How to create a formation event

Group or Section Leader

A formation event is typically held at the Group or Section level. Use this resource to assist in creating a formation event in ScoutMap.

Create Event in Formation Calendar

Follow these steps to create an event in the Formation Calendar:

1. Login to ScoutMap.
   https://scoutmap.my.site.com/scouts/s/login/
   (refer to guide '*How to log in to ScoutMap with Single Sign On*')

2. Click the **Events and Calendar** option (may be under the **More** menu dropdown), then the **Group Calendar** tab,

   The formation calendar that appears is for your primary section. Click the 'Section and their Members' link to navigate to other available calendars.

3. Use the date pickers to select the desired event date (eg 20 Oct 2024).

4. Click-drag a time range for the event in the time field.

5. Enter the event details in the reservation pop-up window by:

a. Click the **Reservation Type** dropdown and select 'Event Reservation Type'.
b. (if required) Adjust the **Start** and **End** dates and times.
c. Click the **Type** dropdown and select 'Event'.
d. Leave the **Status** as 'Draft'.
e. Type in **Event Name** and **Location** details.

f. Pick a **Registration Closing Date**.
g. Select one of the fee checkboxes:
   i. **Event Fee Required** – payment of fees will be part of the event registration process. Fees paid within ScoutMap go into a branch account.
   ii. **Free Event** – there are no fees for the event. Do not create a Payment Schedule.
   iii. **Collect Event Fees Outside Registration –** Fees are collected external to the event registration process in ScoutMap. As a suggestion enter the event payment details into the Description field.
h. Type in a **Description**.
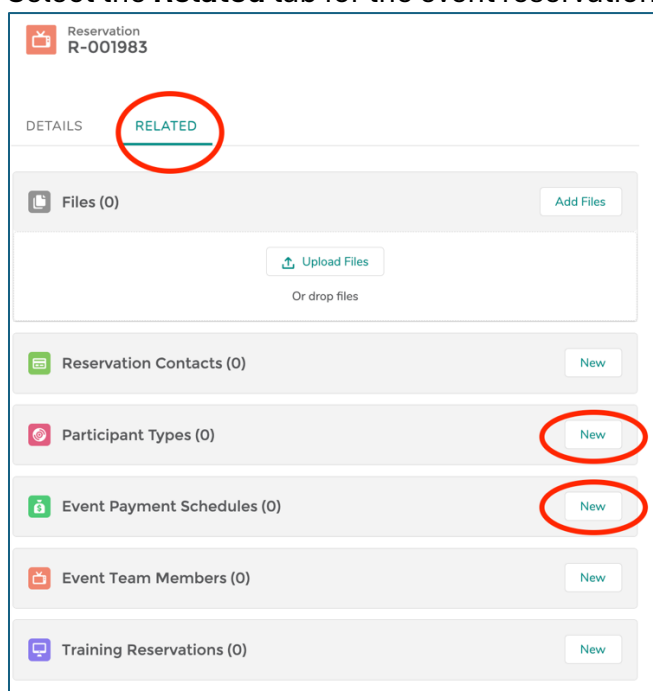i. Click the **Save** button.

6. Reopen the event by clicking it in the formation calendar.

7. Click the **View in Salesforce** button.

8. Select the **Related** tab for the event reservation.

9. Repeat the following steps to add one or more **Participant Types**. You only need different participant types (eg Youth Members, Leaders) if there are different fee structures, LIC approval or team membership requirements:
   a. Click the **New** button in the **Participant Types** box.
   b. In the **New Participant Type** pop-up window:
      i. Type in a **Participant Type Name** (eg Youth Member).

ii. Type in a **Fee** value.

iii. Select eligible sections in the **Eligibility** picker (eg only Cubs Scouts).
iv. (if required) Type in a comma delimited list for **Option 1** (eg if this option is to be used for event branded shirts then type in shirt sizes 'S, M, L, XL'). Repeat for other two Options as required.
v. (if required) Select 'Is a payment schedule required' checkbox.

vi. Click the **Save** button.

10. Repeat the following steps to add **Event Payment Schedules** to the matching participant type (eg Youth Member):
   a. Click the **New** button in the **Event Payment Schedules** box.

b. In the **New Event Payment Schedule** pop-up window:

New Event Payment Schedule

Reservation Number

Owner
Ian Case

Fee
1.00

Payment Due Date
19/10/2024

Participant Type Name
Youth Member

Default payment
☑

Reservation
🗓 R-001983 ✕

Participant Types
◎ Youth Member ✕

Cancel   Save & New   Save

   i.   Type in the fee amount for this schedule.
   ii. Select a **Payment Due Date**.
   iii. Type in a **Participant Type Name** field.
   iv. (if required) Select the **Default Payment** checkbox.
   v.   Select the **Participant Type** for this payment schedule.
   vi. Click the **Save** button.

11. Repeat the following steps to add **Event Team Members** who will be able to view event participants:
    a. Click the **New** button in the **Event Team Members** box.

b. In the **New Event Team Members** pop-up window:

i. Type in a **Name** for this team member type.
ii. Select a R**ole** for the dropdown (eg Event Team).
iii. Select a **Member** from the dropdown.
iv. Select a **Access Level** from the dropdown (eg Create/Read/Write).
v. Tick the **IsActive** checkbox.
vi. Click the **Save** button.

12. Select the **Details** tab for the event reservation. Change the **Status** to 'Pending Approval' by:

a. Click the pencil icon next to the **Status** field.
b. Remove the 'Draft' status by clicking the 'x'.
c. Search for next status by typing 'Pend'.
d. Select 'Pending Approval'.
e. Click the **Save** button (not shown in screenshot).

13. Ask the next level up (eg Group Leader, District Commissioner) to approve the event. (refer to guide '*How to approve an event*')

14. Click the **Events and Calendar** option (may be under the **More** menu dropdown), then the **Formation Events** tab.

15. Open the formation event by clicking on the link in the **Reservation Name** column.

16. Select the **Details** tab for the event reservation. Change the **Status** to 'Registrations Open' by:
a. Click the pencil icon next to the **Status** field.
b. Remove the 'Approved' status by clicking the 'x'.
c. Search for next status by typing 'Reg'.
d. Select 'Registrations Open'.
e. Click the **Save** button (not shown in screenshot).

Next Steps:
- Monitor event registrations under Reservation Contacts using the **Related** tab for the event reservation.
- Set the Status to Completed after the event has concluded.