



TroopMaster 2000 Membership Renewal Process

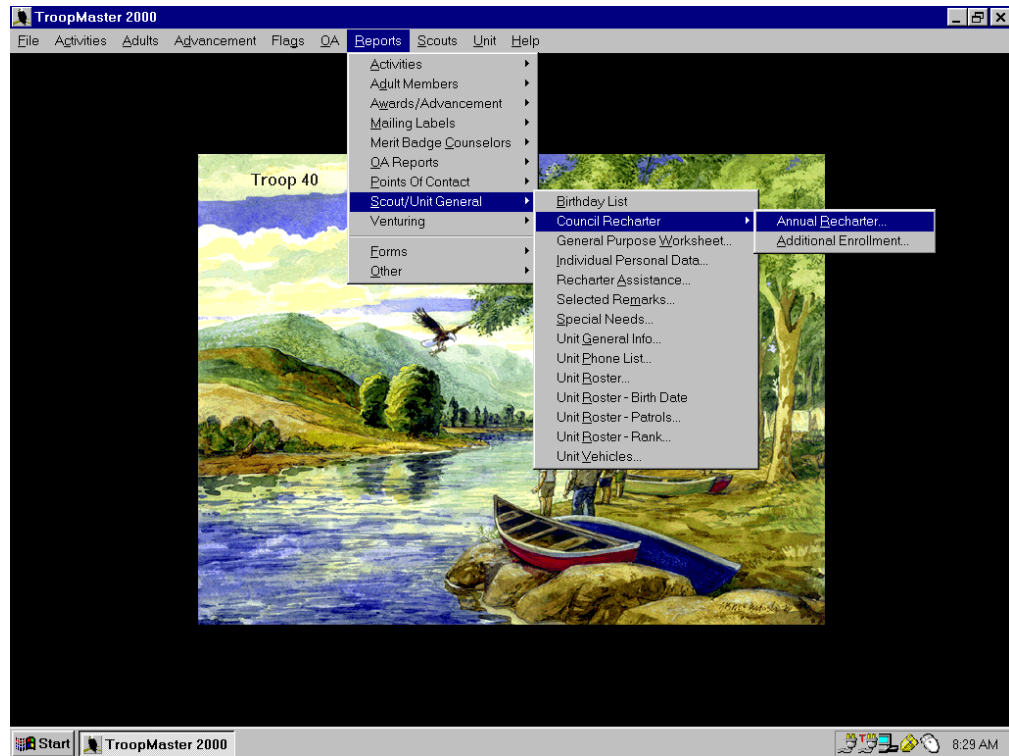
Purpose With the implementation of ScoutNet, the Membership (Charter) Renewal process is becoming easier through the use of TroopMaster and PackMaster software. The purpose of this document is to provide the steps necessary to renew a unit’s charter quickly and easily with TroopMaster 2000.

Membership Renewal The steps outlined below demonstrate how to complete a charter renewal using the TroopMaster 2000 software.

Note: Ensure all Scout/Adult records are up-to-date before starting the Membership (Charter) Renewal process.

Step	Action
1	Launch the TroopMaster 2000 software.
2	Open the Reports menu and move the cursor to Scout/Unit General—Council Recharter—Annual Recharter (Illustration 1-1)

Illustration 1-1



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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Step	Action
3	Verify or enter the proper information in the following fields (Illustration 1-2): <ul style="list-style-type: none"> • Unit Type • Unit Number (<i>Should match the number on your charter renewal package. For example TroopMaster may have the unit as Troop 40 while the Council uses Troop 0040. <u>In this case this field should reflect Troop 0040.</u></i>) • Old Expire Date • New Expire Date • Unit Term (usually 12 months) • Meeting Day • Meeting Frequency • Meeting Time
4	Verify the Pricing Information as follows (Illustration 1-2): <ul style="list-style-type: none"> • Full Registration (currently \$7.00) • Transfer Fee (currently \$1.00) • Boy's Life Subscription (currently \$9.00) • Unit Fee (currently \$20.00)

Illustration 1-2

The screenshot shows a window titled "Council Recharter" with the following fields and options:

- Unit Type: Troop (dropdown)
- Unit Number: 0040 (text box)
- Old Expire Date: 02/28/02 (text box)
- Unit Term (months): 12 (text box)
- New Expire Date: 02/18/03 (text box)
- Meeting Day: Monday (dropdown)
- Meeting Freq: Weekly (dropdown)
- Meeting Time: 7:00pm (text box)
- Pricing section:
 - Full Registration: \$7.00
 - Transfer: \$1.00
 - Boy's Life: \$9.00
 - Unit Fee: \$20.00
- Leader Trained:
- Quality Unit:
- 100% Boys Life:
- Magazine Bulk Delivery:
- Print copy of transmittal file:

Buttons at the bottom: Next >>, Cancel, Help.

