

ScoutMap

Volunteer Onboarding Process



Handbook Guide

Here's what you'll find in this guide:

- Step-by-step guide to the Volunteer Onboarding process



Self-Register - General User



Self-Register



General User

Steps

1 Open Self Registration form link

For Parents/Guardians to Submit enquiry for Youth Member

<https://scoutmap.my.site.com/scouts/login/SelfRegister>

2 Provide the details

3 Click on Submit

Join the community to receive personalized information and customer support.

Registration Form

* First Name

* Last Name

* Email

you@example.com

* Phone No

* Date of Birth



Company Name

Submit

3

Self-Register



General User

Steps

- 4 Open your mailbox
- 5 You will receive an email to set the password
- 6 Click on the link and set the password.

Hi

Welcome to Scout CEPI! To get started, go to

Username:

Thanks,
Scouts WA

Enter a new password for

Make sure to include at least:

- 10 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character ⓘ

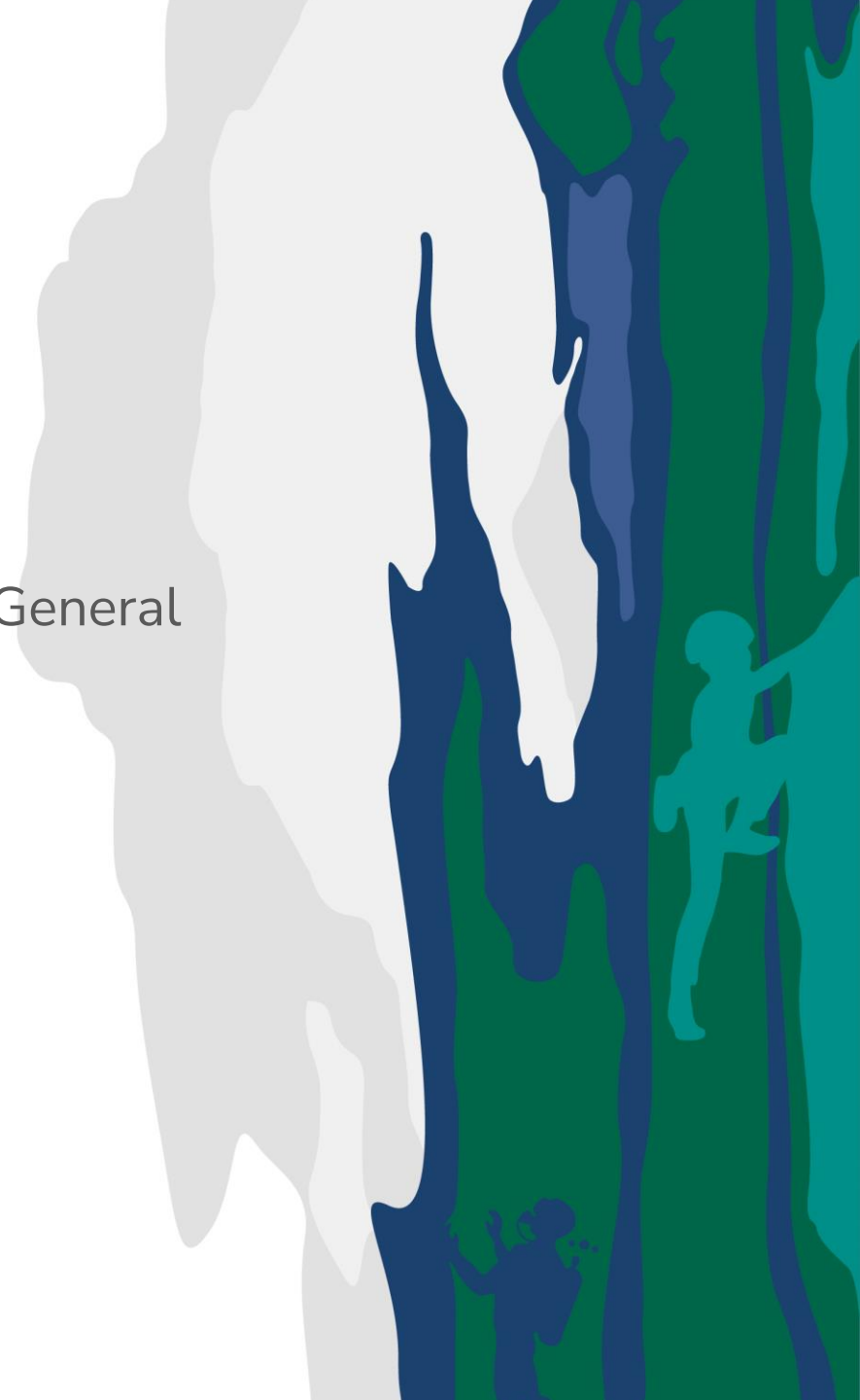
* New Password

* Confirm New Password

Change Password

Password was last changed on 11/3/2024, 10:55 am.

