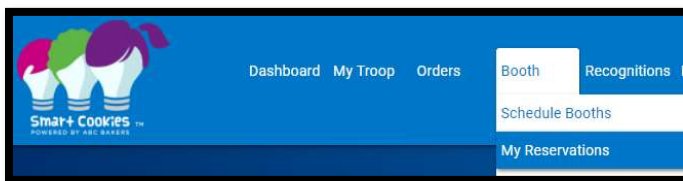
CITY	ZIP CODE	DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
West Des Moines	50266	Feb 09	05:00 PM - 08:00 PM	<input checked="" type="checkbox"/>	LOTTERY	RE		
West Des Moines	50266	Mar 09	05:00 PM - 08:00 PM	<input checked="" type="checkbox"/>	LOTTERY	REQUESTED	0	0

## Smart Booth Divider

### Smart Booth Divider

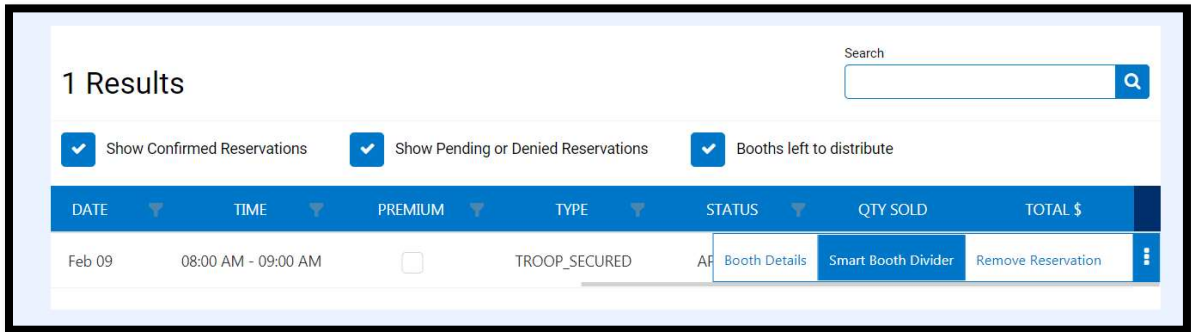
The *Smart Booth Divider* is a great way to give credit to girls who have sold during a booth.

1. To use the *Smart Booth Divider*, go to the *Booth* tab and select *My Reservations* from the drop down.

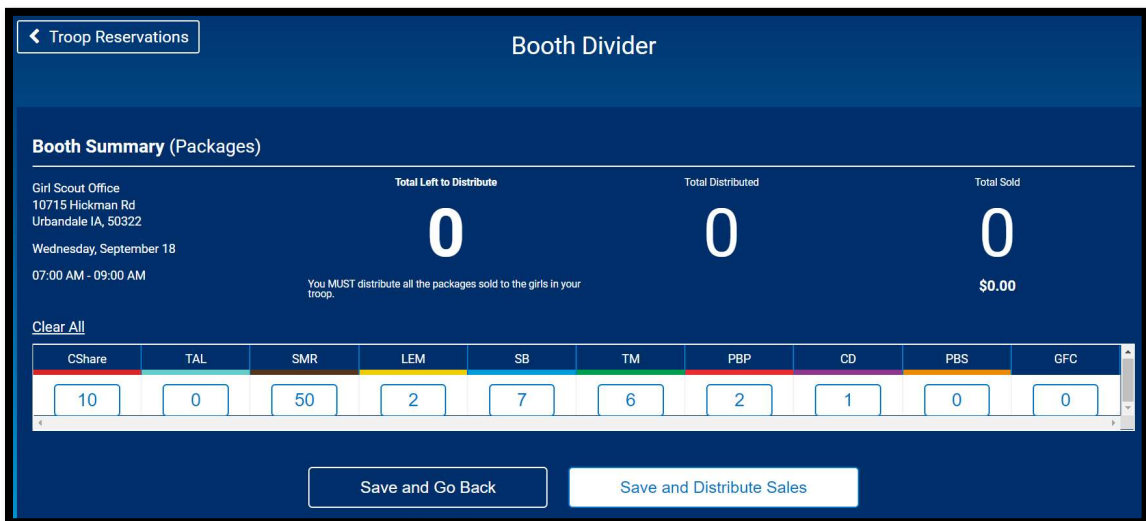


2. Use the *Search* feature to find the desired booth or scroll through the list shown.
3. Scroll to the right using the scroll bar under the list of booths.

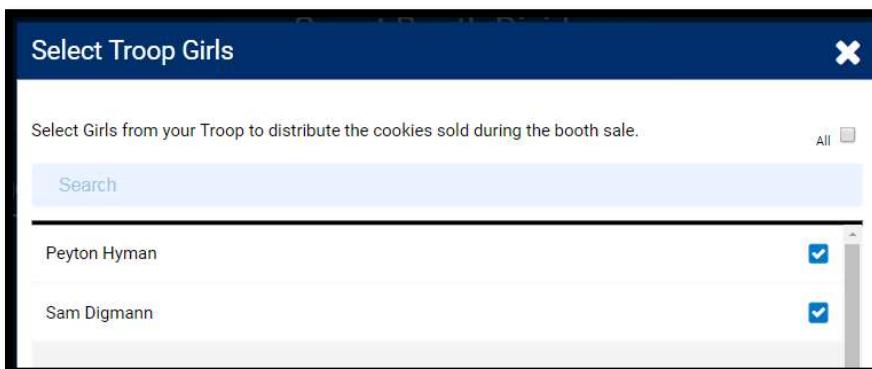
- Click the three vertical dots to the far right and select *Smart Booth Divider*.



- Enter the quantities in PACKAGES by variety that was sold during the booth.



- Click *Save and Distribute Sales*.  
**PRO TIP:** Use the *CShare* column to track donations collected at the booth that will go towards *Virtual Cookie Share*. Those packages will be credited to girls, but do not come from the troop's inventory.
- Select the girls who sold at the booth sale, click *Continue*.



