

PORTALBUZZ IMPLEMENTATION



Dear Club Portalbuzz Admins,

The Regional, District and Club Portalbuzz admins for all the Region ad Districts (except for few) has been added. Now let us commence our work on implementing Portalbuzz Membership Management System in India Area.

We can accomplish this in below three simple steps.

1. Login and familiarize Portalbuzz
2. Update the membership details of your Club in the Portalbuzz.
3. Educate members of your Club and popularizing Portalbuzz, so that each and every member can use it.

Step 1: Login and familiarize Portalbuzz

- a. Please visit the Portalbuzz website www.portalbuzz.com
- b. Click Login and follow as in pics below.



Fig.1

Fig.5

Enter the password of your choice, enter once again to confirm it and submit. Please write down the password for future reference.

Again go to www.portalbuzz.com and **login with new password** as below.

Fig.6

Name of your Club will appear as above. Click the LOGIN button to take you to the entry page of Portalbuzz as in Fig-7 below.

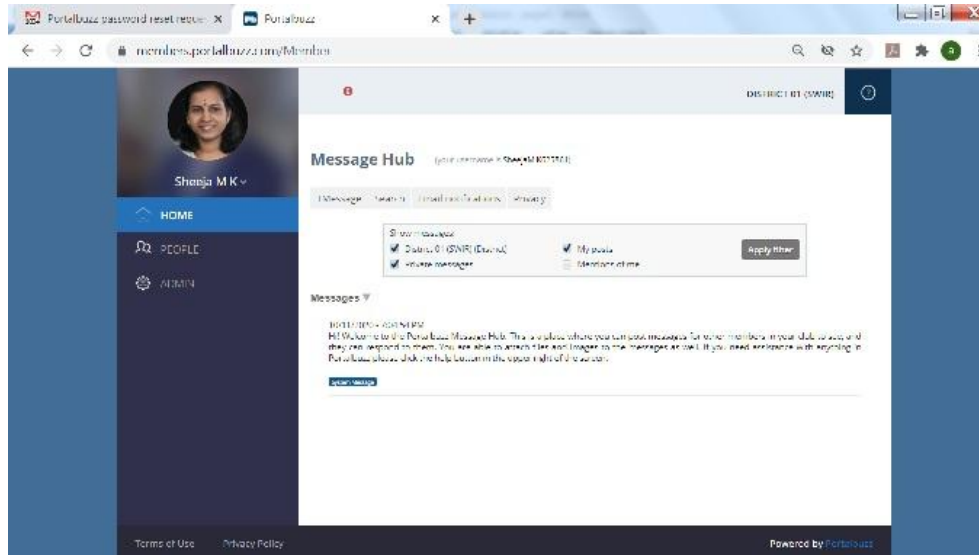


Fig.7

The HOME, PEOPLE and ADMIN are the Menu selections available on the left side.

HOME: In this you can type messages and send it to all the members of your Club. The photo of Club events etc. can also be sent along with the messages. This feature allows you to use the Portalbuzz as an archive for your Club activities. The members can send their comments also using the same screen at their side.

PEOPLE: Select the Menu PEOPLE, the following screen will appear.

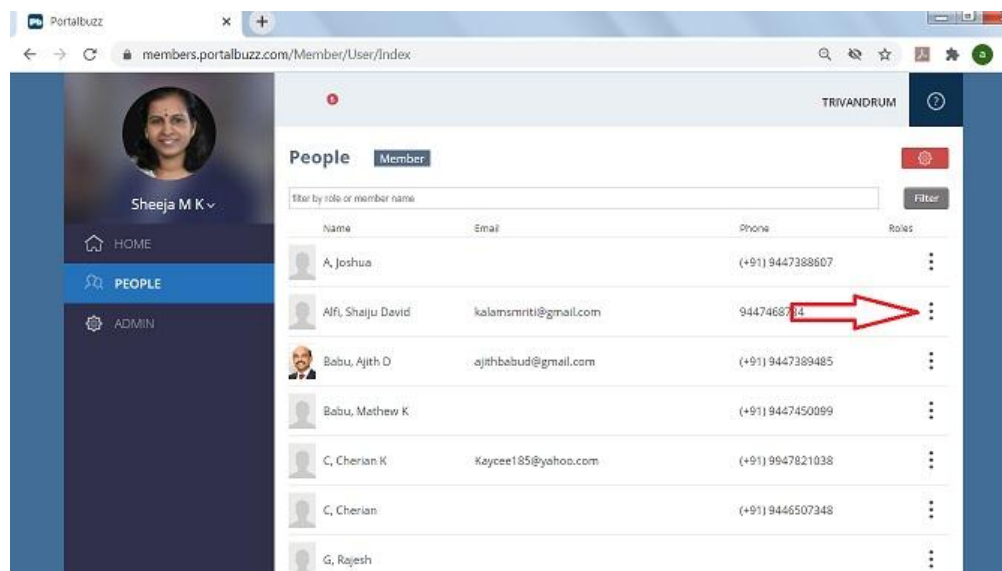


Fig.8

You can see the list of members of your Club in the screen in alphabetic order as above.

