



Quick Bites

Smart Cookies User Registration – Volunteers

- Video: [Smart Cookies Registration Video](#)
- Registration emails are sent from noreply@abcsmartcookies.com.

HINT: Add noreply@abcsmartcookies.com to your safe sender list to insure you get all emails in season.

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://www.abcsmartcookies.com/#/registration?token=5b014270-317c-46c9-9aa4-b94694160f73>

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

SAMPLE

Click on the link in the email and complete all required information. You will select your own password. Once you click save, you will receive a confirmation email containing your login credentials. You can also reset your password by clicking on the “Forgot Password” link on the log-in page.

Council: Anne's Training Site
Service Unit: Coastal One
Anne Lauzier

Service Unit Info

Username: Phone:

Password:

Pin/Color Password:

Email:

Home Address:

Suite/Apt #:

City:

State:

Zip Code:

NOTE: Completing your registration in Smart Cookies does not flow into Digital Cookie. You will receive an email from Digital Cookie based on your Council settings to set up your account in that system. Contact your Council if you do not receive the Digital Cookie email.



Quick Bites

Smart Cookies Tabs and Functions for Troops

The following tabs appear in Smart Cookies when logging in. All functions are managed by permissions at the Council level so you may not see every option or have access to the functionality. Contact your local Council with any additional questions on your permissions.

DASHBOARD

- View key metrics including important dates, sales, finances, direct ship sales and users

MY TROOP

- Goals and Online Activities, Troop Roster, Troop Information, Troop User Management, Messages, Tasks, Important Dates

ORDERS

- Manage Orders, Troop Initial Order, Transfer Order (all types), Planned Order, Damage Order, Virtual Cookie Share

BOOTH

- Schedule Booths (Lottery and First Come First Serve), My Reservations, Troop Secured Booths (virtual and traditional), About Booth Sales, Booth Sale Checklist, Activities, Promotion

REWARDS

- Manage Recognition Orders, Create Recognition Order

FINANCES

- Financial Transactions (add girl transactions)

REPORTS

- Current, Archived

COOKIES

- Line Up, Nutritional Information

TIPS AND TOOLS

- Rally Guide, Volunteer Resources

MEDIA

- Flyers, Training Videos, Clip Art

HELP

- 24/7 Help Desk Contact Information

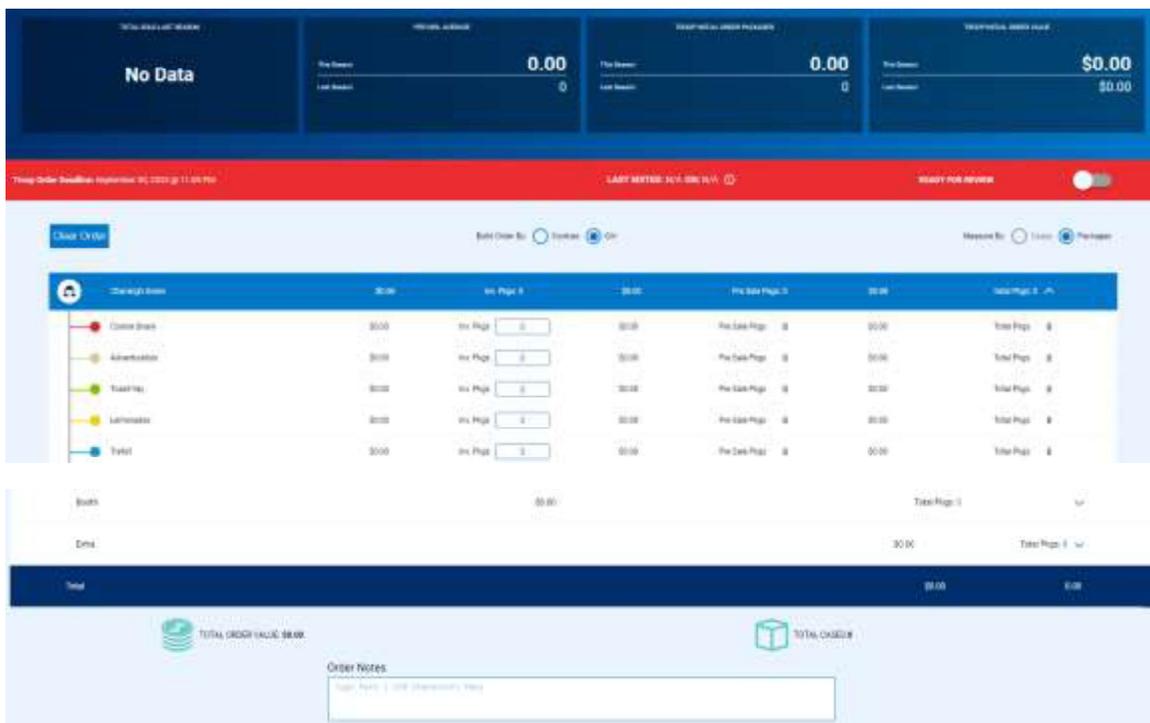


Quick Bites

Creating an initial order – Order Taking Sale

You can view our video [Creating Initial Order by Girl YouTube Link](#) or follow these instructions:

- Log i into Smart Cookies and navigate to Orders>Troop Initial Order .
- Click on a girl name to display all cookie varieties.
- For order taking sales, during the initial order period, your Troop initial order will populate with information from Digital Cookie. The first column (Inv) may contain packages entered by the parent from the paper order card. These numbers may be edited. The second column (pre-paid) will total all girl delivery pre-paid packages ordered from customers and is not editable. Enter any packages needed in the first column or edit if desired. To verify numbers are accurate run the All Order Data report for girl delivery and the Initial Order report for parent entered orders from Digital Cookie.
- On the booth row at the bottom of the page, enter additional packages for your Troop to use at booth sales. The extra line will round all varieties up to full cases (not Cookie Share). Extras line is not editable. Click Save when order complete.



