

# Smart Cookies Manual for Volunteers

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

- Troop Set Up and Managing Girls
  - Troop Set Up
  - Managing Girls
- Ordering Cookies
  - Troop Initial Order - in Packages
  - Planned Orders – in PACKAGES
- Booth Sales
  - Troop-Secured Booth Locations
  - Adding Additional Times to Booth Locations Already Entered in Smart Cookies
  - Premium and Non-Premium Council–Secured Booths
  - First Come, First Serve
  - Reviewing Council Sponsored Booths and Troop Secured Booths
- Smart Booth Divider
  - Editing the Smart Booth Divider
- Transfers
  - Troop to Girl Transfers (T2G)
  - Troop to Troop Transfers (T2T)
  - Girl to Girl Transfers (G2G) - Within the Same Troop
  - Cupboard to Troop Transfers (C2T)
  - Troop to Cupboard Transfers (T2C)
- Credit Card Payments
  - How Do We Accept Credit Cards?
  - Credit Card Payments for Girl-Delivered Orders
  - Credit Card Payments for In-Person Orders
  - Viewing Data for In-Person Orders – Smart Cookies Reconciliation
  - Credit Card Payments for Booth Sales
  - Viewing Data for Booth Orders – Smart Cookies Reconciliation
- Tracking Finances
  - Girl Transactions
  - Troop Transactions
- Cookie Share
  - Virtual Cookie Share
  - Logging Virtual Cookie Share using the Smart Booth Divider
  - Troop Cookie Donation
- Troop Proceed Plans, Reward Plans, and Recognition Orders
  - Selecting a Proceed Plan
  - Assigning a Reward Plan to Girls (Troop Level)
  - Creating and Placing the Recognition Order
- Notes

## 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:

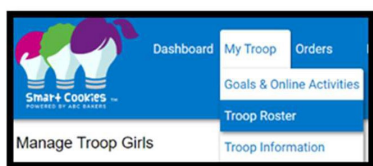


- Hover over the My Troop tab at the top of the screen, click Troop Information. Level – This shows the Girl Scout program level for your troop (Daisy, Brownie, etc.). If your troop includes multiple levels, choose “Group.” Proceed Plan – for full details on Troop Proceeds and Rewards Plans, see page 27. Opting out of rewards is reserved for Junior troops and above. Troops need to decide together if they are going to opt out of rewards and instead receive additional proceeds. Troops who opt out of rewards will still earn patches.
- **Bank Account and Bank Routing - Troops will need to include their troop banking information before the end of the cookie program.**
- Click Update Information.

## Managing Girls

Girl Scouts in the Heart of PA 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 complete this [Add a Girl Request Form](#). 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	
Q	Q	Q	Q	Q	Q	Q	Q	Q	
DM Metro	Des Moines	99999	Sam	Digmann		Five			

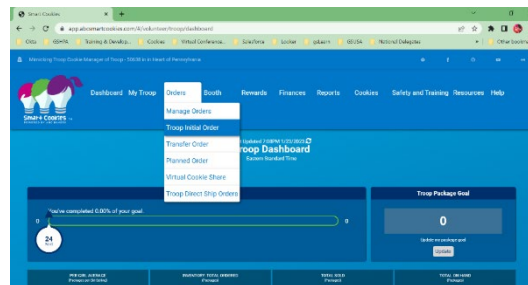
- Grade Level – shows grade level of individual girls
- Shirt Size - Please enter each girl's t-shirt size in the event she reaches the appropriate package level and earns a t-shirt or sweatshirt. This is the size that will be ordered for her, unless a different selection is entered when placing the Recognition Order. NOTE: Troop Cookie Chairs 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.

- 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 in the Heart of PA. Please contact us at [MemberServices@gshpa.org](mailto:MemberServices@gshpa.org) for contact information updates.
- Click Save.

## Ordering Cookies

### Troop Initial Order - in Packages

1. From the Troop Dashboard, Click on Orders, Troop Initial Order



2. Click the down arrow for each *Girl* to show cookie varieties. Input amount of packages. Best practice: Click Save after each *Girl*.

