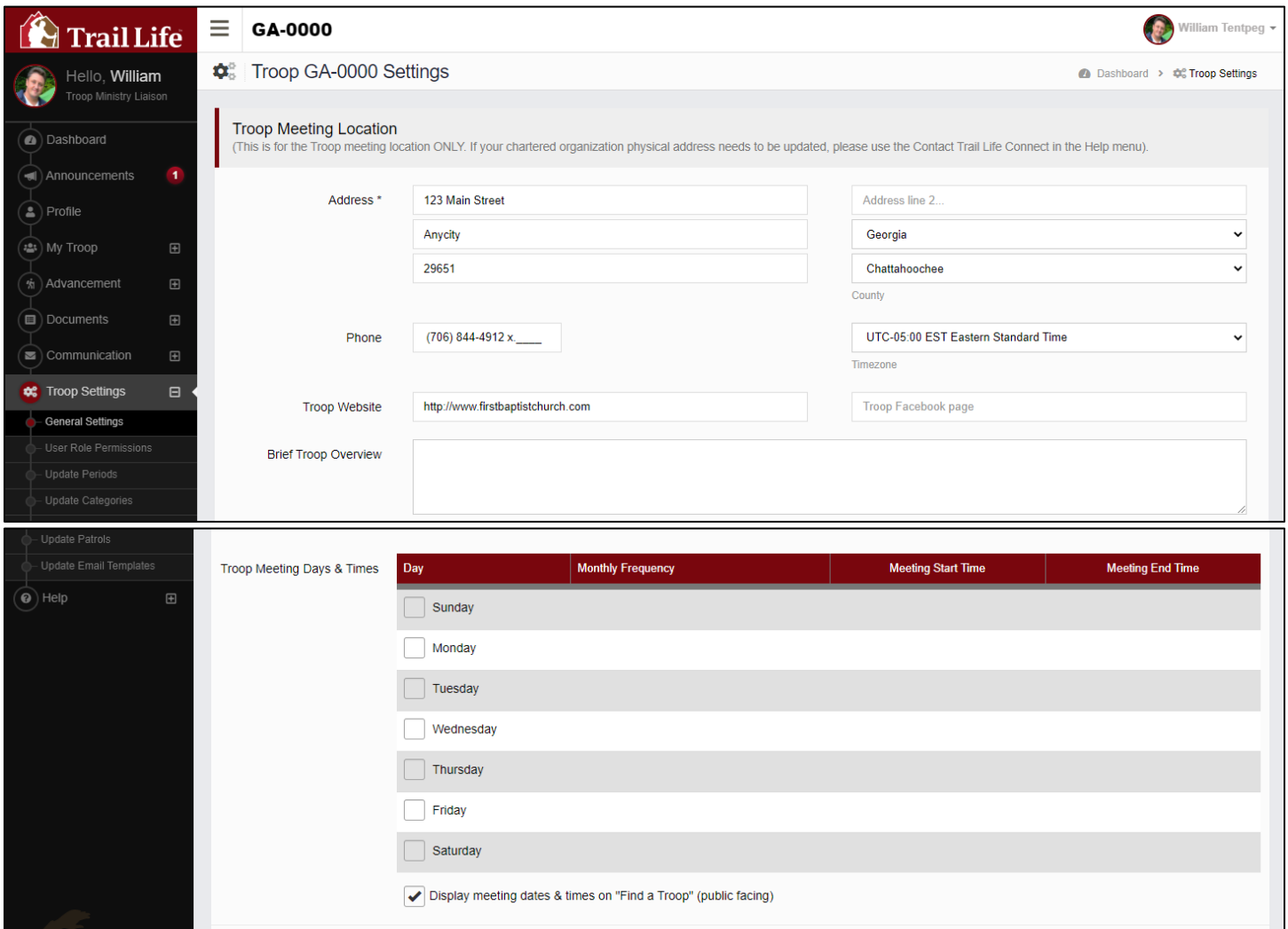



## Troop Level Find a Troop and Member Prospects Tool

This document provides an overview of the Find a Troop Settings and functions of the Member Prospects tool at the Troop level. Views shown will be from the perspective of the Troop Ministry Liaison.