Click the 3 dots at the right hand side against each member. The below dropdown menu will appear.

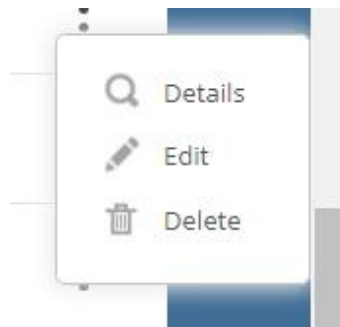


Fig.9

By selecting DETAILS -you can see the details of the selected member.

By selecting EDIT -you can edit the details of the selected member. For entering the joining date of your members, please refer your Club Records.

By selecting DELETE -you can delete of the selected member from the list.

Please take care to click the SAVE button at the bottom of the screen after editing the details of the members.

Adding NEW MEMBERS:

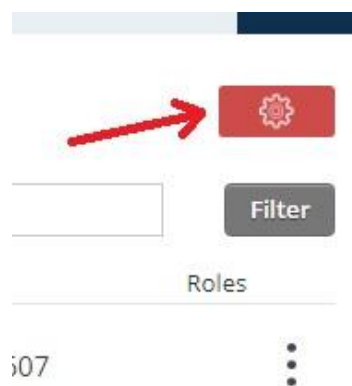


Fig. 10

Please find the Red button on the right hand top side of the screen. Click the button, the below screen appear for new member data entry.

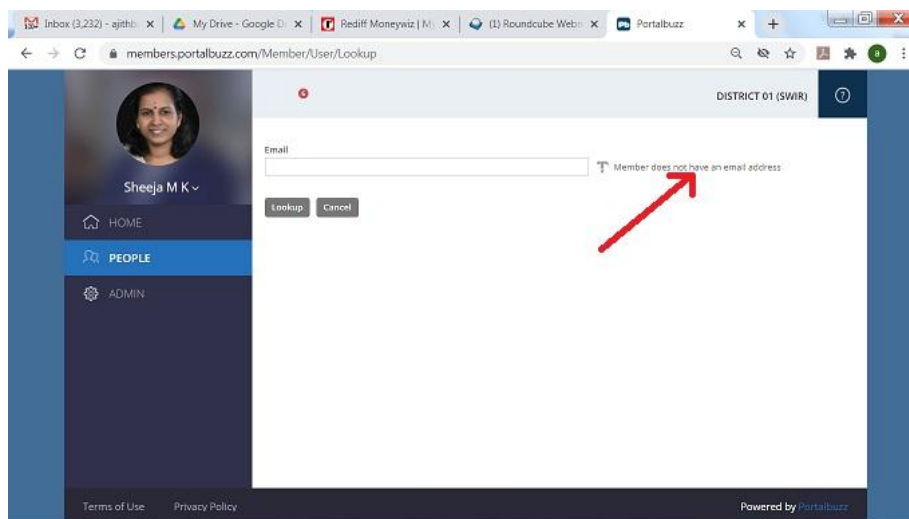


Fig.11

For adding a new member to the Portalbuzz system, the minimum information required is his first name and last name. (The last name can be his initial). Please take care to save the entered detail by pressing the SAVE button at the bottom of the editing screen.

The first step in adding new member is to add the email id of the new member. Portalbuzz allows us to add a new member, without his /her email id. But email id is required, if he /she want to access the Portalbuzz.

Transfer of members from one Club to other, can be done only at District / Regional / Area admin level.

Printing Members' directory: The second menu in Red button is "Printable Directory". The user can choose the details of the members to be get downloaded and the format, ie. **in .pdf or in Excel format.**

ADMIN: The menu for the admin is shown as below. Please note that the "add/edit/delete Members" in this section is duplicate of PEOPLE that we have just seen.