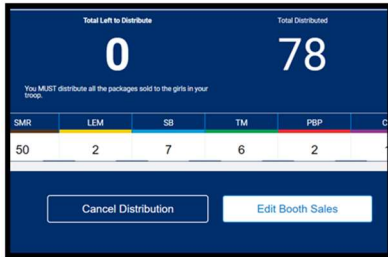
- The packages will automatically be divided evenly between all girls selected. If there are any varieties that were not able to be distributed evenly, they will be highlighted RED and you will choose which girl gets those extra packages. You may also edit any of the amounts for any of the girls.

GIRL_NAME	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	TRACKED CS	PACKAGES
Peyton Hyman	1	3	3	4	4	5	5	6	0	0	0	31
Sam Digmann	1	3	3	4	4	5	5	6	0	0	0	31
Packages left to Distribute	0	0	1	0	1	0	1	0	0	0	0	3
Troop Total	2	6	6	8	8	10	10	12	0	0	0	62

- Once the packages have been distributed as you see fit, click *Save*.

## Editing the Smart Booth Divider

- To edit the *Smart Booth Divider* after you have already completed the steps above, go to the *Booth* tab and select *My Reservations* from the drop down.
- Use the *Search* feature to find the desired booth request or scroll through the list shown.
- Scroll to the right using the scroll bar under the list of booths.
- Click the three vertical dots to the far right and select *Smart Booth Divider*.
- Make the necessary edits:
  - Click *Edit Booth Sales* if you need to edit the quantities sold during the booth.
  - Click *Edit Girls* if you need to add or remove girls who sold at the booth sale.



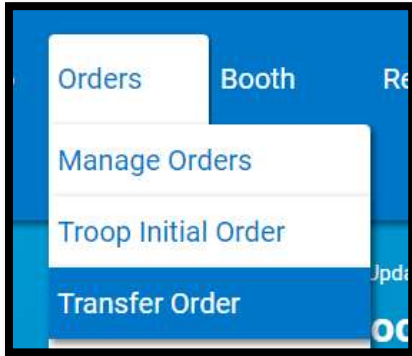
- Click *Save*.

## Transfers

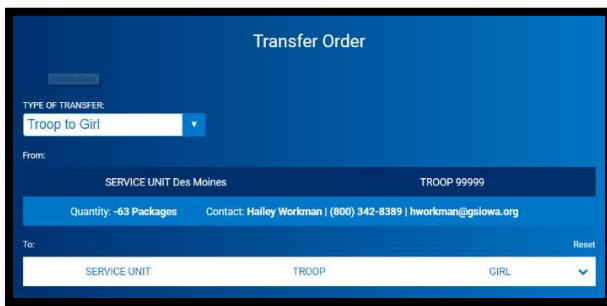
### Troop to Girl Transfers (T2G)

A *Troop to Girl Transfer* order in Smart Cookies needs to be made by the Troop Product Manager (TPM) each time cookies are transferred to girls from troop inventory. This is how a girl receives credit for the packages she sold, and it also allows the Recognition Order to be built later. We recommend transferring cookies *after* you have distributed cookies to girls. However, you can always adjust transfers and girl's inventories as needed, by editing the amounts transferred OR creating new *Girl to Troop* transfers.

1. Go to the *Orders* tab and select *Transfer Order* from the dropdown.



2. The *Type of Transfer* defaults to *Troop to Girl*.



3. Click on the drop-down box under *To:* to select the desired girl and click *Apply*.
4. Enter the quantities in PACKAGES by variety.
  - Enter in the quantity of packages the girl sold individually under the *Packages* column.
  - Enter in the quantity of packages to girl sold at a booth under the *Booth Packages* column – do this only if you are not going to use the *Smart Booth Divider* to give credit.
5. You may enter in any notes as you see fit in the *Order Notes* field.
6. Click *Save*.
7. You will receive a notification at the bottom the screen that your order was successfully saved.
8. You will then have the option to print a receipt, if you would like.
9. You then may choose to *Go to Manage Orders* to review your transfers or *Make Another Transfer*.

**Note:** All transfers from troop to girl that are not designated “booth packages” will become the financial responsibility of the individual girl. All *Troop to Girl Transfers* will appear on the *Girl Balance Summary* report, which details how much money each girl owes her troop for cookies sold.

## Troop to Troop Transfers (T2T)

Troops may transfer inventory to other troops if needed. A *Troop to Troop Transfer* order in Smart Cookies needs to be made by the troop **giving** the cookies. Once a *Troop to Troop Transfer* is complete, a confirmation email will be sent to the receiving troop. Cookies transferred become the financial responsibility of the receiving troop. Troops can make transfers to troops outside of their service unit if needed.

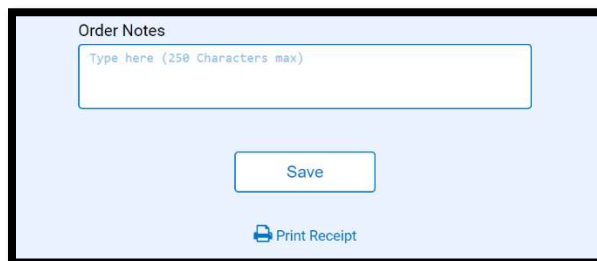
1. Repeat the steps from above to get to the *Transfer Order* screen.
2. Change the *Type of Transfer* to *Troop to Troop* from the dropdown.
3. Click on the drop-down box under *To:*, search and select the desired troop and click *Apply*.



The screenshot shows a table with the following columns: Item Name, Price, PACKAGES, and BOOTHS PACKAGES. The items listed are 'Thanks-A-Lot' and 'Smores', both priced at \$0.00. The quantity for each item is currently set to 0 in both the PACKAGES and BOOTHS PACKAGES columns. A 'Clear Order' button is visible in the top left corner.

			PACKAGES	BOOTHS PACKAGES
	Thanks-A-Lot	\$0.00	<input type="text" value="0"/>	<input type="text" value="0"/>
	Smores	\$0.00	<input type="text" value="0"/>	<input type="text" value="0"/>

4. Enter the quantities in PACKAGES by variety and click *Save*.
5. You may enter in any notes as you see fit in the *Order Notes* field as well as print a receipt, if you would like.



