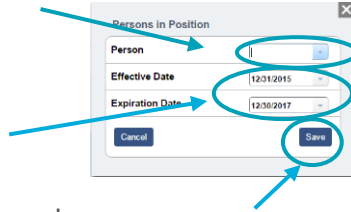**Step 6:** Select the **person** from the drop-down menu. Only adults registered in your unit will show.

- You can set effective and expire dates for this role. Default is the unit effective and expire date.

Step 7: Save. It may take overnight before the person assigned shows as a delegate in that position.

INVITATION MANAGER

KEY UNIT ROLES AND ACTIONS IN INVITATION MANAGER

The following unit positions have full access to the Invitation Manager Dashboard on My.Scouting where they can add leads, manage inquiries from prospective Scouts, and send joining invitations:

- Chartered organization representative (CR)*
- Committee chair (CC)*
- Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach)*
- Institutional Head/Chartered Organization Executive Officer (IH)
- New Unit Coordinator

  * = Members of the Unit Key 3

The Unit Key 3 can assign a "Registration Inquiry" functional role to other unit volunteers who need read only access to view lead status and submitted requests.

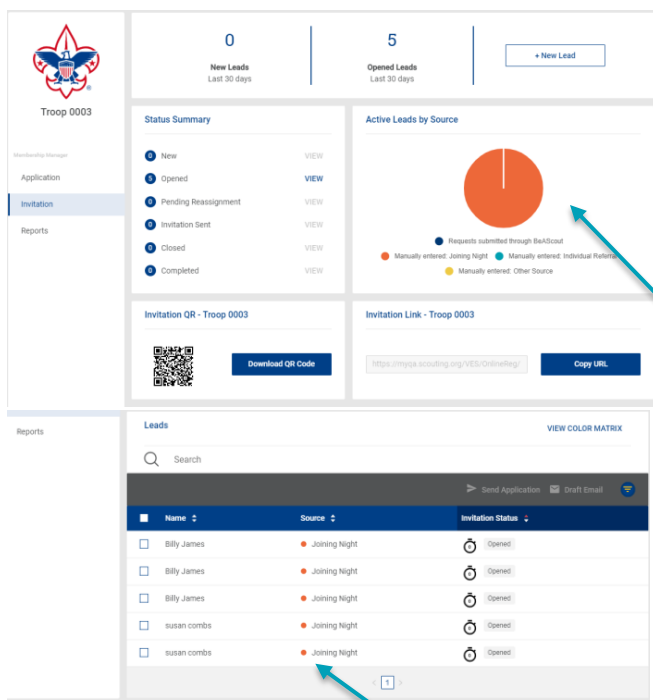### USING INVITATION MANAGER - OVERVIEW

To view and act on an inquiry that has been submitted to your unit, you'll want to log in to my.scouting.org .
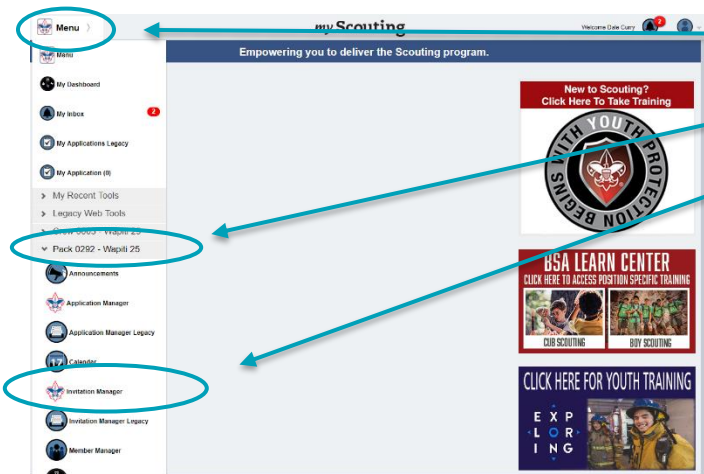
Step 1: Select Menu in the upper left corner.

Step 2: Select your unit.

Step 3: Select Invitation Manager from the drop-down list.

The top section of the dashboard provides a quick status overview of the number of leads/requests submitted over the last 60 days that are either:

- **New** – the lead originated in BeAScout and nobody in the unit has opened this record;
- **Opened** – someone in the unit has opened the lead or has entered the lead manually, but no invitation has been sent.

The pie chart may be empty (or dark blue) when you first access this tool, but in this example, we'll identify what each colored section means.

Hovering over each color in the pie chart displays the number of active requests in that category.

