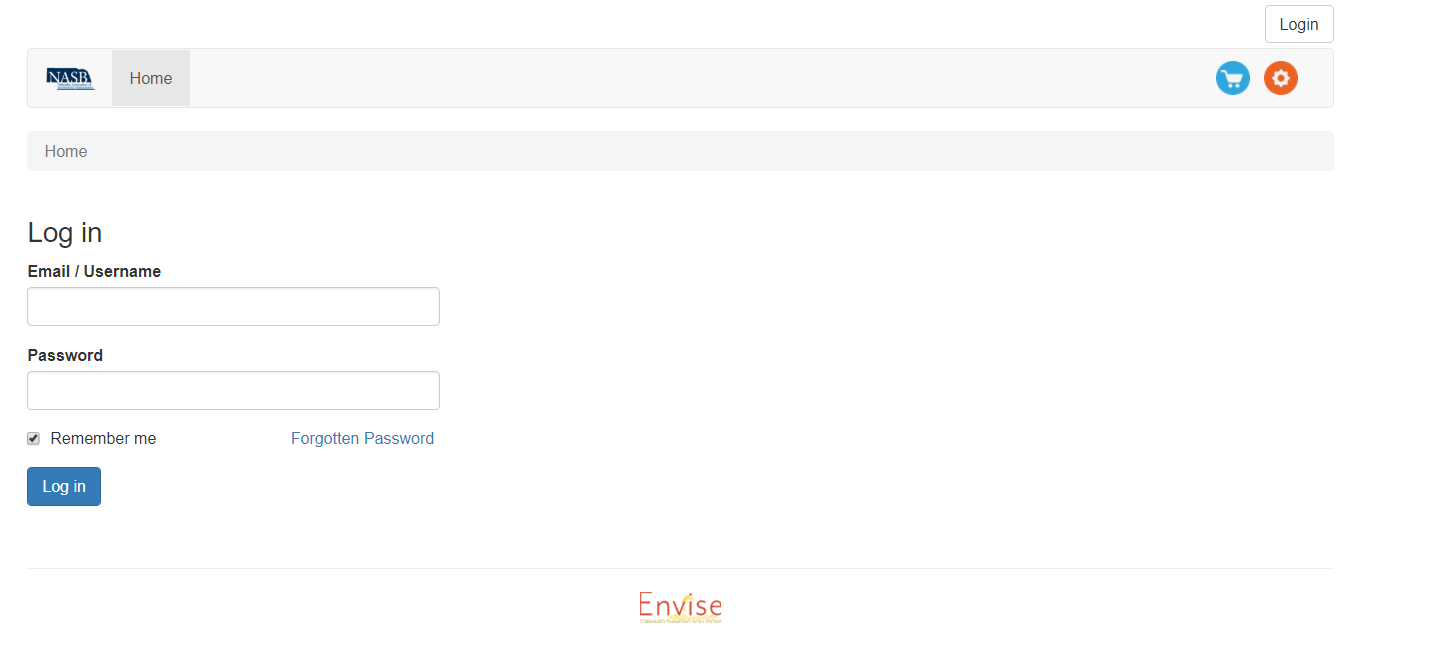
**NASB Membership Portal Manual**

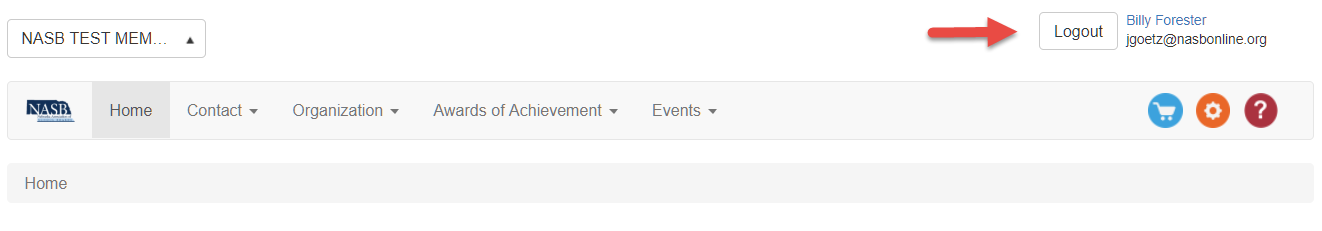
**Login**

Go to [www.nasbonline.org](http://www.nasbonline.org). You will see there is a link to click that will navigate to our new Membership Portal webpage. Click on the link and this will take you to our new Membership Portal. Click on “Login” at the top right-hand corner and sign in with your new username and password.

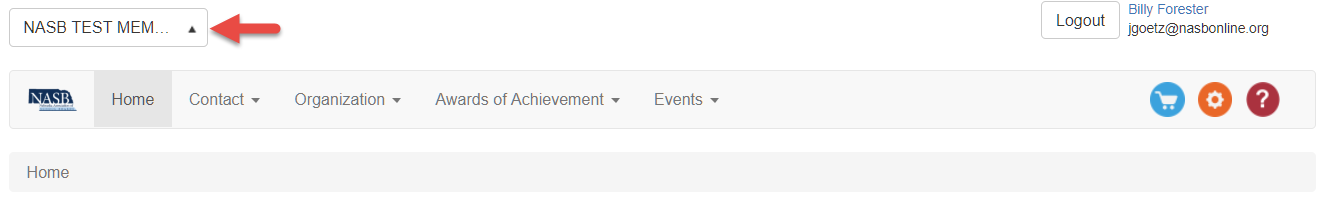
* 1. Username = email address
  2. Password = password123



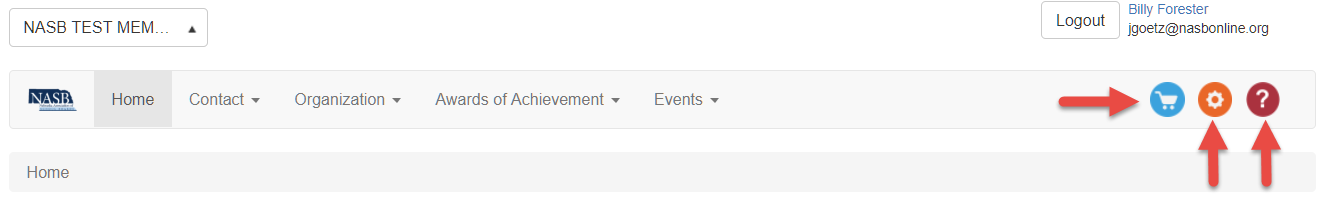
1. Once you have logged in you will see that you have a navigation bar going across the top with tabs and in the upper right-hand corner your “Name” and “email address” will be shown:



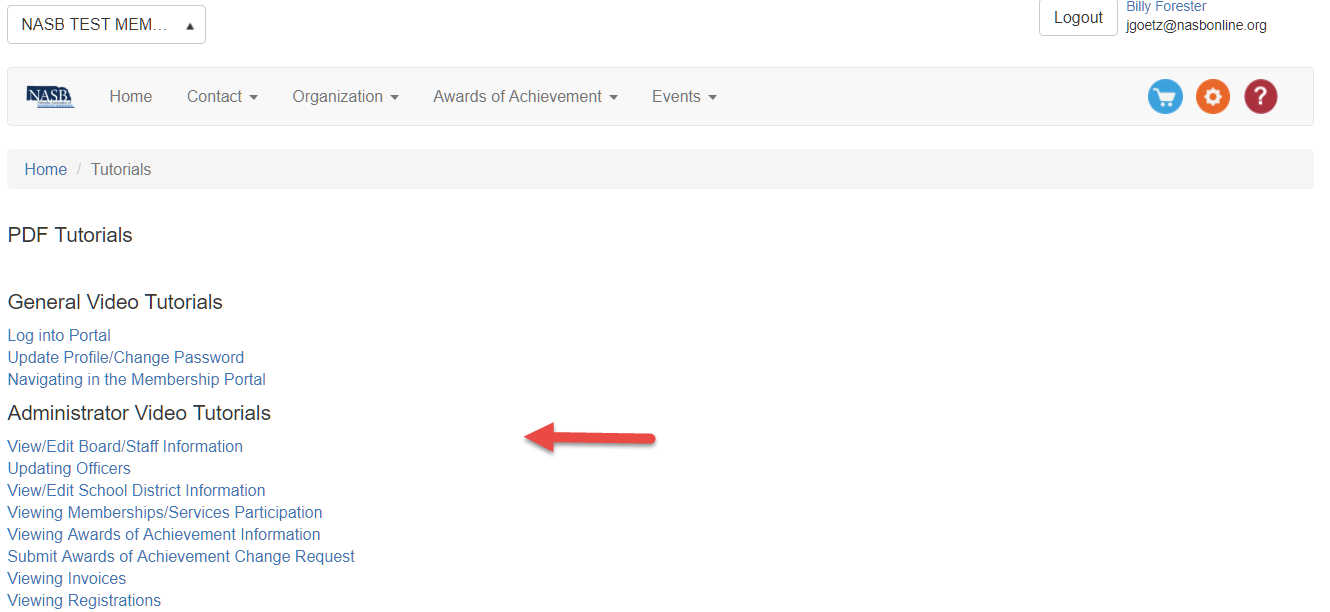
1. You will see in the upper left-hand corner, if you are a shared superintendent, this is where you can select your different school district



1. You will also see off to the right a blue icon with a shopping cart.



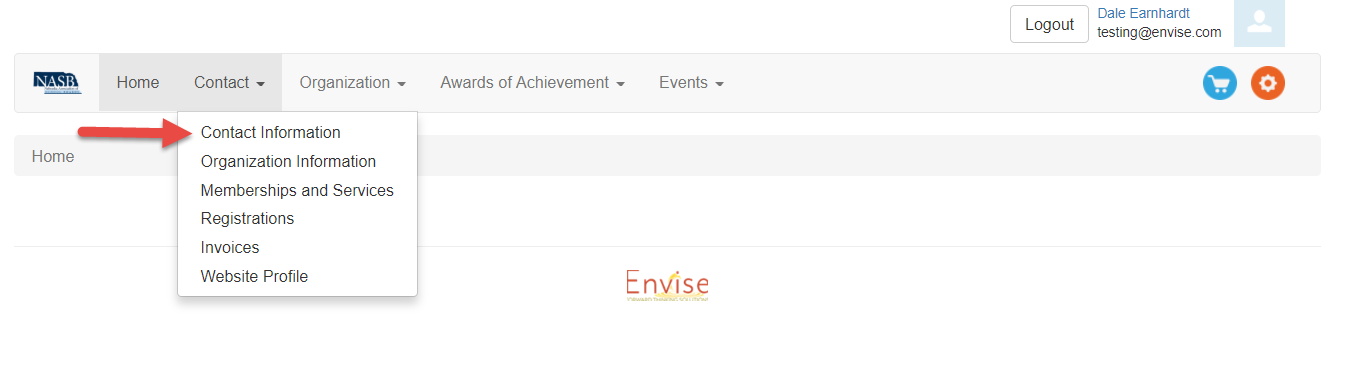
1. This is your shopping cart and will show you any items and registrations you have in your cart.
2. The orange gear icon will allow you to update your website profile. This is where you can change your password, add a picture, and change your email address. **\*\*\*Please keep in mind this page does not make changes to your contact record in our system, this is just your website profile\*\*\*.**
3. The red icon with a question mark will show you a listing of video tutorials that you can click on to help you navigate through this system.



