



Portalbuzz

Exporting a contact list to Excel

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

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

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

Members Clubs

Search

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).

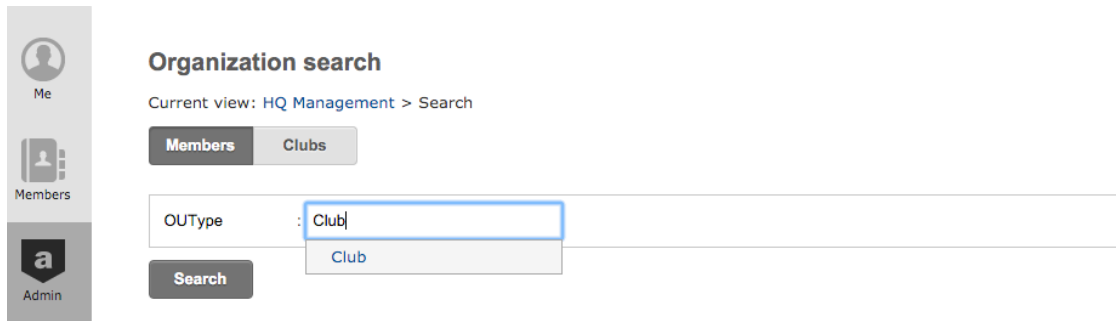
The screenshot shows the 'Organization search' page. On the left is a vertical navigation bar with 'Me', 'Members', and 'Admin' options. The main content area has a title 'Organization search' and a breadcrumb 'Current view: HQ Management > Search'. Below this are two tabs: 'Members' (selected) and 'Clubs'. A large empty search input field is present, with a 'Search' button below it. A blue oval highlights a section titled 'Available search terms' with a dropdown arrow. This section lists various search criteria and their possible values:

- FullName: <last, first>
- LastName: <last name>
- FirstName: <first name>
- Club: <club name>
- District: <district name>
- OUType: <club, district, region>
- Officer: <All, Area President Elect, ASD - Brotherhood Fund, Area President, 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: <deceased, business pressure, other, attendance, etc>

- In the first field, key in "OUType" (OU stands for Organization Unit – i.e. club, District, Region, Area).

This screenshot shows the same 'Organization search' page as above, but with the search input field containing the text 'OUType'. A dropdown menu is open below the input field, showing 'OUType' as a selected option. The 'Search' button is visible below the dropdown.

8. In the second field, key in “club”.



Organization search

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

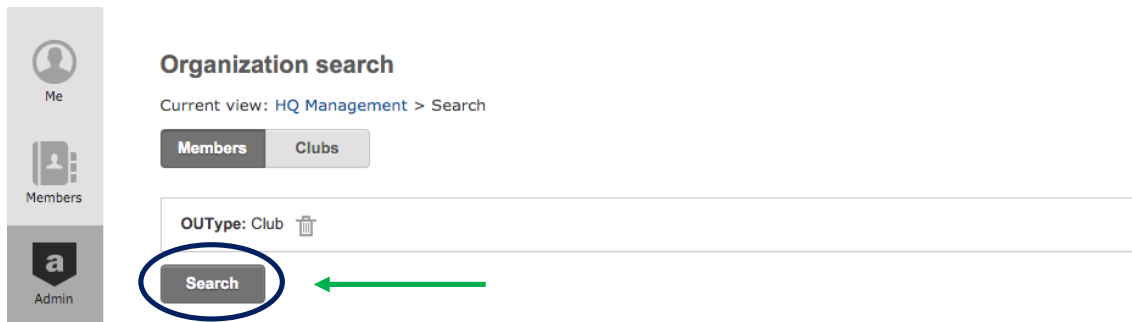
Members Clubs

OUType : Club

Search

Optionally, you can also enter member status to see current, former, or current and former members (see available search terms). By default, current members are generated.

9. Now click “search”.



Organization search

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

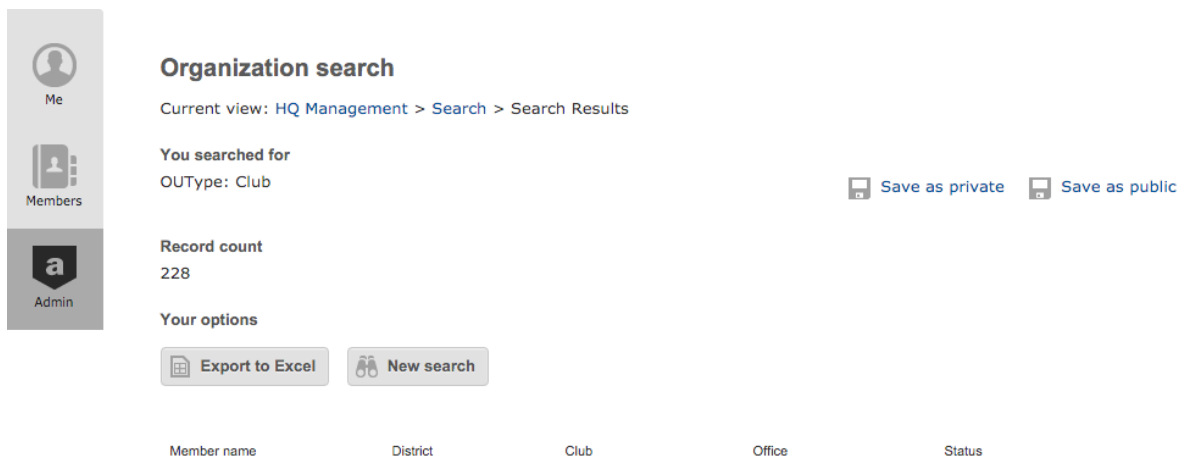
Members Clubs

OUType: Club

Search

10. On the next page you will see all members listed in alphabetical order (not shown in example).

Click “Export to Excel” to open full details in a spreadsheet.



Organization search

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

You searched for
OUType: Club

Record count
228

Your options

Export to Excel New search

Member name District Club Office Status