

# Adding New Members: 4 Ways

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Created by

Katera Poma

Creation Date

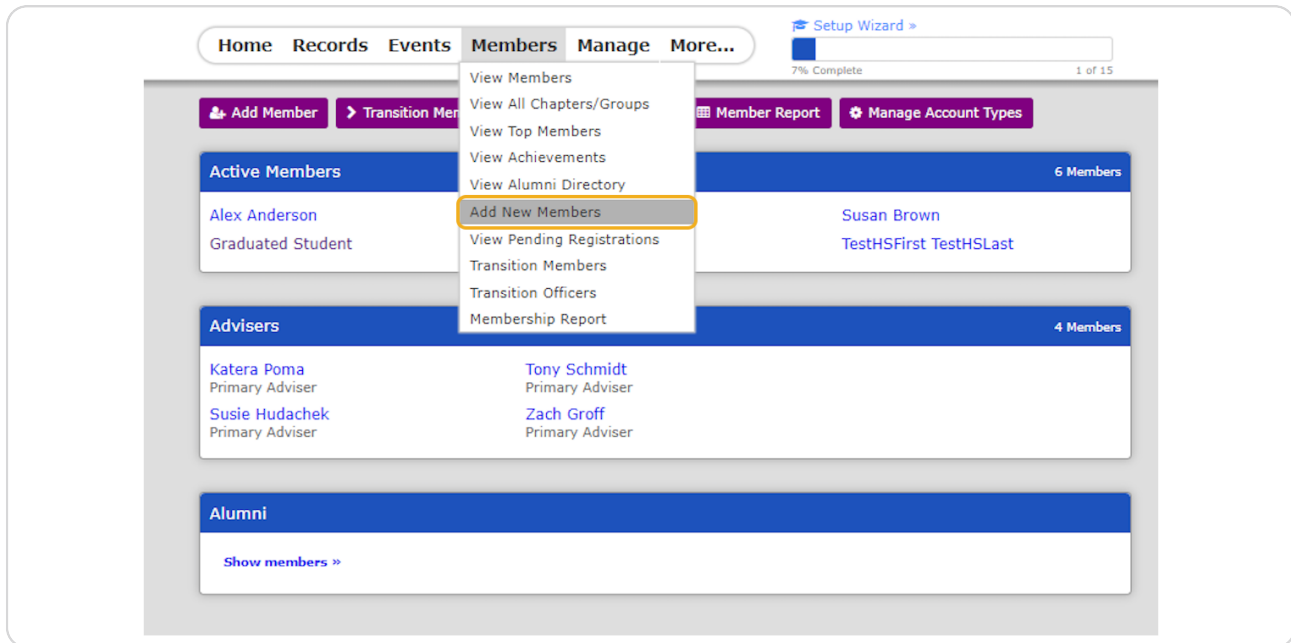
August 2, 2023

Last Updated

August 9, 2023

## STEP 1

### MembClick on Add New Members



## STEP 2

### 4 Ways to Add New Members

Add Existing Members, Manual Entry, Upload or Sending Registration Link

The screenshot shows the 'Add Unpaid Student' form in the FBLA MembClick application. The form is titled 'Add Unpaid Student' and includes the instruction: 'Choose one of the four options available to add contacts to your chapter.' There are four options for adding new members:

- Option 1: Add Existing Member**: This option allows users to search for existing members. It includes a 'Search Member Database' input field with a search icon, a 'View Profile' link, and an 'Add Existing Member' button.
- Option 2: Manual Entry**: This option allows users to manually enter contact information. It includes fields for 'Full Name' (First Name, Middle Name, Last Name, Suffix), 'Preferred First Name', and 'Personal E-mail', along with an 'Add Contact' button.
- Option 3: File Upload**: This option allows users to import contacts from a CSV file. It includes an 'Import Contact Data (.csv)' button.
- Option 4: Registration Link**: This option allows users to send a registration link to their high school chapter's public registration page. It includes a text box with the URL: `https://connect.fbla.org/testhighschool/register.php`.

# # 1 – ADD EXISTING MEMBER (TRANSFER STUDENT)

1 Step

## STEP 3

Search by students name or email address. Select student and click "Add Existing Member" button.

**Option 1: Add Existing Member**  
Transfer students, or students graduating from another school to yours, may already be in the system.

**Option 2: Manual Entry**  
Individually enter each person's contact information to add them to your roster.

Search Member Database

- Diana Chavez  
Colusa High School
- Diana Chavez  
Colusa High School
- Diana Chavez Vazquez  
Bassett High School
- Diana Chavez-Hernandez  
James B. Hunt High School

# # 2 – MANUAL ENTRY

1 Step

## STEP 4

Add students information and click "Add Contact" button.

**Option 2: Manual Entry**  
Individually enter each person's contact information to add them to your roster.

Full Name

Personal E-mail

# # 3 – UPLOAD

4 Steps


## STEP 5

### Click on Import Contact Data (.csv)

#### Option 3: File Upload

Use a CSV file to import a list of contacts onto your roster.