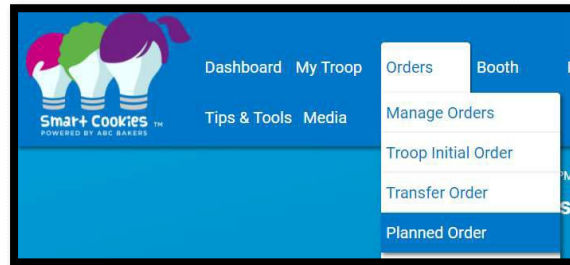
Cookie Variety	Quantity	Package
Thin Mints	12	1
Chocolate Chip	12	1
Vanilla	12	1
Chocolate	12	1
Thin Mints	12	1
Chocolate Chip	12	1
Vanilla	12	1
Chocolate	12	1
Thin Mints	12	1
Chocolate Chip	12	1
Vanilla	12	1
Chocolate	12	1

3. TCC's can order packages for Cookie Booths by clicking on the down arrow for *Booth*.
4. The *Extra* line will automatically populate how many packages *Girls* have leftover in a case. For example, if a *Girl* sold 11 packages of Thin Mints, the Thin Mint line will have a 1 since there are 12 packages per case.

## 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 by 11:59 PM on Sunday.

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.
4. Select the desired pick up time and click Save.

 A screenshot of the 'Planned Order' selection screen, divided into three main sections: 'CUPBOARD', 'DATE', and 'TIME'. 
 - The 'CUPBOARD' section lists two options: 'SuperCupboard- Des Moines' (10400 Hickman Rd Ste 12, City Unavailable, IA 50325) and 'Rolling-Carroll at HyVee' (905 US Highway 30 W, Carroll, IA 51401). A 'Continue' button is at the bottom.
 - The 'DATE' section shows a calendar for February with dates 13, 14, and 15. A 'Continue' button is at the bottom.
 - The 'TIME' section shows a grid of time slots from 8:00 AM to 6:00 PM. A 'Save' button is at the bottom.

5. Enter your quantities in PACKAGES by variety and click Save.
6. You will receive a notification at the bottom the screen that your order was successfully submitted.

 A screenshot of the bottom portion of the order submission screen. It features an 'Order Notes' text area with the placeholder text 'For Booth This Weekend'. Below the text area are 'Print Receipt' and 'Save' buttons. At the very bottom, a green checkmark icon is next to the message: 'Planned order 0000003 has been successfully saved.'

7. 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.
8. 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.)

 A screenshot of the 'Manage Orders' filter screen. It shows a row of filter buttons: 'ALL', 'INITIAL ORDER', 'PLANNED' (which is selected with a checkmark), 'RESTOCK', 'TRANSFER', 'DAMAGED', 'COOKIE SHARE', and 'DIRECT SHIP'. Below these filters is a 'REFINE SEARCH' dropdown menu and an 'Apply Search Parameters' button.

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 [MemberServices@gshpa.org](mailto:MemberServices@gshpa.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 [girlscoutcookies.org](http://girlscoutcookies.org). 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. *\*\*Please make sure that address provided matches the specific business address. Please also make sure that the business and address is capitalized and the spelling is correct. This is how it will appear in Cookie Finder. \*\**



3. Click Save after entering in the booth location and contact information.
4. You will be redirected to the Appointment Times tab where you will request appointment times by selecting Request Appointment Time.

Request Appointment Time				
DATE	TIME	BOOKING STATUS	ACTIONS	
2020-02-07	2:00 PM - 4:00 PM	PENDING	Edit	Delete

[Go to Troop Reservations](#)
[Request Troop Secured Booth](#)

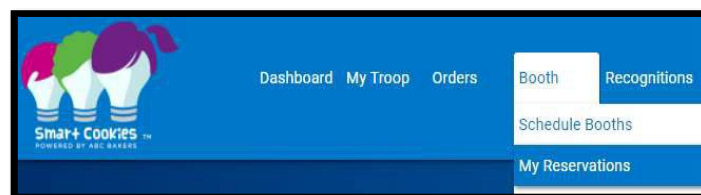
5. Enter the Date, Start Time, and End Time, and click Save.
6. You MUST click Request Troop Secured Booth to finish the process or location won't save. Once requested, you'll receive a notification on the bottom of the screen that says, "Successfully requested troop secured booth."

