



FBLA Connect Quick Guide – Adding Members & Paying Dues

Adding Students to a Chapter

Note: When students are added to a Chapter, their membership status is Unpaid. Purchasing membership is a different process.

1. From your Chapter website, click on Members>Add Member.

Test High School High School Chapter

Home Records Events **Members** Manage More... Setup Wizard >
20% Complete 3 of 15

[Add Member](#) [Transition Members](#) [Transition Officers](#) [Member Report/Export](#) [Manage Account Types](#)

Unpaid Students 4 Members

Sarah Test	Susan Brown
Sonia Talloo	Yumna Omran

Officers 1 Member

Marie Braatz President

Active Members 15 Members

Alex Anderson	Eric Jones	Madison Shen
Alice Pulugurtha	Fake Student	Maurya Ravichandran
Alison Vist	Gayle Robinson	Nadia Pinni
Anika Ryszkowski	Jahnavi Sharma	Test Adviser
Devdutta Wise	Karl Mikes	Test Student2

Advisers 6 Members

Gayle Robinson Primary Adviser	Robert Holst Primary Adviser	Tony Schmidt Primary Adviser
Katera Poma Primary Adviser	Susie Hudachek Primary Adviser	Zach Groff Primary Adviser

- You'll have 4 options to add members. Regardless of which option you choose, you should search for any members you believe may already be in the database because they were previously a member (e.g., former FBLA middle school student joining a high school chapter or current FBLA member transferring schools).

Remember, adding members (students) is a separate step from purchasing membership for them. Note: The system checks for duplicates using an exact match of First Name, Last Name, Email, and Chapter.

Test High School High School Chapter

Home Records Events Members Manage More... Setup Wizard 20% Complete 3 of 15

Add Unpaid Student

Choose one of the four options available to add contacts to your chapter.

Option 1: Add Existing Member
 Transfer students, or students graduating from another school to yours, may already be in the system.
 Search Member Database:
 Local Account Type: Unpaid Student
 Add Existing Member

Searching for students who have previously been FBLA members will keep all their FBLA membership history under a single record.
 If possible matches are found, the results will display the person's name and all previously affiliated chapters. Select the relevant student and click Add Existing Member.

Option 2: Manual Entry
 Individually enter each person's contact information to add them to your roster.
 Full Name: First Name, Middle Name, Last Name, Suffix
 Preferred First Name:
 Personal E-mail:
 Local Account Type: Unpaid Student
 Add Contact

Before adding a student, remember to first search for students who have previously been members (Option 1). If a match is found, you can add that student from Option 1.
 First time members, can be manually added via Option 2.

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)

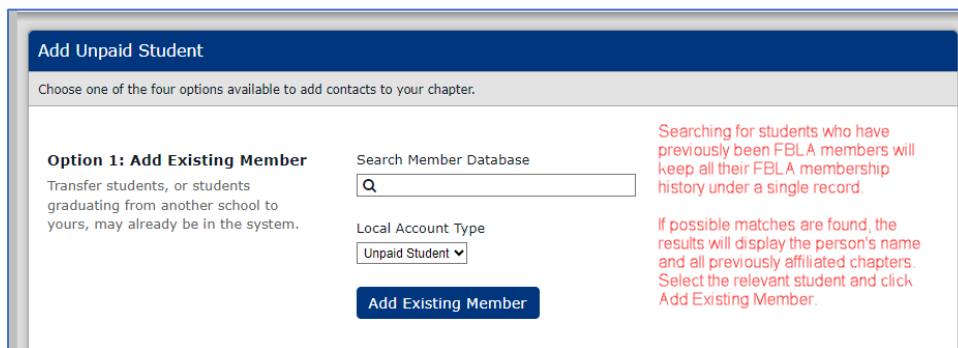
Before upload a file, remember to first search for students who have previously been members (Option 1). If a match is found, you can add that student from Option 1.
 First time members can be uploaded via Option 3.

Option 4: Registration Link
 Share a link to anyone who you would like to register to be added to your roster.
 Send this link to your high school chapter's public registration page. You will need to approve each account before they can log in:
 https://connect.fbla.org/testhighschool/register.php

Before sharing the Registration Link, remember to first search for students who have previously been members (Option 1). If a match is found, you can add that student from Option 1. You can share this link with first time members to register themselves via Option 4. You will be notified to approve each new registration.

