# 2024 GSEMA Fall Product Program M2 Quick Reference Guide for Service Unit Mentors

#### Registration Email and Setting Up Account

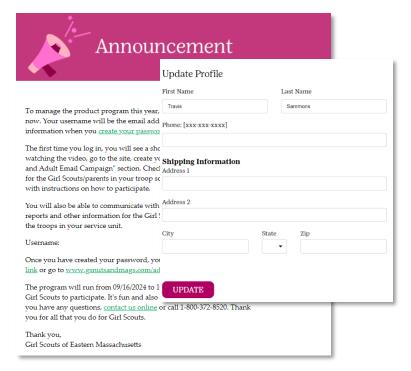
To receive a registration email, you will need to complete the following:

- Register as a Girl Scout volunteer for the 2025 membership year
- Fill out and submit the Service Unit Fall Product Mentor Agreement form

Once all of the above requirements have been met, you will be setup, by GSEMA, in the M2 system and receive a registration email shortly thereafter; see Announcement sample:

Click the link in the email to create your password and make note of the URL for GSEMA and the program begin/end dates. After the password is set, you will then be prompted to update your profile information.

Confirm your name, phone number and address.



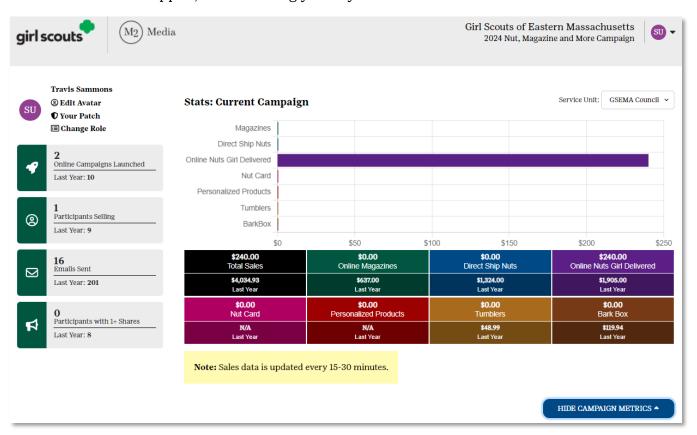
Note: On the "Update Profile" screen, it may prompt you to enter address information in the personalized patch section. This can be accessed from the dashboard by clicking the "Your Patch" link at the top-left, below "Edit Avatar."

It will then have you confirm the delivery addresses for Product and Reward deliveries at the end of the program.

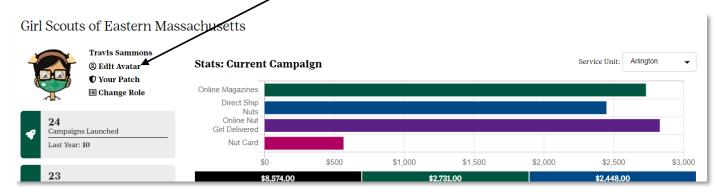
Note: If not known at this time, you can skip these steps and enter them later by clicking "Manage Troops & Girl Scouts" (under "Manage System Users") from the dashboard or the Quick Dashboard links (refer to page 4). Once there, under the "Service Units" tab, click the '+' icon next to the Service Unit name to edit, click "Edit Service Unit," and then click the edit buttons located beneath the previously entered addresses to update the information.



Once confirmed or skipped, this will bring you to your Service Unit dashboard:



It is recommended at this time to click the <u>"Edit Avatar"</u> link in the top-left to create an avatar that all members in your Service Unit can see:

