UNIT ROSTER

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Introduction

This guide will walk you through the concepts, configuration, and use of the Unit Roster feature on your SOAR website.

The Unit Roster feature is available in the Standard and Advanced Packages. It is the core feature of your website and interacts with almost every other feature in your SOAR website – Announcements, Calendar Events, Event Registration, Email Lists, EBlast, Online Payments, and Calendar Sync.

Your Unit Roster will contain all the information about your current and past unit members, their family relationships, scout and adult leadership positions, group membership, and website permissions.

Overview

The Unit Roster on your SOAR website can:

- Record contact information for members
- Record other personal information
- Record custom fields of your choosing
- Allow members to update their own infomation
- Create Families of Scouts and Adults
- Assign Scouts/Adults with Dens, Patrols, and Groups
- Assign leadership positions to Scouts and Adults
- Assign viewing permissions for different groups
- Assign website permissions for individuals
- Import members from Excel/CSV and PackMaster/TroopMaster
- Export members to an Excel file
- Provide you with reports on your unit members and their contact and personal information
- Feed the creation of automated email lists for communication purposes
- Create the categories (Dens, Patrols, and Groups) by which other content (Announcements/Events) is tagged and the EBlast and Website personalizes content for members.

Quick Start

If you want to jump right in and see the feature live, follow these steps to get acquainted with the Unit Roster feature on your SOAR website.

1. Pick a membership mode at Admin/Control Panel/Membership. We recommend Simple Membership to get you started
2. Turn ON the Den/Patrol Filter and Roster Features at Admin/Members/Roster Settings. Turn on Extra Details, Medical Forms, and Notes to get started.
3. Create a Den/Patrol at Admin/Members/Add.
4. Create a Group at Admin/Members/Add.
5. Create a new family at Admin/Members/Add /Family to see what information is available.
6. Add the family members to Dens/Patrols and Groups at Admin/Members/Group Members.
7. Assign the family members some leadership positions at Admin/Members/Leaders.
8. Take a look at the Roster reports at Menu/Pack or Troop Roster.

9. Use Admin/Members/Manage feature to view the members you added to the Roster.
10. Look at the different options in the Filter section at the top to see what information you can view.
11. Delete the members using drop down box and Submit Changes at the bottom of the page.
12. Decide how you will be getting your Roster into your SOAR website moving forward.
    a. Manually creating members.
    b. Using the Member Import function.
    c. TroopMaster/PackMaster Import.
    d. "self registration" – *NOT recommended*.

Vocabulary

Moving forward, it will be helpful to define a set of terms used in the Unit Roster feature so there is a common understanding of their meaning as you see them in this document and on your SOAR website.

Unit   Any type of scouting group that has scouts as members. Pack, Troop, Crew, etc.

Scout   A youth member of the unit.

Adult   An adult member of the unit. This could be and adult that is a leader and does not have any Scouts in the unit or a parent of a Scout that is not a leader.

Family   A grouping of Scouts and Adults.

Parent   An Adult that is associated with a Scout through a Family.

Other   This term is no longer used and has been removed. All those tagged as 'Other' are now simply 'Adults'.

Active   Any scout or adult that is currently a member of the unit and active. Will this scout or adult leader be listed on the Recharter? Is this a parent of one of these scouts?

Inactive Any scout or adult that was a previous member of the unit but is no longer participating actively.

Pending A Scout or Adult that has self-registered for an account on your unit website. Their account, and website access, will not be active until an Administrator approves them.

Login   The ability for a member to use an Individual Account to login to your unit website. This is a True or False indicator. This replaces the old "Active vs. Blocked" terminology in the old Unit Roster feature which was confusing.

Den/ Patrol An official organization sub structure of the Troop or Pack. A Scout belongs to one (and only one) Den/ Patrol. Parents automatically belong to Dens/Patrols through any Scouts in their Family.

