Membership Registration System

Chapter Advisor

User Manual

register.bpa.org

Important MRS Notes

- [Google Chrome](#) 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 BPA Support by emailing support@bpa.org or calling 614-895-7277.

Login Instructions

Advisor Login

Chapter ID / Membership ID / Email / Username:

Membership ID

Password:

Password

Login

Forgot Password

Important Notes

If you serve as the local advisor for multiple membership divisions and have multiple logins, **you MUST use your login credentials associated with your Secondary Division.**

For brand new advisors, you will use the membership system auto-generated login credentials that were sent to you via email.

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1. Visit: [register.bpa.org](#).
2. For returning advisors, your login credentials from the previous membership year will allow you to access the system.
3. For new advisors, please use the login credentials that were emailed to you.
4. Enter your "**Username**" in the "**Chapter ID / Membership ID / Email / Username**" field.
5. Enter your "**Password**" in the "**Password**" field.
6. Click on the "**Login**" Button
7. If you were able to login successfully jump to page three (3).
8. For additional login assistance jump to page two (2).

*Instructions on how to complete the "Graduation and Rollforward Process" jump to page 30.

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:

User Name

Email:

Email

Reset My Password

1. Enter your "**Username**" in the "**Username**" field.

2. Enter your "**Email Address**" in the "**Email**" field.

3. Click on the "**Reset My Password**" Button.

Notes

If an account is found that matches the Username and Email Address on file, you will receive an automated email with your new temporary password.

If no account is found contact National BPA at:
support@bpa.org

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**."

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 (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.
   ***Note:** Not all tabs may be visible. Hidden tabs can be found by selecting the drop-down arrow on the far-right of the Tabs line.

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.
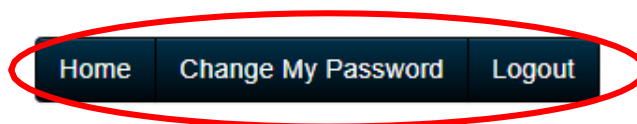
Action Buttons

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.

Action Buttons → Home | Change My Password | Logout
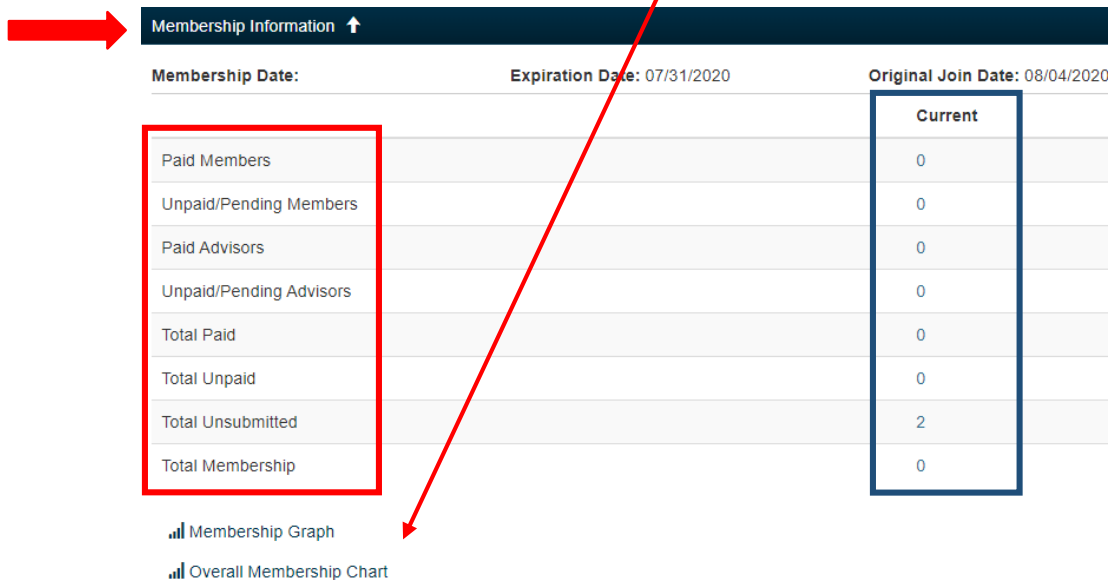
Tabs → States | Manage | Utilities | Accounting