The screenshot shows the 'Order Notes' section with a text input field labeled 'Type here (250 Characters max)'. Below the input field are two buttons: 'Save' and 'Print Receipt'.

6. You will receive a notification at the bottom the screen that your order was successfully saved.
7. You then may choose to *Go to Manage Orders* to review transfers or *Make Another Transfer*.

## Girl to Girl Transfers (G2G) - Within the Same Troop

Troops may need to transfer packages between girls in their troop. A *Girl to Girl Transfer* can be entered by the TPM.

**Note:** Cookies transferred become the financial responsibility of the girl/family receiving the cookies.

1. Repeat the steps from above to get to the *Transfer Order* screen.
2. Change the *Type of Transfer* to *Girl to Girl* from the dropdown.

3. Click on the drop-down boxes under *To:* and *From:* to select the desired girls and click *Apply*.
4. Enter the quantities in PACKAGES by variety and click *Save*.
5. You will receive a notification at the bottom the screen that your order was successfully saved.

### ***Girl to Girl Transfers - Between Different Troops***

Sometimes girls give other girls cookies that are not in the same troop – for example, sisters in different troops. In this case, transferring cookies ensures the proper girl gets credit for her sales, and that financial responsibility for the cookies is transferred between troops. In order to do this type of transfer there is a 3-step process as we must do a *Girl to Troop*, *Troop to Troop*, and then *Troop to Girl Transfer*.

**Step One** – done by the TPM of the girl giving the cookies.

1. To transfer packages from one girl (Girl A) to another girl (Girl B) in a different troop, go to the *Orders* tab and select *Transfer Order* from the dropdown.
2. Change the *Type of Transfer* to *Girl to Troop* from the dropdown.
3. Click on the drop-down box under *From:* to select the desired girl and click *Apply*.
4. Enter the quantities in PACKAGES by variety and click *Save*. (This transfers the packages from the girl back to you (the troop))
5. You will receive a notification at the bottom the screen that your order was successfully saved.
6. Click *Make Another Transfer*.

**Step Two** –

7. Change the *Type of Transfer* to *Troop to Troop* from the drop-down.
8. Click on the drop-down box under *To:* to search for and select the desired troop and click *Apply*.
9. Enter the quantities in PACKAGES by variety and click *Save*.
10. You will receive a notification at the bottom the screen that your order was successfully saved.

**Step Three** – done by the receiving girl's TPM

11. Go to the *Orders* tab and select *Transfer Order* from the dropdown.
12. The *Type of Transfer* defaults to *Troop to Girl*.
13. Click on the drop-down box under *To:* to select the desired girl and click *Apply*.
14. Enter your quantities in PACKAGES by variety and click *Save*.
15. You will receive a notification at the bottom the screen that your order was successfully saved.

16. You then may choose to *Go to Manage Orders* to review transfers or *Make Another Transfer*.

**Note:** Cookies transferred this way become the financial responsibility of the girl/family receiving the cookies.

### ***Cupboard to Troop Transfers (C2T)***

Once your *Planned Order* is picked up and approved, it turns into a *Cupboard to Troop Transfer* in Smart Cookies, and the receiving troop will then get a confirmation email. It may take up to 48 hours for your order to show as transferred in Smart Cookies. If you do not see it after 48 hours, please contact us at [info@gsiowa.org](mailto:info@gsiowa.org).

**Note:** All *Cupboard to Troop Transfers* become the financial responsibility of the receiving troop.

### ***Troop to Cupboard Transfers (T2C)***

These are used to indicate when product has been exchanged. These transfers will be made by the Cupboard Manager and the troop will then receive a confirmation email.

See page 10 of the *2020 Cookie Program Kit* for full policy on exchanging and returning cookies.

## **Credit Card Payments**

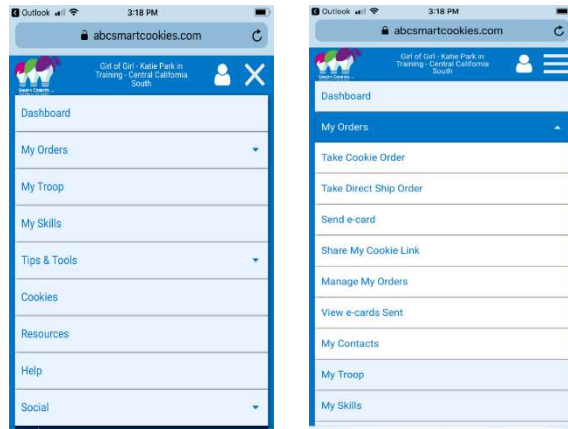
### **How Do We Accept Credit Cards?**

1. **Smart Cookies:** For individual girl orders and, new this year, for girls AND troops selling at booths:
  - a) Using a smart phone or desktop, any girl who has created her Smart Cookies account can accept credit card payments with NO PROCESSING FEES for individual girl orders.
  - b) Using a smart phone or desktop, any girl or troop who has access to Smart Cookies can accept credit card payments with NO PROCESSING FEES for cookies sold at all council- or troop-secured booths. Note: Booths must be approved for that troop in Smart Cookies in order to use this payment option.
2. **Clover:** For troops selling at booths:
  - a) Using a smart phone, troops can accept credit card payments at booths with the Girl Scouts of Greater Iowa (GSGI) sponsored Clover app (no card reader device required!). GSGI pays all processing fees associated with the Clover.

