How do I …

invite parents to OSM?

OSM (Online Scout Manager) is crucial to our information gathering so we can safely run activities for our Scouts at all levels. It is therefore important that parents can access it to update information about their child as well as receive information from you.

You can invite parents to the Parent Portal if they are in your waiting list, have been transferred to your section or if you have manually added them to your group/section.

For this example, we will assume that the parents have registered their child on your Group's waiting list and they have been transferred to your section.

1. Log in to OSM
2. If you haven't sent emails from OSM before, select Settings – the cog (just above the log out button at the bottom of the left side menu.
   a. Select Parent Portal Settings
   b. Select Email
   c. Enter an email address to send your emails from (Email from address)
      i. this is the address any replies will go to
      ii. It should be a Scout email address (not your personal email) and can be your section email or your Scout email. E.g. wolf@1stchestnut.org.uk or john.llama@1stchestnut.org.uk
   d. Enter your name (Name emails sent from)
   e. You may choose who receives emails – suggest you select all 3 options
      i. Primary Contact 1
      ii. Primary Contact 2
      iii. Member
   f. Choose who else should get a copy of your emails; this may be your section email address (Send copies to)
3. From the Section/Area (top of the left menu) select your Section
4. Select Members (below your section)
5. Select Personal Details from the drop down menu
   a. You should be seeing your Section in Picture View
   b. If not, click on Display (under the text Personal Details)
   c. Hover over Display view
   d. Select Picture view
6. Select all the young people whose parents you want to invite to the OSM Parent Portal (tick the box top left of each picture)
7. From the new tabs that appear (under the text Personal Details) select Send Email
8. You may choose to create a template that you can use in future, or just write a one off email. See below (#14) for how to create a template. But, for now:
9. Enter a subject e.g. Welcome to (your section name) at (your group name)
10. Personalise your email –
    a. Dear
    b. From Mail Merge menu select Member's first name

If there is something you don't understand or don't know how to do, **ASK!**
Ask your line manager (i.e. section leaders > GSL; GSLs > DC). If they don't know, they know someone who does!

11. Start to write your email and, at an appropriate point, from Parent Portal Invitations drop down, select Personal Details to add the link.
12. This is an example of something you may write:

Dear [FIRSTNAME],

You are invited to log into OSM and add information about your child. This link [DETAILS] will allow you to create an account and log in. The page that first opens will be so you can add information about your child. From this page you can then access other information we have posted.

The personal information we collect is needed so we are able to deliver great activities whilst keeping your child safe. The more information you provide the better job we can do! It will be shared within the section and by the Group Lead Volunteer. We will only share this with other people/bodies if we are required to by law or if we need to in order to ensure the safety of your child. By enrolling your child in Scouts you give us permission to do so.

There are a couple of guides [here](#) (look for 'Guides for Parents') that you may find useful:
- *How do I join OSM?*
- *How do I use OSM on my phone or tablet*

Kind regards,
John
Wolf Section Leader, 1st Chestnut Scout Group

13. Check all is well (spelling, grammar) and SEND
    a. The email will go to all the contacts of the recipients you have chosen.

Creating an email template
14. Following on from #7 above
15. From Templates & Drafts select Templates
16. Select Edit Template
17. On the right, choose + CREATE TEMPLATE
    a. New Template pops-up
18. Give it a name – up to 30 characters; e.g. Parent invitation
19. Choose a template style (can be just text)
20. Create
21. Click by the C of Click to edit and enter your text in the box
22. This is when you add the links (see #10 and #11 above)
23. You can add columns (rows on a mobile) or pictures to your email if you like
24. When you have finished, your new template will be saved automatically
25. Close the tab you are working on (Parent invitation) and the tab Newsletter Templates

Sending an email using a template
26. Following from #6 above …
27. Select Send Email
28. Select Templates and Drafts
29. Select Templates
30. Click on the template you want to use (/have just created)
31. Check it's all correct and SEND