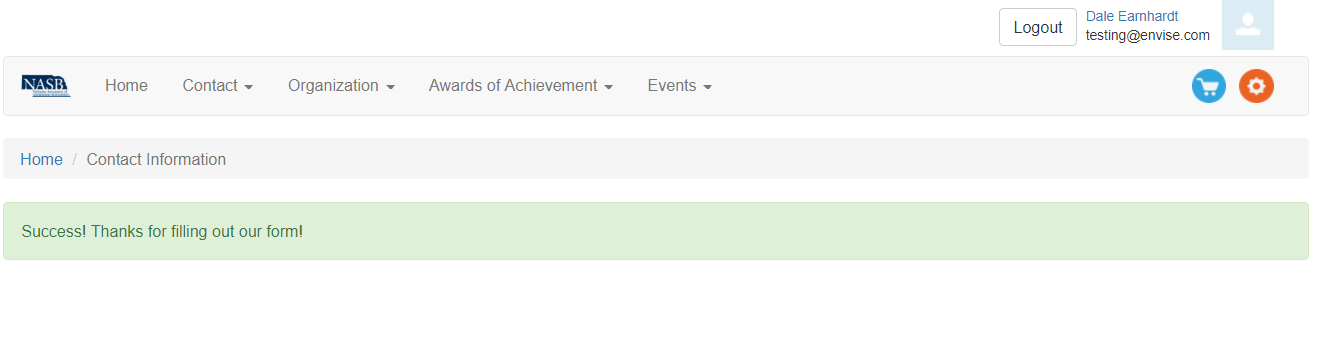
**Contact Tab**

***Contact Information Dropdown***

* Click on “Contact” and then select “Contact Information”

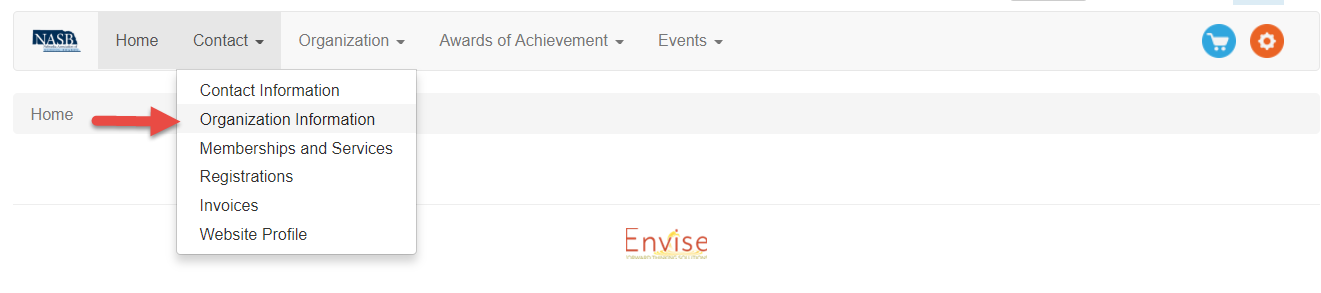


1. On this page you will see your contact information, including general contact information, mailing and email addresses, and demographics.
2. If you need to make changes to anything on this page, simply make your changes and hit “submit” at the bottom of this page.
3. Once you hit “submit” you will see that it is loading your changes and then scroll back up on the page and you will see the following message:



***Organization Information Dropdown***

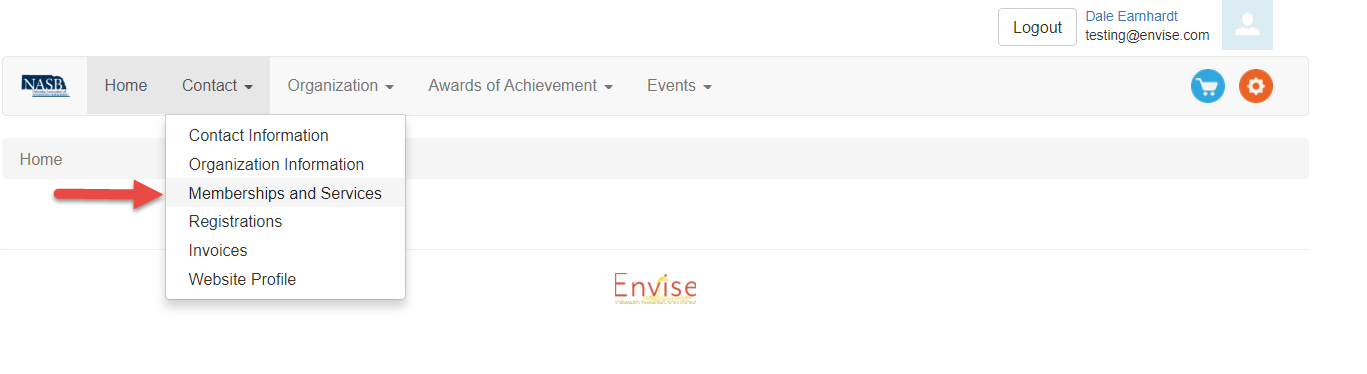
* Click on “Contact” and then select “Organization Information”



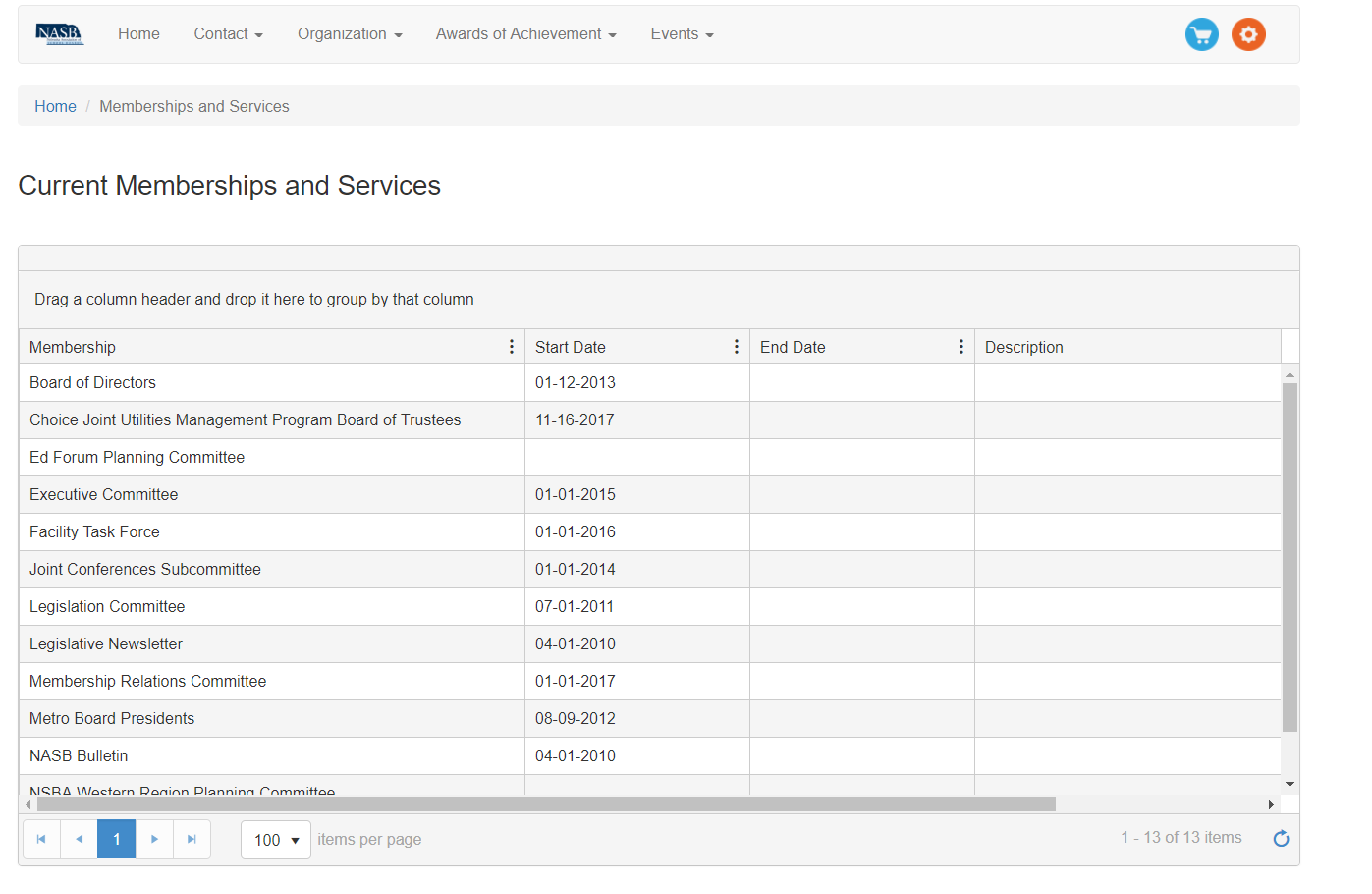
1. This page brings up your school district’s information. You will notice that this is only an informational page and you are not able to edit any information on this page.

***Membership and Services Dropdown***

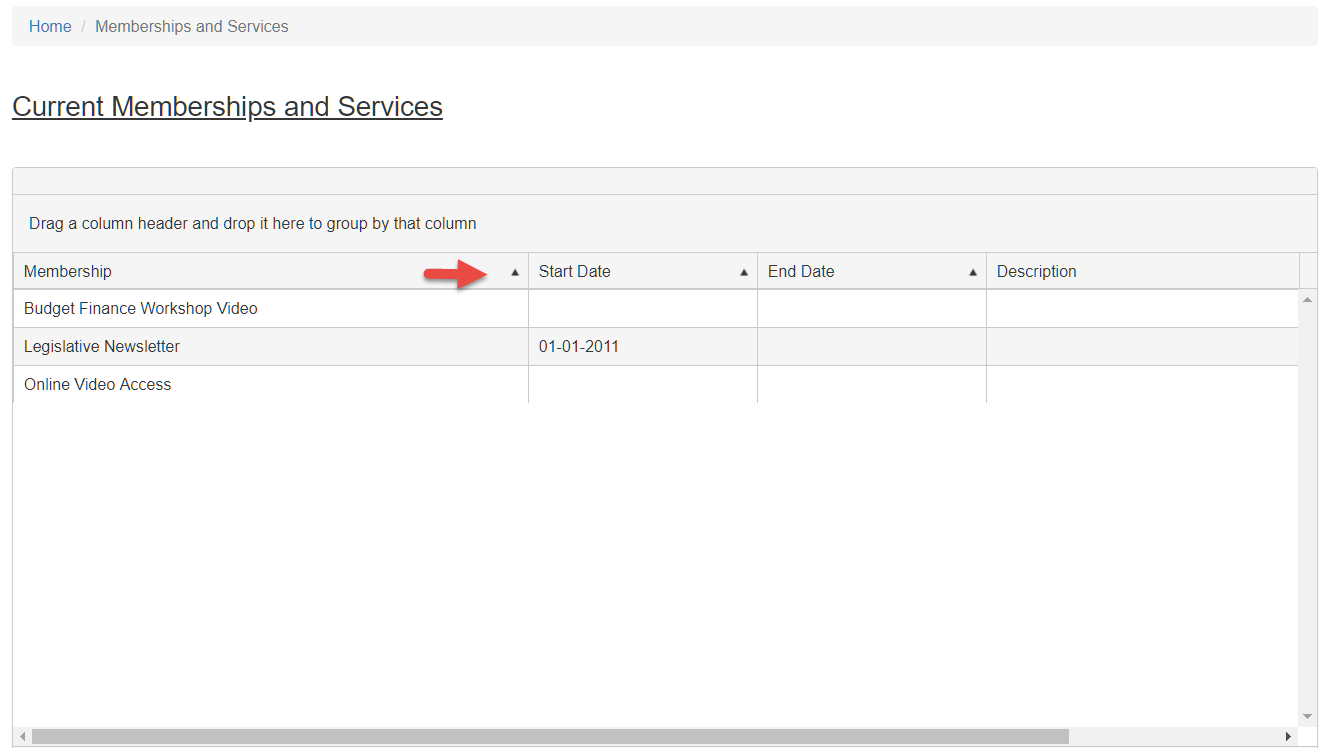
* Click on “Contact” and then select “Memberships and Services”



1. This page displays all your current subscriptions, committee’s and any memberships you currently have.

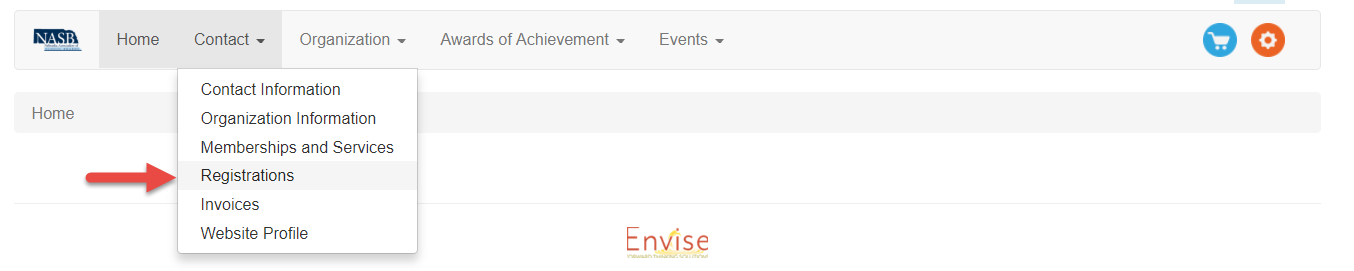


1. On this page you can sort each of these columns by clicking on the arrow to the right of the column heading and sort by ascending, etc.



***Registrations Dropdown***

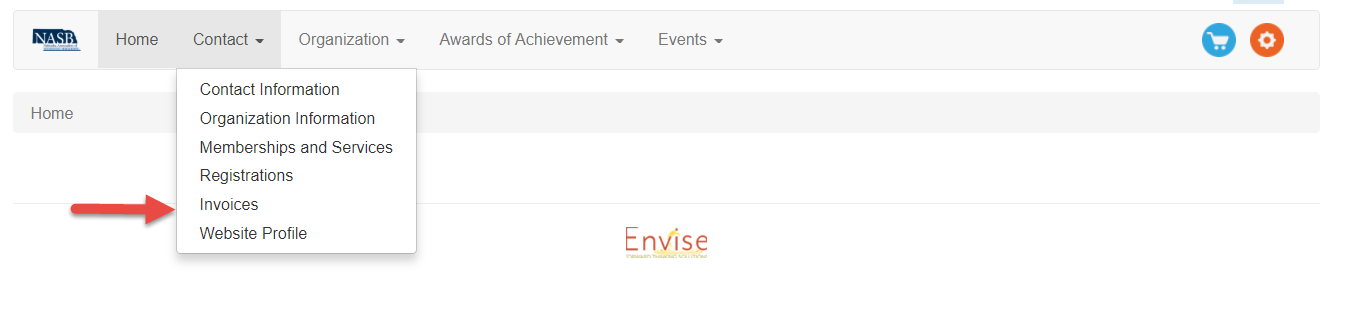
* Click on “Contact” and then select “Registrations”



1. This page displays all your “Event Registrations” that you are registered for.
2. You can export to excel by simply click on “Export to Excel”.