After you have saved your Troop order, your delivery location(s) will display. Click on the name of the location for cookie pick up (you may only have one option). If the location schedules appointments, you will have the opportunity to select an appointment time. Save the delivery location. If you make changes to your Troop order, you must select the delivery station again.

Once your initial order is complete, you can click ready for review to notify the Service Unit that your order is complete.





Quick Bites

Reviewing and Submitting Orders – Service Unit

On the dashboard under Action Items, locate the link for Troops with no initial orders. Export data and contact any Troops who missed the order deadline. You can enter orders for them as instructed by your Council prior to your Service Unit deadline.

Action Items	Numbers
Troops with no Initial Order	446
Troops with no Early Recognition Orders	1012

Make sure that all Troops are assigned to a delivery station. Go to Reports> Entity> Troops with No Assigned Delivery Station. Go to Orders>Manage orders and filter for initial orders. Select the Troop order with missing delivery station and click the dots to open the order. Scroll to the bottom and save order and the delivery station will appear. Select delivery station and appointment day/time as needed.

9 Results

Search By: All Keyword:

From: To: Apply

Cases
 Packages
 Cases/Packages

DATE	ORDER #	TYPE	TO	FROM	CShare	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFT	STA	TOTAL	TOTAL \$
1/28/2018	763	INITIAL	4089	4089	0	12	12	12	0	24	24	24	0	0	T	106	340.00
1/28/2018	680	INITIAL	4087	4087	0	12	24	36	12	216	72	144	24	0	T	540	2700.00
1/29/2018	1142	INITIAL	1726	1726	0	72	144	96	72	264	120	216	84	0	SAVED	1068	5340.00
1/25/2018	136	INITIAL	1557	1557	4	48	96	120	60	240	120	216	60	0	T	964	4820.00

Once all Troops are assigned to a delivery station, go back to Orders>Manage Orders and filter for initial orders. Under action, select submit all and then click apply. You will receive a message that the job was submitted for processing. It may take a few minutes to run. The status on all Troops will now say “S” meaning that all orders are now ready for review at the Council level.

Go to the dashboard and click the link for Troops with no early recognition orders (if applicable). Export information and create orders for any Troops missing the deadline. Once all recognition orders have been created go to Rewards >Manage Recognition orders. Filter for orders needing review (R). Click Review All. Once all orders are reviewed, go back to Rewards>Manage orders, filter for Early orders and select all orders (select by clicking the box on the far left) click submit all and all recognition orders will be submitted and status will change to “S”.

POWERED BY ABC BAKERS

Manage Recognition Orders

Drag a column header here to group by that column

District	Service Unit	Troop	Rec Order T...	Order Da...	Order Nu...	Cost \$	Status
<input type="checkbox"/> No Specified District	SU101	1764	Early	1/28/2018	9389	\$312	U
<input type="checkbox"/> No Specified District	SU101	3806	Early	1/28/2018	9387	\$195	R
<input type="checkbox"/> No Specified District	SU101	4134	Early	1/28/2018	9385	\$234	U
Total Cost : \$7...							