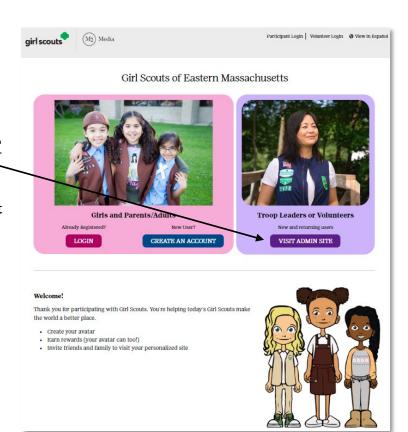


To log into the M2 system, you will go to our custom GSEMA URL:

www.gsnutsandmags.com/gsema

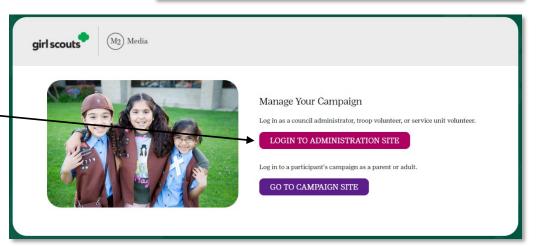
In the "Troop Leaders or Volunteers" box (right, purple box), you would click the "VISIT ADMIN SITE" button to access your Service Unit (SU) account.

Note: Any roles you may have (Service Unit or Troop) are kept separate from the Girl Scout accounts, if applicable. However, if you have multiple Service Units/Troops, they can all be accessed under a single login.



You will be redirected to a new page to access your Service Unit account:

Click the "LOGIN TO ADMINISTRATION SITE" button and you will be prompted to enter the Email address and Password associated with your account.



Note: The email associated is the same

one you used when you submitted your Fall SU agreement to GSEMA and the password associated is the one you created upon initial registration.

Once entered, click the "LOGIN" button and you will either be taken to a screen to select the role you are logging in as currently (if applicable), or you will be taken directly to your Service Unit's dashboard (if no other roles associated).

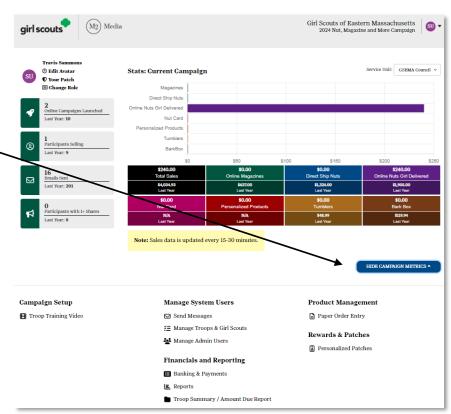
Note: If you have forgotten your password, click the "Forgot your password?" link below the "Password" field and you will be sent a reset password email within a few minutes.

### Navigating the System

Once you are logged into the system, you will see your SU dashboard, which shows you an overall view of your SU's sales progress and links to every function available to SU users in the system:

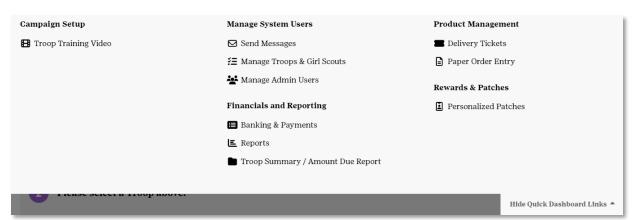
Note: If you navigate to another page and back to the dashboard, during the same session, the metrics at the top of the page will be hidden to help with page loading times. You can also show/hide them yourself by clicking the "Show/Hide Campaign Metrics" button that appears in the top section of the page.

Every page in the system allows you to navigate to any other page very easily. For example, if you navigate to the "Paper Order Entry" page, you will have a "Home" icon that will appear near the top-left of the page and a button, titled "Show Quick Dashboard Links", will appear near the top-right of the page that, when clicked, will give you links to all other pages in the system:





#### "Show Quick Dashboard Links" view (when clicked):



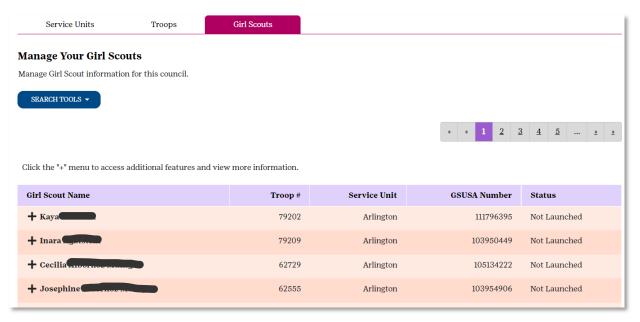


#### Viewing Registered Troops/Girl Scouts in Service Unit

To view all of the troops and Girl Scouts currently registered in your Service Unit, click the "Manage Troops & Girl Scouts" link on the dashboard or in the quick links section. There will be three tabs: one for Service Unit(s), one for Troops, and one for Girl Scouts. The "Service Units" tab will show the Service Units/towns associated with your login, with additional options if you click the '+' sign next to the SU name.

Note: By clicking the '+' sign of the Service Unit and clicking "Edit Service Unit", the page will change to have you edit the Product and Reward (rewards) delivery sites, which is important for having the most accurate information for when delivery occurs after the program ends. This information should be confirmed by October 22 at 11:59 PM.

The "Troops" tab will show all of the troops in those Service Units, with additional options available if you click the '+' sign next to the troop number. The "Girl Scouts" tab will show you all of the Girl Scouts registered to all of your troops, that have been uploaded into the system:



Note: If a troop/Girl Scout is missing that you know has registered for the current membership year, please contact <a href="customercare@gsema.org">customercare@gsema.org</a> and we will look into it. Troop and Girl Scout uploads will be occurring <a href="daily throughout the length of the program">daily throughout the length of the program</a> to ensure all lists are as up-to-date as possible.

From this view, you see their name, associated troop, associated Service Unit, and whether or not they have received a registration email. Below are the meanings of each status:

- Not Launched have not received a launch email to register
- Not Launched Nut Card Only have not received a launch email to register, but quantities have been added to the Paper Order/Nut Card, for the Girl Scout, by a higherlevel user
- **Launched** sent a registration email through Girl Scout upload, Parent/Adult Email Campaign, or manual addition



If you have many Girl Scouts, spanning multiple pages, there is a Search function you can use by clicking the <u>"Search Tools" button</u> below "Manage Your Girl Scouts":

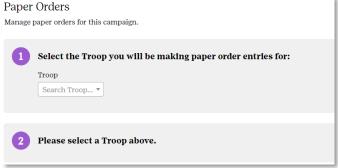


Next to each one of the Girl Scouts' names, there is a '+' icon which gives you additional options, such as viewing their profile and sales report, any payments made (if applicable), and their avatar photo (if they have completed one):



#### **Order Entry**

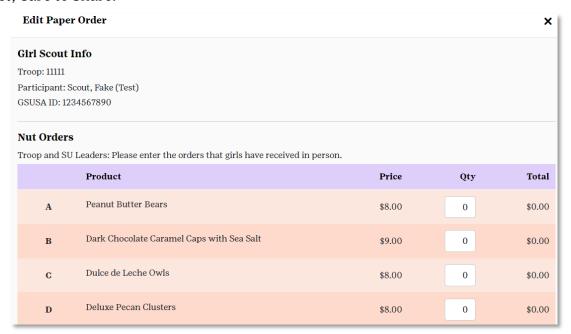
While troops and Girl Scouts are able to add their own in-person/paper orders into the system themselves, you may need to do it as well. To enter those orders, click on the "Paper Order Entry" link on the dashboard or in the quick links (under "Product Management"). You will be directed to a page where you can type in the Girl Scout's troop number for whom you are entering the order (in box #1):



Once you have selected the troop number (by clicking on it or pressing enter/return on the keyboard), all of the Girl Scouts associated with the selected troop will appear in the #2 box:



From here you can see if any information has been entered for them already, in total quantity and total sales. To open and view a Girl Scout's order, click on their '+' icon and select "View Paper Order". A new window will appear showing the products available for entry from the paper order card, which will also include a line item for the Community Caring/donation product, Care to Share:



Enter the quantity of each item sold and when finished, click the "UPDATE" button at the bottom-left; repeat as necessary for each Girl Scout. Orders can be updated up until the SU entry deadline on **October 22 at 11:59 PM**.

