

BUSINESS PROFESSIONALS of AMERICA Giving Purpose to Potential

Membership Registration System

Chapter Advisor

User Manual





register.bpa.org

Important MRS Notes

- <u>Google Chrome</u> is the recommended web browser for optimal performance.
- Any data fields outlined in **RED** are required.
- The BPA Membership Registration System is hosted and managed by DLG Enterprises, Inc.
- For assistance contact Mark Burch, Director of Member Services at <u>mburch@bpa.org</u>.

Login Instructions

Advisor Login	Important Notes
Chapter ID / Membership ID / Email / Username:	If you serve as the local advisor for multiple membership divisions and
Membership ID	have multiple logins, <u>you MUST use</u>
Password:	your login credentials associated with your Secondary Division.
Password	For brand new advisors, you will use
Login	the membership system auto
Forgot Password	were sent to you via email.

- 1. Visit: register.bpa.org.
- 2. Your previous login credentials (from **registermychapter.com/bpamem**) will allow you to access the system initially.
- 3. Enter your "Username" in the "Chapter ID / Membership ID / Email / Username" field.
- 4. Enter your "Password" in the "Password" field.
- 5. Click on the "**Login**" Button
- 6. If you were able to login successfully jump to page three (3).
- 7. For additional login assistance jump to page two (2).



Forgot Password Feature

Advisor Login

Chapter ID / Membership ID / Email / Username:	
Membership ID	
Password:	
Password	
Login	
Forgot Password	
Click on "Forgot Password"	

Enter All The Information Below To Have Your Password Reset and Emailed To You

Back	
Chapter ID / User Name:	<u>Notes</u>
User Name	If an account is found that
Email:	matches the Username and
Email	receive an automated email
Reset My Password	with your new temporary password.
1. Enter your " Username " in the " Username " field.	If no account is found contact

- 2. Enter your "Email Address" in the "Email" field.
- 3. Click on the "Reset My Password" Button.

If no account is found contact National BPA at: bpamembership@bpa.org	
password.	
with your new temporary	
receive an automated email	
Email Address on file, you will	



Login Instructions Continued

When logging into the system for the first time, you will be asked to update / confirm User Information. You may also be prompted to change your "**Password**."

User Information				
Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
Mr.	~	Middle Name		Select ~
Office Phone:		Extension:	Fax Number:	
Office Phone		Extension	Fax Number	
Email:		Alternate Email:	Cell Phone:	
		Alternate Email	Cell Phone	
LinkedIn Link:				
LinkedIn Link				
New Password:				
New Password				
Principal's Information	<u> </u>			
Save And Logout				Confirm Information

- 1. Click on the "**User Information**" Accordion.
- 2. Confirm or Update "User Information" fields (all fields highlighted in RED are required).
- 3. Type a "New Password" in the "New Password" field.
- 4. Click on the "Principal's Information" Accordion.
- 5. Confirm or Update "Principal's Information" (all fields highlighted in RED are required).
- 6. Click on the "**Addresses**" Accordion.
- 7. Confirm or Update "Address Information" (all fields highlighted in RED are required).
- 8. Click on the "Save And Logout" or "Confirm Information" Button.

Password Requirements:

- Must be at least six (6) characters and include at least one:
- One (1) Uppercase Letter
- One (1) Lowercase Letter
- One (1) Number



Membership System Navigation

Action Buttons: Located throughout the Membership System and when clicked on, these Buttons allow you to perform membership related actions.

Tabs: Located across the main page and groups like information and actions together.

Accordions: Located within a Tab and groups like information and actions together.

Search: When you see a **"Search"** field on a screen, this will allow you to search the information listed in the columns on that screen to filter your data on the screen.

Show Entries: When you see a **"Show Entries"** field on a screen, this will allow you to set the number of entries shown on screen.

Sort Columns: Allows you to sort information shown on the screen by clicking on the column you would like to sort.

Action Buttons

Home Action Button: When you click on the **"Home"** Button, it will return you to the Main Page.

Change My Password Action Button: When you click on the **"Change My Password"** Button, it allows you to change your password.

Logout Action Button: When you click on the "**Logout**" Button, it will log you out of the Membership system.





Membership Information Dashboard Toggle Button

When you click on the "**Membership Information**" Button, it will open a Membership Information Dashboard with various membership information and graphs. When you click on the "**Current**" number or the "**Graph**" links, it will display detailed membership information. If you want to collapse the Membership Information Dashboard, Click on the "**Membership Information**" Button.

Membership Information 🕇		
Membership Date:	Expiration Date: 07/31/2020	Original Join Date: 08/04/2020
		Current
Paid Members		0
Unpaid/Pending Members		0
Paid Advisors		0
Unpaid/Pending Advisors		0
Total Paid		0
Total Unpaid		0
Total Unsubmitted		2
Total Membership		0
Membership Graph		

UVerall Membership Chart

Paid Members: Total Number of Paid Members.

Unpaid/Pending Members: Total Number of Unpaid/Pending Student Members.

Paid Advisors: Total Number of Paid Advisors.

Unpaid/Pending Advisors: Total Number of Unpaid/Pending Advisors.

Total Paid: Total Number of All Paid Members.

Total Unpaid: Total Number of All Unpaid Members.

Total Unsubmitted: Total Number of ALL Unsubmitted Members.

Total Membership: Total Number of ALL Members Paid and Unpaid.

