



Portalbuzz

Modifying a club member's details

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

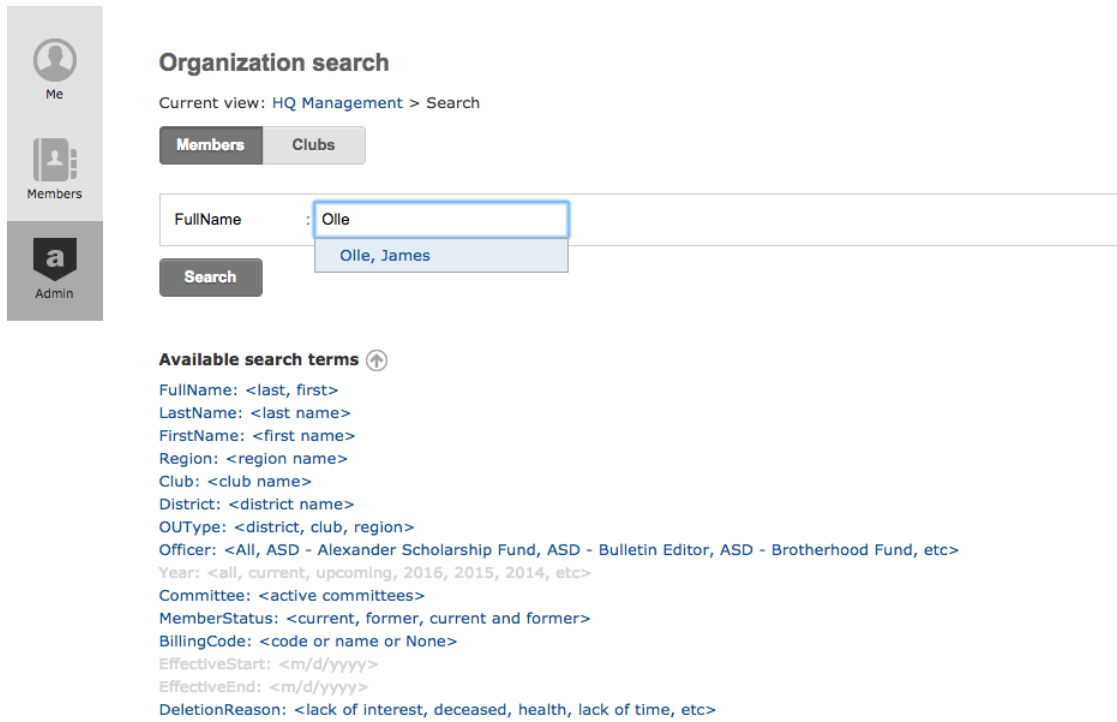
5. Drop down the list to see the available search terms (this is not necessary to do the search but will help you familiarise yourself with the available functions).

The screenshot shows the 'Organization search' page. On the left is a navigation sidebar with 'Me', 'Members', and 'Admin' options. The main content area has a title 'Organization search', a breadcrumb 'Current view: HQ Management > Search', and two tabs: 'Members' (selected) and 'Clubs'. Below the tabs is a large empty search input field and a 'Search' button. A blue circle highlights the 'Available search terms' section, which lists various search criteria with their respective syntax: 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>, and DeletionReason: <lack of time, lack of interest, business pressure, other, etc>.

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

This screenshot shows the same 'Organization search' page as above, but with the search input field containing the text 'FullName'. A dropdown menu is visible below the input field, showing 'FullName' as the selected option. The 'Search' button is now highlighted. The 'Available search terms' list is visible below the search field, showing a slightly updated list of search criteria including 'Region: <region name>' and 'OUType: <region, club, district>'. The sidebar and navigation elements remain the same.

- In the second field, key in the surname of the member whose record you wish to modify and click on the required name once it appears in the list.



Organization search

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

Members **Clubs**

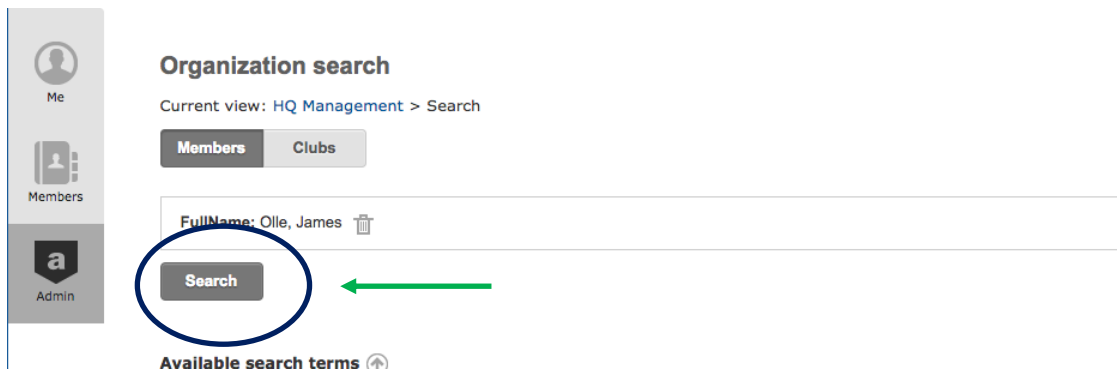
FullName :

Search Olle, James

Available search terms ↑

- FullName: <last, first>
- LastName: <last name>
- FirstName: <first name>
- Region: <region name>
- Club: <club name>
- District: <district name>
- OUType: <district, club, region>
- Officer: <All, ASD - Alexander Scholarship Fund, ASD - Bulletin Editor, ASD - Brotherhood Fund, 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 interest, deceased, health, lack of time, etc>


- Then click "Search".



Organization search

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

Members **Clubs**



FullName: Olle, James 

Search ←

Available search terms ↑

9. Next to the member(s) you wish to modify, click “actions”. There may be two or more lines if the club member is in two clubs or holds District/Region/Area/International positions. It does not matter which “actions” link you choose.

[Export to Excel](#) [New search](#)

Member name	District	Club	Office	Status	
Olle, James			Regional Portalbuzz Administrator	Current	
	Test District	Test Club	Secretary	Current	

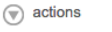

10. From the drop-down list, choose edit.

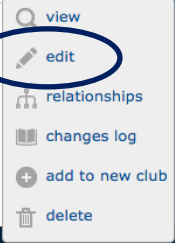
Organization search
Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for
FullName: Olle, James [Save as private](#) [Save as public](#)

Record count
2

Your options
[Export to Excel](#) [New search](#)

Member name	District	Club	Office	Status	
Olle, James			Regional Portalbuzz Administrator	Current	
	Test District	Test Club	Secretary	Current	


view
edit
relationships
changes log
add to new club
delete

11. Modify the necessary fields, then click “Save” at bottom of the page (to exit without making changes, click “Cancel”).

Spouse/Partner Information

Name

Anniversary



Birthday



Child Information

Name

Birth date

Grade

Personal interests



Save

Cancel