Submit Volunteer Expression Of Interest- General User



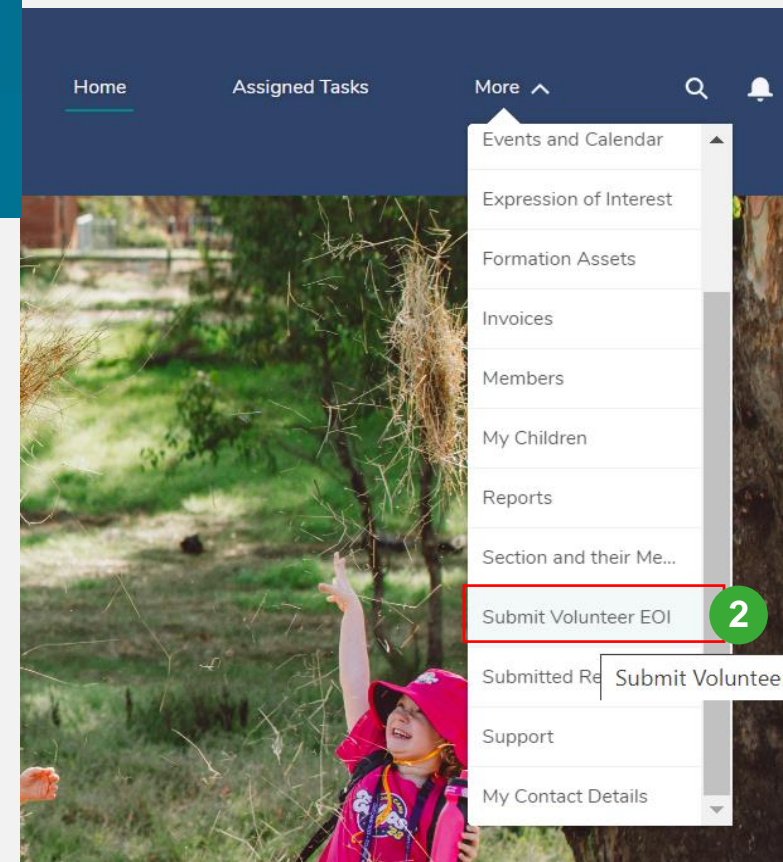
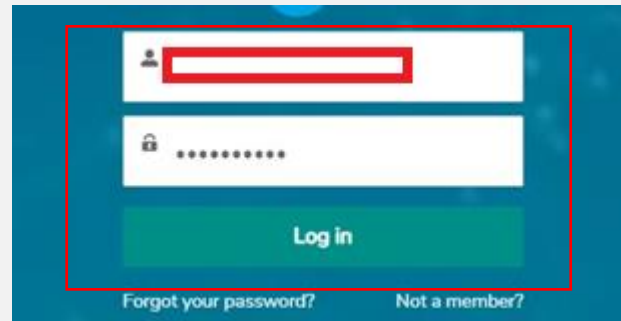
Submit Volunteer Expression of Interest



General User

Steps

- 1 Logon to the Portal using your Username and Password
- 2 Click on 'Submit Volunteer EOI' tab



Submit Volunteer Expression of Interest (EOI)



General User

Steps

3 Enter all the details

4 Submit Volunteer Expression of Interest (EOI) form

5 Now, Volunteer EOI form is submitted.

Logout from Portal

Scouts WA

Home Assigned Tasks More

Volunteer Application

Prospective Volunteer Details

First Name
First Name

Last Name
Last Name

Preferred Name

* Gender
--None--

* Date of Birth

Residential Address

Street

City State/Province
WA

Zip/Postal Code Country
Australia

Home Phone

* Mobile Phone

* Email Address
you@example.com

Emergency Contact

* Same as above
--None--

Have you previously been a member of Scouts?

* Which Scout Group are you interested in joining?
--None--

Medical Information

Do you consider yourself to have a disability, impairment or long-term condition?
 Yes
 No

Do you have any allergies?
 Yes
 No

Do you carry any medications with you?
 Yes
 No

Do you suffer from: (please tick all applicable and provide additional details)

Asthma
 Diabetes
 Epilepsy

Is there any further information you consider to be important?
 Yes
 No

Submit

Support and Feedback

Submit Volunteer Expression Of Interest (EOI)



