2019 Fall Product Program

2019 M2OS Guide
Service Unit
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Dear Service Unit Fall Product Chair,

Your product programs manager will add you as a user to the M2 Ordering System (or M2OS for short). You will receive an email with a link to set up your user account. Troop Fall Product Chair Agreements (an eForm) should be submitted by September 13. Only those troop fall product chairs who have submitted their form on time will be imported into M2OS. You will be able to manually add any additional troop users after September 18. (Note: girls registered as of September 19 will be uploaded into M2OS by the product programs department the morning of September 26).

The troop fall product chair will send an email to each parent in their troop that includes the link to M2OS. Girls/parents will follow the link to set up the girls’ personalized avatars, import or enter email contacts, and participate in the online portion of the Fall Product Program. Girls whose membership registration occurred on or after September 20 were not part of our girl upload; they can be added by the parent as part of the girl account set up process (see the troop manual for more information).

This guide will take you through what you as a service unit fall product chair will see and do in M2OS.
Log In/Password Creation

Once you have been added to the M2OS system by your product programs manager (PPM), you will receive an email from Girl Scouts of Greater Los Angeles like the one at right. It contains a link to M2OS where you will create a password; and, after logged in, set your delivery location and date, create your avatar, and be able to monitor your nut, candy, and magazine sales throughout the Fall Product Program.

M2OS is also where your troop fall product chairs (TFPCs) will manage their troop’s nut, candy, and magazine sales.

Bookmark/favorite this link – www.gsnutsandmags.com/admin – in your browser as you will use the same link to log in to M2OS each time.

Upon clicking the link in the email, you will see the Set Your Password screen as shown at left. Enter your email address and create a password.

Once you have created your password, you are ready to log in. Select the Login to Administration Site button. Then enter your email address and your newly created password.

(The Go to Campaign Site link is where parents/girls will click to get to the girl/parent login page.)
Next you’ll be asked to update your user profile. Selecting a gender is asked because you – yes YOU! – will be able to create your own avatar. The fun is not just for the girls and troops. When you are finished, click Update.

Entering Delivery Site Information

Next you will be asked to enter your delivery site location and create a pickup schedule. You can skip this step (and come back later, as the system will prompt you to complete it each time you log in), if you do not have your location and/or date confirmed. But if you do have this info confirmed, you can enter it now.

First you will enter the location name and full address and both a contact phone and contact email. This info will present to the troops in your service unit when they print a delivery ticket.

If your PPM has already entered the Delivery Agent and your Product Delivery Date you will see as Step 2, Product Delivery Agent and Pick Up Times, as shown below. Do not fret if you do not; you will be able to come back to this page to set up your schedule (which we will explain further below).

Here you will toggle the Set troop pick-up date and time information. The date should be the same as your delivery date (in most cases; if you are having troops pick up the next day – which is not usual – you can enter that later date). Your start time should be at least one hour (1 hr) after your delivery arrives. So if you have a 6:00am – 6:30am delivery window, your first troop should not be scheduled to arrive until 7:30am. You’ll enter an end time, and, if you want to, block off a period of time for a break (breakfast, lunch or dinner… just incremental pauses).

If applicable, you can enter special instructions in the applicable field (not shown). When done, click Save.
If you are coming back to this section at any point after setting up your profile, and ignoring the prompt each time you log in, then to get back to your Product Delivery Location information, go to Service Unit, Troops and Girl Scouts from your Dashboard, click on your Service Unit, and click edit under Product Deliveries. Make any additions/corrections/updates and click Save.

**Entering Reward Delivery Location**

Next you will need to enter information for where your Rewards will be delivered in January. Enter your – or your Rewards Chair’s – name, the address to which the rewards should be delivered, a contact phone number and email, and any special instructions. When done, click Save and Continue. If you have not yet confirmed where you are going to have your rewards delivered, you can skip this step and return to it later (M2OS will prompt you each time you log in).

**Dashboard**

Provided you have entered your Delivery Location information (both product and rewards), the Dashboard is what you will see first each time you log in.