Import contacts from a CSV file

 **Import Contact Data (.csv)**

## STEP 6

**Download the provided template and enter your members information. Name, email (personal email is preferred), grade and gender are required. Save template on your computer as .CSV**

Gender:


Female, Male, Non-Binary

Grade: 5, 6, 7, 8, 9, 10, 11, 12, Collegiate Freshman, Collegiate Sophomore, Collegiate Junior, Collegiate Senior, Graduate, Alumni, N/A

#### Upload Import File

The data file must include column headers in the first row and must be in the .csv (comma-separated values) file format. [How to save an Excel file as CSV](#)

- 1** Download CSV Template  

 **Download Template**
- 2** Enter Contact Information  

Example CSV File

First Name	Last Name	Email	Grade	Gender
Alexander	Anderson	alex@example.com	6	Female
Aiden	Peterson	aiden@example.com	11	Male
Cady	Clarks	cady@example.com	Collegiate Freshman	Non-Binary
Ash	Powers	ash@example.com	Collegiate Graduate	Male
Abby	Marks	abby@example.com	Alumni	Female
- 3** Upload CSV File  

Select CSV file for import:

No file chosen

**Import Unpaid Students**

## STEP 7

### Upload your .CSV template and click "Import Unpaid Students"

**3** Upload CSV File

Select CSV file for import:

Katera CA1 - HS - Tier 3.csv

## STEP 8

### Upload you .CSV template again to reverify your information. and click on "Import Unpaid Student and Send Invitation Emails"

Please do not re-map any of the other information on this page

Map Columns

Import File Column	Database Column
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last Name"/>
Email	<input type="text" value="Email"/>
Gender	<input type="text" value="Gender"/>
Grade	<input type="text" value="Grade"/>

**Account Type:** Unpaid Student

**If a member already exists?**  Don't overwrite existing data, but fill in blank fields with imported data  
 Overwrite existing member information with imported data  
Matching on National ID or Email Address.

**Select .CSV data file:** Select the same file as in Step 1 to match the file headers:  
 Katera CA1 - HS - Tier 3.csv

**Values to Ignore:**  Separate multiple values to ignore with commas.

## # 4 – REGISTRATION LINK

4 Steps

## STEP 9

**Copy link: <https://connect.fbla.org/testhighschool/register.php> and send to prospective members**

Link can be used to register advisers and alumni as well

### Option 4: Registration Link

Share a link to anyone who you would like to register to be added to your roster.

Send this link to your high school chapter's public registration page. You will need to approve each account before they can log in:

<https://connect.fbla.org/testhighschool/register.php>

## STEP 10

**Click on I am a student**

### Create a new FBLA Connect account

#### Select your status

I am a student

I am an advisor

I am an alum

#### Soon you'll be able to...

- Register for events and meetings.
- Pay membership dues and other fees.
- View roster and message other members.
- Help officers manage their roster.
- Review transactions during an audit.
- Ensure smooth officer transitions.
- Browse alum directory by industry/location.
- Browse or post jobs on the Job Board.
- Keep in touch through email subscriptions.

## STEP 11

### Student will fill out form and Submit

**Create a new FBLA Connect account**

E-mail:

Password:

Password (again):

Name:   Suffix

Maiden Name:

Gender:  Female  Male  Not Selected Test High School Officers Only

About yourself (optional)

Preferred First Name:  Replaces your first name throughout the system. Test High School Officers Only

Phone Number:  Test High School Officers Only

Campus Address:  Test High School Officers Only  
  
City  State  Zip Code

Home Address:  Test High School Officers Only  
  
City  State  Zip Code


Graduation Class:  Test High School Officers Only

T-Shirt Size:  Test High School Officers Only

## STEP 12

The adviser will receive an email informing them that they need to approve a new account request. You can click on the blue "View pending accounts" link

A new account is pending your approval on FBLA Connect

 FBLA Connect <mail@fbla.org>  
To: Katera Poma Wed 8/2/2023 9:58 AM

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

Future Business Leaders of America FBLA Connect

A new registration needs your approval  
A new account has been created by **Gwen Dodds** requesting approval to join **National Center's** FBLA Connect site.  
[View pending accounts](#)

