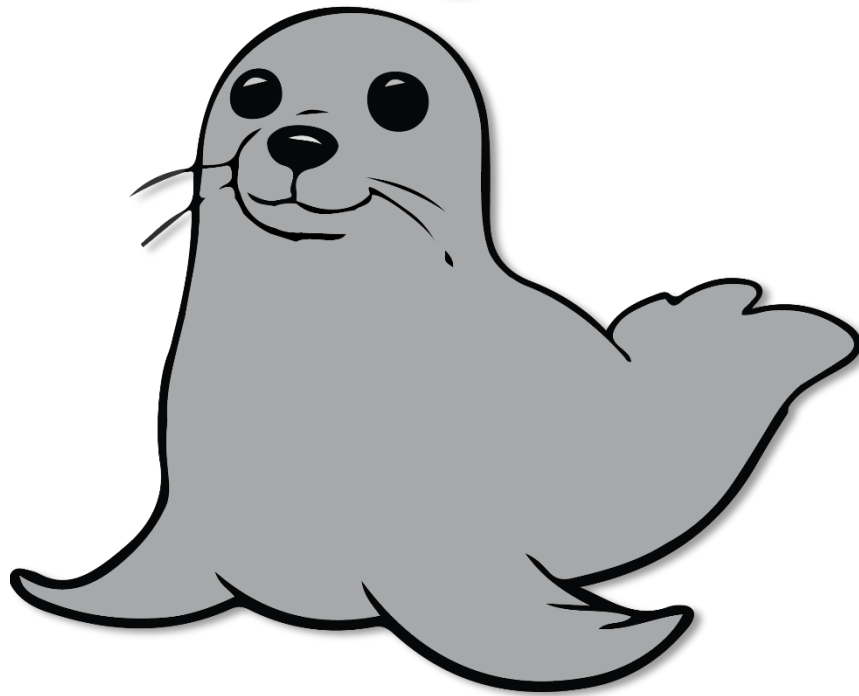


GO  
BRIGHT  
Ahead



# 2022 FALL PRODUCT PROGRAM SU M2OS GUIDE

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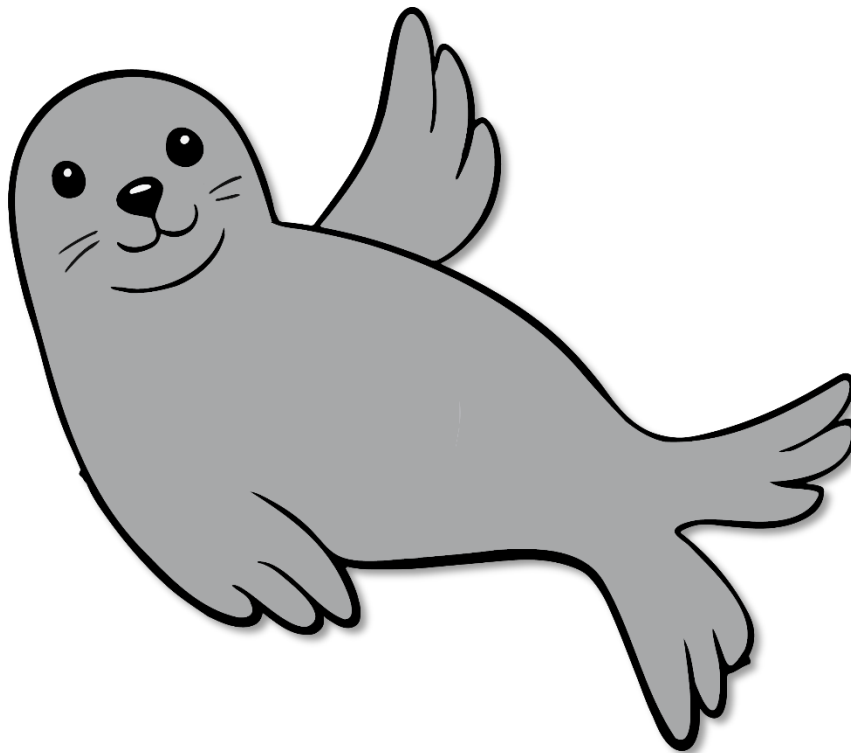
# WELCOME

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 9. Only those troop fall product chairs who have submitted their form (and ACH Authorization) on time will be imported into M2OS. After September 15, *you* will be able to manually add any *additional* troop users. (*Note: girls registered as of September 9 will be uploaded into M2OS by the product programs department ahead of the September 23 start date*).