General User

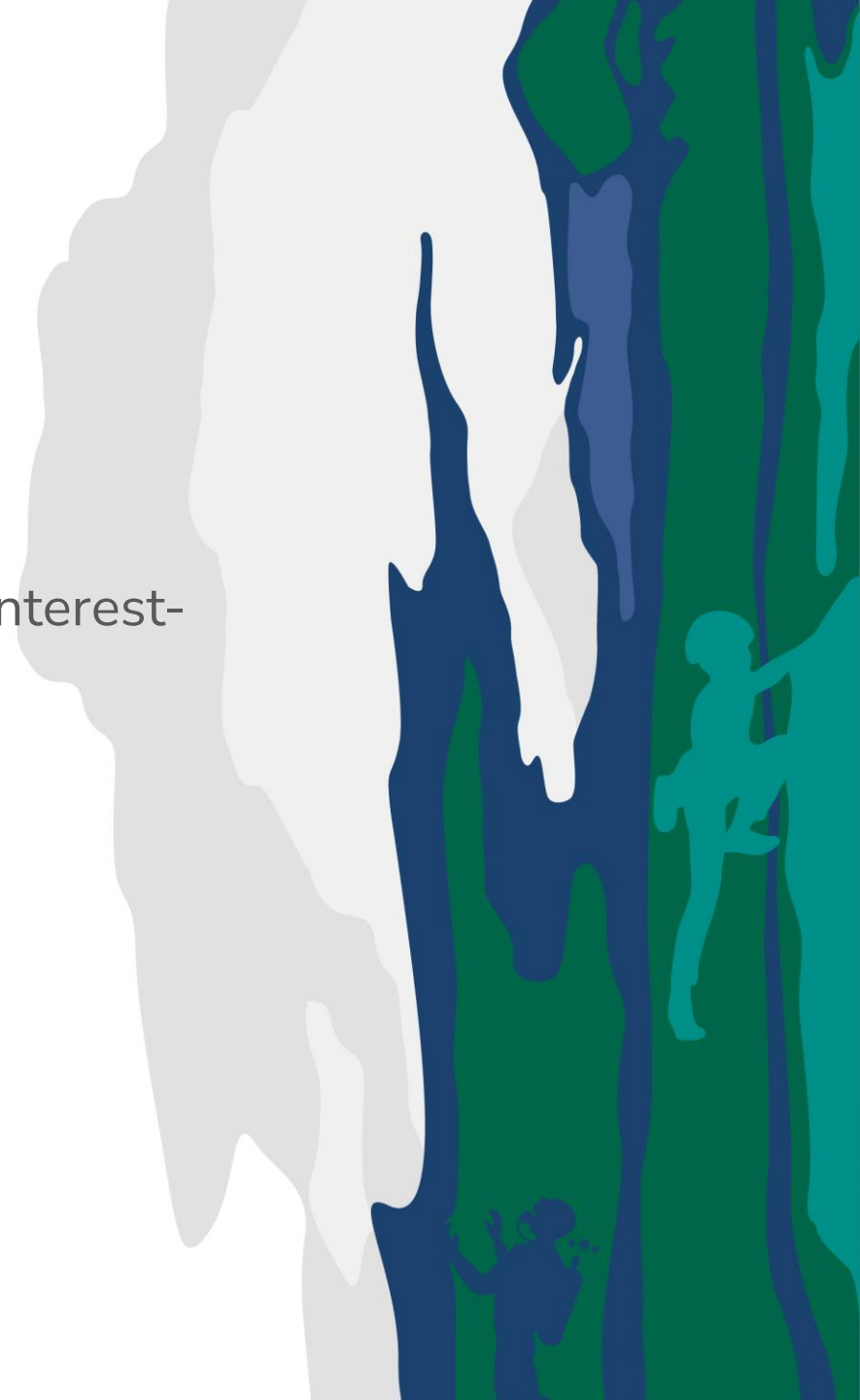
Steps

- 6 Log into ScoutMap
- 7 Navigate to Opportunities tab
- 8 Select 'Submitted for Review' list view
- 9 Click on the Opportunity Name to View EOI details

The screenshot shows the ScoutMap interface. At the top, there are two tabs: "Customer Engagem..." and "Opportunities", with the latter selected and highlighted with a green circle labeled '7'. Below the tabs, the "Opportunities" section is visible, with a dropdown menu set to "Submitted for Review", highlighted with a green circle labeled '8'. A search bar and several icons are present to the right. Below this, a table lists 28 items. The table has columns for Opportunity Name, Volunteer, Account Name, Created Date, Stage, and Postal Code. The first row is highlighted with a green circle labeled '9' and contains the following data: Opportunity Name: [Redacted] - Expression of Interest; Volunteer: [Redacted]; Account Name: SW Group; Created Date: 11/3/2024, 12:37 pm; Stage: EOI Submitted; Postal Code: 6061.

	Opportunity Name	Volunteer	Account Name	Created Date	Stage	Postal Code
1	[Redacted] - Expression of Interest	[Redacted]	SW Group	11/3/2024, 12:37 pm	EOI Submitted	6061

View submitted Volunteer Expression Of Interest-
Member Services



View submitted Volunteer Expression Of Interest



Membership Services User

Steps

On the Expression of Interest Details Page, EOI will be on EOI submitted status

1

Go to Prospective Volunteer Member Details

2

Click on the name in Volunteer Field

You will see the Volunteer(Contact) details page

The screenshot shows the 'Opportunity - Expression of Interest' page. At the top, there are buttons for '+ Follow', 'Edit', 'Clone', and 'New Note'. Below this, a summary row displays: Account Name: SW Group, Close Date: 10/4/2024, Amount, and Opportunity Owner: [redacted]. A progress bar below the summary shows stages: EOI Submitted (active), In Trial, Volunteer Application Submitted, PCC Initiated, and Closed. A 'Mark Stage as Complete' button is on the right. The main content area is split into 'Details' and 'Related' tabs. The 'Details' tab shows fields for Previous involvement in Scouting, Account Name (SW Group), Opportunity Name ([redacted] - Expression of Interest), Opportunity Owner ([redacted]), Expiry Date, and Stage (EOI Submitted). To the right is an 'Activity' section with communication icons and filters.

The screenshot shows the 'Prospective Volunteer Member Details' page. A red box highlights the 'Prospective Volunteer Member Details' header with a green circle '1' next to it. Below, the 'Volunteer' field contains a redacted name with a green circle '2' next to it. Other fields include Date Of Birth (11/3/[redacted]), Gender (Male), Mobile Phone ([redacted]), Email ([redacted]), and Home Phone.

View submitted Volunteer EOI



Membership Services User

Steps

On Volunteer(Contact) details page

3

Go to Related Tab

4

Go to Related Accounts section

5

Click on Add Relationship

You will see the Add Relationship screen

Contact [redacted]

Title	Phone (2)	Email	Contact Owner	Contact Type
		[redacted]	[redacted]	

Details **Related** 3

Related Accounts (1) 4

5 Add Relationship

[redacted] household

Direct:

Roles:

View All

View submitted Volunteer EOI



Membership Services User

Steps

On Add Relationship screen

In Account field enter the
6 Name of Formation for
Volunteer to attend trial

7 Select the role for the
volunteer

8 Click on Save

The Formation will be
added in the related
accounts section

The screenshot shows the 'New Account Contact Relationship' form. It includes the following elements:

- Account Contact Relationship Information:**
 - * Account:** A search field with a magnifying glass icon and a red box around it, labeled with a green circle containing the number 6. Below the field is the text 'Complete this field'.
 - Roles:** A list of roles with arrows pointing to a 'Chosen' box. The roles listed are Group Leader, Branch Adviser, Program Adviser, and Assistant Branch Commissio... This section is highlighted with a red box and labeled with a green circle containing the number 7.
 - * Contact:** A text input field with a red box around it.
 - Relationship Strength:** A dropdown menu currently showing '--None--'.
 - Active:** A checked checkbox.
 - Primary Formation:** An unchecked checkbox.
- Relationship Status:**
 - Start Date:** A date picker field.
 - End Date:** A date picker field.
- Buttons:** At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box and labeled with a green circle containing the number 8.

