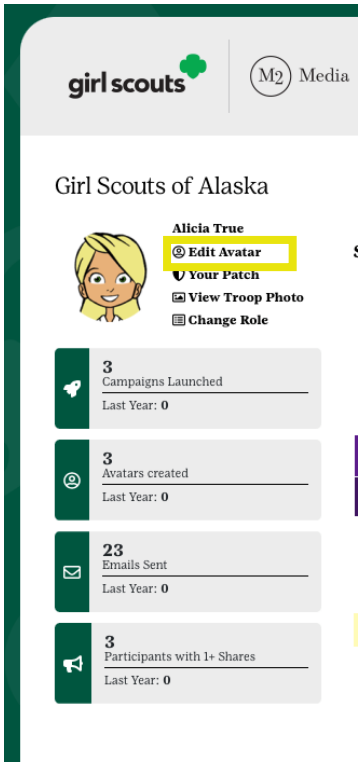
Troops - M2OS Quick Tips

Scan here to access more troop resources:

Review the Family M2OS Quick Tips Guide in addition to this guide. Some of what you will need to know about the troop role overlaps with what families will also need to know. If you are in a Community or Area role, please also review the Community & Area Guide.

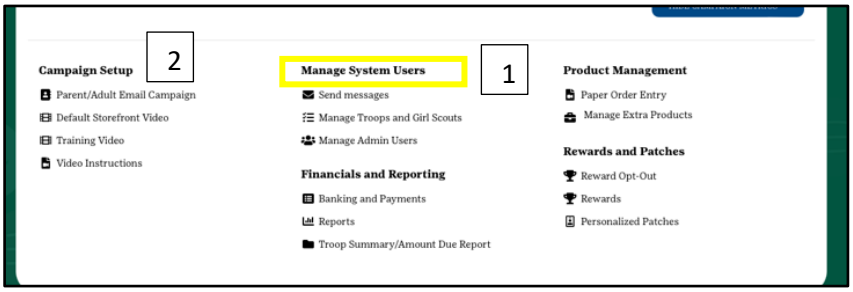
Before the Sale

- Click on the account registration link sent to your email to set up your account
    1. If you did not receive this email, contact Girl Scouts River Valleys
    2. **Note:** These instructions are for setting up your Troop account! Be sure to click the Visit Admin Site button when logging in as a troop volunteer. You will need to access your Girl Scout's account separately, either through logging in or registering under Girls and Parents/Adults.
- Watch the training video as you log in. This video will be on your dashboard to reference at any time



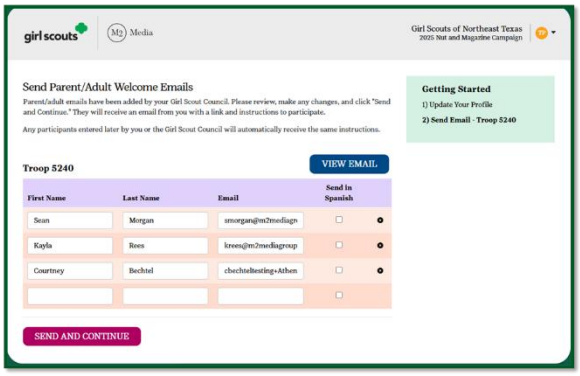
- Create your Avatar
    - You will be prompted to do this when registering your account
    - Or you can click *Edit Avatar* on your dashboard
    - The Girl Scouts in your troop will be able to see your avatar when they check out their troop's group photo in their avatar's Room!
- All currently registered girls in your troop will be uploaded in the system. If a Girl Scout is not listed, remind the family to complete registration

- Check that all members currently in your troop are in M2OS by clicking *Manage Troops & Girl Scouts* [1]. You have two options (either will work, and you do not need to complete both):

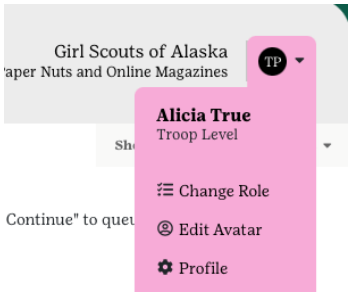


    - Ask your families to register their girl account at www.gsnutsandmags.com/gsrv under your troop number

- Send a registration email to the Girl Scout's parent/adult from M2OS by clicking the *Parent and Adult Email Campaign* icon [2] either when you are first setting up your campaign or later from your troop dashboard. Girl Scouts will receive an email on Go Day inviting them to set up their online account

