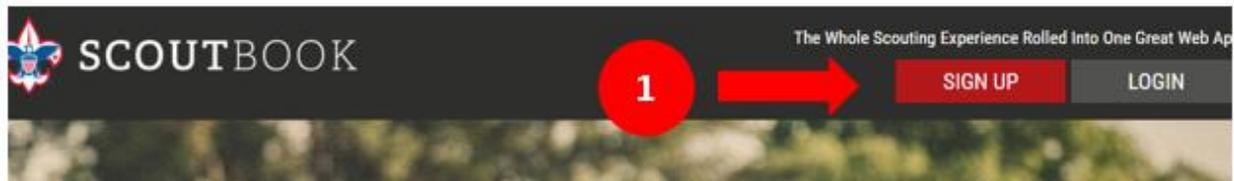


# Setting Up a Unit in Scoutbook

## 1 SETUP AN INDIVIDUAL ACCOUNT

**Step 1:** Navigate to [www.scoutbook.com](http://www.scoutbook.com) and select the 'Sign Up' button in the top right hand corner of the screen.

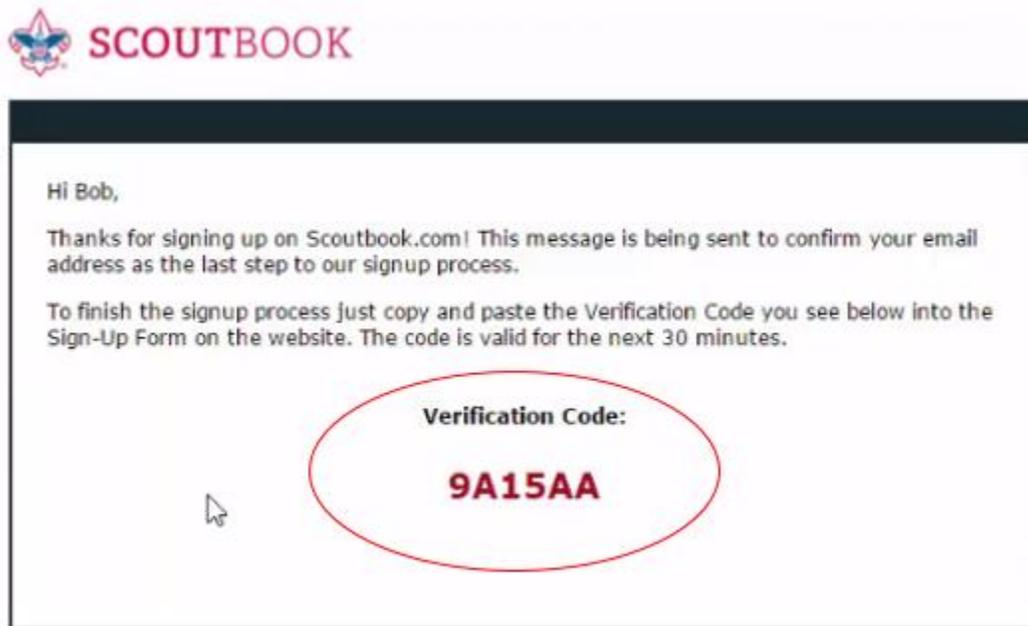


**Step 2:** Upon clicking the 'Sign Up' button, you will be taken to the 'Get Started With a Free Trial' section of the screen to begin entering information that will be used to create your account.

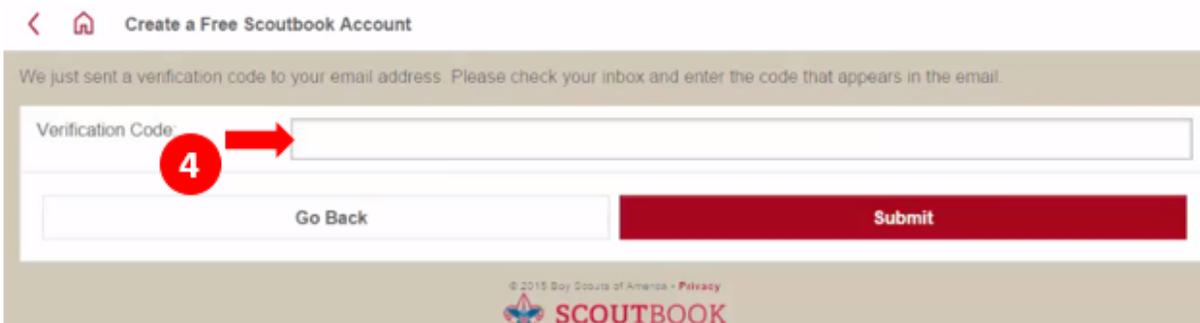
- If you have received an invitation to join Scoutbook please indicate this by answering 'Yes' to 'Did you receive an invitation email?'. If you have received an invitation then your account has already been created and there is no need to proceed.
- Complete the additional fields to proceed.
- Prior 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.
- Click 'Sign Up'.

A screenshot of the "GET STARTED WITH A FREE TRIAL" sign-up form. The form is dark with white text and input fields. At the top, there is a red circle with the number "2" and a red arrow pointing to the right. Below the header, there are four sections of the form, each with a red circle and letter annotation: "a" points to the "Did you receive an invitation email?" question with "Yes" and "No" radio buttons; "b" points to the "Are you a Scout or Adult?" question with "Youth" and "Adult" radio buttons; "c" points to the "I agree to the terms and conditions" checkbox; and "d" points to the "SIGN UP" button at the bottom. The form also includes fields for "Gender" (Male/Female), "First Name", "Last Name", "Username", "Email Address", "Zip Code", "Password", and "Re-enter Password".

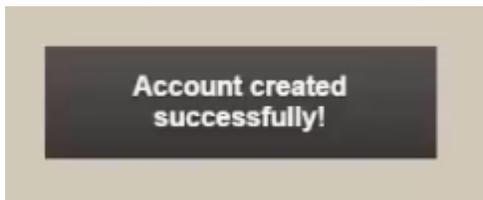
**Step 3:** Upon creation, you will receive a confirmation e-mail from info@scoutbook.com. This e-mail will contain a verification code. At times these e-mails may go into your spam or junk folders so please check all locations.