Membership Graphs Available:

- Membership Graph
- Overall Membership Chart

How to View / Print a Membership Graph or Chart:

1. Click on one of the Membership Graphs or Charts and click "Print."



Student Tab and Screens

1. Click on the "Student" Tab.

tudents	Chapter	Information	Chapter Adv	visor(s)	Conferences	Invoice	History	Quick Links	Notifications	State Information	Resources	E-Store Su	urveys Ema	ail
d Student	ts Memb	ership Download	Students V	Vith Access T	o Portal Pr	int Members	nip Cards F	Print Membership	Certificates Pre	evious Year Count Ema	ail All Submit I	Membership		
ot the red	Check for D	Ouplicate Members	outton before	e submitting y	our affiliation.	Please use t	he Select All b	utton or individua	ally select students	to be placed on an invoice	e.			
ect All / E	Deselect All	Delete Selected	Show In	active										
10	✓ entries											Searc	:h:	
us 11	Select ↓↑	Momborship ID J†	Last Name ↓ ₹	First Name ↓	Gender 1	Grade 🕼	Member Title ↓†	Submitted Date	Membership Date	Invoice Number ↓↑ Transci	ripts ↓† Edit	Request Change	Transfer ↓1 History ↓1	Del
us ↓↑ IDING	Select ↓†	ID I1 14-0013-003440	Last Name ↓₹ White	First Name ↓ Anne	Gender ↓↑ Female	Grade ↓↑ 7	Member Title ↓↑ Student Leader 1	Submitted Date 4 06/02/2020	Membership Date	Invoice Number 11 Transco 1245	ripts 🗐 Edit	Request Change	Transfer History ↓↑	Del
us 11 IDING MBER	Select ↓†	ID II 14-0013-003440 14-0013-003437	Last Name ↓₹ White Smith	First Name↓₹AnneJohn	Gender 11 Female Male	Grade ↓↑ 7 7	Member TitleItStudent Leader 1It	Submitted 1 Date 1 06/02/2020 0 06/02/2020 0	Membership Date	Invoice Number 11 Transco 1245 1246	ripts If Edit	Request Change	Transfer History	Del
us Jî IDING MBER	Select 1	ID I1 14-0013-003440 14-0013-003437 14-0013-003438	Last Name ↓₹ White Smith Jones	First Name ↓₹ Anne ↓ John ↓ Sally ↓	Gender 11 Female Male Female	Grade ↓↑ 7 7 8	Member TitleIStudent Leader 1IStudent Leader 1IStudent Leader 2I	Submitted Date 1 06/02/2020 06/02/2020	Membership Date	Invoice Number 11 Transco 1245 1246	ripts 11 Edit	Request Change	Transfer History []	Dele X

Status

- **Pending** = Student Member has been submitted, but the membership invoice has not been Paid.
 - Submitted Student Members can be edited, but **NOT** deleted.
- Member = Student Member has been submitted and the membership invoice has been Paid.
- **Blank** = If the "**Status**" field is blank, the Student Member(s) have not been submitted.
 - Unsubmitted members can be edited or deleted.

Membership ID

Starting with the 2020-2021 membership year the "**Membership ID**" number will be a unique 8-digit number and follow a member throughout their BPA journey.

 Click on the "Membership ID" link to display detailed Student Member Information. This link also gives you the option to "Print" the "Student Membership Card" if the student is a paid "Member."



Additional Features

- Submitted Date = Date the Student Member was submitted for membership.
- **Membership Date** = Date that the Student Membership was paid.
- Edit = Click the "Pencil" icon under the "Edit" column to edit the Student Member Information.
- **Request Change** = Click on the "**Person**" icon under the "**Edit**" column to request a "**Name Change**" for a Student Member.
 - When you submit a "Name Change Request", the State Advisor will be notified via email. The State Advisor will have to approve the name change request before you will see the Name Change on your screen.

How to Add a Student

- 1. Click on the "Students" Tab.
- 2. Click on the "Add Students" Button.
- 3. There are three (3) ways to add a Student Member.
 - a. Individual Member Entry
 - b. Bulk CSV Upload Method
 - c. Bulk Member CSV Entry Method

Individual Member Entry Accordion

- Use this method to manually enter individual Student Members.
- All data fields highlighted in **RED** are required.

(Buss	First Name:				Middle Name:			L	ast Name:			Suffix:	
Select 🗸	First Name]	Middle Name				Last Name			Select	~
e: Gender:							Ethnicity:			Membe	r Title:		
Select	,	~	Select		~		Select		~	Chap	ter Member		~
mail: Cell Phone:							Home Phone:			DOB(e.	g 1/21/2000)		
Email Cell Phone							Home Phone			DOB			
Field Of Employment: T-Shirt Size:							Years As A Member:						
Field Of Employment			Select	~			Years As A Member						
SPA:			Non-traditional student in the field?				Membership in other CTSO?			Career Pathway:			
Select		~	Select	~			Select		~	Selec	:t		~
have a disability, and may require special acco	ommodations						(
Audio													
) Visual													
Mobility													
Dietary													
Other													
lease specify special accommodations reques	sted:												



