

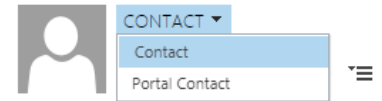
Managing Member Portal Logins

CRM administrators can set up/change their member's log-ins to the Member 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 **Web Authentication**:

Web Authentication

Account Control

Username	SLS_12345	Logon Enabled	<input checked="" type="checkbox"/>
Identity Provider	--	Locked Out	<input type="checkbox"/>
Reset Password	password0	System User	Titahi Bay SLSC

Field	Fill With
Username	The format needs to be SLS_ then their membership number (i.e. SLS_12345)
Reset Password	Manually enter the new password and advise the member
Logon Enabled	Tick this box
Locked Out	Ensure this is unticked
System User	Select their primary club (note this is only for members who need to be set up as Club Administrators)

4. Scroll down to **Web Roles**. Use the + sign to add the roles required for the access below:

Level of Access	Name of Roles Required	Total Number of Roles
Member Access Only	<i>Member & Member – Change Address</i>	2
Patrol Captain Access	<i>Incident View, Incident Edit, Patrol View, Patrol Edit, Member & Member – Change Address</i>	6
Club Administrator Access	<i>Club Admin Base Role, Awards View, Awards Update, Patrol View, Patrol Edit, Membership View, Membership Edit, Member, Member – Change Address, Family View, Family Edit, Incident View, Incident Edit, Club Course Instances: View</i>	14

To set up a Club Administrator you must also ensure that:

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

To set up a Patrol Manager/Patrol Captain you must also ensure that:

- Is Patrol Manager - change to Yes