

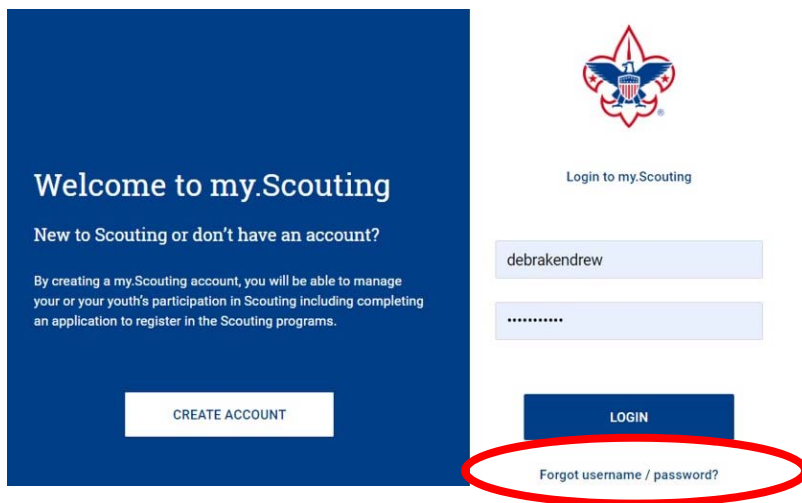
How to Input, View, and Respond to BeAScout Invitations/Leads on My.Scouting Website

The following individuals can see and respond to BeAScout Invitations and Leads. They must be registered in these positions to view inquiries from prospective families, send joining invitations, and add leads:

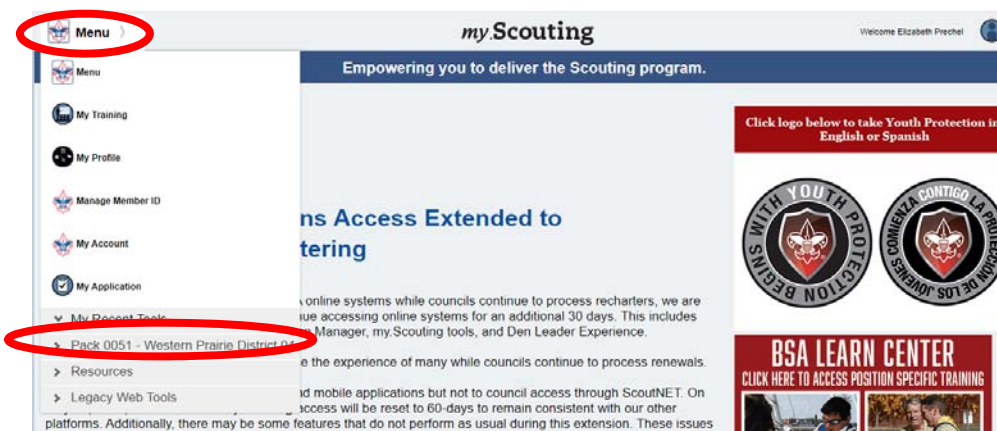
- Chartered Organization Representative
- Committee Chair
- Cubmaster/Scoutmaster/Crew Advisor/Post Advisor

The Unit Key 3 above will get automated e-mails that come out on Tuesdays and Fridays if there are any invitations and leads available. You can check the Invitation Manger at any time to see if there are any available. You can also input your own leads from e-mails, recruitment events, open houses, etc. to keep them all in one place and act upon them.

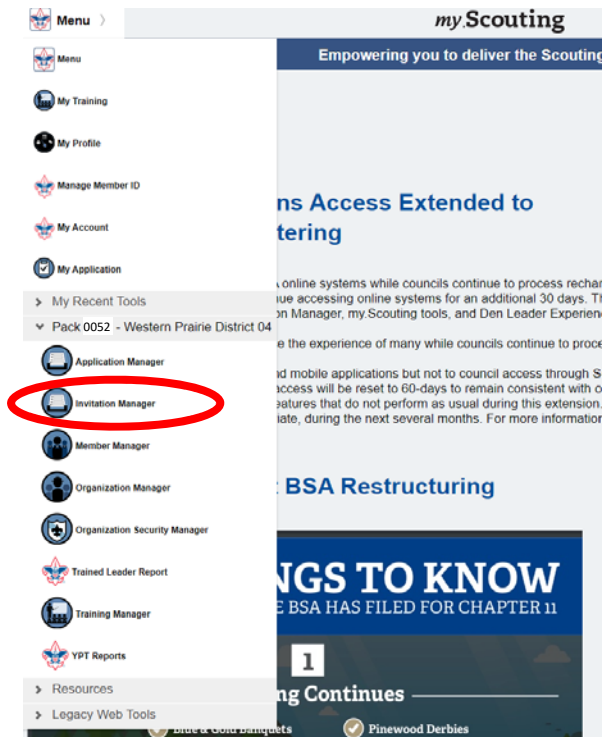
1. Visit <https://my.scouting.org> and sign-in if you have an account or create an account if you don't have one. If you have an account, but don't remember your username or password, click on **"Forgot username/password?"**



