



Unit Commitment Tracker Instructions

Part I: Trail's End Sales Manager Instructions

1. Change the sales cycle to the **2017-2018 Fundraising Sales Cycle**.
2. Click the **Campaigns** tab in the respective Council view.
3. Click the **Add Campaign** button.
4. Add the description (Fall 2017), start date, and end date, then click **Update**.

Michigan Crossroads Council

DETAIL DISTRICTS CONTACTS **CAMPAIGNS** ORDER TYPES INVENTORY PRODUCTS DELIVERY LOCATIONS COMMISSIONS UNIT ORDERS COUNCIL ORDERS UNIT PAYMENTS

Add Campaign

Description	Start Date	End Date	Actions
Fall 2017	3/14/2017	12/31/2017	Update

Part II: Council Instructions

The unit commitment tracker has two main functionalities: the **optional** ability to send and manage pre-made marketing emails to an uploaded list of recipients (See Appendix A for email examples) with a link to your Councils registration page, and a direct link to your Council's registration page if you do not use the pre-made emails.

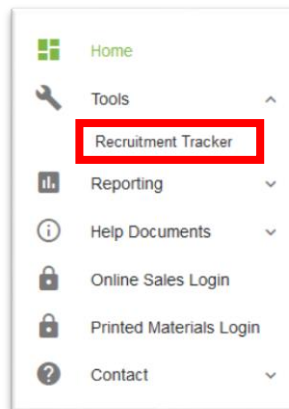


Unit Commitment Tracker Instructions

1. Change the sales cycle to the **2017-2018 Fundraising Sales Cycle**, and select the **Fall 2017** Campaign.

2017-2018 Fundraising Cycle Fall 2017 Michigan Crossroads - Leader

2. In the sidebar, select **Tools** and then click **Recruitment Tracker**.



3. Ensure the **Fall 2017** campaign is showing in the dropdown.

Unit Recruitment Tracker

Fall 2017

Step 1: Select Recipients to Invite

[Download CSV Template](#)

Select files...

[Manage Recipient List](#)

Step 2: Start Your Commitment Email Campaign

The first email will send when the "Start Email Campaign" button is clicked

[Start Email Campaign](#)

Step 3: Track and Manage Your Emails

Emails automatically schedule one week apart – dates auto-fill based on the campaign initiation date

Email Subject

Fund Your Ideal Year of Scouting
Ten Steps to a Successful Popcorn Sale
Grow Your Sale with Online Selling
Trail's End Scholarship – A Life Changing Incentive

[Track and Manage Emails](#)

[Download Template](#)
[Download Template](#)
[Download Template](#)
[Download Template](#)

Step 4: Add Additional Recipients as Needed

Single User Invite

First Name

Last Name

Email

[Add Email](#)

Step 5: Track Registered Units

[View Unit Registrations](#)

Alternate Method

If not using the commitment email campaign, share the link below with your units to register for the Popcorn Sale!

<http://scouting.trails-end.com/tools/recruit/signup?council=c3e30ffc-f21c-11e5-a5eb-0532e19f>



Unit Commitment Tracker Instructions

Initiating the Marketing Email Campaign

1. Click the **Download CSV Template** hyperlink to download, and add the First Name, Last Name, and Email Addresses of all your intended recipients.

Fall 2017

Step 1: Select Recipients to Invite

[Download CSV Template](#) ←

Select files...

[Manage Recipient List](#)

	A	B	C
1	First_Name	Last_Name	Email_Address
2			
3			
4			
5			
6			
7			
8			

2. Once all information has been added, save the file as a **CSV (Comma delimited)** to your desktop (or other file location of your choice).

File name: Copy of recipient_email_template

Save as type: CSV (Comma delimited)



Unit Commitment Tracker Instructions

- Once saved, click the **Select files** button, and select the file you want to upload. When the file name shows above the Upload files button, click the **Upload files** button. The file name will turn green with a successful upload.

Fall 2017

Step 1: Select Recipients to Invite

[Download CSV Template](#)

Select files...	←
Test Upload File.csv	
Upload files	←

[Manage Recipient List](#)

- Once you get the green success notification, click the **Manage Recipient List** hyperlink to view the records you've uploaded.
- The Recruit List screen allows you to track and manage the process of sending the pre-made emails. If all records look correct, click the **Back** button.

Recruit List

<input type="checkbox"/> Select All	First Name	Last Name	Email Address	Status Code	EMAIL 1	EMAIL 2	EMAIL 3
<input type="checkbox"/>	Test	Test	Test@test.com	Active			

[Stop Email](#) [Resume Email](#) [Back](#)

- When ready to begin the four part email series, click the **Start Email Campaign** button. Emails are triggered to send at 9pm EST. When starting the email campaign, the first email will send the same day, and each consecutive email will send seven days apart.

Step 2: Start Your Commitment Email Campaign

The first email will send when the "Start Email Campaign" button is clicked

[Start Email Campaign](#)

- To track and manage the sending process of the campaign emails, click the **Track and Manage Emails** button.