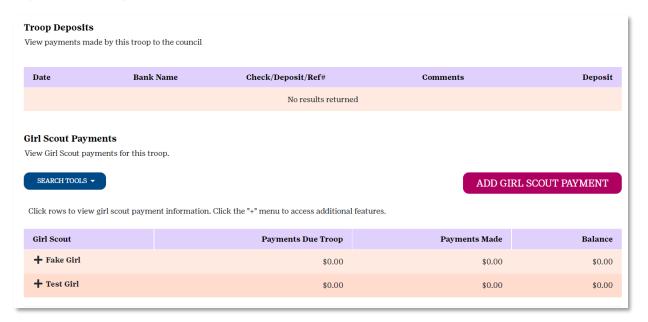
Note: Sales quantities should appear instantaneously on this page, but it may take up to 30 minutes to appear on sales reports.

## Troop and Girl Scout Payments

To view payments made by the troop (to GSEMA) or by Girl Scouts (to the Troop), click the "Banking & Payments" link from the dashboard or quick links. If you have multiple Service Units associated, you will see a page with the list of towns and will select one to see the troops associated with that town:

Service Unit	(	Gross Sales	\$ Collected Online	Total Proceeds & Bonuses		
Arlington		\$8,574.00	\$8,009.00			\$1,286.10
Troop Payments - Service Unit Arlington  View all Troop Payments for this service unit.  SEARCH TOOLS *  Select rows to see payments for a particular Troop, Click the "+" menu to access additional features.						
Troop #	Gross Sales	\$ Collected Online	Total Proceeds & Bonuses	Total Owed	Total Payments	Balance
62555	\$139.00	\$0.00	\$20.85	\$118.15	\$118.15	\$0.00
62571	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
62580	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
62592	\$910.00	\$910.00	\$136.50	(\$136.50)	(\$136.50)	\$0.00

Click the row, which shows the Troop number and high-level sales information, and you will be automatically forwarded to a page showing all of the troop and Girl Scout payment activity throughout the program:

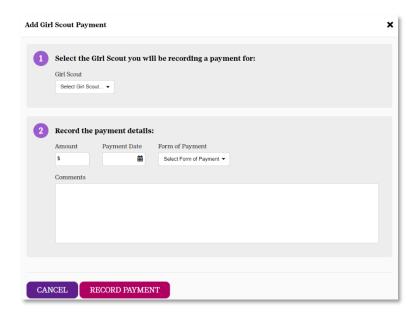


Note: The only activity you will see under Troop Deposits will be the scheduled ACH payment, for 100% of the balance due, being processed on <u>October 31, 2024</u> after all sales are final. These payments are controlled at the GSEMA level ONLY, as they affect the balance due to GSEMA.

Adding Girl Scout payments is recommended, but completely optional. This will help troops keep track of all payments received from Girl Scouts as to keep better records of who owes and who does not. These do not affect the balance due to GSEMA, only the Girl Scout's balance due to the troop, so they are able to add payments as they are received.

To add a payment, click the "Add Girl Scout Payment" button that appears on the right, directly below the "Troop Deposits" section. A window will appear which will prompt you to select the Girl Scout you are recording the payment for, payment amount, payment date, form of payment (cash, check, or credit) and any comments you might have:

Once finished, click the <u>"RECORD"</u> <u>PAYMENT" button</u> and it will appear in the table on the previous page.