***Invoices Dropdown***

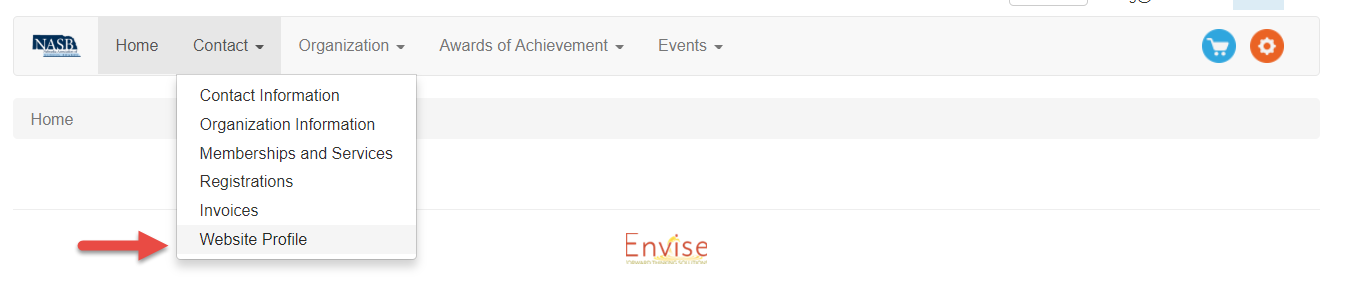
* Click on “Contact” and then select “Invoices”



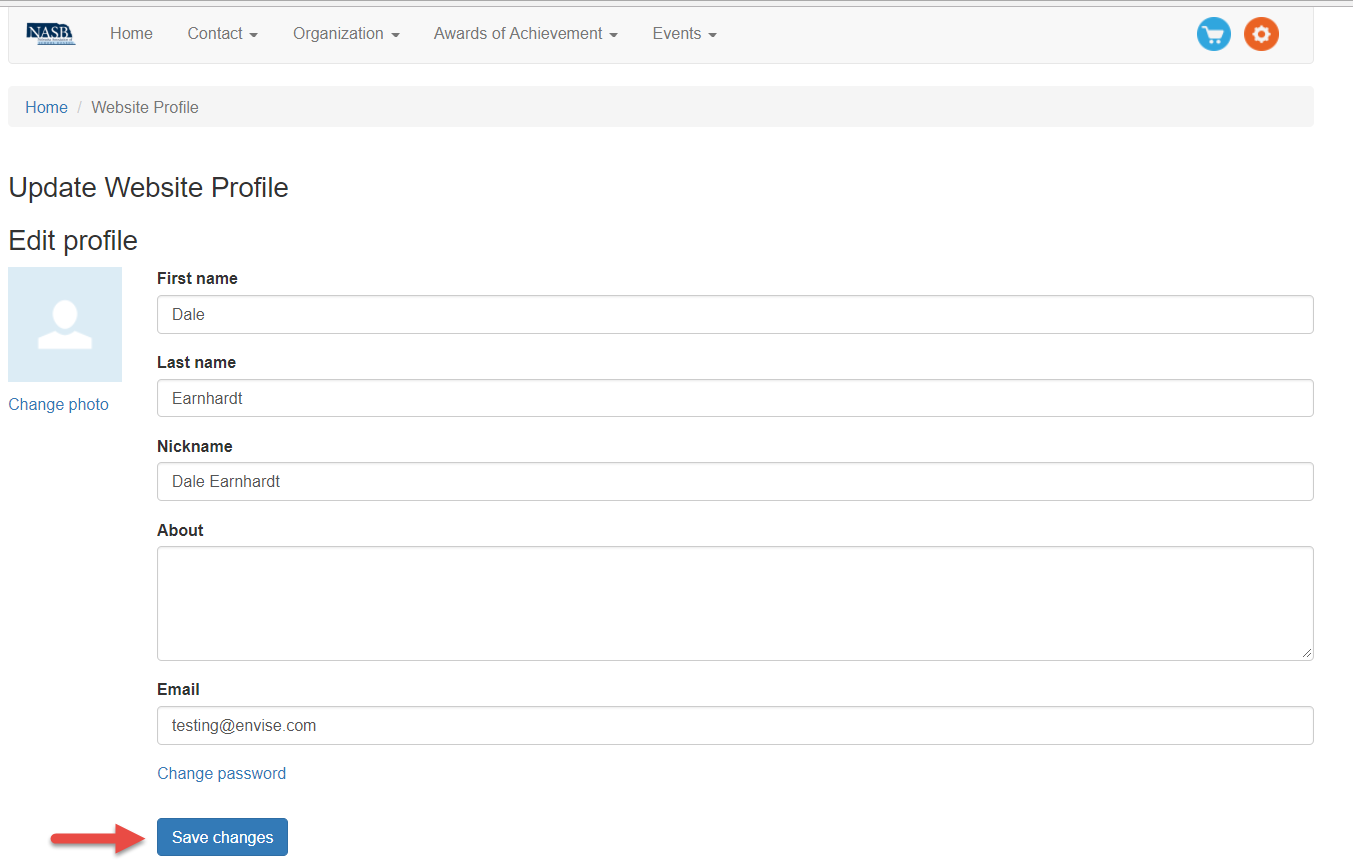
1. This will populate any invoices you currently have for registrations.
2. You have the option to “Export to Excel”.

***Website Profile Dropdown***

* Click on “Contact” and then select “Website Profile”



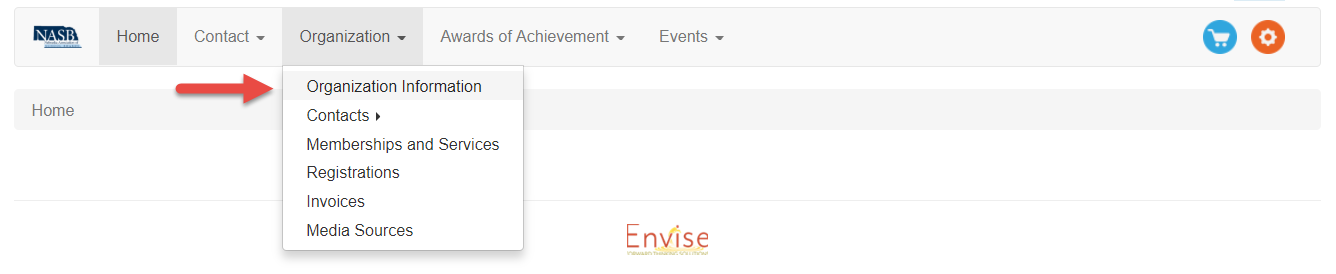
1. This page displays your website profile. Here you can add a photo and make changes to your name and email address. **\*\*\*Please keep in mind this page does not make changes to your contact record in our system, this is just your website profile\*\*\*.**
2. You can also change your password on this page by simply clicking on “change password” highlighted in blue. Once you’ve updated your password click the “Save changes” button.



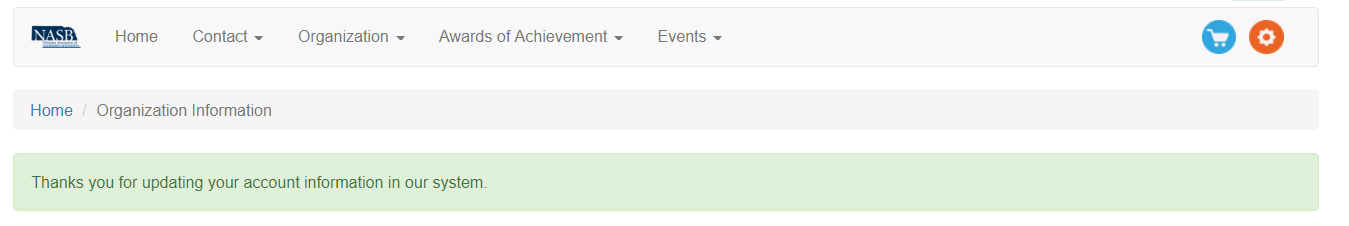
**Organization Tab**

***Organization Information Dropdown***

* Click on “Organization” and then select “Organization Information”

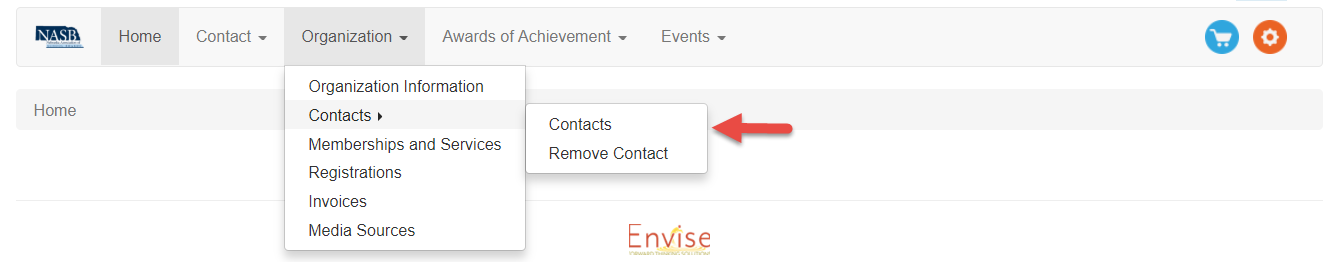


1. This page displays all the general, school, board meeting and legislative information.
2. Please take the time to review all this information and make sure it is accurate. If you have any changes to make, please make the changes and hit “submit” at the bottom of the page.
   1. If you need to make changes to a phone number, please enter as xxx-xxx-xxxx.
3. **Please note that some fields are not editable.**
4. Once you hit “submit” scroll up the page and a message stating “thank you for updating your account information in our system” will be displayed.



***Contacts Dropdown***

* Click on “Organization” and then select “Contacts” and then select “contacts”

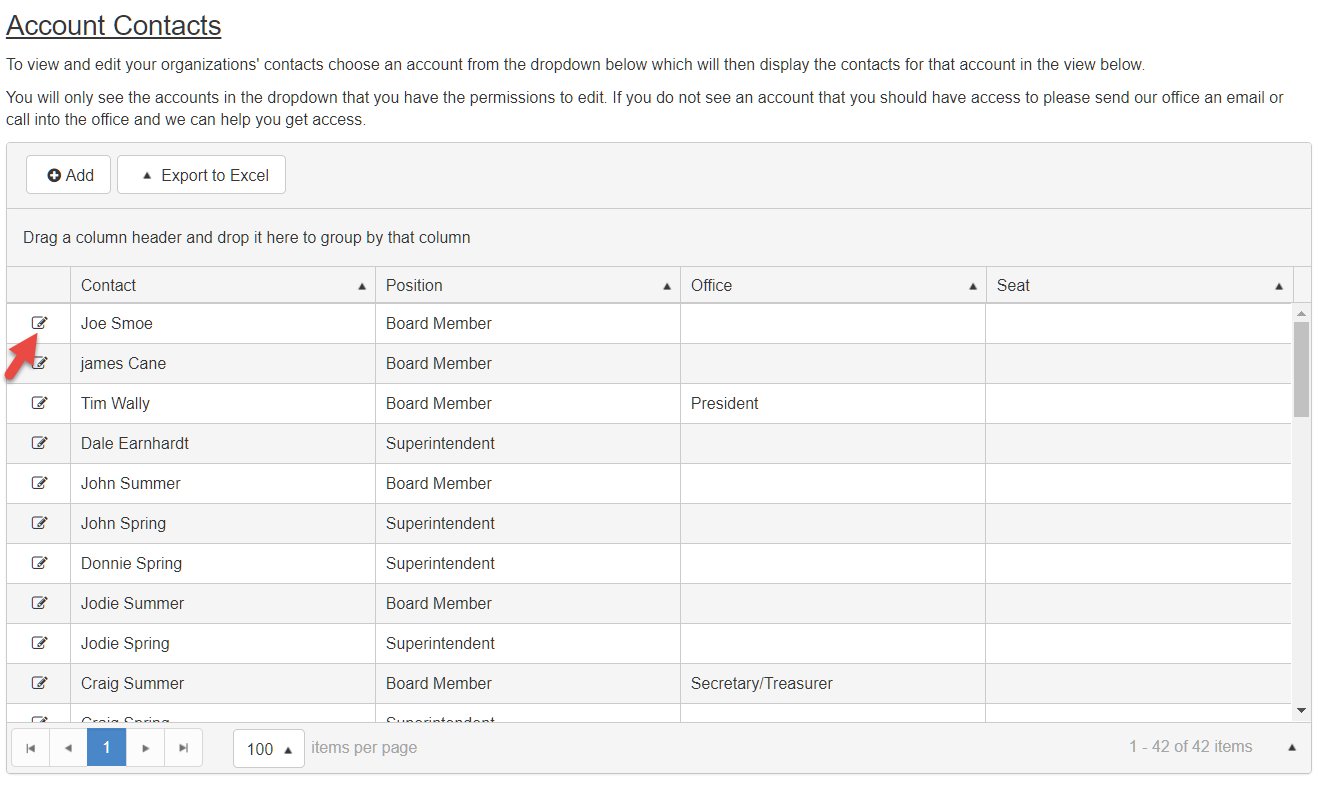


1. This will populate in all your contacts for your school district.
2. **Note**: If you are a shared Superintendent, please navigate to the upper left hand corner to choose your school district and this will populate in your contacts.