- 1. Select the "Prefix" from the "Prefix" field drop-down list (optional).
- 2. Type the "Student First Name" in the "First Name" field.
- 3. Type the "Student Middle Name" in the "Middle Name" field (optional
- 4. Type the "Student Last Name" in the "Last Name" field.
- 5. Select the "Suffix" from the "Suffix" field drop-down list (optional).
- 6. Select the "Student Grade" from the "Grade" field drop-down list.
- 7. Select the "Student Gender" from the "Gender" field drop-down list.
- 8. Select the "Student Demographic" from the "Demographic" field drop-down list.
- 9. Select the "Student Membership Title" from the "Member Title" field drop-down list.
- 10. Type the "Student Email" in the "Email" field (optional).
- 11. Type the "Student Cell Phone Number" in the "Cell Phone" field (optional).
- 12. Type the "Student Home Phone Number" in the "Home Phone" field (optional).
- 13. Type the "Student Date of Birth" in the "DOB" field (optional).
- 14. Type the "Student Field of Employment" in the "Field of Employment" field (optional).
- 15. Select the "Student T-Shirt Size" from the "T-Shirt Size" field drop-down list.
- 16. Type the "Student Number of Years as a Member" in the "Years as a Member" field.
- 17. Select any "Student Disability" checkboxes from the "I have a disability field" checkbox fields (optional).
- 18. Type the "Student Member Special Needs Information" in the "Special Accommodations" field.
- 19. Click on the "Save and Finish" Button OR Click on the "Save And Add Next Member" if you want to enter another Student Member.

Bulk CSV Upload Accordion

- This method will require that you download a CSV template that you can complete on all of your student members.
 - The same "**Required**" data fields listed above also apply to this method.





- 1. Click on the "Download CSV Template" Button.
- 2. Open the template and save it to your computer.
- 3. Type the "Student Member Information" in the spreadsheet.
 - a. See all required fields on page eight (8).
- 4. Once you have entered all of the Student Members that you want to upload, **SAVE** the file again.
- With your mouse, Left-Click and Hold the Student Member CSV Download Template File and Drag it to the "Drag Files Here" area of the screen and release the Left-Click on your mouse.
- 6. Once you have Dragged the file to the screen and released the file, a screen will be displayed with all of the Student Members from the spreadsheet for review.
- 7. Click the "**Save**" Button.

IMPORTANT: If you do NOT click on the "**Save**" Button, your data will NOT be Saved to the Membership system)

Notes:

- If you have any student member information incorrect, it will be highlighted in **Red** and will not be Saved.
 - If you have Student Members highlighted in **yellow**, that is an indication that the student information has been duplicated.

Bulk Member CSV Entry Accordion

Use this method to copy and paste Student Member information from a spreadsheet **OR** you can manually type the information directly into the on-screen form.

(Bulk M	lember	CSV E	intry														
	Incomplete information entered on this screen will not be saved if you do not complete the process fully.																	
	8	Downloa	ad CSV T	Template	Save Export	t Data												
			Prefix	First Name	Middle Name	Last Name	Suffix	Grade	Gender	Demographic	Member Title	Email	Cell Phone	Home Phone	DOB	Field Of Employment	T-Shirt Size	Years As A Member
	L	1	- V				ν.			V	V						v.	

- The same "**Required**" data fields listed on page eight (8) also apply to this method.
- Be sure to click on the "Save" Button or Student Information will be lost.



How to Edit or Delete a Student Member

- Edit = Click on the "Pencil" icon under the "Edit" column for the Student you would like to edit.
 - If the student has not been submitted, you will have the option to "Edit" ALL Student Member Information. If the Student Member has been sumbitted, you will only have the option to "Edit" some of the Student Member Information.
- **Delete** = Click on the "X" icon under the "**Delete**" column for the Student you would like to delete.
 - If the student has not been submitted, you will have the option to "Delete" the Student Member. If the Student Member has been submitted, the "Delete" icon will no longer be available.

Home A	Additional Pin	Request Chang	ge My Passw	rord Logo	ut			Memb	ership Information	÷				
Students	Chapter	Information	Chapter Adv	/isor(s)	Conferences	Invoice	History	Quick Links	Notifications	State Information	Resources	E-Store	Surveys	Email
Add Studer	nts Memb	ership Download	Students V	Vith Access T	o Portal Pr	int Membersh	nip Cards F	rint Membership	Certificates Pre	vious Year Count	Email All Sub	mit Membership		
Select the real	d Check for E	ouplicate Members	button before	e submitting y	our affiliation.	Please use t	he Select All b	utton or individual	ly select students t	o be placed on an inv	oice.			
Select All /	Select All / Deselect All Delete Selected Show Inactive													
Show 10	✓ entries											Sea	rch:	
Status ↓†	Select 1	Membership ID ↓↑	Last Name ↓	First Name ↓ ,	Gender 1	Grade ↓↑	Member Title ↓†	Submitted Date ↓↑	Membership Date ↓↑	Invoice Number ↓† Tra	nscripts 🕴 Ed	Request dit ↓ ↑ Change	Transfe ↓↑ History	e ↓† Delete ↓
PENDING		<u>14-0013-003440</u>	White	Anne	Female	7	Student Leader 1	06/02/2020		1245		· ·	#	
MEMBER		<u>14-0013-003437</u>	Smith	John	Male	7	Student Leader 1	06/02/2020	06/02/2020	1246		ノ・	#	
		<u>14-0013-003438</u>	Jones	Sally	Female	8	Student Leader 2				1		#	(\mathbf{x})
		<u>14-0013-003439</u>	Johnson	Jimmy	Male	6	Student Leader 1				1		#	×
Showing 1 to	4 of 4 entries	5											Previ	ous 1 Next

Once a student member has been submitted they cannot be deleted, substituted or edited after five (5) business days (no exceptions).

