



# Application Manager



You'll receive notifications in your email that you have applications that are Pending Acceptance. This is how you'll follow-up. The Unit Key 3, the COR Delegate and Key 3 Delegates have access to Application Manager to accept Online Youth applications. Only the COR or COR Delegate have access to accept Online Adult applications and must verify the applicants Youth Protection Training before approval. All online applications are pre-paid.

## Quick Step-by-Step Instructions to Accept

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, Select Application Manager under the Unit Name.
3. Click on the name of the Applicant under Application Status.
4. Scroll to bottom of new page and click on the ACCEPT button.

Application Status

Search

<input type="checkbox"/>	Name	Application Status
<input type="checkbox"/>	XXXXXXXX	 Pending Acceptance
<input type="checkbox"/>	XXXXXXXX	 Pending Acceptance

The time clock to the right of each name has a countdown of the number of days the application has been in Pending Acceptance status. Applications will time out at 30 days, no longer be listed and the National BSA will send the applicant a full refund. Please try to accept applications as quickly as possible.

For full instructions on the tools and management of Online Registration, please click on this link below,

[\*\*ONLINE REGISTRATON UNIT GUIDEBOOK\*\*](#)



# Invitation Manager

You'll receive notifications by email that you have Leads from potential new scouts wanting more information on your unit. The Unit Key 3, the COR Delegate and Key 3 Delegates have access to Invitation Manager to respond to the Leads.

You'll also find your unit's **QR code and URL Address** to your Unit Specific Application. This is a helpful tool to use with recruitment fliers/emails/Facebook Page and when sending invitations to prospect families.

## Quick Step-by-Step to Respond to Leads

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, Select Invitation Manager under the Unit Name.
3. Click on the name of the youth under Leads.
4. Respond to the family by clicking on the Respond to Lead button.
5. Send the family an application by clicking on the Send Application button.
6. Close the Lead by clicking on the Close Lead button.

The screenshot displays the 'Invitation Manager' interface. On the left, under 'Lead Information', the lead is for **Andrew Fiess**, with a 'Current Status' of 'New'. Contact details include an address in Albany, NY, a phone number (518) 860-9194, and an email address afiess@outlook.com. The lead was heard about through 'Online Search' and submitted on 09-19-2020. Youth information identifies the child as David Fiess, age 6, in first grade, associated with Twin Rivers Council 364, Fort Orange 01, and Pack 1078. A 'Respond to Lead' button is visible. On the right, the 'Lead Notes' section contains a text input field and a 'POST' button. At the bottom, a navigation bar includes buttons for 'Reassign', 'Close Lead', 'Complete', and 'Send Application'.

The time clock to the right of each name has a countdown of the number of days the lead has been waiting for a response. Leads will not time out and will remain in queue unless you close the lead. Please respond to the families in Leads as quickly as possible.

For full instructions on the tools available to units and the management of Online Registration, please click on this link below,