20 30 40 50

Review All Commit All Uncommit All

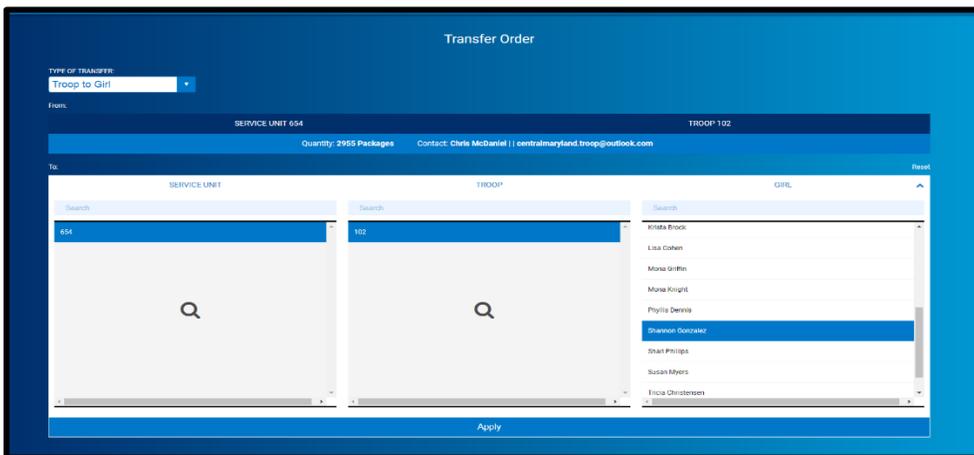


Quick Bites

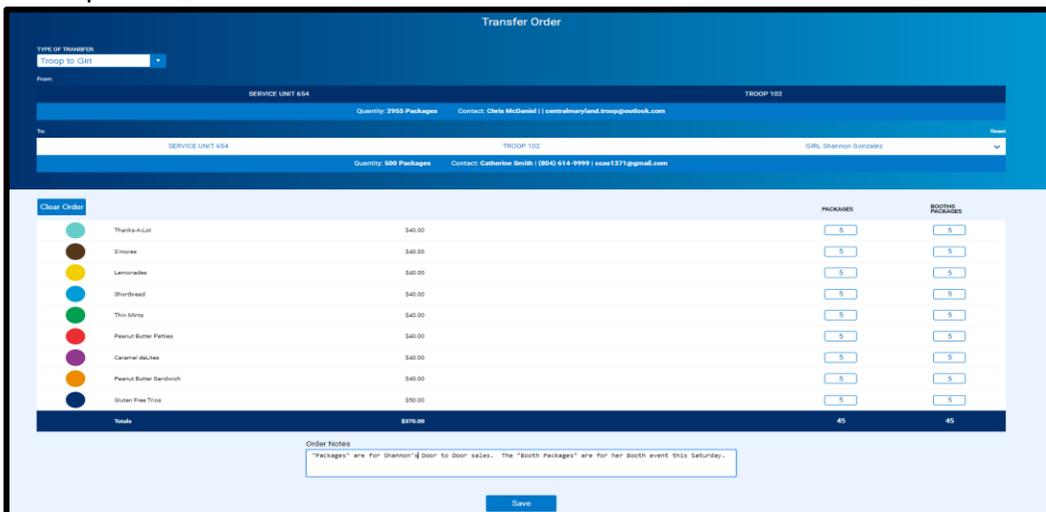
Transfers:

View this video: [Creating a Troop to Girl Transfer Order - YouTube Video](#) (Troop to girl) or follow these instructions.

Log into Smart Cookies and navigate to Orders>Transfer Order. Your Service Unit and Troop will automatically be selected as the “From” Troop. Click on the arrow next to “Girl”, highlight the girl receiving cookies, and hit Apply.



Enter the number of packages for the girl. Entries in the “Packages” column will transfer financial responsibility to the girl. Entries in the booth column will give girl credit for recognitions but not assign financial responsibility. It is strongly recommended to use the Smart Booth Divider to allocate booth packages. Notes are optional. Click Save. You can then create another transfer or go to manage orders. Use receipts to back up all transactions.



NOTE: Other transfer types are girl to Troop, girl to girl and Troop to Troop (depending on council preferences). Basic function remains the same. For Troop-to-Troop transfers, only the receiving Troop can

initiate the transfer. In this case your Troop will automatically populate as the "TO" Troop and you will be able to select the Troop that transferred the product to you. Use receipts to back up all transactions.



Quick Bites

Troop Site Link and Troop Pick Up Orders

If a Troop has set up their virtual links in Digital Cookie, they will need to distribute among the girls. There are multiple order types that might be generated based on Troop set up. Here is how to post each order in Smart Cookies to keep Troop inventory up to date and give credit to girls.

1. **Orders for the Troop for delivery** When the Troop sets up their Troop site in Digital Cookie, they have the option to choose to offer delivery on any orders generated by the Troop link. Orders will appear on the Digital Cookie All Orders report with the designation In Person Delivery. The girl first name will display as "TroopXXXX" and the last name will appear as "Site". Once the orders are approved the total sales will appear on the Troop booth reservation page as a Virtual Delivery. All sales for the season will populate into this booth section. Use the Smart Booth Divider to allocate the cookies to the girls. Once cookies are allocated to girls, the Troop inventory will be adjusted to remove the sold and delivered packages.

Booth - Troop Reservations page:

The screenshot shows the 'Virtual Booth Divider' interface. At the top, there is a table with columns: STORE, ADDRESS, CITY, ZIP CODE, DATE, TIME, PREMIUM, TYPE, STATUS. Below this, there are two rows of data. The first row is highlighted in yellow and labeled 'Virtual Delivery' with a 'Pending Distribution' status. The second row is labeled 'Test Booth'. Below the table is a summary box titled 'Total Virtual Booth Sale Summary (Packages)' with three large numbers: 6 (Total Left to Distribute), 0 (Total Distributed), and 6 (Total Sold) for a total of \$30.00. At the bottom, there is a row of buttons for different cookie types: CShare, ADV, TY, LEM, TRE, TM, PGP, CD, PBS, GFC.

2. **Virtual Booth Pick Up Orders** Troops have the option in Digital Cookie to allow customers to pre-order cookies and pick up at an existing booth location. Navigate to Virtual Booths tab on the Troop dashboard in Digital Cookie and select ADD PICK UP to the booth locations. All orders must be approved in Digital Cookie and will be designated in the All Orders reports with the order Type "Pick-Up". You can also run the Booth Sales Credit Card Export Report and filter for Type "Pick Up" and location date and time of booth. Both reports will show the same order details. Once the cookies are picked up, add these totals to the number of packages sold to any walk-up customers and enter in the Smart Booth Divider for that booth location. Using the Smart Booth Divider, allocate the cookies to girls as desired.

Type	Transactio	CreatedUs	CustomerI	CustomerI	CanTextC	ClAmount	Location	Address	ReservationDate	Reservatic	Status	TimeStam	CShare	ADV	TY	LEM	TRE
Pick Up	80594180				No	6	Test	143 Abbot	12/5/2023	12:00 PM	Approved	16:37:49	0	1	0	0	0
Pick Up	80594239				No	6	Belmont C79 Leonari		12/5/2023	07:00 PM	Approved	20:38:38	0	0	0	0	0
Pick Up	80594244				No	12	Belmont C79 Leonari		12/5/2023	07:00 PM	Approved	20:38:40	0	1	0	0	0
Pick Up	80594255				No	24	Belmont C79 Leonari		12/5/2023	07:00 PM	Approved	21:07:39	0	0	0	0	0
Pick Up	80594259				No	24	Belmont C79 Leonari		12/5/2023	07:00 PM	Approved	21:07:40	0	0	0	0	0
Pick Up	80594277				No	12	Belmont C79 Leonari		12/5/2023	07:00 PM	Approved	21:23:11	0	0	0	0	0

DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
Saturday, Feb 04	03:00 PM - 06:00 PM	<input checked="" type="checkbox"/>	FCFS	Booth Details Smart Booth Divider Remove Reservation		
Sunday, Feb 26	03:00 PM - 06:00 PM	<input type="checkbox"/>	FCFS		0	0

The screenshot shows the 'Smart Booth Divider' interface. At the top, there is a summary box titled 'Booth Summary (Packages)' with three large numbers: 0 (Total Left to Distribute), 0 (Total Distributed), and 0 (Total Sold) for a total of \$0.00. Below this, there is a row of buttons for different cookie types: CShare, ADV, TY, LEM, TRE, TM, PGP, CD, PBS, GFC. At the bottom, there are two buttons: 'Save and Go Back' and 'Save and Distribute Sales'.



Quick Bites

Managing Troop Direct Ship Orders

Follow the instructions below to distribute any orders the Troop receives from their Troop Ship Only link. These orders can be viewed in Digital Cookie as well under the All orders reports. The Troop ship only orders will be identified with the naming convention Girl First Name = TroopXXXX; Girl Last Name = Site and Type of order Shipped or shipped with donation.

Log into Smart Cookies and navigate to Orders>Troop Direct Ship.

DATE	ORDER #	Customer Name	Customer Address	Status	CShare	TY	SMR	LEM	SB	TM	PSP	CD	PBS	GFC	TOTAL
12/16/2020	1867	chippy ef	[REDACTED] Jersey, United States, 08836	Pending Distribution	1	1	8	8	2	12	8	1	1	11	53
12/16/2020	1866	chippy ef	[REDACTED] Jersey, United States, 08836	Pending Distribution	0	3	3	3	3	3	3	0	0	3	21
12/16/2020	1865	chippy ef	[REDACTED] United States, 08836	Pending Distribution	0	0	2	0	2	3	3	0	0	4	14

Any orders that have not been distributed will be shown in red as Pending Distribution. Scroll to the bottom of the page and click Distribute button. This will open a grid of all girls in the Troop. Select the girls who will receive credit.

Girl Name	CShare	TY	SMR	LEM	SB	TM	PSP	CD	PBS	GFC	PACKAGES SOLD
Cindy Regression	0	2	6	5	3	9	7	0	0	9	41
Regression Girl	0	2	6	5	3	9	7	0	0	9	41
Packages left to Distribute	1	0	1	1	1	0	0	1	1	0	6
Troop Total	0	4	12	10	6	18	14	0	0	18	82

Each variety will be evenly distributed between selected girls. Edit any remaining packages until all cookies are distributed. Click Save. **Be sure that ALL Troop direct ship orders have been distributed to girls prior to creating your main recognition order. All Troop direct ship orders must be distributed to be correctly displayed on Troop balance summary reports.**



Quick Bites

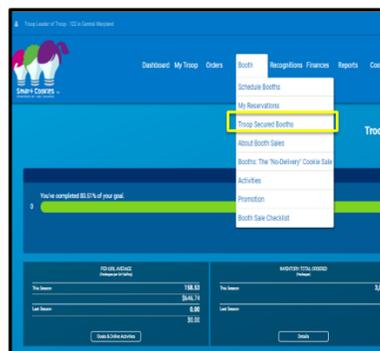
Troop Secured Booths

View this video: [Troop Secured Booth Video](#) or follow the instructions below.

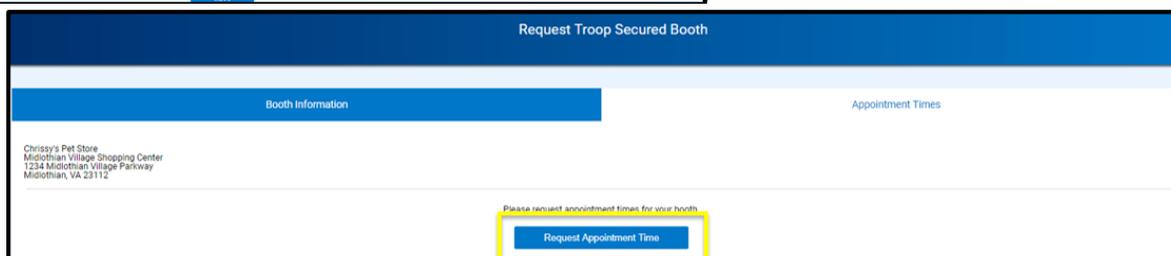
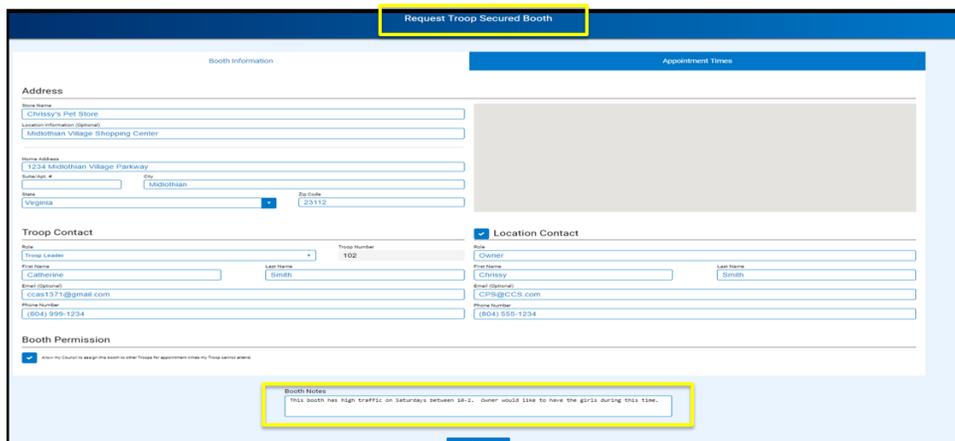
Log into Smart Cookies and navigate to Booth>Troop Secured Booth.