Group   A method to group unit members and/or categorize content (Announcements/Events) with a common topic. e.g. Finance Committee, Pinewood Committee, Patrol Leaders Council (PLC), Quartermasters, ASMs.

Group Member A Scout or an Adult that belongs to or is a leader for a Den, Patrol, or Group.

Group Leader A Scout or an Adult that is responsible for the leadership of a Den, Patrol, or Group.

Position A leadership position that a Scout or Adult holds in the unit.

Website Access

Understanding how your members will login to your SOAR website may be tied to the Unit Roster depending upon which setting you choose. Thus it is important to understand your options and how it will interact with the Unit Roster feature.

Your SOAR website comes with two methods for providing website access to your members. You will need to pick which Membership mode you will be using. You cannot use a combination of both. Independent of which membership mode you choose, all features of your SOAR website will be available to members.

The majority of the SOAR Pack customers use Simple Membership, the majority of SOAR Troop customers use Individual Accounts.

Simple Membership

Four "Shared Accounts" on your SOAR website will be active for you to pass out to your members. The usernames are:

member   This account is for all unit members. It allows them to login and view information on your unit website not available to the public. Through this account, members can access the Comments, Event Registration, Online Payments, Calendar Sync, and Email features if you have activated them.

leader   This account is for members that will be posting content to your unit website – Welcome Message, Announcements, Events, Files, Links, Photo Albums, and Custom Pages. This account cannot modify the Unit Roster, Email Lists/Settings, or Site Settings.

roster   This account is for members that will be managing the Unit Roster. It will allow them to add/modify/delete members, groups, group assignments, leadership positions, and Roster settings. This account cannot modify Email Lists/Settings directly or Site Settings

admin   This account is for the few members that will be managing your unit website and has access to change anything on your SOAR website.

Unit members will use one of these usernames to login to your unit website. You can decide who will get which username/password and therefore what level of access they have. Because the accounts are "shared" by multiple people, only an administrator can change the account passwords.

You should change the passwords on your Shared Accounts each year, typically as the scouting season starts in the fall. This is important to make sure members that have dropped or crossed over to Boy Scouts no longer have access.

Pros   Simple – no individual accounts for each member to deal with.
Easy for members to figure out how to login by talking to anyone in the unit – they all will login the same way

Cons   Members cannot update their own contact and personal information.
They also cannot edit their own Event Registrations once they are made.
Someone with the 'roster' or 'admin' account will need to do this.
If you need to remove access for someone, you need to change the passwords for everyone

You choose Simple Membership and change the Shared Account usernames/passwords at Admin/Control Panel/Membership on your SOAR website.

In this mode, members will not have access to login to your SOAR website through any personal accounts that have been created in the past.

When adding/editing Roster entries for members you will not be required to provide usernames or passwords as they will not be used by members.

Individual Accounts

Each member of your unit will receive their own username and password. The Shared Accounts, except 'admin', will be blocked. The 'admin' account is always active for use by your website administrators.

If you are Importing your Roster from an Excel/CSV file or PackMaster/TroopMaster there are options to automatically create usernames, passwords, and send an email notification to members with this information.

If you are manually adding Roster entries, you can set usernames and passwords while entering other member information.

The Unit Roster tools at Admin/Members can be used to manage both Roster and Account information for all members, independent of how they were created.

Each individual account created has the same basic permissions as the 'member' Shared Account. You can then give individual accounts additional permissions:

Account Permission	Shared Account Equivalent
All individual accounts	'member'
'Add Content'	'leader'
'Manage Roster'	'roster'
'Administration'	'admin'

Unlike the Shared Accounts where each account only has one permission level, with Individual Accounts you can assign multiple permissions to the same account.

You can also control who can Login to your unit website and who cannot through Individual Accounts.

To assist with "self service" those with individual accounts can retrieve their own password using the "Forgot Password" link in the Login box.

Pros   Members can update their own contact and personal information.

Members are pre-selected when registering for Events.

Members can edit and change their own Event Registrations.

Members can retrieve their own password if they forget it.