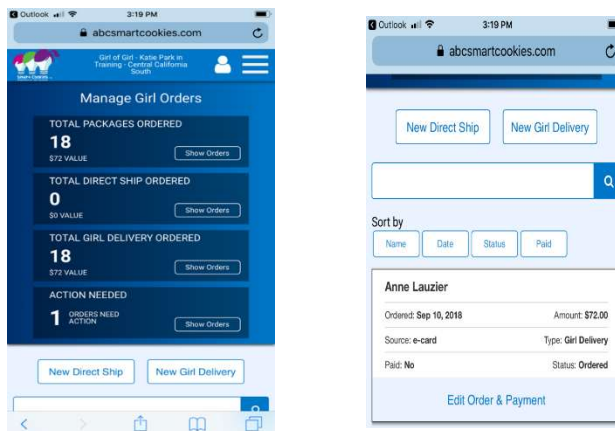
## Credit Card Payments for Girl-Delivered Orders

Customers can select to order cookies online but have the girl deliver them instead of paying for shipping. Girls will still need to collect payment at the time of delivery, if they are not already paid for online. Cookies must be marked *delivered* in order to be able to enter the payment information into Smart Cookies. In order to collect a credit card payment:

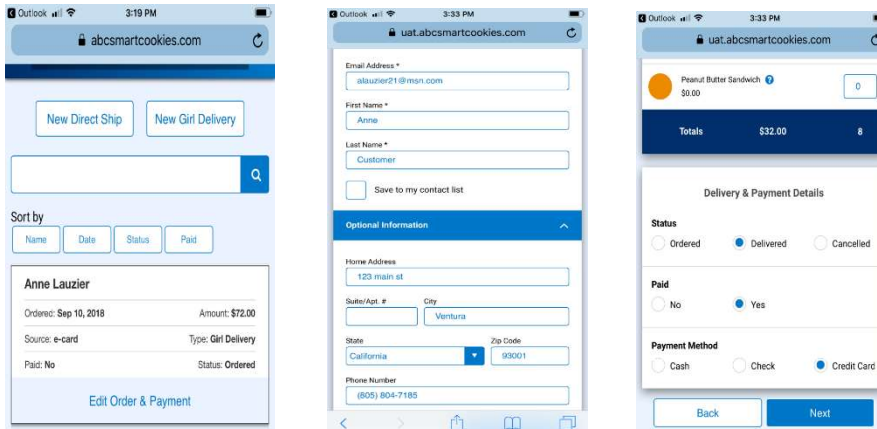
- Girls sign into Smart Cookies – app or desktop.
  - Log into the Smart Cookies app from your mobile device OR simply login at [abcsmartcookies.com](http://abcsmartcookies.com) and use your desktop.
  - Here we show screenshots using the app, but all steps are EXACTLY the same when using the browser application – the steps and functions are the same, only the appearance is different using app vs. desktop.
- Navigate to *My Orders*



- Select *Orders* in the *Total Girl Delivery Order Section* to view orders.



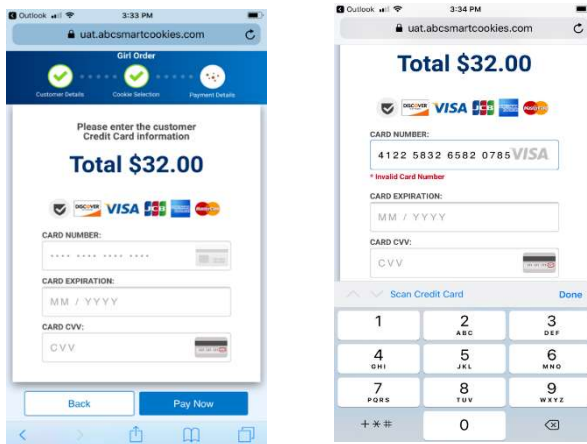
4. Update the order if any changes are required.



5. Enter the customer’s credit card information.

- Have the customer manually read the card number for manual/keyed entry. If errors are made during manual entry, an error message will be displayed to the girl.
- Using an iPhone? Simply scan the credit card. The image does NOT save to the girls’ phone. This feature is NOT available for Android devices.

**Pro Tip:** This iPhone feature works when using Safari browser only, as opposed to logging into the app.



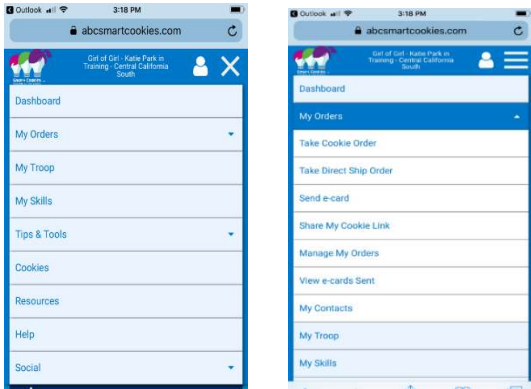
- Payments will automatically post to Smart Cookies. Credits to girls and troops automatically post in Smart Cookies.

## Credit Card Payments for In-Person Orders

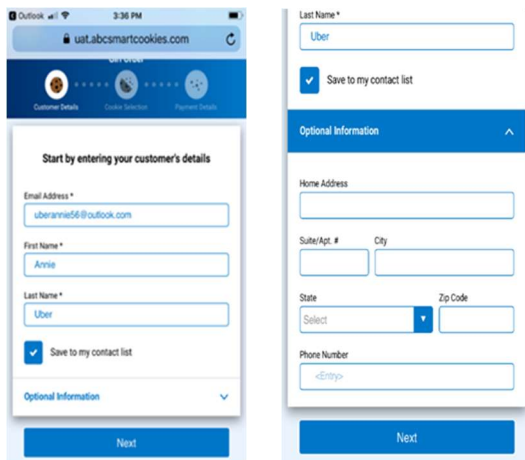
Girls can take credit card payments for cookies as they are selling in-person. Cookies must be marked *delivered* in order to be able to enter the payment information into Smart Cookies. In order to collect a credit card payment:

- Girls log into Smart Cookies – app or desktop.
  - Log into the Smart Cookies app from your mobile device OR simply login at abcsmartcookies.com and use your desktop
  - Here we show screenshots using the app, but all steps are EXACTLY the same when using the browser application – the steps and functions are the same, only the appearance is different using app vs. desktop machine

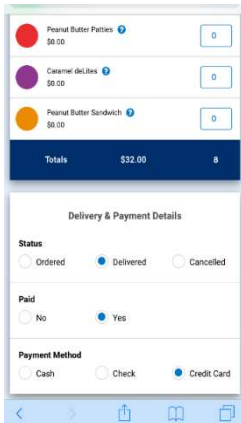
- Navigate to *My Orders*.