Fill out all the required information on the Booth Information Tab. All fields marked with an asterisk are required fields. The Troop contact field will default to the user creating the entry.

The Booth Permission box will allow the council permission to assign another Troop to the location in the event the requesting troop cannot attend the booth. If the box is not checked, other Troops cannot be assigned to the location.



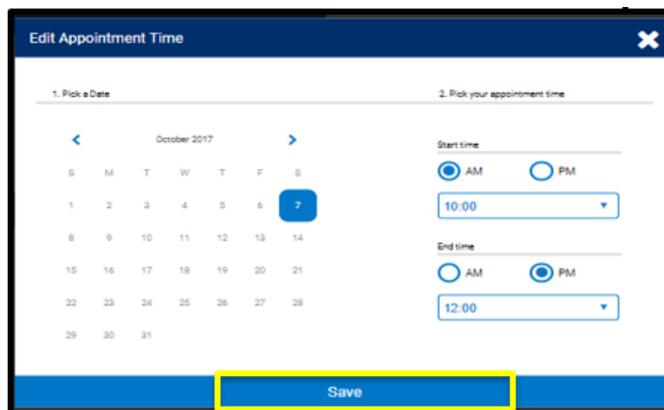
After all information is complete, click on the Request Appointment Time tab.



Click Request Appointment Time

Select the date and time for the booth request. If multiple dates and times are desired, click save after each date and time is entered and repeat for each additional day and/or time.

Requested booths will appear on the Booth>My Reservations tab in Smart Cookies. Status will display as requested, approved or denied. Troop contact will receive an email when the requested booth is approved or denied.

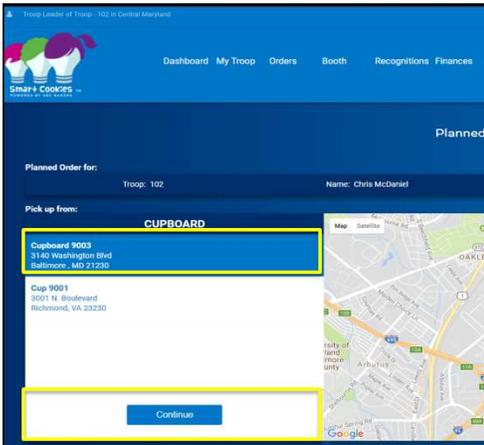




Quick Bites

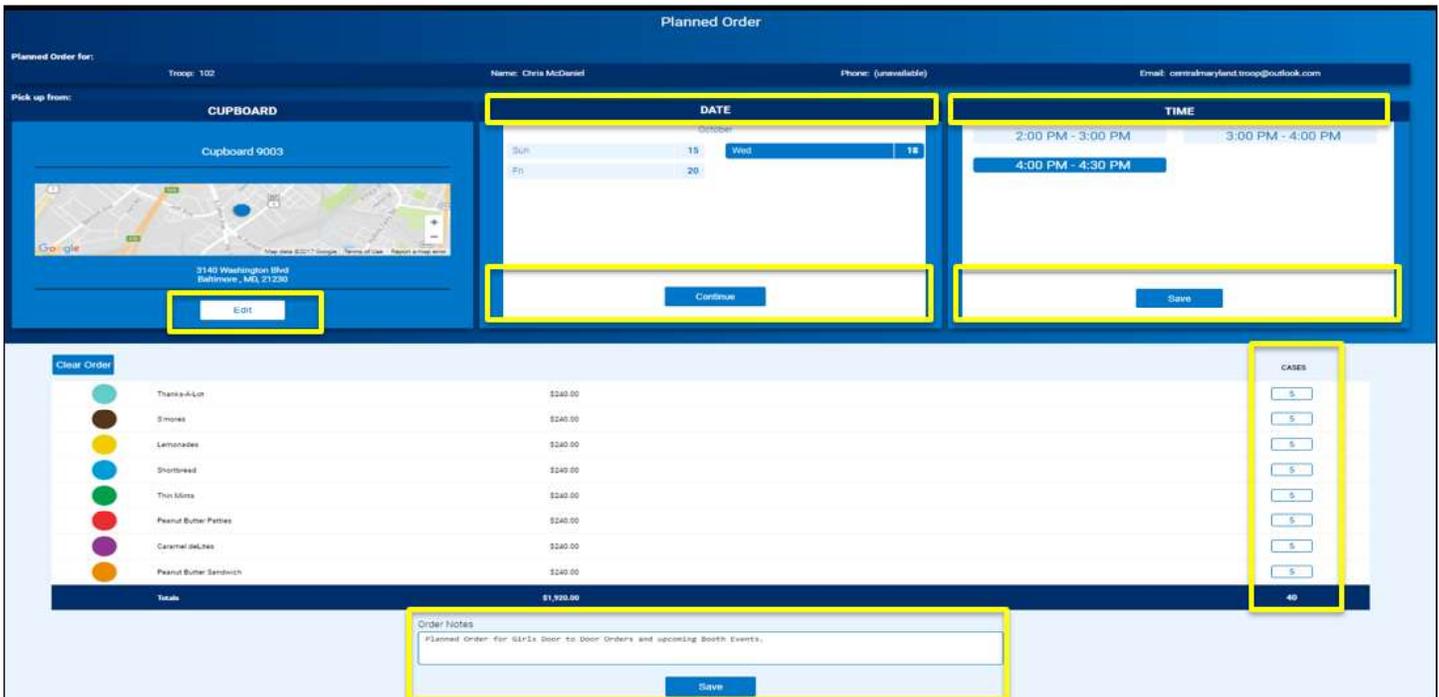
Creating a Planned Order

View this video: [Creating a Planned Order- YouTube Video](#) or follow the instructions below:



Log into Smart Cookies and navigate to Orders>Planned Order. Be sure to enter all planned orders by the cut-off date outlined by your Council.