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



**Step 5:** Congratulations! Your account has been created.

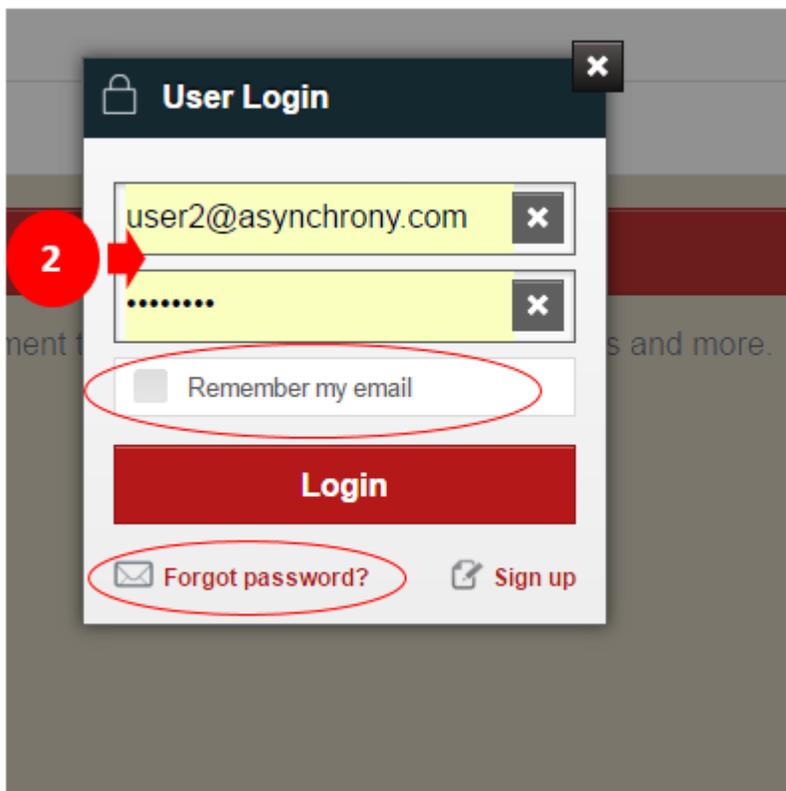


## 2 SETUP POSITIONS AND UNITS

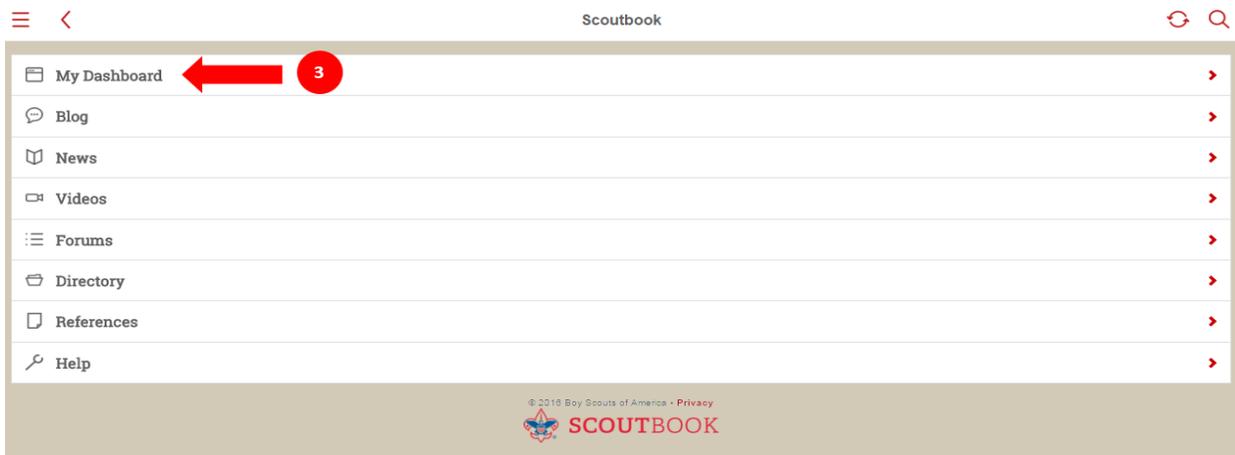
**Step 1:** From the scoutbook homepage ([www.scoutbook.com](http://www.scoutbook.com)) login by selecting the 'Login' button in the top right hand corner of the screen. If you do not have an account, select the 'Sign Up' button.



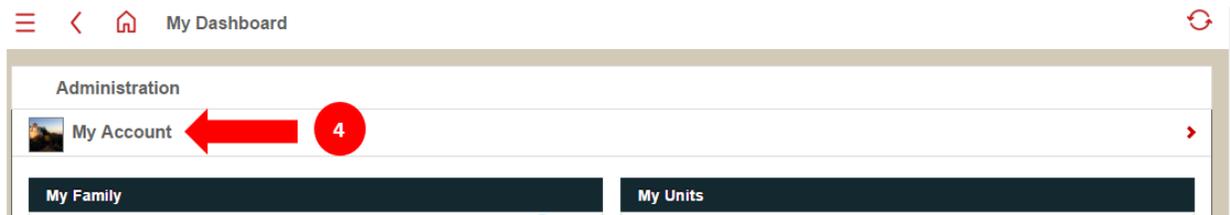
**Step 2:** Enter the email associated with your account and your password. If you have difficulties logging in, the "Remember my e-mail" and "Forgot password?" functions are available to help you out.



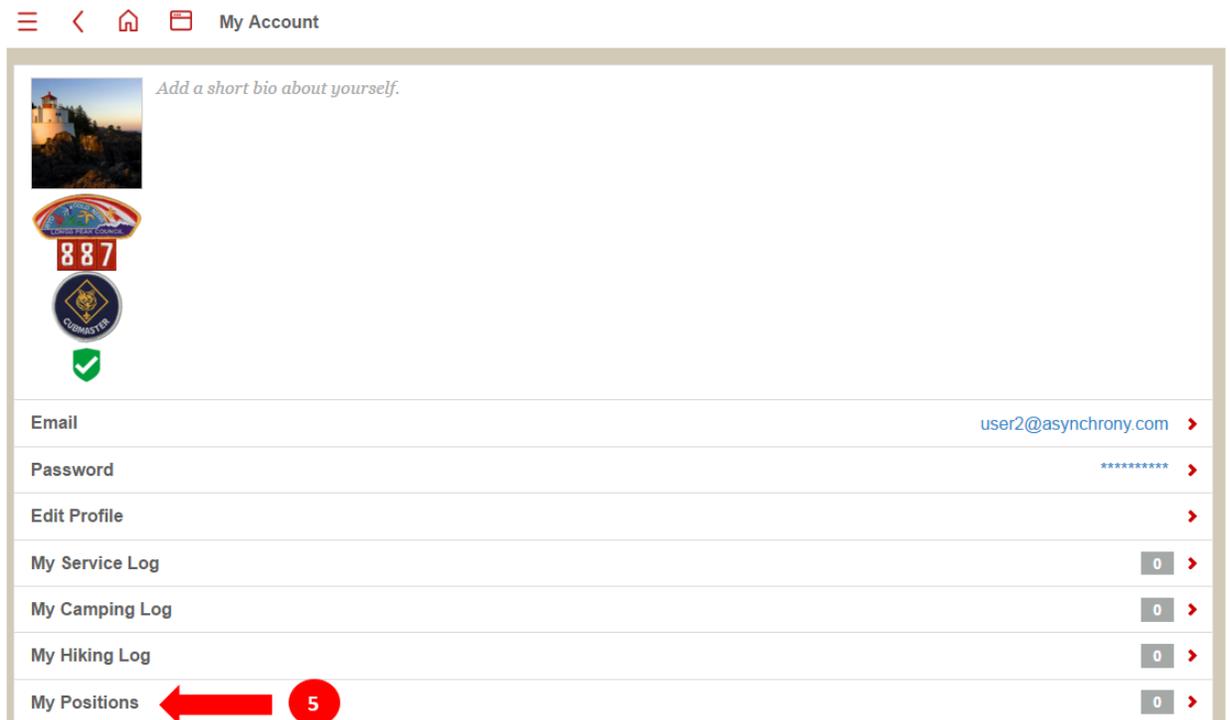
**Step 3:** Once you are logged in, click on My Dashboard. This is the area you will work in most of the time tracking advancement, training, adding events, and managing your roster.



