

Quickstart guide for Portalbuzz users

Welcome to Portalbuzz!

As a member of your club, you now have access to functions that make it easy for you to keep up on all the important happenings of your club - all in one place.

Portalbuzz is a club management system that provides your organization with easy to use online tools as well as a public website. You can sign up for meetings and events, sign up to volunteer, email club members, view calendars, download documents like agendas and minutes and much more!

This guide will show you how to perform all the basic member functions in the application. The best way to learn is to explore; use this guide to learn the basics and then click around to see for yourself!

Table of Contents

Getting started: login and set password	2
What can you do using Portalbuzz?	3
Your starting place	4
Getting around: navigation menu buttons	5
Members	5
Calendar	5
Meetings & Events	6
Committees	7
Email	7
Documents	8
Newsletters	8
Help	8

Getting started: login and set your password

To get started using Portalbuzz, you must first log in and set your password. The site is password protected so only members of your club will have access to information.

- Go to members.portalbuzz.com, the main login page of the Portalbuzz site.
- Under the Login button at the bottom, click the link to create a password.
- Enter your email address in the Email textbox, then click the Submit button.
- You will be instructed to check your email inbox. The email will provide information to set your password. Make sure to check your spam folder if you don't see the email in your inbox.
- Once you create a password, you can log in to Portalbuzz.com and start exploring all the features available.
- If you encounter any issues during registration or need any assistance, check with your club site administrator or send an email to support@portalbuzz.com.

Portalbuzz

Portalbuzz Login

support@portalbuzz.com

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Remember me [Forgot Password?](#)

LOGIN

First time logging in?
[Create a password.](#)

Login not working?
[Reset password.](#)

Still need help with logging in?
[Get help.](#)

What can you do using Portalbuzz?

Portalbuzz functions as the communication hub of your club. Whether you are a member or run the club, Portalbuzz provides online tools that help you communicate and stay up to date on all the things that are important to your club.

While you may not use all the features of the system, it is helpful to understand the functions available and how other members may be using the system. As a member, you have all the tools you need right at your fingertips!

As a member, you can:

- Manage your own member profile
- Manage email preferences
- View club member directory and member information
- View club happenings on a start page customized to your preferences
- See personalized notifications
- Sign up to volunteer
- View gaps in volunteer coverage and club needs
- View committee information and tasks
- View your organization's calendar including times and locations of events
- View and send messages to other members and non-members
- View meeting and event information including speakers
- View speaker vacancies
- Stay informed (especially about missed meetings)
- View newsletters
- Download relevant documents

Secretary

- Maintain records
- Maintain member directory
- Print customized directory
- Send email announcements
- Integrate district reports (if applicable)
- Assign member roles

Meetings and Events Administrator

- Communicate and display event needs
- Manage event tasks
- Publish a calendar of events
- Print volunteer signup sheets
- Send email reminders to volunteers and non-volunteers
- Centrally store all event information for current and future reference

Committee Administrators

- Easily communicate with committee members
- Post and archive meetings minutes and other important documents
- Schedule meetings
- File reports electronically
- Manage meeting speaker and programs
- Assign and manage tasks

Event Participants

- Sign up for events
- Change your volunteer commitment
- View gaps in event coverage
- See who is volunteering
- Access relevant event information

Public Website Administrator

- Manage content in the private and public websites with easy to use controls
- Choose from 7 template designs
- Promote sponsorships with small banner ad space (if desired)
- Create a professional public website

Newsletter Editor

- Create and publish newsletters online (email and web)
- Post newsletters in MS Word or PDF format for members to download
- Store newsletter on website for easy retrieval

Your starting place

Once you have logged, the Start page is the main page of the portal. This page provides you with a snapshot of what is going on with your club. There are three main parts on the Start page:

1. **Navigation menu** - You'll use the navigation menu on the left to access all the functions of the website. Whenever you need to return to the Start page, simply click the Me button at the top of the navigation menu.
2. **Meetings and events** - The Meetings and events section at the top of the page provides you with a snapshot of the upcoming meetings and events.
3. **Message hub** - Better than email, the Message hub keeps all the communication within the website for easy retrieval, filtering and communication with other members. New messages show up on your Start page, so you'll always be up to date with the latest announcements.

The screenshot displays the Portalbuzz website interface. On the left is a dark blue navigation menu for user Scott Smith, with the 'HOME' option highlighted and marked with a red circle '1'. The main content area features a header with 'Portalbuzz' and 'PORTALBUZZ DEMO', and a 'Meetings and Events' section marked with a red circle '2'. This section contains a table of upcoming events:

Date	Type	Title	Volunteers needed
Feb 2	m	Regular Meeting Augusta National GC - 9:00 AM	--
Feb 9	m	Regular Meeting Augusta National GC - 9:00 AM	--
Feb 11	c	Car Show Committee Meeting Augusta National GC - 9:00 AM	--
Feb 16	m	Regular Meeting Augusta National GC - 9:00 AM	--
Mar 4	e	Annual Trivia Night Jack's Restaurant & Lounge - 8:00 PM	6

Below the events is a 'Message Hub' section marked with a red circle '3', showing a message from Scott Smith dated 1/24/2017. The interface includes various filters and navigation options like '+Message', 'Search', 'Email notifications', and 'Privacy'.

