

# 2024 COOKIE CUPBOARD MANAGER HANDBOOK

Cookie Cupboards have the very important role of providing troops with additional cookies for their Direct Door-to-Door, Girl Delivered and Booth Sales.

Along with the *2024 Troop Cookie Manager Handbook*; this is your guide to helping troops with these additional cookie orders.

## SMART COOKIES CONFIRMATION:

To access *Smart Cookies* ([www.abcsmartcookies.com](http://www.abcsmartcookies.com)) you will receive an email with a link to register and set your password.

- » If you have more than one role, make sure your password matches for all roles be able to switch between users while logged into *Smart Cookies*.

First, confirm your information in *Smart Cookies*; use **My Cupboard > Cupboard Information**. Verify that your contact information (especially email), cupboard location, and primary contact information are correct. Also confirm the maximum number of cases the cupboard can hold. Edit where needed and click **Update** Information.



## USE YOUR CUPBOARD DASHBOARD TO SEE:

- » Total Cases Ordered, Transferred and On Hand. The *Inventory Summary* totals ordered/transferred/on hand inventories by each variety.
- » Details for a break down by variety in unit of measure and dollar value.
- » Important Dates and Tasks set by the Council.
- » Messages to and from Council.

## CUPBOARD AVAILABILITY:

Cupboards open for troops, as available, between **FEBRUARY 9 & MARCH 22, 2024**. Cupboard Managers should enter their initial availability in *Smart Cookies* **BY JANUARY 24, 2024**.

To update your cupboard availability for each week, go to **My Cupboard > Cupboard** in *Smart Cookies*. Use the pencil icon to edit your Cupboard information. This is the information you will need to enter:

- » Available Date, Start and End times - these fields are used to create dates and times the cupboard will be open. Click Add Time. The time slot will appear broken down into one hour increments.
- » When Troops place their Planned Orders they will use this to choose a date and hour time frame to pick up their order. **IF DATES AND TIMES ARE NOT ENTERED, THE CUPBOARD WILL NOT SHOW AS AVAILABLE FOR THE TROOPS TO SELECT THAT WEEK.**
- » Troop Planned Order Pick-up Limit allows cupboard manager to determine how many troops OR cases may be picked up within an hour; No Limit is an option.
- » Click on **Limit Type**, Select your option. **Limit Per Hour** will appear, enter the number of cases or troops. Once the limit has been reached, that time slot will not be available to any other troops.
- » Click **Save** when all information has been entered.
- » You can add/delete/change dates and times, please enter them 2 weeks in advance. Dates/times can be deleted by clicking the **X** that follows the date/time.

## CUPBOARD INITIAL ORDER:

**BEGINNING FEBRUARY 1, 2024**, initial orders for your Cupboard will be delivered. Deliveries are in full **CASES** (12 packages per case), but you will record all aspects of your transactions in **PACKAGES**. Count and enter quantities (in **PACKAGES**) on the *M-9 Inventory Control Sheet* and a *Receipt* from a *Receipt Book*. If you are using the *Planned Order Report with Signature* use a *Receipt* from a *Receipt Book*.

## REORDERS:

Reorders are calculated by your Product Program Manager based on the *Planned Order Demand Reports* in *Smart Cookies*. For accurate ordering, Cupboards MUST have Planned Orders approved, and Cupboard to Troop transfers entered before **11:30 PM (MST) ON SUNDAYS**.

Reorder deliveries are coordinated with the delivery agent, and/or Product Program Manager. Reorders are in **CASES**; but will be recorded in **PACKAGES** in *Smart Cookies* for entry on the *M-9 Inventory Control Sheet* and/or a *Receipt* from a *Receipt Book* if you are using the *Planned Order Report with Signature*.

Product Program Managers enter all deliveries to Cupboards in *Smart Cookies*.

## PLANNED ORDERS:

Cupboard Managers can document their Planned Orders and distribution via either the *M-9 Inventory Control Sheet* or the *Planned Order Report with Signature*.