View submitted Volunteer EOI



Membership Services User

Steps

9 Go Back to the EOI(Opportunity)

10 Click on pencil icon besides stage

11 Update the stage to In Trial and Save

You can also update the stage by clicking mark stage as complete

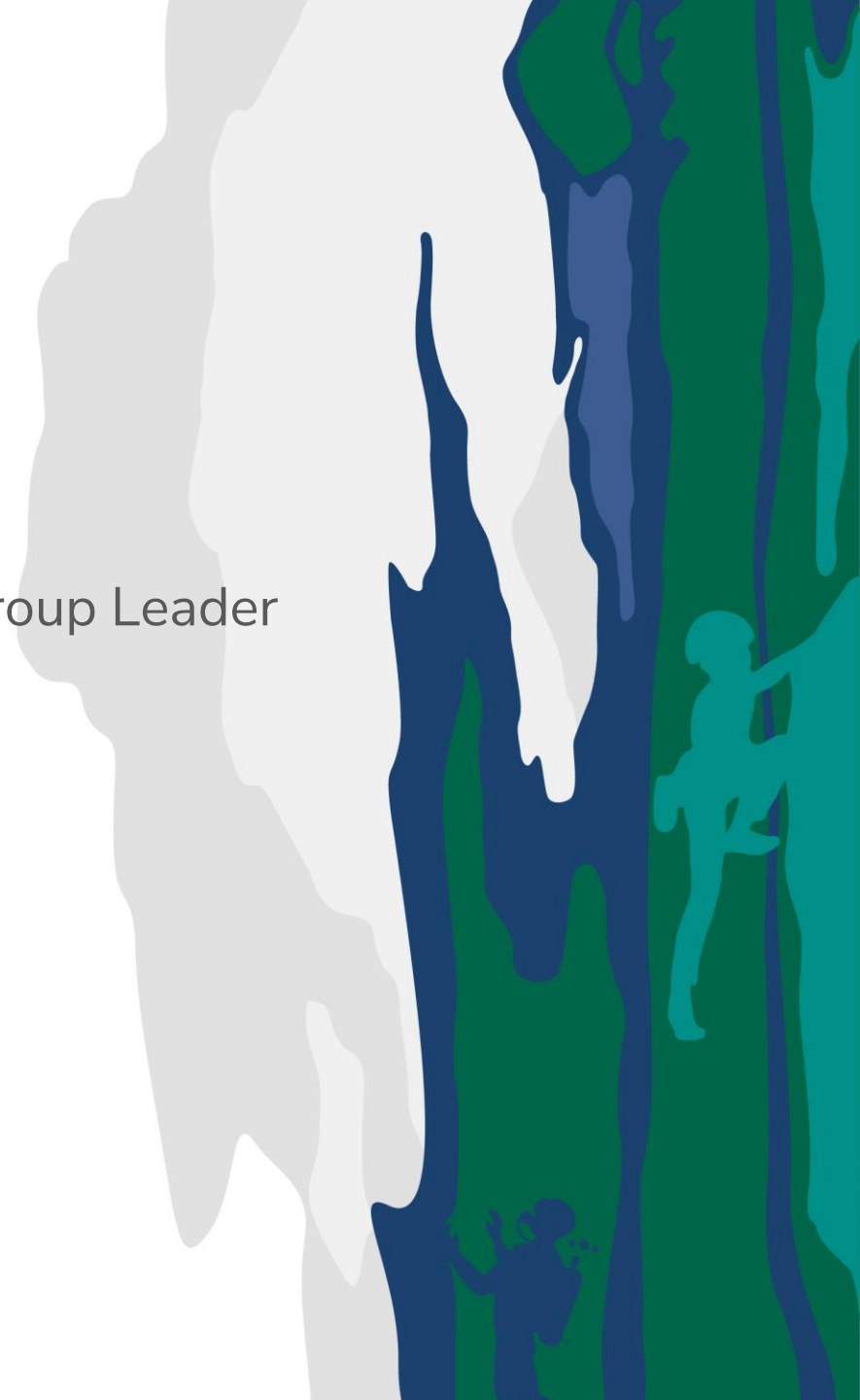
Stage will be moved to In trial

The screenshot displays the 'Details' view of a Volunteer EOI. The progress bar at the top indicates the current stage is 'In Trial'. The 'Details' section shows the following information:

Field	Value
Previous involvement in Scouting	<input type="checkbox"/>
Account Name	SW Group
Opportunity Name	Expression of Interest
Opportunity Owner	[Redacted]
Expiry Date	[Redacted]
Stage	EOI Submitted

At the bottom of the progress bar, there is a 'Mark Stage as Complete' button.