7. Your request will be sent to Girl Scouts in the Heart of PA for approval. The booth location will say "pending" until the location has been approved.
8. 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.
9. 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.'

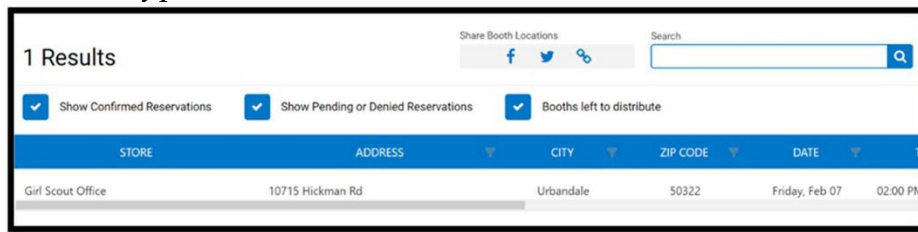
1. To add more time slots to a troop-secured booth location already in the system, go to the Booth tab, and select My Reservations from the drop down.



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.



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."

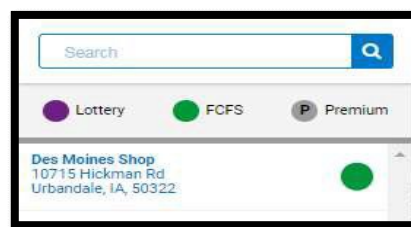
## Premium and Non-Premium Council-Secured Booths

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.

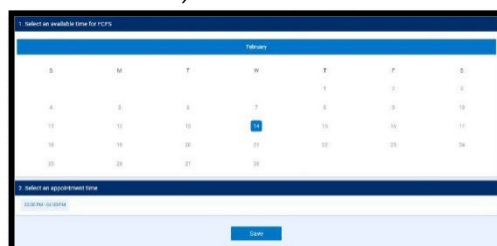


## First Come, First Serve (FCFS)

First Come First Serve are council sponsored booths. Troops will have the ability to select a pre-set number of booths during our specific timeframes.



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).

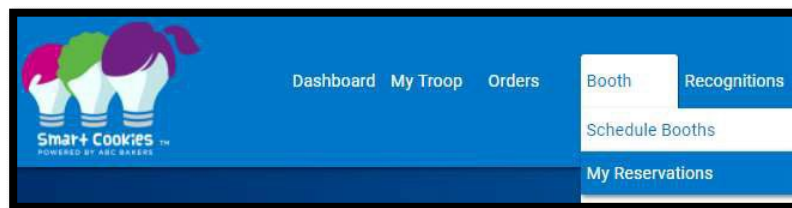




4. Select the desired date.
5. Select the desired time slot.
6. Click Save.
7. Troops will receive a confirmation email from [noreply@abcsmartcookies.com](mailto:noreply@abcsmartcookies.com) when the FCFS booth is accepted. This email will be sent to the Troop Cookie Chair's email address.
8. To review your requested booths, go to the Booth tab and then My Reservations.