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
📊 Overall 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

| Students | Chapter Information | Chapter Advisor(s) | Conferences | Invoice History | Quick Links | State Information | Resources | E-Store | ▾ |

| Add Students | Membership Download | Students With Access To Portal | Print Membership Cards | Print Membership Certificates | Previous Year Count |
| Reset All Students' Passwords | Email All | Submit Membership |

To place student members on an invoice you can select them individually by checking the box next their name or use the **Select All / Deselect All** button below.

| Select All / Deselect All | Delete Selected | Show Inactive |

Show [All ▾] entries   Search: [_____]

	Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
⊕	PENDING		00007533	Test	John	Male	11	08/30/2021	6212	✎	⋮	
⊕	MEMBER		00040818	Smith	Samuel	Male	10	08/30/2021	6213	✎	⋮	
⊕		☐	00040817	Dough	Jane	Female	11			✎	⋮	✖

Showing 1 to 3 of 3 entries

Previous [1] Next

1. Click on the "**Student**" Tab.

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

The "**Membership ID**" number will be a unique 8-digit number and will 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.
- **Edit** = Click the "**Pencil**" icon under the "**Edit**" column to edit the Student Member Information.
- **More Options** = Click on the " **:** " icon next to a student record to request a "**Name Change**", reset the student's password, import Torch Awards information from the previous year, and view their conference results.
  - 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.

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 Ethnicity"** from the **"Ethnicity"** field drop-down list (optional).
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 (optional).
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.
5. 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 Member CSV Entry

Incomplete information entered on this screen will not be saved if you do not complete the process fully.

Download CSV Template   Save   Export 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
1																

- 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.
  - o 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.
  - o 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.

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 **membership@bpa.org** 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	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
➕ PENDING		00007533	Test	John	Male	11	08/30/2021	6212	✏️	⋮	
➕ MEMBER		00040818	Smith	Samuel	Male	10	08/30/2021	6213	✏️	⋮	
➕	☐	00040819	Hill	Jack	Male	11			✏️	⋮	✖
➕	☑	00040817	Dough	Jane	Female	11			✏️	⋮	✖

3. Click on the "**Submit Membership**" Button.

Reset All Students' Passwords | Email All | **Submit Membership**

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 State Advisor or National BPA at membership@bpa.org.
   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.

Pay Or View Invoice(s) Now? ✕

View Invoice(s) ⬅

Pay Invoice(s) ⬅

Pay Invoice(s) Later ⬅

Close

> **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).**

How to Change a Submitted Student Name

1. Click on the " ⋮ " icon under the "**More Options**" column of the Student you would like to submit a "**Name Change**" request on.
2. Select the "**Request Name Change**" option.

Current Name

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
	Betty		White	

New Name

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
Select...	Beatrice	Middle Name	White	Select...

Reason For Change:

Student wishes to use formal first name rather than nickname

Save

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 " ⋮ " under the "**More Options**" 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.

Edit ⇅	More Options	⇅
✏	⋮	
✏	⋮	

[12]

How to Download a Membership Report

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

Add Students   Membership Download

1. Click on the "**Students**" Tab.
2. Click on the "**Membership Download**" Button.
3. Select "**PDF**" if you want the Student Membership Information displayed in a "**PDF**" file format **OR** Select "**CSV**" if you want the Student Membership Information displayed in a "**CSV (Excel)**" format.
   - The Membership Download displays both affiliated and Non-Affiliated Student Members.

How to View Students with Access to Student Member Portal

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

1. Click on the "**Students**" Tab.
2. Click on the "**Students with Access to Portal**" Button.
3. Select "**PDF**" if you want the Student Membership Information displayed in a "**PDF**" file format **OR** Select "**CSV**" if you want the Student Membership Information displayed in a "**CSV (Excel)**" format.