- Blue = requests submitted through BeAScout.
- Orange = manually entered from joining night.
- Teal = manually entered from an individual referral.
- Yellow = manually entered from a source other than those listed above.

The colors in the pie chart correspond to the colored circle next to the person's name in the **Leads** section at the bottom of screen.

- The default for the bottom LEADS section is to display New & Opened requests, those in Pending Reassignment and those for which an Invitation was sent. But Closed and Completed leads can be added by clicking on the filter function on the grey ribbon.
- Those awaiting action the longest will appear at the top.
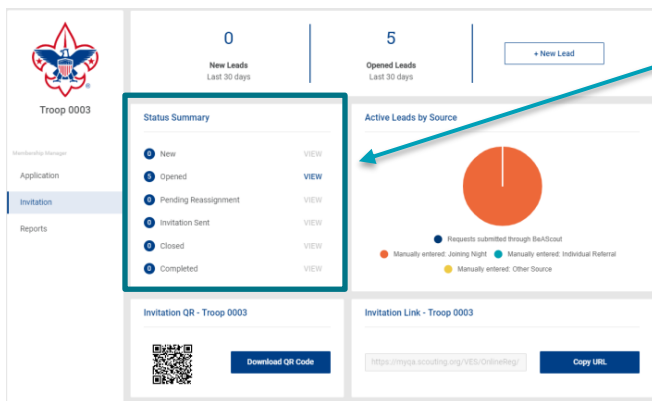
The **Status Summary** displays the number of requests that fall under the following statuses:

- **New** - request from BeAScout that has not been opened.
- **Opened** - request has been viewed or entered manually.
- **Pending Reassignment** - request has been sent to the district to be moved to a different unit.
- **Invitation Sent**
- **Closed** - requests either timed out after 60 days of inaction or it was manually closed by the unit.
- **Completed** - an invitation has been sent and opened and the person has initiated an online application.

If an invitation is not sent within 60 days, the lead will go to Closed status and no longer show in Leads.

USING URL'S AND QR CODES

URL's and QR codes provide links that are specific to each unit. These can be used on handouts, fliers, and unit emails that are not sent through Invitation Manager.

PROCESSING LEADS

To access the URL or QR code select the URL or QR code button. When you press the button, it will automatically save it as a temporary copy. Just go to the document you wish to paste it in and select paste.
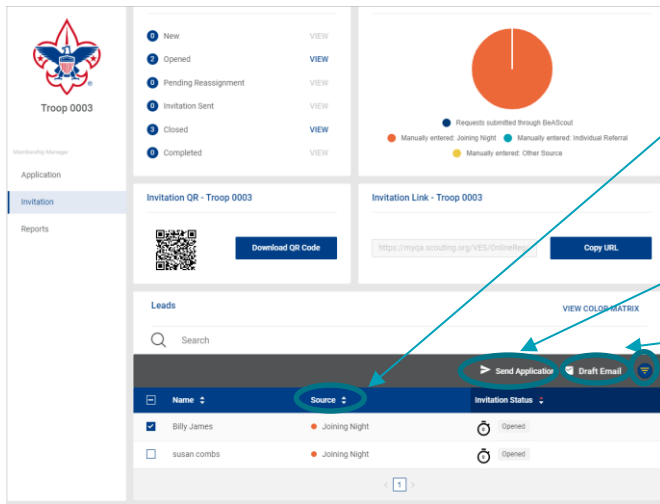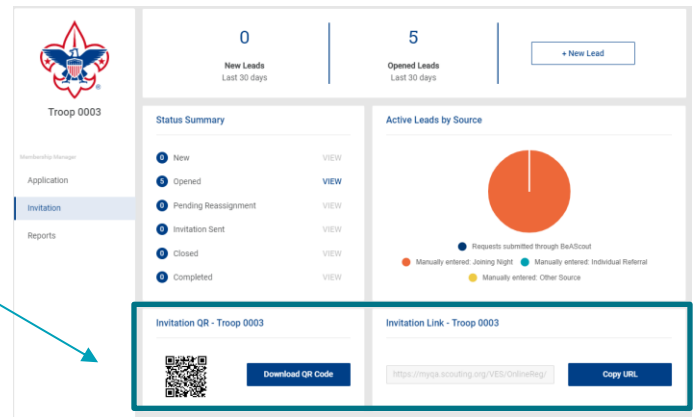

The **Source** column allows you to sort the Leads by the source through which they were received. This allows you to process from specific sources easily.

The **Send Application** button allows you to send applications to more than one person at a time.

The **Send Email** button allows you to send a message to one or more selected leads.

