Setting Up a Unit in Scoutbook

1 SETUP AN INDIVIDUAL ACCOUNT

Step 1: Navigate to <u>www.scoutbook.com</u> and select the 'Sign Up' button in the top right hand corner of the screen.



Step 2: Upon clicking the 'Sign Up' button, you will be taken to the 'Get Started With a Free Trial' section of the screen to begin entering information that will be used to create your account.

- a) If you have received an invitation to join Scoutbook please indicate this by answering 'Yes' to 'Did you receive an invitation email?'. If you have received an invitation then your account has already been created and there is no need to proceed.
- b) Complete the additional fields to proceed.
- c) Prior to completing sign up, review the terms and conditions by selecting the text "I agree to the terms and conditions". Indicate you agree by selecting the check box.

d)	Click	ʻSign	Up'.
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a 📫	Did you receive an invitation email? Yes N	
	Are you a Scout or Adult? Youth	Adult
	Gender Male F	emale
	First Name	
	List Norre	
	Usemanie	
ь	Email Address	
	Zp Code	
	Password	
	Re-enter Password	
c 1	I agree to the terms and conditions	

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Step 3: Upon creation, you will receive a confirmation e-mail from info@scoutbook.com. This e-mail will contain a verification code. At times these e-mails may go into your spam or junk folders so please check all locations.

Hi Bob,	
Thanks fo address a	or signing up on Scoutbook.com! This message is being sent to confirm your email is the last step to our signup process.
To finish Sign-Up I	the signup process just copy and paste the Verification Code you see below into the Form on the website. The code is valid for the next 30 minutes.
	Verification Code:
	9A15AA)

Step 4: Copy the Verification Code you received into the Verification field. Then click 'Submit'.

Create a Free Scoutbook Account	
We just sent a verification code to your email address. Please check y	your inbox and enter the code that appears in the email.
Verification Code:	
Go Back	Submit
e 2015 Bo	y Scours of America - Privacy SCOUTBOOK

Step 5: Congratulations! Your account has been created.



2 SETUP POSITIONS AND UNITS

Step 1: From the scoutbook homepage (<u>www.scoutbook.com</u>) login by selecting the 'Login' button in the top right hand corner of the screen. If you do not have an account, select the 'Sign Up' button.



Step 2: Enter the email associated with your account and your password. If you have difficulties logging in, the "Remember my e-mail" and "Forgot password?" functions are available to help you out.

🛆 User Login	
user2@asynchrony.com ×	
nent I Remember my email	s and more.
Login	
Forgot password? Sign up	

Step 3: Once you are logged in, click on My Dashboard. This is the area you will work in most of the time tracking advancement, training, adding events, and managing your roster.

≡	<	Scoutbook 🤇	3	Q
—	My Dashboard		:	>
9	Blog		(>
\square	News		(>
_1	Videos		:	>
:=	Forums		;	>
ø	Directory		;	>
D	References		;	>
<i>مر</i>	Help		;	>
	e 2016 Bo	(Souts of America - Privacy)		

Step 4: To setup your unit for the first time, you need to define your current positions. Select the 'My Account' to begin.

≡ <	ណ	My Dashboard			Ð
Ad	ministra	tion			
	Ιγ Αςςοι	unt	1 4		>
My F	amily			My Units	

Step 5: Select 'My Positions' to add your current positions & Roles to your account.

😑 🤇 🏠 🖻 My Account	
Add a short bio about yourself.	
Email	user2@asynchrony.com
Password	******* >
Edit Profile	>
My Service Log	0 >
My Camping Log	0 >
My Hiking Log	0 >
My Positions	0 >

Step 6: To setup your positions select the 'Add' button. As a reminder, you must have at least one unit leader position in Scoutbook to add your unit.

🗮 🤇 🏠 🛅 My Profile My Scouting Positions	
My Scouting Positions	
If you are a leader in Cub Scouts or Boy Scouts use this page to enter all your volunteer positions. This will help others to identify you better on Scoutbook and allows you access to position specific features. This section is also a great way to keep track of your experience in Scouting (tenure).	
+ Add	Tenure: 4374 days

Step 7: Enter the details of **ONE** of your volunteer unit positions.

- a) Select your Council.
- b) Select the appropriate Unit Type and enter the Unit Number
- c) Select one of your unit positions.
- d) Enter the Date Stated by setting a date using the calendar.
- e) Before clicking 'Update', make sure you have checked the 'I agree to join the unit leader roster' box.
- f) Click 'Update'

\equiv <	ഹ	—	My Profile	My Scouting Position
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Enter the details of one of you are coming soon. By entering a new provide the position.	ur volunteer unit positions. If you have more than one p u will automatically join the adult roster of the coorespond	osition submit each one separately. District, council, regional and national position ing unit. Unit Admin leaders will be able to view and edit your profile data and training
Council:	3	Longs Peak Council
Unit Type:		•
Unit Number:		
Position:	C	~
Date Started: 1	d	100 (100)
Date Ended:		(1,1) (30)
Optional Notes:		
I agree to join th	e unit leader roster	
I agree that I will be joining the a password.	adult leader roster for the unit selected above and that unit administ f	rators will have limited access to my profile. These administrators will not have access to my
	Update	Cancel

Step 8: You will see your Position(s) Displayed under my Current Positions and Roles. To add additional positions/roles select the 'Add' button and repeat the steps above.