> **Students will not have access to the Student Portal until their Student Membership has been submitted.**

How to Print Membership Cards

1. Click on the "**Students**" Tab.
2. Click on the "**Print Membership Cards**" Button.
3. 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 Cards for **OR** click on the "**Select All / Deselect All**" Button to print "**ALL**" Student Membership Cards.
4. Click on the "**Print Membership Cards**" Button.

Select All / Deselect All   Delete Selected

Show 10 entries

Status	Select ⬇	Membership ID
	☐	00007494
	☐	00007493

> BPA Membership Cards are formatted for use with
> **Avery #5371 Micro-perforated White Business Cards**
> (10 per sheet)

How to Print Membership Certificates

1. Click on the "**Students**" Tab.
2. Click on the "**Print Membership Certificates**" Button.

Print Membership Cards   Print Membership Certificates

3. 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 Membership Certificates | Chapter Information | Chapter Advisor(s) | Conferences | Invoice History | Quick Links | Notifications | State Information | Resources | E-Store | Surveys |
| Email |

Back

Select/Deselect All

Show 10 entries   Search:

	Membership ID	Last Name	First Name	Member Type	Invoice Number
☑	14-0013-003440	White	Anne	Student	1245
☑	14-0013-003436	Dover	Janet	Chapter Advisor	1245
☑	14-0013-003437	Smith	John	Student	1246
☐	14-0013-003438	Jones	Sally	Student	1247
☐	14-0013-003439	Johnson	Jimmy	Student	1247
☑	14-0013-003442	Sue	Sally	Student	1249

Showing 1 to 6 of 6 entries

Previous **1** Next

Print Membership Certificates

How to View Previous Year Count

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! The default password is located under the Chapter Information tab.

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

Reset All Students' Passwords

How to Email All Student Members

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

1. Click on the "**Students**" Tab.
2. Click on the "**Email All**" Button.

| Previous Year Count | Reset All Students' Passwords | Email All |

3. The "**From**" field will be auto-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 the "**Send**" Button.

New Email ✕

Test Email:	☐
From:	Janet@gmail.com
Subject:	Subject
Attachments:	Choose File No file chosen

Type your email message here.

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.

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. Click on "**Graduating**" Accordion.
7. Complete "**Highest Grade Level for this Chapter**" and "**How to Graduate Your Student Members**."
8. Click on the "**Save**." Button.

> **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.

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 "🚫" icon under the "**Status**" column.

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

Date	Conference Attended / Community Service / Competitive Event Placement
Service Date	Subject

Details

Details

Home	Additional Pin Request	Change My Password	Logout		Membership Information ⬇

| 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 entries   Search:

Advisor	Type	Office Phone	Membership ID	Email	Cell Phone	Status	Years As A BPA Advisor	Invoice Number	History	Edit
Miss Janet Dover	Primary	(555) 666-1234	003436	Janet@gmail.com		✔	3	1245	History	✏

Showing 1 to 1 of 1 entries   Previous 1 Next

BPA Inc. Membership System

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
2. 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 | | | Membership Information ⬇ |

| 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 entries

Search: [   ]

Advisor	Type	Office Phone	Membership ID	Email	Cell Phone	Status	Years As A BPA Advisor	Invoice Number	History	Edit
Miss Janet Dover	Primary	(555) 666-1234	003436	Janet@gmail.com		✔	3	1245	History	✏

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 New Advisor**" Button.
3. Click on the "**User Information**" Accordion.
4. Complete "**User Information**" (all fields highlighted in **RED** are required).

| Add Existing Advisor | Add New Advisor | Email All |

User Information

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
Select...	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
Select...

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 existing Primary Chapter Advisor to a Secondary Advisor.

How to Email All Chapter Staff

1. Click on the "**Chapter Advisor(s)**" Tab.
2. Click on the "**Email All**" Button.

Add Existing Advisor | **Add New Advisor** | **Email All**

From: sallybooth@rmc.com

Subject: Subject

Attachments: Choose File No file chosen

Type your message here

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.