The troop fall product chair can send an email to each parent/guardian in their troop that includes the link to M2OS. Girls (and parents/guardians) 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. (Receiving the email is not the only way girls and their parent/guardian can access M2OS, as there is also a link on our website.) Girls whose membership registration occurred on or after September 9 were not part of our girl upload; they can be added by the parent/guardian 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](http://www.gsnutsandmags.com/admin) - in your browser as you will use the same link to log in to M2OS each time ([www.gsnutsandmags.com/gsgla](http://www.gsnutsandmags.com/gsgla) will also get you to M2OS, you will just have one extra click).

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 (see image at right). Select the **Login to Administration Site** button. (The **Go to Campaign Site** link is where parents/girls will click to get to the girl/parent login page.)

Then enter your email address and your newly created password (as shown to the left).

Next, you'll be asked to update your user profile (as shown to the right). 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 now if you wish 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 confirmed, you may need to skip and come back. 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 display 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 Step 2, **Product Delivery Agent and Pick Up Times**, as shown at right. Do not fret if you do not enter anything now; 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 *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 necessary, you can enter special instructions in the applicable field (not shown). When done, click **Save**.

If 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**.

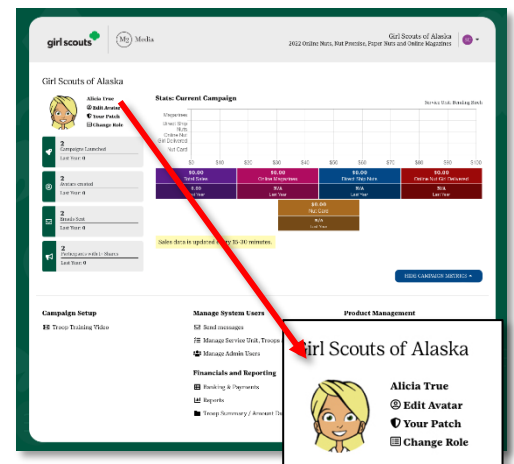
## Entering Reward Delivery Location

Next you will need to enter information for where your Rewards will be delivered in January (approximately). 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 – yes YOU! -- will be able to create your own personalized avatar! The fun is not just for the girls and troops. You see the **Edit Avatar** 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.

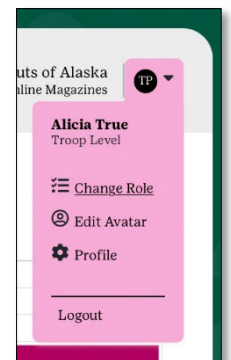


Below that are four sections that will track: **Campaigns Launched** (girls who have sent 1 or more emails), **Avatars Created** (those created by girls in your service unit); **Emails Sent**, and **Participants with 1+ Shares** (e.g., through Facebook or Twitter via M2OS).

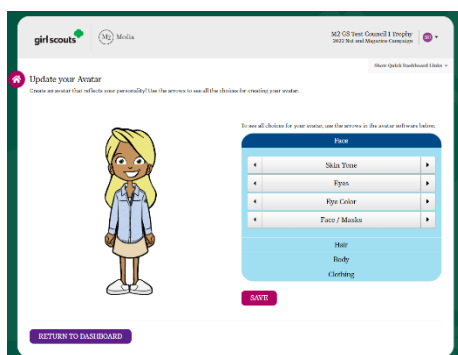
In the center is where your sales will be tracked – **Total Sales**, **Online Magazines**, **Direct Ship Nuts**, **Online Nut Girl Delivered**, and **Nut Card**. Also, as one of the pilot councils, you will also see the **Personalized Specialty Items** here, too (*this is not shown in the sample image and the exact wording may differ*). We recommend that troops enter their nut card orders as individual girl orders in M2OS ... and to save time, have their parents/guardians 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.

Before we move to the lower portion of the Dashboard, let's talk about one more element in the upper portion, 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 get to your Troop role or to previous season by selecting **Change Role**. You can also select **Edit Avatar**, 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** (not shown in sample). Lastly, you can open this panel to **Logout** of M2OS.