It is recommended that you double check all student member information before submitting.

You must contact <u>bpamembership@bpa.org</u> within five (5) business days of submitting your membership to request to have a member deleted.



How to Submit Student Members

- 1. Click on the "Student" Tab.
- 2. Select the "Checkbox(s)" of the Student Member(s) that you want to submit.

Status ↓↑	Select	Mumbership ID ↓↑	Last Name ↓₹	First Name ↓ ₹	Gender ↓↑	Grade 1	Member Title ↓↑	Submitted Date ↓↑	Membership Date ↓↑	Invoice Number ↓†	Transcripts 🔱	Edit ↓↑	Request Change ↓†	Transfer History ↓↑	Delete 🕸
		<u>14-0013-003467</u>	White	Betty	Female	7	Chapter Member					1		#	×
MEMBER		<u>14-0013-003440</u>	White	Anne	Female	7	Student Leader 1	06/02/2020	06/08/2020	1245		1	1	*	
MEMBER		<u>14-0013-003442</u>	Sue	Sally	Female	6	Chapter Member	06/03/2020	06/08/2020	1249		1	1	#	
MEMBER		<u>14-0013-003437</u>	Smith	John	Male	7	Student Leader 1	06/02/2020	06/02/2020	1246		1	1	*	
		<u>14-0013-003466</u>	Smith	George	Male	8	Association					1		#	×

- 3. Click on the "**Submit Membership**" Button.
- 4. Read the National Disclaimer.
- 5. Click on the "I have Read and Agree Disclaimer" checkbox to continue.
- 6. Click on the "**Confirm**" Button.
- 7. Once you click on the "**Confirm**" button, a Confirmation Membership Fee Summary will be displayed on the Screen for your review.
 - a. If you see a problem with the fees listed select the "**Close**" Button and contact your <u>State Advisor</u> or National BPA at <u>bpamembership@bpa.org</u>.

Reset All Students' Passwords

- b. To download an overview of the membership fees, click the "**Export**" Button.
- 8. Once you have reviewed the Confirmation Membership Fee Summary, click on the "**Confirm**" Button to complete the submission of your Student Members.
- 9. Click on "View Invoices" if you want to "View" the invoice that was created when you Submitted Membership OR click on the "Pay Invoice(s)" Button, to Pay the Invoice that was created when you Submitted Membership OR Click on the "Pay Invoice(s) Later" Button, if you want review the Invoice that was created when you Submitted Membership at a later time.



Once a chapter member has been submitted for affiliation with your chapter, they cannot be deleted, substituted or edited after five (5) business days (no exceptions).

Submit Membership

Email All

[11]



How to Change a Submitted Student Name

- 1. Click on the "**Person**" icon under the "**Request Change**" column of the Student you would like to submit a "**Name Change**" request on.
- 2. Click on the "Request Name Change" Button.

Current Name				
Prefix:	First Name: Betty	Middle Name:	Last Name: White	Suffix:
New Name				
Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
Select v	Beatrice	Middle Name	White	Select ~
Reason For Change:				
Student wishes to use formal first na	ame rather than nickname			



- 3. Select the "Prefix" from the "Prefix" field drop-down list (optional).
- 4. Type the "Student First Name" in the "First Name" field.
- 5. Type the "Student Middle Name" in the "Middle Name" field (optional).
- 6. Type the "Student Last Name" in the "Last Name" field.
- 7. Select the "Suffix" from the "Suffix" field drop-down list (optional).
- 8. Type the "Reason for Name Change" in the "Reason for Change" field.
- 9. Click the "**Save**" Button.

How to View Student Transfer History

- 1. Click on the "**Arrows**" under the "**Transfer History**" column next to the Student Member you would like to view the "**Transfer History**" on.
 - a. If the student has never been transferred to another Chapter, there will be no transfer information displayed.









How to Print Membership Certificates

- 1. Click on the "Students" Tab.
- 2. Click on the "Print Membership Certificates" Button.
- Select the desired checkbox(s) located on the left-hand side of the Student Membership-ID for the Student Members that you want to Print Student Membership Certificates for OR Click on the "Select / Deselect All" link located under the "Back" Button to print ALL Student Membership Certificates.
- 4. Click on the "Print Membership Certificates" Button.

Print Me	mbership Certificates	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	Notifications	State Information	Resources	E-Store	Surveys
Email											
Back											
Select/De	select All										
how 10	✓ entries	_							Search:		
Ļ	Membership ID	μt.	Last Name	.↓† First	Name	.↓† Memb	er Type	.↓† Inv	oice Number		1
~	14-0013-003440		White	Anne		Stude	nt	124	15		
~	14-0013-003436		Dover	Janet		Chapt	er Advisor	124	15		
~	14-0013-003437		Smith	John		Stude	nt	124	16		
	14-0013-003438		Jones	Sally		Stude	nt	124	17		
	14-0013-003439		Johnson	Jimm	у	Stude	nt	124	17		
~	14-0013-003442		Sue	Sally		Stude	nt	124	19		
Showing 1 t	o 6 of 6 entries	1							Pri	Previous	1 Ne

How to View Previous Year Count

Note: Since the 2020-2021 membership year is our inaugural year of this new membership system, this report will not have data until the 2021-2022 membership year.