2. Click on **"Menu"** and then click on the Pack, Troop, Crew, or Post that you are wanting to view.

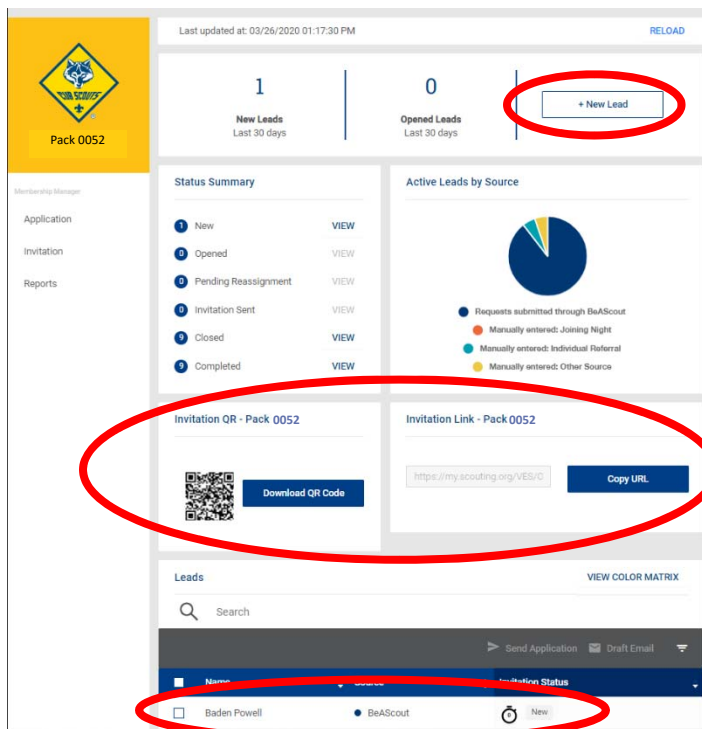


3. Click on "Invitation Manager."



4. Here at this page you will see a number of things you can do:

- Manually input new leads (step 5).
- Obtain your unit's unique QR code and your unit's URL (step 6).
- Respond and follow-up with leads from families that have requested information about Scouting (step 8).



5. You can also manually add leads you get at recruitment events, open houses, phone calls and e-mails received, etc. This keeps all names and contact information in one place so various folks can follow-up and applications can be sent. To start a new lead, click on “+ New Lead.”

The screenshot shows the BeAScout membership management interface for Pack 0052. At the top, it displays 'Last updated at: 03/26/2020 01:17:30 PM' and a 'RELOAD' button. Below this, there are two main statistics: '1 New Leads Last 30 days' and '0 Opened Leads Last 30 days', with a '+ New Lead' button. The 'Status Summary' section lists various lead statuses with 'VIEW' links: New, Opened, Pending Reassignment, Invitation Sent, Closed, and Completed. The 'Active Leads by Source' section features a pie chart with a legend: Requests submitted through BeAScout (dark blue), Manually entered: Joining Night (orange), Manually entered: Individual Referral (teal), and Manually entered: Other Source (yellow). Below these are sections for 'Invitation QR - Pack 0052' (with a QR code and 'Download QR Code' button) and 'Invitation Link - Pack 0052' (with a URL 'https://my.scouting.org/VES/0' and 'Copy URL' button). At the bottom, there is a 'Leads' section with a search bar and a table header for 'Name', 'Source', and 'Invitation Status'. A table entry shows 'Baden Powell' from 'BeAScout' with a 'New' status.

6. Here you can input contact information (name, address, e-mail, phone, etc.) that is important to keep track of and even send an application to a lead. To save without sending an application, click “Save.” To send an application and then save, click on “Send Application.”

