



# Portalbuzz

## Deleting a club member

1. 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

2. Select "Search".

**Australia Management**

Current view: HQ Management

**Search**  
(members, clubs, manage officers of clubs) Select

**Add new member**  
(for people not in database) Select

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

3. Click "New Search".

**Organization search**  
Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for  
OUType: District  Save as private Save as public

Record count  
4

Your options  
 Export to Excel  New search ←

club name	officers submitted	club status	
Central	1/1	Active	actions
Members at Large	0/1	Active	actions
North Central	1/1	Active	actions
Southern	1/1	Active	actions

4. Switch the Members/Clubs tab to "Members". The darker tab is the selected one.

**Organization search**  
Current view: [HQ Management](#) > [Search](#)

**Members** Clubs

Available search terms

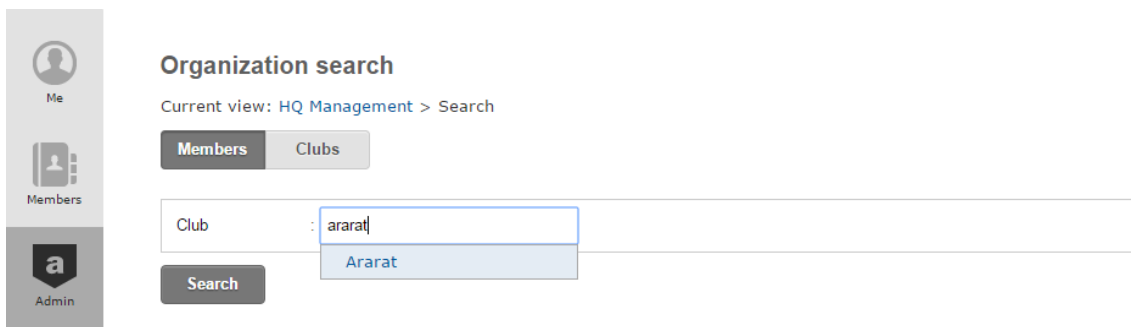
- Drop down the list to see the available search terms (this is not necessary to do the search but will help you familiarise yourself with the available functions).

The screenshot shows the 'Organization search' page. On the left is a vertical navigation bar with icons for 'Me', 'Members', and 'Admin'. The main content area has the title 'Organization search' and the text 'Current view: HQ Management > Search'. Below this are two tabs: 'Members' (selected) and 'Clubs'. A search input field is empty, and a 'Search' button is below it. A blue oval highlights the 'Available search terms' section, which lists the following search criteria: FullName: <last, first>; LastName: <last name>; FirstName: <first name>; Club: <club name>; District: <district name>; Officer: <All, President Elect, President, Community Service ASD, etc>; Year: <all, current, upcoming, 2016, 2015, 2014, etc>; Committee: <active committees>; MemberStatus: <current, former, current and former>; BillingCode: <code or name or None>; EffectiveStart: <m/d/yyyy>; EffectiveEnd: <m/d/yyyy>; DeletionReason: <lack of time, lack of interest, business pressure, other, etc>

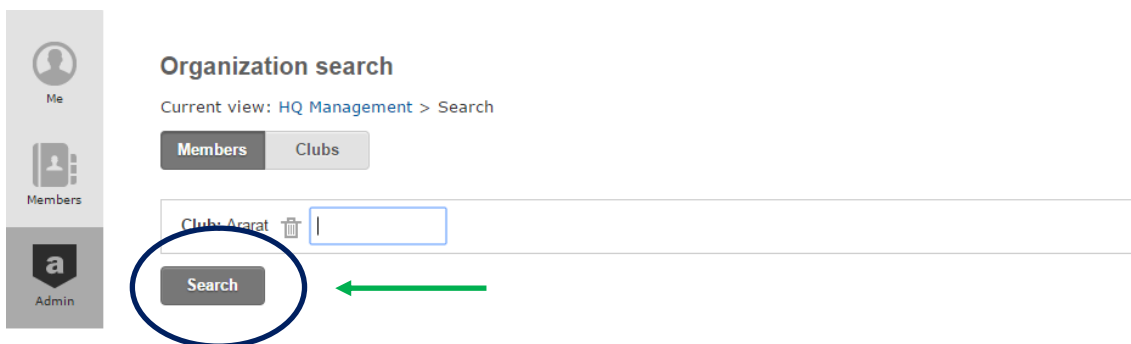
- In the first field, key in "Club".

