Online Registration Manual

for Troop Leaders

A step-by-step guide on how to use the Membership Registration System as provided by Girl Scouts of Rhode Island (Special thanks to Girl Scouts of Southern Nevada for their support in creating this manual).

March 2012

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What is the Online Registration System and what can it do for me?

It is a collection of online tools and functions that allow you, the customer, to take advantage of online registration via the web.

This system will improve the Girl Scouts of Rhode Island's technical capabilities and make it possible for GSRI and its members to work together at maintaining and organizing valuable data.

A member will be able to:
- Manage their member profile with up-to-date information
- Renew their Girl Scout membership
- Make a contribution to the Girl Scouts

A Troop Leader can:
- Manage her Troop Member's addresses and contact information
- Update her Troop Meeting location and time
- Print up-to-date Troop Rosters
- Print Girl Scout membership cards for her Troop Members
- Email all Troop Members with a few clicks

… And so much more!!

How to Submit Your Volunteer Position

When a customer purchases a membership for the first time, or a registered member is renewing their current membership, every person is given a default **Position** in Girl Scouts. Girls hold the position of **Girl Member**, and Adults hold the position of **14 - Member (No Assigned Position)**.

Members who have been approved as Troop Leaders have the ability to manage their Troop meeting information and register their members for Activities. The ability to do these actions is based on having the position of **01 - Leader/Advisor** identified on their record.

If you renewed your membership online or if you started with a position of "14" at the beginning of the year and have since completed the process in becoming a Leader, you have the ability to self-report your position using this system to alert the council that your record needs to be updated. You can also use this method to report ANY new position you've been approved for. Positions such as Troop Committee Members and Service Unit Team Members are some examples.

Important: Any position that requires paperwork and/or proper training must be approved by the council in order to be considered "Active" in that position. Self-reporting **DOES NOT** automatically add the position to your record and must be marked as "Active" by the council before accessing Troop Leader actions.
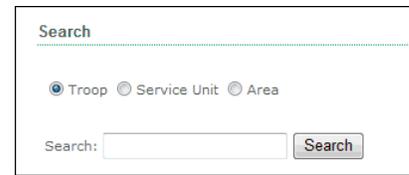
How to add a position to your record:

1. From the "Contact Information" page in "My Account", scroll down to the **My Positions** section near the bottom of your screen.


2. Select the appropriate option from the **Position** drop-down menu.

3. Select the appropriate option from the **Year** drop-down menu.

4. In the **Troop/SU/Area** line, click **Search** and a pop-up screen will display.

5. Select the option where the new position will be held. You may only choose either **Troop** or **Service Unit**. Positions for **Area** are currently not in use in GSRI.

6. In the **Search** box, type all or part of the name for the applicable Troop or Service Unit. Click Search.

   a. **Troops** follow the naming convention of "TroopXXXXX" – Troop followed by 5 digits with no spaces. Examples: "Troop00700" or "Troop00020"

   b. **Service Units** follow the naming convention of "SUXXX" – SU followed by 3 digits with no spaces. Examples: "SU601" or "SU655"

   If you are **unsure** of your Troop or Service Unit numbers, contact your Membership Specialist at the council.

7. Click **Search**. A list of possible matches will appear. Select the appropriate option.
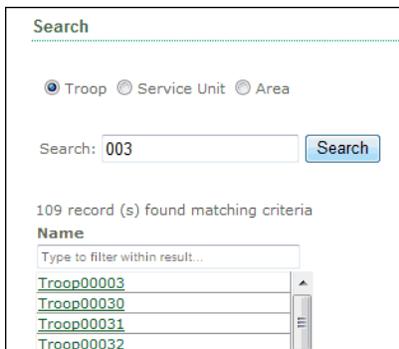
8. Once the all the fields are filled in, click **Add Position**.

9. You will see the added position on your record with a status of **Pending**. Only the council may approve of any self-reported positions. Once approved, the status will change to "Active."

Year	Troop/SU/Area	Position	Status	
	15 Years – Membership Numeral Guard	RECIPIENT	Active	
	20 Years – Membership Numeral Guard	RECIPIENT	Approved	
	Outstanding Leader	RECIPIENT	Active	
	Outstanding Volunteer	RECIPIENT	Active	
2012	Troop00033	01 - Leader/Advisor	Pending	Delete

If there was an error in the position was added, you may click **Delete** to the right of the new position and repeat the above steps to add the correct position.