Just like your troop fall product chairs and the girls in their troops, you will be able to create your own personalized avatar! You see the Edit Me2 link on the left side of the screen; that’s where you’ll go to create your avatar. Beside that is a link that reads Your Patch. We’ll come back to this when we create our avatar.

Below that are four sections that will track how many avatars have been created by girls and troop fall product chairs in your service unit; how many emails have been sent, how many photos uploaded and how many videos have been uploaded.

In the center is where your sales will be tracked – Total Sales, Online Magazines, Direct Ship Nuts, Online Nut Girl Delivered (these are the “promises”), and Nut Card. We recommend that troops enter their nut card orders as individual girl orders in M2OS… and to save time, have their parents do the data entry! All the troop chair and you need do then is review it.

Above these is a graphical representation of your sales. You can also select from the drop down just above the graph “current campaign” (default), “last month” or “last week,” depending on how you want to filter the data.
Before we move to the lower portion of the Dashboard, let’s talk about one more element, which appears at the very top right corner. If you put your mouse over the purple SU circle, it changes color and opens a panel (as shown at right). From here, you can **change the season or role** you are viewing – want to dip back to the previous year’s program season, or do you also manage a troop? Click here to select either one, as applicable. Next, you can also edit your **Me2**, which we will cover shortly. Or you can **update your profile**. If you have a participating Girl Scout, you can also toggle over to her campaign site by clicking **visit campaign area**. Lastly, you can open this panel to **log out** of M2OS.

**Setting Up Your Avatar**

Before we explore the rest of your Dashboard, let’s get your avatar set up. Setting up your avatar is easy and fun! Click on the **Edit Me2** link on your Dashboard, as mentioned, to open a page where you can set all sorts of options for your avatar – skin tone, hair style and color, eye shape, eye color, etc. Scroll left or right through each option and when your avatar is finished, click **Save** (you can go back and edit at any time). Our sample screen shot is for a female SUFPC, but if you’re a male, you will see a male with male-appropriate options. If you click on the Your Patch link on your dashboard (and you’ve created an avatar), you can see a preview of your patch, select the background and include the correct mailing address.

**Dashboard (cont.)**

Having set up your avatar, we’ll now look at the bottom portion of the Dashboard.

You will see four sections: **Manage System Users** (where you manage the troop fall chairs using the system), **Financial & Reporting** (viewing payments and other reports), **Product Management** (paper order entry and, after the product order has been finalized by council, delivery tickets) and **Rewards & Patches** (all the rewards available to girls plus the personalized patch).
Manage System Users

Manage System Users is where you see three options – **Send Messages** (where you can communicate with your troop fall product chairs right from M2OS), **Manage Service Unit, Troops & Girl Scouts** (there are multiple tasks you will do from this page, including setting up your delivery location and schedule), and lastly, **Manage Admin Users** (where you will add other service unit users or troop users).

Click on **Send Messages** when you want to send a quick message to all of your troop fall product program chairs. This has pre-selected categories – **Has Participants Missing Reward Action, Logged In, Message and Not Logged In**. The Logged In and Not Logged In are fairly obvious; you might want to contact the latter so that they get logged in and are able to see what their girls are doing and manage their sale. The first, Has Participants Missing Reward Action, usually comes into play when a reward with a choice has no choice selected. This season, you will need to make sure a T-shirt size has been selected; if no use this messaging option. Message is freeform, so if your message isn’t about logging in, but about another subject relevant to all your troops, use that option. In each case M2 Media has provided sample text for you to use.

**Manage Service Unit, Troops and Girls** has several functions, and we’ll cover each of these, starting with the **Service Unit** tab.

**Service Unit**

As you see in the sample, it is here you can come back and add/edit your Delivery Location, Reward Delivery Location and your Product Pickup Date. The ability to make changes will have a deadline, so there will come a point during the program where these data points will be view only. So, if you didn’t enter your locations or pickup schedule when you first logged in, be sure to do it well before delivery weekend.
Click on the section that shows your service unit name and data, and what you will see will be like that at left. Click edit to edit the applicable section (it will open a form like that seen earlier with **Entering Delivery Site Information** and **Entering Reward Delivery Location**).

