

# 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')

The image shows the ScoutMap login page. It has a dark blue header with the URL 'scoutmap.my.site.com/scouts/s/login/'. Below the header, there are input fields for 'Username' and 'Password', a 'Log in' button, and links for 'Forgot your password?', 'Not a member?' (with a 'Single Sign On' button), and 'Are you an employee? Login here'.

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

The image shows the ScoutMap Group Calendar interface. At the top, there's a navigation bar with 'Events and Calendar' selected. Below it, there's a 'Group Calendar' tab. A red circle highlights 'Canning Sea Cub Unit' in the list of units. Below the unit list, there's a date picker showing 'Sunday, October 20 2024'.

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.

The image shows the ScoutMap time selection interface. It has a date picker at the top showing 'Sunday, October 20 2024'. Below it, there's a time field with a grid of time slots from 9 AM to 12 PM. A red circle highlights the date picker, and a red arrow points to the time field.

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

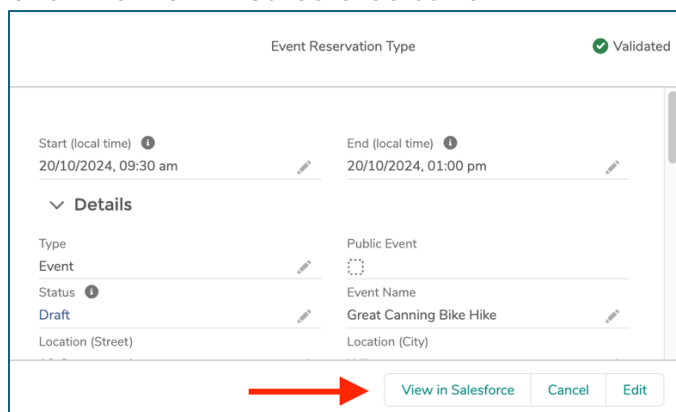
The image shows the ScoutMap Event Reservation pop-up window. It has a header with 'Event Reservation Type' and a dropdown arrow. Below the header, there are fields for 'Start (local time)' and 'End (local time)', each with a date and time picker. Below these, there's a 'Details' section with a 'Type' dropdown (set to 'Event'), a 'Status' dropdown (set to 'Draft'), and a 'Public Event' checkbox. There are also fields for 'Event Name', 'Location (Street)', 'Location (City)', 'Location (State/Province)', and 'Location (Country/Territory)'. Red arrows point to the 'Event Reservation Type' dropdown, the 'Type' dropdown, and the 'Status' dropdown.

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

- Pick a **Registration Closing Date**.
- Select one of the fee checkboxes:
  - Event Fee Required** – payment of fees will be part of the event registration process. Fees paid within ScoutMap go into a branch account.
  - Free Event** – there are no fees for the event. Do not create a Payment Schedule.
  - 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.
- Type in a **Description**.
- Click the **Save** button.

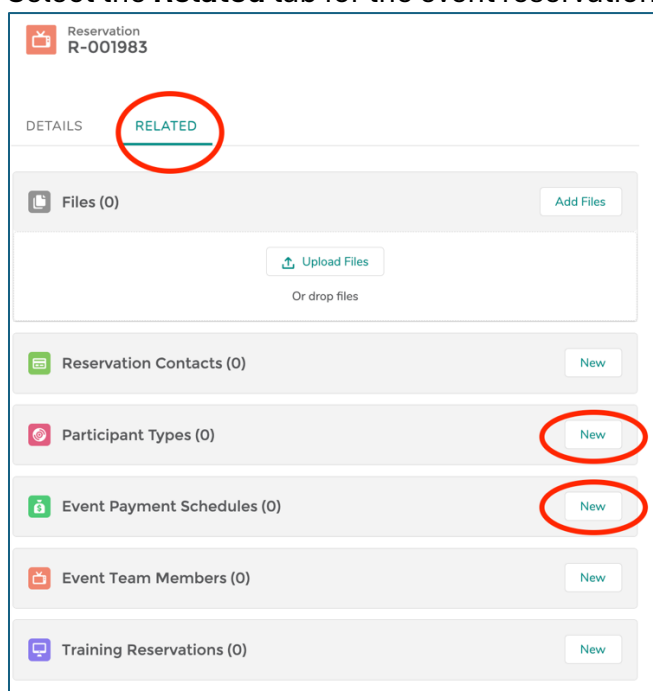
- Reopen the event by clicking it in the formation calendar.