## Setting Up Your Avatar



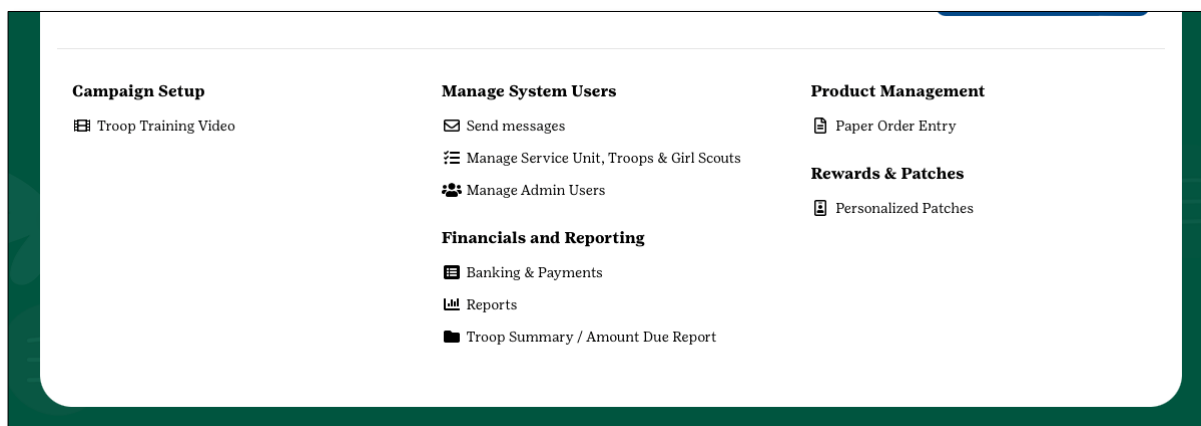
Ah, but before we explore the rest of your Dashboard, let's get your avatar set up! Setting up your avatar is easy and fun! Click on the **Edit Avatar** link on your Dashboard (or the "shortcut panel" as shown above). It is here you can set all sorts of options for your avatar – gender, skin tone, hair 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).



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. Including the mailing address is critical, and you should make sure let your troops know to make sure the parents know. A patch can be delayed if there is no address (they don't get sent until January).

## Dashboard (cont.)

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



You will see five sections: [Campaign Setup](#) (where you can view the Troop Training Video, should you need to reference it), [Manage System Users](#) (where you manage the troop fall chairs using the system), [Financials & 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). It is critical that you enter the Troop Fall Chairs who have submitted the Troop Fall Chair Agreement, their ACH Authorization and have attended a training (in-person, virtual, or online via gsLearn) so that they have access to monitor what the girls are doing (see the Troop M2OS Manual where we cover the Troop role).

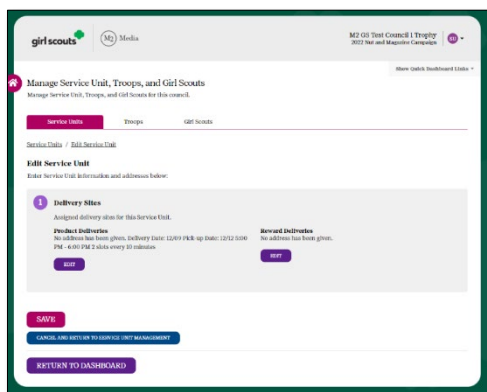
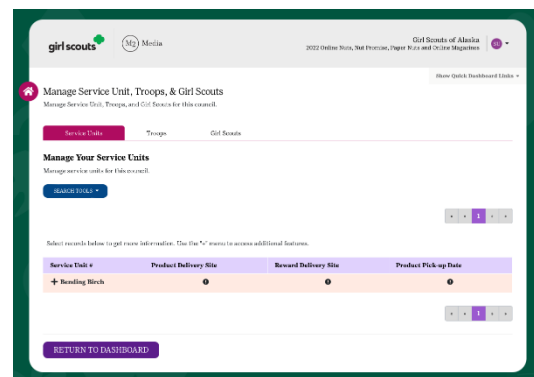
Click on [Send Messages](#) when you want to send a quick message to all your troop fall product program chairs. This has pre-selected categories, such as: **Has Participants Missing Reward Action, Logged In, Message and Not Logged In**. The Logged In and Not Logged In are obvious; you might want to 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. 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, & 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.