* 1. **If you are not able to see a listing of all your contacts for the school district, please let us know and we will change your permissions.**

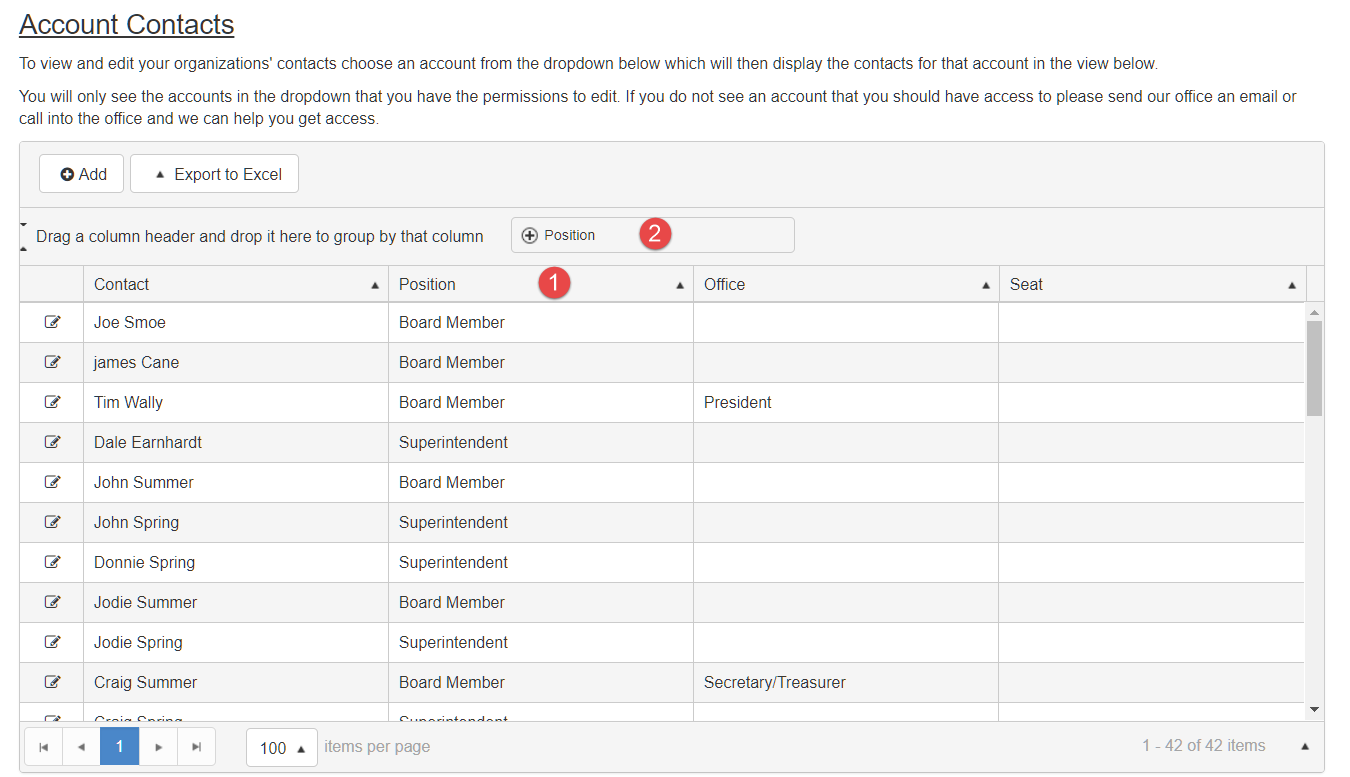
1. The pencil mark icon to the left of each of your contacts names allows you to update the account contact by simply clicking on that icon.



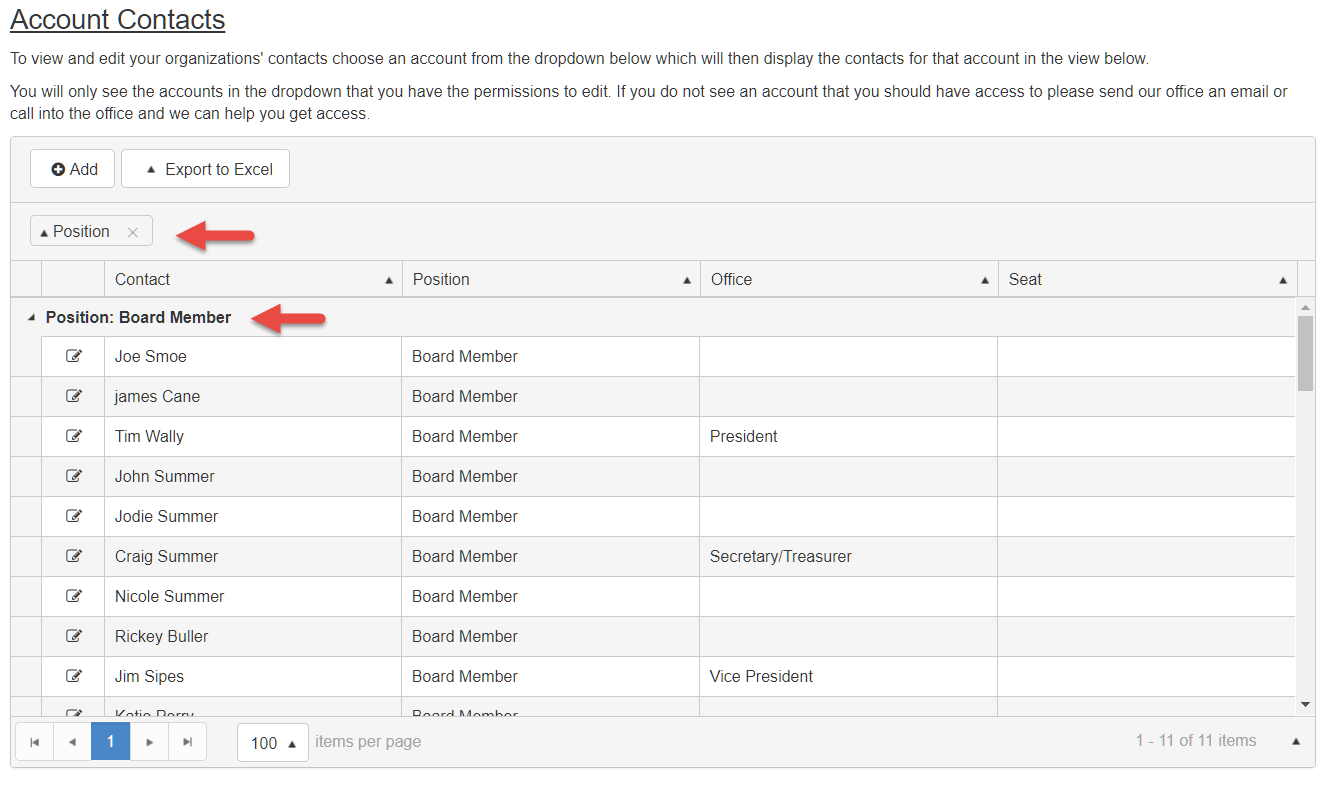
* 1. A new screen will pop up for you to make changes and scroll down to the bottom and hit “submit” when you are done.
     1. Notice you can make changes to their “Position Title”, “Board Office” and “Begin Date” by using the drop-down menu.



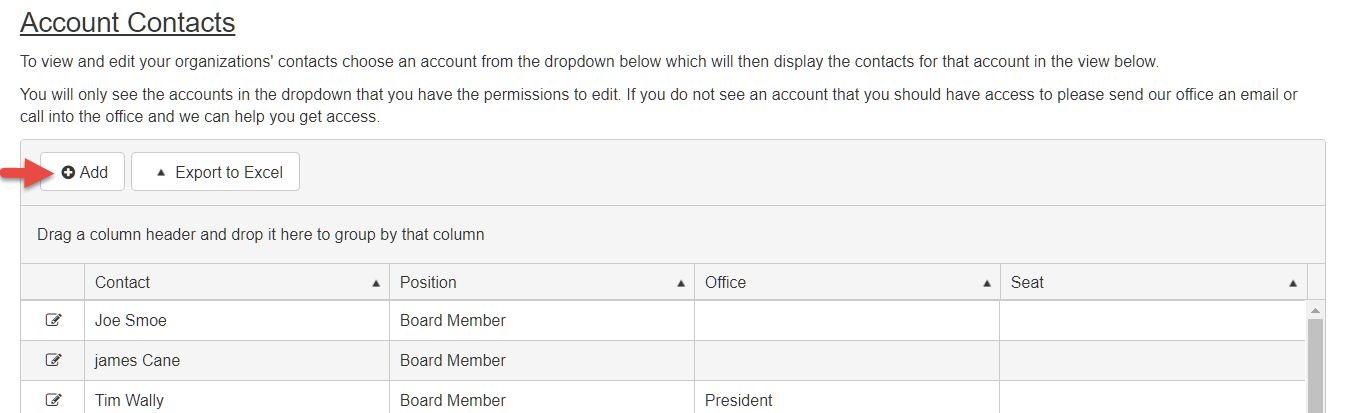
1. We now have a new option where you can group this view by simply dragging the column headers and moving them.
   1. For example, let’s say you want to group by “Position”. Simply click on “Position” in the column heading **and drag** it to the area where it says, “Drag a column header and drop it here to group by that column”.



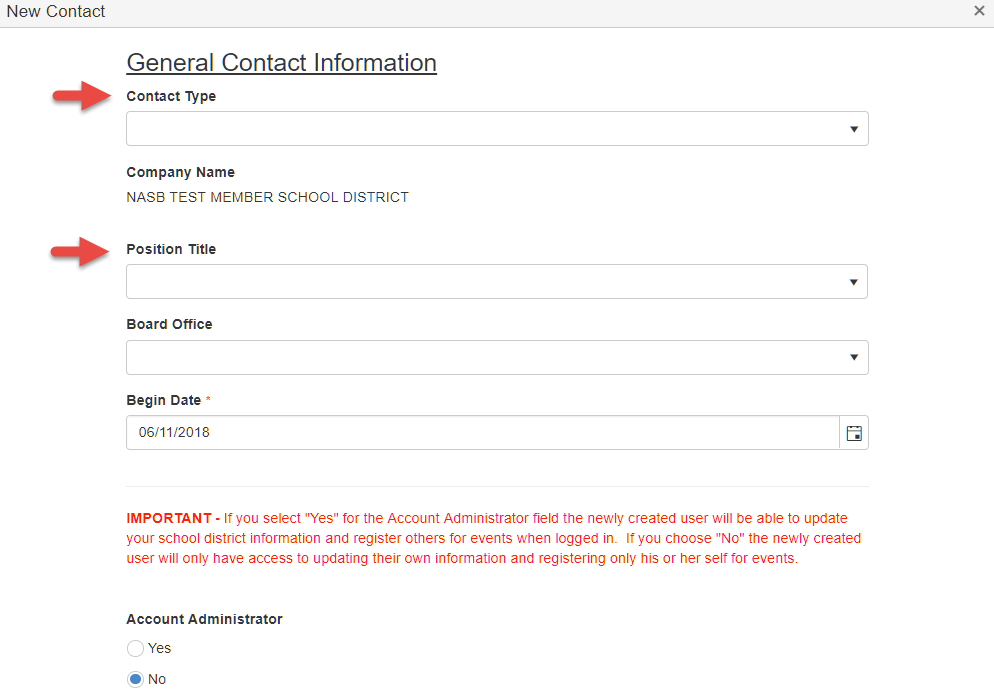
* 1. Now you will notice that your screen is grouping all your contacts by “Position”. You can drag more than one column heading and it will sort in the order that you drag the columns to the top.



1. You can also export these contacts into excel by clicking on “Export to Excel”.
2. This page is where you can also add new contacts. Simply click on “Add”.
   1. A new screen will populate to input all your information for the new contact.