Unit Commitment Tracker Instructions

Step 3: Track and Manage Your Emails

Emails automatically schedule one week apart – dates auto-fill based on the campaign initiation date

Email Subject

Fund Your Ideal Year of Scouting
Ten Steps to a Successful Popcorn Sale
Grow Your Sale with Online Selling
Trail's End Scholarship – A Life Changing Incentive

[Download Template](#)
[Download Template](#)
[Download Template](#)
[Download Template](#)

[Track and Manage Emails](#)

- The user list in process of receiving the emails will show a Status Code of Active. A date will appear in each record after each email that is sent. To stop or resume email sends, click the checkbox next to any or all of the records and click either the **Stop Emails** or **Resume Emails** buttons.

Recruit List

<input type="checkbox"/> Select All	First Name	Last Name	Email Address	Status Code	EMAIL 1	EMAIL 2	EMAIL 3
<input type="checkbox"/>	Stuart	Alexander	stuart.alexander@popweav...	Active	2017-03-14		
<input type="checkbox"/>	Test1	Test1	test1@test.com	Stopped			
<input type="checkbox"/>	Test	User	test.user@test.com	Active	2017-03-14		

[Stop Emails](#) [Resume Emails](#) [Back](#)

- To add additional recipients to the email list after the email campaign has been initialized, use the Single User Invite functionality to add individual recipients by entering the First Name, Last Name, and Email address. Once entered, click the **Add Email** button, and they user will start receiving the four part email series.

Step 4: Add Additional Recipients as Needed

Single User Invite

First Name

Last Name

Email

[Add Email](#)



Unit Commitment Tracker Instructions

- Each email received has a button for recipients to click that says **Register Today**. When the link is clicked, recipients are taken to a registration form. First, users must select their District and Unit from the dropdown menus. Once those dropdowns are selected, additional questions outlined in red below will appear. Users must complete the Kernel Information (required), and answer all questions in order to submit the registration form. There are optional fields for users to add information for a Co-Kernel. Once completed, users must click the **Submit button**.

Registration Form

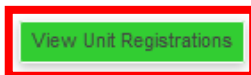
1 Bay Trails District Pack 115

Kernel Information (Required)		Kernel Information (Optional)	
First Name	Last Name	First Name	Last Name
Email	Phone	Email	Phone
Address		Address	
City	State	City	State
Zip	Country	Zip	Country
Do you have an account in the Trail's End Popcorn System?	No	Do you have an account in the Trail's End Popcorn System?	Choose
How many years have you been a Kernel?	Years	How many years have you been a Kernel?	Years
Planned Selling Methods		Sale Information	
Check all that apply		Has your unit sold popcorn before?	No
<input type="checkbox"/> Show N Sell (Storefront Sales)		How many youth are in your unit?	Youth
<input type="checkbox"/> Show N Deliver		What is your unit's sales goal for the fundraiser?	Goal
<input type="checkbox"/> Take Order		Is your unit planning to have a popcorn kickoff?	No
<input type="checkbox"/> Online			

Submit

- As kernels register for the popcorn sale, the registrations will appear in the Recruit List screen. To get to the Recruit List, click the **View Unit Registrations** button.

Step 5: Track Registered Units



- As the Council admin, you have the ability to edit a kernels registration details. For instance, there is an option for kernels to select "Can't find my unit" during registration. Once you added or determined their correct unit, click the **Edit** button to not only change their unit affiliation, but also



Unit Commitment Tracker Instructions

change any of their user details. Once finished editing, click the **Submit** button.

Recruit List

District	Registered Unit	Leader Name	Leader Email	Type	Existing Leader	Actions
1 Bay Trails District	Pack 103	Test Test	Test@test.com	Kernel	No	Edit Create

Edit Kernel

1 Bay Trails District Pack 103

First Name: Test Last Name: Test

Email: Test@test.com Phone: 111-111-1111

Address: 1

City: 1 State: Indiana

Zip: 11111 Country: US

Submit Cancel

13. During the registration process, kernels are asked if they have an existing account in the Popcorn System. If yes, they are prompted to enter their username. If no, the Create button will appear next to their registration record. By clicking the **Create** button, a window will appear to enter a username and password for the kernel. When you hit submit, it will create an account for the kernel in the Popcorn System, and give them a role in the unit in which they registered.

Recruit List

District	Registered Unit	Leader Name	Leader Email	Type	Existing Leader	Actions
1 Bay Trails District	Pack 103	Test Test	Test@test.com	Kernel	No	Edit Create

Create User

User Name ✓

Password

Confirm Password

Submit Cancel



Unit Commitment Tracker Instructions

14. If a user supplies their username on the registration form, and they already have a role in the unit in which they registered, the screen will show **Done** next to the registration record. If they have an account in the Popcorn System, but do not have a role in the unit for which they registered, an **Add Role** button will appear in place of the Create button. By clicking the **Add Role** button, you will add that role to the kernels existing account.