Planned Orders are entered in *Smart Cookies* for additional Direct Door-to-Door, Girl Delivery and Booth Sales.

Planned Orders are ordered in **PACKAGES**.

Troops can enter **ONE** Planned Order per week, by **11:30 PM (MST) ON SUNDAY**, based on a chosen Cookie Cupboard's hours of operation and inventory.

Once entered, Planned Orders cannot be edited or deleted by the troop. **THERE ARE NO RETURNS OR EXCHANGES!**

An adult must sign the *M-9 Inventory Control Sheet*, or printed *Planned Order Summary with Signature* AND a *Receipt* from a *Receipt Book*, accepting financial responsibility for all cookies received.

Troops get the YELLOW COPY from the *Receipt Book*. The WHITE COPY remains in *Receipt Book*.

Once picked up, the Cupboard Manager must approve the Planned Order to add cookies to be available for *Troop to Girl Transfers*, and maintain correct inventories for weekly reorders.

Troops needing additional cookies for active Cookie Booths can contact a Cupboard Manager to determine inventory and availability. These orders are entered by the Cupboard Manager as *Cupboard to Troop Transfer Orders*.

For troops, the *Cupboard to Troop Transfer Order* report is used to calculate total packages received from all Cupboards and Amount Due to Council for the final ACH withdrawal on **APRIL 12, 2024**.

Individual orders can be viewed, edited, deleted or approved by clicking on the icon at the end of the row and selecting the desired action. If all Planned Orders are correct, approve as detailed below.

- » Use the **Apply** button (under **Action**) to batch approve your orders. Filter the Planned Orders to approve using the **Refine Search** feature, then click **Apply** to batch approve Planned Orders. (NOTE: be sure to verify that you have filtered for only those Planned Orders that have been picked up and signed for).

It is very important to approve orders every night after pick up, also confirm that *M-9 Inventory Control Sheet* or *Planned Order Reports with Signature*, *Receipt Books*, *Smart Cookies* AND physical inventory all match. Matching inventory/orders are **VITAL** to calculate restock orders.

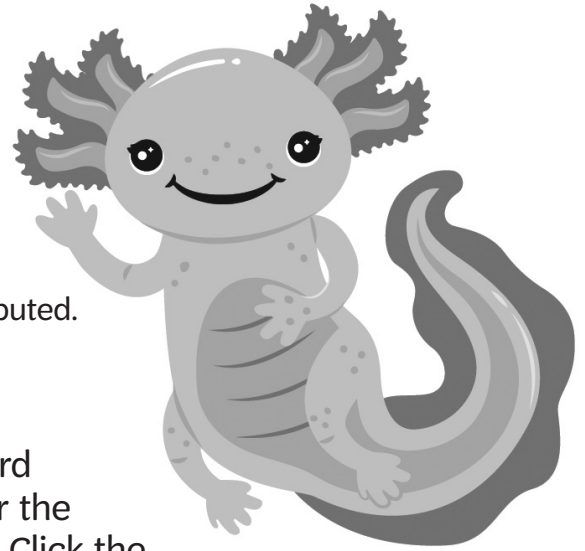
Please, regularly confirm your physical inventory with your Product Program Manager.

## TRANSFER ORDERS:

*Transfer Orders* allow you to create transfer orders for troops who did not enter a Planned Order.

To enter *Transfer Orders*:

- » Click on **Transfer Order** in the **Order** section.
- » Select the **Cupboard to Troop** in the **Type of Transfer** field.
- » Your Cupboard Name will default in the **From** drop-down menu.
- » Enter the 5-DIGIT troop number in the search box at the top, hit **Enter**.
- » Use TAB key to enter number of **PACKAGES** of each variety distributed.
- » From confirmation page a link will allow making another transfer.
- » Click **Save** button.



Once entered, transfer orders can be edited by the Cupboard Manager, through **Manage Orders**. In **Manage Orders**, enter the 5-DIGIT troop number in the search box, click **Apply Filters**. Click the **Pencil Icon**, make changes and click **Save**.