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



The screenshot shows the 'Event Reservation Type' form. At the top, it says 'Event Reservation Type' and 'Validated'. Below this, there are fields for 'Start (local time)' and 'End (local time)', both set to '20/10/2024, 09:30 am' and '20/10/2024, 01:00 pm' respectively. Under the 'Details' section, there are fields for 'Type' (set to 'Event'), 'Status' (set to 'Draft'), 'Location (Street)', 'Public Event' (set to 'Public Event'), 'Event Name' (set to 'Great Canning Bike Hike'), and 'Location (City)'. At the bottom right, there are three buttons: 'View in Salesforce', 'Cancel', and 'Edit'. A red arrow points to the 'View in Salesforce' button.

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



The screenshot shows the 'Reservation R-001983' page. At the top, there is a 'DETAILS' tab and a 'RELATED' tab. The 'RELATED' tab is selected and highlighted with a red circle. Below the tabs, there are several sections: 'Files (0)' with an 'Add Files' button and an 'Upload Files' button; 'Reservation Contacts (0)' with a 'New' button; 'Participant Types (0)' with a 'New' button highlighted with a red circle; 'Event Payment Schedules (0)' with a 'New' button highlighted with a red circle; 'Event Team Members (0)' with a 'New' button; and 'Training Reservations (0)' with a 'New' button.

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.

**New Participant Type**

\* = Required Information

**Information**

\* Participant Type Name  
Youth Member

Maximum Participants

Available for Team  
☐

\* Fee  
\$80.00

Owner  
Ian

- 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.

\* Eligibility

Available

Leader

Volunteer

Non Member

Chosen

Joey Scouts

Cub Scouts

Scouts

Venturer Scouts

Rovers

Option 1

Option 2

Option 3

Is a payment schedule required  
☒

Endorsement Questions

Cancel Save & New Save

- 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:

The screenshot shows a 'New Event Payment Schedule' pop-up window. The fields and their values are as follows:

- Reservation Number: (empty)
- 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

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and '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:

**New Event Team Member**


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\* = Required Information

**Information**

* Name <input type="text" value="Cub Leader"/>	Owner Ian <input type="text"/>
* Role <input type="text" value="Event Team"/>	* Event <input type="text" value="R-"/> <input type="text"/>
* Member <input type="text" value="Ian"/> <input type="text"/>	IsActive <input type="checkbox"/>
* Access Level <input type="text" value="Create/Read/Write"/>	

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- i. Type in a **Name** for this team member type.
- ii. Select a **Role** 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:

Reservation  
R-001983

**DETAILS** RELATED

▼ **Reservation Information**

Reservation Name R-001983	Event Name Great Canning Bike Hike
Status  <u>Draft</u>	Account <u>Canning Sea Cub Unit</u>
Logo <input type="text"/>	Has Teams <input type="checkbox"/>
Registration Closing Date 19/10/2024	Free Event <input type="checkbox"/>
Event Fee Required <input type="text"/>	More Info URL <input type="text"/>



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

Reservation R-001983

DETAILS RELATED

\* = Required Information

Reservation Information

Reservation Name: R-001983

Event Name: Great Canning Bike Hike

Status: Pending Approval

Account: Canning Sea Cub Unit

Logo: ☐

Has Teams: ☐

To remove the selected record, press Backspace or Del.

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.

Home Assigned Tasks WA Bookings Book Now Cases/Requests/Enquiries Events and Calendar

Formation Events Branch Events Event Participants Group Calendar Events Pending Approval My Formation Events

Formation Events

3 items • Sorted by Reservation Name • Filtered by All reservations - Status, Account, Reservation Type • Updated a minute ago

Search this

	Reserv...	Event Name	Acco...	Status	Local S...	Lo...	Local E...	Lo...	Registr...
1	R-001649	Joey Bounce	Account	Approved	24/6/2024	17:00	24/6/2024	18:00	20/6/2024
2	R-001892	AJ25 PreJam	Canning S...	Comple...	21/9/2024	09:30	23/9/2024	14:00	15/9/2024
3	R-001983	Great Canning Bike Hike	Canning S...	Approved	20/10/2024	09:30	20/10/2024	13:00	19/10/2024

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:

- Click the pencil icon next to the **Status** field.
- Remove the 'Approved' status by clicking the 'x'.
- Search for next status by typing 'Reg'.
- Select 'Registrations Open'.
- Click the **Save** button (not shown in screenshot).

Reservation R-001983

DETAILS RELATED

\* = Required Information

Reservation Information

Reservation Name: R-001983

Event Name: Great Canning Bike Hike

Status: Registration Open

Account: Canning Sea Cub Unit

Logo: ☐

Has Teams: ☐

To remove the selected record, press Backspace or Del.

**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.