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

1. Click on the "**Invoice History**" Tab.
2. Click on the "**Pay Invoices**" Button.
3. Select the "**checkbox(s)**" located in the "**Pay All**" column on the left-hand side of the invoice that you want to pay.
4. 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.

| Pay Invoices | Historical Invoices | Invoice Payment History | Membership Statement |

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

| Students | Chapter Information | Chapter Advisor(s) | Conferences | Make Payment | Quick Links | Notifications | State Information | 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 Membership Dues Total: $10.00 Balance: $10.00 National Chapter Adviser Dues Total: $10.00 Balance: $10.00 Student State Dues Total: $5.00 Balance: $5.00 Chapter Adviser State Dues Total: $10.00 Balance: $10.00
☐	1247	06/03/2020	Middle Level Membership	Unpaid	Net 30	$30.00	National Student Membership Dues Total: $20.00 Balance: $20.00 Student State Dues Total: $10.00 Balance: $10.00
☑	1248	06/03/2020	Middle Level Membership	Unpaid	Net 30	$15.00	National Student Membership Dues Total: $10.00 Balance: $10.00 Student State Dues 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.

BPA Inc. Membership System

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
2. Click on the **"Membership Statement"** Button.

| Pay Invoices | Historical Invoices | Invoice Payment History | Membership Statement |

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.

| Chapters | Requests | State Staff and Permissions | Rates and Settings | Conferences | Accounting | Reports | Quick Links | Notifications | Resources | 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 expiration 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.

State Information Tab and Screens

1. Click on the "**State Information**" Tab

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 Resource Information

Chapter Resources

Resources in this section are available to all chapters through November 1, 2020. After this date, only affiliated chapters will be able to access these documents.

Show 10 entries   Search: _____

Item Name	Created	Download
Chapter Resource 1	05/26/2020	⊕

Showing 1 to 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.

| Chapters | Requests | State Staff and Permissions | Rates and Settings | Conferences | Accounting | Reports | Quick Links | Notifications | Resources | E-Store | Surveys |

Refunds

Chapter Items for E-Store

Show 10 entries   Search: _____

Item	Student	Student ID	Description	Price	Quantity	Select
Chapter Adviser E-Store Item			Chapter Adviser E-Store Item	$55.00	Quantity	☐

Showing 1 to 1 of 1 entries   Previous 1 Next

Paid Publication

Create Invoice

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.
3. 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 right-hand 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

Refunds

Chapter Items for E-Store

Show 10 entries   Search:

Item	Student	Student ID	Description	Price	Quantity	Select
Chapter Adviser E-Store Item			Chapter Adviser E-Store Item	$55.00	Quantity	☐

Showing 1 to 1 of 1 entries   Previous 1 Next

Paid Publication

Create Invoice

Refund Request

Back

E-Store Refunds

Expand Items	Invoice Number	Select
–	1248	Select All ☐

Item Name	Amount	Member	Select
Test Item	$10.00		☑

Submit Refund Request

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.

Chapters	Requests	State Staff and Permissions	Rates and Settings	Conferences	Accounting	Reports	Quick Links	Notifications	Resources	E-Store	Surveys

Select A Category

Chapter Adviser Surveys

Show [10] entries   Search: [   ]

Survey Name	Name(s)	Status	Conference	Event	Team	View/Continue Survey
Chapter Adviser Test Survey	System Admin	Not Started				👁

Showing 1 to 1 of 1 entries   Previous **1** Next

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:

Select/Deselect All ⟵

☑ Sally Sue (Student)   ☑ Anne White (Student)

Subject:

[Subject]

Message:

Type your message here.

[Send]

Recommendations Tab and Screens

How to Make a Recommendation

The Recommendations option enables you to make a recommendation to National BPA for program change or enhancement for subsequent membership years.

1. Click on the "**Recommendations**" Tab.
   - Any previously submitted recommendations will appear under the "Recommendation History" section of this screen.
2. Click on the "**Add Recommendation**" button.
3. Select the "**Subject**" from the "**Subject**" drop-down field.
4. Type your "**Recommendation**" in the "**Recommendation**" field.
5. Type your "**Rationale**" in the "**Rationale**" field.
6. Continue inputting the required information (all fields highlighted in **RED** are required).
7. Click on the "**Submit**" Button.

