



2023 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.

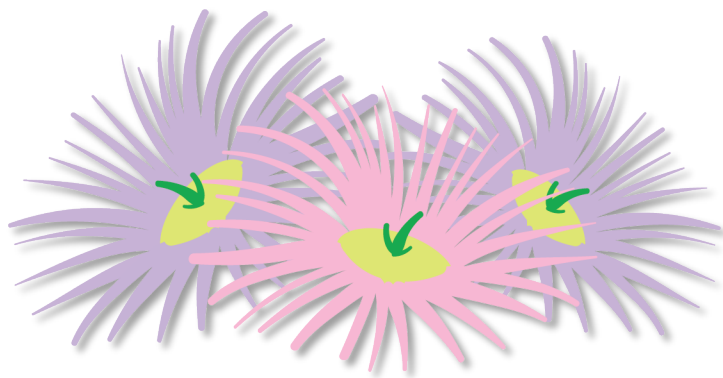
Council will upload those troop fall product chairs (TFPC) who have submitted by September 8 both their *Troop Fall Product Chair Agreement* and *ACH Authorization*, but only if also the troop leader or treasurer has submitted the troop's Year-End Financials.

After you have access, *you* will be able to manually add any *additional* troop users. However, you should confirm they have completed their TFC, ACH, attended training, and the troop has submitted their Year-End Financials.

Girl Scouts registered as of September 18 will be uploaded into M2OS by the product programs department ahead of the September 22 start date. Girl Scouts whose membership registration occurred on or after September 18 were not part of our upload; they can be added by the parent/caregiver as part of the account set up process (see the *Troop M2OS Guide* for more information).

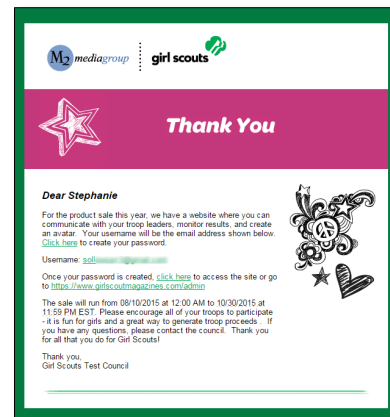
We give the TFPCs early access so they can send an email to each parent/caregiver in their troop that includes the link to M2OS. Girl Scouts (and parents/caregivers) will follow the link to set up their/their Girl Scout's personalized avatar, import or enter email contacts, and participate in the online portion of the fall product program. (Receiving the email is not the only way girls and their parent/caregiver can access M2OS, as there is also a link on our website.)

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



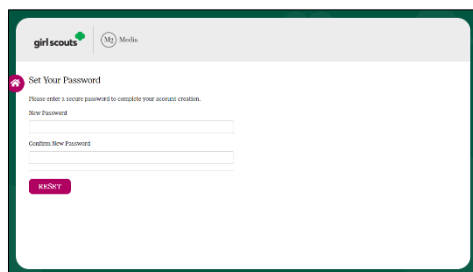
Log In/Password Creation

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. If you were a SUFPC last season, you should not need to set a password; if you are prompted to, you can reset it to what you used the previous season. (This guide assumes a brand new user.)



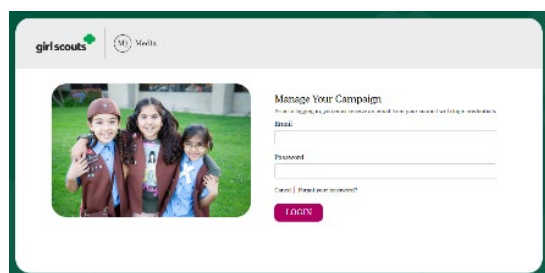
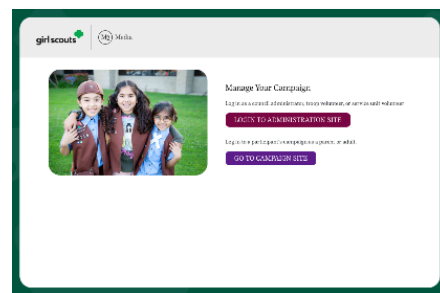
M2OS is also where your troop fall product chairs (TFPCs) will manage the troops' sales of nuts, candy, magazines and other fall product items.

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 (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.