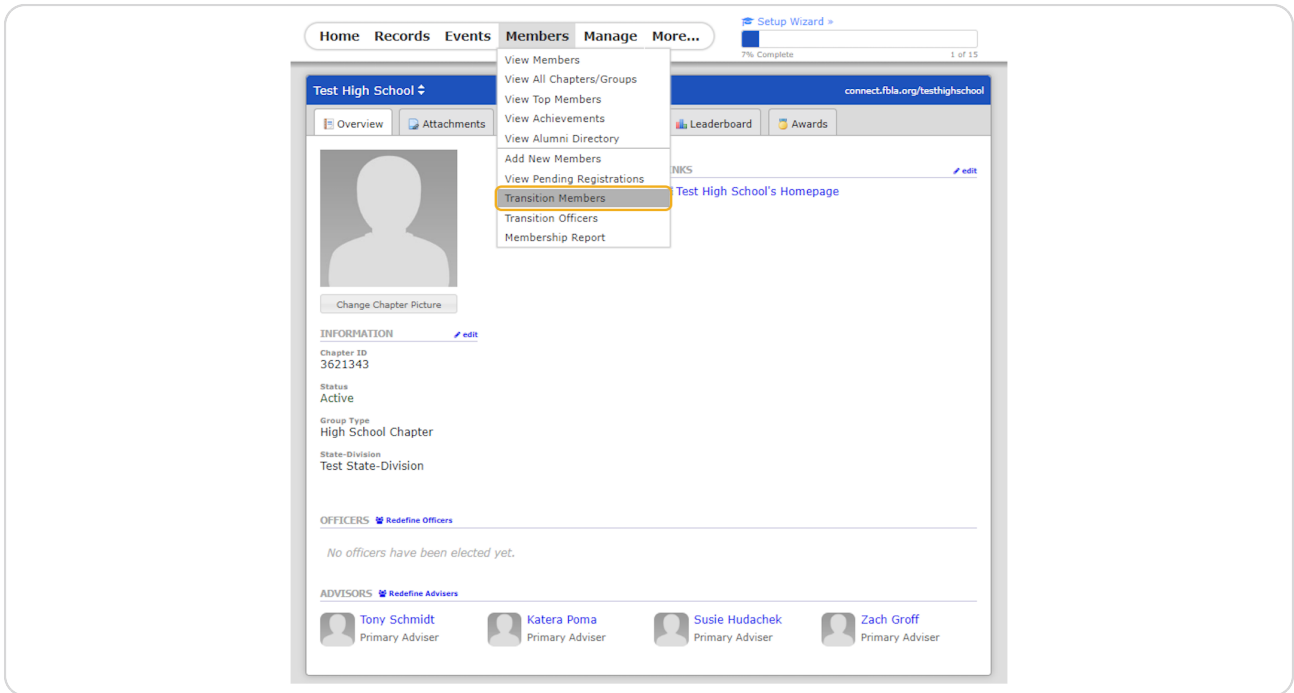
[Login at connect.fbla.org](http://login.at.connect.fbla.org) | [Update Contact Preferences](#)

# # TRANSITION MEMBERS // CREATE INVOICE OR...

4 Steps

# STEP 13

## Members: Transition Members





## STEP 14

**Select unpaid students you want on your invoice from unpaid student list and then click "Transition to Member" button. Anyone with a Green \$ with an arrow is already on an unpaid invoice.**

Transitioning Members = creating an invoice/quote

### Transition Members

Below you will see all of your member's official Future Business Leaders of America membership statuses. Use the tools below to report to the national Future Business Leaders of America office of any membership status changes. An invoice will be generated for your high school chapter if a payment is required to make this transition.

Unpaid Student Member Alumni

Includes the *Unpaid Student* account type. Includes the *Active Member, Officer* account types. Includes the *Alum, Adviser* account types.

+ Add Unpaid Students Graduate Members >> Alex Anderson

With selected unpaid students...

Transition to Member >> Select All Select All

- Alex Anderson \$→
- Alice Pulugurtha
- Alison Vist
- Anika Ryszkowski
- Devdutta Wise
- Fake Student
- Graduated Student \$→
- Jahnvi Sharma
- Karl Mikes \$→
- Madison Shen
- Maurya Ravichandran
- Nadia Pinni
- Sonia Talloo
- TestHSFirst TestHSLast \$→
- Yumna Omran

## STEP 15

### Choose quote or invoice.

The screenshot shows the 'Transition Members' interface. At the top, there are three tabs: 'Unpaid Student', 'Member', and 'Alumni'. Below the tabs, there are instructions and a list of members. A modal dialog titled 'Quote or Invoice?' is open, asking 'Do you need a quote or generate the invoice instead?'. The dialog has two radio button options: 'View the quote, convert to an invoice later.' and 'Generate the invoice, skip the quote step.' The 'Generate the invoice' option is selected. There are 'Submit' and 'Cancel' buttons at the bottom of the dialog.

## STEP 16

### Click on Quote for Purchase Orders or go straight to Invoice.

The screenshot shows an FBLA invoice for '2023 High School National Fees'. The invoice is titled 'INVOICE' and includes the FBLA logo. It lists the 'Sent By' information (Future Business Leaders of America, Inc.) and the 'Bill To' information (Test High School). A 'NOT PAID' status is displayed. The invoice details include a table of fees:

Membership Status	Price	Quantity	Amount
Members transitioning from Unpaid Student to Active Member	\$10.00	1	\$10.00
Fake Student			
Test State Fee	\$4.00	1	\$4.00
Subtotal			\$14.00
Total			\$14.00
Paid			\$0.00
Due			\$14.00

Below the table, there is a 'Payment via Purchase Order' section with a 'Choose File' button and a 'Pay Now' button. The total amount due is \$14.00. A red box highlights the 'Remittance address' and the 'Payment via Purchase Order' section.