Add recommendation   Back

Subject

Select

Recommendation

Type your recommendation here.

Rationale

Type your rationale for the recommendation here.

Does this replace a current policy or procedure? **If this recommendation is adopted, would it require a similar change to other events?** **State**

Don't Know   Select   Select

Email   **Representing**

jsmith@bpa.org   Select

Note: Once reviewed and a determination made by National BPA, you will be notified of the outcome of your recommendation. The determination will also be found on the "Recommendation History" page.

Attachment

Choose Files No file chosen
Max file size 50MB.

Submit

Donation Campaigns and Screens

How to Make a Donation

The Donation Campaigns tab provides you the opportunity to contribute to a fundraising cause that is created by National BPA. Donation Campaigns may include fundraising for student scholarships, National Service Projects, and more.

1. Click on the "**Donation Campaigns**" Tab.
2. Select the "**Present**" icon under the "**Donate**" column for the campaign you'd like to contribute to.

| Students | Chapter Information | Chapter Advisor(s) | Conferences | Invoice History | Quick Links | State Information | Resources | ▾ |

Available Campaigns

Show [10 ▾] entries

Search: [   ]

Name	Description	Start	End	Donate	
Fall Scholarship Fundraising Campaign	Scholarship Fundraising	08/20/2021 05:00 pm	10/31/2021 05:00 pm	🎁	

Showing 1 to 1 of 1 entries

| Previous | **1** | Next |

3. Input your desired "**Donation Amount**" in the "**Donation Amount**" field.
4. Continue inputting the required information, including Credit Card and Billing Information (all fields highlighted in **RED** are required).
5. Click on the "**Submit Donation**" Button.
6. A receipt of your donation will be sent to the email address on file in your Advisor Profile.

Note: All donations to Business Professionals of America are tax-deductible. Contact finance@bpa.org at the end of the calendar year for a letter detailing your financial contributions to BPA.

Graduation and Rollforward Process

How to Graduate Members

At the beginning of each membership year, the Membership system is refreshed and the chapter's membership roster is carried over from the previous year. With every new membership year, some students will renew their membership and others will have to be graduated or removed. The Graduate process is your opportunity to refresh the chapter membership roster for the new membership year.

1. Navigate to register.bpa.org and login using your credentials from the previous membership year.
2. After the initial login, the Chapter Advisor Confirmation screen will appear and you will need to complete all required information before proceeding into the chapter portal.

Chapter advisor, please confirm your chapter information.

Original Chapter ID:

55-0002

Student Password:

••••••••

Please Update Your Principal's Information

Principal's First Name:
Janet

Principal's Last Name:
Dover

Principal's Email:
janet@gmail.com

Select Graduation Preferences

Select The Highest Grade Level For This Chapter:
8

Please Select One Of The Following Options On How To Treat Your Graduating Members:

Eligible for Alumni

Select...
Move Onto Various Chapters
Eligible for Alumni
Move Onto One Chapter

Advisor Partner Emails Opt-in

Advisor Name	Opt into partner emails
Patrick Schultz	Select...
Jonathan Smith	Select...

Confirm   Log Out

BPA Membership Registration System

- "**Student Password**" = set the default password that you will give students for them to access their individual student portals.
- "**Principal's Information**" = verify/change your school principal's

name and email address.

- "**Select Graduation Preferences**" = these fields determine which and how students are graduated from the chapter.
    - "**Select the Highest Grade Level for this Chapter**" = set the highest grade level offered at the school. For example, in a Secondary chapter, if you select "**12**" as the highest grade level, any students who were in 12th grade the previous membership year will be marked for graduation.
    - "**How To Treat Your Graduating Members**" = select the option that makes the most sense for the majority of your graduating members (Note: You will be able to change individual preferences later in the process).