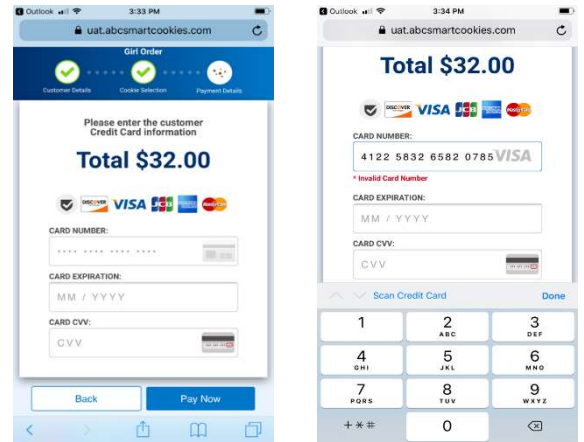
- Enter customer's contact information.



- 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 in the customer's credit card information!
  - Have the customer manually read card number for manual/keyed entry. If errors are made during manual entry, an error message will be displayed to the Girl
  - Using an iPhone? Simply scan the credit card. The image does NOT save to the girl's phone. This feature is NOT available for Android devices.



**Pro Tip:** This iPhone feature works when using Safari browser only, as opposed to logging into the app.

- Payments will automatically post to Smart Cookies. Credits to girls and troops automatically post in Smart Cookies.

## Viewing Data for In-Person Orders – Smart Cookies Reconciliation

- Both girls and troops are credited with the full credit card payment collected.
- Sales are captured in the bank named *Girl Delivery Credit Card* and have a unique reference number.
- Financial Transactions are visible in the *Order*, *Girl Balance Summary* report and *Troop Balance Summary* report.
- No funds are deposited to troop bank accounts and product must still be transferred to the girl through a *Troop to Girl Transfer*.

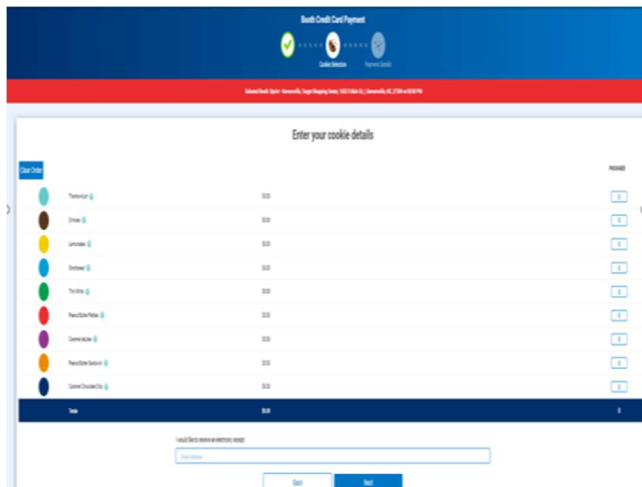
Locked	Transaction #	District	Service Unit	Troop	Bank	Date	Type	Amount	Ref #
<input checked="" type="checkbox"/>	CT2085247222	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/6/2018	ACH Deposit	\$32.00	549692
<input checked="" type="checkbox"/>	CT2085455236	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/6/2018	ACH Deposit	\$37.00	549810
<input checked="" type="checkbox"/>	CT646527028	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/16/2018	ACH Deposit	\$36.00	549858
<input checked="" type="checkbox"/>	CT703491231	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/27/2018	ACH Deposit	\$24.00	549817
<input checked="" type="checkbox"/>	CT703565903	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/27/2018	ACH Deposit	\$24.00	549816
								Sum:	\$153

The payments in the *Financial Transaction* screen above show on the *Troop Balance Summary* and *Girl Balance Summary* reports - there is no corresponding cookie transaction (as there is with direct ship).

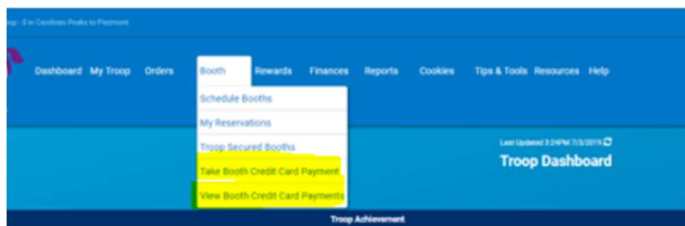
## Credit Card Payments for Booth Sales

There is a new feature under the *Booth* tab in Smart Cookies this year which allows girls and troops to 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 in Smart Cookies. Only booths that have been approved in Smart Cookies will be eligible for this payment option. Note: 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.

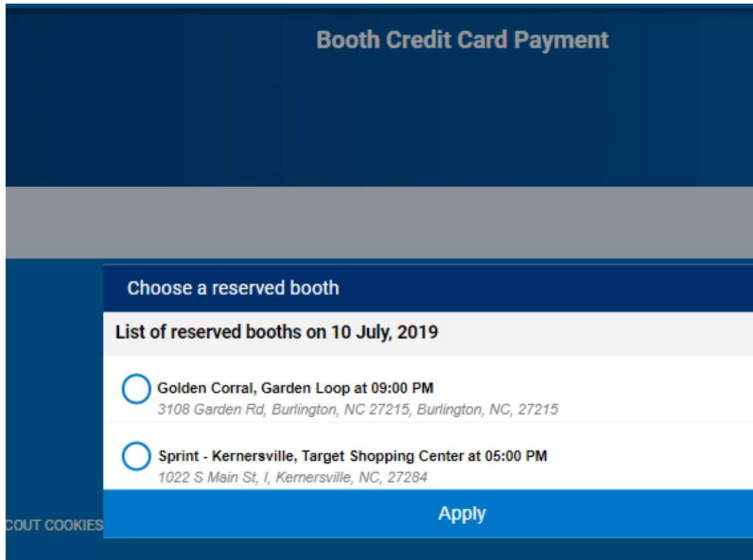
1. Girls sign into Smart Cookies – app or desktop.
  - Log into the Smart Cookies app from your mobile device OR simply login at [abcsmartcookies.com](http://abcsmartcookies.com) and use your desktop.
  - Here we show screenshots using the app, but all steps are EXACTLY the same when using the browser application – the steps and functions are the same, only the appearance is different using app vs. desktop.