If you click on the + next to your service unit name, you will see a few more options – some that appear before the product order is finalized, some appear after. We will cover all of them later in this guide; for now, this where you will access them. Prior to the order being finalized (top), you will see: **View Sales Report**, **Add Extra Products**, and **View Payments**. It is rare – but not improbable – that the service unit will want to order extra product. Note that any extra product the service unit orders will be the responsibility of the service unit (if not transferred to troops who request it); it cannot be returned with the “round up” product that is automatically added to the service unit’s order.

After the order has been finalized by council, you will then see the following options (bottom): **View Sales Report**, **Move Products**, **Replace Damaged**, **Export All Moves** and **View Payments**.

**Troop**

Moving to the **Troop** tab, you will see a list of troops added to the system, whether through council’s upload or added afterward. While there is no action by clicking on the troop, if you click on the + next to the troop number, just as you had some additional options, so will your troop. Prior to the order being finalized by council, troops will see **View Sales Report**, **Add Extra Products** and **View Payments** (top right). (Note: neither the service unit nor the troop can enter extra product after their data entry deadline has passed). After the order has been finalized, troops will see **View Sales Report**, **Move Products**, **Replace Damaged**, **Export All Moves** and **View Payments** (bottom right). The reason that we cover this here is because, if need be, you can assist the troop with these tasks and it is from here that you will effect Troop to Troop transfers that cross service units.
Lastly, there is the **Girl Scouts** tab. Here you can see all the girls in your service unit. If you click on a girl’s name, you will be able to see when the girl was registered (added) to M2OS (most will have the date they were uploaded), when they launched their campaign (when their first email was sent, whether it was just one or 12 or more) and the guardian name and email address. Further, when you click on the **+** you will have additional options – prior to the order being finalized by council, you will see **View Sales Report** and **View Payments**; after the order has been finalized, you will see also **Move Products**, **Replace Damaged**, **Export All Moves** and **View Payments**. You can also **View Me2 Photo** to see the girl’s avatar!

**Manage Admin Users** is the last item in this section of the Dashboard. Need to add another user to the service unit, such as the rewards chair, delivery chair, or the service unit manager? You can, but know here that each person you add will have their own userid (their email address) and password. Further, you can add troop leaders. The troop will have to exist in M2OS, so you’ll need to let your PPM know you have a new troop to add, but otherwise, for an existing troop, you can add additional users. Or delete users, if the need arises where the person who was the TFPC steps down and someone else steps in.

Click on the **Add User** button. It will open a window where you will enter the user’s email address. Once entered, click **Next**. If the user is already in the system (was a troop chair last year, for example, but was not part of our upload) their data will pre-populate. Otherwise, enter their name, gender, and then select their role(s). Click the Service Unit toggle to activate that role and then select the service unit (listed numerically); and/or click the Troop toggle to activate that role and select the troop(s) this user is to be linked to. Then click **Add**.

If you have an existing user, you can add/or remove them from a service unit or troop role by clicking on their name, and either turning off the toggle, or adding an additional service unit or troop to their account. What you will also notice is that you can see when the user last logged in, date and time. And, by hovering your mouse over the TP or SU button, you can see to which service unit(s) or troop(s) they are linked. You will also see which email address is being used. Sometimes login issues are due to a typo in an email address, the troop fall chair used a work email to complete the form, but are checking...
their personal account, etc. If the email address is correct, and they are still having issues, you can click on the + next to their name and either reset the password (it will trigger an email) or generate a temporary password you can send to them to log in.

If nothing resolves the issue, contact your council product programs manager.

Financials and Reporting

In this section you will find all of your troops listed and a summary of their gross sales, proceeds, total owed, total payments and balance due. **DO NOT** use the Add Troop Payments button; only Council will enter payments from the Troop to the council. Troops should be entering only payments made by girls/parents – the funds they collected from their delivery customers (in the form it was given to them by the customer).