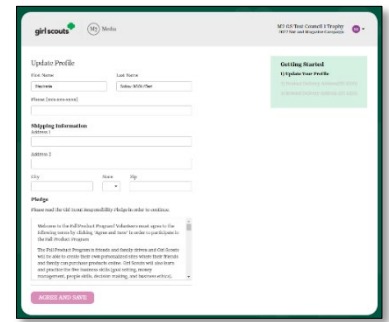
Once you have created your password, you are ready to log in (see image at right). Select the **Login to Administration Site** button. (The **Go to Campaign Site** link is where parents/caregivers and their Girl Scout will click to get to the Girl Scout/parent/caregiver login page.)



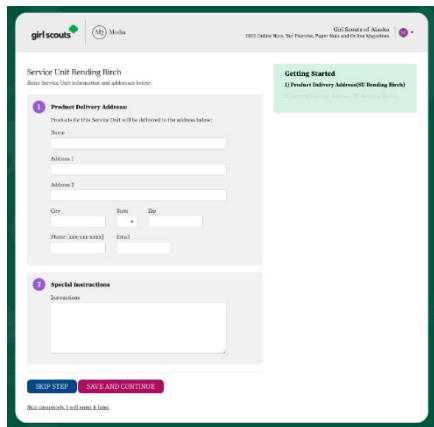
Then enter your email address and your newly created password (as shown to the left).



Whether you are new or returning from last season, you'll be asked to update your user profile (as shown to the right) and agree to the online pledges (just as your TFPCs will, and the Girl Scout and parent/caregiver will). When you are finished, click [Update](#).



Entering Delivery Site Information

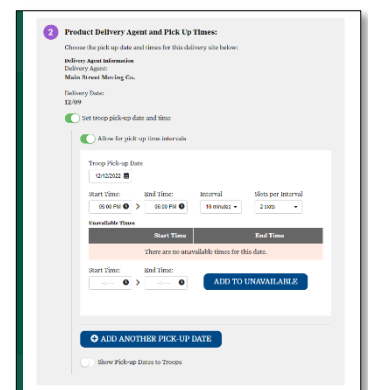


Next you will be asked to enter your [delivery site location and create a pickup schedule](#). You can skip this step now if you wish and come back later, as the system will prompt you to complete it each time you log in. If you do not have your location confirmed, you may need to skip and come back. 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 be displayed to the troops in your service unit when they print a delivery ticket.

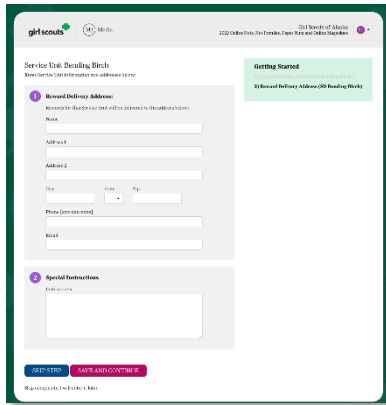
If your PPM has already entered the Delivery Agent and your Product Delivery Date you will see Step 2, [Product Delivery Agent and Pick Up Times](#), as shown at right. Do not fret if you do not enter anything now; you will be able to come back to this page to set up your schedule (which we will explain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

To edit/update delivery information for both products and rewards (if you did not do so upon logging in), go to [Manage Service Unit, Troops & Girl Scouts](#), then click the + next to your SU name /number and select [Edit Service Unit](#). Make any additions/corrections/updates and click [Save](#).



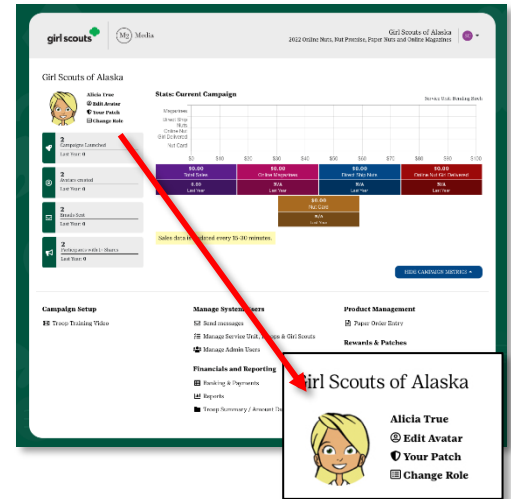
Entering Reward Delivery Location

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 Girl Scouts in their troops, you – yes YOU! -- will be able to create your own personalized avatar! The fun is not just for the Girl Scouts and TFPCs! 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** (Girl Scouts who have sent 1 or more emails), **Avatars Created** (those created by Girl Scouts in your service unit); **Emails Sent**, and **Participants with 1+ Shares** (e.g., through Facebook or Twitter via M2OS).