**[ONLINE REGISTRATON UNIT GUIDEBOOK](#)**

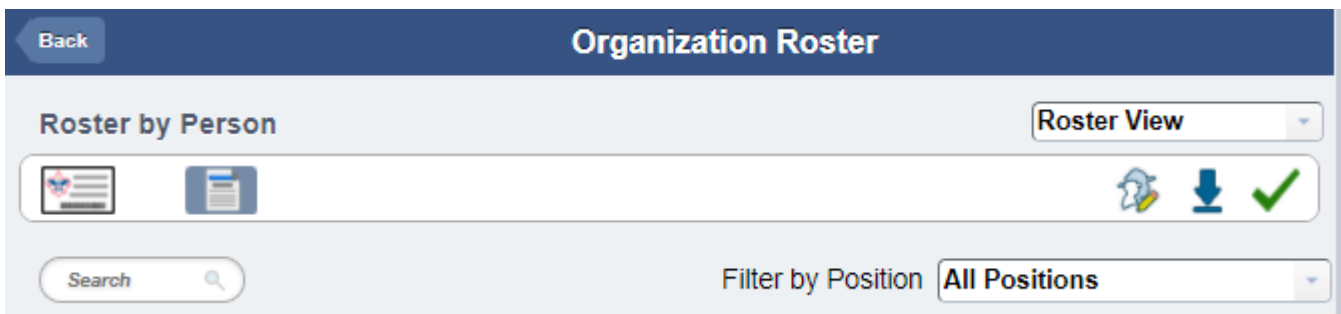


# Member Manager

There are several tools available for units in Member Manager. The Unit Key 3 and Key 3 Delegates have access to Member Manager to manage the members of the unit and make changes to phone numbers, addresses and email addresses. All changes made here will transfer to the National and Local Council's database.

## Quick Step-by-Step to Tools in Organization Roster

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, select Member Manager under the Unit Name.
3. Select either All, Adults or Youth. For a Unit Roster, select All.
4. Under Organization Roster, there are five icons in the Roster by Person menu.
5. Select one person at a time or click the Green Checkmark icon to select all.
6. Edit a person profile by selecting one person and click on the Scouts Head icon to update addresses, phone numbers and email addresses.
7. To print one membership card or all, click on the Membership Card icon.
8. To print a Youth Member Age Report, click on the Report icon.
9. To print a Unit Roster, click on the Arrow Down icon. When the roster appears on screen you can click on the Export to CSV button to download a spreadsheet of the roster.





# Organization Manager

Where the Unit Key 3 will set-up and manage their BeAScout Unit Pin and where new families searching to join scouting will see information about your unit. Make it fun, informative and keep all info up to date.

## BeAScout Unit Pin Management

### Step-by-Step to setting up your Unit Pin

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, select Organization Manager under the Unit Name.
3. Under **Settings**: You can select the type of youth applications allowed.
4. **Email Settings**: There are two emails you can set-up to automatically respond to Leads and new Applicants. **Include Fees/Fees Explanations**: You can include the any Unit Dues you collect from members per year and explain why. **Online Registration Emails**: When an online application is accepted by the unit, this email would be sent to welcome the new member. It could include things like leader contact information and an invite to any social media page the unit has.
5. Under **Unit Pin** then **Unit Information, Pin Mode**: The Council has set all units to Appear on BeAScout and to Allow People to Apply Online.
6. **Contact Information**: Units set this to the member who will be the first point of contact for new families wanting information about the unit and scouting.
7. **Unit Website**: If your unit has a website or Facebook, enter the URL here.
8. **Additional Information**: A place to add some information like usual meeting night of the week/month or activities and events that you like to do.
9. **Unit Meeting Address**: It's important to put your normal meeting address here to ensure the Unit Pin is places properly on the map.
10. **Fields to Display on Unit Pin**: Select the fields your unit wants to display.  
Above this feature is a preview of how your Unit Pin will appear on BeAScout.




# Organization Security Manager

If you need others to help with administrative roles, those people will need to be assigned a Functional Position in Organization Manager in order to allow access to additional menu tools in My.Scouting.org and Scoutbook. The Unit Key 3 will assign these roles in Organization Security Manager.

## Functional Positions

### Step-by-Step to setting up Functional Positions

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, select Organization Security Manager under the Unit Name.
3. Select a functional position and then click on the  icon and a drop-down menu will appear. Choose a person, then click on Save.



1. **COR Delegate:** Can only be chosen by the COR. This person helps the COR with online adult applications.
2. **Key 3 Delegate:** Allows up to three people access to everything.
3. **Registration Inquiry:** Allows access to Leads in Invitation Manager. Good for the New Member Coordinator.
4. **Unit Advancement Chair:** Allows access to Scoutbook & Internet Advancement 2.0.
5. **Unit Training Chair:** Allows access to Training Manager Reports.
6. **Youth Protection Champion:** Allows access to Youth Protection Training Reports.



