



Portalbuzz

Adding a new club member (not already in database)

1. Login to Portalbuzz as a Regional Administrator.
2. On navigation bar on left, choose Admin, then Headquarters management screen.

Portalbuzz Administration

Below are the administrative functions which you have access to. Click the "Select" button to the right of the name to access the selected function.

Members

Add/edit/delete members (Administrator, Secretary, Users Administrator)
Make changes to your member roster Select

General administration

Headquarters management screen (Headquarters Administrator)
Manage users, clubs, officers etc. Select

Officers (Administrator, Secretary, Users Administrator)
Add, edit, delete club officers for the current and upcoming year. Select

3. Select "Add new member".

Australia Management

Current view: HQ Management

Search
(members, clubs, manage officers or clubs) Select

Add new member
(for people not in database) Select

Change log
(tracks the changes for membership, officers, and invoices) Select

- Under "Organization unit", enter the first few letters of the club to which the member should be added, select it from the list that appears, then click "Add".

The screenshot shows the 'Australia Management' interface. A sidebar on the left contains icons for 'Me', 'Members', and 'Admin'. The main area displays 'Current view: HQ Management'. A modal dialog box titled 'Add new member' is open, featuring a 'Join date' field with the value '3-February-2016' and a calendar icon, and an empty 'Organization unit' text field. At the bottom of the dialog are 'Add' and 'Cancel' buttons. In the background, a table with 'Select' buttons is partially visible.

- Enter the member's email address and click "Lookup". If the member does not have an email address, click "Member does not have an email address".

The screenshot shows the 'Email' input field in the 'Add new member' dialog. The field is empty. To the right of the field is a blue icon of a person with a question mark and the text 'Member does not have an email address'. Below the field are 'Lookup' and 'Cancel' buttons. The sidebar on the left shows 'Me', 'Members', and 'Admin' options.

6. Complete the member's details and click "Save".

The screenshot displays a web browser window with the URL <https://members.portalbuzz.com/Member/User/Create?DestinationOrgUnitId=30128&JoinDate=1454025600000&MemberTypeId=0&ReturnUrl=%2fMember%2f>. The page title is "Add new member". A red banner at the top of the form area reads "admin access - add a new member to the organization".

The form is titled "Main information" and contains the following fields:

- Courtesy title:
- Gender:
- First name:
- Birthday:
- Middle initial:
- Sponsor:
- Last name:
- Time zone:
- Suffix:
- Join date:
- Nickname:

The left sidebar contains navigation icons for: Me, Members, Calendar, Meetings & events, Committees, Email, Documents, and Newsletters. The top right navigation bar includes "James Olie", "Club site", "Help", and "Sign Out". The Windows taskbar at the bottom shows the time as 10:55 on 29/01/2016.