The "Troop Management" Page

Once you have been approved as a Troop Leader, you will notice a few changes on your account:

- Your position of "01" will be reported as **Active** on your "My Account" page.
- You will see your **Troop number** at the top-right of the screen next to your name.
- An additional option to the menu on the left-side of the screen in the sidebar.

Position	Status
01 - Leader/Advisor	Active

Home
My Account
Become a Member
Make a Contribution
Program Activities & Events
Camp Activities
Adult Training & Events
Troop Management
Shopping Cart
Contact Us

With the active position, you will be able to access the **Troop Management** page from the menu.

From here, you will be able to:

- Switch between your multiple troops
- Manage your Troop Member's addresses and contact information
- Update your Troop Meeting location and time
- Print up-to-date Troop Rosters
- Print Girl Scout membership cards for your Troop Members
- Email all Troop Members with a few clicks

Updating the Troop Meeting Information

One of the features offered is the ability to update troop meeting information. Key volunteers and council staff regularly rely on this information supplied by the Troop Leader.

It is recommended that meeting dates and meeting times, as well as the **full and complete address of the meeting location** be entered.

1. On the **Troop Management** page, select the appropriate Troop (if you have more than one Troop) and click on the **Meeting Information** link below the Troop name and number of members.
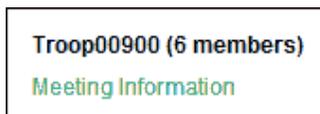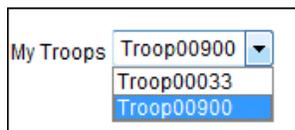
2. You will then be directed to the **Meeting Info** page.

3. Under the **Troop Type and Meeting Information** section, you are encouraged to fill out all fields:

Troop Type & Meeting Information

Troop Participation	Troop
Troop Duration	8-12 months
Program Frequency	Weekly
Grade Level	Grades K - 1 (Daisy)
Meeting Place	School

    a. **Troop Participation**: Select **Troop**

    b. **Troop Duration**: Troops typically meet throughout the year and **8-12 months** would be the best option to select

    c. **Program Frequency**: Select the best option that represent how often your Troop meets

    d. **Grade Level**: Select the option that represents the **majority** of the girls in your Troop.

    e. **Meeting Place**: Select the option that most closely represents where your Troop meets. Please keep in mind the differences between the **Public Facility** option versus the other distinct options. Some examples would be a Library being a "Public Facility" whereas the Boys & Girls Club would be "Other Organization Facility".

4. Under the **Meeting Day & Location** section, you are encouraged to fill out all fields:

Meeting Day & Location

Meeting Day	Friday
Start Time	-- Select - : -- Select - -- Select -
End Time	-- Select - : -- Select - -- Select -
Meeting Location	Jim Thorpe Elementary School
Meeting Address	1650 Patrick Ln, Henderson, NV 89014-0800

Save Changes

    a. **Meeting Day**: Select the day on which your Troop most often meets

    b. **Start Time** & **End Time**: The stated time that your meeting begins and end, in increments of 15 minutes. Make sure to specify if it is AM or PM.

    c. **Meeting Location**: It is recommended that you type out the **full name** of the meeting place if it is a public location. If the meeting takes place **within a home**, please type the Last name of the home owner followed by the word "Home". An example would be "Smith Home".

    d. **Meeting address:** Enter the **full and complete address** of the meeting place.

5. After making the appropriate changes, click **Save Changes**.

6. A message will appear stating that the changes have been saved.

Meeting Info saved successfully

Managing your Troop Members' Information

Another feature offered is the ability to **update the information** on a troop member. Information such as addresses, phone numbers, and email can change at any point throughout the membership year. While members and Leaders can submit the information to the council to be updated, the Leaders can also update this information from the Troop Management screen.

The method of updating information also gives the Leaders the option of printing out the Girl Scout **membership cards** for each member of their Troop.

To EDIT or ADD information to your member's record:

1. From the **Troop Management** page, select the member whose information will be updated by clicking on their name.

2. You will be directed to that member's **My Account** page, viewing their complete contact information as well as their parent/guardian information (for girl members) or their current positions (for adult members).

   At the top of the screen, you will see your own name and Troop number as well as a message stating which member account you are currently managing.

3. Update the information as necessary, as you would your own record.

4. To exit the member's record, click **Exit** at the top of the screen or click the **Troop Management** option from the menu.