2. Using the new menu option on Troop and Girl Dashboards, select the *Booth tab*, and select *Take Booth Credit Card Payment* from the drop down.



- Troop assigned booths will for that day will appear, select the correct booth from the list by checking the circle. Click *Apply*.

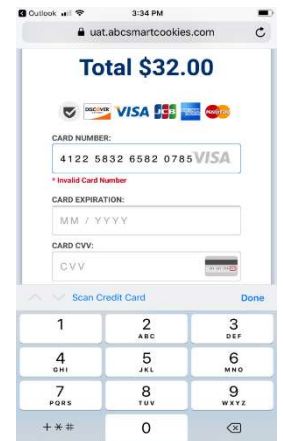
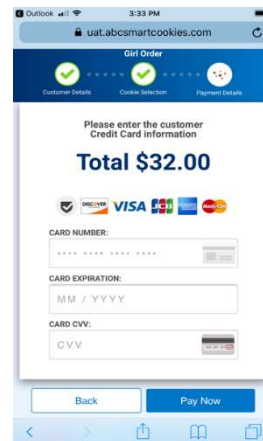


- On the *Order* page enter the customer's order by variety, in packages. As an option feature, the customer can provide an email for a receipt. Click *Next*.
- Enter in the customer's credit card information.

- If you receive an error message, double check that all information was entered correctly.
- Using an iPhone? Simply scan the credit card. The image does NOT save to the Girl's phone. This feature is NOT available for Android devices.

**Pro Tip:** This iPhone feature works when using Safari browser only, as opposed to logging into the app

- Payments will automatically post to Smart Cookies. Credits to girls and troops automatically post in Smart Cookies.



## Viewing Data for Booth Orders – Smart Cookies Reconciliation

- The troop is credited with the full credit card payment collected.
- Sales are captured in the bank named *Booth Payment Credit Card* and have a unique reference number
- Financial Transactions* are visible in the *Order*, the *Girl Balance Summary* report and the *Troop Balance Summary* report. You can also view all credit card transactions accepted at booths, under the *Booth* tab to view the following information:

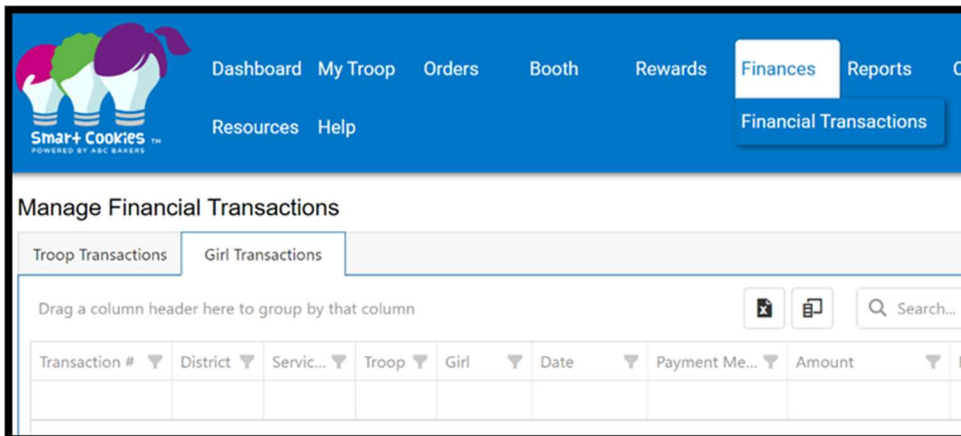
- Transaction number, customer email, packages sold and amount, booth details, and transaction timestamp.
- There is also an option to resend the email receipt.
- No funds are deposited to troop bank accounts and product must still be transferred to the girl through a *Troop to Girl Transfer*.

## Tracking Finances

### Girl Transactions

After you have given out the Troop Initial Order, girls should be turning in money before they get more cookies. Smart Cookies gives you the ability to track each girl's payments within the system. This is an optional tool for your convenience – tracking girl finances in Smart Cookies is not required.

1. To add a payment received from a girl/family, go to the *Finances* tab, and select *Financial Transactions* from the dropdown.



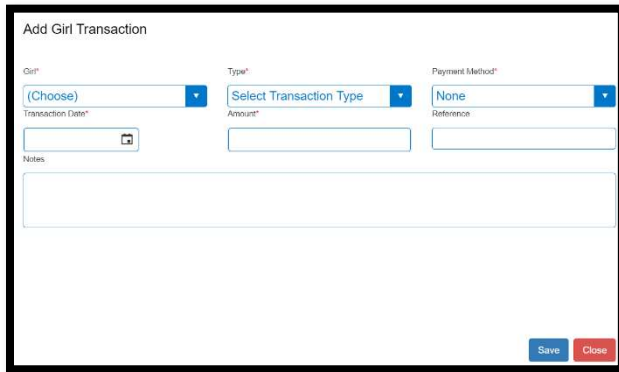
Manage Financial Transactions

Troop Transactions | Girl Transactions

Drag a column header here to group by that column

Transaction #	District	Service Unit	Troop	Bank	Date	Type	Amount	Ref #
0000002	DM Metro	Des Moines	99999	GSGI	9/18/2019	ACH Deposit	\$12.00	
							Sum: \$12	

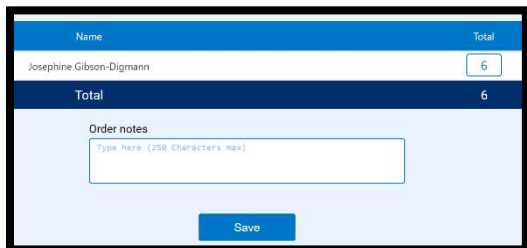
2. Click on the *Girl Transactions* tab.



3. Click on *Add Girl Transaction*.

Girl Balance Summary Report'." data-bbox="178 320 573 384"/>

4. Select the desired *girl*, *Type*, and *Payment Method*.
5. Enter in the *Transaction Date* and *Amount*.
6. Use the *Reference* field as you see fit.
7. The *Notes* section can be useful to remind yourself where you collected the money and who gave it to you.