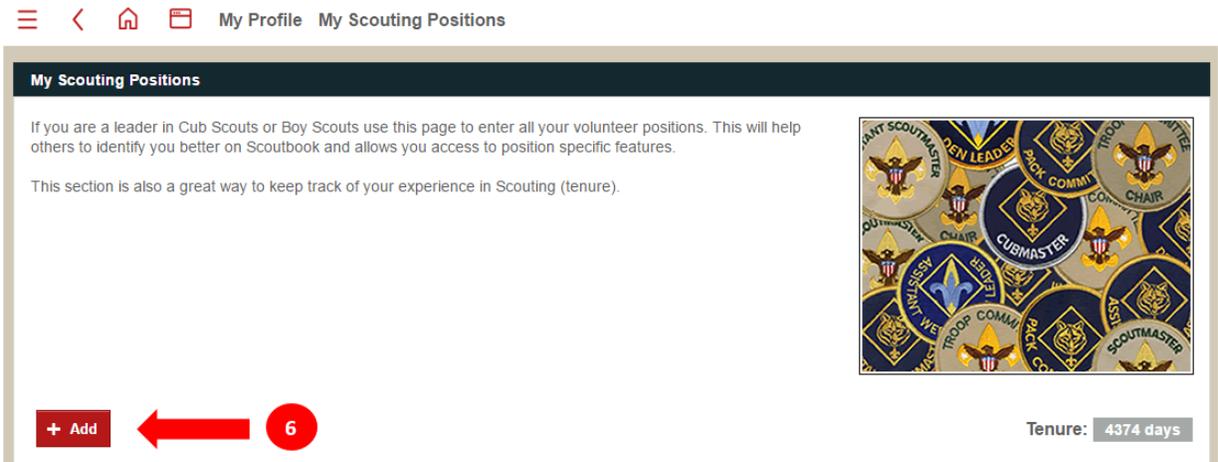
**Step 4:** To setup your unit for the first time, you need to define your current positions. Select the 'My Account' to begin.



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

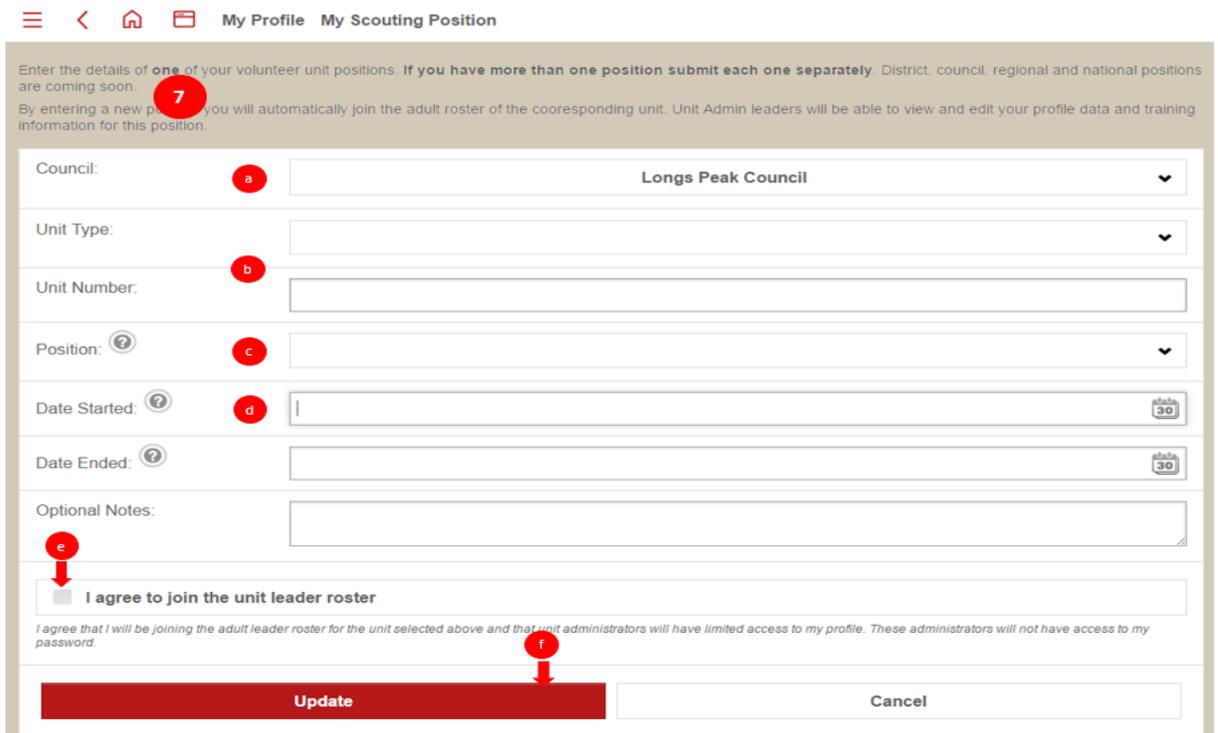


**Step 6:** To setup your positions select the 'Add' button. As a reminder, you must have at least one unit leader position in Scoutbook to add your unit.