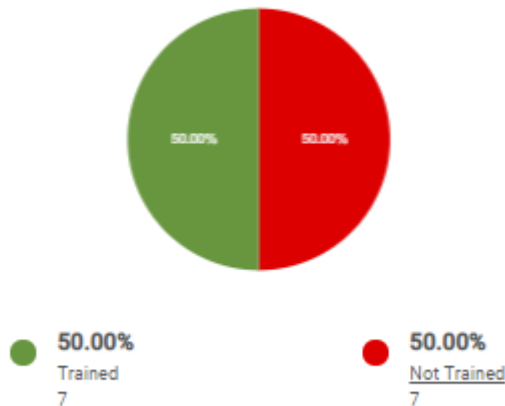
# Training Manager

There are two reports available to units in Training Manager, a Position Specific Trained Leaders Report and the Youth Protection Training Report. Units should strive to reach 100% in Trained Leaders and ensure all members stay at 100% in Youth Protection.

## Trained Leaders Report

### Trained Leaders

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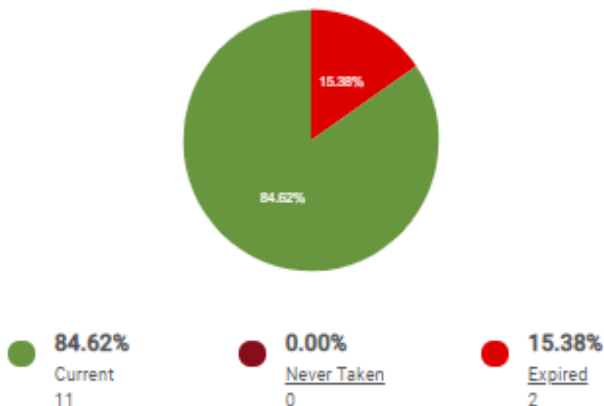


[View Position Requirements](#)

[Report](#)

### YPT

Last data refresh: 09/27/2020 at 21:50 PM



[Report](#)

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, Select Training Manager under the Unit Name.
3. Click on the **Report** button under Trained Leaders.
4. There are five choices of CSV files to choose from and one PDF file. The CSV Detail report will show you what training courses a member needs to complete to be considered 100% trained for their specific position.
5. Click on View Position Requirements for a detailed description of each training code.

## YPT Report

1. Login to [My.Scouting.org](https://my.scouting.org).
2. From the Menu, Select Training Manager under the Unit Name.
3. Click on the **Report** button under YPT.
4. There are two choices of CSV files to choose from and one PDF file. The Export to CSV report will show you the dates YPT was taken last and the dates YPT will expire for each adult member in the unit.














## Unit Tools in [My.Scouting.org](https://my.scouting.org)

The Unit Key 3 (the 'Unit Leader' (i.e. CM, SM, NL), the Committee Chair and the Chartered Org Rep) and other functional positions have access to several menu items in My.Scouting.org that will help the unit keep organized. Once you login, click on your unit in the Home Menu and a new menu below the unit name will appear.

### Let's focus on the top six tools for Units.

Click on any of the links below for step-by-step instructions on how to use each tool in My.Scouting.org.

-  Application Manager
-  Commissioner Tools
-  District JTE Data
-  District Total Available Youth
-  Finance Tool
-  Invitation Manager
-  Member Manager
-  Membership Growth Tool (Beta)
-  Organization Manager
-  Organization Security Manager
-  Training Manager

**Application Manager:** Where online applications from new youth and adults are pending acceptance.

**Invitation Manager:** Where online Leads from new youth families are waiting for a response.

**Member Manager:** Where the unit can print the unit roster, print membership cards, update member profiles with new phone numbers, etc..

**Organization Manager:** Where the unit can manage contacts, settings, the Unit BeAScout Pin, develop auto-reply emails to online applications, print the Unit Charter Certificate.

**Organization Security Manager:** Where the unit can assign functional positions to additional adult members of the unit that allow additional functions in Scoutbook and My.Scouting.org.

**Training Manager:** Where the unit can view and print Scouting Position Specific Training Reports and Youth Protection Training Aging Reports.