- 1. Click on the "Previous Year Count" Button.
- 2. A "**CSV (Excel)**" file will be auto generated. The file will display the Total Students and Advisors from previous year membership.

How to Reset Student Passwords

Important: Once you click on the "**Reset All Student Passwords**" Button, the student passwords will be reset to the default password for the chapter. This process cannot be reversed!

1. Click on "**Reset All Student Passwords**" Button.

Reset All Students' Passwords

[14]



How to Email All Student Members				
Students Chapter Information Chapter Advisor(s) Conferences Invoice Hist	ory Quick Links State Informatic	on Resources	E-Store Surveys	Email
1. Click on the " Students " Tab.				
2. Click on the "Email All" Button.	Previous Year Count	Reset All St	udents' Passwo	ords Email A
3. The " From " field will be auto popu	lated with the Prir	mary Cha	pter Advis	sor's email
address.				

- 4. Type your "Subject Text" in the "Subject" field.
- 5. Click on the "Choose File" Button to attach a File (optional).
- 6. Type your "Email Message" in the "Text Editor" field.
- 7. Click the "Send" Button.

est Email:		
rom:	Janet@gmail.com	
ubject:	Subject	
ttachments:	Choose File No file chosen	
x 6 C C	← → ♥- ⇔ ⇔ ■ 🖬 🎛 🗮 Ω 🔀 🕞 Source	
BISIL	≣ :≣ de de 99 Styles - Normal - ?	

NOTE: This will send an email to ALL Student Members that have an active email address in the Membership System.



Chapter Information Tab and Screens

How to Update Chapter Information

- 1. Click on the "Chapter Information" Tab.
- 2. Click on the "Chapter Information" Accordion.

Students Chapter Information Chapter Advi	isor(s) Conferences Invoice History	Quick L	inks Notificati	ons State Infor	mation Resour	ces E-Store	Surveys Email
Chapter Information							
School Name:		Chapter Name:					
Dover - 4098			Test Chapter				
Original Chapter ID:	Phone Number:		Extension:	Fax Number:			Student Password:
Original Chapter ID	(555) 666-1234		Extension	Fax Number			Student Password
Principal's First Name:	Principal's Last Name:				Principal's Email:		
Janet	Dover				janet@gmail.con	ı	
Chapter Website:	School Website:		Twitter:			Facebook:	
Chapter Website	School Website		Twitter			Facebook	
Division:	State District:		Uses State Licer	nse Fees: 🗵			
Middle Level	Alaska	~					
Receive Membership Pins? 🗹							
Number of BPA Direct Magazines Requested:							
1							
Addresses							
Graduating							

Save

- 3. Complete ALL required fields (those highlighted in **RED**).
- 4. Click on the "**Addresses**" Accordion.
- 5. Complete ALL required fields (those highlighted in **RED**).
- 6. **Opt-out of Membership Pins** = By checking this box you are choosing not to receive the annual BPA membership pin.
- 7. Click on "Graduating" Accordion.
- 8. Complete "Highest Grade Level for this Chapter" and "How to Graduate Your Student Members."
- 9. Click on the "Save." Button.

Chapter Advisor(s) Tab and Screens

Status Action Button = By clicking the "**Checkmark**" icon under the "**Status**" column you can make a "**Chapter Advisor**" inactive. To make a Chapter Advisor active click on the "**Status**" column.

IMPORTANT

The student password is a generic password given to the Student Member to login to the Student Portal. A student will need their Membership ID and the generic password to login.



How to Add History Information

- 1. Click on the "History" Button.
- 2. Click on the "Create History" Button.
- 3. Type the "Date" in the "Service Date" field.
- 4. Type the "Subject Text" in the "Subject" field.
- 5. Type the "History Details" in the "Details" field.
- 6. Click the "Save" Button.
- 7. Repeat above steps to add additional "History" entries for Chapter Advisors.
- 8. Click on the "**Back**" Button to return to the "**Chapter Advisors**" screen.

History for Sally Booth

e	Conference Attended / Community Serv	vice / Competitive Event Placement		
en de Date	Subject			
alls				
Home Additional Pin Request Change My Password Logout		Membership Information 🔸		
Students Chapter Information Chapter Advisor(s) Con	ferences Invoice History Quick Link	s Notifications State Information	Resources E-Store	Surveys Email
Add Existing Advisor Email All Add Chapter Staff				
iow 10 v entries				Search:
now 10 ventries		a it Status it Yoars &s A BBA Ad	it Invoice Number	Search:
low 10 → entries kdvisor ↓ Type i† Office Phone i† Membership	ID 11 Email 11 Cell Phone	e ⊥† Status ⊥† Years As A BPA Ad	visor 🕼 Invoice Numb	Search: er 11 History 11 Edit 11
tow to entries Advisor II Type II Office Phone II Membership Alss Janet Dover Primary (555) 666-1234 003436 003436	ID Email Cell Phon Janet@gmail.com	e 🕼 Status 🕼 Years As A BPA Ad	visor 1 Invoice Numb	Search: er Iî History Iî Edit Iî History 🖍
Now 10 entries Advisor Jà Type I Office Phone II Membership Aliss Janet Dover Primary (555) 666-1234 003436	ID if Email if Cell Phon Janet@gmail.com	e iî Status iî Years As A BPA Ad	visor 11 Invoice Numb 1245	Search: er if History if Edit if History /

How to Edit or Delete History Information

Edit:

- 1. Click on the "History" Button.
- 2. Click on the "**Pencil**" icon under the "**Edit**" column next to the Chapter Advisor that you would like to edit.