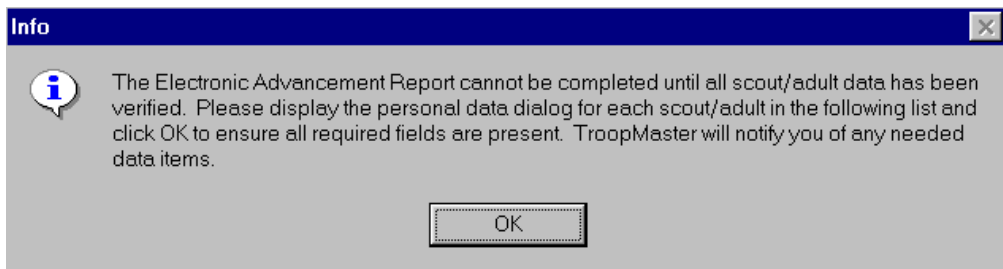
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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Step	Action
5	<p>Place a check in the following fields, as applicable (Illustration 1-2):</p> <ul style="list-style-type: none">• Leader Trained• Quality Unit (Complete the Quality Unit form in the Charter Renewal Package).• 100% Boy's Life• Magazine Bulk Delivery• Print a copy of transmittal file (this will be the unit copy)
6	<p>Click the next button. This action will take you to the Recharter Selection screen; proceed to Step 7 (Illustration 1-5).</p> <p style="text-align: center;">-Or -</p> <p>The message in Illustration 1-3 appears indicating required entries are missing from the Scout/Adult records. Click the OK button for a list of individuals with missing information (Illustration 1-4).</p> <p>Go back to the Scout/Adult management and update the records indicated. Once the Scout/Adult records have been completely filled in, repeat Steps 2 through 6.</p>

Illustration 1-3

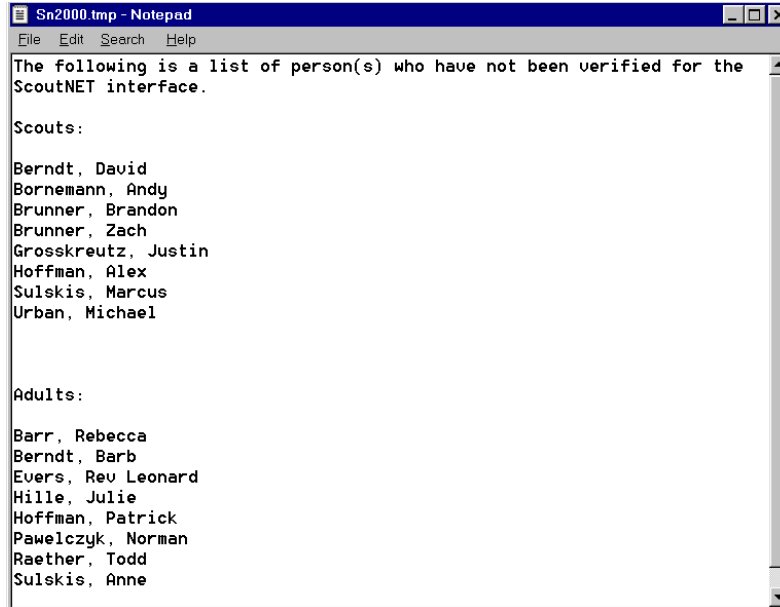


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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Illustration 1-4