If you are using the Member or TroopMaster/ PackMaster Imports, username, passwords, and account notification can be done automatically.

Cons   More time to get all the login accounts setup, distributed, and maintained.

Even though members can retrieve their own passwords, often the website administrator will get contacted to help.

Active vs. Inactive Members

An Active member is one that is currently participating in your unit. It has no relation to a member's ability to login to your unit website.

As you add new members to your Unit Roster you are almost always going to want to make them Active – that way they will display in your Unit Roster and be included in Dens, Patrols, Groups, Email Lists, and the SOAR EBlast. Active is the default when you manually add members to the Roster or use the Import functions.

When a Scout/Family drops from scouting, ages out of Boy Scouts, or crosses over from Cub Scouts to Boy Scouts you have two options:

1. Make them Inactive and keep their information in the "history" section of your Roster
2. Delete them and completely remove them from your Unit Roster and "history" section.

Making a member Inactive will keep all of their contact and personal information. It does remove the following:

- Any family associations
- Any Den, Patrol, or Group associations
- Any leadership positions
- Any Email List associations
- Any Add Content, Manage Roster, or Administration permissions they had
- Prevents them from logging into your unit website

The new Unit Roster has two separate "flags" you can assign to members to define their status.

Active   OR   Inactive
Login   OR   No Login

If you are using Simple Membership, all members will have No Login access. For those using Individual Accounts – Inactive members will always have No Login access and Active members may or may not have Login access.

Roster Settings

After you have picked the membership mode that suits your unit, you will want to decide what information you want to collect about your members.   Admin/ Members/Roster Settings controls what Unit Roster features and information you want to use/collect. You can choose what information is important for your specific unit to keep track of.

Den/Patrol Filter

This feature will allow you to associated Dens, Patrols, and Groups with Announcements and Events. The picture on the right shows the group selection box for an Announcement. One or more Dens, Patrols, or Groups can be selected.

Note: if an Announcement is meant for the entire Pack or Troop, select just that Filter. There is no need to pick each and every Den, Patrol, and Group to make sure everyone gets it. Doing that just clutters your website

and confuses most members. Selecting the single "Pack" or "Den" filter will accomplish the same thing.

When members login, they will see the Den/Patrol Filter box in the lower right of the Home Page. This will allow them to select which groups they are interested in seeing content for. Their selection is stored in a "cookie" so their selection will be remembered the next time they login. Your unit website will then personalize all pages to their selection. This is extremely useful for larger units with a lot going on – it will allow parents to focus on what is important to their scouts.

The "Pack" or "Troop" filter is the default and will be shown to all members. It also cannot be deselected. This is to prevent members for accidentally hiding Pack/Troop content.

The "Committee" filter is also special. All adults with a leadership position automatically belong to this group.

For Packs, ideally you will have each of your Den Leaders posting Announcements and Events for their Den and tagging that content with their Den.   Other leaders can then post content for the Pack, Committee, and any other Groups you create.

Troops can use the same concept for any Patrol specific activities or create groups for larger trips to keep members informed.

The EBlast feature will create a personalized email to each member based on the Dens, Patrols, or Groups. Parents will automatically get Den, Patrol, and Group associations from the Scouts in their Family.

Roster Feature

Access to the Pack/Troop Roster under the main Menu and all the administrative functions of the Roster.

Edit Own

This option only applies to customers using the Individual Accounts setting for membership mode.

This will allow members to login with their own personal account and update information on themselves and their family via User/My Profile.

If this option is turned off, members will be able to change their own password via User/Change Password, but not any other contact or personal information.
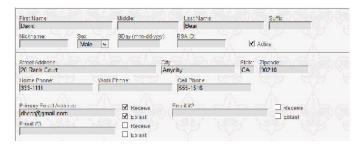
PackMaster/TroopMaster users – This feature should be turned OFF ! If you leave this feature on, any information members will be overwritten by the next PackMaster/TroopMaster Import.