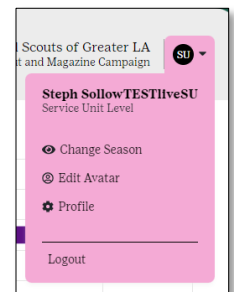
In the center is where your sales will be tracked – **Total Sales, Online Magazines, Direct Ship Nuts, Online Nut Girl Delivered**, and **Nut Card**. Also, you will also see the two new items – Tervis® Tumblers and BARKBox listed here (*this is not shown in the sample image and the exact wording may differ*). Above all these, there is a graphical representation of your sales.



Important Tip: We recommend that troops enter their nut card orders as individual orders in M2OS (not all in Troop Extras) ... and to save time, ask their parents/caregivers to do the data entry! All the troop chair and you need do then is review it.

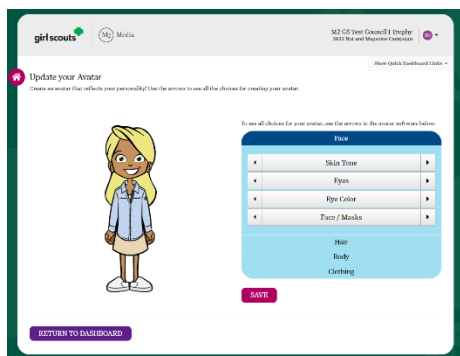
Before we move to the lower portion of the Dashboard, let’s talk about one more element in the upper portion, which appears at the very top right corner.

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 the previous season by selecting **Change Role** (note: if you did not have access the previous season you won’t be able to view the previous season.)



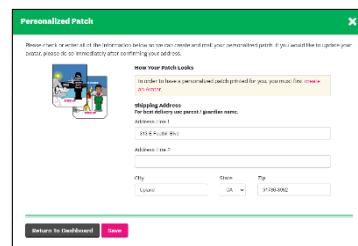
You can also select [Edit Avatar](#), which we will cover shortly. Or you can update your [Profile](#). If you have a participating Girl Scout, you can also click [Visit Campaign Area](#) (not shown in sample) to switch to that role. Lastly, you can open this panel to [Logout](#) of M2OS.

Setting Up Your Avatar



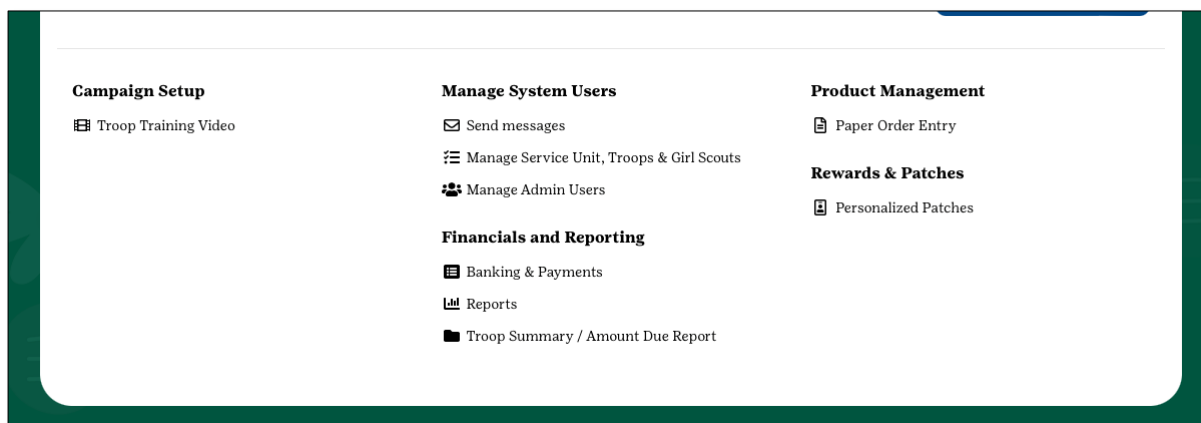
Ah, but there's one more thing before we explore the rest of your Dashboard, let's get your avatar set up! Setting up your avatar is easy and fun! Click on the [Edit Avatar](#) link on your Dashboard (or the "shortcut panel" as shown above). It is here you can set all sorts of options for your avatar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