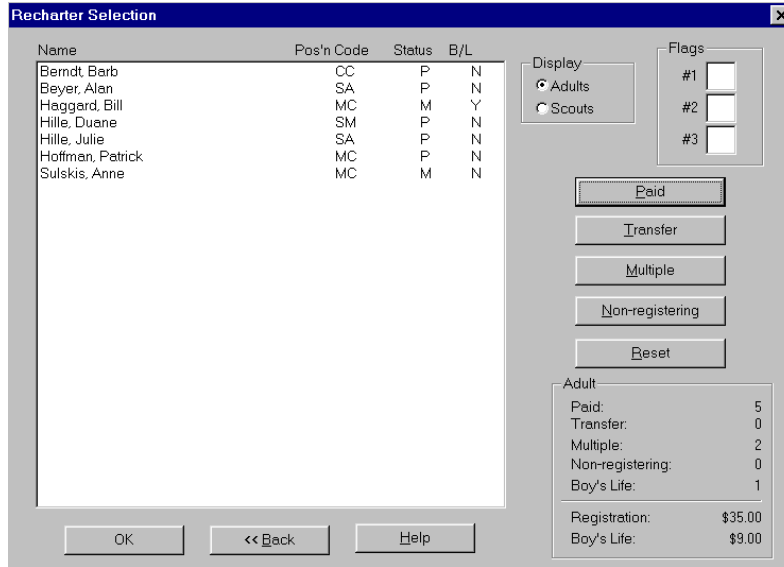
Step	Action
7	<p>Highlight each Adult whom you want to register and click the appropriate button to enter their status (Illustration 1-5):</p> <ul style="list-style-type: none"> • Paid – the individual is paying with the unit. This is their primary position in Scouting. • Transfer – The individual registered with another unit, but is transferring in to this unit. <i>Example: A Cub leader registered with the pack, but is joining the Troop at the time of recharter.</i> • Multiple – The individual holds more than one position in Scouting and this is not their primary position. <i>Example: A Troop Committee Member is also serving as an Assistant Cubmaster and paid their registration with the Pack.</i> • Non-registering – Most likely wont be used. Please do not use this option for adults whom you choose not to register. • Reset – Clears the status field of the highlighted individual. <p>Note: More than one individual can be selected at a time by using the shift or ctrl key.</p>


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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Illustration 1-5



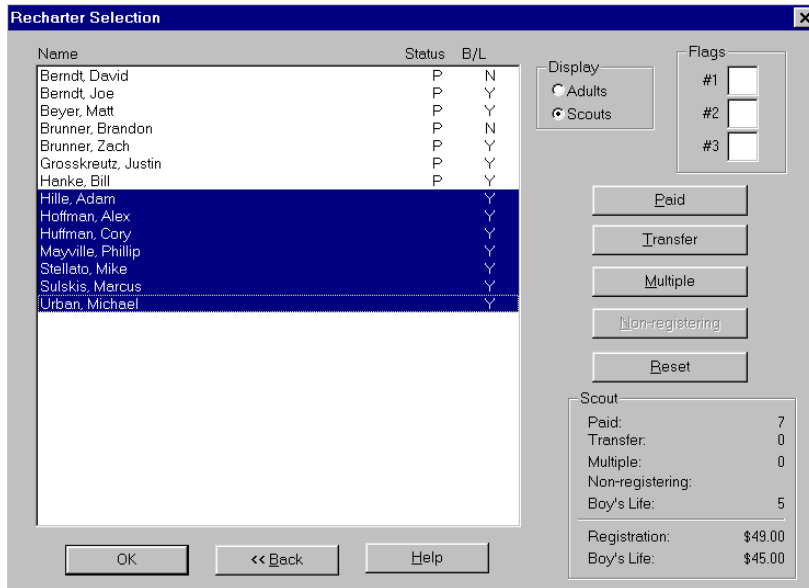
Step	Action
8	<p>Click the radio button or circle next to “Scouts” to go to the next screen (Illustration 1-6).</p> 
9	<p>Highlight each Scout and click the appropriate button to enter their status (Illustration 1-6):</p> <ul style="list-style-type: none"> • Paid – the individual is paying with the unit. • Transfer – The individual registered with another unit, but is transferring in to this unit. <i>Example: An individual paid registration fees with one unit but has decided to transfer into this unit at the time of charter renewal.</i> • Multiple – The individual holds more than one position in Scouting and this is not their primary position. <i>Example: A Scout is also registered in a Venture Crew and paid their registration with the Crew.</i> • Reset – Clears the status field of the highlighted individual. <p>Note: More than one individual can be selected at a time by using the shift or ctrl key.</p>

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TroopMaster 2000 Membership Renewal Process, Continued

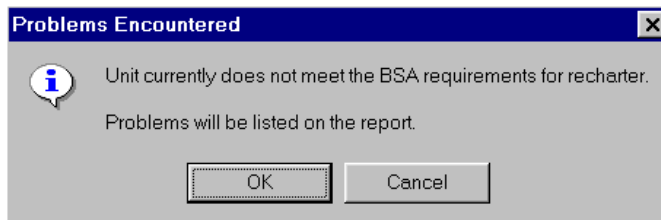
Membership Renewal (continued)

Illustration 1-6



Step	Action
10	<p>Click the OK button. This action will take you to the Report screen (Step 11)</p> <p style="text-align: center;">-Or -</p> <p>The message in Illustration 1-7 appears indicating a problem with the charter. Click the OK button and the Charter renewal report will process. Scroll down to the section labeled <i>Problems noted in the recharter application</i> (illustration 1-8).</p> <p>Exit the Charter Renewal process and make the corrections Indicated. Once the corrections have been made, repeat Steps 2 through 10. As long as you don't exit program, the data already entered will be retained.</p>