Select the cupboard for pick up. Then select the date and time for pickup. Enter the order in cases or packages as determined by your Council. Unit of measure will display just above the boxes for quantity. Enter any notes in the notes field and click save.



After Pick-up: After your Troop has picked up the cookies from the cupboard, the cupboard manager will approve and the order will be converted to a transfer. Then the Troop volunteer will receive an email receipt.



Quick Bites

Smart Booth Divider – Single Booth

Watch this video: [Smart Booth Divider - YouTube Video](#) or follow the steps below.

Log into Smart Cookies and navigate to Booths>My Reservations. Locate the booth you will divide and click the three dots to open the menu. Click Smart Booth Divider.

DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
Saturday, Feb 04	03:00 PM - 06:00 PM	<input checked="" type="checkbox"/>	FCFS	Booth Details Smart Booth Divider Remove Reservation		
Sunday, Feb 26	03:00 PM - 06:00 PM	<input type="checkbox"/>	FCFS		0	0

Enter the number of packages sold by variety and click Save and Distribute Sales.

Booth Summary (Packages)

Royal Farms
1114 Rt 3 N
Gambrills MD, 21054
Saturday, February 04
03:00 PM - 06:00 PM

Total Left to Distribute: **0**

Total Distributed: **0**

Total Sold: **0**
\$0.00

You MUST distribute all the packages sold to the girls in your troop.

Clear All

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
0	16	6	12	8	45	36	12	1	2

Save and Go Back | Save and Distribute Sales

Select the girls who will receive booth credit and click Continue. The packages are evenly divided by variety for each girl. Distribute any leftovers as desired between girls and click save.

Select Troop Girls

Select Girls from your Troop to distribute the cookies sold.

- Allison Thomas
- Autumn Cook
- Caitlin Blackwelder
- Maryssa Backstrom
- Moir Healy
- Natalie Shepard

Cancel | Continue

4 Girls

GIRL NAME	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	PACKAGES SOLD
Allison Thomas	0	4	1	3	2	11	9	3	0	0	33
Autumn Cook	0	4	1	3	2	11	9	3	0	0	33
Caitlin Blackwelder	0	4	1	3	2	11	9	3	0	0	33
Maryssa Backstrom	0	4	1	3	2	11	9	3	0	0	33
Packages left to Distribute	0	0	2	0	0	1	0	0	1	2	6
Troop Total	0	16	4	12	8	44	36	12	0	0	132

Cookies allocated to girls using the Smart Booth Divider will be shown on the girl dashboard under Booth and will not add financial responsibility for the girl. Cookie Share packages reported on the Smart Booth divider are credited to girls as Cookie Share sales and a virtual Cookie Share order will be created for the Troop. No additional steps are required.



Quick Bites

Smart Booth Divider – Distributing All Booths

Watch this video: [Smart Booth Divider - YouTube Video](#) or follow the steps below.

Log into Smart Cookies and navigate to Booths>My Reservations. Locate a booth reservation and click the three dots to open the menu. Click Smart Booth Divider.

DATE	TIME	PREMIUM	TYPE	STATUS	QTY SOLD	TOTAL \$
Saturday, Feb 04	03:00 PM - 06:00 PM	<input checked="" type="checkbox"/>	FCFS	Booth Details Smart Booth Divider Remove Reservation		
Sunday, Feb 26	03:00 PM - 06:00 PM	<input type="checkbox"/>	FCFS		0	0

Enter the number of packages sold by variety and click Save and Go Back. Repeat for each booth reservation.

Booth Summary (Packages)

Royal Farms
1114 Rt 318
Crownsville MD 21054
Saturday, February 04
03:00 PM - 06:00 PM

Total Left to Distribute: 0
Total Distributed: 0
Total Sold: 0
\$0.00

You MUST distribute all the packages sold to the girls in your troop.

Clear All

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC
0	16	6	12	8	45	36	12	1	2

Save and Go Back | Save and Distribute Sales

Once all booth location totals have been entered scroll to the bottom of the page and click Distribute Total Booth Sales.

CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS
0	16	6	12	8	45	36	12	1

TOTAL BOOTH SALES: \$692.00 | TOTAL PACKAGES SOLD: 138

Distribute Total Booth Sales

Select the girls who will receive booth credit and click Continue. The packages are evenly divided by variety for each girl. Distribute any leftovers between girls and click save. You can also edit allocation to each girl as desired as long as all varieties are distributed.