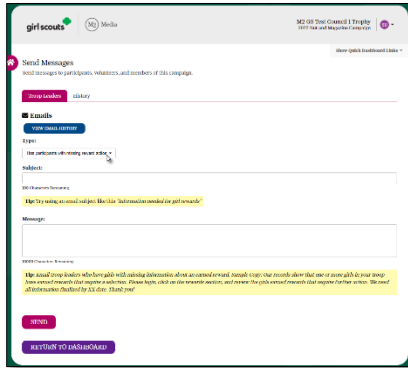


You will see five sections: [Campaign Setup](#) (where you can view the Troop Training Video, should you need to reference it), [Manage System Users](#) (where you manage the troop fall chairs using the system), [Financials & Reporting](#) (viewing payments and other reports), [Product Management](#) (paper order entry and, after the product order has been finalized by council, delivery tickets) and [Rewards & Patches](#) (personalized patch earners and the production status).



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 TFPCs who have submitted the *Troop Fall Product 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 their Girl Scouts are doing (see the *Troop M2OS Guide* where we cover the Troop role). (Again, before adding a troop user, the troop must have also submitted their year-end financials; check with your service unit manager or service unit treasurer to confirm.)

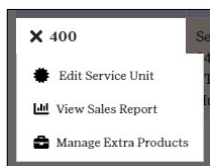
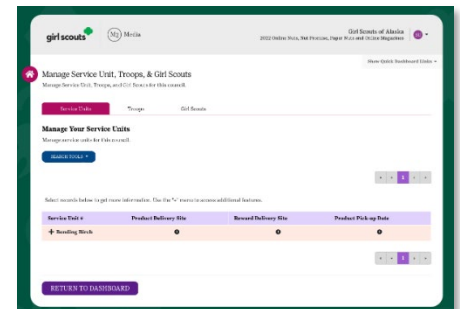
Click on [Send Messages](#) when you want to send a quick message to all your troop fall product program chairs. This has pre-selected categories, such as: **Has Participants Missing Reward Action, Logged In, Message and Not Logged In.** The Logged In and Not Logged In are obvious; you might

want to contact the latter so that they get logged in and are able to see what their troop is 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.

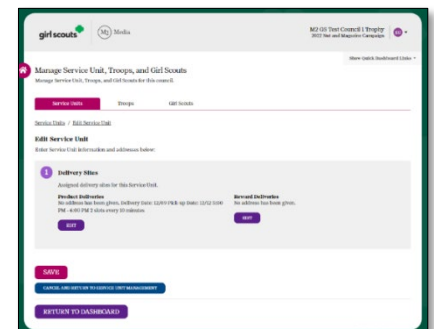
[Manage Service Unit, Troops, & Girl Scouts](#) has several functions, and we'll cover each of these, starting with the [Service Unit](#) tab.

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.



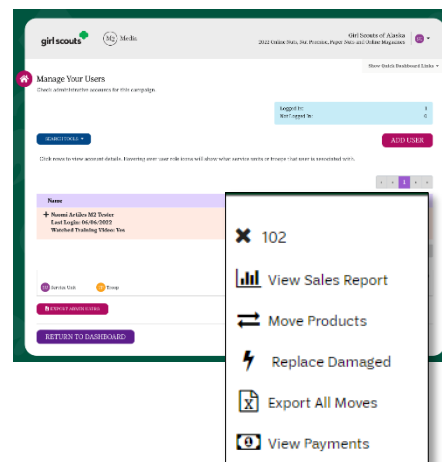
Click on the + and you will get 3 options: [Edit Service Unit](#), and [Sales Report](#) and [Manage Extra Products](#). Let's select Service Unit; what you will see will be like that on the left. Click [EDIT](#) to edit the applicable section (it will open a form like that seen earlier with [Entering Delivery Site Information](#) and [Entering Reward Delivery Location](#)).



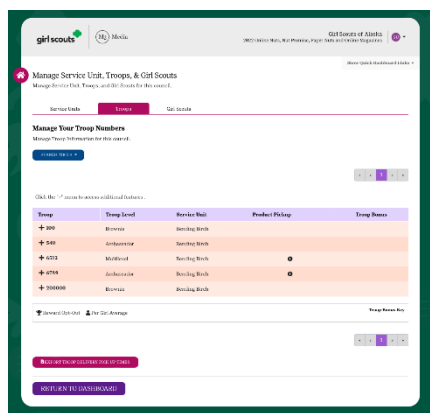
Returning to the previous screen, an additional option that will show during the sale is [View Payments](#).

