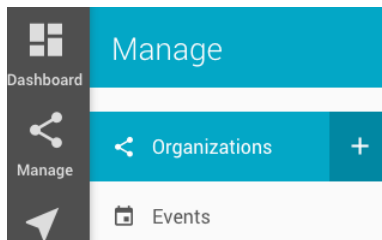


BlazerLink: How to manage your Organization

You can edit an existing organization to make any changes to information about the organization like meeting time, contact information, and more!

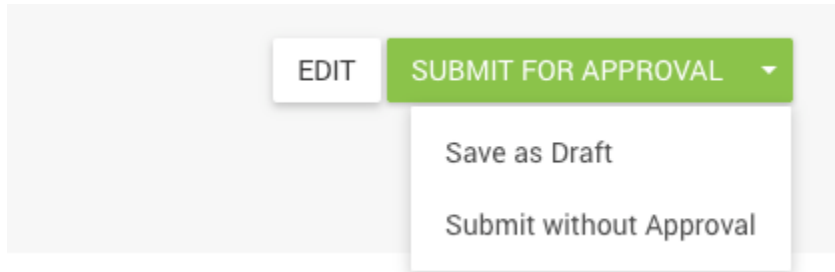
1. Hover over Manage in the left menu, then click Organizations to bring up the organizations list.



2. From the organizations listing page, click the three stacked dots on the right, then select edit.

Meeting Location	Members	
Central Forest	18	⋮
Alumni Office		Edit
The Basement		Roster
First Tuesdays		Documents
Computer Lab #3		Analytics
		View on Portal
		Delete

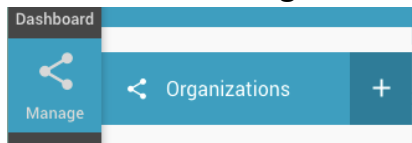
3. From here, you will see the Organization Registration form for the organization that was selected. This is where you can make any edits needed.
4. Once you have completed your edits, click the green "Preview" tab in the upper right hand corner. From here, you will be able to see your updated form. If you notice something needs to be changed you can select the "Edit" tab in the upper right hand corner. If no other edits are needed, you can select one of these options: Submit for Approval or Save as Draft.



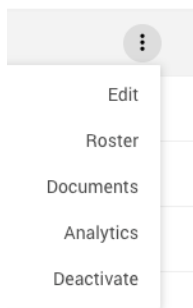
You are able to manage and edit members statuses within an organization to ensure you are able to keep your organization up to date and organized.

Updating Member Roles

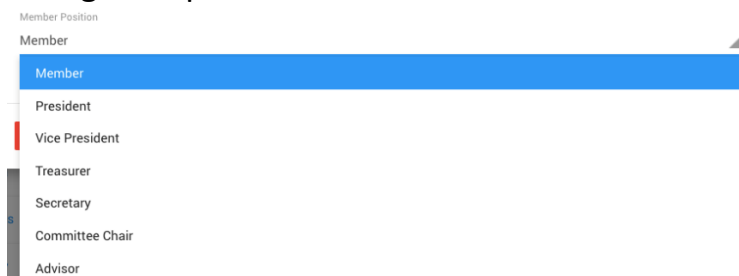
1. Hover over Manage in the left menu, then click Organizations.



2. From the organizations listing page, click the three stacked dots next to the organization you are wanting to update, then select "roster".

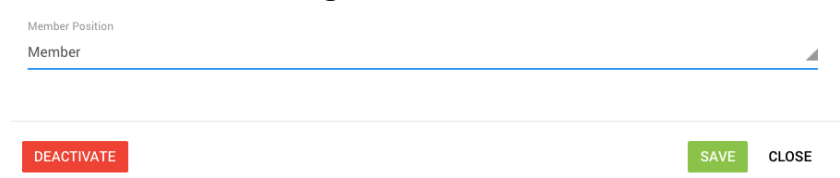


3. Click on the Pencil Icon toward the right of a member's name.
4. An "Edit Member" box will appear, click on the drop down menu to change or update a member's role.



Deactivating a Member

1. Hover over Manage in the left menu, then click Organizations to bring up the organizations list.
2. From the organizations listing page, click the three stacked dots on the right, then select **“Roster”**.
3. You can also select an organization and click the **“Roster”** tab.
4. Click on the Pencil Icon toward the right of a member’s name.
5. An **“Edit Member”** box will appear. Click on the red **“Deactivate”** box to remove a member from the organization.



Adding Students to an Organization

You can add members to an organization to help keep track of your members, officers, and advisors!