The **Filter** icon allows you to filter this list by:
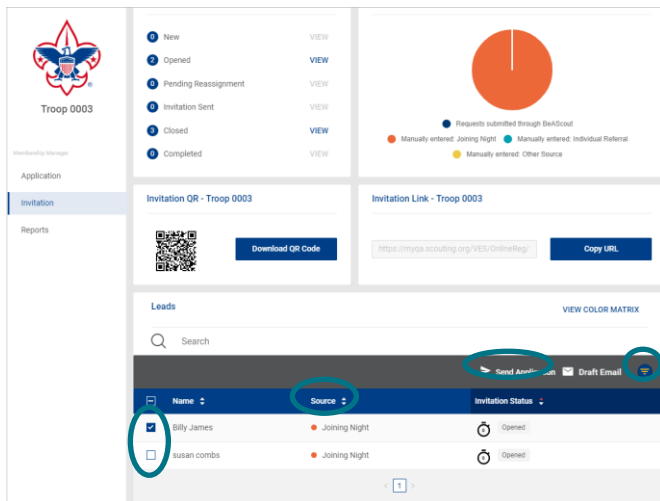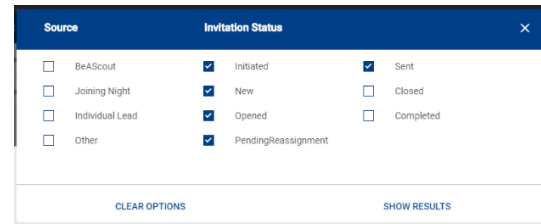
EXAMPLE: If you have a joining night and you want to send the application to everyone attending that night…

- First, sort by Source using the up or down arrows next to the word Source or use the filter.

- Next, select the boxes next to the leads to which you would like to send an invitation.

- Then, click on the send applications icon in the grey ribbon above the lead list.

You will see a notification of which leads received invitations after you click the send inviation button.
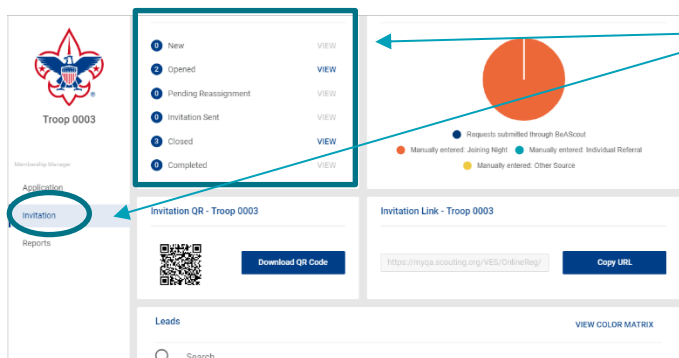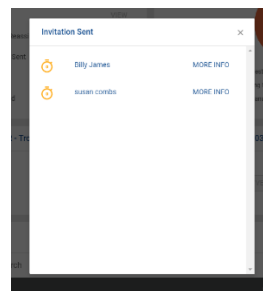
When you select the **Invitation** button on the menu to the left, your screen will refresh, and you will see the number next to the **Invitation Sent** category increment by the number of invitations just sent and the new and/or opened will decrease by the same number.
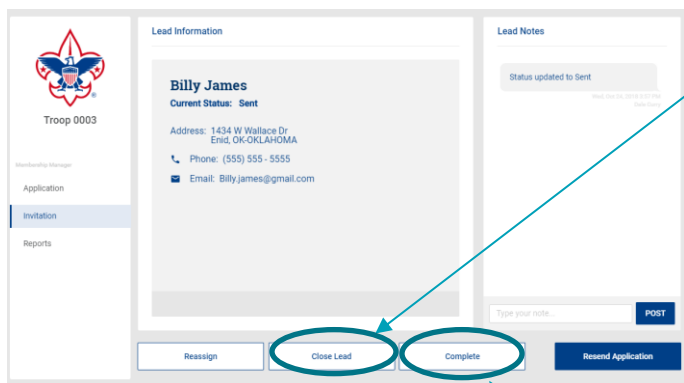
Close Lead. You would use this button if:
- You already have a paper application for this lead.
- You have talked with the person and they no longer want to join your unit.

Selecting **Close Lead** will remove the request from your leads list and place it in the Closed category in the Summary section of your dashboard.

You can always reopen the closed request which will return it to your leads list.

To Close a Lead:
Select the lead you would like to close from the list and select the **Close Lead** button. You will get a warning asking if you are sure you to close the lead.

