

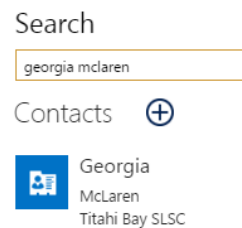
SLSNZ Portal – The Member Lounge

Members can be set up to log into the Member Portal.

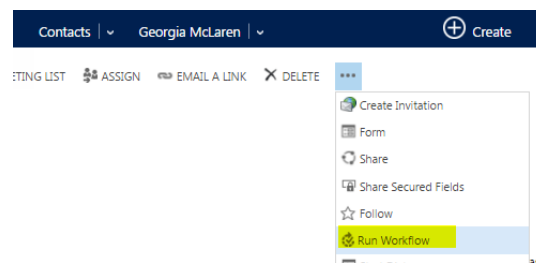
The database administrator can set them up and email them a link to the Portal plus a username and a password. Alternatively, an automated invitation can be sent to the member or the club administrator can set them up manually in the CRM.

Auto Email to an Individual Member:

1. Search for their contact record and open it.



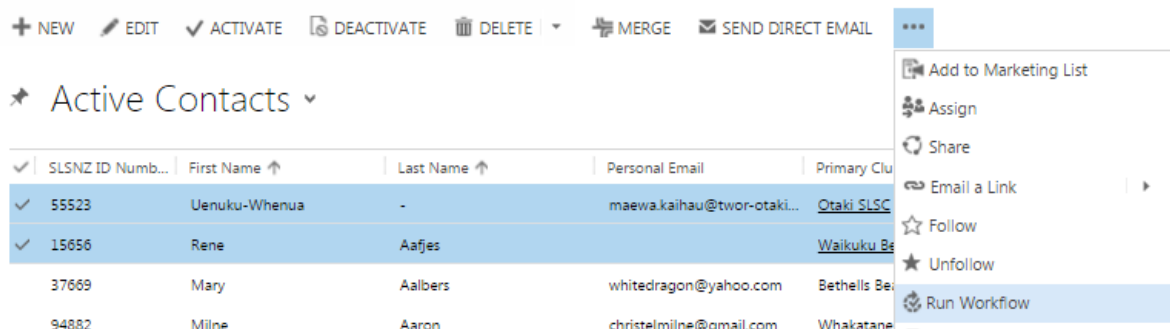
2. Look to your command section and click the three dots. Select 'Run Workflow'.



3. A list of workflows will appear. Tick 'Contact: Bulk Send Portal Invitation' and click Add.
4. An email address for the contact is identified and the portal invitation is sent to the contact.

Auto Email to Multiple Members:

1. Go to Active Contacts
2. Tick the contacts you wish to send the invitation to and click 'Run Workflow'.

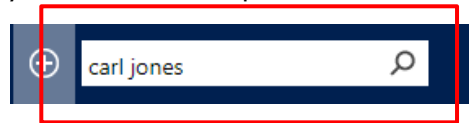


3. Ensure that 'bulk send portal invitation' is ticked and click Add.

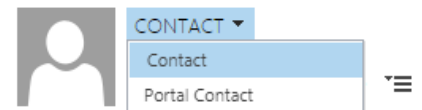
Manual Set Up in the CRM:

CRM administrators have the ability to set up their members to log in the web portal.

1. Search for the contact you want to set up.



2. Once the contact record is open, change the type of record from **contact** to **portal contact**.



3. Scroll down to the Web Authentication section.

Web Authentication

Account Control	
Username	79766
Identity Provider	--
Reset Password	--
Logon Enabled	<input checked="" type="checkbox"/>
Locked Out	<input type="checkbox"/>
System User	Titahi Bay SLSC

Enter the details about their log in:

- Username = SLSNZ ID number
- Reset Password = choose and reset passwords here
- Logon Enabled = tick

4. Scroll down to Web Role Information section and click the + icon on the right. Select the following web roles from the menu of options.

- Member
- Member – Change Address

Click the floppy disc icon in the bottom right hand corner to save your changes.



To set up a member in your club as a club administrator, a patrol manager or an EnterNOW administrator, follow the instructions above but add the following web roles:

Club Administrator

- Is Club Admin = change to Yes
- Club Admin Level = change to Update
- Award Approval Level = Club

Add the following web roles by clicking the plus sign icon on the right hand side of the page.



- Club Admin Base Role
- Awards View and Awards Update
- Patrol View and Patrol Edit
- Membership View and Membership Edit
- Member and Member – Change Address
- Family View and Family Edit
- Incident View and Incident Edit
- Club Course Instances: View (**for bookings admin only**)
- EnterNOW Administrator (**for competition/entries admins only**)

Sports Administrator

- Member and Member – Change Address
- EnterNOW Administrator

For the direct link to work, the contact's primary membership must be **primary** and **active**.

Patrol Manager/Patrol Captain

- Is Patrol Manager = change to Yes

Add the following web roles by clicking the plus sign icon on the right hand side of the page.

- Member and Member – Change Address
- Patrol View and Patrol Edit
- Incident View and Incident Edit