Use Nickname

This option will display a member's Nickname (if available) instead of their First Name.

Roster Base Fields

Standard information for all members.

- First Name, Nickname, Middle, Last Name, Suffix
- Birthday, Sex, BSA ID number, Active or Inactive
- Street, City, State, Zip Code
- Home, Work, Cell Phones
- 3 Email addresses & preferences

Remember – Active refers to status with the unit, NOT if the member can login with this account.

The Receive option for an email address gives members the choice to have email from Email Lists delivered to that address. If they do not receive email for an email address, that email address can still get permission to send email.

The EBlast option for an email determines if a member will receive the weekly EBlast at that email address.

These email options give members and administrators the ability to set their very specific preferences on how email communications will be received.

If you are using Individual Accounts, you will also see the following information.

- Username, Password, Login Access
- Account Permissions

Extra Details

If turned on, you will also be able to collect:

- Driver's License Number, State
- Social Security Number, Occupation, Employer

Medical Forms

If turned on, you can keep track of the dates for the various parts of the BSA Medical Form.

Medical Information

This section includes fields for capturing specific information from the Medical Forms.

- Emergency Contacts, Insurance Information
- Doctor, Medications, and Allergies

Custom Fields

You can define up to 4 additional fields of information you want to collect about your members.

Notes

A free form section to keep any additional notes you want to keep about members.

Note: Even if the Edit Own option is turned on, members cannot modify the Notes field.
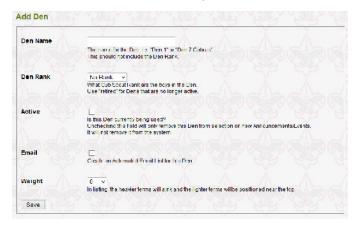

Dens & Patrols

Once you have selected what information you want to collect about your members, it is time to get the base for your Unit Roster ready –Dens and Patrols.

This is done through the Add/Den, Add/Patrol, Add/Group and Manage/Groups buttons at Admin/Manage on your SOAR website.

Add in the Dens and Patrols for your unit first.

Den/Patrol Name

For Packs, the Den Name field should NOT contain the Rank of the Den. The Rank of the Den is captured separately from the Den Name. The Den Name is the fixed label for this Den as the scouts go from Lion, Tiger

and through Webelos. It should be something like "Den 9". The Email List name for the Den will also feed off the Den Name. You do not want the Email List name for the Den to change every year by putting the Rank in it.

For Troops, the Patrol Name can be anything you want. Do not make it too long, otherwise the resulting Email List address will not be easy to remember.

Den Rank

This is only for Packs. For active Dens you should select the current Rank of the Scouts in the Den.

After the Den has crossed over to Boy Scouts you should keep the Den around. Do not delete it. Change the Den Name to something like "Den X - <year> - <leader last name>". This is important because your SOAR website is creating an archive of Announcements, Events, and attachments over time. You still want all that information to be associated with the Den that is belonged to at the time. If you delete the Den, then all that content will then become associated with the Pack.

Active

Is the Den or Patrol currently in use and does it have Scouts associated with it. If it is no longer in use, do not check the Active checkbox.

Email

Do you want an Email List created and automatically kept up to date with Den/Patrol members? If you are using the Auto Email List feature, you should always select this checkbox.

Weight

When displayed the Dens, Patrols, and Groups will automatically sort by name. If you want to display them in another fashion, you can use the Weight option to achieve that.

A lower number (i.e. negative) will display first. A higher number (i.e. positive) will display last. Dens, Patrols, and Groups with the same Weight will alphabetically sort amongst themselves.

Groups

Next you will want to create some of the common "categories" you want to associate content with or other groups you want members to belong to.

For Troops you could create groups for Order of the Arrow, Greenbar or PLC, ASMs, etc.

For Packs you could create groups for Den Chiefs, Den Leaders, Fundraising Committee, etc.

You can also create generic Groups for things like District, Council, School to keep information categorized.