Complete a Lead:
After you receive a completed application from the lead you should go back to the lead and indicate it is complete to clear it from your lead list.
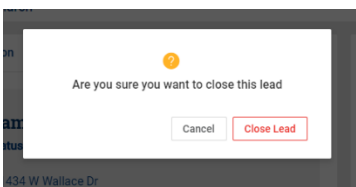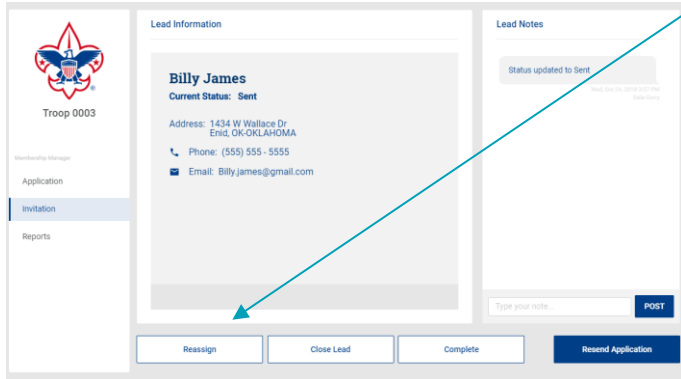
Reassign the Lead:

Select the reassign lead button if the application needs to be reassigned to another unit.

- The request is moved to the District's dashboard so that they can find another unit to take the request.
- You will be prompted to select a reason as to why the request is being reassigned.
- The request will be placed in the Pending Reassignment category under your By Status tab. This helps in the event the requestor contacts you to follow up on their inquiry.
- Once the District takes an action to reassign the request to a different unit, the request will be removed from your Pending Reassignment.
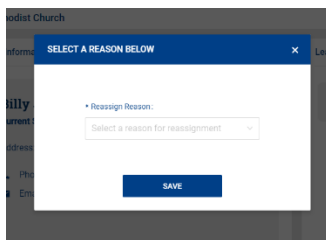
## ADDING LEADS MANUALLY **Step 1**: Select **+New Lead.**	
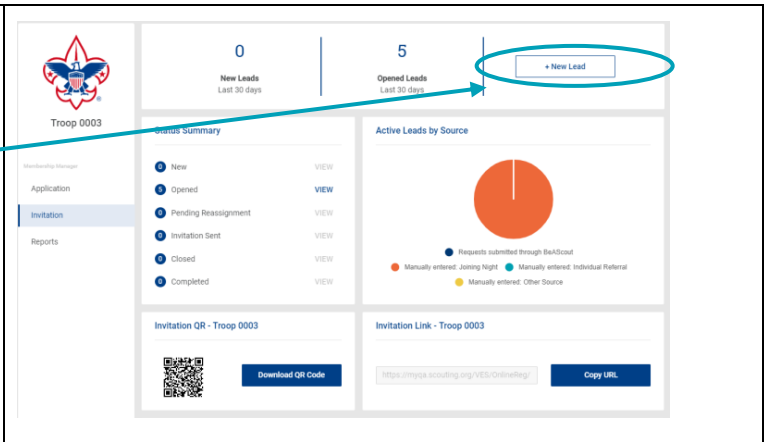
Lead Source

Step 2: Select the **Lead Source** from the dropdown list. This can be Joining Night, Individual Lead, or Other.

* Lead Source: [Lead Source ▾]

Parent / Guardian / Volunteer Information

Step 3: **Enter information** in each required field.

* First Name: [First Name]

* Last Name: [Last Name]

Suffix: [Choose Suffix ▾]

* Email Address: [Email]

* Phone Number: [Phone Number]

Country: [USA ▾]

Address Line 1: [Address Line 1 ●]

Address Line 2: [Address Line 2]

City: [City ●]

State/Region: [Choose State/Region ▾]

ZIP Code: [ZIP Code ●]

Step 4: Save.   If you are using this as your sign-in for a joining night you have the option of pressing save and add which will save and clear the form for the next entry.

[SAVE AND ADD ANOTHER] [SAVE] [SEND APPLICATION]

Step 5: Send Application.
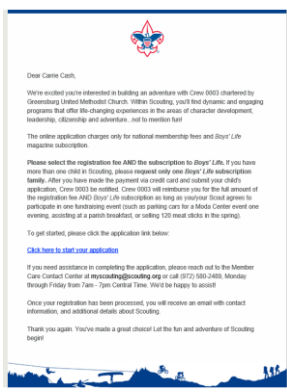
An invitation will be sent to the requestor and you will be returned to invitation dashboard.