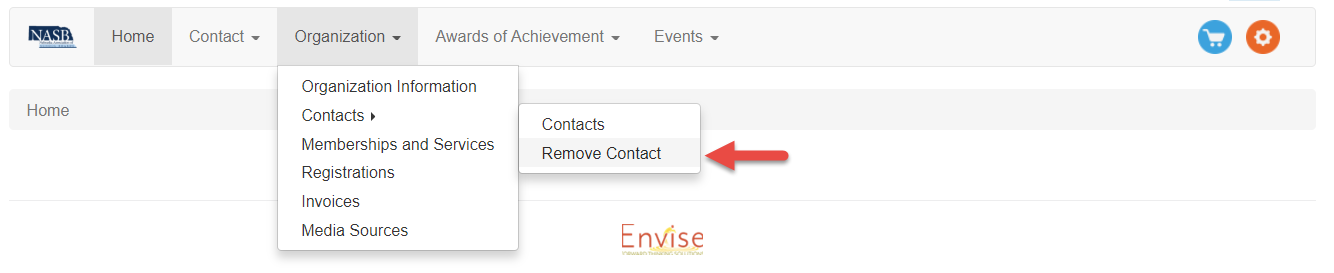
* 1. You will see that you must select from the drop-down menu “Contact Type” and “Position Type”. All other fields are text fields. Hit “submit” at the bottom and you will now see that your new contact has populated in to your list of contacts for your school district.



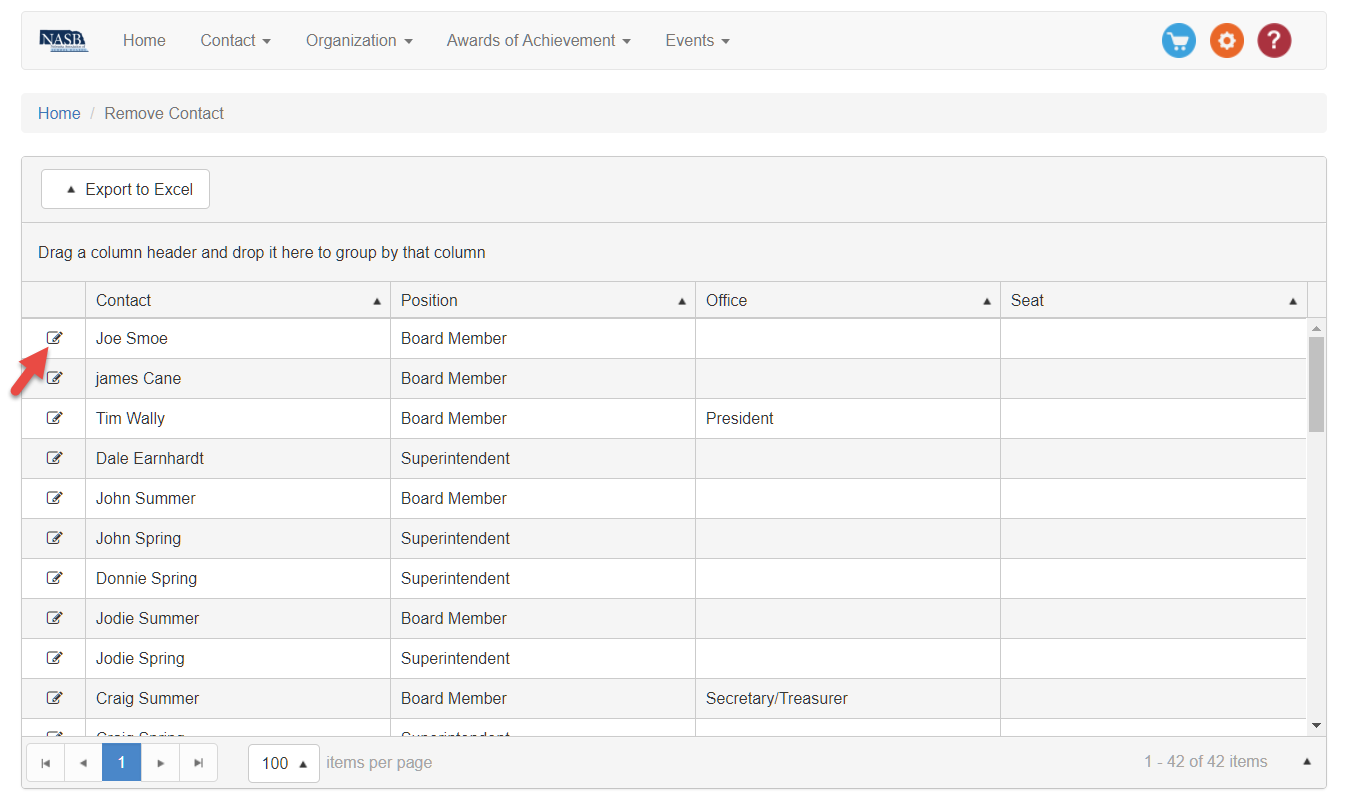
* 1. **Please note any fields marked with an \* are required fields**.

***Contacts Dropdown***

* Click on “Organization” and then select “Contacts” and then select “Remove Contact”. **This option you need to only access if you need to delete a contact from your school district.**



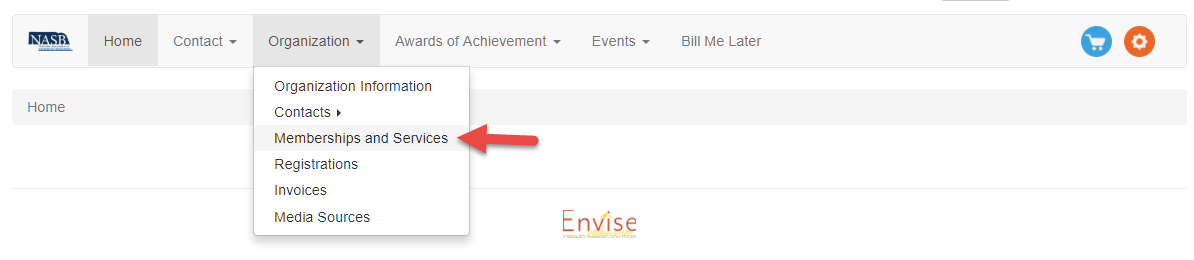
1. All your contacts will populate down below.
   1. **If you are not able to see a listing of all your contacts for the school district, please let us know and we will make a change to your permissions.**
2. To remove a contact, select the pencil mark icon to the left of the contacts name. This will bring up a new screen where you enter in the “Term End Date” and hit “submit” when done.



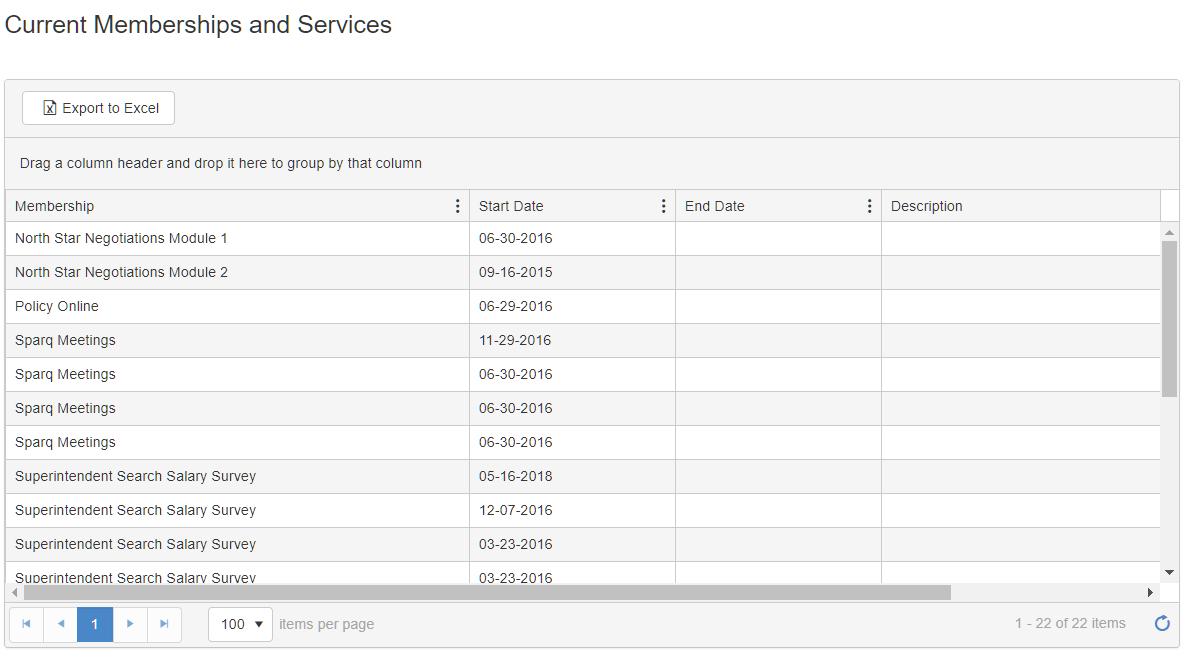
1. You will notice that your contact has now been removed.
2. The option to “Export to Excel” is still available and you can also do the grouping of the column headers here as well. See above instructions on how to group.

***Memberships & Services Dropdown***

* Click on “Organization” and then select “Memberships and Services” from the dropdown**.**

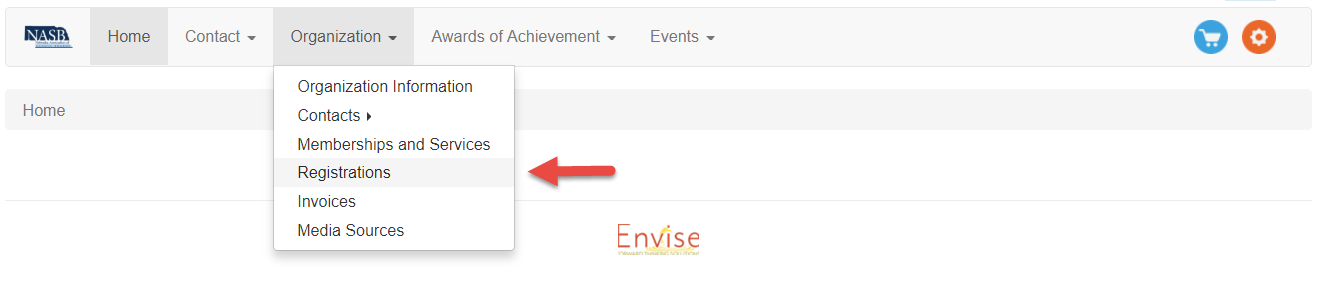


1. This brings up a listing of all your district memberships, services, etc.
2. You have the option to “Export to Excel”.

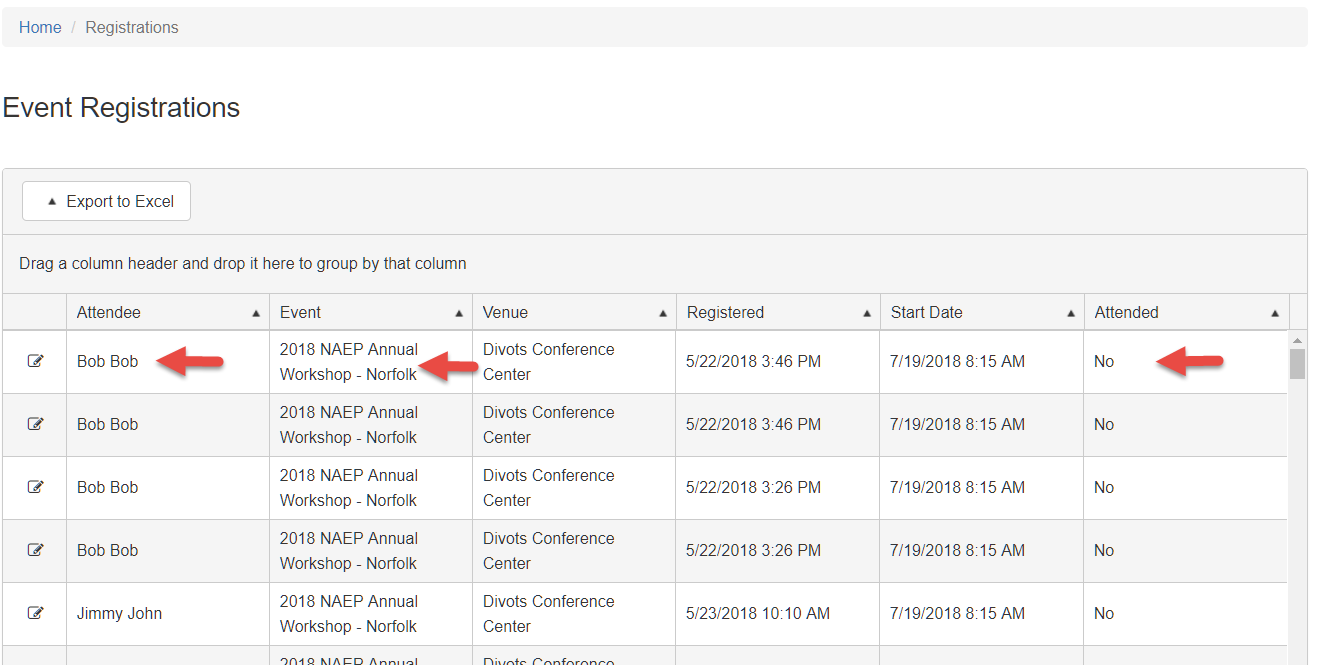


***Registrations Dropdown***

* Click on “Organization” and then select “Registrations”



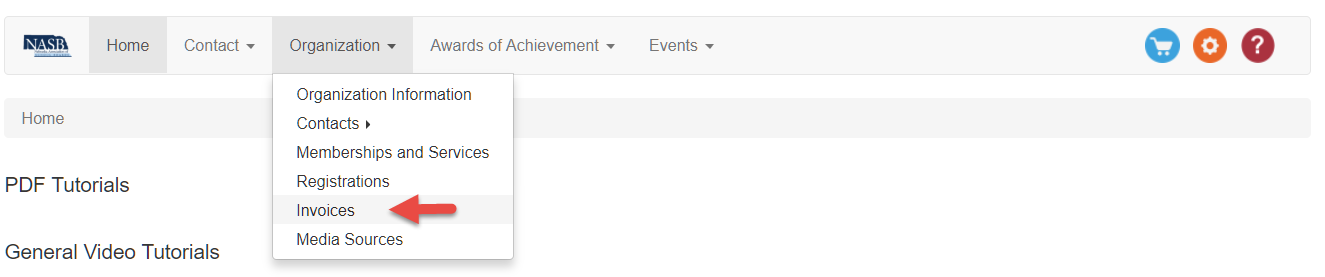
1. This will populate all registrations for all your contacts and if they attended or not.
2. Again, if you are shared Superintendent, please navigate up to the upper left hand corner and select from the dropdown the correct school district.