Delete:

- 1. Click on the "History" Button
- Click on "X" icon under the "Delete" column next to the entry you would like to delete.
- 3. Click on the "**Confirm**" Button to delete **OR** click on the "**Close**" Button to cancel the action.



How to Add an Existing Advisor									
Home Additional Pin Request Change My Password Logout		м	embership Informa	ition 🕇					
Students Chapter Information Chapter Advisor(s) Conferences	Invoice History	Quick Links	Notifications	State Information	Resources	E-Store	Surveys	Email	
Add Existing Advisor Email All Add Chapter Staff									
Show 10 v entries							Search:		
Advisor \downarrow_{\pm}^{\pm} Type $\downarrow\uparrow$ Office Phone $\downarrow\uparrow$ Membership ID $\downarrow\uparrow$	Email 1	Cell Phone	.↓↑ Status .↓↑	Years As A BPA Advi	sor ↓†	Invoice Numbe	r .↓↑	History 👃	† Edit ↓†
Miss Janet Dover Primary (555) 666-1234 003436	Janet@gmail.com		*	3		1245		History	1
Showing 1 to 1 of 1 entries								Previous	1 Next

BPA Inc. Membership System

- 1. Click on the "Chapter Advisor(s)" Tab.
- 2. Click on the "Add Existing Advisor" Button.
- 3. Follow the on-screen instructions.

How to Add Chapter Staff

- 1. Click on the "Chapter Advisor(s)" Tab.
- 2. Click on the "Add Chapter Staff" Button.
- 3. Click on the "User Information" Accordion.
- 4. Complete "User Information" (all fields highlighted in RED are required).

Add Existing Advisor

Email All

Add Chapter Staff

Prefix:	First Name:			Middle Name:		Last Name:			Suffix:	
Select v	First Name			Middle Name		Last Name			Select	
Office Phone:		Extension:			Fax Number:			T-Shirt Size:		
Office Phone		Extension			Fax Number			Select		
Email:			Alternate Email:				Cell Phone:			
Email			Alternate Email				Cell Phone			
Password:		Advisor Type:			LinkedIn Link:					
Password		Primary		~	LinkedIn Link					
Opt into partner emails										

IMPORTANT: There can **ONLY** be one (1) Primary Advisor. Any additional Chapter Staff added MUST be Secondary Advisors. If you choose Primary, it will change the Primary Chapter Advisor to a Secondary Advisor.



How to Email All Chapter Staff	
 Click on the "Chapter Advisor(s)" Tab. Click on the "Email All" Button. 	Add Chapter Staff
From: sallybooth@rmc.com Subject: Subject Attachments: Choose File No file chosen	
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	

- 3. The "**From**" field will be populated with the Primary Chapter Advisor's email address.
- 4. Type your "Subject Text" in the "Subject" field.
- 5. Click on the "Choose File" Button to attach a File (optional).
- 6. Type your "Email Message" in the "Text Editor" field.
- 7. Click on the "**Send**" Button.

Conference Tab and Screens

Note: This section will be updated soon (remainder of page left blank intentionally)



Invoice History Tab and Screens. Conferences Invoice History Students **Chapter Information** Chapter Advisor(s) **Quick Links** State Information Resources E-Store Surveys Email 1. Click on the "Invoice History" Tab. Pav Invoi Historical Invoices Invoice Payment History Membership Statemen 2. Click on the "Pay Invoices" Button.

- Select the "checkbox(s)" located in the "Pay All" column on the left-hand side of the invoice that you want to pay.
- Click on the "Pay by Credit Card" Accordion if you want to pay by Credit Card OR Click on the "Enter PO Number" Accordion to record your "PO information".
- 5. Follow the on-Screen Instructions based on your Payment Method.
- 6. Click on the "**Pay**" Button.

A 3% processing fee will be applied to all invoices paid by credit card.

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Students	Chapter information	Chapter Advisor(s)	Conferences wake Payment Quick Links	Nouncations	state mormation	Resources E-Store	surveys Email	
Back								
Pay All	Invoice #	Date	Invoice Type	Paid Status	Terms	Amount Due	Items	
	1245	06/02/2020	Middle Level Membership	Unpaid	Net 30	\$35.00	National Student I	Vembership Dues
							Total: \$10.00	Balance: \$10.00
							National Chapter	Adviser Dues
							Total: \$10.00	Balance: \$10.00
							Student State Due	es
							Total: \$5.00	Balance: \$5.00
							Chapter Adviser S	State Dues
							Total: \$10.00	Balance: \$10.00
	1247	06/03/2020	Middle Level Membership	Unpaid	Net 30	\$30.00	National Student I	Membership Dues
							Total: \$20.00	Balance: \$20.00
							Student State Due	es
							Total: \$10.00	Balance: \$10.00
	1248	06/03/2020	Middle Level Membership	Unpaid	Net 30	\$15.00	National Student I	Membership Dues
							Total: \$10.00	Balance: \$10.00
							Student State Due	es
							Total: \$5.00	Balance: \$5.00

How to View Invoices

- 1. Click on the "Invoice History" Tab.
- 2. The "Invoice Screen" will populate.
- 3. Click on the "**Payments**" Button to view "**Payments**" that have been made.
- 4. Click on the "PO's" Button to view "P.O. information."
- 5. Click on the "Eye" icon under the "View" column to view the desired Invoice.