#### Reports

There are a few reports available to SU users. To access, you can click the "Reports" link on the dashboard or in the quick links. Across the top of this page are tabs for each of the available reports:



Below is a quick description of all reports:

- **All Sales** shows a high-level summary of total sales, broken down by total magazines, total nuts, and total emails sent, for each individual troop and Girl Scout
  - o By clicking on the individual Girl Scouts, you can see more detailed information about their sales, including what individual customers (supporters) ordered and what has been entered on their paper order card (if entered)

Note: If you click on an individual troop or Girl Scout and move to different reports, you will only see the troop/Girl Scout-level reports until you refresh the page by clicking the "Reports" link from the dashboard or in the quick links.

- By clicking the '+' icon next to the Girl Scouts' names, you have the option of viewing their paper order, which will appear in a new window for you to make edits and save them
- **Magazine Sales** shows a high-level summary of total magazine sales, for each individual troop and Girl Scout
  - o By clicking on the individual troops and Girl Scouts, you can see more detailed information about their magazine sales
- **Direct Ship Nuts** shows a high-level summary of total direct ship (online only) nuts sales, for each individual troop and Girl Scout
  - By clicking on the individual troops and Girl Scouts, you can see more detailed information about their direct ship (online only) sales
- **Nut Order Card** shows a high-level summary of total nut order card (paper/in-person) sales, for each individual troop and Girl Scout
  - o By clicking on the individual troops and Girl Scouts, you can see more detailed information about what they (or you) have entered for their order card nut orders
- Online Nuts Girl Delivered shows a high-level summary of all nuts ordered online and chosen for girl-delivery (no shipping, coordinate with Girl Scout to receive), for each individual troop and Girl Scout
  - By clicking on the individual troops and Girl Scouts, you can see more detailed information about the girl-delivered totals by each product and who their customers (supporters) are
- **NEW! Personalized Products** shows a high-level summary of all Personalized Products (notepads, stationery, etc.) purchased online
  - By clicking on the individual troops and Girl Scouts, you can see more detailed information about the total sales of Personalized Products and who their customers (supporters) are
- Tumblers shows a high-level summary of all Tumblers purchased online
  - By clicking on the individual SU, troops and Girl Scouts, you can see more detailed information about the total sales of Tumblers and who their customers (supporters) are

- **BarkBox** shows a high-level summary of all BarkBox items purchased online
  - By clicking on the individual SU, troops and Girl Scouts, you can see more detailed information about the total sales of BarkBox items and who their customers (supporters) are
- **Special Reports** multiple reports, opened in excel, showing detailed information about all troop and Girl Scout activities engaged in during the Fall Product Program (e.g. sales information, products, financials, etc.), as well as summarized information for the Service Unit
- **Summary Report (VERY IMPORTANT!)** shows high-level summary information about all aspects of the program for the troops in your SU (click the drop-down box under the title, "Troop Summary Report", to cycle through all of the troops):
  - Total Sales section shows all of the financial information, including monies collected, proceeds earned, and the bolded "Balance Due GSEMA" line (amount to be debited on **October 31**)
  - Online Magazine Sales section
  - o Direct Shipped Sales section online nut sales
  - Online Nuts Girl Delivered section all online nuts being <u>shipped to and distributed</u> <u>by Girl Scouts</u>
  - o Nut Card Sales section paper/in-person nut sales entered by troop/Girl Scout

IMPORTANT: At the end of the season when all orders are populated and compiled by our distributor(s), troops/Girl Scouts will receive all nut/candy orders that were entered as <u>nut card sales AND online girl-delivered nut sales</u>.

- Personalized Products section
- o Tumblers section
- o BarkBox section
- o Campaign Stats section shows selling Girl Scouts, avatars created, total emails sent, per girl average (PGA) units/dollars, and other information

Note: All reports, with the exception of the "Special Reports" section, can be printed, downloaded to PDF, exported to Excel, or emailed directly from the system.

Since this is GSEMA's fifth year using M2, some of last year's data is available for comparison. If you need additional prior year information, please contact <a href="mailto:customercare@gsema.org">customercare@gsema.org</a> and we can pull that information for you.