

Basic overview of invitation manager

Invitation manager is a tool to collect information for potential new scouts for your unit from BeAScout, manage leads from joining nights and from individual referrals. Allows you to send invitations directly to interested families with a **link to an application that is specific to your unit.**

- 1) Logon to your my.scouting.org account (*this is the same site that you take youth protection training*)
- 2) Click on MENU (*top left hand-side of screen*)
- 3) From the drop-down menu select the unit for which you want to process leads for.
- 4) Select INVITATION MANAGER

Processing leads in invitation manager

- a) Scroll to bottom of dashboard to see leads.
- b) You will now see a summary screen of the leads.
- c) Select the one or more leads that you would like to send the invitation to with a link to an application that is specific to your unit.
- d) Select send application.

Adding new leads to invitation manager

- i. Click on +NEW LEAD (*top right-hand section of dashboard*)
- ii. Add the parent name (first and last), email address and phone number and the SAVE (*this is a good option for a joining night where you can collect information as the families walk in and enter right into invitation manager, and when you are ready you can send the invitation to all the families that attend*)
- iii. Go to back to processing leads for instructions on sending the an invite.

Obtaining your QR Code and URL

- a. In the dashboard you will see your units unique QR Code and URL
- b. Click on download to download the QR Code which will allow you to save the image in a destination of your choice.
- c. To obtain the URL specific to your unit select copy URL an save the URL in a destination of your choice.

For more detailed information watch the videos for Invitation manager at

<https://www.scouting.org/resources/online-registration/>