Students	Chapter Information	Chapter Advisor(s)	Conferences Invoice H	listory Quick Links	Notifications	State Information Res	ources E-Store	Surveys Email				
Pay Invoices	Historical Invoices	Invoice Payment History	Membership Statement					Q Search	Be	gin Date	End Date	×
Show 10	✓ entries									Search:		
Invoice Numb	er ↓≟ Invo	ісе Туре	1 Conference	11 Total	1 Balance Due	↓† Paid On	11 Created	1 National/State	1 Payments	P.O.'s	View	11
1245	Mir	ddle Level Membership		\$35.00	\$35.00	Unpaid	06/02/2020	National	\frown	P.O.'s	۲	
1246	Mir	ddle Level Membership		\$15.00	\$0.00	06/02/2020	06/02/2020	National	Payments		۲	
1247	Mi	ddle Level Membership		\$30.00	\$30.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1248	Mir	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1249	Mi	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1250	Mi	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1251	Mi	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1252	Mit	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
1253	Mie	ddle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2020	National		P.O.'s	۲	
Showing 1 to 9 of	of 9 entries									Prev	rious 1	Next

BPA Inc. Membership System

Historical Invoices

nvoice Payment History

Membership Statement

Pay Invoices

How to View Historical Invoices

- 1. Click on the "Invoice History" Tab
- 2. Click on the "Historical Invoices" Button.
- 3. Click on the "**Payments**" Button to view "Payments" that have been made.
- 4. Click on the "PO's" Button to view "P.O. information."
- 5. Click on the "Eye" icon under the "View" column to view the desired Invoice.

NOTE: Historical invoices are invoices that have been generated in previous years.

How to View Invoice Payment History

- 1. Click on the "Invoice History" Tab.
- 2. Click on the "Invoice Payment History" Button.



NOTE: The Invoice Payment History screen includes the following: payment information, date paid, pay type, check number, invoice number, payment total, overpayment amount, refund amount and refund date.



How to View the Membership Statement 1. Click on the "Invoice History" Tab Click on the "Membership Statement" Button. Historical Invoices Invoice Payment History Membership Statement Pay Invoices **NOTE:** The Membership Statement is generated as a PDF that can be **viewed** | saved | printed. **Quick Links Tab and Screens** Quick Links are setup by National BPA. These links may take you to 3rd party websites outside of the BPA Membership System. 1. Click on the "Quick Links" Tab. Informational Links Click on the "URL" listed under the "Informational Links" list. • Reports Quick Links Chapters State Staff and Permissions Rates and Settings Conferences Accounting Resources Requests E-Store Surveys Informational Links Instructional Webinar and Resources: http://www.BPAdirect.org/2017/08/21/get-acquainted-BPAs-new-online-membership-system Help Chapters in Need With BPA's Disaster Relief Fund **BPA Websites:** BPA Inc. Website: https://www.BPA.org/ BPA Direct: https://www.BPAdirect.org Shop BPA: https://www.shopBPA.org Register for a High School Conference **Notifications Tab and Screens**

System Messages (Notifications) are sent through the Membership System by National BPA. When you log into the Membership System, the System Message will appear on your screen. Once you click on the "**Confirm**" Button, the System Message will no longer appear on your screen. If you want to go back and review the System Message, you would click on the "**Notifications**" Tab – See Example Below. System Notifications can have expirations dates that are set by National BPA. Once the notification has expired, you will no longer be able to see the System Message under the Notifications Tab.

- 1. Click on the "Notifications" Tab.
- 2. Click on the "Eye" icon under the "View" column to open the notification.
- 3. Click the "**Back**" Button to return the "**Notifications**" page.



Show 10 v entries			Search:
Title		↓† View	ţt.
Testing Notifications	06/04/2020	۲	
Showing 1 to 1 of 1 entries			Previous 1 Next
	BPA Inc. Membership System		
State Information Tab and Screens	5		

1. Click on the "State Information" Tab

Students Chapter Inf	ormation Chapter Advisor(s	Conferences Invoice Histor	y Quick Links Sta	te Information Resources E-Store	e Surveys Email Torch Aw
State Advisor Co	ontact				
State Dues					
Show 10 🗸 entries					
Fee Туре	↓≟ Division(s)	↓† Expiration	↓† Amount	1 Minimum Affiliants	↓↑ Flat Rate
Chapter Advisor	All	07/31/2021			No
State License Fee	All	Never Expires			No
Student	All	07/31/2021			No
Showing 1 to 3 of 3 entries					
Current State M	embership Date(s)				
October 10, 2018 Aarch 1, 2019					
State Meeting D	ate(s)				
Fall Conference Dates:				Starts On October 1, 2020	

Resources Tab and Screens

How to Download Chapter Resources

Resources are managed by National BPA. You may see multiple "**Accordions**" under the "**Resources**" Tab.

- 1. Click on the "**Resources**" Tab.
- 2. Click on the "Chapter Resources" Accordion(s).
- 3. Locate the "Resource" you would like to download from the list.
- 4. Click on the "Download" icon located on the right-hand side of the "Resource."