Illustration 1-7



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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Step	Action
11	<p>Change the number of copies to “2” and click the Print button to generate paper copies of the Electronic Recharter Report (Illustration 1-9). This form will be signed by the following individuals:</p> <ul style="list-style-type: none"> • Chartered Organization Executive Officer • Council Representative (Unit Commissioner for example) • Unit Leader <p>Retain one for the unit; submit one copy to the Bay-Lakes Council.</p>
12	<p>Click the Close button and the software will provide a message indicating it is preparing an internal report of the information that will be provided to the Bay-Lakes Council (Illustration 1-01).</p> <p>Note: If you did not check the “Print copy of transmittal file” checkbox, then the message in Illustration 1-11 will not appear; skip to Step 15.</p>

Illustration 1-8

Report

Problems noted in this recharter application:

Unit must register an Executive Officer
 Unit must register a Chartered Organization Representative

Charter Renewal Report

Date: 10/10/2001
Time: 09:43:47 Troop 0040

Unit: 0040
District: Gathering Waters-2
Unit Status: _____ **County:** _____
Term (mo): 12

Chartered Organization: Sacred Heart Catholic Chur
 322 S Main St
 Shawano, WI 54186

Executive Officer: _____

Executive Officer

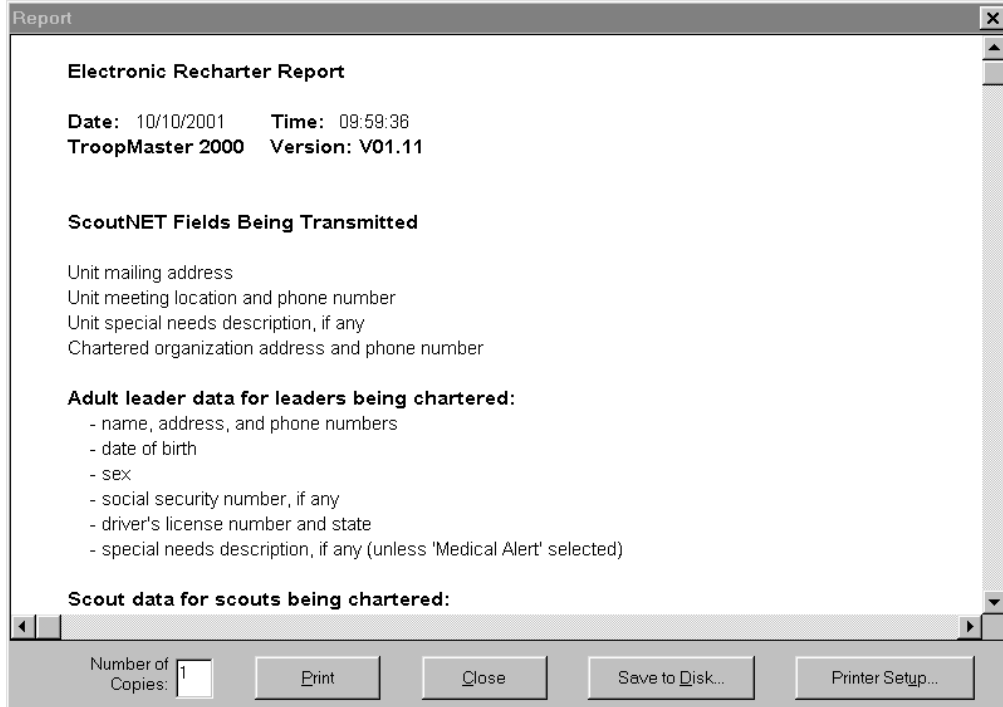
Number of Copies: 1 [Print] [Close] [Save to Disk...] [Printer Setup...]

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TroopMaster 2000 Membership Renewal Process, Continued

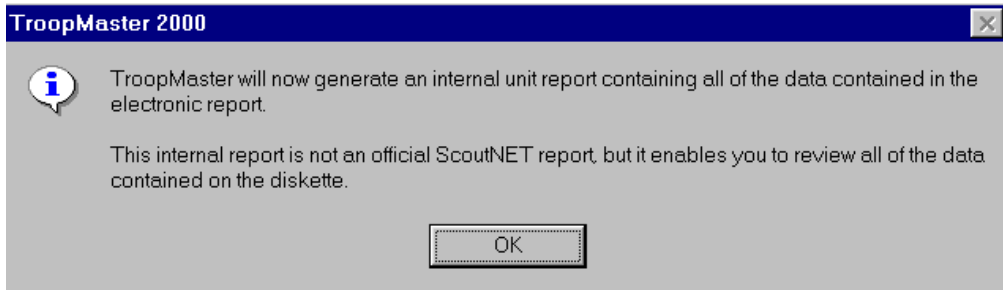
Membership Renewal (continued)