To PRINT your member's Girl Scout membership cards:

1. From the **Troop Management** page, select a member by clicking on their name.

2. You will be directed to that member's **My Account** page, viewing their complete contact information as well as their parent/guardian information (for girl members) or their current positions (for adult members).

   At the top of the screen, you will see your own name and Troop number as well as a message stating which member account you are currently managing

3. In that member's **Membership Info** box, located under the main menu, click the **Print Membership Card** button.
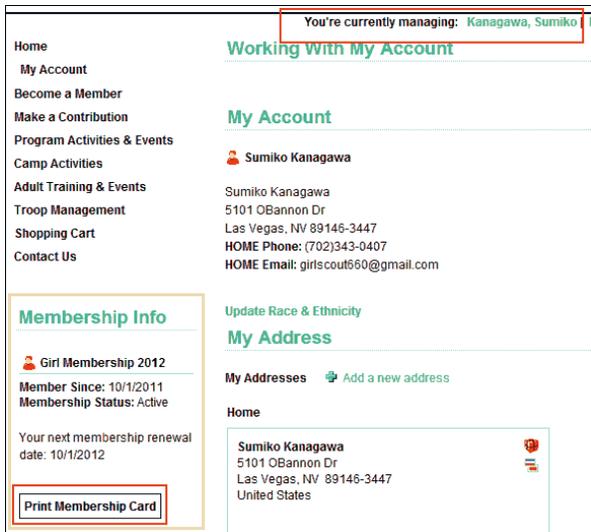
4. The GSUSA Membership Card window will pop showing the member's membership card, with their name and GSUSA ID#. Click the **Print Membership Card** button once more to have a physical copy of the membership card.

5. To exit the window, click **OK** or simply close the window.
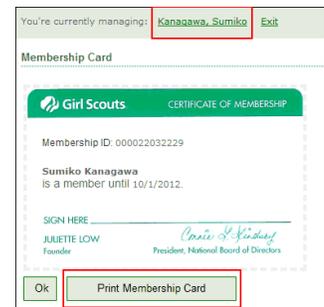
Emailing your Troop Members

This system has an email function within Troop Management. It allows Leaders to email any member of their troop that have a valid email within the system. It is critical that Troop Leaders help maintain their Troop member's records so that this type of communication method can be truly effective

An additional benefit to keeping records up-to-date is the communications sent from the council to the families showcasing upcoming council events and special activities as they become available.

1. On the **Troop Management** page, select the members you would like to email by checking the boxes next to their names.
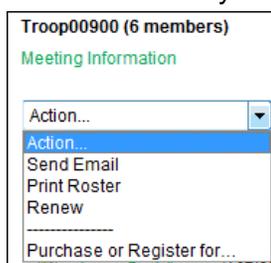
2. After making selections, open the **Action** drop-down menu and click the **Send Email** option.

3. The **Send Email** page opens, showing a plain-text box to make your email.

4. Fill in the text you wish to email, then press **Send Email**.

5. A message will appear stating that the emails have been sent.

Printing a Troop Roster

Troop Leaders now have the capability to print a current troop roster of girls and adults associated with their troop.

1. On the **Troop Management** page, select the members you would like to have show on the roster by checking the boxes next to their names.

2. After making selections, open the **Action** drop-down menu and click the **Print Roster** option.

3. The **Print Roster** page opens, showing the members that you selected from the previous screen.

4. Click the **Print Roster** button to open your computer's printing options.

GSUSA - PrintRoster

Troop00900

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Print Roster

Name	Address	Phone	Email
Jones, Danielle	7075 W Gowan Rd Las Vegas, NV 89129-7432	(702)932-1856	girlscout660@gmail.com
Kanagawa, Sumiko	5101 OBannon Dr Las Vegas, NV 89146-3447	(702)343-0407	girlscout660@gmail.com
Korgan, Karina	2530 Stewart Ave Las Vegas, NV 89101-4633	(702)385-3677	girlscout660@gmail.com
Korgan, Shelby	2530 Stewart Ave Las Vegas, NV 89101-4633	(702)385-3677	girlscout660@gmail.com
Smith, Jolene	2530 Stewart Ave Las Vegas, NV 89101-4633	(702)385-3677	girlscout660@gmail.com
Torres, Anita	5905 W Charleston Blvd Las Vegas, NV 89146-1194	(702)844-3692	girlscout660@gmail.com

Transferring Members

At this time, this system **does not** have the capability to transfer members between troops online. All membership transfers must all be completed by the council staff.