## Reviewing Requested Council Sponsored Booths and Troop Secured Booths

1. To review your requested booth sales, go to the Booth tab and select My Reservations.



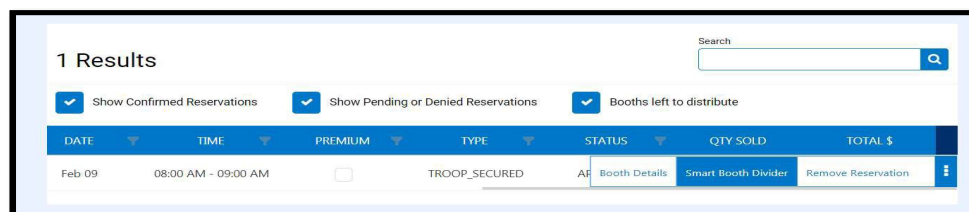
2. Use the Search feature to find the desired booth request or scroll through the list shown.
3. Scroll to the right using the scroll bar under the list of booths to see additional information such as booth type and status.
4. Click the three vertical dots to the far right to view booth details (to add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

## Smart Cookie Divider

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

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	REQUESTED	Booth Details	Smart Booth Divider	Remove Reservation
West Des Moines	50266	Mar 09	05:00 PM - 08:00 PM	<input checked="" type="checkbox"/>	LOTTERY	REQUESTED	0	0	

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.



4. 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.

**Booth Divider**

**Booth Summary (Packages)**

Girl Scout Office  
10715 Hickman Rd  
Urbandale IA, 50322  
Wednesday, September 18  
07:00 AM - 09:00 AM

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	TAL	SMR	LEM	SB	TM	PBP	CD	PBS	GFC
10	0	50	2	7	6	2	1	0	0

Save and Go Back    Save and Distribute Sales

- 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 Troop Girls**

Select Girls from your Troop to distribute the cookies sold during the booth sale.

Search

Peyton Hyman ☒

Sam Digmann ☒

- 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

1. 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.
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.
4. Click the three vertical dots to the far right and select Smart Booth Divider.
5. Make the necessary edits:
  - a. Click Edit Booth Sales if you need to edit the quantities sold during the booth.
  - b. Click Edit Girls if you need to add or remove girls who sold at the booth sale.
6. Click Save.

The screenshot shows a 'Smart Booth Divider' interface. At the top, it displays 'Total Left to Distribute' as 0 and 'Total Distributed' as 78. Below this, a table lists quantities for different categories: SB (50), LEM (2), SB (7), TM (6), and PSP (2). At the bottom, there are two buttons: 'Cancel Distribution' and 'Edit Booth Sales'.

Category	Quantity
SB	50
LEM	2
SB	7
TM	6
PSP	2

## Transfers

### Troop to Girl Transfers (T2G)

A Troop to Girl Transfer order in Smart Cookies needs to be made by the Troop Cookie (TCC) 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.

The screenshot shows a dropdown menu with the following options: 'Orders', 'Booth', 'Re', 'Manage Orders', 'Troop Initial Order', and 'Transfer Order'. The 'Transfer Order' option is highlighted.

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

The screenshot shows a 'Transfer Order' form. The 'TYPE OF TRANSFER' dropdown is set to 'Troop to Girl'. Below this, the 'From' section shows 'SERVICE UNIT Des Moines' and 'TROOP 99999'. The 'To' section has fields for 'SERVICE UNIT', 'TROOP', and 'GIRL'. A 'Reset' button is located at the bottom right.

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.
5. Enter in the quantity of packages the girl sold individually under the Packages column.
6. 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.
7. You may enter in any notes as you see fit in the Order Notes field.
8. Click Save.
9. You will receive a notification at the bottom the screen that your order was successfully saved.
10. You will then have the option to print a receipt, if you would like.
11. 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
4. Apply.

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

5. Enter the quantities in PACKAGES by variety and click Save.

Order Notes

Type here (250 Characters max)

Save

 Print Receipt

6. 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.
7. You will receive a notification at the bottom the screen that your order was successfully saved.
8. 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 TCC.

**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.

### **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 [MemberServices@gshpa.org](mailto:MemberServices@gshpa.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.

Troops and Juliettes can exchange cookies at the cupboard but they CANNOT return cookies to the cupboard.