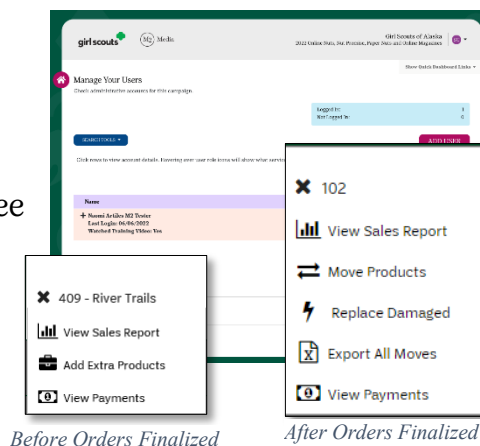


Click on the + and you will get 2 options: **Edit Service Unit**, and **Sales Report**. Let's select Service Unit; what you will see will be like that at left. Click **EDIT** to edit the applicable section (it will open a form like that seen earlier with **Entering Delivery Site Information** and **Entering Reward Delivery Location**).

Returning to the previous screen, additional options that will show during the sale are: **Add Extra Products** and **View Payments**.

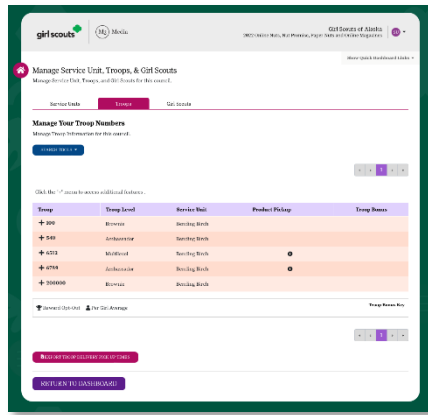
It is rare – but not improbable – that the service unit will want to order extra product. Note that any extra product the service unit orders will be the responsibility of the service unit (if not transferred to troops who request it); it cannot be returned with the “round up” product that is automatically 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**.





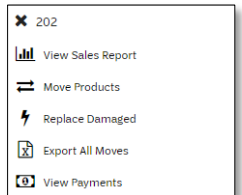
## Troop



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



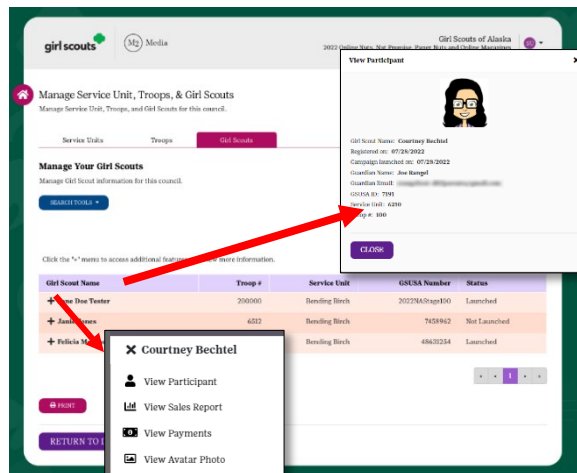
*Before Orders Finalized*



*After Orders Finalized*

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 necessary, you can assist the troop with these tasks, and it is from here that you will enter Troop to Troop transfers that cross service units.

## Girl Scouts

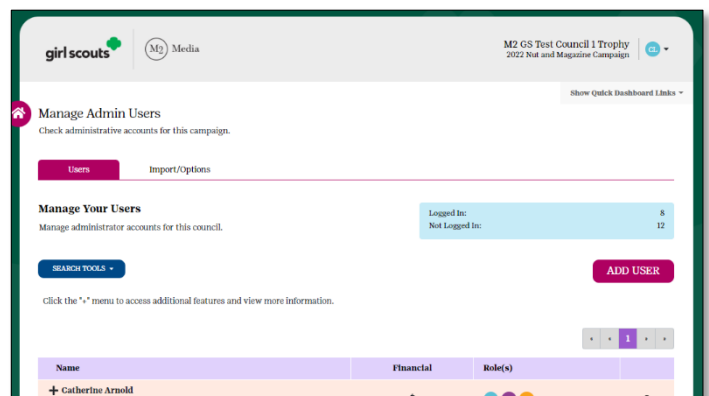


Lastly, there is the **Girl Scouts** tab. Here you can see all the girls in your service unit. If you click the + next to the girl's name, you will see a list of options: **View Participant**, **View Sales Report**, **View Payments**, and **View Avatar Photo**.