Illustration 1-9



Step	Action
13	Click the OK button and the <i>Printed Copy of Electronic Transmittal</i> report screen appears (Illustration 1-11)
14	Click the Print button to create a copy of the <i>Printed Copy of Electronic Transmittal</i> (Illustration 1-11). (Optional)

Illustration 1-10

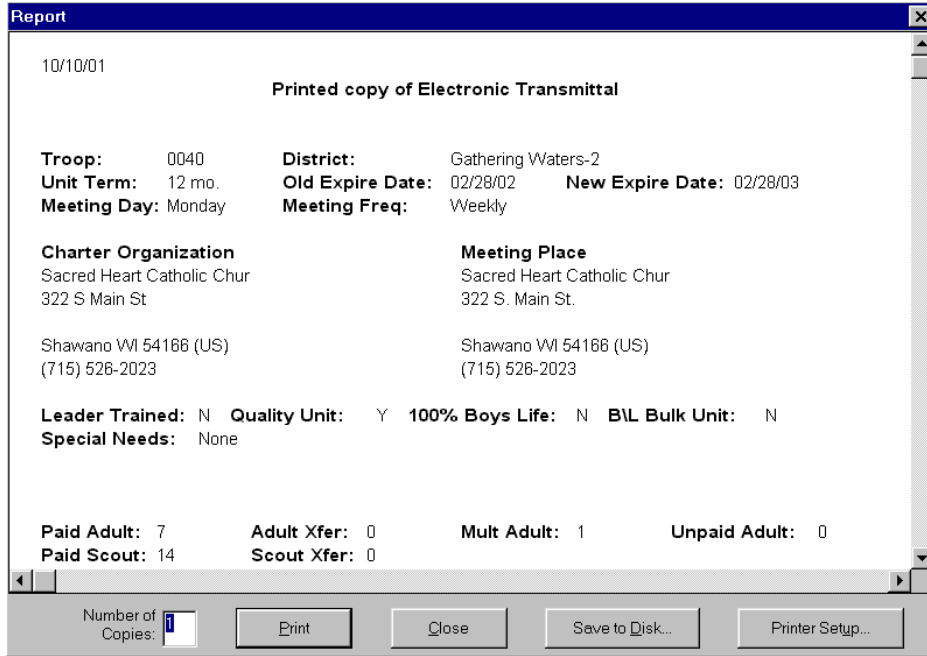


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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

**Illustration
1-11**



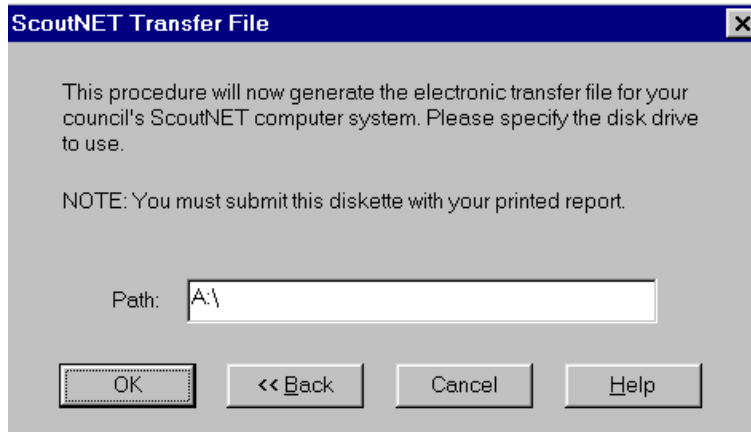
Step	Action
15	Click the Close button and the software will prepare to download the data to a floppy disk (Illustration 1-12).
16	Ensure there is a blank, formatted disk in the disk drive and click the OK button.
17	Label the floppy disk with the following: <ul style="list-style-type: none"> • Unit Number • District • Date • Unit Leader & Phone number

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TroopMaster 2000 Membership Renewal Process, Continued

Membership Renewal (continued)

Illustration 1-132



Renewal Checklist

Place materials in the Unit Charter Renewal envelope. Submit the following materials to the Bay-Lakes Council by **30 days prior to Unit expiration**:

- Signed copy of the *Electronic Recharter Report* (Step 11)
 - The floppy disk with the unit charter renewal information (Step 17)
 - Completed and signed Quality Unit Application
 - Any new youth or adult applications.
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