Select Troop Girls

Select Girls from your Troop to distribute the cookies sold. All

Search

- Allison Thomas
- Autumn Cook
- Caitlin Blackwelder
- Maryssa Backstrom
- Moirra Healy
- Natalie Shepard

Cancel | Continue

4 Girls

GIRL NAME	CShare	ADV	TY	LEM	TRE	TM	PBP	CD	PBS	GFC	PACKAGES SOLD
Allison Thomas	0	4	1	3	2	11	9	3	0	0	33
Autumn Cook	0	4	1	3	2	11	9	3	0	0	33
Caitlin Blackwelder	0	4	1	3	2	11	9	3	0	0	33
Maryssa Backstrom	0	4	1	3	2	11	9	3	0	0	33
Packages left to distribute	0	0	2	0	0	1	0	0	1	2	6
Troop Total	0	16	4	12	8	44	36	12	0	0	132

Cookies allocated to girls using Smart Booth Divider will display on the girl dashboard under Booth and will not add financial responsibility for the girl. Cookie Share packages reported on the Smart Booth divider are credited to girls as Cookie Share sales and a virtual Cookie Share order is created for the Troop. No additional steps are required.



Quick Bites

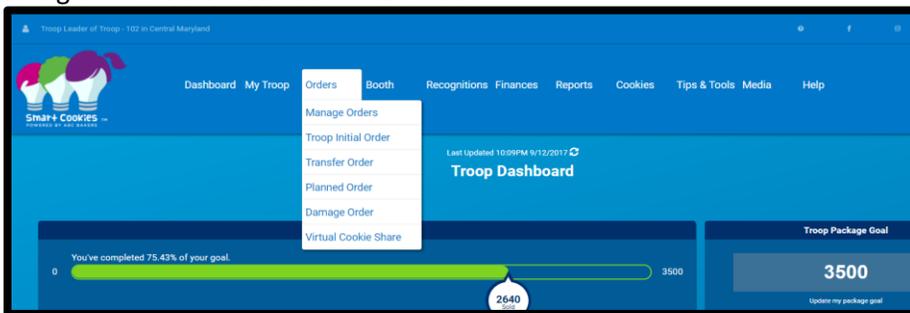
Just In Time – Girl Delivery Cookie Share Orders

When girls receive cookie share orders via Digital Cookie for girl delivery or from in person sales, the troop level volunteer must create the transaction in Smart Cookies for the girl to receive credit for the sales. NOTE FOR ORDER TAKING COUNCILS – any Cookie Share orders received during the initial order period will post to the troop initial order. Follow these steps for orders after the initial order.

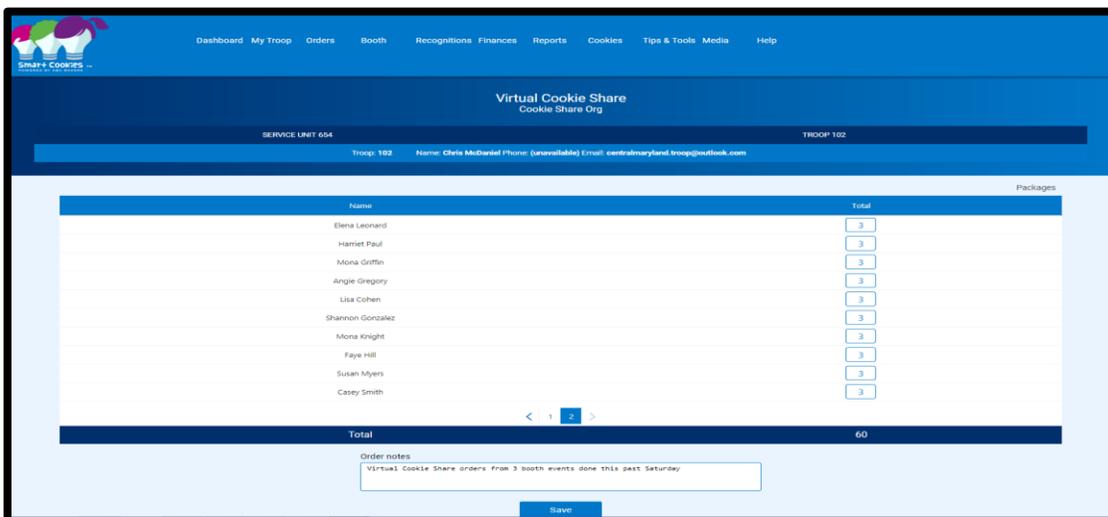
Troop volunteers can check the All Order Data Report on their troop dashboard in Digital Cookie to view any cookie share orders that need to be entered for a girl. Cookie share cookies can be found under order type In-Person Delivery with Donation, Cookies in Hand with Donation or Donation. For cash orders, be sure to collect the payment and post in Smart Cookies.

To enter a Cookie Share sale for the girl, watch this video [Virtual Cookie Share Order- Order Taking Sale](#) or [Virtual Cookie Share Order-Direct Sale](#) follow the steps below:

Navigate to Orders>Virtual Cookie Share



Enter the number of packages of Cookie Share cookies sold by each girl. The unit of measure is packages. Click Save. Cookie Share cookies will display on the Girl Dashboard and financial responsibility for these packages will be assigned to the girls.



NO ACTION IS NEEDED FOR ANY DIRECT SHIP ORDERS THAT INCLUDE COOKIE SHARE AS PART OF THE ORDER (EXAMPLE CUSTOMER ORDERS 2 TM AND 2 COOKIE SHARE). NO ADDITIONAL ACTION IS NEEDED FOR COOKIE SHARE COOKIES ALLOCATED TO GIRLS USING THE SMART BOOTH DIVIDER PROCESS.



Quick Bites

Reconciling Reporting in Digital Cookie and Smart Cookies – Troops

Digital Cookie provides a detailed report outlining all sales made through the digital platform for both girl and Troop linked sales. Smart Cookies provides much of the same information in both Excel and PDF format. Listed below are reports to run to compare data in Digital Cookie and Smart Cookies.