This screenshot shows the same 'Organization search' page as above, but with the search input field containing the letter 'c'. A dropdown menu is open over the field, listing the following search terms: Club, District, Officer, and Committee. The 'Available search terms' list is visible below the dropdown, showing the same list of search criteria as in the previous screenshot.

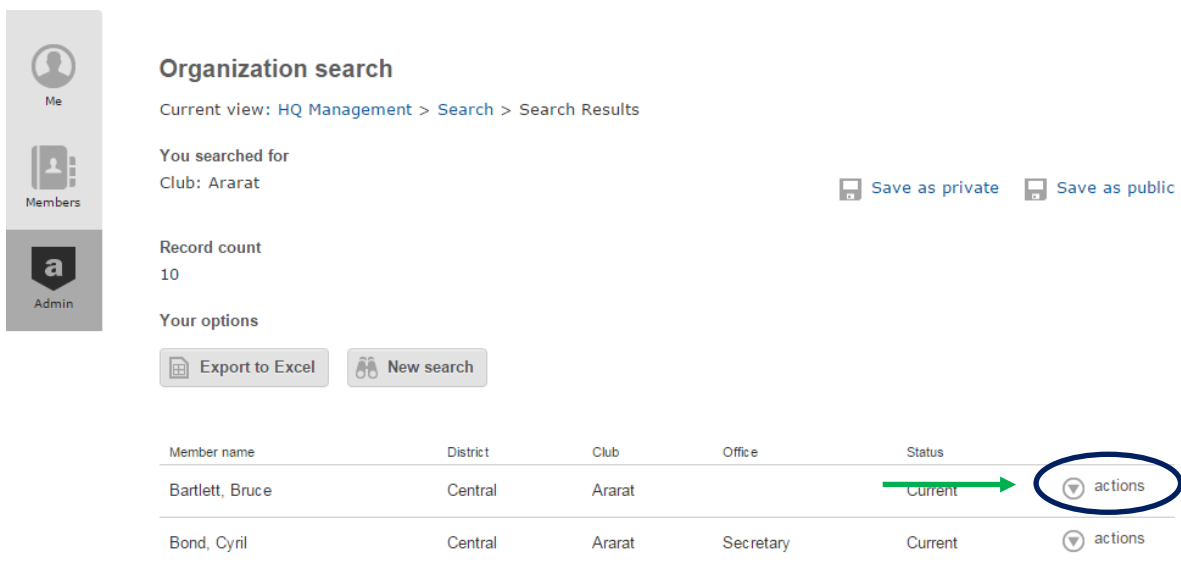
7. In the second field, key in the name of the club from which you are deleting the member(s).



8. Then click "Search".



9. Next to the member(s) you wish to delete, click "actions".



10. From the drop-down list, choose delete.

Member name	District	Club	Office	Status	
Bartlett, Bruce	Central	Ararat		Current	actions
Bond, Cyril	Central	Ararat	Secretary	Current	view edit changes log add to new club delete
Chaplin, Daryl	Central	Ararat		Current	
Cosgriff, Tony	Central	Ararat	Treasurer	Current	
Gladiss, John	Central	Ararat		Current	
Hurstfield, David	Central	Ararat	President	Current	actions

11. Select the date the club member left the club (if known, otherwise leave as today's date) and choose a reason for deletion. Click "Delete".

**Delete member**

You are removing Bruce Bartlett from Ararat

Deletion date  
3-February-2016

Reason  
Attendance

Delete Cancel

12. If other members should be deleted from this club, go back to **Step 9** and continue the process.

If you should delete members from other clubs, click "New Search" and go back to **Step 4**.

**Organization search**

Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for  
Club: Ararat

Record count  
10

Your options  
Export to Excel **New search**

Member name	District	Club	Office	Status	
Bartlett, Bruce	Central	Ararat		Current	actions
Bond, Cyril	Central	Ararat	Secretary	Current	actions