Clicking View Participant, 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, 18, or more) and the guardian's name and email address. Further, after the order has been finalized, you will see also **Move**

**Products**, **Replace Damaged**, **Export All Moves** and **View Payments**.

**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 user id (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 this year) their data will pre-populate. Otherwise, enter their name and then select their role(s). Click the Service Unit toggle to activate that role and then enter the 3-digit code for your service unit (e.g., 400, 506, 641, etc.) *and/or* click the Troop toggle to activate that role and then enter the troop number for the troop(s) this user is to be linked to. In both cases, M2OS

will list your service unit or troop number options as you type in the digits. Once you are done, click **Add**. (In M2OS, do not use the leading zeros for troop numbers – e.g., troop 00123 would be entered as 123; 01234 would be 1234, and so forth).

If you have an existing user, you can add/or remove them from a service unit or troop role by clicking on the + next to their name, and either turning off the toggle, or adding an additional service unit or troop to their account.

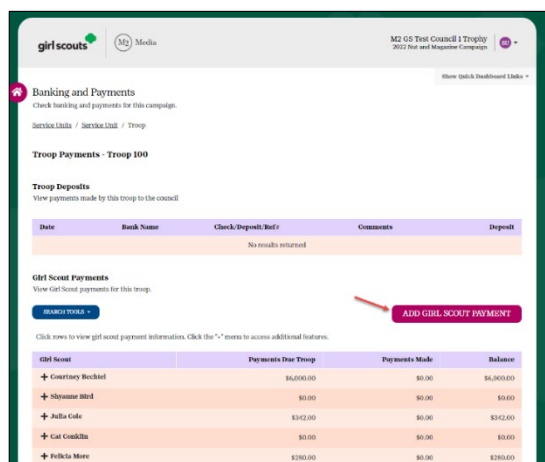
You can also click the + to get to this screen to see which email address is being used, in case the user is having trouble logging in. (Maybe they put a different email on the TFC Agreement than they are trying to log in with...) If the email address is correct, and they are still having issues, you can click on the + next to their name and choose either **Reset Password** (it will trigger an email to that user at that email address) or **Temporary Password** which give you a temporary password you can send to them via email outside of M2OS to log in. If nothing resolves the issue, contact your council product programs manager.

What you will also notice on the main Manage Admin Users screen is that you can see the date of when the user last logged. Plus, by hovering your mouse over the TP or SU button on their row, you can see to which service unit(s) or troop(s) they are linked (sometimes a person gets added, but the role toggle is not set).

## Financials and Reporting

In this section you will find all your troops listed and a summary of their gross sales, proceeds, total owed, total payments, and balance due. Troops should be entering only payments made by girls/parents – the funds they collected from their *in-person* customers (payments from Online - Shipped and Online – Girl Delivery will be automatically credited).

Troop #	Gross Sales	\$ Collected Online	Total Proceeds & Bonuses	Total Owed	Total Payments	Balance
800	\$53,777.00	\$26,875.00	\$7,473.75	(\$171.50)	\$0.00	(\$171.50)
810	\$237.00	\$180.00	\$52.50	\$34.50	\$0.00	\$34.50
209	\$1,280.00	\$180.00	\$312.50	\$837.50	\$0.00	\$837.50



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 an **Add Girl Scout Payment** button. 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**.

up on what their girls owe the troop and to ensure there will be sufficient funds for the ACH debit in early December.

Alternatively, you can also click the + next to the girl's name and select **Add Girl Scout Payment**.

## Reports

Troop	Qty	Subs	Qty	Subs	Total
301	0	\$0.00	0	\$0.00	\$0.00
549	0	\$0.00	0	\$0.00	\$0.00
6212	0	\$0.00	0	\$0.00	\$0.00
6787	0	\$0.00	0	\$0.00	\$0.00
20000	0	\$0.00	0	\$0.00	\$0.00
<b>Total</b>	<b>0</b>	<b>\$0.00</b>	<b>0</b>	<b>\$0.00</b>	<b>\$0.00</b>

Sales reports can be found 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, personalized items, 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 **Magazines** 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. 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/guardian, too!)