### Find a Troop Settings

Core Leaders for each Troop will want to navigate to the Troop's 'General Settings' page by expanding "Troop Settings" on the left menu, and then choosing "General Settings." The Address entered under the 'Troop Meeting Location' section, as well as the website link, Facebook page, and Troop overview are all part of the information items that will appear for someone who clicks on your Troop's locator pin on the Find a Troop map. In addition, you can choose to display your Troop's meeting days & times if desired.



 GA-0000
William Tentpeg

Dashboard

Announcements 1

Profile

My Troop

Advancement

Documents

Communication

Troop Settings

General Settings

User Role Permissions

Update Periods

Update Categories

Update Patrols

Update Email Templates

Help

### Troop GA-0000 Settings

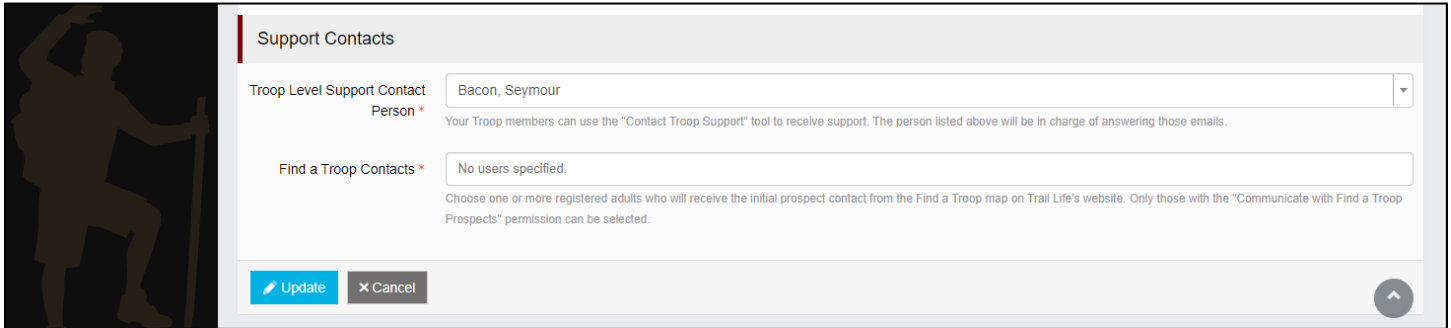
**Troop Meeting Location**  
(This is for the Troop meeting location ONLY. If your chartered organization physical address needs to be updated, please use the Contact Trail Life Connect in the Help menu).

Address *	123 Main Street	Address line 2...	
	Anycity	Georgia	▼
	29651	Chattahoochee	▼
		County	
Phone	(706) 844-4912 x____	UTC-05:00 EST Eastern Standard Time	▼
		Timezone	
Troop Website	http://www.firstbaptistchurch.com		
Troop Facebook page	Troop Facebook page		
Brief Troop Overview			

Troop Meeting Days & Times	Day	Monthly Frequency	Meeting Start Time	Meeting End Time
<input type="checkbox"/>	Sunday			
<input type="checkbox"/>	Monday			
<input type="checkbox"/>	Tuesday			
<input type="checkbox"/>	Wednesday			
<input type="checkbox"/>	Thursday			
<input type="checkbox"/>	Friday			
<input type="checkbox"/>	Saturday			
<input checked="" type="checkbox"/>	Display meeting dates & times on "Find a Troop" (public facing)			

Under the 'Support Contacts' section, leaders can select the primary individual who will be the main Troop Level Support Contact Person when someone clicks the "Contact Troop" link under the Trail Life Connect Help menu. However, the second item, which pertains to Find a Troop and Member Prospects, is where leaders can select one or more individuals who will receive the initial email notification when a new Member Prospect completes the contact form for your Troop on the Find a Troop map. Choose as many individuals as you wish, provided their role has the assigned permission to "Communicate with Find a Troop Prospects."