Ship Only Sales:

Digital Cookie	Smart Cookies
All Orders Report filtered for Shipped and Shipped with Donation. Will show orders from Troop and girl links.	Direct Ship Orders Report Will show orders from Troop and girl links.

Girl Delivery Sales

Digital Cookie	Smart Cookies
All Orders Report filtered for girl names only (delete any order with last name "Site"). Filter for all order types except Shipped and Shipped with Donation.	Girl Cookie Order Detail Report filtered for Girl Delivery. Will show all orders and will subtotal by variety and girl as well as Troop total.

Cookie Share Sales

Digital Cookie	Smart Cookies
All Orders Report filtered for girl names only (delete any order with last name "Site"). Filter for In Person Delivery with Donation, Cookies in Hand with Donation and Donation.	Girl Cookie Order Detail Report filtered for Girl Delivery. Will show all orders and will subtotal by variety and girl as well as Troop total. Remember Cookie Share (donation) cookies must be entered for each girl to give girls credit for all sales.

Troop Site Sales - Delivery

Digital Cookie	Smart Cookies
All Orders Report filtered for Troop XXX (first name) and Site (last name). Filter for In Person Delivery, In Person Delivery with Donation and Donation.	Navigate to Booths>My reservation. All orders during the sale will post in the Virtual Booth reservation. Distribute packages to girls using the Smart Booth Divider.

Troop Site Sales – Pick Up

Digital Cookie	Smart Cookies
All Orders Report filtered for Troop XXX (first name) and Site (last name). Filter for Pick Up.	Run the Booth Credit Card Payment Export Report. Add all packages sold via pick up to the totals sold at the walk-up booth location and allocate via Smart Booth Divider.

Troop Site Sales - Shipped

Digital Cookie	Smart Cookies
All Orders Report filtered for Troop XXX (first name) and Site (last name). Filter for Shipped and Shipped with Donation.	Navigate to Orders>Troop Ship Orders. Be sure to distribute all packages to girls before the end of the sale.



Quick Bites

Season Close Out – Troop Check list

Use these steps to close out your Cookie Program season.

1. Run the Girl Cookie Order Detail Report filtered for girl delivery.
 - a. Ensure that you have given each girl enough inventory to cover orders paid through Digital Cookie.
 - b. Review the total of all Cookie Share packages for each girl. Create a virtual Cookie Share order for any missing amounts. You must create these orders for the girl to get credit for the sales and to match financial transactions.
2. Complete any remaining Troop to Girl transfers. If the Troop has excess inventory at the end of the sale, Girl to Troop transfers for BOOTH packages can be created to zero out inventory.
3. Post all girl payments turned into the Troop.
4. Post all packages sold at booths in each booth reservation. Use the Smart Booth Divider to allocate to girls.
5. Review Troop Ship only orders (Orders>Troop Direct Ship Orders) and allocate packages to troop girls.
6. Review the Virtual Booth reservation under Booths>My Reservations. Allocate packages to girls using the Smart Booth Divider. These are orders that were generated using the troop delivery link.
7. Run the Girl Cookie Totals Summary reports to ensure that all girl total sold quantities are correct.
8. Create Recognition Orders
 - a. Create the main order (Rewards>Create Recognition Order -select Main).
 - i. Review the order and ensure that all choices are complete.
 - b. If your council offers a Troop Reward program, create the troop order (Rewards>Create Recognition Order – select Troop).
9. Run the following reports for Troop records.
 - a. Troop Balance Summary (or Troop Balance Summary Snapshot)
 - b. Girl Balance Summary for each girl
 - c. Recognition Order Summary by girl (to use to distribute rewards)
10. Report any outstanding debt or issues to your Council as directed.



Quick Bites

Season Close Out – Service Unit Check list

Use these steps to close out your Cookie Program season.

1. Run the Troop On-Hand Inventory Report.
 - a. Ask Troops to distribute remaining inventory to girls.
 - b. If any Troops show a negative balance for inventory, tell them to review all transfers to girls and correct any errors.
2. Run the Direct Ship Orders report for all Troops.
 - a. Filter for order type “Troop” and ensure all orders have been distributed. Advise Troops to distribute to girls. The Service Unit Cookie Manager may also distribute by mimicking the Troop leader.
3. From the Service Unit dashboard click the link for a list of Troops with no main recognition order. Contact Troops to ask them to create the order or create an order for the Troop.
4. From the Service Unit dashboard, click the link for a list of Troops with incomplete recognition orders. Contact Troops to advise them to complete the order or edit the order to correct errors as directed by your Council.
5. If your Council offers a Troop recognition program, ensure all Troops have created an order or create for them.
6. Manage Recognition Orders
 - a. Ensure all orders are complete by checking that status shows as “Complete.”
 - b. Filter for Main Orders, click box in upper left blue bar to select all main orders.
 - c. Submit all Main Orders. Status will change to “S” when complete.
 - d. If your Council has a Troop Reward plan, filter your recognition order for Troop.
 - e. Click the box in the upper left blue bar to select all Troop orders.
 - f. Submit all Troop recognition orders. Status will change to “S” when complete.
7. Run the Recognition Order Summary by Troop report and keep to help in distributing recognitions.
8. The contact listed on the SU information page will be the person listed for shipment of rewards. If another person will accept shipment, please update the SU Information page with the new name and address.
9. Optional: Run the Troop Balance Summary Snapshot report for all Troops in your Service Unit and keep you’re your records.