If you need to add a payment from a girl to the troop on behalf of the troop, click on the troop to drill down to the next level. You will then see **Add Girl Scout Payment** (we’ve included a handy green check mark to highlight this button, but you won’t see it in M2OS itself). Click Add Girl Scout Payment and it will open a window for you to select the girl the troop received payment from, then enter the amount, the date, bank name (if a check) and the check number (see sample below). When all fields are filled in (memo is optional), then click **Record Payment**.

We’ll say it again, **at no time** should a parent be depositing monies collected from a customer into a personal account and writing the troop a check (or then pay the troop through Venmo or PayPal). What the parent turns over to the troop is exactly what the customers provided. What the troop enters here can be payments for each of the girl’s customers or a lump entry that is the sum of what the parent turned in.

Troops should be entering their received payments often so as to keep up on what their girls owe the troop and to ensure there will be sufficient funds for the ACH debit in early December.
Reports

Sales reports can be found here in Reports, and for those who like to “slice and dice” data, you have some options for doing that. View All Sales to see an overview of each of your troops’ sales (magazines and nuts). Click on a troop to see the overall orders of the girls in that troop. Click on a girl to see each of her orders (by category). If you click on the Online Magazine tab, you follow these same steps to drill down just magazine data; similarly, if you click Direct Ship Nuts, you can drill down just through that data. You will find the same is true for the Nut Order Card tab. You can also select Summary Report and drill down by Troop number to see a summary of each of your Troop’s specific totals.

Lastly, there is the Online Nuts Girl Delivered tab which also allows you to drill down to the girl level. And, guess what! Your troops have this same report. And even cooler yet, so do the girls/parents! They will be able to see exactly who ordered online, asked for girl delivery, and what they ordered. Of course, they’ll have all the same reporting views as described above. (The report will be emailed to the parent, too!)

At left you can see a detailed view of a troop, showing all sales for each girl, as well as a table that includes total sales for the troop. And below right you can see a detailed report for just a single girl’s orders – Online Magazines Sales at the top, then Online Nuts, and Nut Order Card – if she had any Promise orders (online, girl delivery), they would show as well.

For each of these reports, you can Print, Export as PDF or Excel, and you can email the report.
Paper Order Entry

Under the **Product Management** section we find **Paper Order Entry**, which we will highlight as a section on its own (to make it easier to find again in this guide). Paper Order Entry refers to order card orders only. Ideally your troops will have had each parent enter the order for her/his Girl Scout, or that the troop entered for each of their girls (once the parents were locked out). However, if the troop gets locked out (their deadline passes), it may be necessary for you to enter orders for stragglers who missed the troop deadline.

When you click **Paper Order Entry**, you will see initially the girls in the first troop on your list - troops are listed numerically. To select a different troop, click on the drop down and select the troop. The girls in that troop will display.

To edit an order, click on the girl’s name and the screen shown above will display. Enter the girl’s order from her card for each product (sum totals for each variety) and when finished, click **Update**.

If the order was placed, but there was an error that needs to be fixed or product that needs to be added/subtracted, you will be able to edit the order in the same way (only during the ordering period, remember; once the order is sent off to Trophy Nut Co., the order can’t be changed).

You may have a circumstance where you need to zero the order out – for example, if the troop opted to order everything as Troop Extras instead of per girl and the parent also entered individually for her Girl Scout (and the troop has been locked out from making changes). You could zero this order out (making sure the product was included in the Troop Extras). Or the troop or parent entered what was a “promise” order (which doesn’t need to be entered) and the troop noticed after they were locked out... you could go in and adjust or zero out the entry.

Remember, until the troop fall chair’s deadline has passed, you will not be able to add/edit an order. And after your deadline has passed, you will not be able to add/edit an order.
Rewards and Patches

Here is where you can see who has earned the **Personalized Patch** (avatar patch) and what the status is. Remember, these patches will be directly mailed to the participant (except in extremely rare cases when they will be mailed to the troop fall chair).