Chapters	Requests	State Staff and Permissions	Rates and Settings	Conferences	Accounting	Reports	Quick Links	Notifications	Resources	E-Store	Surveys	
Chapter Res	source Inform	nation										
Chapter Res Resources in t	sources this section are	available to all chapters through N	lovember 1, 2020. After this	s date, only affiliat	ed chapters will be	able to acces	ss these documents	s.				
Show 10	∽ entries							\frown		Search:		
Item Name	ource 1			05/26/2	1 020		(Download (1))			11
Showing 1 to 1	1 of 1 entries										Previous 1	Next
				BPA	Inc. Membership \$	System						

E-Store Tab and Screens

E-Store items are offered and setup by National BPA. E-Store Items can have expiration dates that are also set by National BPA. Once the E-Store Item has expired, you will no longer be able to purchase the item under the E-Store Tab.

- 1. Click on the "E-Store" Tab.
- 2. Click on the "Chapter Items for E-Store."
- 3. Locate the "E-Store Item(s)" you would like to purchase.
- 4. Click on the "Select" checkbox to choose the "E-Store Item."
- 5. Type on the "Quantity" you would like to purchase in the "Quantity" field.
- 6. Click on the "Create Invoice" Button once you have added all of the "E-Store Items" you would like to purchase.
- 7. Click on the "Export" Button to download a PDF of the items you purchased.
- 8. Click the "**Confirm**" Button to confirm purchase and generate an invoice.
- 9. Click on the "Close" Button to close the window.

how 10 v entries					Search	:
ltem	↓≞ Student	1 Student ID	1 Description	🕼 Price 📢 Qu	antity	Select
Chapter Adviser E-Store Item			Chapter Adviser E-Store Item	\$55.00	Quantity	
howing 1 to 1 of 1 entries						Previous 1 Next
aid Publication						
In Tublication						



Confirmation		×
Item	Quantity	Amount
Chapter Adviser E-Store Item	1	\$55.00
Invoice Total: \$55.00		
Please confirm the items you are purchasing.		
		Export Close Confirm

How to Request a Refund

- 1. Click on the "E-Store" Tab.
- 2. Click on the "**Refunds**" Button.
- Select the "Select All" checkbox if you want a refund for all Items on the invoice OR Click "Expand Items + icon" and use the "Select" checkbox on the righthand side of the item(s) that you want to have refunded.
- 4. Click on the "Submit Refund Request" Button.
- 5. Click on the "**Confirm**" button to "**Confirm**" that you want to receive a "**Refund**" on the Item(s) **OR** Click on the "**Close**" Button to "**Cancel**" the "**Refund**" request.

Chapters	Requests	State Staff and Permissions	Rates and Settings	Conferences	Accounting	Reports	Quick Links	Notifications	Resources	E-Store	Surveys
										$ \longrightarrow $	Refunds
Chapter Ite	ems for E-Store)									
Show 10	✓ entries								Search	1:	
Item		J≟ Student	J↑ Student ID	1 Description		.↓† P	rice 🕼 🕻	Quantity		11 Selec	at 👘
Chapter Ac	dviser E-Store Iter	m		Chapter Advise	r E-Store Item	\$	55.00	Quantity			ノ
Showing 1 to	o 1 of 1 entries									Previous	1 Next
Paid Public	option										

Create Invoice



Store Refunds			
xpand Items	Invoice Number		Select
-	1248		Select All
tem Name	Amount	Member	Select
Fest Item	\$10.00		✓

How to View / Continue a Survey

Surveys are developed and managed by National BPA. You may see multiple Accordions under the "**Survey**" Tab.

- 1. Click on the "Surveys" Tab.
- 2. Choose an "Accordion" from the Survey Accordion List.
- 3. Click on the "View" Icon located beside the "Survey" that you want to take.
- 4. Complete the questions on the "Survey."
- 5. Click on the **"Save**" Button to save the survey to finish later **OR** Click on the **"Submit**" Button if you are finished and want to submit the survey.

elect A Category								
Chapter Adviser Surveys								
Show 10 v entries							Search:	
Survey Name	↓≟ Name(s)	↓ ↑ Status	↓↑ Conference	↓ ↑ Event	↓† Team	↓↑ View/C	ontinue Survey	
Chapter Adviser Test Survey	System Admin	Not Started				(•		
Showing 1 to 1 of 1 entries								Previous 1

BPA Inc. Membership System



Email Tab and Screens

How to Send an Email

The Email option allows you to send an email to ALL Student Members or you have the option to select specific Student Members to send an email to. **ONLY** Student Members that have an email address in their Student Member record will appear on this screen. Click on the "**Select/Deselect All**" option to select All Student Members or deselect ALL Student Members.

- 1. Click on the "**Email**" Tab.
- 2. Click on the "**Checkbox(s)**" located on the left-hand side of the student(s)that you would like to email.
- 3. Type your "**Subject Text**" in the "**Subject**" field.
- 4. Type your "Email Message" in the "Message" field.
- 5. Click on the "**Send**" Button.

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	Notifications	State Information	Resources	E-Store	Surveys	Email	

Select Members to send Email to:

Z Sally Sue (Student)	Anne White (Student)
Subject:	
Subject	
Message:	
X 🗅 🗎 🖬 🖬 🔸 🥕 🕸 🕫 👳 🛤	\square \blacksquare \blacksquare Ω Σ \square Source
B I S II _x I≣ .≣ .⊞	- Format - ?
	Type your message here.
$\overline{}$	