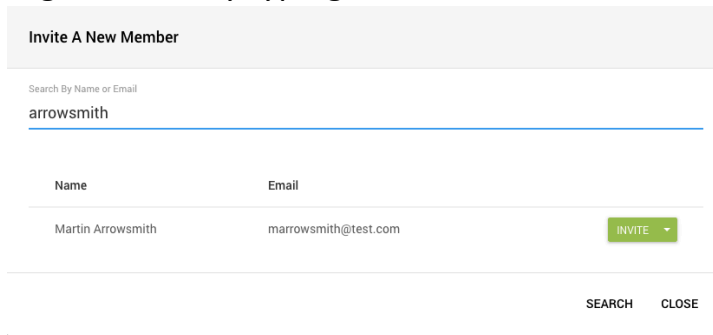
1. Hover over Manage in the left menu, then click Organizations to bring up the organizations list.
2. From the organization’s listing page, click the three stacked dots to the right of the organization you want to add members to, then select **“Roster”**.

Meeting Location	Members	
Central Forest	18	⋮
Alumni Office		Edit
The Basement		Roster
First Tuesdays		Documents
Computer Lab #3		Analytics
		View on Portal
		Delete

3. From here you can invite a single member by clicking the white plus button in the top right of the screen.

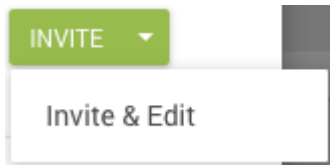


4. In the pop-up box, search for an individual you would like to add to the organization by typing their name or email address and clicking **“Search”**.



Name	Email
Martin Arrowsmith	marrowsmith@test.com

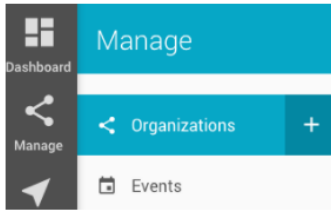
5. From here, click **“Invite”** or the arrow next to it if you’d like to **“Invite & Edit”** and add them as an advisor or officer.



6. Once you click invite, a membership request email will be sent to the individual!

Importing Membership Rosters

1. Hover over Manage in the left menu, then click Organizations to bring up the organizations list.



2. From the Organization's listing page, click the three stacked dots to the right of the organization you want to add members to, then select **"Roster"**.
3. From here you can import a membership roster by scrolling to the attendees box at the bottom of the page, and selecting the down arrow next to **"Invite Members"**. From here select **"Import Members"**.



4. To successfully import members, you will need to upload a .csv file from your computer with the following information. Make sure everything is spelled exactly as you see it here in order for it to work!
 - a. Position (Member, President, Vice President, Treasurer, Secretary, or Committee Chair)
 - b. Email
 - c. Status (Inactive or Active)

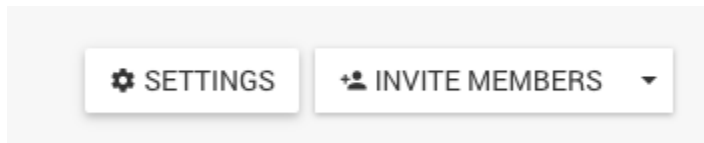
Here is an example of what your file should look like:

	A	B	C
1	Email	Position	Status
2	alex@presence.io	President	Active
3	mike@presence.io	Member	Active
4	franklin@presence.io	Member	Inactive
5			

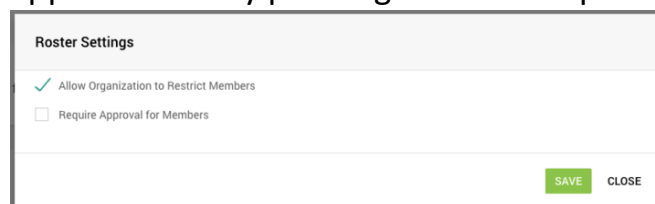
5. From here the system will validate your changes. After reviewing the changes, click **"Confirm and Import"**.

Organization Roster Settings

1. Type the name of your organization in the search bar and select your organization.
2. Click on the "Roster" tab.
3. Scroll down and click "Settings".



4. The Roster Settings page will appear and you can select the option(s) that are needed for your organization. Please note: in order to have the allow organization to add members without invite, you must first select "Allow Organization to Restrict Members".
 - a. Allow Organizations to Restrict Members - This allows organization admins to have the ability to select "Require Approval for Members".
 - b. Require Approval for Members- Allows admins of an organization to approve or deny pending member requests.

A screenshot of a 'Roster Settings' form. The title 'Roster Settings' is at the top. Below it, there are two options: 'Allow Organization to Restrict Members' which is checked with a green checkmark, and 'Require Approval for Members' which is unchecked. At the bottom right, there are two buttons: 'SAVE' (green) and 'CLOSE'.

5. Don't forget to click "Save" once completed!