The form to Add a Group is almost the same as the one to Add a Den or Patrol.

Adding Members

Its finally time to get member information into your Unit Roster. There are four ways you can add members.

Manually

There are buttons at Admin/Members/Add to add Scouts, Adults, and whole Families to the Roster.

If you only need to add a few members at a time, this is a good option as these forms will guide you through collection of the information and allow you to enter all the information at once.

Roster Import

If you have a larger number of Scouts, Adults, or Families to add to your Roster this is a good option.

You can download an example Microsoft Excel spreadsheet from Admin/Online Help/Importing Members/Roster Import to get you started.

This format is a single row for each family. Columns on the spreadsheet allow you to import name and contact information along with Dens/Patrols. Once imported it will create family and Den/Patrol associations. You can then add additional information about members, assign them to additional groups, and assign leadership positions to complete your Unit Roster.

Follow the directions and make sure to save into CSV format before uploading, and you will have your Roster loaded in no time.

Note: There is a bug in the Mac version of Microsoft Office. It will not save Excel files in a true CSV format. You will need to use a different spreadsheet application on the Mac or use the PC version of Microsoft Excel.

PackMaster/TroopMaster Import

If your unit uses PackMaster or TroopMaster to manage your Roster and Advancements, you can import directly from that program to fully "mirror" the Unit Roster on your SOAR website.

See Admin/Online Help/Importing Members/ PackMaster or Troopmaster for full details.

Self Registration

There is an option at Admin/Control Panel/Membership for the Individual Accounts membership mode that will allow you to have your members "self register".

Each member will need to go your unit website and use the "Create new account" link in the Login box to create an account with basic information. You will then receive an email that a member has registered. See the section of Self Register Approval for further instructions.

Until they are approved they cannot login or see anything on your unit website. Once they are approved they can login and add more information to their Roster entry.

We keep this option available because there are a handful of units that still want it.

Note: We do NOT recommend using the "self register" option. It sounds great in theory. The problem is that to achieve effective communication, you need each and every member to self register in a timely manner. Until then, they are not receiving communications. There is still administrative after registration – you need to create family accounts, , add them to Dens, Patrols, Groups, and assign them leadership positions. Much better to spend the up-front time once to get the Unit Roster completely loaded and communication working.

Group Membership

You now have Dens, Patrols, Groups, members, and families in your Roster. Now it is time to associate members with the Dens, Patrols, and Groups.

This can be done with the Group Members button at Admin/Members/Manage. This page shows you a matrix of all Active Scouts/Adults and all Active Dens, Patrols, and Groups. Adding or removing members from Groups is as simple as changing the appropriate checkboxes.

There is no restriction to what member type can belong to a group, what member type can be a Group Leader, how many groups a member can belong to, or how many members a group can have. This gives you great flexibility in capturing your unit's own unique organizational structure and effectively communicating with them.

Note: While there is no limit – a Scout should only belong to one Den/Patrol. If you want Scouts to belong to other groupings, create a Group (instead of Den or Patrol) and associate them with that. This is especially important in Packs where a Scout's Rank comes from the Den they are associated with.

Leadership Positions

Many Scouts and Adults hold Leadership Positions in your unit. Without them, your unit would not flourish.

Keeping track of what positions the Scouts/Adults hold and which are Leaders for a specific Den, Patrol, or Group is easy with the Leaders button at Admin/Members/Manage.

To remove existing positions from a member, use the checkbox in the Delete Positions column.

To add a Leadership Position for a member, select the drop down box in the Add Position column and select the position they hold.

For Group (Den/Patrol) Leaders select the Leadership Position and Den, Patrol, or Group from the drop down boxes in the Add Group Leader column.

When you have made all your changes, click the Change Leadership Assignments button at the bottom of the page.