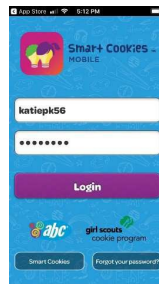
## Credit Card Payments

### How Do We Accept Credit Cards?

1. Smart Cookies: For individual girl orders and for girls AND troops selling at booths:
2. Using a smart phone or desktop, any girl who has created her Smart Cookies account can accept credit card payments for individual girl orders.
3. Using a smart phone or desktop, any girl or troop who has access to Smart Cookies can accept credit card payments 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.

### Credit Card Payments for Girl-Delivered Orders

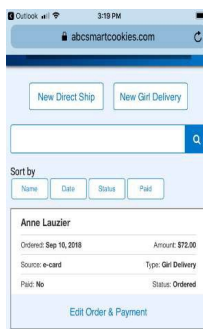
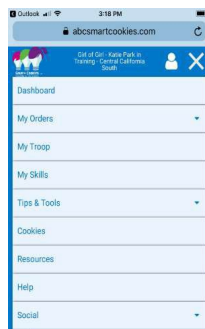
Customers can select to order cookies online but have the girl deliver them instead of paying for shipping. Girls will still need to collect payment at the time of delivery, if they are not already paid for online. Cookies must be marked delivered in order to be able to enter the payment information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



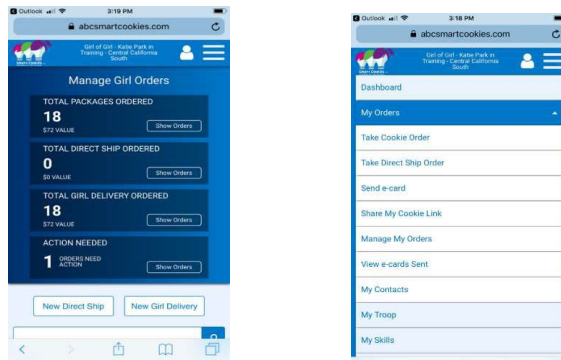
In order to collect a credit card payment:

1. Girls sign into Smart Cookies – app or desktop.
  - a. Log into the Smart Cookies app from your mobile device OR simply login at [abcsmartcookies.com](http://abcsmartcookies.com) and use your desktop.
  - b. 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.

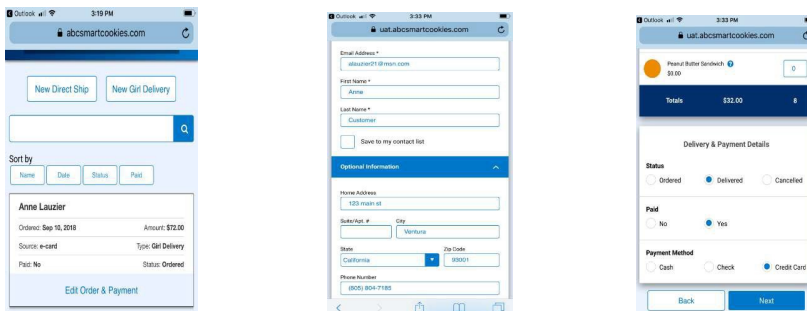
2. Navigate to My Orders



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



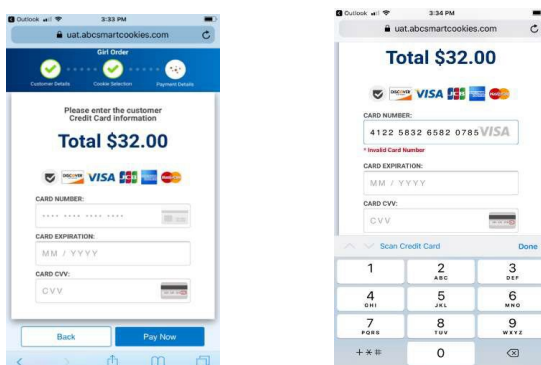
4. Update the order if any changes are required.



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.