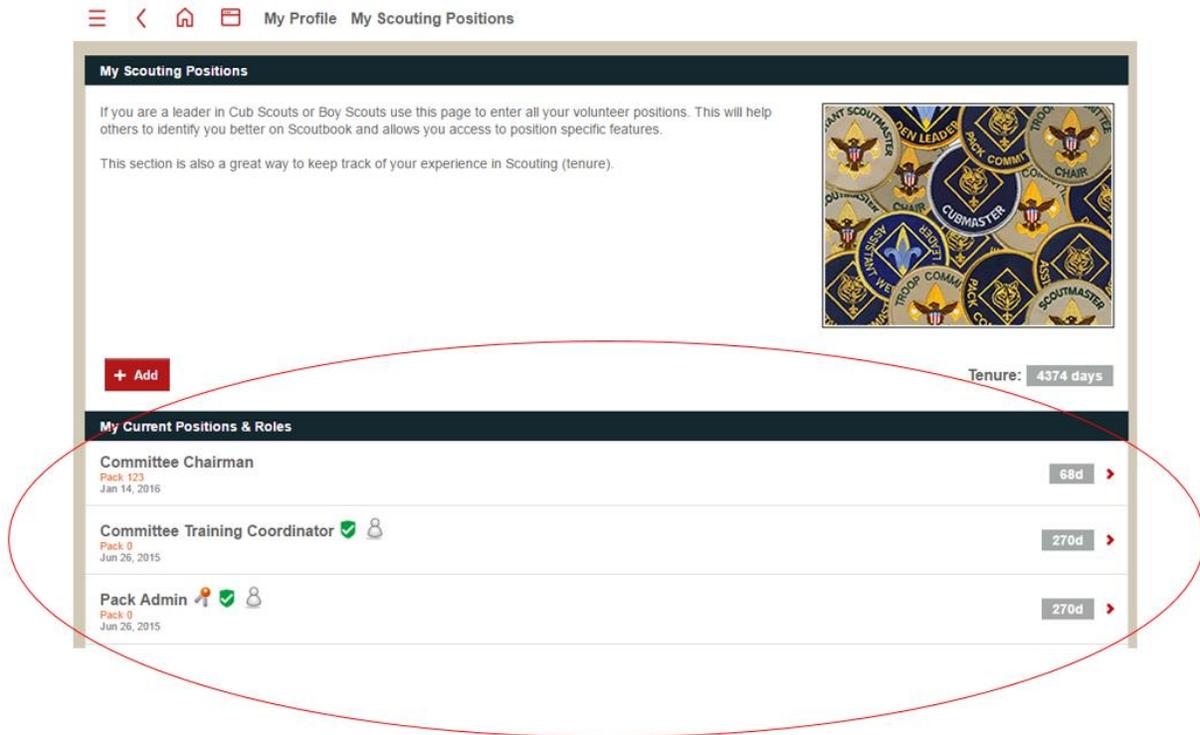


**Step 7:** Enter the details of **ONE** of your volunteer unit positions.

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



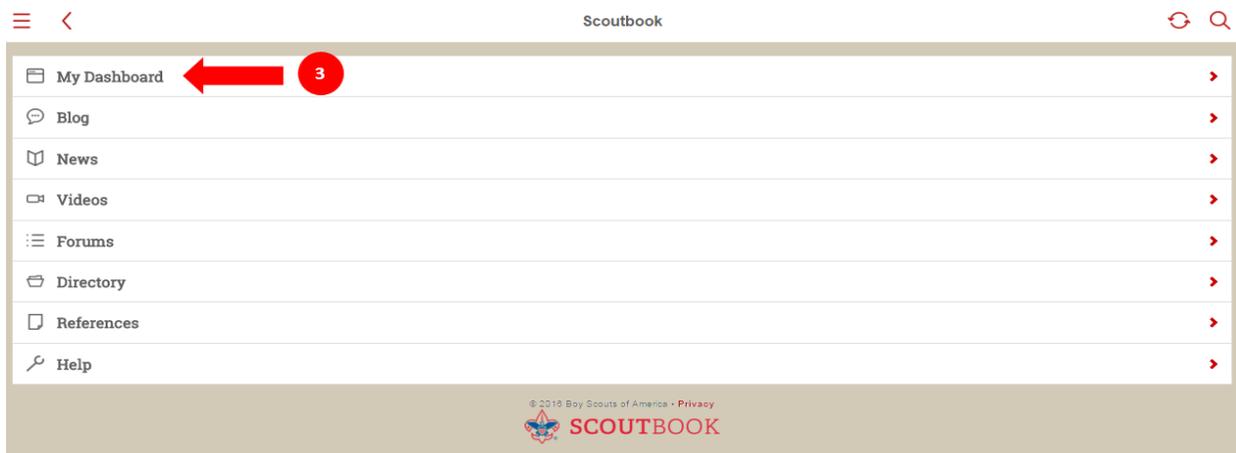
**Step 8:** You will see your Position(s) Displayed under my Current Positions and Roles. To add additional positions/roles select the 'Add' button and repeat the steps above.