Your SOAR website comes standard with the most common Cub Scout and Boy Scouts Leadership Positions for both Scouts and Adults. Often you will have additional leadership positions that are not currently available in the drop down boxes. Use the Youth Positions and Adult Positions buttons at Admin/Members/Options to add any positions you need. You can also use these functions to create a custom sort order for the positions. Use the Weight field like in the Groups to alter the sort order.

Note: For standard BSA positions like Committee Chair, Cubmaster, Scoutmaster, ASM, Committee Member, Den Leader, Patrol Leader, you should use the leadership positions we have already provided. As we move forward and add more functionality to the Unit Roster and your SOAR website we will be keying off these existing leadership positions. If you create your own custom positions for ones that already exist, you may have to go back later and change them.

Member Permissions

Now that your Unit Roster is looking complete, you are going to want help adding content, managing the Unit Roster, and administering your unit website.

If you are using Simple Membership, you can hand out the appropriate shared account username and password to those individuals.

If you are using Individual Accounts, you can assign permissions at Admin/Members/Manage/Member Permissions.

Just like the Group Membership page, adding and removing permissions from members is as easy as changing a few checkboxes. When you are done with your changes, use the Change Permissions button at the bottom of the page to save your changes.

Roster Privacy

Now that you have all this information in your Unit Roster you should decide who will be able to see what parts of that information.

The Privacy button at Admin/Members/Options will help you enforce those decisions.

There are four categories of members you can make choices for:

Unit Members

- Those using the 'member' shared account.
- Any Individual Account with no other permissions.

Leaders

- Only applicable for those with Individual Accounts.
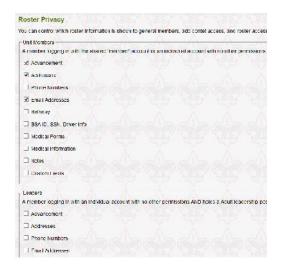- Any member that can login and holds an Adult Leadership position.

Add Content

- Those using the 'leader' shard account.
- Any Individual Account with the "Add Content" website permission.

Manage Roster

- Those using the 'roster' shared account.
- Any Individual Account with the "Manage Roster" website permission.

The 'admin' shared account and any Individual Account with the "Administrative" website permission can see all data in the Unit Roster.

For each of these categories of members you can control if they see the following information.

Advancement – Any advancement information that comes from PackMaster or TroopMaster.

Address – Street, City, State, and Zip Code.

Phone Numbers – Home, work, and cell phone.

Email Addresses – any email addresses for the member and their contact preferences.

BSA ID, SSN, Driver Info – Privacy sensitive information that includes the member's BSA ID number, Social Security Number, Driver's License number and State, Occupation, and Employer.

Medical Forms – Dates for the BSA Medical Forms

Medical Information – Additional medical information including emergency contacts, medications, doctor, and insurance information.

Notes – Any notes for the member.

Custom Fields – Any custom fields you have created to collect additional information.

Roster Reports

By using Menu/Pack Roster or Menu/Troop Roster administrators and members can view the Unit Roster information you are allowing them.

General members will see the Pack/Troop, Den/Patrol, and Groups sections. What information they see in each of these reports is controlled by the Privacy settings.

Those with Manage Roster and Administrative permissions will see an extra section for Administrative reports. These will include reports on Inactive members, Medical Form dates, and Custom Fields.

Managing Members

Your Unit Roster is pretty much complete at this point. Now it is time to find out how to manage members and their accounts on an ongoing basis.

The "central" way to manage members is through the Members button at Admin/Members/Manage.

The Filter at the top will allow you to easily narrow down what unit members you are looking for.

Active drop down box

   Active – any member with the "Active" checkbox

   Inactive – members without the "Active" checkbox

   Pending – members that have self registered and
      have not been approved yet

   All – all of the above

Type drop down box   - Scouts, Adults, or Both

Email – Primary Email Address only

Last Access – When did the member last login

Created – When was the member added/imported into
      the Unit Roster

Updated – When was the Roster entry for this member
      last updated

Descriptions of the columns in the display are:

Name – The full name of the member, last name first

Role – Scout or Adult

A – Active = X, Inactive = no display

L – Can Login = X, Cannot Login = no display

Primary Email

PM or **TM** – An "X" if this member/account going to be
      synched with the next PackMaster/
      TroopMaster import

AC – Add Content permission

MR – Manage Roster permission

ADM – Administrative permission

You can take action on multiple members by using the checkbox on the left of the member's name and the drop down box at the bottom of the page.