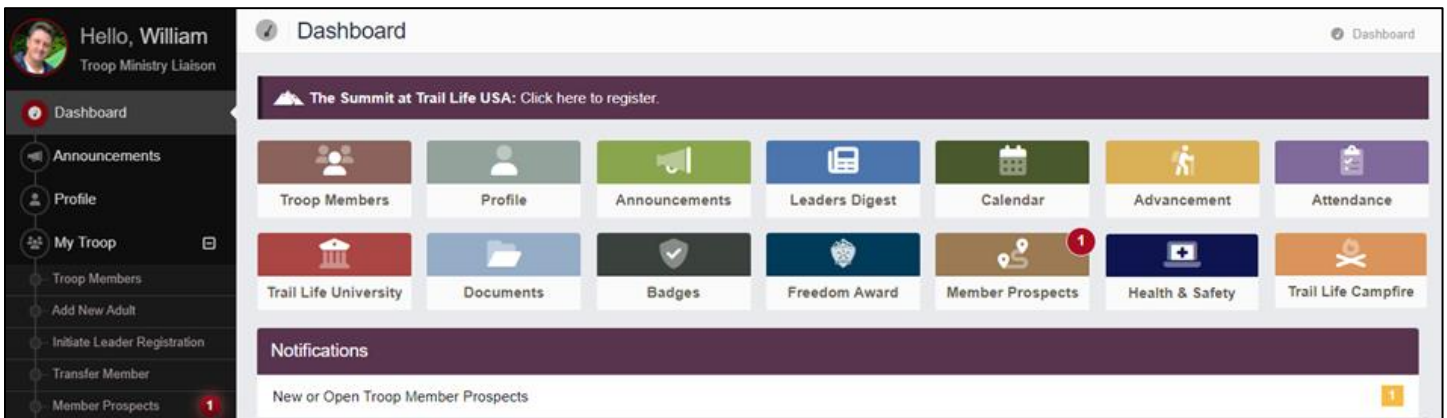


After making changes on the General Settings page, click the "Update" button to save the changes.

### Member Prospects Tool

For Troop Leaders with permissions, the "Member Prospects" tile icon will appear on the Dashboard, as well as a link to "Member Prospects" under "My Troop" on the left navigation menu. When active prospects are present, a numerical status indicator will alert as to how many are currently present. An additional link can be found under the 'Notifications' section on the Dashboard. Member Prospects are added to the list by:

- An individual submitting an inquiry to your Troop via the contact form on the Find a Troop website
- Manually adding a prospect within the tool



Clicking any "Member Prospects" link, will take you into the "Find a Troop Prospects" page, where prospect records will be listed. You will find columns for current status, the prospect name and last contact date. These columns contain sort, filter, and search options so you can locate specific prospects. You will also find a button to "Add New Prospect." Clicking the expand icon to the left a prospect record will provide a preview of their information, the communication history, and a button to click to view more details or make updates to the prospect record.

The default status filter is set to “New & Open.” You can change this via the drop-down menu to also view any prospects who are “On-Hold,” as well as any prospects who have previously been “Closed.”

The “Last Contact Date” column shows when you, or someone in your Troop, last made contact with the prospect. Contact with each prospect should be initiated within the Member Prospect tool (by clicking to “View/Update Prospect” and choosing to email them, or add notes to the history.) If the prospect is contacted outside of the tool, the system has no way of knowing that contact was made – it is important to keep communication up-to-date and flowing within the tool.

As time passes, the number of days will increase since the last contact. If 7 days pass with no contact recorded in the tool, that prospect record will turn orange in the list (to visually show it has been a week or more.) If 14 or more days pass with no contact recorded in the tool, that prospect record will turn red in the list (to visually show a greater sense of urgency and need to make contact.) Email notifications have also been configured to notify key leaders if a prospect is not being contacted in a timely manner:

- If 7 days pass, the Core Leaders of the Troop are notified of the time elapsed since last contact
- If 14 days pass, the Area Point Man is also notified of the time elapsed since last contact
- If 21 days pass, the Regional Team Leader is also notified of the time elapsed since last contact
- If 28 days pass, the Home Office is also notified of the time elapsed since last contact

Each time a Troop leader contacts the prospect within the tool, the counter resets to zero days. The goal is to not allow a prospect to go longer than 7, 14, 21, or 28 days with no contact. These notification safeguards are in place to ensure that a potential Troop prospect does not get missed or fall through the cracks, but instead locates a Troop they can join.