1. You can drag the columns to group by “Attendee”, “Event”, etc.
2. The “Export to Excel” option is also here as well.

***Invoices Dropdown***

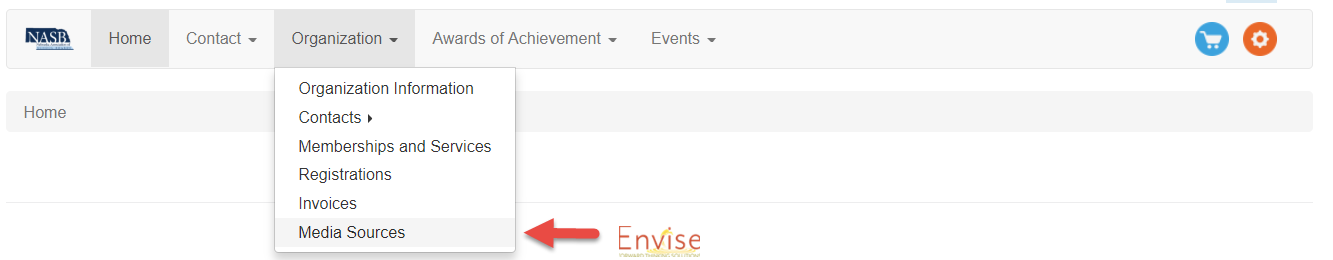
* Click on “Organization” and the select “Invoices” from the drop down.



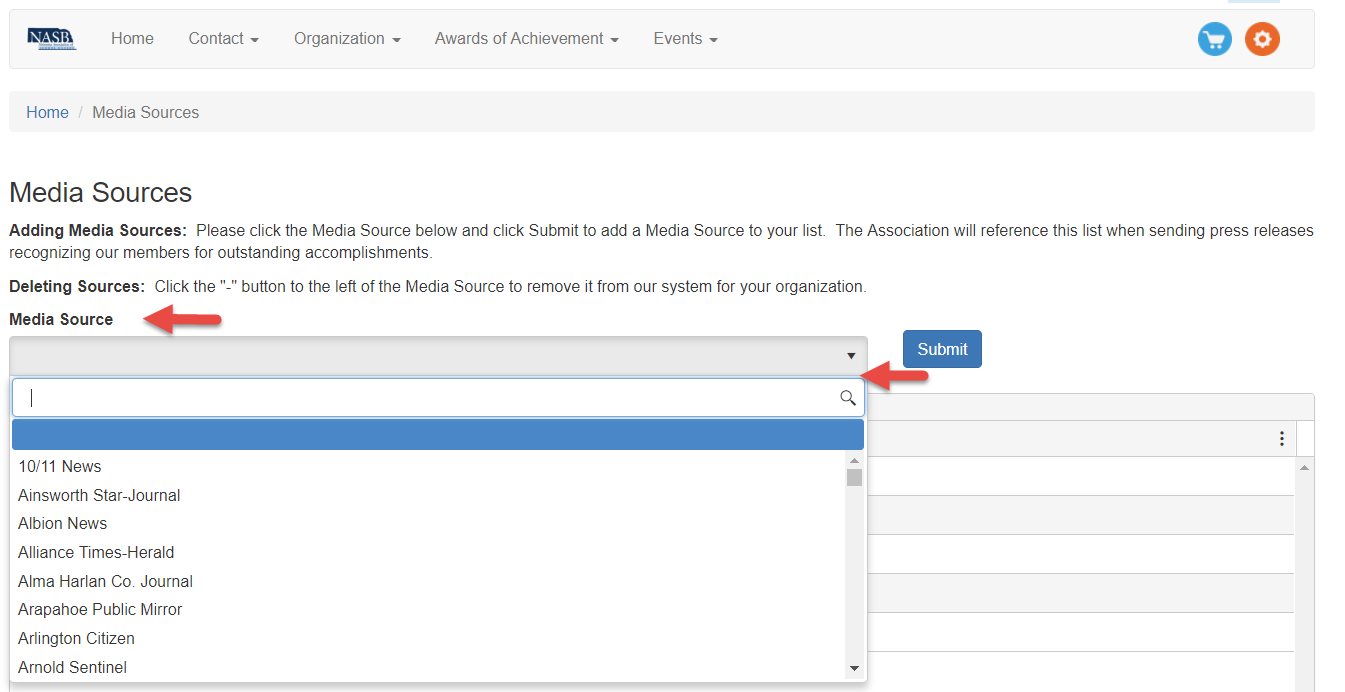
1. This will bring up a listing of your district invoices.
2. You have the option to “Export to Excel”.

***Media Source Dropdown***

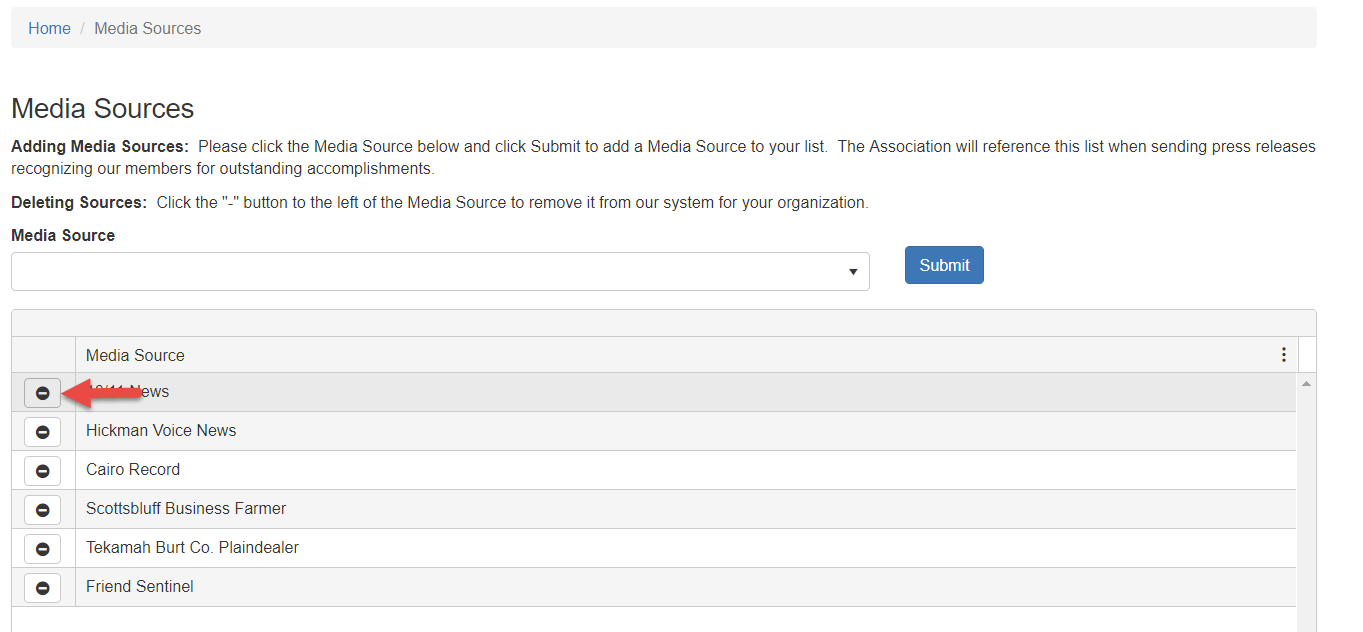
* Click on “Organization” and then select “Media Sources”



1. This gives a current list of your Media Sources in our database that we send press releases to.
2. To Add a Media Source: click on the drop-down menu under “Media Source” and scroll through the listing of Media Sources and hit “Submit” when you have selected the Media Source you would like to add.
   1. The new Media Source will now be populated in your current list.



1. To Delete a Media Source: click on the “- “button to the left of the Media Source you want to delete.

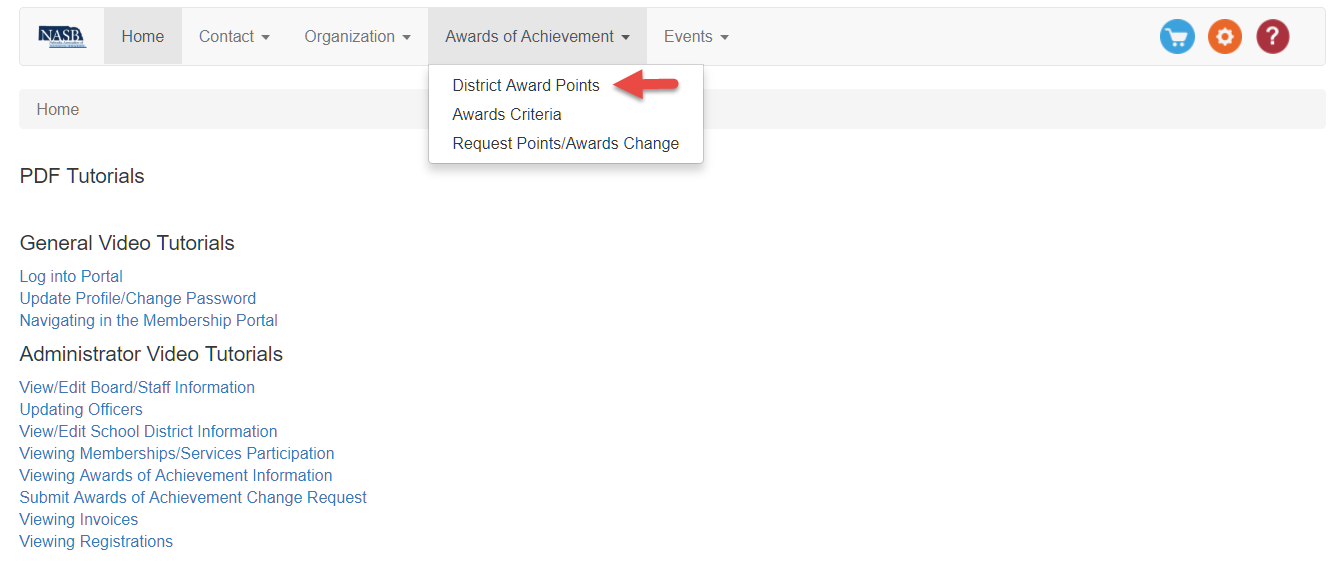


* 1. A message will popup stating – “Are you sure you want to delete this record?”. Hit “Ok” and now your media source will no longer be populated in your list.