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

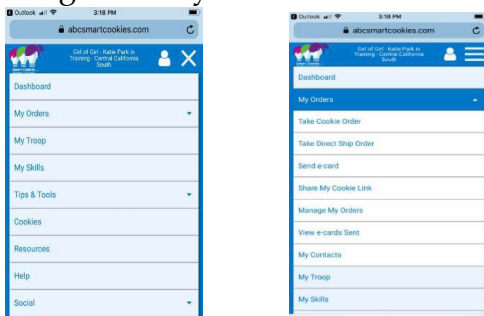


## Credit Card Payments for In-Person Orders

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:

1. Girls log into Smart Cookies – app or desktop.
  - a. Log into the Smart Cookies app from your mobile device OR simply login at [abcsmartcookies.com](http://abcsmartcookies.com) and use your desktop
  - b. 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
2. Navigate to My Orders.



3. Enter customer's contact information.

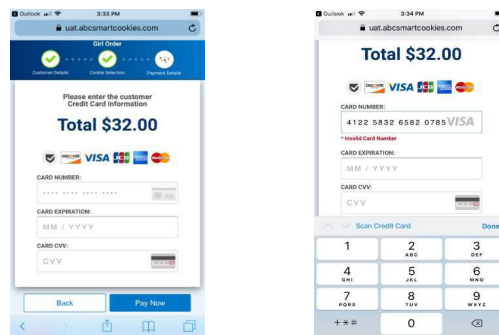
4. Enter the customer's order by variety, in packages.



5. Click Delivered and YES under the Paid section. By choosing Paid, this opens up the payment option screen.
6. Enter in the customer's credit card information!
  - a. 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
  - b. 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.

- c. 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.

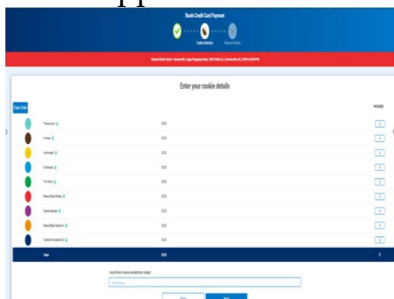
Smart Cookies - POWERED BY ALC BANCORP											
Dashboard Orders Booth Delivery Rewards Finances Reports My Council Tips & Tools Resources Cookies Help											
Manage Financial Transactions											
Troop Transactions Girl Transactions											
Drag a column header here to group by that column											
Locked	Transaction #	District	Service Unit	Troop	Bank	Date	Type	Amount	Ref #		
✓	CT2085247222	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/6/2018	ACH Deposit	\$32.00	549692	🔍	🔒
✓	CT2085455236	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/6/2018	ACH Deposit	\$37.00	549610	🔍	🔒
✓	CT646527028	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/16/2018	ACH Deposit	\$36.00	549858	🔍	🔒
✓	CT703491231	Hickory Service Center	GSCP2P	0	Girl Delivery Credit Card	8/27/2018	ACH Deposit	\$24.00	549817	🔍	🔒
✓	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).

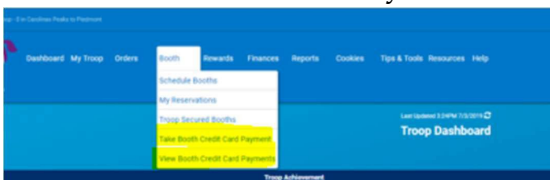
## Credit Card Payments for Booth Sales

There is a feature under the Booth tab in Smart Cookies 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.

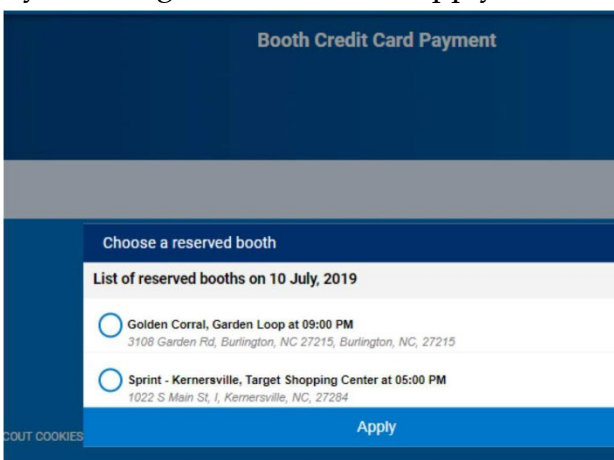
1. Girls sign into Smart Cookies – app or desktop.
  - a. Log into the Smart Cookies app from your mobile device OR simply login at [abcsmartcookies.com](http://abcsmartcookies.com) and use your desktop.
  - b. Here we show screenshots using the app, but all steps are EXACTLY the same when using the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