GRADUATING MEMBER OPTIONS	
Eligible for Alumni	Ideal for graduating Post-secondary members, as well as graduating Secondary members not moving on to a Post-secondary chapter. An email will be sent to these members inviting them to join the Alumni Division.
Move onto One Chapter	Ideal for Middle Level members moving onto a single Secondary chapter.
Move onto Various Chapters	Ideal for graduating Secondary members moving on to various Post-secondary chapters.

- "**Advisor Partner Emails Opt-in**" = selecting "**Yes**" will enable you to receive email communications directly from our trusted partners, introducing services and resources to enhance your classroom curriculum.
3. After completing the Chapter Advisor Confirmation screen information, select the "**Confirm**" button.
4. Read the "Graduation" pop-up instructions carefully, and select "**Close**".
5. Select the red "**Graduate**" button on the Action buttons line.
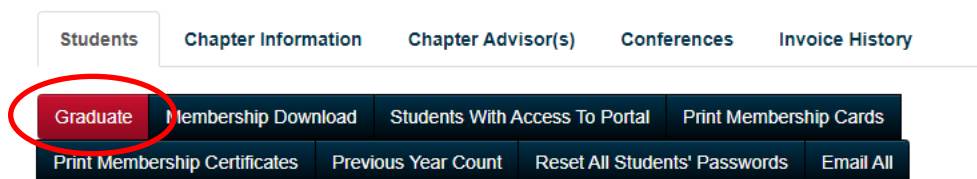
6. Read the instructions on the "**Graduate**" screen and continue the process.
   • Verify student(s) listed are graduating from chapter; select all that will be graduating by selecting the "**Checkbox**" under the "**Graduating**" column, or by selecting the "**Select All**" button.
   • For each student, input the student's email address in the "**Post-Graduation Email**" field. Note: this is especially important if the student destination is marked "**Eligible for Alumni**". They will be emailed an invitation to join the National BPA Alumni Division.
   • Verify the "**Graduating School**" destination for each student. If it needs to be changed, select the "**Select**" button under the "**Change Destination**" column.
   • Once all information is verified, select the "**Graduation Completed**" button.

Back

Please read the following information before completing the graduation process.

The purpose of the graduation process is to maintain the student's history throughout their academic career. This process will allow you to move a student's record on to the corresponding chapter for their continued education or makes them eligible for Alumni membership.

To complete this process, confirm the Graduating School of the students to the best of your ability. To modify a Graduating School, click on the **Select** button. Here you can select the city and chapter of which the student will be attending. If the student is graduating the 12th grade and is not continuing to a post-secondary institution affiliated with BPA, please select the **Move to Alumni** option and enter the student's post-graduation email. Then select **Confirm** to save changes.

Select all students who are graduating under the Graduating column. If a student is not advancing grades, do not select the student to graduate from the chapter. The unselected student will be retained on the chapter member roster.

Select the **Graduation Completed** button to save changes. If you have not completed the graduation process, please select **No** in the subsequent pop-up to complete the graduation process at a later time. If the graduation process is complete, select **Yes** to move on to the bulk editing process.

YOU WILL NOT BE ABLE TO BULK EDIT OR SUBMIT MEMBERSHIP UNTIL THE GRADUATION PROCESS IS COMPLETE.

Select All

Search: [   ]

Graduating	Membership ID	Last Name	First Name	Email Address	Post-Graduation Email	Advancing Grade	Graduating School	Change Destination
☐	00039790				Post-Graduation Email		National Virtual Chapter - Secondary - 55-0001	Select

Showing 1 to 1 of 1 entries

Graduation Completed   Drop Selected

7. Review the "**Graduation Complete**" pop-up and select "**Yes**".
8. Select the red "**Edit Students**" button on the Action buttons line to continue onto the Rollforward and Bulk Editing process.