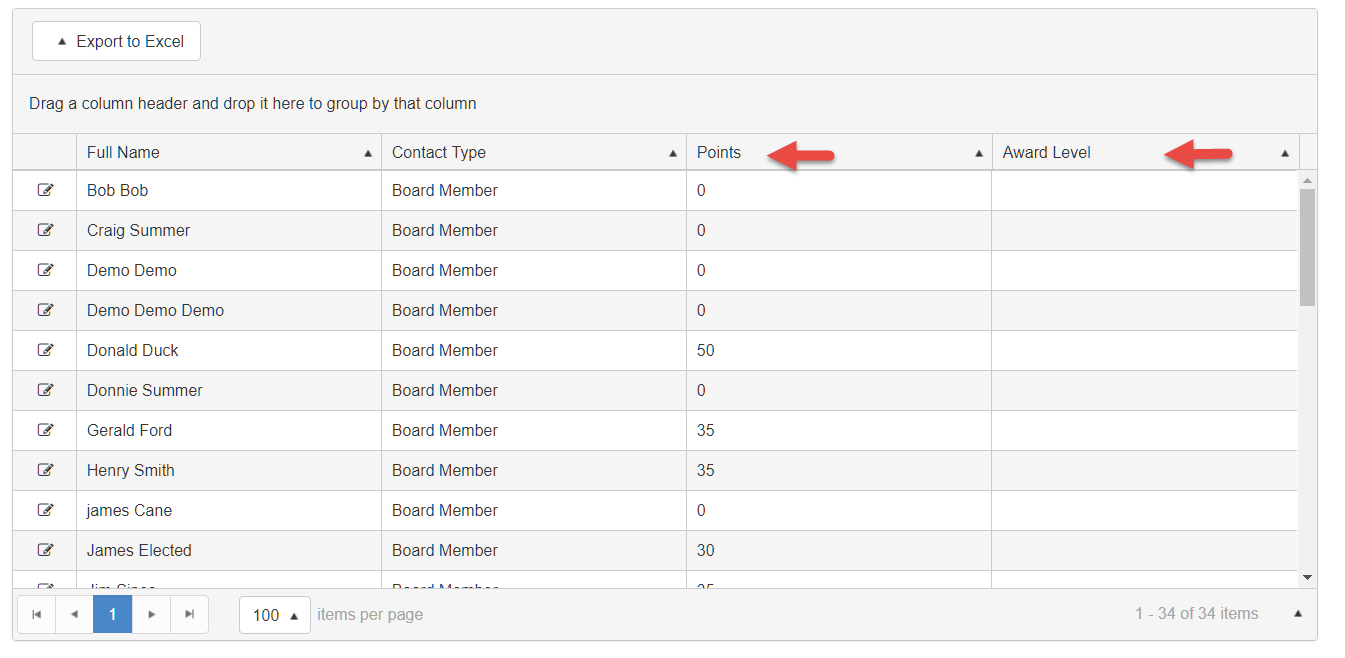
***Awards of Achievement Tab***

***District Awards Points Tab***

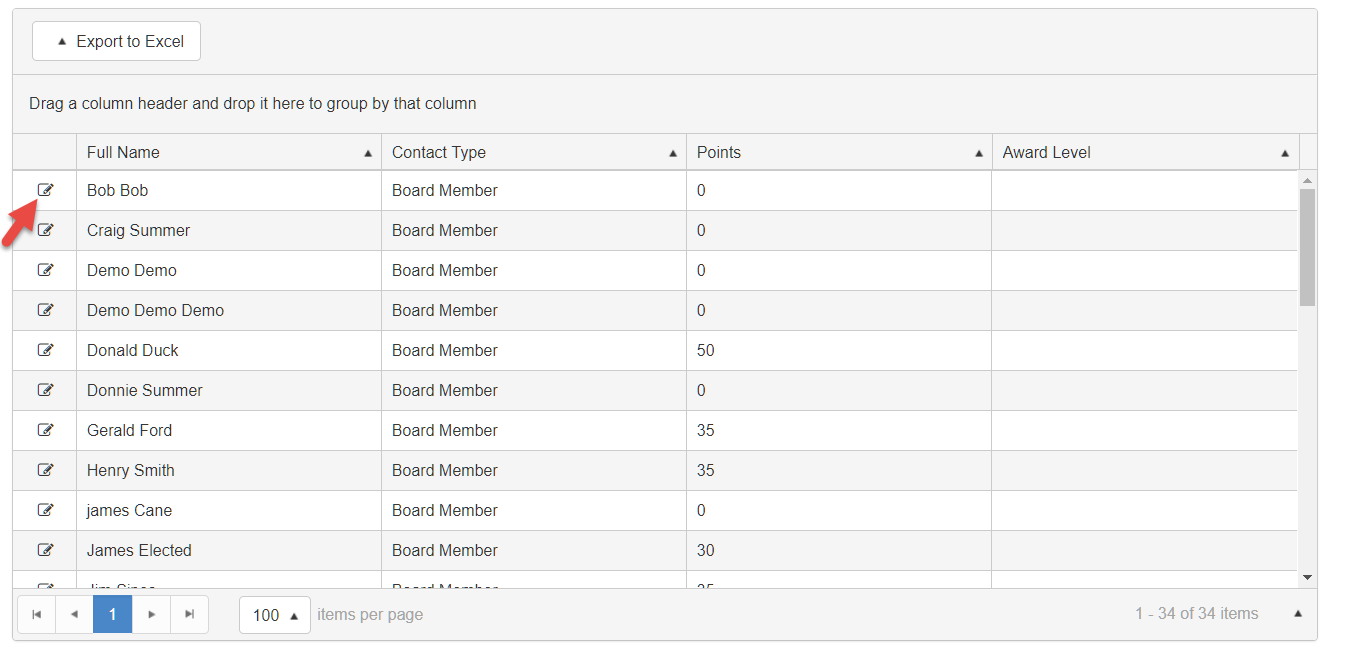
* Click on “Awards of Achievement” and then select “District Award Points”.



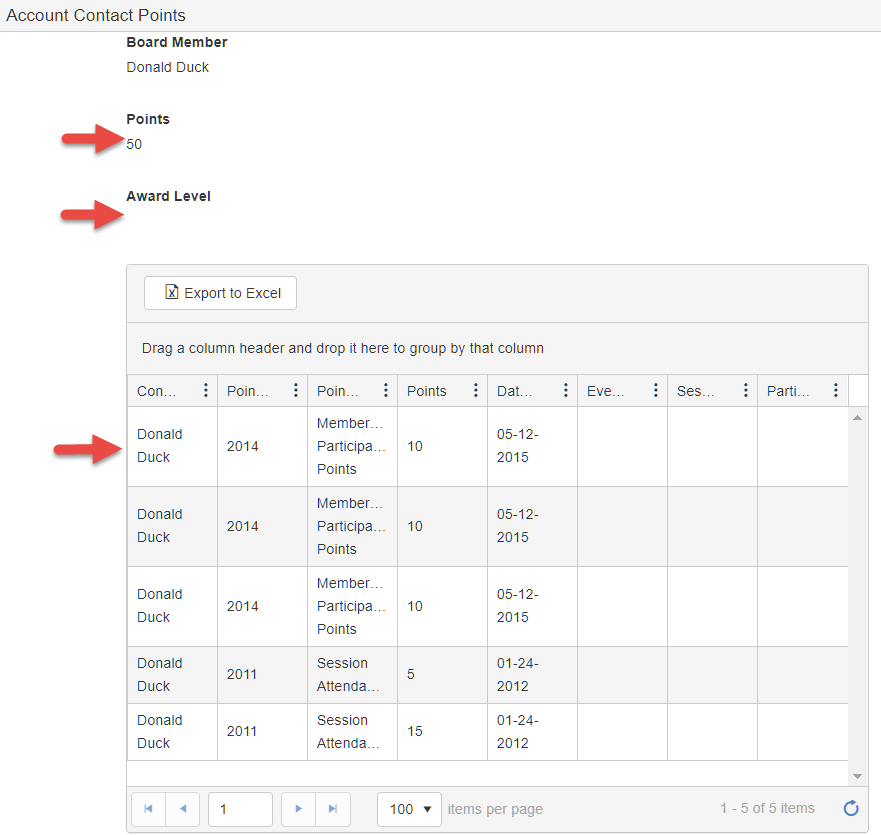
1. This will populate all your board members and their point and award levels they have earned.



1. Click on the pencil icon to the left of the board member’s name.

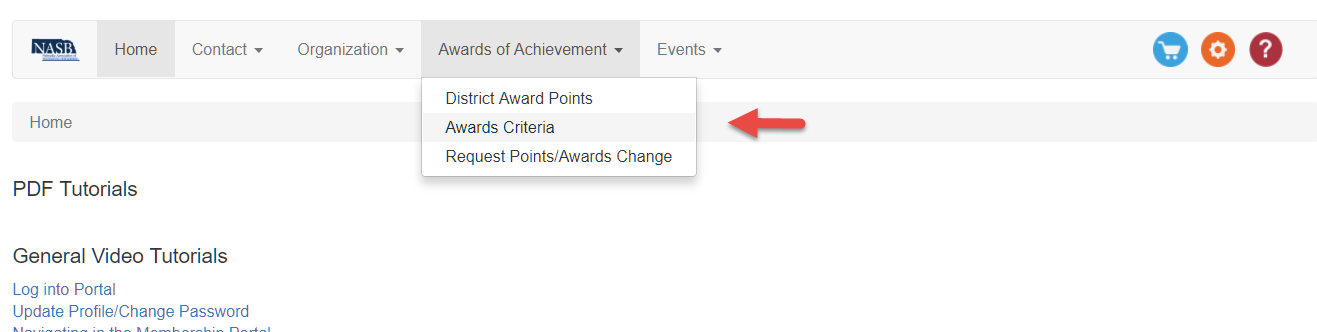


1. This page shows you a little more information on what award level they are on, what their point total is, etc.
2. If you scroll down the page more there is a graph at the bottom as well.



***Awards Criteria Dropdown***

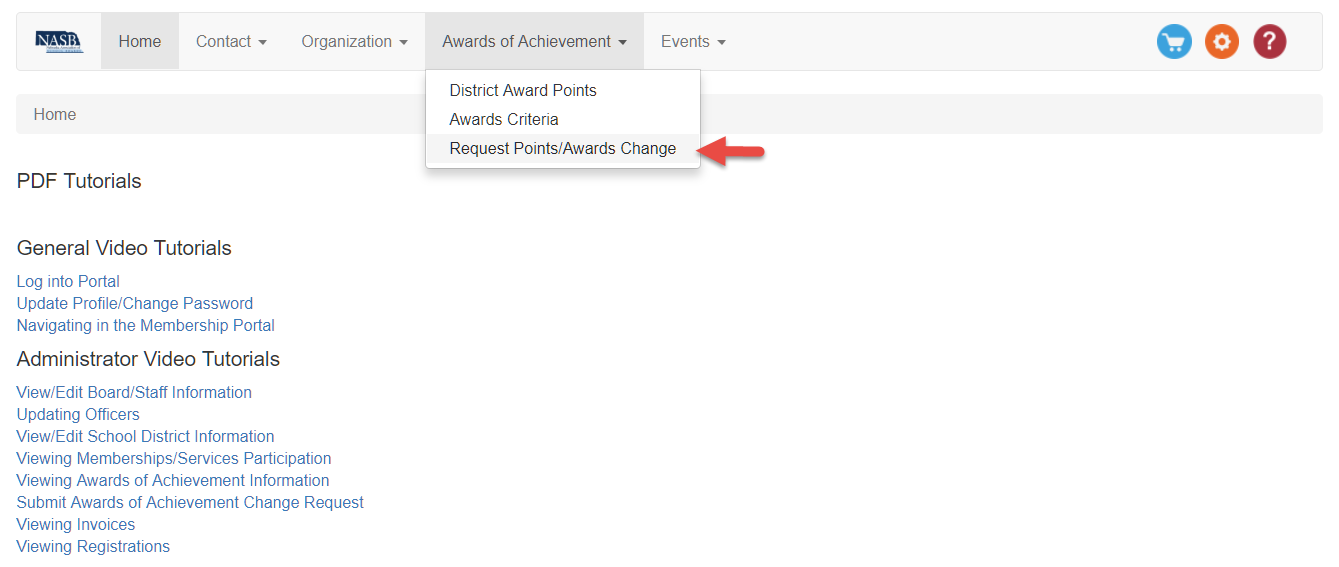
* Click on “Awards of Achievement” and then select “Awards Criteria”.



1. This will bring up a separate pdf document of what requirements are needed for receiving award points, etc.

***Request Points/Awards Change Dropdown***

* Click on “Awards of Achievement” and then select “Request Points/Awards Change.

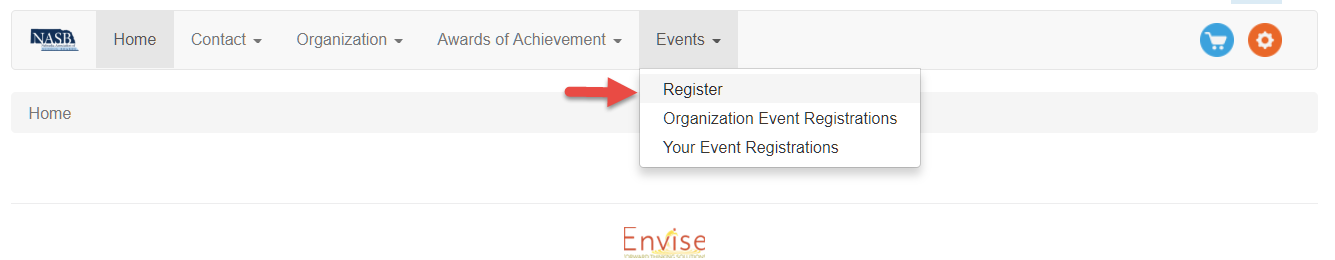


1. This tab is where you can request point changes and attach any supporting documentation. You have the option to upload more than one file as well.
2. Once you are done hit “Submit” at the bottom of the page and your submission will be submitted to NASB.