8. Click *Save*.
9. You will receive a notification at the bottom the screen that your financial transaction was successfully created.

## Troop Transactions

Only Girl Scouts of Greater Iowa has access to enter financial transactions for payments made by the troop. You will see these under the *Troop Transactions* tab under *Financial Transactions*. You'll most often see two transactions: *ACH Deposits*, indicating money received by Girl Scouts of Greater Iowa from the auto-withdrawals, and *Direct Ship Direct Deposit*, from online sales through Smart Cookie Direct Ship.

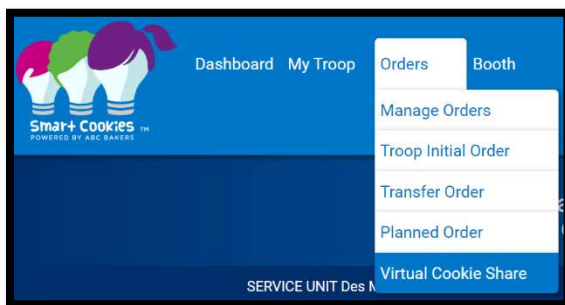
# Cookie Share

## Virtual Cookie Share

Virtual Cookie Share is used to track troop donations towards participation in Girl Scouts of Greater Iowa's (GSGI's) Cookie Share Program. For each \$4 donation by customers, the TPM assigns one Virtual Cookie Share in Smart Cookies to a girl.

GSGI will donate Virtual Cookie Share cookies to various non-profit organizations across our council, including food banks, shelters, and military organizations. Virtual Cookie Share cookies do not come from your troop inventory.

1. To record a *Virtual Cookie Share*, go to the *Orders* tab, and select *Virtual Cookie Share* from the dropdown.



2. Enter the quantities in PACKAGES by girl and click *Save*.
3. Each girl that has at least 6 *Virtual Cookie Share* donations credited to her will receive the Cookie Share patch.

## Logging Virtual Cookie Share using the *Smart Booth Divider*

If a troop receives Virtual Cookie Share donations at a booth sale, the *Smart Booth Divider* can be used to record the Virtual Cookie Share donations. *Virtual Cookie Share* is recorded under *CShare*.

See page 11 for more information on how to use the *Smart Booth Divider*.

## Troop Cookie Donation

Your troop can also choose to use your troop's cookie inventory for donations to local charities or organizations. Troop Cookie Donations are separate from Virtual Cookie Share, in which GSGI delivers the donated cookies. For troop donations, you will need to transfer the donated cookies to girls in the troop, as a Troop to Girl Transfer in Smart Cookies, just like any other cookies she sold.

## Troop Proceed Plans, Reward Plans, and Recognition Orders

Before placing your *Recognition Order*, you will need to make sure that you have selected the right *Proceed Plan* and *Reward Plan* for your troop, all *Troop to Girl Transfers* are completed, *Virtual Cookie Share* orders are placed, and the total packages transferred to each girl is correct. You can verify these numbers using the following reports:

- **Proceed Plan:** *Troop Balance Summary*
- **Main Reward Plan:** *Troop Balance Summary*
- **Total Packages per Girl:** *Girl Cookie Total Summary*. The number of packages that each girl has sold is the number that will correspond with her recognitions and Cookie Dough.
- **Virtual Cookie Share:** *Troop Balance Summary*
- **Troop to Girl Transfers:** *Transfer Order Summary*

### Selecting a Proceed Plan

Troops and Juliettes will need to choose from one of two proceed plans. When you select at this level you are deciding whether your troop or Juliette will be opting in to earn rewards (whether it's an item or Cookie Dough) or opting out completely (to earn additional troop proceeds/program credits). Select from the following proceed plans:

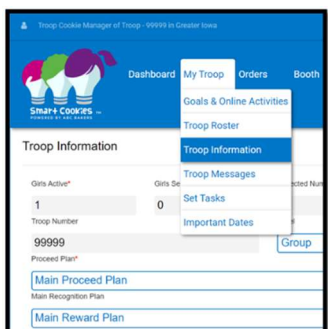
**The Main Proceed Plan:** This is the default plan. Troops earn troop proceeds and Juliettes earn Juliette Program Credits, plus the girls earn Cookie Dough based on the number of packages sold AND collect reward items or additional Cookie Dough as levels are reached.

OR

**The CSA Opt-Out Proceed Plan:** Cadette, Senior, and Ambassador Troops and Juliettes can opt-out of all reward items to earn more troop proceeds or Juliette Program Credits! The girls still earn Cookie Dough based on the number of packages sold. This is a group decision, individual girls within a troop cannot choose this option without the rest of the group.

For more details on each plan see the *Cookie Program Kit* or the *Juliette Letter*.

1. To choose your proceed plan, go to the *My Troop* tab, and select *Troop Information* from the drop-down.



2. Select the desired *Proceed Plan* from the drop-down. The *Main Proceed Plan* is the default choice.
3. Click *Update Information* at the bottom of the screen to save your choice.

Everyone, including Juliettes, will still be able to earn the 700 Club, troop experiences and CEO Party if earned, regardless of proceed and reward plan selected.

## Assigning a Reward Plan to Girls (Troop Level)

Troops and Juliettes will need to choose from one of two Reward Plans. Select a Reward Plan for ALL girls in the troop, based on their preference for rewards items and/or bonus Cookie Dough or to opt-out of all cumulative rewards and Cookie Dough to receive either the tech or experience reward item. See the *Troop Rewards Panel* or *Juliette Rewards Panel* for details on what items are earned at each level. You can adjust this for each individual girl (see directions below) if not all the girls in your troop want to select the same Reward Plan option. Select from the following Rewards Plans:

**Main Reward Plan:** This is the default reward plan. Rewards within the Main Reward Plan are cumulative, and girls earn the items and/or bonus Cookie Dough at each level they reach. They also earn Cookie Dough based on the number of packages sold. Girls must select either Cookie Dough or items at each reward level, mixing and matching Cookie Dough with reward items if they choose. Therefore, a reward item or Cookie Dough selection must be made at each reward level for each girl. These selections can be made when you place the *Recognition Order* for the troop at the end of the program.