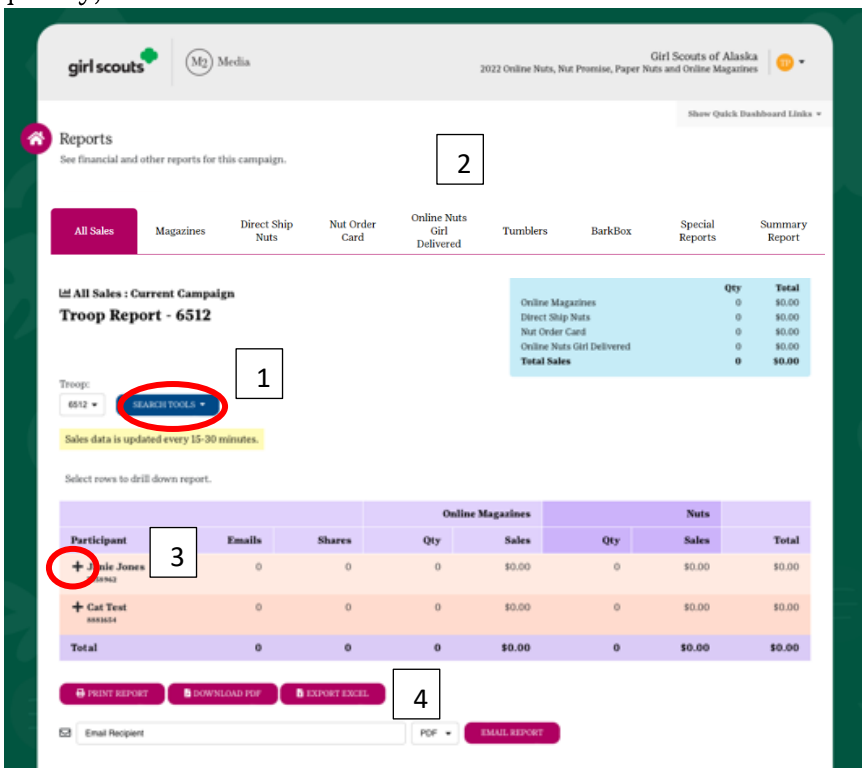


During the Sale



- **Changing Roles:** If you have multiple roles and need to change the troop you are viewing, or change to the parent/adult role, click the drop-down arrow next to the troop number

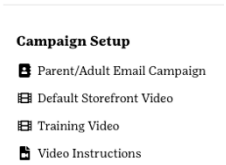
- **Monitoring the Sale:** Check out the Stats bar at the top of your dashboard or view specifics by clicking the reports icon
    1. To search through a long list quickly, click on Search Tools (you will see this option appear on multiple pages of M2OS)
    2. You can also sort the girl's sale by type of sale by changing the tab above the Reports screen
    3. To look at sales details for specific girls, click the plus sign next to their name (when you see these plus signs, they are a signal that there are more options available for that item)
    4. For each report, you are given the option at the bottom of the screen to Print, Download PDF, Export to Excel, or Email the Report as either an Excel or PDF

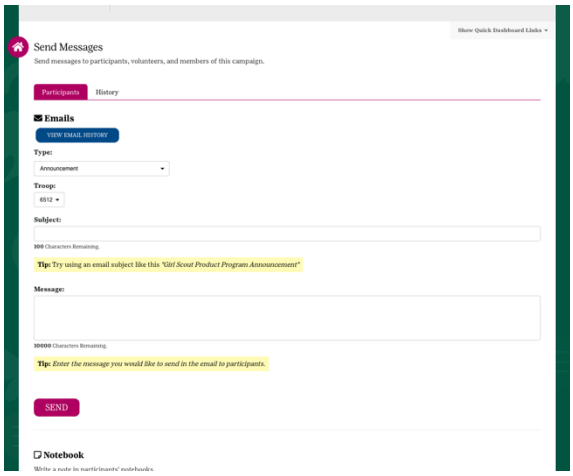


- **Selling:** Snack order card sales will need to be entered in M2OS at the end of the sale by the family or troop. On-line orders are automatically populated into M2OS

- **Promoting the Sale:** Here are some *optional* activities for Girl Scouts/troops who want to take their promo skills up a notch!
    - Encourage Girl Scouts in your troop to create an avatar and make a recording explaining their goals, so that their customers can hear a personalized message from their favorite Girl Scout
    - Make sure girls know about the options to make business cards, door hangers, and fliers on their girl account. The Share My Site Toolkit has many options to promote sales.