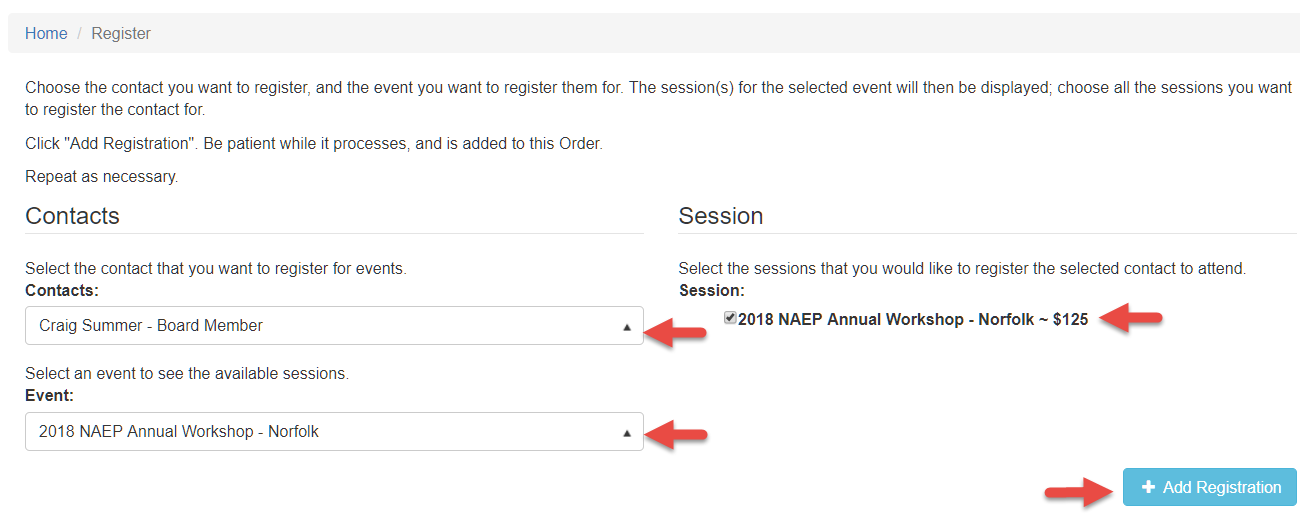
***Events Tab***

***Register Dropdown***

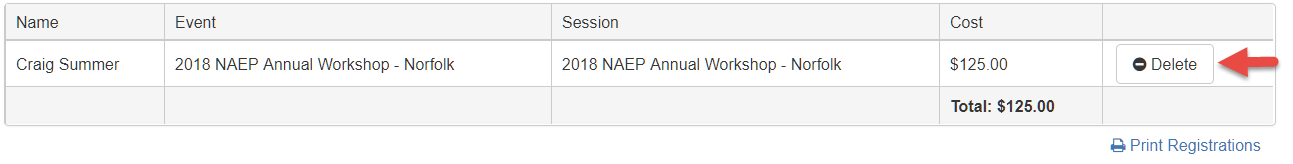
* Click on “Events” and then select “Register”



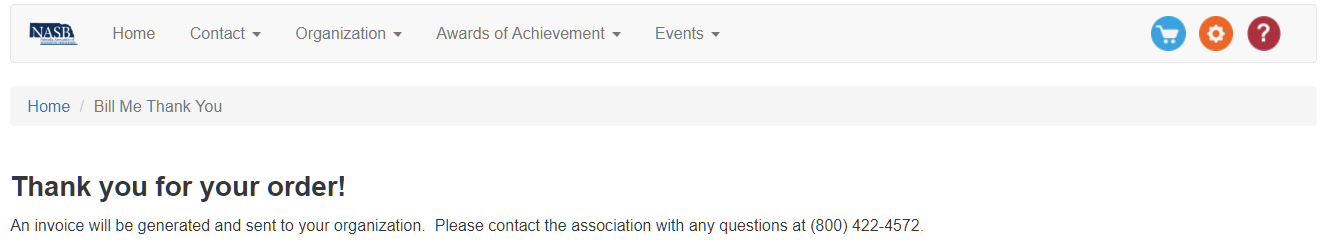
1. Please select the contact you need to register under the “Contacts” drop down menu and then select which event you need to register your contact for from the “Events” drop down menu.
2. You will see the session popup on the right-hand side under “Session”. Please select the session you want to register for and then hit “Add Registration”.
3. Again, if you are a shared Superintendent, please select from the drop down in the upper left-hand corner your correct school district you need to add registrations for.



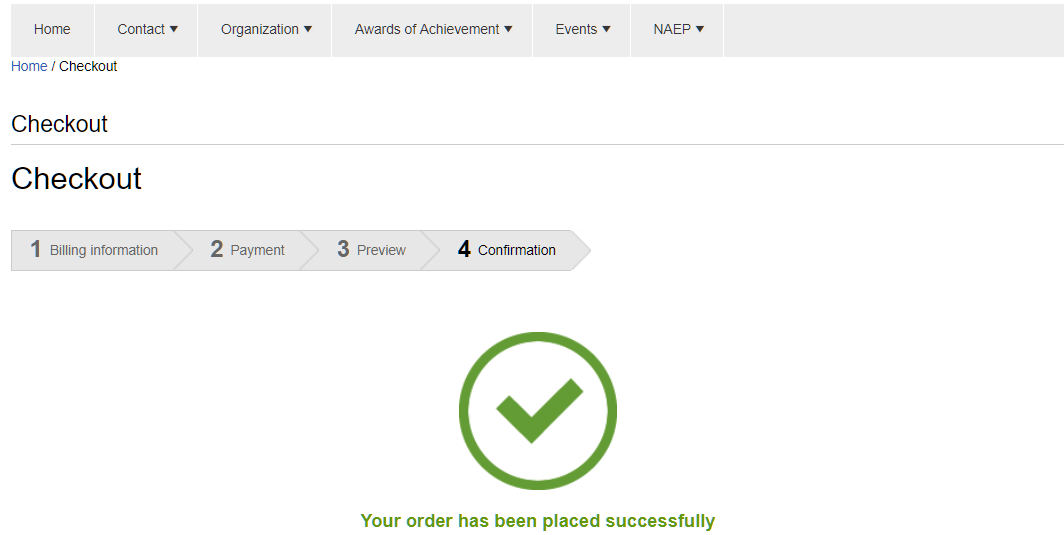
1. You will notice your registration populates down below with a total amount and what session and event you choose. If you need to delete your registration and start over, just select the “Delete” button and this will delete your registration.



1. Continue this process for each member you need to register.
2. Once you’re done registering your contacts, select your payment method, “Credit Card” or “Bill Me Later” and hit “Continue”.
3. You have the option to print your registrations, hit “Print Registrations” in blue.
   1. If you choose “Bill Me Later”, you will receive the following message and that is all you need to do.

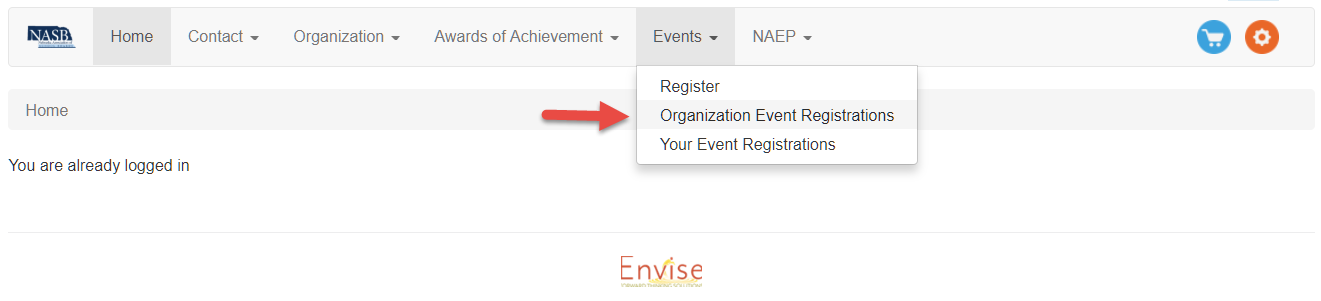


1. If you choose “Credit Card”, you will now be directed to our shopping cart and you will see an event registration in your shopping cart with an invoice number.
2. Once you have verified your information, click “Checkout”. This will take you to the next screen to enter your billing information and payment.
3. Once you get to the payment tab, verify your information, and then hit “Place Order”.
4. You should receive the following message, “Your order has been placed successfully”.

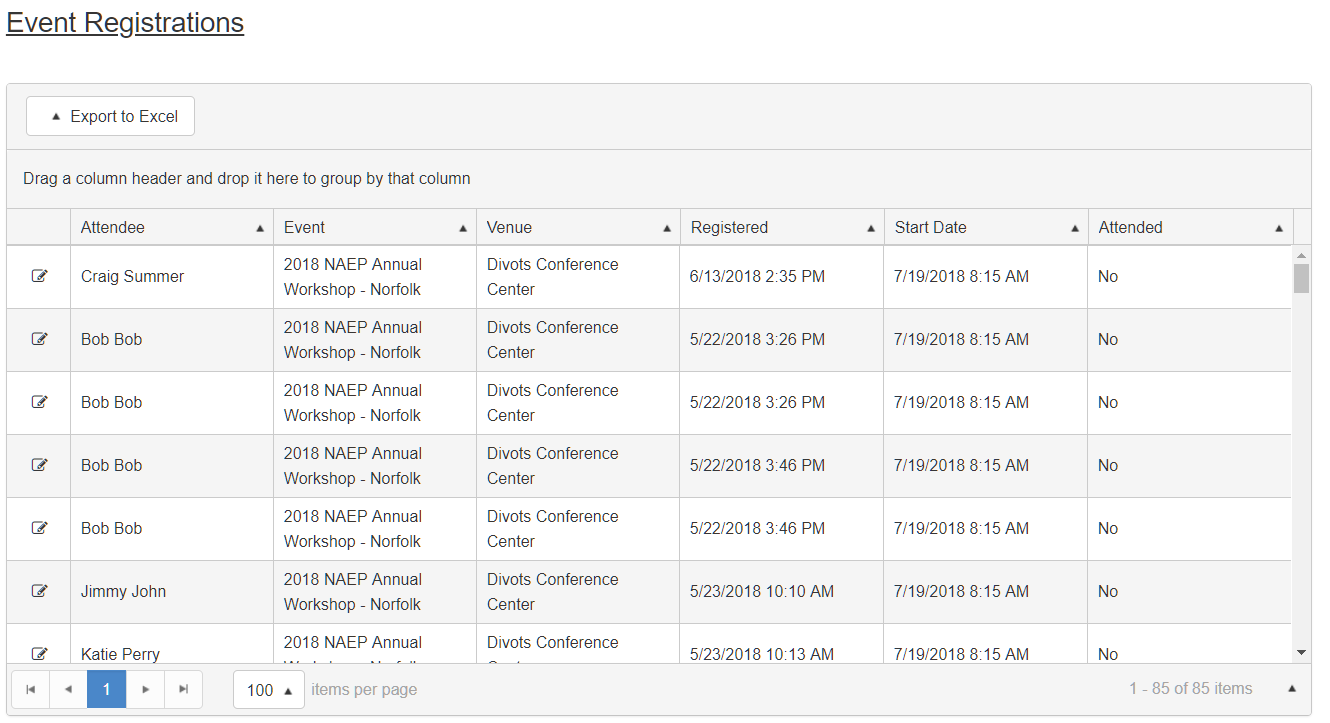


***Organization Event Registration Dropdown***

* Click on “Events” and then select “Organization Event Registrations”.



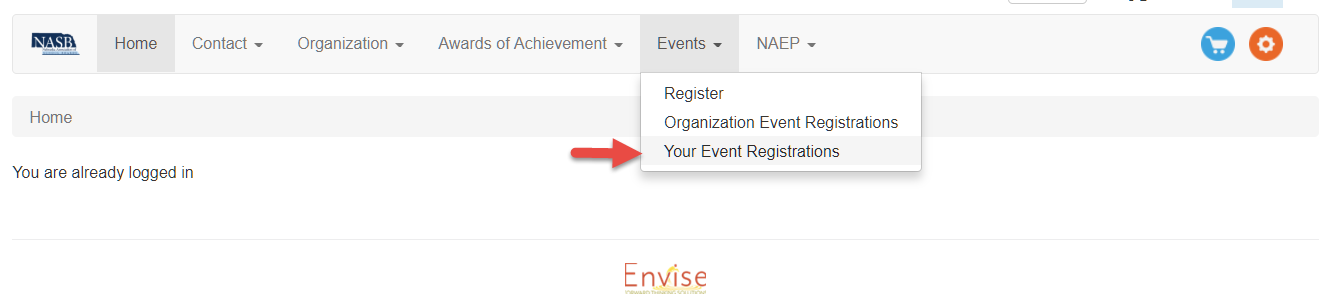
1. This page will display all your contacts that are registered for an event.



1. You can “Export to Excel” and seen above and you can also drag the column headings again to group by “Event”, “Attendee”, etc.

***Your Event Registration Dropdown***

* Click on “Events” and then select “Your Event Registrations”.



1. This brings up a listing of your current registrations that you are registered for.