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History

Edit Students	Membership Download	Students With Access To Portal	Print Membership Cards
Reset All Students' Passwords	Email All		
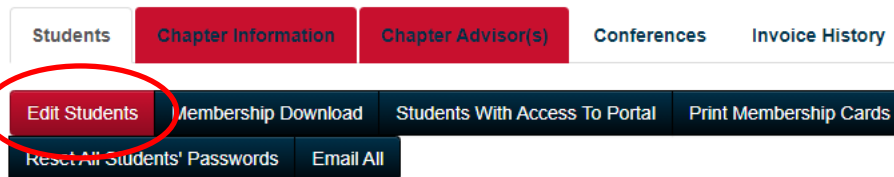
9. Read the instructions on the "**Bulk Edit**" screen and continue the process.
   - Review the student members listed on the roster and select the "**Bulk Grade Rollforward**" button. This will move all students up by one grade level.
   - Verify all student information, including "**Member Title**", "**Cell Phone**", and "**Email**".
   - If there is a student on the roster that will not be renewing their membership, select the "**Drop**" button to remove them from the chapter.
   - Once all information is verified, select the "**Bulk Edit Complete**" button.

Please read the following information before completing the BULK EDIT process.

The bulk edit process is a one-time edit to allow you to update your previously registered students.

Please review and update the following information:

- Grade Level
- Member Title
- Email Address
- Cell Phone Number

To advance the grade of all students, please use the **Bulk Grade Rollforward** button to automatically transition students to the next grade.

You may also drop any students from the roster who will not be participating in the current year. Select the students you would like to drop by placing a checkmark next to the student's name. Then select the red **Drop Selected Students** button at the bottom of the page. Select **Confirm** in the pop-up message that appears if you'd like to drop the students.

Select the **Bulk Edit Complete** button to save changes to student information. If you did not fully complete the bulk edit process, select No on the subsequent pop-up to allow you to return to the bulk editing screen at a later time. If you have completed this process, select Yes to move on to submit membership.

YOU CANNOT SUBMIT MEMBERSHIP UNTIL YOU HAVE COMPLETED BULK EDITING.

To edit individual records after the bulk editing process has been completed, select the Edit pencil icon next to the student's record.

[Bulk Grade Rollforward]

Search: [_____]

Membership ID	Name	Grade	Member Title	Cell Phone	Email	Drop
00008608	▇	7	Chapter Member	Cell Phone	Email	Drop
00039701	▇	7	Chapter Member	Cell Phone	Email	Drop
00039790	▇	6	Chapter Member	Cell Phone	Email	Drop
00040685	▇	6	Chapter Member	Cell Phone	Email	Drop

Showing 1 to 4 of 4 entries

[Bulk Edit Complete]

10. Review the "**Bulk Edit Complete**" pop-up and select "**Yes**".
11. Select the "**Chapter Information**" tab to verify and update chapter information including the "**School Address**", "**Billing Address**", phone numbers, websites, default "**Student Password**", and more (refer to **Page 16**).
12. Select the "**Chapter Advisor(s)**" tab to add/remove chapter advisors, and update the information for each chapter advisor assigned to the chapter (refer to **Page 16**).

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	State Information

Resources

Membership Download	Students With Access To Portal	Print Membership Cards	Print Membership Certificates	Previous Year Count

Reset All Students' Passwords	Email All
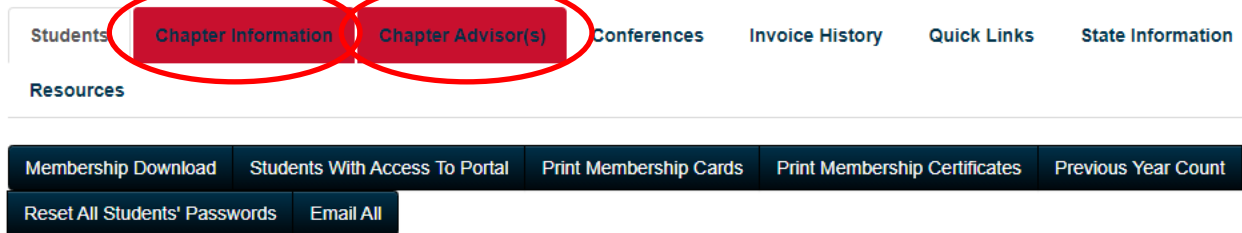
Congratulations! You have completed the "**Graduation and Rollforward Process**" and are now ready to begin adding chapter membership (refer to **Page 6**).