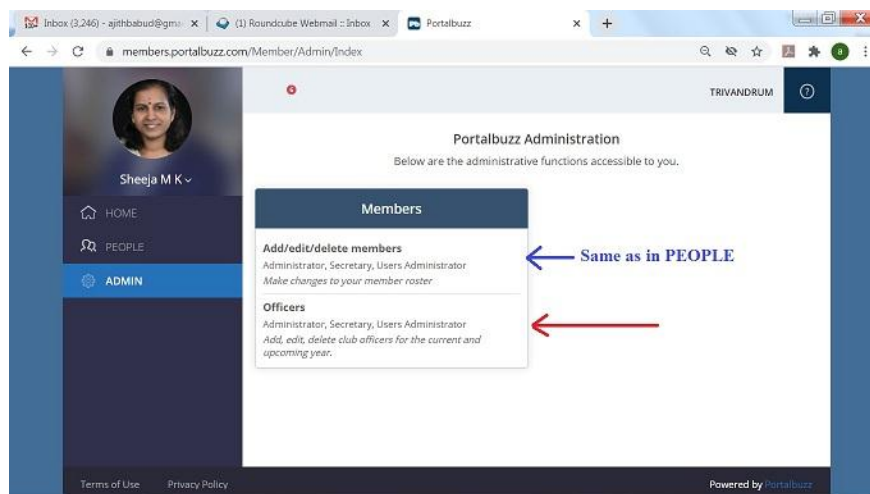


Fig.12

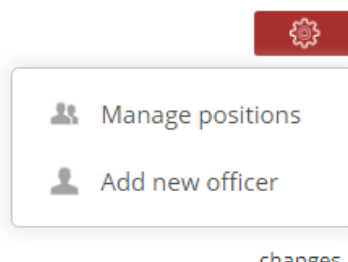
Let us enter the menu **Officers**, the below screen appears

position	officer	start date	end date	edit	remove	changes log
Club President	Tharakan T.J. Thomas	Wednesday, July 1, 2020	Wednesday, June 30, 2021			
Past Club President	M K, Sheeja	Wednesday, July 1, 2020	Wednesday, June 30, 2021			
Club Secretary	M K, Sheeja	Wednesday, July 1, 2020	Wednesday, June 30, 2021			
Club Treasurer	C, Cherian K	Wednesday, July 1, 2020	Wednesday, June 30, 2021			
Club Bulletin Editor	Jose, Mary	Sunday, October 18, 2020	Wednesday, June 30, 2021			

Fig.13

It shows the name of the Club officers as above. Please note that in the above, the club shown, has assigned all its office bearers. Your screen will be a blank one, as you have not yet assigned any officers.

For adding the name of your members to the office, please press the Red button on the top of the screen. The following selection will appear.



Please select and click on **Add new officer**.

Fig.15

We can assign the office to the Club members by selection their name at Member Column after selecting the position. Please note that you have to enter the First name of the member (exactly as you have entered earlier for adding members) and wait for the few seconds to appear it in dropdown. You can select the name from the dropdown list and save it. You can add all the officers like this.

Please note in the default list, you will not find the **Bulletin Editor** and **Y's Guy** etc.. Let us now add this officers too in the list.

For this go to **Admin**, press **Officers** and select **Manage positions** from the **Red Button**. Press **Add New Position**, the below message box appears.

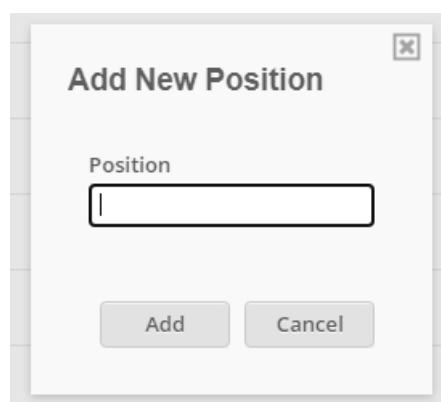


Fig.16

Now we can add the new positions like Bulletin Editor, Ys Guy, Joint Secretary etc. to your Club. After adding the new officers, you have to go back to the above session to assign the members to these positions.

You may find that the positions listed for officers are Not in the hierarchical order, as first President, then President Elect etc.

This can be corrected by go back to **Manage Officers** screen as in Fig-13. Press the Red button to get the Screen Manage Officer position. You can see a hand symbol against each position as in Fig.17.

You can place the cursor over it, an **up and down arrow** instead of the cursor symbol. You can **hold the mouse button** and **slide** the selected row **Up and Down** to make the officer list in hierarchical.

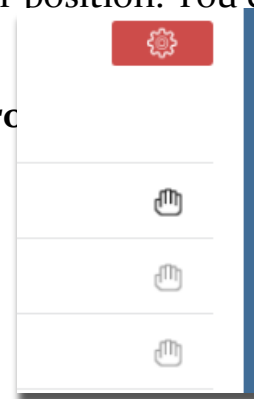


Fig.17