Getting around: navigation menu buttons

Members

This section allows you to quickly find member information such as email telephone numbers as well as more detailed information like address, birthday and more.

- Click the Members icon from the navigation menu to the left.
- Click the magnifying glass to show more detailed information about a member.
- Click the Back button to return to the Members page.
- Click the Show Former & Pending Members link at the bottom of the page to view previous members. Click the Hide Former & Pending Members link to return to current grid.

Note: You can update your own member information by clicking the Edit profile link in the upper right of the Start page.

Calendar

The Calendar keeps you updated on latest and upcoming meetings, events, user entries and birthdays. This is also where you can create or add new activities to display on the calendar.

- Click the Calendar icon from the navigation menu.
- View desired information by marking the checkboxes under the Type heading.
- To insert a manual calendar entry that is not added in the Meetings and Events section, double click on the date where you would like to insert an entry. The Add User Entry form will show. Insert relevant information, then click the Save button. The new event will show on all club member calendars.
- Navigate the Calendar by clicking the left and right arrow buttons at the upper left of the calendar grid.
- The Today button will return you to the current month and show today's date highlighted.

Meetings & Events

On this page you can view meeting and event information, view meetings and events for which you are signed up, and view additional information for specific meetings and events. Information displayed for meetings and events varies slightly.

- Click the Meetings and Events icon from the navigation menu.
- A meeting shows with an “m” and an event shows with a “e” under the Type heading.

If you'd like to:	Then do this:
View meeting or event details	<ul style="list-style-type: none">• Click the View link in the grid to view details of the meeting or event.
View a map of the location of a meeting or event	<ul style="list-style-type: none">• Click the meeting or event to highlight it. The information will show at the top of the page.• Click the Map icon to view a map showing the location of the meeting.
Sign up for a meeting or event responsibility	<ul style="list-style-type: none">• Click the Signup icon in the same row as the meeting or event.• On the Meeting or Event detail page, locate the volunteer position and click either the Signup icon or the Invite a Friend icon to assign responsibility to a non-member.
View meeting assignments for a meeting	<ul style="list-style-type: none">• Click the View link.• Click the Meeting assignment tab. The roles and assignments will be listed.
View meeting attendees	<ul style="list-style-type: none">• Click the View link.• Click the Attendees tab.
View agenda, minutes or other relevant information	<ul style="list-style-type: none">• If uploaded, you can access, view and download documents by clicking the Agenda & minutes tab.
Invite a friend to a meeting or event	<ul style="list-style-type: none">• Click the View link.• Click the Invite a friend tab.• Complete the textboxes, add a document if desired and then click the Send email button.

Committees

This section allows you to view committee information. You can email committee members, view upcoming and past meetings and also view a list of all the club committees.

- Click the Committee icon from the navigation menu.
- To send email to committee members, click the Email Members button.
- Click the Print Page button to print contents of the Committees page. Highlight a specific committee name in order for the detailed information of that committee to show at the top of the page.
- Click the View link in the grid to view committee details.
- Click the Members icon to view the committee members.
- Click the All Committees link to view all committees, including inactive committees.

Email

The email function allows members to send emails to other members and various member lists. The system also allows emails to be sent to non-members.

- Click the Email icon from the navigation menu.
- To view Messages, click the Inbox button, the Drafts button for saved messages or the Sent button for sent messages.
- To view contents of a message, click the Subject link.
- Click the Compose button to create and send an email.
 - Enter recipients by starting to type a member name, committee name, distribution list name, or all members. Choose from the options in the autocomplete textbox.
 - Add a subject, optional attachment, and the message.
 - Click the Send button.

Documents

This is where you can find, view and download saved club files (images, Word, Powerpoint, PDF, etc). You must have additional administrative access in order to upload files to the Document area.

- Click the Documents icon from the navigation menu.
- Select the folder/file you want to view or download.
- Right click to see available options for the file.
- Click the View link to display the content of the file.
- Select Download to save a copy of the file.
- Choose Show URL for the link to be displayed on the screen.
- In the upper right, click the Search bar to search for a file.

Newsletters

Current and previous newsletters are stored in the Newsletter section, allowing for easy retrieval by members.

- Click the Newsletters icon from the navigation menu.
- Select the year from the drop-down list.
- View Newsletters by clicking the Display icon.

Help

If you still need help or more information, click the help button at the top right of the Start page (question mark with circle). There are currently over 175 articles available on a wide range of topics related to the features of the Portalbuzz website.