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



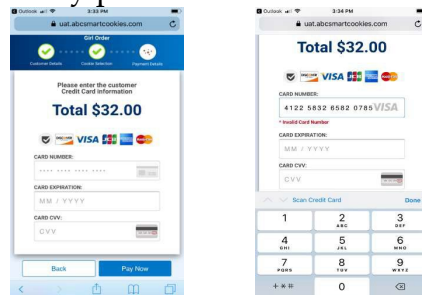
3. Troop assigned booths will for that day will appear, select the correct booth from the list by checking the circle. Click Apply.



4. On the Order page enter the customer's order by variety, in packages. As an option feature, the customer can provide an email for a receipt. Click Next.
5. Enter in the customer's credit card information.
  - a. If you receive an error message, double check that all information was entered correctly.
  - b. 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

- c. 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.

The screenshot shows the Smart Cookies dashboard with the 'Finances' tab selected in the top navigation bar. A dropdown menu is open, showing 'Financial Transactions' as the selected option. Below the navigation bar, the 'Manage Financial Transactions' section is visible, with tabs for 'Troop Transactions' and 'Girl Transactions'. A search bar and a table with columns for Transaction #, District, Service Unit, Troop, Girl, Date, Payment Method, and Amount are also shown.

Manage Financial Transactions

Troop Transactions Girl Transactions

Drag a column header here to group by that column

Search...

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'."/>

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.

Name	Total
Josephine Gibson-Digmann	6
<b>Total</b>	<b>6</b>

Order notes  
Type here (258 Characters max)

Save

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 in the Heart of PA 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 in the Heart of PA 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 TCC assigns one Virtual Cookie Share in Smart Cookies to a girl.

GSHPA will donate Virtual Cookie Share cookies to 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.

### 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 GSHPA 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

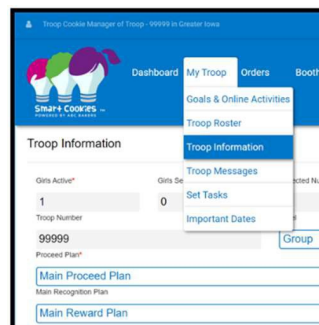
Troops and Juliettes will need to choose from one of two proceed plans. When you select at this level you are deciding whether your troop or Juliette will be opting in to earn rewards or opting out completely to earn additional proceeds. The option to opt out is only available to Junior troops/Juliettes and above. Select from the following proceed plans:

The Main Proceed Plan: This is the default plan. Troops earn troop proceeds and Juliettes earn GO!Dough, plus recognitions and patches.

OR

The Opt Out Plan: Junior troop/Juliettes and above can opt-out of all reward items to earn more proceeds. The girls will still earn all patches. This is a group decision, individual girls within a troop cannot choose this option without the rest of the group.

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

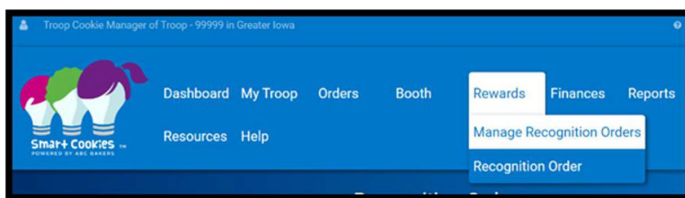


2. Select the desired Proceed Plan from the drop-down. The Main Proceed Plan is the default choice.
3. Click Update Information at the bottom of the screen to save your choice.

## 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.



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 in the Heart of PA 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.



[illegible]