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

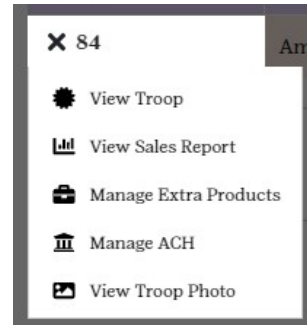


Troop

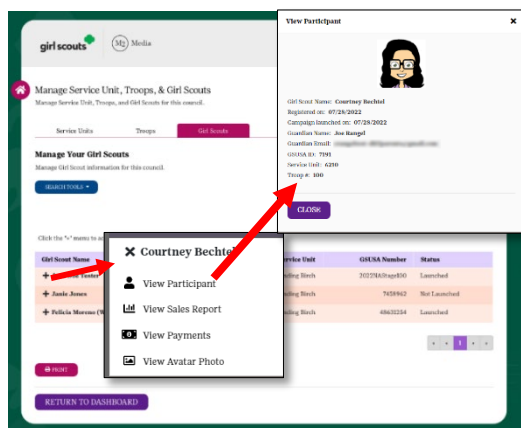


Moving to the **Troop** tab, you will see a list of troops added to the system, whether through council’s upload or added afterward. While there is no action by clicking on the troop, if you click on the + next to the troop number, just as you had some additional options, so will your troop. Prior to the order being finalized by the council, troops will see **View Troop, View Sales Report, Manage Extra Products, Manage ACH** and **View Troop Photo**. (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 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. (However, we’ll not be using Replaced Damaged; if you have or a troop has damaged product, reach out to your product programs manager (and see your *SU Fall Product Chair Guide* for more information on damages).



Girl Scouts

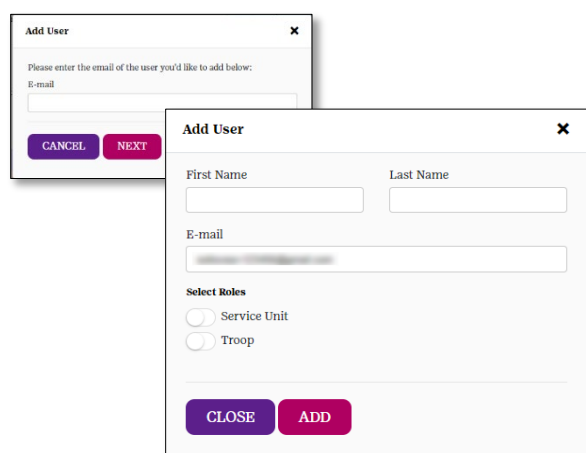
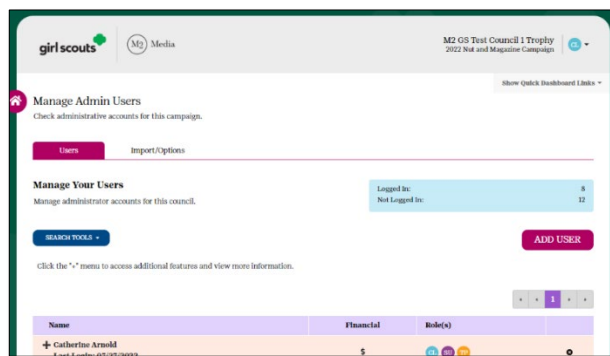


Lastly, there is the **Girl Scouts** tab. Here you can see all the Girl Scouts in M2OS in your service unit. If you click the + next to the Girl Scout’s name, you will see a list of options: **View Participant, View Sales Report, View Payments**, and **View Avatar Photo**.

Clicking View Participant, you will be able to see when the Girl Scout 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 parent/caregiver’s (guardian) name and email address.

Further, after the order has been finalized, you will also see [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 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).

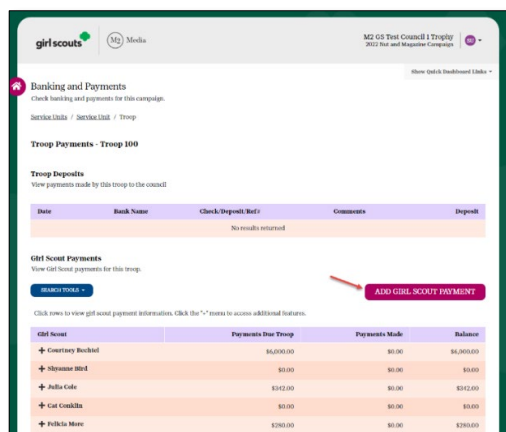
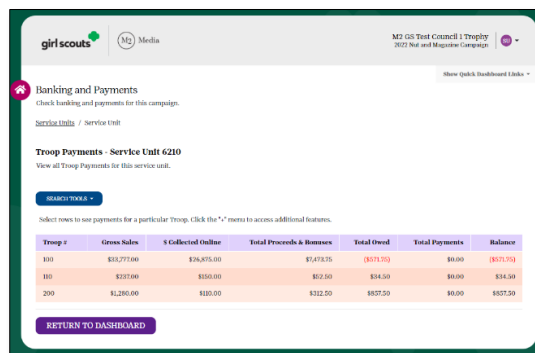
If you have an existing user, you can add/or remove them from a service unit or troop role by clicking on the + next to their name, and either turning off the toggle, or adding an additional service unit or troop to their account.