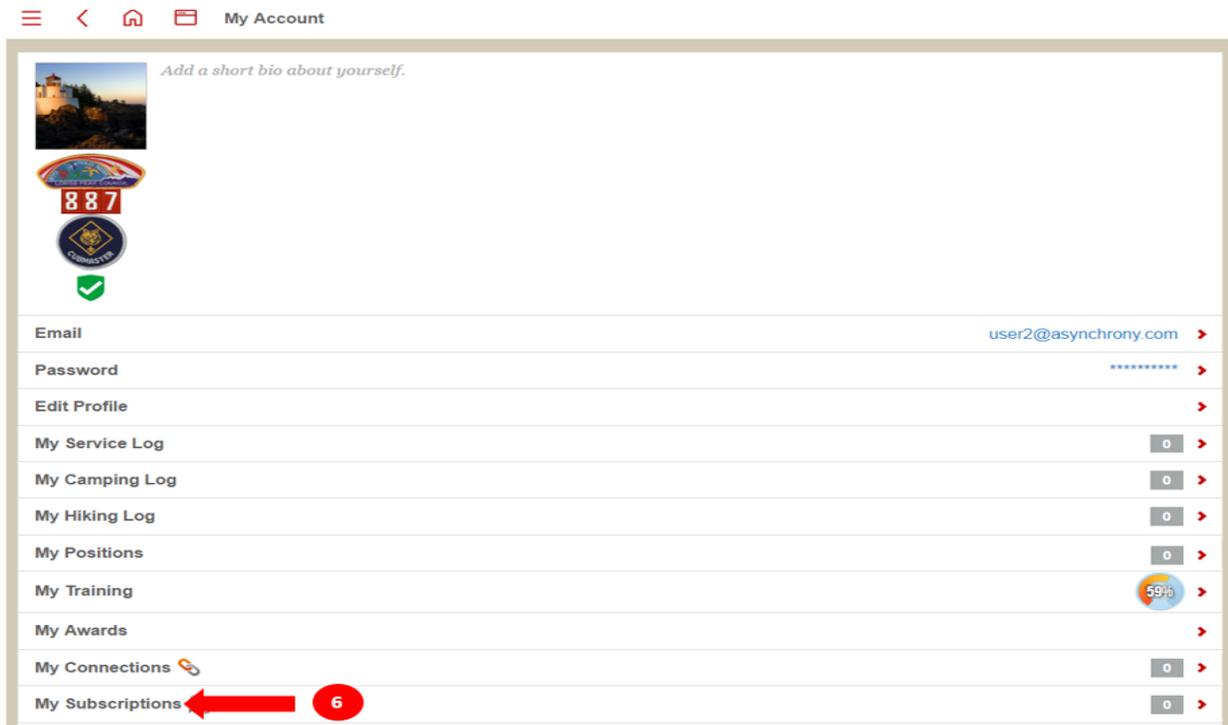
## 3 CREATE UNIT SUBSCRIPTION

### 3.1 TRIAL SUBSCRIPTION

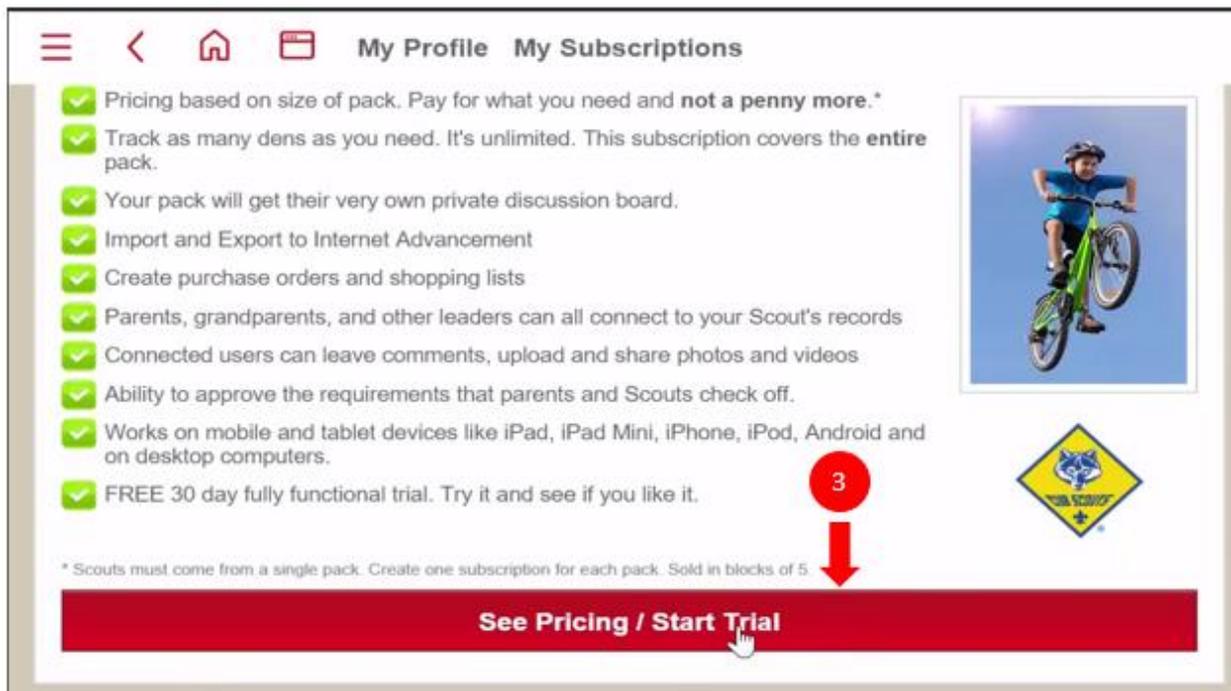
**Step 1:** Once you are logged in and have created your unit position(s), click on My Dashboard.



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

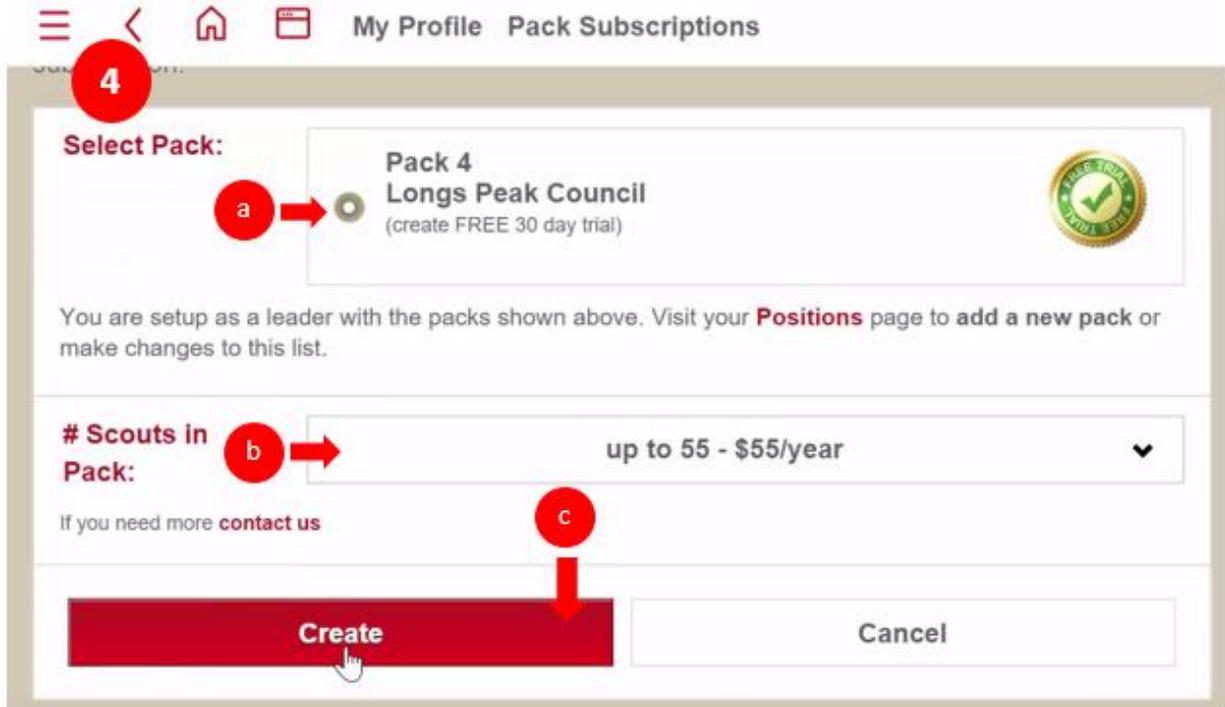


**Step 3:** Scroll down until you see the subscription for your program type. Select the 'See Pricing/Start Trial' button to continue.