If you are a leader in Cub Scouts or Boy Scouts use this page to enter all your volunteer positions. This will help	AT \$CO.
others to identify you better on Scoutbook and allows you access to position specific features.	The second se
This section is also a great way to keep track of your experience in Scouting (tenure).	
+ Add My Current Positions & Roles	Tenure: 4374 days
Committee Chairman Pack 123 Jan 14, 2016	68d
Committee Training Coordinator 🥏 🔱 Pack 0 Jun 26, 2015	270d
Pack Admin 🦿 🦁 💩	270d

3 CREATE UNIT SUBSCRIPTION

3.1 TRIAL SUBSCRIPTION

Step 1: Once you are logged in and have created your unit position(s), click on My Dashboard.

≡	<	Scoutbook	0 0	ર
=	My Dashboard		,	•
9	Blog		,	•
\square	News		,	•
	Videos		,	•
:=	Forums		,	•
Ø	Directory		,	•
D	References		,	•
ىر	Help		3	•
	• 2016 ***	Boy Scouts of America - Privacy SCOUTBOOK		

Step 2: To setup your trail subscription, select the 'My subscription' link to begin.

📃 < 🎧 🖻 My Account	
Add a short bio about yourself.	
Email	user2@asynchrony.com
Password	********* >
Edit Profile	>
My Service Log	0 >
My Camping Log	0 >
My Hiking Log	0 >
My Positions	0 >
My Training	59% >
My Awards	>
My Connections 📎	0 >
My Subscriptions	0 >

Step 3: Scroll down until you see the subscription for your program type. Select the 'See Pricing/Start Trial' button to continue.

Pri	icing based on size of pack. Pay for what you need and not a penny more.*
Tra pa	ack as many dens as you need. It's unlimited. This subscription covers the entire ck.
Yo	pur pack will get their very own private discussion board.
Im	port and Export to Internet Advancement
Cr	eate purchase orders and shopping lists
Pa	irents, grandparents, and other leaders can all connect to your Scout's records
Co	onnected users can leave comments, upload and share photos and videos
Ab	ility to approve the requirements that parents and Scouts check off.
We on	orks on mobile and tablet devices like iPad, iPad Mini, iPhone, iPod, Android and desktop computers.
FR	REE 30 day fully functional trial. Try it and see if you like it.
Scouts	must come from a single pack. Create one subscription for each pack. Sold in blocks of 5.

Step 4: In order to complete your trail setup:

- a) Select your unit
- b) Enter the # of Scouts in that unit by selecting the appropriate option from the dropdown.
 Consider selecting a few more Scouts than currently registered to allow room to grow. During the trial period there is no fee.
- c) Click the "Create" button to continue.

Select Pack:	Pack 4 Longs P (create FRE	eak Council EE 30 day trial)	\bigcirc
You are setup as a lea nake changes to this l	ader with the packs list.	shown above. Visit your Positions page to ad	d a new pack of
	12		
# Scouts in b	-	up to 55 - \$55/year	×

Step 5: Once you have created your unit subscription the following message will be displayed.



Step 6: Once you have updated your subscription, navigate back to your Dashboard. Your will see a subscription icon displayed next to the unit you have updated.

Email	user2@asynchrony.com
Password	******** >
Edit Profile	>
My Service Log	0 >
My Camping Log	0 >
My Hiking Log	0 >
My Positions	0 >
My Training	(5 9%) >
My Awards	>
My Connections 📎	0 >
My Subscriptions 🚆 🚺 6	1 >

3.2 MANAGE SUBSCRIPTION

Step 1: To manage your subscription Scroll down until you find the unit plan you wish to update. For this example I will use a Troop so I will select the 'Manage Troop Subscriptions' button.

Shawn Test Subscription Owner	^
Тгоор	Troop 187
Scouts	2 of 40
Expired	Feb 25, 2014
Shawn, thanks for trying out our Troop PlanI We hope you have enjoyed the 30 day free trial. Need any changes to this subscription or have questions? Just contact us .	Ļ
Manage Troop Subscriptions	

Step 2: Once you are within the subscription details:

- a) Select your unit
- b) Choose if you want to add more scouts or Pay for another year. The system will default to 'Renew another year'
- c) Select the number of scouts in your Unit
- d) If you have received a Promotion code from your Council you should enter it at this time.
- e) Then select 'Renew' to proceed with the change.