## MANAGE ORDERS:

**Manage Orders** is under the **Orders** tab, it displays all cupboard orders and this information:

- » Planned Orders - shows a summary of troop planned orders that have not yet been approved by the Cupboard Manager.
- » Ordered - shows the net of all inventory brought into the Cupboard.
- » Sold - shows the total inventory that has been transferred to Troops.
- » On Hand - shows what the cupboard currently has remaining in inventory.

Click **Show Transactions** under each section to populate the order grid with the totals in each section.

Check each order type you wish to display.

- » To filter specific transactions, check the type of order then click **Apply Search Parameters**: only that type of order will appear.

The order grid can be filtered even further by clicking **Refine Search** and selecting the desired criteria. Click **Apply Search Parameters** to see your filtered selections.

- » The information can be exported into Excel by clicking on the **Export to Excel** button.
- » For the unit of measure always use **PACKAGES**.
- » You can also search by order number or keyword in the search by and keyword fields.

## DAMAGE ORDERS:

Cupboard Managers will create Damage Orders for damaged packages received from the Delivery Agent or Troops. Create a Damage Order each time damages are received to keep on hand inventory up to date.

- » Click on the **Orders** menu, then click on **Damage Order**.
- » Enter the amount of damaged packages for each variety .
- » Enter any notes in the **Order Notes** box i.e. package open, package crushed, etc.
- » Click **Save** and a confirmation that the order was saved will appear.

## REPORTS:

For a report of all Planned Orders entered for your Cupboard, click on **Reports**. In the **Orders Section** choose *Planned Order Report* and choose **Go To Report**. Your cupboard will automatically populate. Change **Unit of Measure to PACKAGES**. You can specify a date range or simply click **View Report**.

For a report of all Transfer Orders entered for your Cupboard, click on **Reports**. In the **Orders Section** choose *Transfer Order Summary* and click **Go To Report**. Your cupboard will automatically populate. Change **Unit of Measure to PACKAGES**. You can specify a date range, or simply click **View Report**.

To verify your inventory, review/print the *Cupboard Activity Summary* report. This report is located under **Reports** and is generated in real time so you can view the current information for your Cupboard. This report will automatically populate your Cupboard. Change **Unit of Measure to PACKAGES**. You can specify a date range, or simply click **View Report**. Run this report at least once per week (ideally every night after distribution is complete) throughout the program to verify that your *M-9 Inventory Control Sheets, or Planned Order with Signature, Receipt Books* AND physical inventory all match *Smart Cookies*. All must match!

Recommended reports: *Cupboard Activity Summary, Planned Order Report, Total Sales Summary, Transfer Order Summary, Cupboard Initial Order, Cupboard Inventory*.

## AFTER SALE:

Final door-to-door direct and girl delivered sales received by troops before the sale end date must be entered as Planned Orders by **11:30 PM (MST) SUNDAY MARCH 17, 2024**. Cupboards remain available for distribution of these orders, and *Gift of Sharing* through **MARCH 22, 2024**.

Troops who cannot fill their *Gift of Sharing* orders from their own remaining inventory, will get the additional packages needed from a Cupboard. The Cupboard Managers will work with the troop to clear the remaining Cupboard inventory, and enter a final *Cupboard to Troop Transfer Order* for packages distributed.

At the end of the program, after all Planned Orders are approved and all transfers are entered, you will confirm the *Cupboard Order Summary, M-9 Inventory Control Sheets, or signed Planned Order Summary Reports with Signature, Receipt Books* AND physical inventory match.

You will confirm final inventory with your Product Program Manager. Cupboards will submit all *M-9 Inventory Control Sheets, or signed Planned Order Reports with Signature, and Receipt Books* when Cupboard Inventory is cleared, beginning **MARCH 25, 2024**. The Product Program Manager will work with Cupboard Managers to clear their cupboards before **APRIL 5, 2024**.

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