## Viewing/Updating a Prospect

When viewing the list of prospects, you can either click the “View” icon to the right of their record in the list or click the “View/Update Prospect” button if you’ve expanded their record. This action will take you from a summary view of their information into the details of their prospect record and allow you to view more information as well as make any updates or take an action.

The screenshot displays the Trail Life Connect interface for a prospect named Trailman, Austin. The top navigation bar shows the troop number GA-0000 and the user William Tentpeg. The main heading is "Prospect history for Trailman, Austin".

**Prospect Details (Left Panel):**

- Trailman, Austin** | Status: New
- Added on: 11/10/22 9:22 PM
- Latest entry on: 11/10/22 9:22 PM
- Email: austin.t@trailifeconnect.com (Please use the Prospect tool for all communications)
- Address: Belton, SC 29627
- Fields: Child, Gender, Age, Grade
- Buttons: Update or add more details, Return
- Note: Important note about adding prospect details
- Instruction: Take action by making a selection below the Prospect History.

**Prospect History (Right Panel):**

- Prospect History**
- Prospect connected with Troop GA-0000** | 11/10/22 9:22 PM
- Content: Contact initiated by Trailman, Austin using the "Connect with a Troop" form.

**Prospect Actions (Right Panel):**

- Send prospect an email
- Add internal note
- Contact later
- Joined or is no longer interested
- Transfer prospect to Point Man

**Email Action Form (Right Panel):**

- Use this action to send an email to a prospect. You can create email templates to help speed up this process. When a prospect replies to the email, it will show up on this history.
- Email Template: No template specified.
- Subject \*
- Email message \* (Rich text editor with icons for bold, italic, link, etc.)

If you need to update the prospect information, including adding youth names and ages, you can click the “Update or add more details” button. Having youth information listed on the prospect record can be helpful if/when the prospect decides to join your Troop (more on that later.)

On the right side, you will see a more detailed view of the Prospect History – all emails and notes will be documented here, with color coding to quickly identify what is an email, note, etc. Beneath the History are the available actions you can take with the prospect. On the left menu of Trail Life Connect, under “Troop Settings,” you will find an option to “Update Email Templates.” In this section, you can create standard email templates to use with new prospects. You can select and use these templates during your communications to save time.

Each of the prospect "Action" items are listed below, with a description of what each does as well as any other relevant notes:

1. **Send prospect an email**

Use this action to send an email to a prospect. You can create email templates to help speed up this process. When a prospect replies to the email, it will show up on this history.

2. **Contact Later**

Use this action if now is not the right time, and you want to re-engage this prospect at a later date. This action disables all dashboard and email reminders until the date you specify. Note that you can still send and receive emails or add notes even if the prospect is on-hold.

3. **Transfer prospect to Point Man**

If a prospect does not fit your Troop, you can transfer them to your Point Man. Your Point Man can make notes and re-assign them to another Troop. (Or add them to the Area Team.)

4. **Add internal note**

You can use this action to document an encounter, such as a phone call, or to add other information about this prospect. Note that additional details about the prospect, such as their address, or names and ages of their children should be added under "Update or add more details".

5. **Joined or is no longer interested**

Use this action to stop the communication process with this individual, and effectively close them out as a prospect. This usually is done if the prospect joins your Troop, or if they indicate that they are not interested. (You will still have access to this record and can re-open it at a later time.) When choosing this action, a reason must be provided. The following options can be selected:

- Joined my Troop\*
- Joined a different Troop
- Sons not old enough yet
- Not interested
- Did not respond to communication
- Joined area team as volunteer
- Would like to start a Troop
- Other (please specify)

\*If "Joined my Troop" is chosen as a reason, a check box will appear below the selection to allow you to "Convert to Troop members."

Select a reason \* Joined my Troop ▼

Convert to Troop members

If checked, upon submitting, this will create the Trail Life Connect account for the prospect within your Troop. The new adult will start off with the non-registered, Parent/Guardian role but can be invited to fully register by Troop leaders, if desired. Also, if any male children are listed on the prospect record, youth Trailman accounts will also be created for them within the Troop if this option is selected. This can save Troop Leaders time without needing to separately add the adult to the Troop, and also save time for the adult in not needing to add their son(s) after they log in. The accounts are already established and ready to sign up or register as desired.