📃 🤇 🎧 🛅 My Profile T	roop Subscriptions
2	Longs Peak Council This troop has an expired subscription which ended on 2/25/2014. Select this troop to renew it another year. This subscription currently has a approved Scouts out of a maximum of 40.
	Troop 887 Longs Peak Council This troop has an existing subscription which ends on 12/31/2016. Select this troop to extend it another year or to add more Scouts to your current subscription. This subscription currently has 28 approved Scouts out of a maximum of 100.
0	Troop 0 Longs Peak Council This troop has an existing subscription which ends on 11/11/2016. Select this troop to extend it another year or to add more Scouts to your current subscription. This subscription currently has 5 approved Scouts out of a maximum of 12.
You are setup as a leader with the troops s	nown above. Msit your Positions page to add a new troop or make changes to this list.
What would you like to do?	• 🕒
O Renew another year	
Add more Scouts	
# Scouts in Troop: 🗲 🖒	up to 40 - \$40/year 🗸 🗸
If you need more contact us	
Promotion Code:	
Ren	w Cancel

3.2.1 Add more Scouts to Trial

Step 3a: Once you have selected to 'Add more Scouts to Trial' additional fields will be displayed allowing you to select the number of scouts you wish to add. Select 'Add' to proceed with the change.

What would you like to do?				
Renew another year				
O Add more Scouts				
How many Scouts would you like to add? The cost to add more Scouts to your existing subscription is \$1/Scout. 5 Scouts - \$5.00 ↓				
Add Cancel				

Step 4a: You will receive a confirmation stating the scout(s) have been added to your subscription.



3.2.2 Pay for one year

Step 3b: Once you have selected to 'Pay for one year' and select the number of scouts you wish to add. If you have received a promotional code from your council please enter prior to submitting your request. Select 'Renew' to proceed with the change. If you have entered a promotional code please skip to <u>Review Unit Subscription</u> section as your subscription has been paid.

What would you like to do?					
O Pay for one year					
Add more Scouts to trial					
# Scouts in Troop:	up to 40 - \$40/year 🗸 🗸				
If you need more contact us	If you need more contact us				
Promotion Code: 💿					
	Renew		Cancel		

Step 4b: You will receive a message stating you are being redirected to PayPal to complete the transaction.

or	qa.scoutbook.com says:	×	SA E
S S	You are about to be redirected to PayPal. After your payment please DO NOT close the window as you will be returned to Scoutbook to finalize your subscription.		
	ОК]	new

gs Peak Council

roop has an existing subscription which ends on 12/31/2016. Select this troop to extend

Step 5b: Once in PayPal you will see the summary of your order and with the total cost.

Descriptions	A
Descriptions	Amount
1 Year Scoutbook.com Connected Troo. Item price: \$40.00 Quantity: 1	<u></u> \$40.00
Item total	\$40.00
	Total \$40.00 USD

3.2.3 Review Unit Subscription

Step 6: Once you have updated your subscription, navigate back to your Dashboard. Your will see a subscription icon displayed next to the unit you have updated.

Shawn Test Subscription Owner	1
Тгоор	Тгоор 0
Scouts	6 of 12
Expires	Nov 11, 2016

4 IMPORT ROSTER FROM SCOUTNET

Step 1: To finish the unit setup you have one more step. From your profile page you will want to select 'Edit Pack' to finalize the setup.

Ξ	<	G	My Dashboard	O
		?	Have you seen our Getting Started FAQ? Dismiss Tip	
	Admi	inistrat	ion	
A.	My	Accou	nt	>
			Add/Track a Scout	>
	Mess	ages		

Step 2: Select 'Roster Import' to import information from ScoutNet.

×		
_		
There are no Scouts assigned		
Lo Add Scout		
Scouts (0) There are no Scouts assign		

Step 3: Select the ScoutNet Option from the list. This will import all of your scouts and advancements into your unit roster.

inapproved. To approv	ve a Scout just edit his profile and confirm all his and other leaders of the pack only see roste	his contact info is complete and r users that are approved.
	NEED TO IMPORT YOUR ROS	TER? ×
	Search our FAQ Forum for the keyword import.	
Leaders (1)	🛱 Scouts (0)	
Leaders (1) test user1 Pack Admin, Com	Scouts (0)	Uts assigned
Leaders (1) test user1 Pack Admin, Com	Scoutbook CSV	uts assigned
Leaders (1)	ScoutNET Scouts (0) Scoutbook CSV 3 PackMaster 3	Add Scout

Step 4: At the bottom of your unit page, you will see the ScoutNet information. Enter your ScoutNet information. If you do not have your ScoutNet information, please contact your Unit Chair, Unit Leader, or Council Service Center and they will be able to provide this for you. Click the 'ScoutNET Roster Import' button to proceed.

Pack 7	
ScoutNET Unit Number:	0007
ScoutNET Unit	123456789
ScoutNET Unit Password:	•••••
	ScoutNET Roster Import

Step 5: Once the import is complete you will be taken back to the unit roster. Where you can review the data imported.

≡ <	ណ		Pack 7	Roster
				Pack 7 🗸
Because unappro correct.	e you are wed. To a Scouts, p ers (1)	a Pack A approve a arents a	Admin 🎤 a Scout just and other lea	you see all leaders and all Scouts both approved vand t edit his profile and confirm all his contact info is complete and aders of the pack only see roster users that are approved.
T	test use Pack Admir	er1 滑	ee Member	Luke Jones S Tiger Den 1 CURRENT RANK: Bobcat
			2	Add Leader Robbie Green Volf Den 1 CURRENT RANK: Tiger