The last tab you can select (as well as the troop and parent/girl) is **Summary Report**, as with the others, you can drill down by Troop number to see a summary of each of your Troops’ specific totals. (There is also a link to this report from the Dashboard in the Reports section.)

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 Online - Girl Delivery orders, they would show as well.

For each of these reports, you can choose from these options: **Print, Export As PDF, Export Excel, and Email 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/guardian enter the order for her/his Girl Scout, or that the troop entered for each of their girls (once the parents/guardians were locked out). However, if the troop gets locked out (their deadline passes), it may be necessary for you to enter orders.

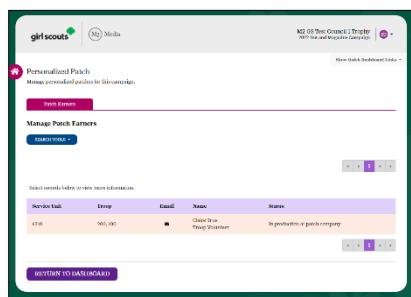
When you click **Paper Order Entry**, you will see initially a field where you enter the troop number (it will give you a list as you type in the digits). Once the troop is selected, you will then see the girls in that troop.

To edit an order, click on the + next to girl's name and select **Edit Paper Order**. 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/guardian 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/guardian entered what was an Online – Girl Delivery 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 from 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.

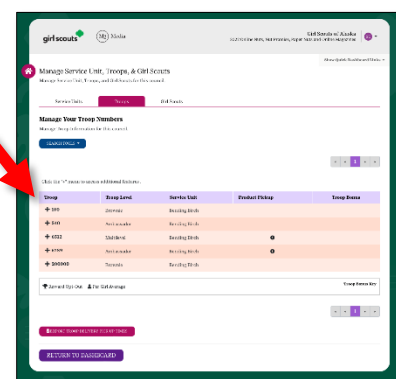


**Important Note: this functionality will not be active until after the “initial order” has been finalized by council. Refer to your SU Fall Product Guide for timeline.**

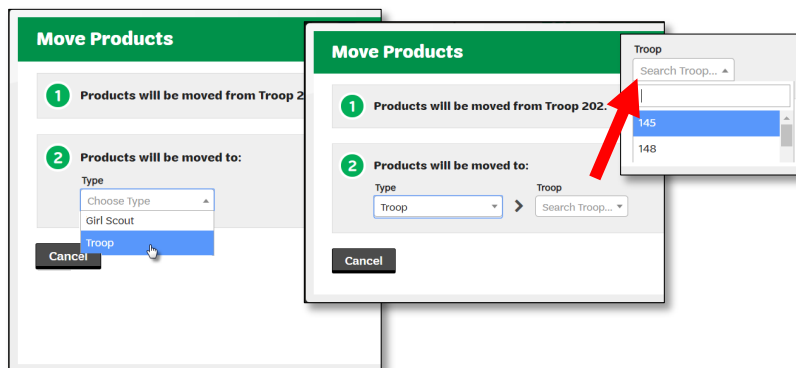
You will go to the [Manage Service Unit, Troops, & Girl Scouts](#) link from your Dashboard. Select the **Troops** tab.

Select the **+** next to the troop you are transferring product *from*. Select the **Move Product** option.

In Step 2 (see images next page) choose whether you are transferring to a Girl Scout 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.

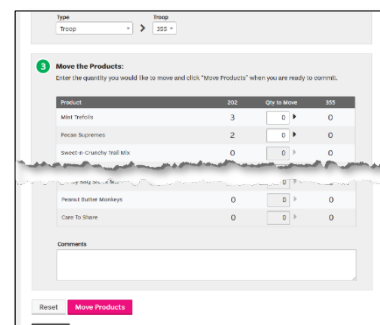






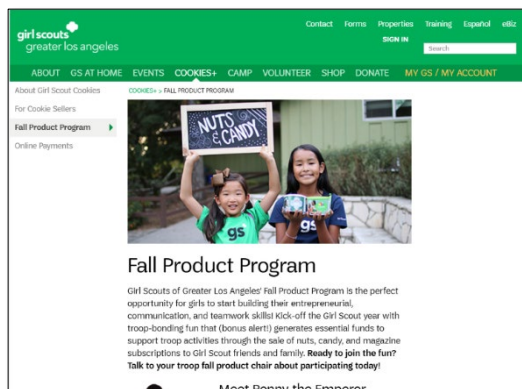
Once you find the troop you are looking for, you will be able to transfer the product. You can only transfer product the troop has available. Troops cannot transfer anything that was ordered as part of an Online – Girl Delivery order, only those that were entered from their order card orders, troop extras, 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.