You will receive a confirmation screen for any of these actions that details exactly what is going to occur before you confirm the change.

You can also manage certain actions by viewing the member's roster entry directly. For those with Manage Roster or Administrative permissions, they will see the Roster view of a member in the picture below.

Edit Member – this tab will let you edit the primary member's roster entry you are viewing.

Edit Family – this tab will let you edit the entire family at once.

Unlink – This will disassociate the member from the rest of the family. No other family associations will be affected. A confirmation screen will be provided before this action is undertaken.

Delete – This will remove the member from the Unit Roster and wipe all their information from your unit website. A confirmation screen will be provided before this action is undertaken.

Add Family Member – You can select the relationship and person to link to this family from the drop down boxes above the right hand column.

Self Registration Approval

If you are in the Self Registration mode at Admin/Control Panel/Membership you will receive an email each time a new member registers.

To view these "pending" members, do the following:

- Go to Admin/Members/Manage/Members.
- Select "Pending" from the Active pull down at the top of the page.
- Click on the Filter button to the right.

You will then see all the accounts that are waiting for approval. To approve them, do the following:

- Click the checkbox to the left of their name.
- Use the checkbox next to the column label "Name" to select everyone shown.
- Select "Make Active" from the – SELECT ACTION – dropdown at the bottom of the page.
- Click Submit Changes
- Verify your request on the next page.

Now all those members will be able to login using the username and password they created during the self-registration process.

Note: You will most likely have additional administrative work to do after approving these members. Link them to other family members, add additional family members, assign them additional website permissions, place them in Dens/Patrols/Groups, assist Leadership Positions to them, etc.

Tips

The majority of Packs use Simple Membership and the majority of Troops use Individual Accounts

Do not try to use a combined mode of Simple Membership and Individual Accounts.

Individual Accounts

- Each account should have an email address. That way you can send account information to them. It is OK if the email address is a duplicate of another family member.
- We do not recommend the "self register" mode for Individual Accounts. You will end up doing more work approving/linking families. Easier to just Import a Roster and then all members are immediately receiving communications vs. waiting till they register for an account.
- If you do not see the "Forgot Password" link you do not have your membership mode set properly at Admin/Control Panel/Membership.

Simple Membership

- Change the passwords at least once a year for security reasons at Admin/Control Panel/ Membership.

Roster

- Each Scout and Adult should have a separate Roster entry and be linked together into families.
- A Scout should belong to one, and only one, Den/Patrol. They may belong to as many Groups as you want.
- Don't go overboard with too many Groups, it can create more confusion for members.
- Double check who has permission to view what member information at Admin/Members/Privacy.

TroopMaster/PackMaster

- Make sure to use the TroopMaster/PackMaster Import and NOT the Member Import.

- Turn off the Edit Own option at Members/Roster Settings. You don't want members updating contact information on the website only to have it overwritten by the next Import.
- Make sure you are using the "link" feature in TroopMaster/PackMaster for adults that are parents and leaders as well as for parents that have multiple scouts.
- Do not use the "self register" mode of Individual Accounts and do not manually create any Roster/account entries for members. All Roster/accounts for active members should be created from the Import. It is OK to manually add Roster/account entries for people not listed in TroopMaster/PackMaster.
- Unless you have a really good reason, always use the "remove old members" and "notify" Import options.

Administration

- At least two people in the unit should have the 'admin' username and password.
- Keep your primary contacts updated at Admin/Control Panel/Contacts.
- The email address Site EMail at Admin/Control Panel/Contacts can retrieve the 'admin' password.