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 TFPC 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 that are in M2OS listed and a summary of their gross sales, proceeds, total owed, total payments, and balance due. Troops should be entering only payments given to them by parents/caregivers – the funds they collected from their in-person customers (payments from all online sales will be automatically credited).

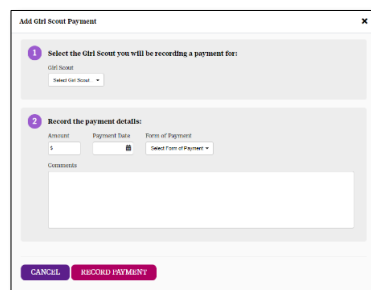


If you need to add a payment from a Girl Scout (parent/caregiver) to the troop on behalf of the troop, click on the troop to drill down to the next level. You will then see an **Add Girl Scout Payment** button. Click it to open a window for you to select the Girl Scout the troop received payment from, 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**.

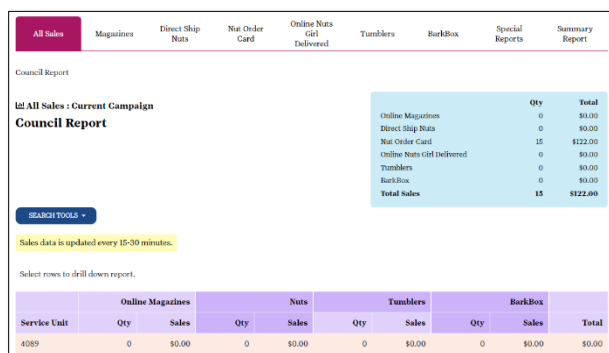
Troops should be entering their received payments

often to keep up on what their Girl Scouts 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 Scout's name and select **Add Girl Scout Payment**.



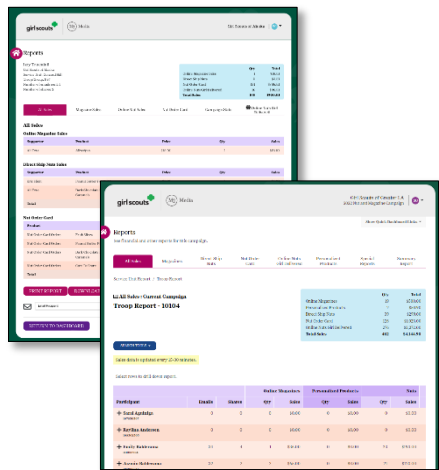
Reports



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, nuts, etc.). Click on a troop to see the overall orders of the Girl Scouts in that troop. Click on a Girl Scout to see each order 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. The same is true for each: **Nut Order Card**, **Online Nuts Girl Delivered**, **Tumblers**, and **BarkBox**. Each allows you to drill down to the Girl Scout level. And guess what! Your troops have this same report. And even cooler yet, so do the Girl Scouts and their parent/caregivers! 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/caregiver, too!)

The last tab you can select (as well as the troop and Girl Scout/parent/caregiver) 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.)



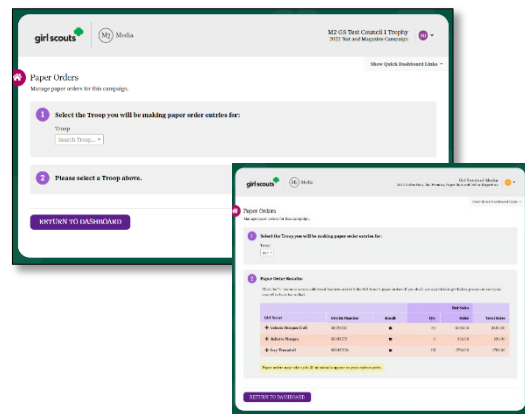
In the top left image, you can see a detailed view of a troop, showing all sales for each Girl Scout, as well as a table (in blue) that includes total sales for the troop, categorized by type (magazines, nut order card, etc.).