View new member added to the group- Group Leader



View new member added to the group



Group Leader

Steps

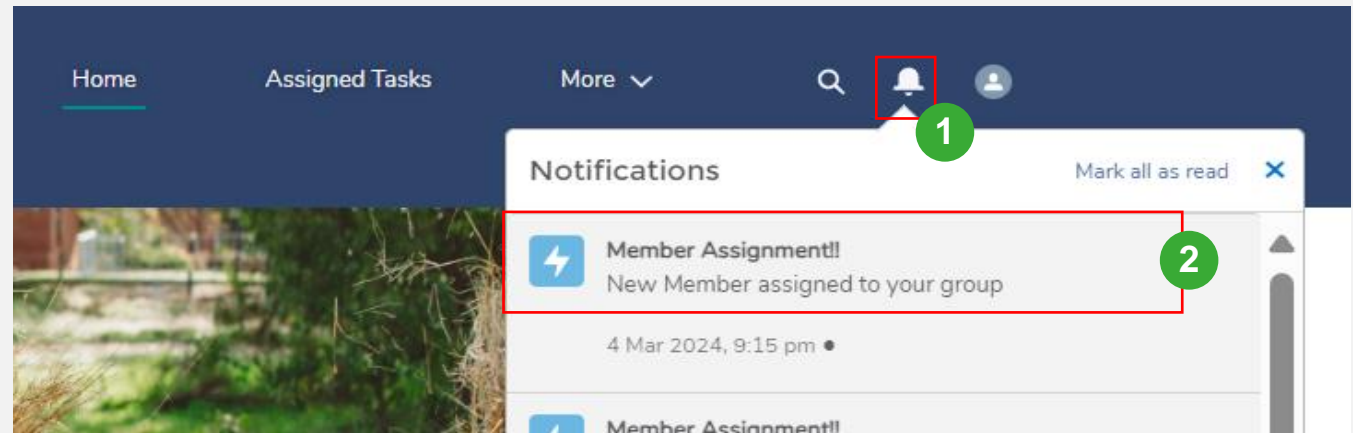
Group Leader will receive a notification when a member is added to the group

1 Click on Bell Notifications icon

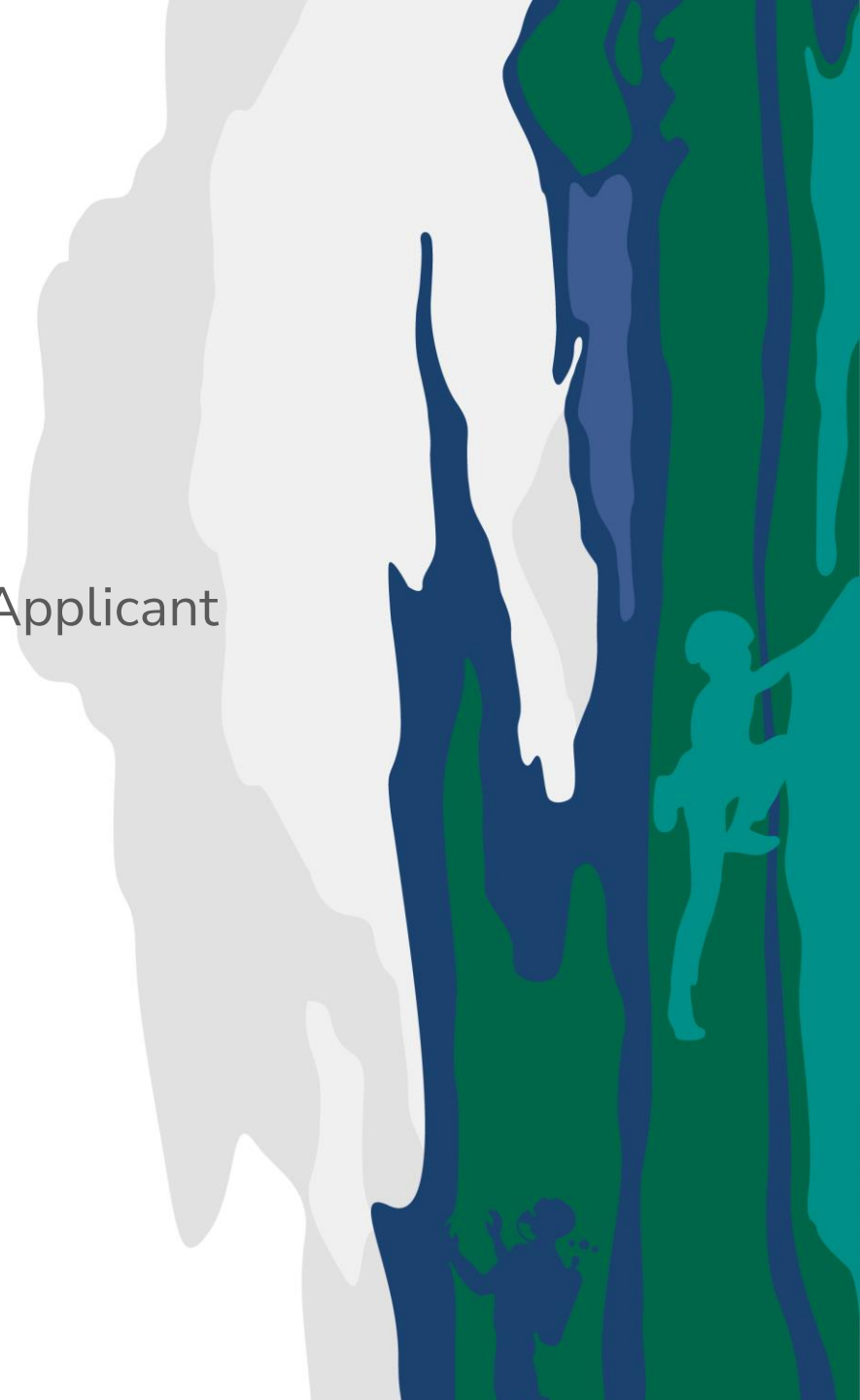
You will receive a notification that New Volunteer is assigned to Formation.

2 Click on the notification

You will be redirected to Contact page.



