Adding New Members: 4 Ways

16 Steps   [View most recent version ↗](#)

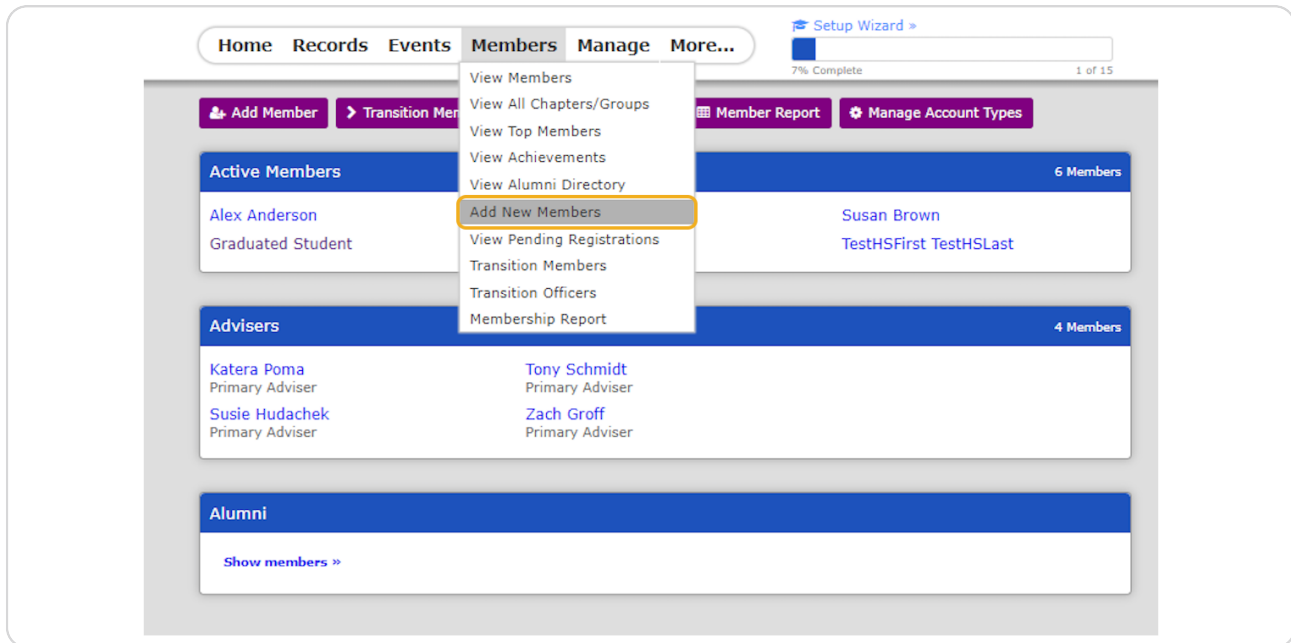| Created by	Creation Date	Last Updated
Katera Poma	August 2, 2023	August 9, 2023

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

1 – ADD EXISTING MEMBER (TRANSFER STUDENT)

STEP 3

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

2 – MANUAL ENTRY   1 Step

STEP 4

Add students information and click "Add Contact" button.

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:

Choose File   No file chosen

Import Unpaid Students

STEP 7

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

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

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

STEP 10

Click on I am a student

STEP 11

Student will fill out form and Submit

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

⊞ TRANSITION MEMBERS // CREATE INVOICE OR... 4 Steps

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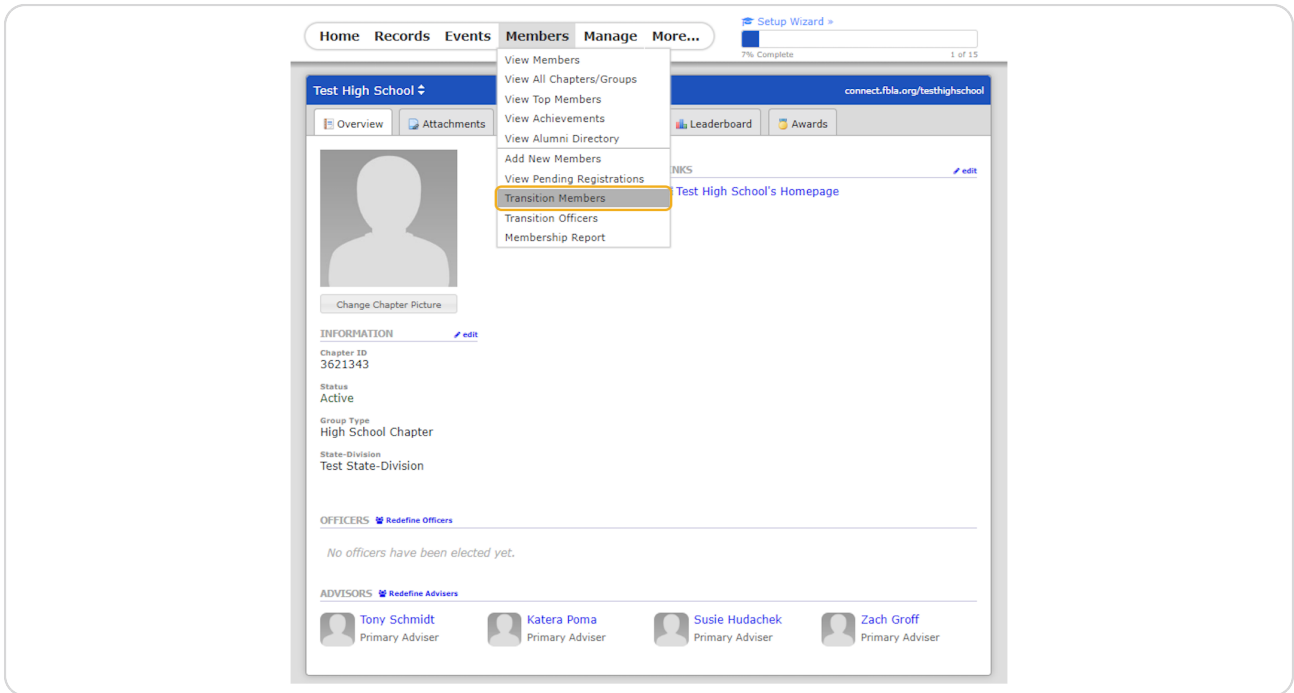
Select unpaid students you want on your invoice from unpaid student list and then click "Transition to Member" button. Anyone with a Green $ with an arrow is already on an unpaid invoice.

Transitioning Members = creating an invoice/quote

STEP 15

Choose quote or invoice.

STEP 16

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