In the bottom left image, you can see a detailed report for just a single Girl Scout's orders, which also includes a table showing total sales by type.

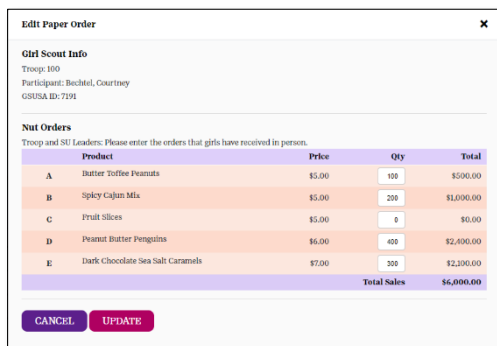
For each of these reports, you can choose from these options: **Print**, **Export As PDF**, **Export Excel**, and **Email Report**. Perhaps you wish to provide the service unit treasurer a high-level view of the service unit's sales – you have the option of sending an email through M2OS directly or sending through your own email program (Outlook, AOL, etc.) an attachment (either the PDF or Excel files).

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/caregiver enter the order for their Girl Scout, or that the troop entered for each Girl Scout (once the parents/caregivers were locked out). However, if the troop gets locked out (their deadline passes), it may be necessary for you to enter orders. In this case, you should request a copy of the order card(s) from the troop fall product chair.



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 Girl Scouts in that troop.

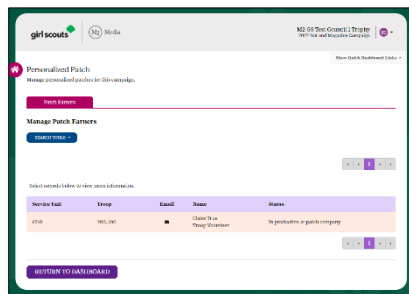


To edit an order, click on the **+** next to Girl Scout's name and select **Edit Paper Order**. Enter the Girl Scout's order for each product (sum totals for each variety) and when finished, click **Update**.

If the order was entered, but there was an error that needs to be fixed or product that needs to be added or 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 Scout and the parent/caregiver also entered individually for her Girl Scout (and the troop has been locked out from making changes). You could zero out the Girl Scout order (making sure the product was included in the Troop Extras). Another example would be if the troop or parent/caregiver 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 Girl Scout 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, and they can reassign product from one Girl Scout to another—however, *only* product ordered from their order card or assigned to a Girl Scout from any troop extras. They *cannot* transfer online orders, whether girl delivery or shipped.

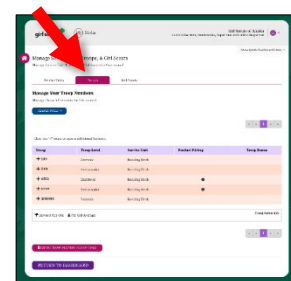
Troops can only move items that are available in their inventory. If they transferred to or exchanged items with another troop, they need to make sure that transfer/exchange was entered in M2OS. If it was a transfer, the troop “giving away” the product makes the entry. With an exchange, each troop enters the “to” part of the entry (we cover troop to troop transfers in the *Troop M2OS Guide*),

There may be occasions where, as a service unit fall product chair, you will need to enter any troop-to-troop transfer; mostly this will be those that cross service unit boundaries. That is, if troop A in *your* service unit transferred products to troop B in a neighboring service unit, you would need to enter the transfer. 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.

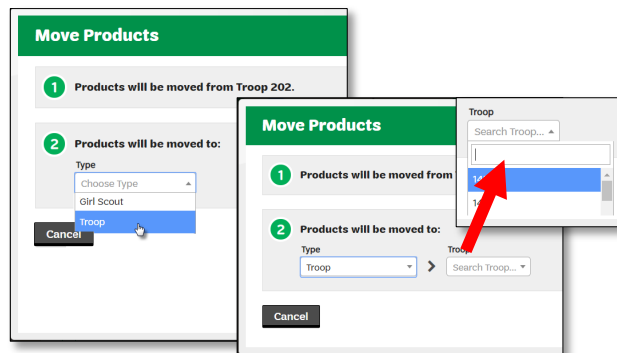


Important Note: this functionality will not be active until after the “initial order” has been finalized by council. Refer to your *SU Fall Product Guide* for timeline.