Submit Volunteer Application- Volunteer Applicant
(General User)



Submit Volunteer Application

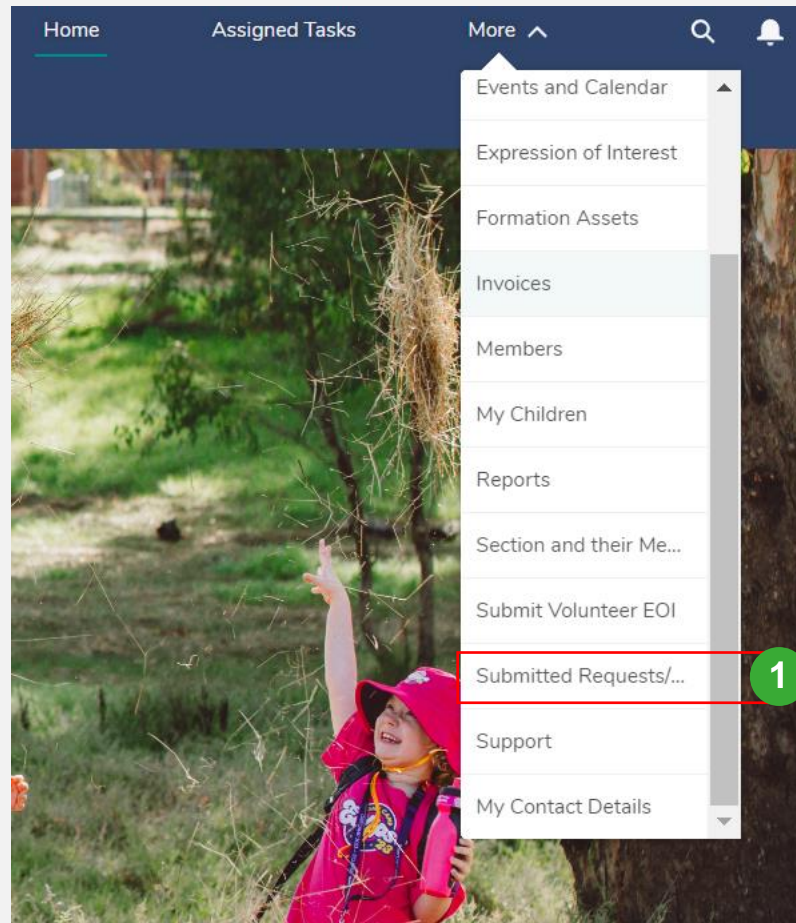


Volunteer Applicant

Steps

Login to ScoutMap

1 Click on Submitted Requests/Applications



Submit Volunteer Application



Volunteer Applicant

Steps

2 Click on 'Submitted Volunteer Applications' tab

3 Click on Application (Opportunity Name) to view details

On the Application (Opportunity) details

4 Click on 'Click to Submit Application' link

The screenshot shows the 'Submitted Volunteer Applications' interface. At the top, there are three tabs: 'Submitted Applications', 'Submitted Member Application', and 'Submitted Volunteer Application'. The third tab is selected and highlighted with a red box and a green circle containing the number '2'. Below the tabs, the page title is 'Submitted Volunteer Applications'. A search bar and filter options are visible. A table lists one application with the following details:

Opportunity Name ↑	Stage	Created Date
[Redacted] - Expression of Interest	In Trial	11/3/2024, 12:37 pm

Below the table, there are two sections: 'DETAILS' and 'RELATED'. The 'DETAILS' section shows the following information:

- Account Name: SW Group
- Close Date: 10/4/2024
- Amount: [Redacted]
- Opportunity Owner: [Redacted]
- Opportunity Name: [Redacted] - Expression of Interest
- Household: [Redacted] Household
- Pending Pre-requisites:
- PCC Expiry Date: [Redacted]
- PCC Initiated On: [Redacted]
- Opportunity Owner: [Redacted]
- Expiry Date: 8/4/2024
- Stage: In Trial
- Closed Reason: [Redacted]
- Close Comments: [Redacted]

At the bottom of the 'DETAILS' section, there are two links: 'Submit Application' and 'Click to Submit Application'. The second link is highlighted with a red box and a green circle containing the number '4'.