- Create a troop video that girls can upload to their Personalized Storefront explaining why your troop is selling and what their goals are! The default video and instructions on creating a video can be found by clicking the icons on your dashboard

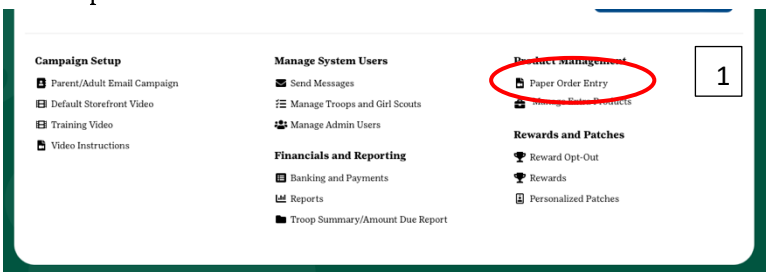




- **Messaging:** You can click the *Send Messages* icon to contact Girl Scouts and volunteers in your troop who have an account in M2OS
  - You can use the email type choices to get sample text for emails you might want to send, or you can send a completely unique email to the entire troop
    - By selecting a specific email type, you will only be sending the message to participants that fall into that category
  - You can also write in Girl Scout's virtual notebooks and set how long the message will stay visible. This is great for things like deadline reminders or patch requirements
    - Messages to the notebook will appear at the top right-hand corner of the girl's home screen in the green box

After the Sale

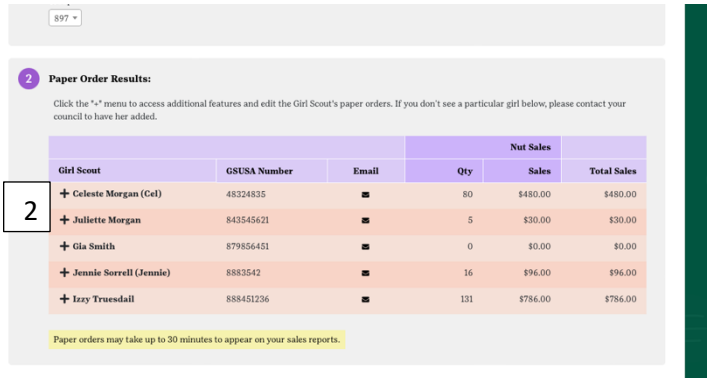
- **Entering snack order card (aka paper orders):**
  - Families who are using the online system will need to enter their Girl Scout's snack order card sales into M2OS before the family deadline
  - Troops can enter or adjust paper orders collected as needed only <u>after</u> the family deadline has passed and before the troop deadline timeframe ends
    - **Only IN PERSON snack order card sales need to be recorded.** All online orders, including girl delivery and shipped orders will be placed automatically. You will not be able to enter orders after the troop deadline
  - To add and review orders:
    - Click the *Paper Order Entry* icon on the Dashboard [1]
    - Locate and select the name of the Girl Scout whose order you need to add or review [2]



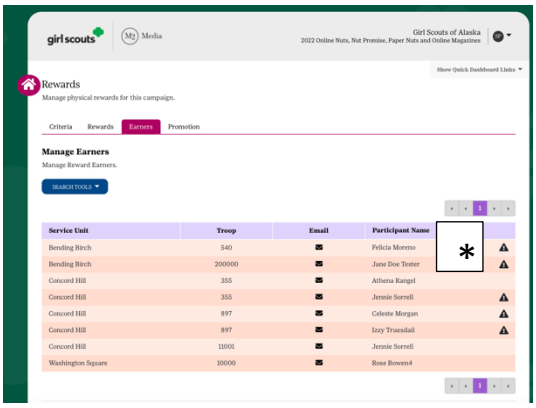
      - ***If the girl is not listed in M2OS at this time, you must contact Girl Scouts River Valleys to have her added to the system***

- Enter or adjust the quantity for each item as needed (these numbers are the cumulative totals for that girl's snack order card sales)
- Be sure to **save** the information entered