The screenshot shows a form for entering contact information. The 'Lead Source' section has a dropdown menu. The 'Parent / Guardian / Volunteer Information' section includes input fields for 'First Name', 'Last Name', a dropdown for 'State/Region', and a field for 'ZIP Code'. At the bottom, there are three buttons: 'SAVE AND ADD ANOTHER', 'SAVE', and 'SEND APPLICATION'.

7. To obtain the unique QR or website link to your units online registration page at any time see the information in the middle of the screen. You can download the QR code and copy the URL to put them on flyers, posters, postcards, etc.

This close-up screenshot focuses on the 'Invitation QR - Pack 0052' and 'Invitation Link - Pack 0052' sections. On the left, there is a QR code and a 'Download QR Code' button. On the right, there is a text input field containing the URL 'https://my.scouting.org/VES/OnlineReg/1.0' and a 'Copy URL' button.

8. Here you will be able to view their contact information. You will also see any comments or notes they left and respond to them over the phone, e-mail, or directly through the page. You have several options (see 5a-5e below)

The screenshot shows a lead management interface with two main sections: 'Lead Information' and 'Lead Notes'.

Lead Information:

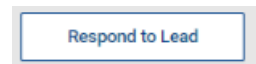
- Baden Powell**
- Current Status: Opened**
- Address: 315 N Main St, Fairmont, MN, 56031
- Phone: (555) 555-1910
- Email: bpowell@myemail.com
- Heard About: Friend/Parent
- Date Submitted: 03-26-2020
- Youth Information:**
- Baden Powell
- Age: 6 Grade: First Grade
- Contacted Organization: Pack 0051
- Currently Assigned to Organization: Pack 0051

Lead Notes:

- Status updated to Opened (Thu, Mar 26, 2020 1:31 PM) by Mary Jonson
- On March 26, 2020 I e-mailed and called the parent on the phone. The parent did not answer, but left a message with my name and number. I also sent her a text message. (Thu, Mar 26, 2020 1:41 PM) by Mary Jonson

At the bottom, there is a 'Comment from Lead' section with a 'Respond to Lead' button and a 'Type your note...' field with a 'POST' button. Below these are buttons for 'Reassign', 'Close Lead', 'Complete', and 'Send Application'.

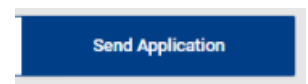
8a. Click on **“Respond to Lead”** and your default e-mail program will open and will already be addressed to the parent and have the comments the parent wrote in the body of the e-mail.



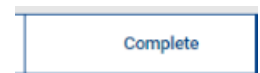
The screenshot shows an email client interface. The 'To' field is filled with 'bpowell@myemail.com'. The 'Subject' is 'Thank You for Inquiring about Pack 0052'. The body of the email reads: 'Dear Baden Powell, Thank you for inquiring about Pack 0052. The question/comment your submitted is: "I would like to get my child involved in Scouting, but don't know where to start.". I will try to supply the requested information below. Please let me know if you have any further concerns, so we can assist in welcoming you to Pack 0052. Sincerely, Mary Lynn Johnson'.

8b. **Post** - Keep track of phone calls, texts sent, e-mails sent, and other actions by adding notes and clicking on **“Post.”**

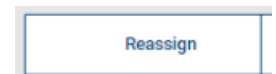
8c. **Send Application** - After communicating with the parent and they are ready to sign up, click on **“Send Application”** and it will send the parent a link to sign up for your pack to the e-mail they provided.



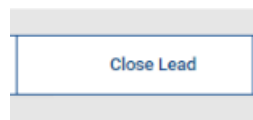
8d. **Complete** – After talking with the parent and they decided to join your pack, type out a note and post it and then click on **“Complete.”** This will remove the lead from your list.



8e. **Reassign** – By selecting this option, you will forward the lead to district and council key 3 to be assigned to another unit. You could select this option for many reasons, maybe they picked the wrong unit in the wrong town or perhaps your unit meets on the wrong night for them. If you select this option, you will need to provide a reason for reassigning them. You can post additional notes about the reassignment.



8f. **Close Lead** – You should only use this option if you talk to the parent and they have decided not to join Scouting for some reason. Be sure to post some notes as to why the parent changed their mind. Maybe they felt Scouting wasn't a good fit for them, maybe the night of the week didn't work, etc.



* Reassign Reason:

Select a reason for reassignment ^

- Not enough volunteer help
- Scheduling Conflicts
- Special Needs
- Too many members
- Other