Submit Volunteer Application



Volunteer Applicant

Steps

You will see an application form

5 Enter the details

6 Click on Submit

Volunteer Application will be submitted

Support and Feedback

Submit

Update Trial feedback on Volunteer Application-
Group Leader



Update trial feedback on Volunteer Application

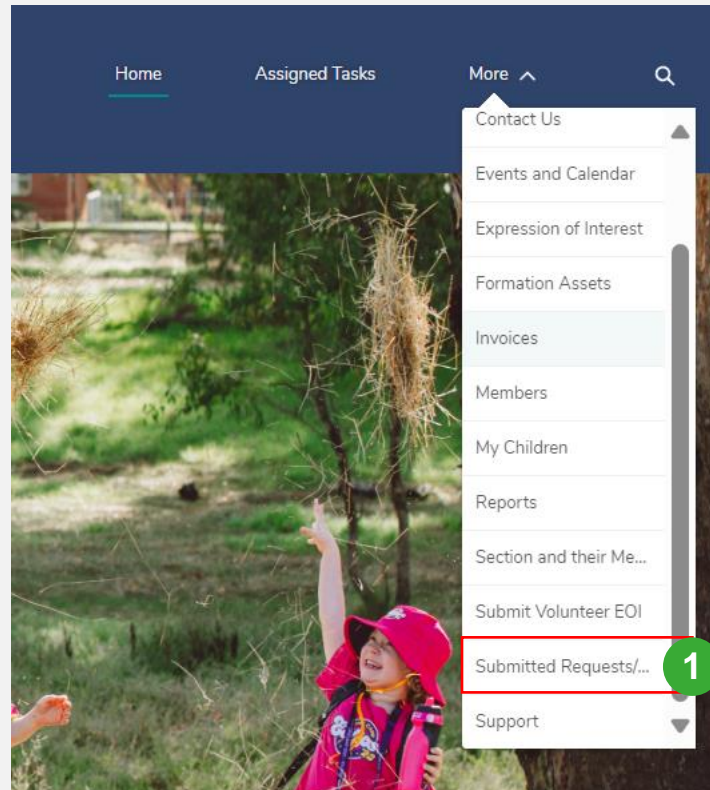


Group Leader

Steps

Log in to ScoutMap

1 Click on Submitted Request/Applications



Update Trial feedback on Volunteer Application



Group Leader

Steps

2 Click on Submitted Volunteer Applications tab

3 Click on Application (Opportunity Name) to view details

4 Click on share an update

The screenshot shows the 'Submitted Volunteer Applications' tab selected. A table lists one application: 'Expression of Interest' in the 'In Trial' stage, created on 11/3/2024. The application name is highlighted with a red box and a green '3'. Below the table, the details for the 'Expression of Interest' application are shown. The 'Opportunity Name' is highlighted with a red box and a green '3'. The 'Opportunity Owner' is also highlighted with a red box. A 'Share an update...' button is visible. A feedback update is shown in a red box with a green '4', stating 'User16992696129536408016 (Employee) updated this record. 54m ago'. The update text is 'EOI Submitted to In Trial'.

Update Trial feedback on Volunteer Application



Group Leader

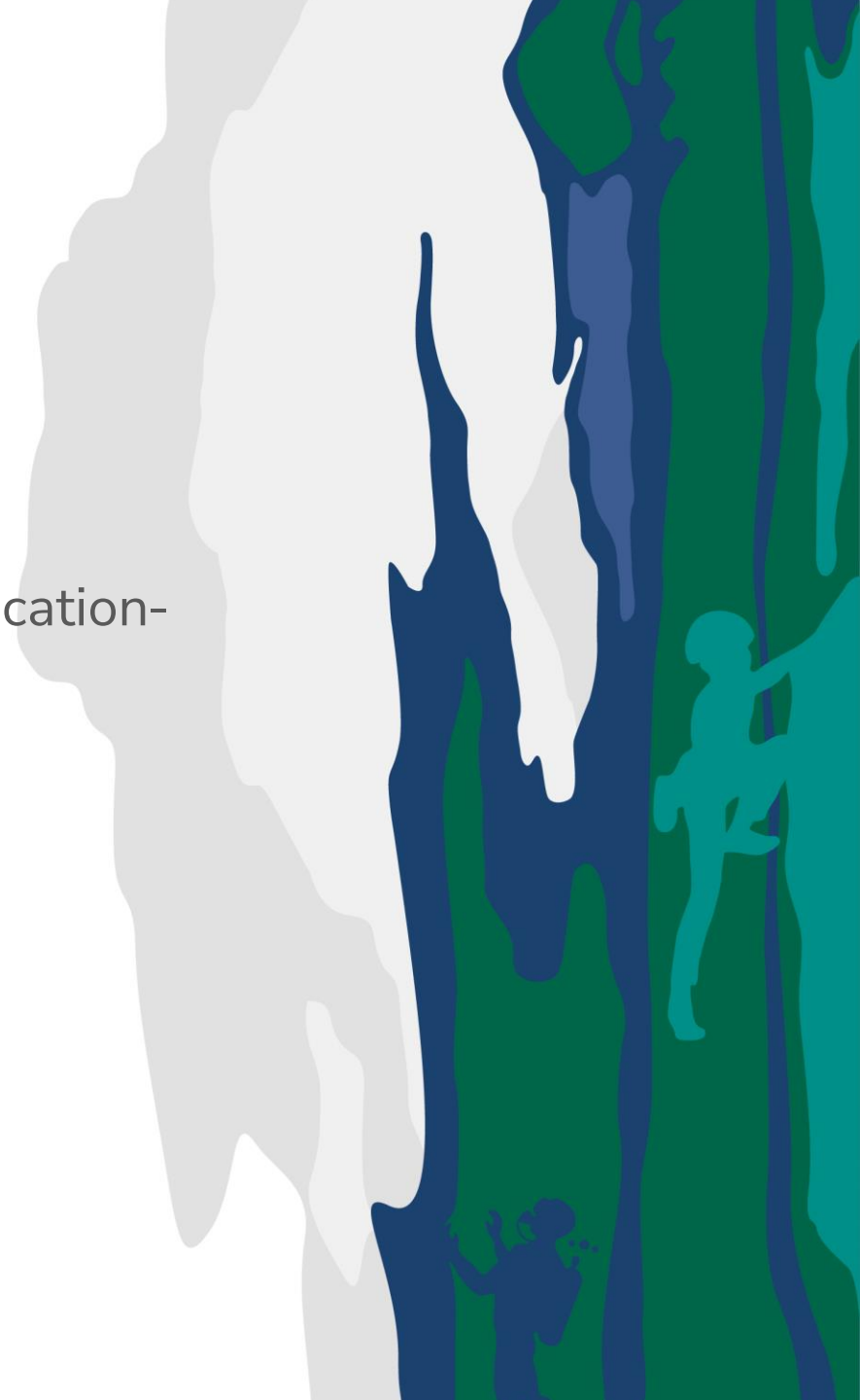
Steps

5 Type your feedback for Volunteer Applicant

6 Click on Share

A screenshot of a web interface for providing feedback. At the top, there is a "Post" label and a text input field. Below this is a larger text area containing the text "Good behavior in trials with expected results". A red box highlights this text area, with a green circle containing the number "5" to its right. Below the text area is a rich text editor toolbar with icons for bold, italic, underline, link, unlink, list, and other formatting options. Below the toolbar is a "To this opportunity" label and a link icon. A green "Share" button is highlighted with a red box and a green circle containing the number "6". Below the share button is a search bar labeled "Search this feed...", a filter icon, and a refresh icon. At the bottom, there is a user profile section with a profile picture, a name field (partially obscured by a red box), and the text "(Partner)" and "1m ago". The text "Good behavior in trials with expected results" is repeated below the profile section.