Remember that **currently registered members** need to be transferred into a Troop, rather than clicking the "Add Girl"/"Add Adult" buttons on the Troop Management page. "Adding" a member purchases yet *another* membership as well as creating a duplicate customer record.

To transfer members into or out of your Troop, you will need to contact your **Membership Specialist** at the council service center.

Purchasing New Girl Scout Memberships

While this system has the ability to allow Troop Leaders to purchase new or renew memberships for girls and adults from the Troop Management page, it is **G.S.R.I. policy that Troop Leaders will not register members through the Troop Management page**, and all new or renewing membership registrations will be purchased directly by the girl or adult online.

This policy is in place because:

- Anyone purchasing a new membership will also need to create and activate their individual online account. The username and password should remain **confidential** and accessible only to that individual/family.

- Any registration purchased through the Troop Management page **will not** be displayed on the individual's My Orders page.

Troop Leaders may still submit paper registration forms and payment to the council in order to add members to their Troop. For further information or assistance regarding purchasing memberships, contact the helpdesk at (401) 331-4500, opt. 9 or by clicking here.

Frequently Asked Questions

Q. *How can I see the girls in my troop?*

A. You must be designated as the Troop Leader (Position '01') to have access to the troop members' information. Once you have logged in click on the words **Troop Management** on the left side which will take you to the troop management page. If you are the leader for more than one Troop, you will see a drop down box that will display all your troop options. After you select the correct troop, you will have access to your troop meeting information, each current member in your troop to include girl and adult members.

For more details on each member's record, click on the member's name to access their contact and/or guardian information.

Q. *I'm trying to access Troop Management, but I'm getting a "Missing Segment Information" error.*

A. The error is related some backside settings of a member's position as "01 - Leader/Advisor." Please contact the helpdesk at (401) 331-4500, opt.9 or by clicking here and have the 01 position reset.

Q. *Some of my girls are missing from the Troop Management page.*

A. If paper forms were submitted to the council office for registrations, it is possible that they may be in the queue for processing.

Girls can only be registered with one troop at a time. If the "missing" girls were previously registered with another troop, you need to work with your Membership Specialist to have them transferred to your troop.

Q. *How can I add a girl to my troop?*

A. If a girl is currently registered in a different troop and needs to be **transferred** to your troop, contact your Membership Specialist for the required paperwork.

If the girl is **new** or her membership registration is expired, you will need to have the girl's parent/guardian register her and then request a transfer as stated above.

You may also turn in a completed registration form and payment for $12 to the Council Office for processing.

Q. *Membership cards list the wrong expiration date…*

A. The cards are reflecting the current year. They will show the correct expiration date when the new Girl Scout year begins.

Q. *I have made changes to member's information, but it isn't showing up…*

A. Some of information in the system takes 24 hours to update once it has been changed. If your changes still do not show after 24 hours, contact the helpdesk at (401) 331-4500, opt. 9 or by clicking here.

Q. *I no longer can see girls in my troop. What happened? I still need to re-register some girls.*

A. The troop list only shows **active** members. At the end of the membership year, all members who have not renewed their membership registrations for the upcoming year no longer display on the troop screen. You are strongly encouraged to complete online membership renewals before **September 30th** to prevent this from happening.

If this happens to any member of your troop, have the parent/ guardian go on line and renew the girls' membership, OR have the parent/guardian complete a paper copy of the registration form and submit it with payment to the service center.

Q. *I sent my members an email from Troop Management, but the email is being marked as spam.*

A. This is a known issue for some email carriers, such a Gmail, and it has been escalated to our national organization for review. However, a temporary workaround may be set up in each receiving member's email account to ensure that emails from the Leader from Troop Management will not filed in a junk or spam folder…

Email carriers should have methods of filtering or adding emails to a "**safe sender**" list. This is **not** the same as simply adding an email to a contact list. If members are receiving the email in their Gmail account, they will need to set up a **filter** with the option of **Never send it to Spam**.

Q. *Why does the print button on Order Summary page not work?*

A. This is mostly likely an issue with your computer and not a site issue. If the print button does not work, it is recommended that you press the Print Screen button on the keyboard or copy/paste the information into an application such Microsoft Word and print from that application.