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



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

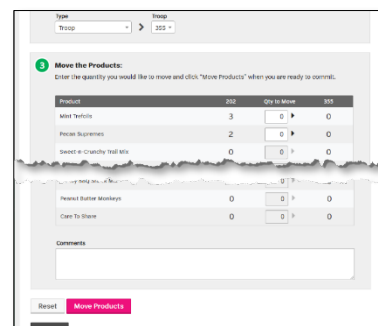


In Step 2 (see images to the left) choose whether you are transferring to a Girl Scout or a Troop. In most cases you will be transferring to a Troop, so let's select Troop.

A dropdown field will appear where you can select the troop number to which you are transferring product. As you type in digits in the search field (see inset, left), it will list troop numbers that match the pattern. For example, 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.

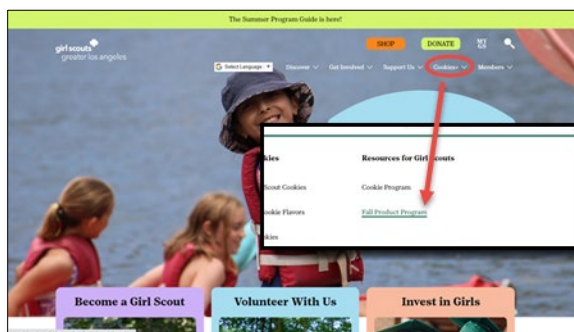
Once you find the troop you are looking for, you will be able to transfer the product. As we mentioned above, only product the troop has available can be transferred, and troops cannot transfer anything that was ordered as part of an online order, only those that were entered from their order card, from troop extras, or a previous troop to troop transfer.



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

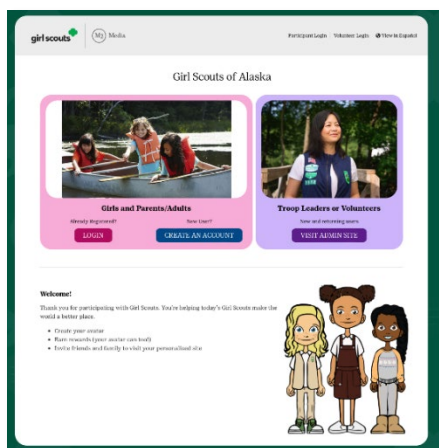


To conclude our overview of M2OS, let's review how you will return to M2OS during the sale. If you have not bookmarked or favorited the link www.gsnutsandmags.com/admin in your browser (Microsoft Internet Explorer, Microsoft Edge, Chrome, Safari, etc.)—which we *strongly* recommend—you can get there by first going to GSGLA's website and selecting Cookies+ > Fall Product Program (as shown above) or simply enter the URL www.girlscoutsla.org/fallproduct into your browser's address bar.

You will then see the Fall Product Program main page (as shown on the right). Scroll to the large icons, select Programming, then scroll to the Online Program subsection. At the bottom is the link to M2OS (see arrow).



Once you click the link, you will be taken to a “pre-login” page (your troop fall chairs and parents/caregivers will as well) as shown to the left. As we mentioned when talking about [Log In and Password Creation](#), clicking the [Go To Campaign Site](#) button will take Girl Scouts and their parents/caregivers to *this* log in screen. We revisit this in the *Troop M2OS Guide* when talking about the Girl Scout/parent/caregiver experience.

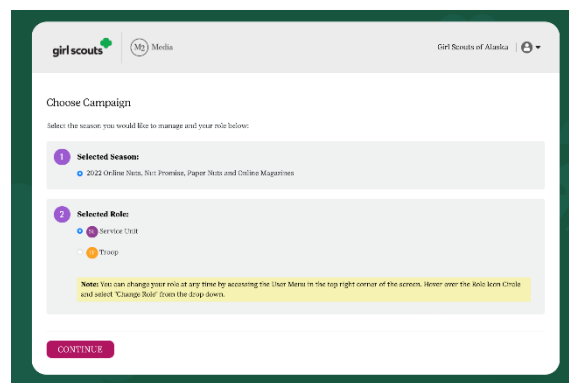


Clicking the M2OS login button on our website also takes you to this screen. To get back to the login screen with the [Login to Administration Site](#) button, click the [Visit Admin Site](#) button (in the purple section of the image to the left).

So, we'll recommend again to *bookmark the link!* We recommend bookmarking the admin link 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/caregiver 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.