View & Update submitted Volunteer Application-
Member Services



View & Update submitted Volunteer Application



Membership Services User

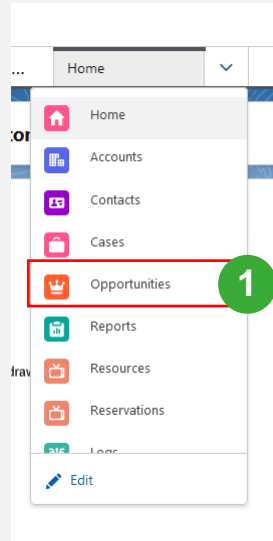
Steps

Membership Services User logs on to salesforce

1 Navigate to Opportunities tab

2 Select 'Submitted for Review' list view

3 Click on Application (Opportunity Name) with Volunteer Application Submitted status to view submitted Volunteer applications



	Opportunity Name	Volunteer	Account Name	Created Date	Stage	Postal Code
1	<input type="checkbox"/> Expression of Interest	<input type="checkbox"/>	SW Group	11/3/2024, 12:37 pm	Volunteer Application Submitted	6061

View & Update submitted Volunteer Application



Membership Services User

Steps

4 Click on pencil icon to update Stage field to 'PCC Initiated' (if pre-requisites are complete)

5 Click on Save

Application is moved to PCC Initiated stage and 'PCC Initiated on' field will be auto-populated with present' date.

NOTE: Provide conditions in 'Conditions' field if its Conditional Approval.

A screenshot of a web application interface showing the 'Details' tab of a volunteer application. The page is divided into two columns: 'Previous involvement in Scouting' and 'Opportunity Owner'. The 'Previous involvement in Scouting' section includes a checkbox, 'Account Name' (SW Group), 'Opportunity Name' (Expression of Interest), and 'Household'. The 'Opportunity Owner' section includes 'Expiry Date' (8/4/2024), 'Stage' (Volunteer Application Submitted), and 'Closed Reason'. A red box highlights the 'Opportunity Name' field, and a green circle with the number '4' is next to the 'Stage' field. At the bottom, a 'Save' button is highlighted with a red box and a green circle with the number '5'. The 'PCC Initiated On' field is also visible at the bottom left.

View & Update submitted Volunteer Application



Membership Service User

Steps

When PCC is received

If PCC is Passed

Go Back to on the Application Name (Opportunity)

6 Enable 'PCC Pass' checkbox

7 Update 'PCC Expiry' date

8 Update Stage filed to 'Onboarding complete'

9 Click on Save

Member Number	1,000,027	PCC Pass	<input type="checkbox"/>
PCC Expiry Date		Conditions	

Sh

- None--
- EOI Submitted
- In Trial
- Volunteer Application Submitted
- PCC Initiated
- Onboarding complete
- Did not proceed

Onboarding complete

[View all dependencies](#)

Closed Reason

PCC Initiated On	Date	Title	Cancel	Save
------------------	------	-------	--------	------

View & Update submitted Volunteer Application



Membership Service User

Steps

When PCC is received

If PCC is Failed

Go to Application Name
(Opportunity)

10 Update the stage field to
did not proceed

11 Update the closed reason

12 Click on save

* Stage
Did not proceed

View all dependencies

Closed Reason
--None--

✓ --None--

Pre Screening Failed

Application Not submitted

PCC Failed

PCC Pass

PCC Inherited On: [Date] Title: [Text]

Cancel Save

View & Update submitted Volunteer Application



Membership Services User

Steps

13 Click on Volunteer Applicant Name

On Applicant details(Contact)

14 Click on the Drop Down

15 Click on 'Disable Partner User' button

Now, Portal access to volunteer is deactivated

The screenshot displays the 'Prospective Volunteer Member Details' page. Step 13 highlights the 'Volunteer' field. Step 14 highlights the 'Log in to Experience as User' dropdown menu. Step 15 highlights the 'Disable Partner User' option in the dropdown menu.

Prospective Volunteer Member Details

Volunteer	[Redacted]	Mobile Phone	[Redacted]
Date Of Birth	[Redacted]	Email	[Redacted]
Gender	Male	Home Phone	
[Redacted]	- Expression of Interest	Volunteer Application Submitted	
Household	[Redacted] Household	Closed Reason	

Contact: **ShreyasQ PatilQ**

Buttons: + Follow, Clone, View Partner User, Log in to Experience as User

Details: Title, Phone (2), Email (pshreyas20@gmail.com), Contact Owner (Chandraprabha P), Contact Type (Adult)

Activity Chatter: + Follow, Clone, View Partner User, Log in to Experience as User

Dropdown Menu: Delete, Edit, View Contact Hierarchy, Change Owner, Check for New Data, **Disable Partner User**, Sharing Hierarchy, Sharing, New Contact

Filters: All time • All ad

Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.

View & Update submitted Volunteer Application



Membership Services User

Steps

16 Click on pencil icon and Uncheck 'IsActive' checkbox

Click on Save

17 Now, you will be able to deactivate Volunteer applicant record

Details Related

Membership Information

Member Number	1,000,027	Account Name	<input type="text"/> Household	<input type="text"/>
Name	<input type="text"/>	Formation Leader		<input type="text"/>
Preferred Name		Post Nominal		<input type="text"/>
Youth Gender	Male	Is Primary Contact	<input type="checkbox"/>	<input type="text"/>
Age (In Years)	<input type="text"/>	Birthdate	<input type="text"/>	<input type="text"/>
Age (In Months)	444	IsActive	<input checked="" type="checkbox"/>	<input type="text"/>
Contact Type	Adult	Status	In Trial	<input type="text"/>

PCC Initiated On: [Date] Title: [Text] [17] [Date] Title: [Text]