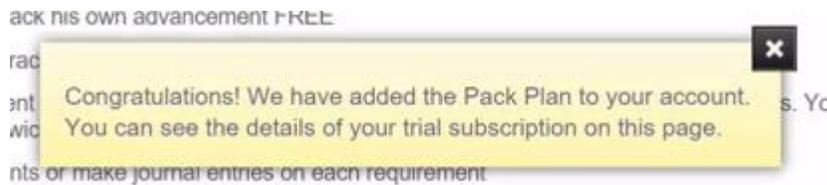


**Step 4:** In order to complete your trail setup:

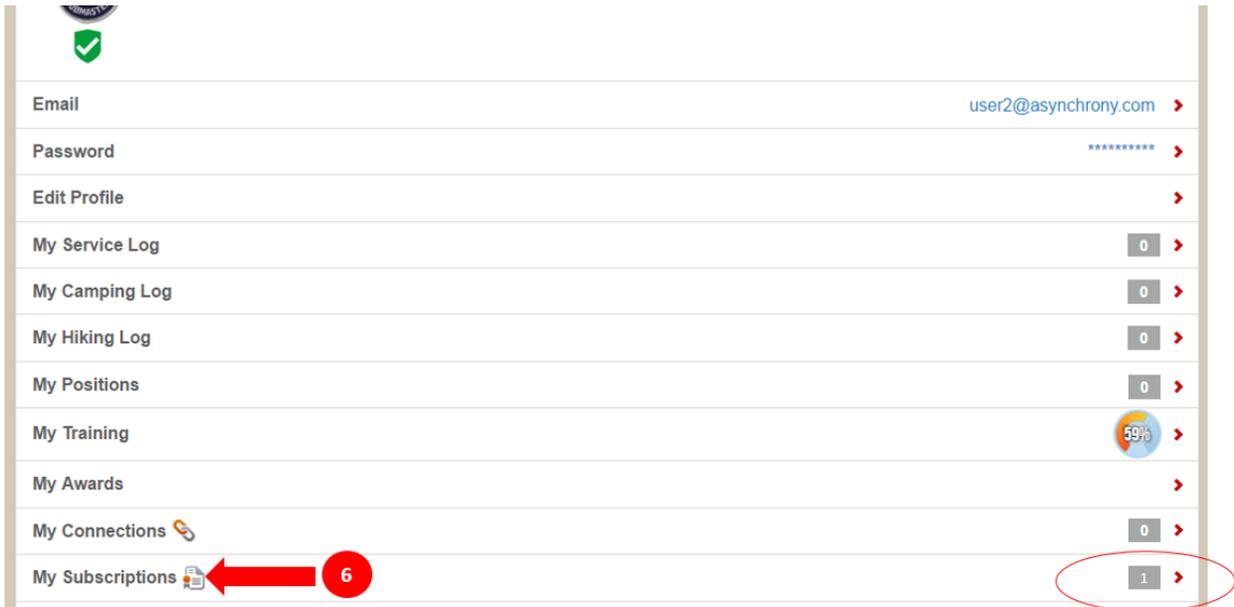
- a) Select your unit
- b) Enter the # of Scouts in that unit by selecting the appropriate option from the dropdown. Consider selecting a few more Scouts than currently registered to allow room to grow. During the trial period there is no fee.
- c) Click the "Create" button to continue.



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

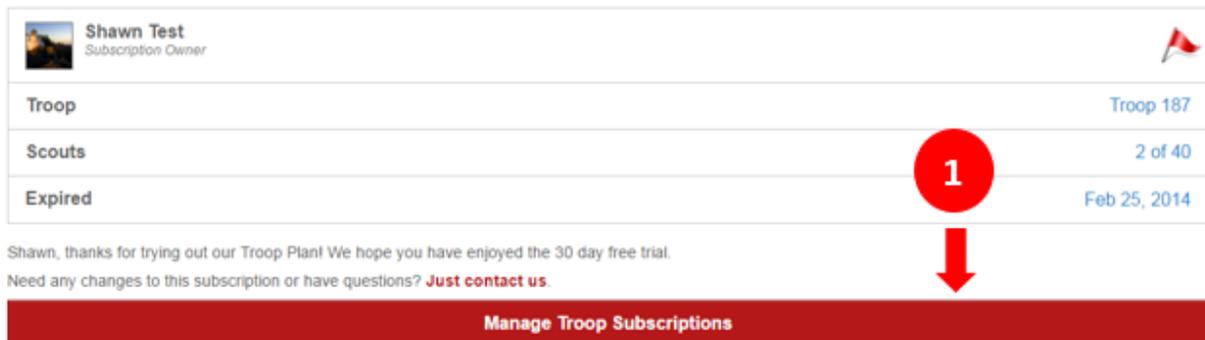


**Step 6:** Once you have updated your subscription, navigate back to your Dashboard. You will see a subscription icon displayed next to the unit you have updated.



### 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.



**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.

The screenshot shows the 'Troop Subscriptions' page. At the top, there are navigation icons and the text 'My Profile Troop Subscriptions'. Below this, there are three subscription entries for 'Longs Peak Council':

- 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 2 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.
- 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.

Below the list, there is a note: 'You are setup as a leader with the troops shown above. Visit your **Positions** page to **add a new troop** or make changes to this list.'

The main form area is titled 'What would you like to do?' and contains the following elements:

- Radio buttons for 'Renew another year' (selected) and 'Add more Scouts'.
- A dropdown menu for '# Scouts in Troop:' with the value 'up to 40 - \$40/year'.
- A text input field for 'Promotion Code:' with a help icon.
- Two buttons: 'Renew' (highlighted in red) and 'Cancel'.

Red callouts with letters a-e point to specific elements: '2' points to the first subscription entry, 'a' points to the radio button for 'Renew another year', 'b' points to the 'What would you like to do?' heading, 'c' points to the '# Scouts in Troop:' dropdown, 'd' points to the 'Promotion Code:' input field, and 'e' points to the 'Renew' button.