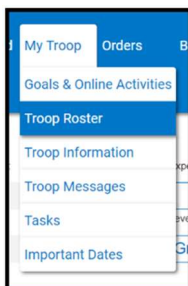
**OR**

**Tech or Experience Non-Cumulative Opt-Out Reward Plan:** Girls who sell 1000 or more packages may select the Tech or Experience Non-Cumulative Opt-Out Reward Plan instead of the Main Reward Plan. With this plan the girl opts-out of all reward items AND Cookie Dough. NEW this year, girls who choose opt-out rewards will start earning Cookie Dough at 1050 packages! See the *Reward Panel* for details on what items are offered at specific levels.

## Assigning a Reward Plan to Girls (Individual Girl)

You can adjust or select a reward plan for each girl, based on her preference for rewards items and/or bonus Cookie Dough. See the *Troop Rewards Panel* or *Juliette Rewards Panel* for details on what items are earned at each level.

1. To assign a Rewards Plans to a girl, go to the *My Troop* tab, and select *Troop Roster* from the drop down.



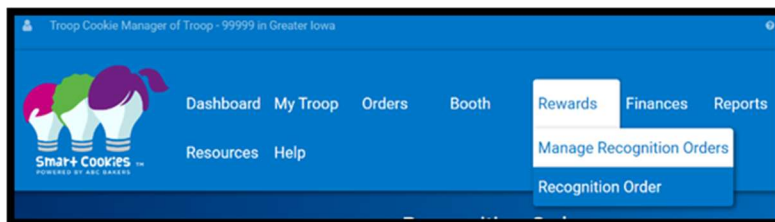
2. Find the desired girl and double click on her name. (You may also click on the pencil to the right.)
3. Select the desired *Main Recognition Plan* from the drop down. The *Main Reward Plan* is the default choice.
4. Click *Save*.

Girls who choose the Tech or Experience Non-Cumulative Opt-Out Reward Plan are still eligible for patches, Adventureland 700 Club Celebration, Camp Kit (or Cookie Dough) and CEO Party.

## Creating and Placing the Recognition Order

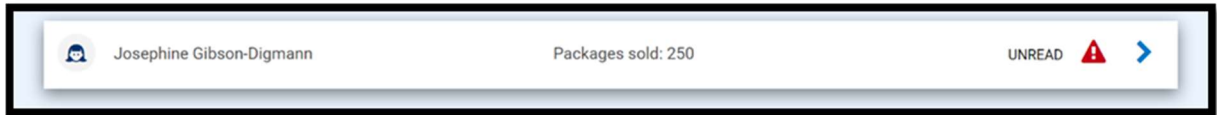
After cookies have been transferred down to the girls, EVERY TROOP AND JULIETTE will need to create a *Recognition Order*, so the appropriate rewards and patches are ordered. The reward screen will populate the rewards each girl has earned according to the number of packages that have been transferred to her.

1. Go to the *Rewards* tab and select *Recognition Order* from the dropdown.

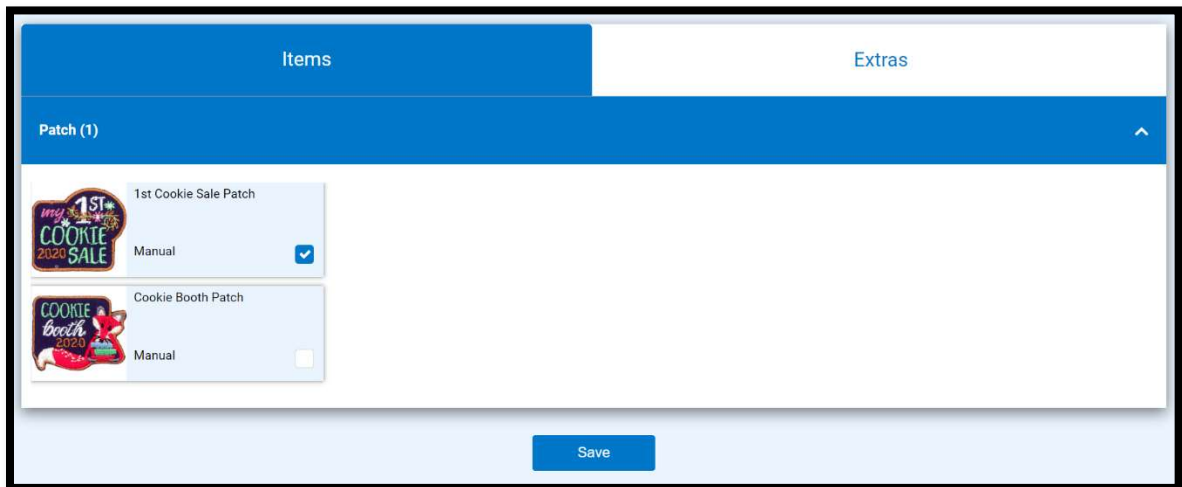


2. Select the *Order Type* from the drop down where it says *Select Recognition Order*. The only option should be *Main*.

3. Click on the desired girl by selecting the arrow on the right side of the screen to have her rewards calculate.
  - If there is anything that needs attention, such as choosing a reward at a level or needing a t-shirt size, a red triangle with an exclamation will appear.



4. To request the 1<sup>st</sup> Cookie Booth, 1<sup>st</sup> Cookie Sale, and Last Blast Cookie Booth Patches, click on the *Extras tab* and check the box. These are ordered ‘on your honor’.



5. Click *Save* at the bottom of the screen.
6. Repeat this process for each girl.

Some additional notes about *Recognition Orders*:

- Do not commit the *Recognition Order*. Once the order has been committed, no changes can be made. Girl Scouts of Greater Iowa will commit all orders after the deadline has past.
- Once you create the *Recognition Order* for the first time, you will need to select *Manage Recognition Orders*, under the *Rewards* tab to be able to see your order and make any edits if needed.