Troop to Troop Transfers

Troops can enter their own Troop to Troop transfers. They can also reassign product assigned to one girl to another, which includes product ordered from their order card (they cannot transfer online orders – whether girl delivery or shipped). And we cover that in the *Troop M2OS Guide*.

As a service unit fall product chair, you will need to enter any troop to troop transfer that crosses service unit boundaries – that is, if troop A in your service unit transferred products to troop B in a neighboring service unit. You will also need to enter any transfers from your “round up” to the troop requesting it. We will cover both actions in this section since they are functionally the same.

**Important Note:** this functionality will not be active until after the “initial order” has been finalized by council. Refer to your SU Fall Product Guide for timeline.

You will go to the **Manage Service Unit, Troops and Girl Scouts** link from your Dashboard. Select the **Troops** tab.

Select the + next to the troop you are transferring product from (your roundup will be 99xxx – where xxx are the three digits of your service unit (if you are SU 400, it would be 99400, and so forth).

Select the Move Product option. In Step 2 (see images on next page) choose whether you are transferring to a girl (Girl Scout, of course) or a Troop. Most cases you will be transferring to a Troop, so let’s select Troop. A dropdown field will appear (as shown below) where you can select the troop to which you are transferring product. As you type in digits in the search field (see inset), it will list troop numbers that match the pattern – say we are going to transfer to troop 355. We type in 3, and all the troops that begin with 3 will appear; add a 5, and now the 35s appear, and so forth.
Once you find the troop you are looking for, you will be able to transfer the product. You can only transfer product the troop has available. Troops cannot transfer anything that was ordered as part of a “promise” order (online – girl delivered), only those that were entered from their order card orders, troop extras, or a previous troop to troop transfer can be transferred.

Once you have entered the items being transferred, then click Move Products. That’s it; the product is moved from troop A to troop B.
Accessing M2OS During The Sale

To conclude our overview of M2OS, let’s review how you will return to M2OS during the course of the sale. If you have not bookmarked or favorited the link www.gnutsandmags.com/admin in your browser (Microsoft Internet Explorer, Microsoft Edge, Chrome, Safari, etc.) – which we strongly recommend – you can get there by first going to GSGLA’s website at www.girlscoutsla.org.

1. Click on the Cookies+ tab at the top of the page
2. Select the Fall Product Program from the menu at the right of the screen

You will then see the Fall Product Program main page, shown below. You can then either click the text below the graphic or the subject header itself (as indicated by the red arrow in the image below), which will expand that content area (see inset). At the bottom is the link to M2OS.
Once you click the link, you will be taken to a “pre-login” page (your troop fall chairs and parents will as well) – as shown at left. As we mentioned when talking about Log In and Password Creation, clicking the Go To Campaign Site button will take parents to this log in screen. We revisit this in the Troop M2OS Guide when talking about the Girls/Parents experience.

Clicking the M2OS login button on our website (as shown on the previous page) also takes you to this screen. To get back to the login screen with the Login to Administration Site button, click the Volunteer button here.

So, we’ll recommend again, bookmark the links! Bookmark www.gsnutsandmags.com/admin to get directly to where you will log in as service unit fall product chair (and as troop fall product chair). Bookmark www.gsnutsandmags.com/gslga and that will take you directly where you will log in as a parent. But remember, you still only have to have one user name and password. Bookmarking these pages, by the way, means that if you need to access M2OS after the Fall Product Program is over and we’ve disabled the M2OS button on our website, you can still get in to view data and print reports.

When creating your login and password, if you are also the troop fall product chair, you will be able to choose which role you are accessing from the User Role Selection screen. This will be true once both your roles have been added by upload, manually by the product programs manager, or by any other service unit fall product chair for your service unit.

If, once logged in (whether as service unit or troop), you want to change to the other role, you can just click (Change) at the top of your M2OS screen and the User Role Selection screen will open again.

You can also view the previous season, by selecting that radio button. You can only view roles you have access to, but if you were the service unit fall product chair last year and are using the same email address, you will see the previous season; similarly, if you were the troop fall chair and are using the same email, you will be able to access your troop’s data from the previous season.