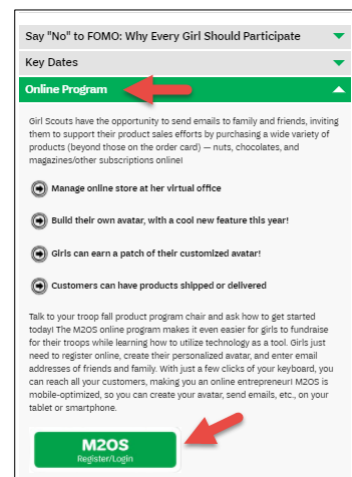
When transferring product from your round up, the process is the same except you will start from the **Service Unit** tab.

## Accessing M2OS During The Sale

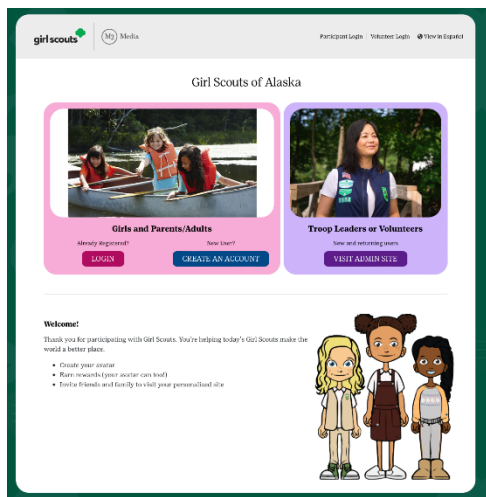


To conclude our overview of M2OS, let's review how you will return to M2OS during the sale. If you have not bookmarked or favorited the link [www.gsnutsandmags.com/admin](http://www.gsnutsandmags.com/admin) in your browser (Microsoft Internet Explorer, Microsoft Edge, Chrome, Safari, etc.) – which we *strongly* recommend – you can get there by first going to GSGLA's website at [www.girlscoutsla.org/fallproduct](http://www.girlscoutsla.org/fallproduct) (or Cookies+ > Fall Product Program).

You will then see the Fall Product Program main page, shown above. Then select the Online Program subject header (as indicated by the red arrow in the image below), which will expand that content area. At the bottom is the link to M2OS.







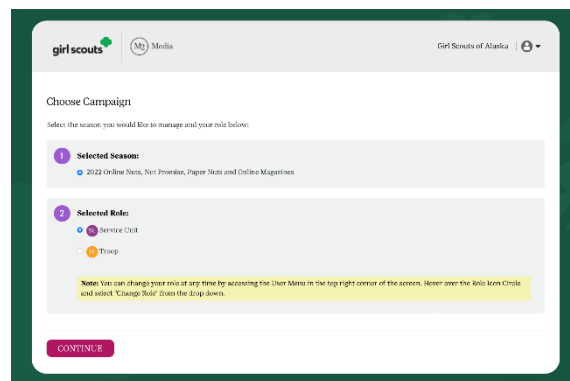
Once you click the link, you will be taken to a “pre-login” page (your troop fall chairs and parents/guardians will as well) – as shown at left. As we mentioned when talking about [Log In and Password Creation](#), clicking the [Go To Campaign Site](#) button will take parents/guardians to *this* log 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 [Visit Admin Site](#) button (in the purple section).

So, we’ll recommend again to *bookmark the link!* We recommend bookmarking the admin link [www.gsnutsandmags.com/admin](http://www.gsnutsandmags.com/admin), which will take you to where you will select [Login To Administration Site](#) to log in as service unit fall product chair (and as troop fall product chair) and also, if you are a parent/guardian of a Girl Scout, you can get to [Go To Campaign Site](#). But remember, you only need ONE username and password for all roles. Bookmarking this link 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 left of your M2OS screen (where the picture of your avatar’s face is), 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.