



Portalbuzz

Adding Club Officers

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 "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

4. 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

5. 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).

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

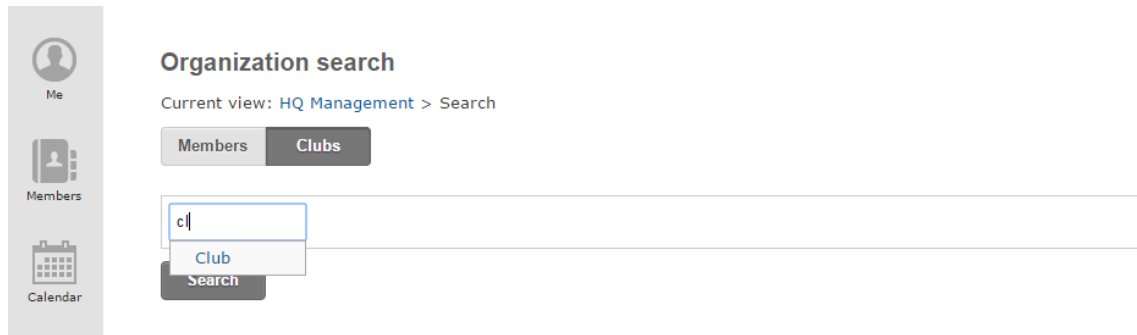
Members **Clubs**

Search

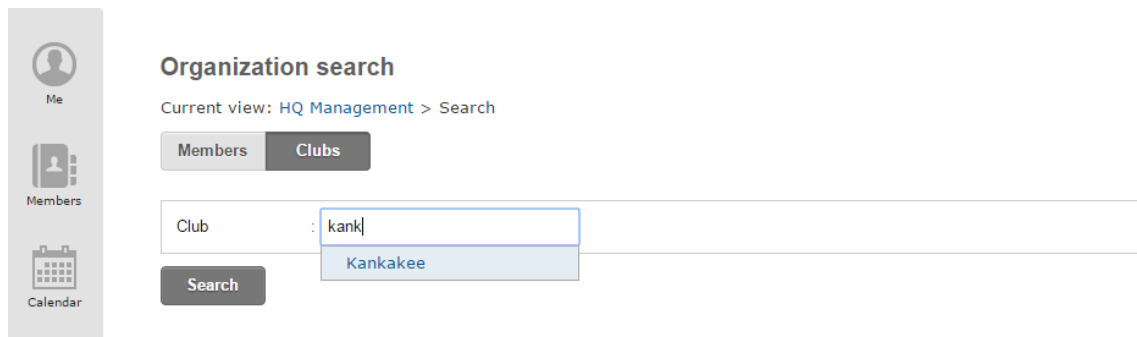
Available search terms

- Report: <change in membership>
- Club: <club name>
- District: <district name>
- OUType: <district, club, region>
- Status: <active, inactive>
- StartDate: <m/d/yyyy>
- EndDate: <m/d/yyyy>

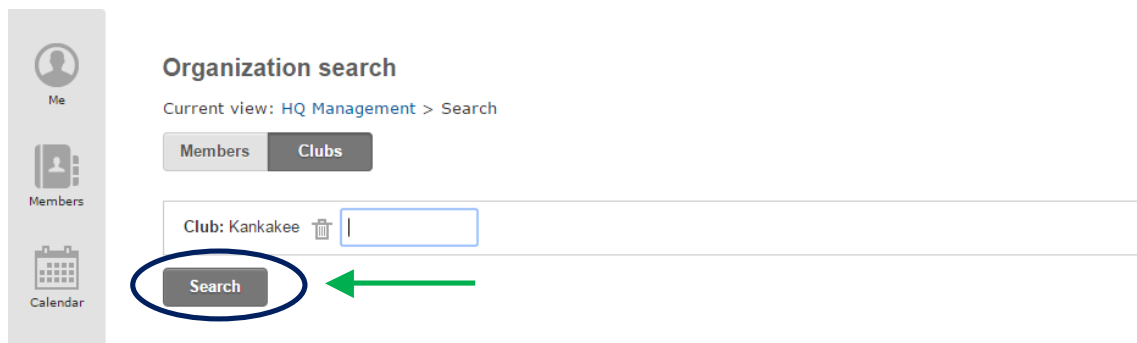
6. In the first field, key in "Club".



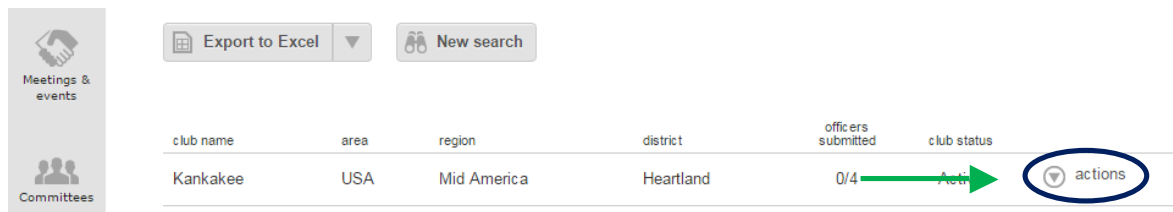
7. In the second field, key in the first few letters of the club that you are adding the officers and select it from the list that appears.



8. Then click "Search".



9. Next to the club you wish to add the officers, click "actions".



10. From the drop-down list, choose edit officers.

The screenshot shows a web application interface with a sidebar on the left containing icons for Meetings & events, Committees, Email, and Documents. The main area features a table with columns: club name, area, region, district, officers submitted, club status, and actions. The table contains one row for 'Kankakee' with values: USA, Mid America, Heartland, 0/4, Active. A green arrow points to the 'actions' dropdown menu for the 'Kankakee' row, which is open and shows options: view members, edit, edit member UDF, edit officers (circled in blue), and change status.

club name	area	region	district	officers submitted	club status	actions
Kankakee	USA	Mid America	Heartland	0/4	Active	<ul style="list-style-type: none">view memberseditedit member UDFedit officerschange status

11. Choose the appropriate year and then click "Create officer".

The screenshot shows a dialog box titled 'Kankakee' with a dropdown menu set to '2015 - 2016'. Below the dropdown are two buttons: 'Manage mandatory positions' and 'Create officer' (circled in blue). A green arrow points to the 'Create officer' button. Below the buttons, it says 'There are no officers defined yet'. A 'Close' button is at the bottom right.

12. Type the name of the person to be appointed and then select the position from the dropdown menu, then click "Save".

The screenshot shows a dialog box titled 'Create officer' with two input fields: 'Member' (a text box) and 'Position' (a dropdown menu set to 'President'). At the bottom are 'Save' and 'Cancel' buttons.

13. If there are other officers to be appointed to that club, go back to **Step 10** and continue until all officers are entered.

To enter officers for a new club, go back to **Step 3**.