  - *Late orders cannot be accepted.*

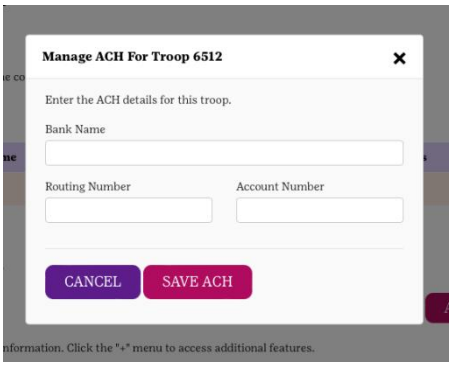


- **Rewards:**
  - After families have had the chance to review the rewards earned by their Girl Scout, they may be required to select one of two items. When they are finished, review these selections to make sure they are correct.
    1. Under Rewards and Patches select *Rewards*
    2. Select the Girl Scout whose rewards you need to review. *A girl that is missing a choice will have an alert near her* name **[*]**
    3. Make changes as needed and click update to save changes
  - You may want to review the status of each girl's progress for earning the Personalized Patch
    1. Under Rewards and Patches select *Personalized Patches*
    2. Select the Girl Scout whose patch status you need to review
    3. Make any changes or updates to the patch or shipment address that are needed and click **save**

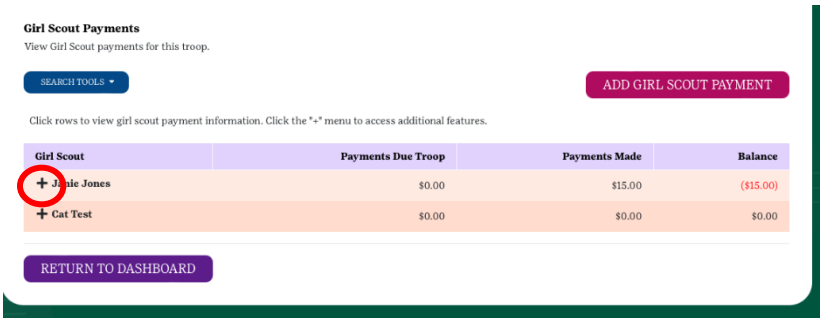


Finances

- Deposit all money collected into your troop bank account
- Update or add your troops bank account information in M2OS
  1. Click the *Banking and Payments* icon
  2. Click *Edit ACH*
  3. Verify that the uploaded banking information is current
- You can also track girl payments from the Banking and Payments screen
  - The Payments Due Troop column will update based on snack order card sales entered for each girl



- Click on the plus sign to the left of a Girl Scout's name to add a payment to her record



Troop Delivery Tickets

- On the M2OS dashboard, go to Delivery Tickets. (The Delivery Tickets icon will appear after the orders have been submitted to the vendor)
    - Under Troop Tickets, the troop should automatically appear. If you manage multiple troops, you will need to arrow down to choose another troop
    - Click on *Create Ticket*. This will generate a PDF to print for your entire troop totals
    - To print individual girl delivery tickets, look for the Girl Scout Tickets section. To print all the girl snack orders, keep the selection at "All" under the Girl Scout
    - Click on *Create Ticket* to generate a PDF you can print and use to sort the snack orders by girl.
- Girl reward delivery tickets can be found under the Delivery Tickets
    - Under the Reward Delivery Tickets, look for the Girl Scout Tickets section
    - To print individual girl reward tickets, keep the selection "All"
    - Click on *Create Ticket* to generate a PDF you can print and use to sort the rewards by girl.

Reports

Click on the **Reports** icon on your dashboard to view the various reports available to you: All Sales, Magazine Sales, Direct Ship Nuts, Nut Order Card, Online Nuts Girl Delivered, Tumblers, BarkBox, Candles, Special Reports, and Summary Report:

Troop Summary Report

Campaign and sales information for your troops.

All Sales | Magazines | Direct Ship Nuts | Nut Order Card | Online Nuts Girl Delivered | Tumblers | BarkBox | Special Reports | Summary Report

Total Sales

Total $ Sold	$0.00
Collected Online	$0.00
Collected from Customers	$0.00
Total Troop Extras	$0.00
Troop Proceeds and Bonuses	$0.00
Amount Due Council	$0.00
Payments Made to Council	$0.00
Balance Due Council	**$0.00**

Online Magazine Sales

Magazine Units	0
Total Sales Collected Online	$0.00
Proceeds And Bonuses	$0.00

Direct Shipped Sales

Campaign Stats

Girls Selling	0
Avatars Created	0
Photos Uploaded	0
Voice Recordings	0
Total Personalized Patches Earned	0
Number Emails Sent	0
Per-Girl-Average Units	0
Per-Girl-Average Dollars	$0.00
Reward Opt Out	No

When using the Special Reports option, you can export many useful reports to Excel. Explore the many report options available to assist you in reviewing girl orders for Fall FUNDraiser items, but also rewards. The Girl Scout Summary Report is very helpful to determine the amount each family owes for their Girl Scout's sales.

Need Help? Contact us!

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800-845-0787
girlscouts@girlscoutsrv.org

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