### 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.

The screenshot shows the 'Add more Scouts' form. It contains the following elements:

- Radio buttons for 'Renew another year' and 'Add more Scouts' (selected).
- A heading: 'How many Scouts would you like to add?' followed by the text: 'The cost to add more Scouts to your existing subscription is \$1/Scout.'
- A dropdown menu showing '5 Scouts - \$5.00'.
- Two buttons: 'Add' (highlighted in red) and 'Cancel'.

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

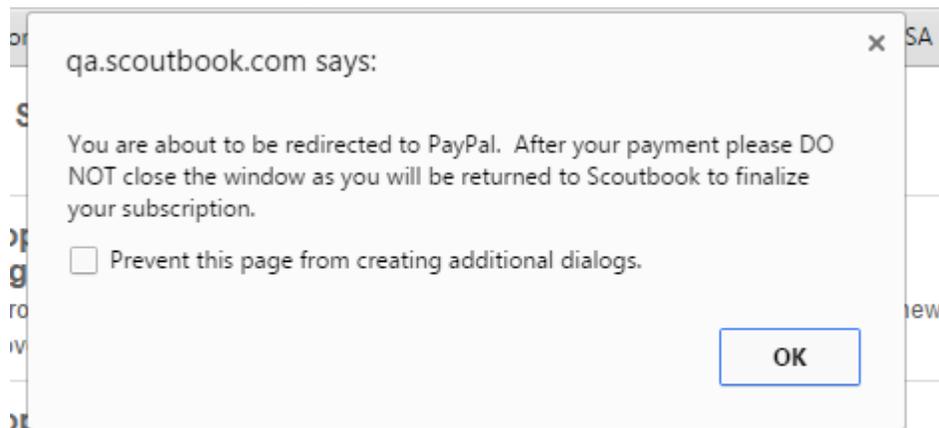


### 3.2.2 Pay for one year

**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 [Review Unit Subscription](#) section as your subscription has been paid.

A screenshot of a web form titled "What would you like to do?". It has two radio button options: "Pay for one year" (which is selected) and "Add more Scouts to trial". Below this is a dropdown menu for "# Scouts in Troop:" with the value "up to 40 - \$40/year" and a downward arrow. A link "If you need more contact us" is below the dropdown. There is a "Promotion Code:" label with a question mark icon and an empty text input field. At the bottom are two buttons: a red "Renew" button and a white "Cancel" button.

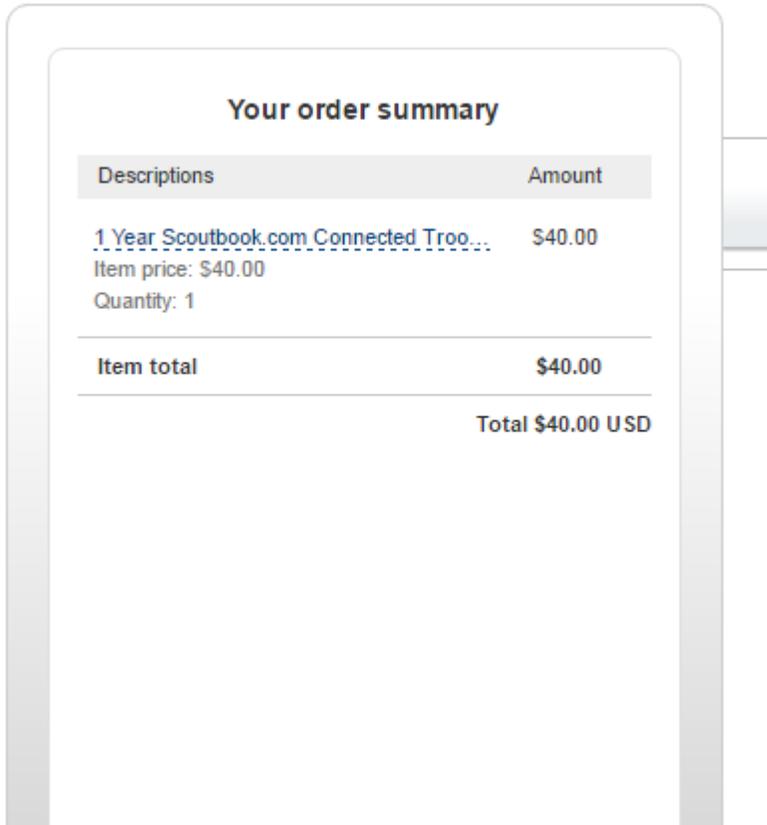
**Step 4b:** You will receive a message stating you are being redirected to PayPal to complete the transaction.