Part III: Alternate Method

To use the Unit Commitment Tracker, it is not required that you use the marketing email campaign functionality. On the main registration page, there is a direct link that can be copied and pasted. This link takes kernels to the same registration page as the marketing emails. This link is specific to your Council and the Council campaign selected in the page dropdown (ie. Fall 2017). This link can be used in your own marketing emails, or placed on your website for unit registration.

Alternate Method

If not using the commitment email campaign, share the link below with your units to register for the Popcorn Sale!

<http://scouting.trails-end.com/tools/recruit/signup?council=c3e30ffc-f21c-11e5-a5eb-0632e1>



Unit Commitment Tracker Instructions

Appendix A: Emails

Email 1: Fund Your Ideal Year of Scouting



Hello Brandon,

Thank you for volunteering your time & talents in Scouting. The benefits offered to the youth of today through Scouting programs & your efforts are many; however, maximizing those benefits takes planning, time, & financial resources.

Although some families can readily fund their own Scouting adventures, there are many that cannot. Using the Ideal Year of Scouting model, you can ensure that all current & future Scouts in your program have the chance to experience all the great things Scouting has to offer.



Register your Unit for the popcorn sale!

[Register Now](#)

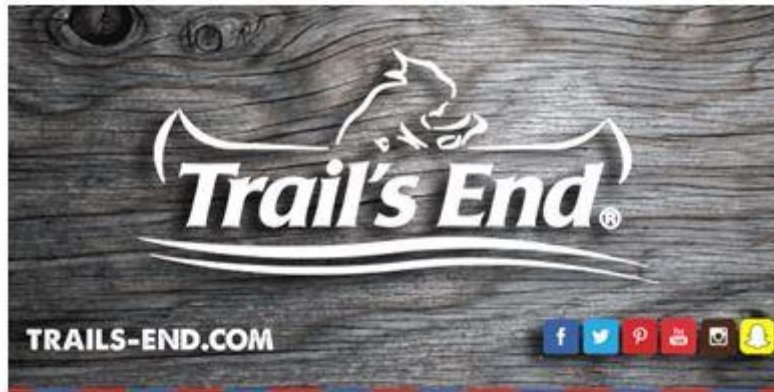




Unit Commitment Tracker Instructions

Email 2: Ten Steps to a Successful Popcorn Sale

To view this email as a web page, go [here](#).



Hello Brandon,

We know that the popcorn sale can help Units like yours fund their Ideal Year of Scouting. Follow these ten steps to have a successful popcorn fundraiser:



1. Determine your Unit & Scout sales goals based on your annual budget
2. Host an awesome popcorn kick-off party to get Scouts & parents excited
3. Think of fun Unit incentives to keep Scouts engaged
4. Get Scouts to create a personalized selling webpage on [Trails-End.com](https://trails-end.com) to earn incremental sales from friends & family
5. Schedule & sell in front of stores & high traffic areas
6. Supply order forms & product to Scouts for selling door-to-door
7. Check your popcorn inventory often
8. Check-in weekly with Scouts & parents on their sales progress
9. Reach your goal & fund your Unit's entire year of Scouting
10. Celebrate with a year-end party

Register your Unit for the popcorn sale!

[Register Now](#)



Unit Commitment Tracker Instructions

Email 3: Grow Your Sale with Online Selling



Hello Stuart,

Does your Unit want to **Raise More Money in Less Time with Less Effort?** Did you know that selling online...

Is much easier & less of a commitment

- No product to deliver
- No money to collect
- Less of a commitment
- Ability to reach more consumers



Returns more money to Scouting

- Units receive up to 50% of online sales
- Scouts receive 5% of online sales, over \$300, on an Amazon gift card



Has a higher average order value

- 2016 online average order value was \$62 compared to:
 - 2016 face-to-face average order value: \$18
 - 2015 online average order value: \$44



Selling online is easier than ever & is a great option for your Scouts to earn incremental sales by sharing their webpages with friends & family across the country. Scouts that register online accounts can sell new & exciting products all year. It's as easy as 1-2-3!

Step 1: Scouts visit Trails-End.com & click the "Register" button to create an account

Step 2: Scouts create a personalized selling webpage by writing a brief bio about their Scouting experience, setting a goal, uploading photos/videos & choosing a favorite product

Step 3: Finally, Scouts share their webpage with friends & family via email, social media & text message



Click the button below to register your Unit for the popcorn sale or let your Council know that your Unit will be selling online.

Register Now



Unit Commitment Tracker Instructions

Email 4: Trail's End Scholarship – A Life Changing Incentive



Hello Brandon,

Did you know that Trail's End offers Scouts a Scholarship Program? Scouts who sell at least **\$2,500** (online, face-to-face, or combination) in any calendar year receive **6%** of their total sales invested in their own college scholarship account. Once enrolled, 6% of their sales each year will be added to their account. Scouts only have to hit the \$2,500 minimum one time!



When the Scout is ready to attend college, they can submit for payout of the account & Trail's End will send the funds directly to their educational institution to offset tuition, books, housing and/or other fees.

This is one of the many great benefits available to Scouts who participate in the popcorn sale.

Register your Unit for the popcorn sale today!

[Register Now](#)