**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.



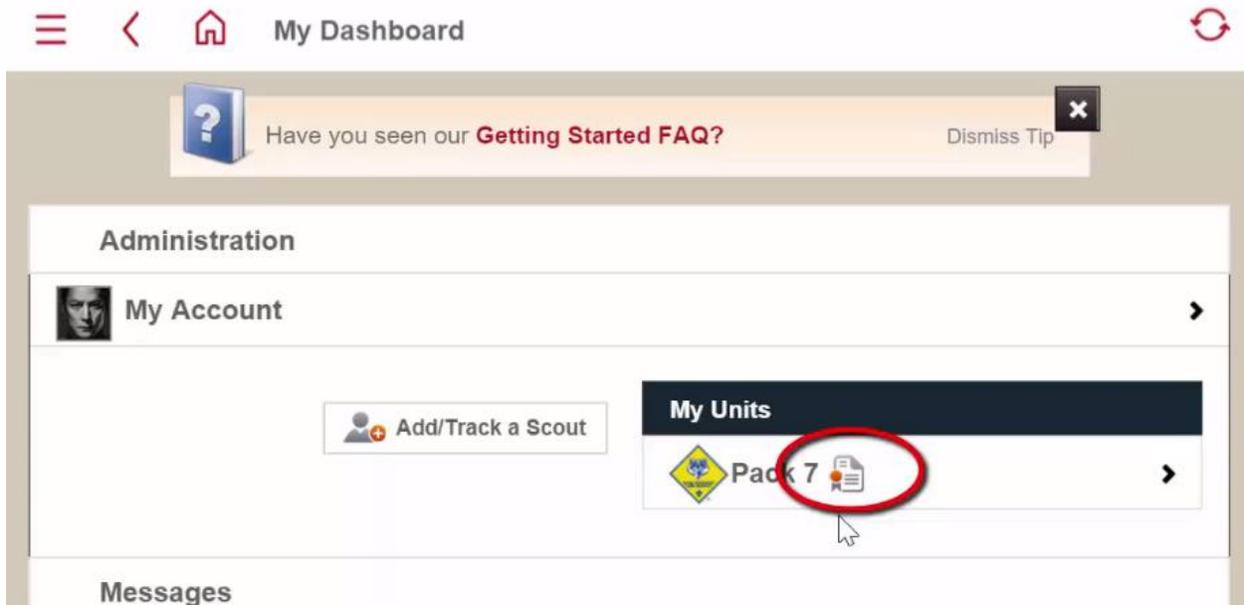
### 3.2.3 Review Unit Subscription

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

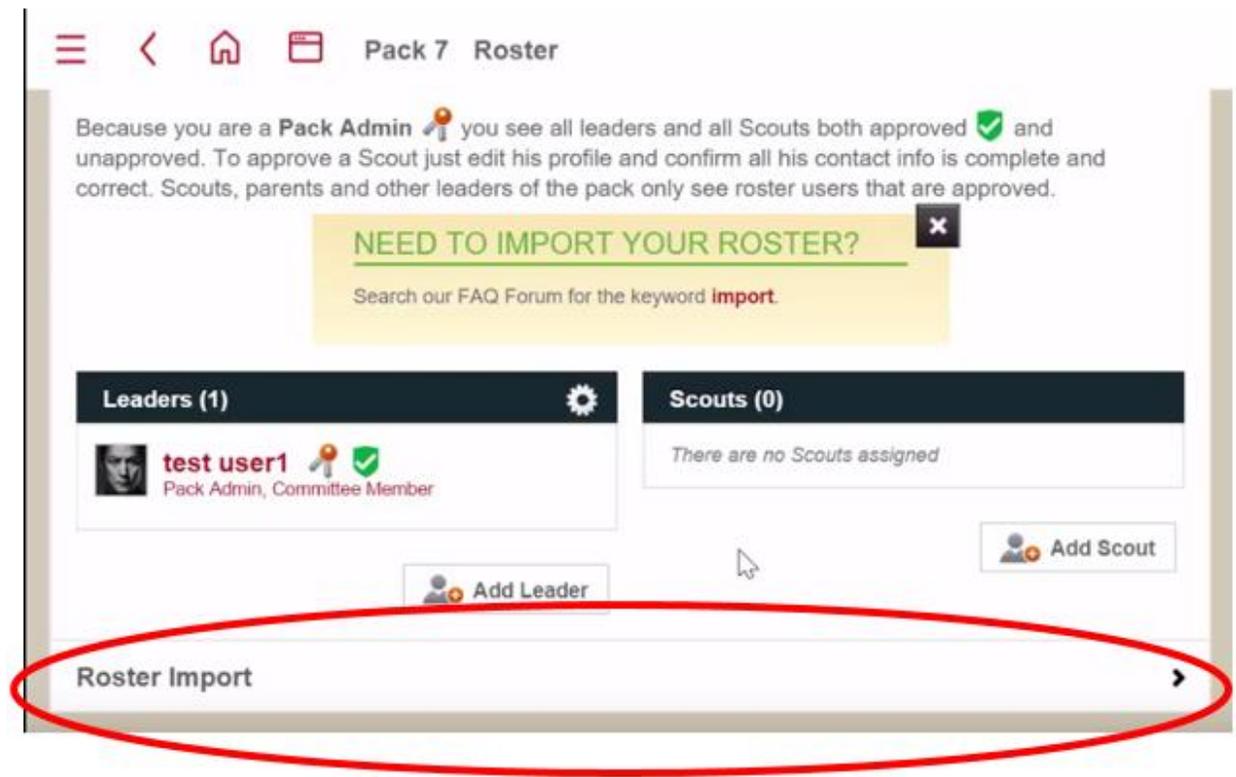
 <b>Shawn Test</b> <i>Subscription Owner</i>	
Troop	Troop 0
Scouts	6 of 12
Expires	Nov 11, 2016

## 4 IMPORT ROSTER FROM SCOUTNET

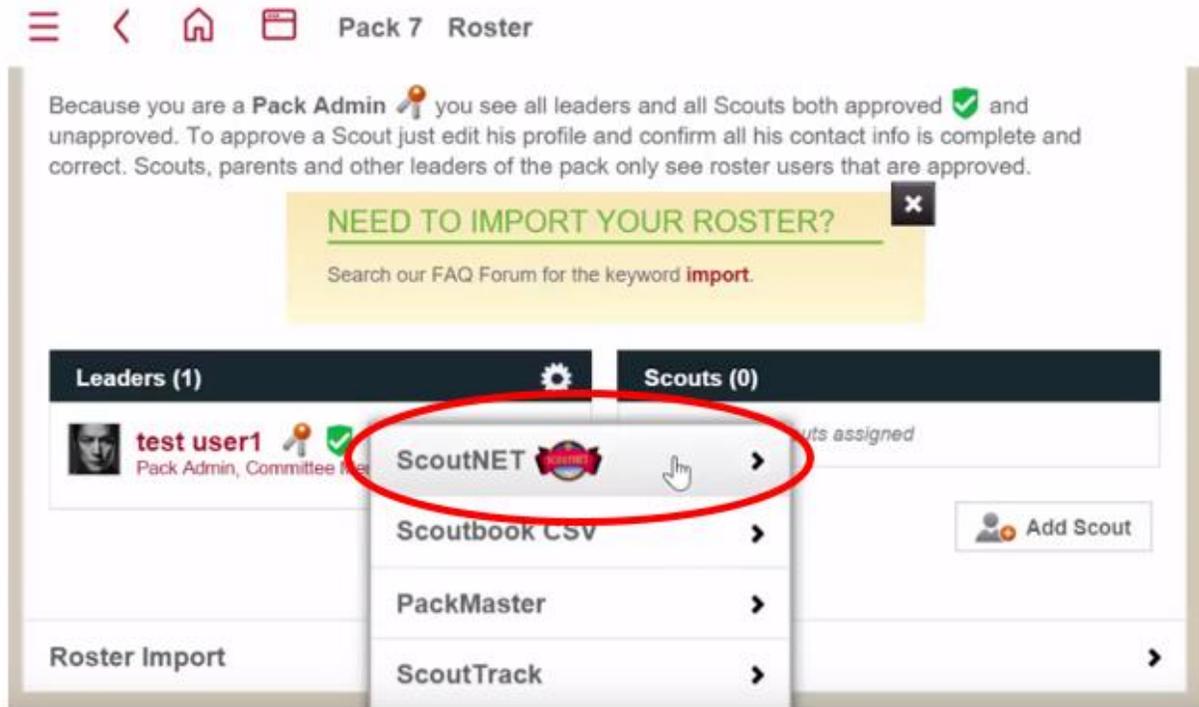
**Step 1:** To finish the unit setup you have one more step. From your profile page you will want to select 'Edit Pack' to finalize the setup.



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



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



**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 ID: 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.