Option 1

Use this option when you suspect a student has previously been an FBLA member or if you're searching to see if a student has previously been a member.



Add Unpaid Student

Choose one of the four options available to add contacts to your chapter.

Option 1: Add Existing Member
Transfer students, or students graduating from another school to yours, may already be in the system.

Search Member Database

Local Account Type
Unpaid Student

Add Existing Member

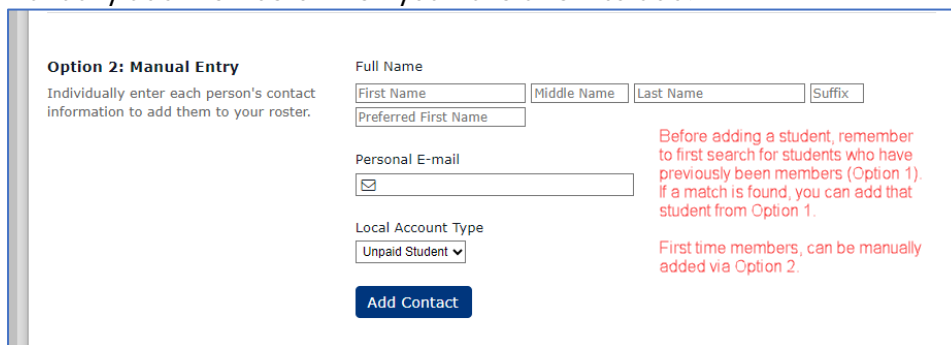
Searching for students who have previously been FBLA members will keep all their FBLA membership history under a single record.
If possible matches are found, the results will display the person's name and all previously affiliated chapters. Select the relevant student and click Add Existing Member.

Option 1 Steps:

- Enter the first and last name of the student. The system will display matches with the affiliated chapters.
- Select the record you want.
- Use the default Local Account Type of "Unpaid Student".
- Click Add Existing Member. You will remain on the same page, but a message will display alerting you if the contact was successfully added or if the contact is already on your roster.
- Go to the student's record to verify Grade and Gender.

Option 2

Manually add members when you have a few to add.



Option 2: Manual Entry
Individually enter each person's contact information to add them to your roster.

Full Name
First Name Middle Name Last Name Suffix
Preferred First Name

Personal E-mail

Local Account Type
Unpaid Student

Add Contact

Before adding a student, remember to first search for students who have previously been members (Option 1). If a match is found, you can add that student from Option 1.
First time members, can be manually added via Option 2.

Option 2 Steps:

- Enter at least First Name, Last Name, and Email.
- Use the default Local Account Type of "Unpaid Student".
- Click Add Contact.
- You will remain on the same page, but a message will display alerting you if the contact was successfully added or if the contact is already on your roster.
- Go to the student's record to add Grade and Gender information.

Option 3

Upload members when you have many to add.

Option 3 Steps:

- a) Click the Import Contact Data button and follow the steps on the page.

The following are the values for Grade

5
6
7
8
9
10
11
12
Collegiate Freshman
Collegiate Sophomore
Collegiate Junior
Collegiate Senior
Graduate
Alumni
N/A

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	Not Selected
Ash	Powers	ash@example.com	Collegiate Graduate	Male
Abby	Marks	abby@example.com	Alumni	Female

After entering the student contact information in the file, save it to your computer so that you can select it to be uploaded.

The following are the values for Gender

Male
Female
Not Selected

3 Upload CSV File

Select CSV file for import:

Choose File No file chosen

Import Unpaid Students

- b) After you've selected the file, click Import Unpaid Students.
 c) You'll be taken to a new screen with a message telling you if the import was successful or not.
 d) All students will be imported as Unpaid Students.

Option 4

Share a link with students that allows them to register themselves.

Option 4: Registration Link

Share a link to anyone who you would like to register to be added to your roster.

Send this link to your high school chapter's public registration page. You will need to approve each account before they can log in:

<https://connect.fbla.org/testhighschool/register.php>

Before sharing the Registration Link, remember to first search for students who have previously been members (Option 1). If a match is found, you can add that student from Option 1. You can share this link with first time members to register themselves via Option 4. You will be notified to approve each new registration.

Option 4 Steps:

- a) Craft an email and copy and paste the link into it.
 b) As students register, Members>View Pending Registrations; can open the record and approve or deny; approve goes to unpaid student

Purchasing Memberships for Students

Purchasing memberships in FBLA Connect is Transition to Member.


1. From your Chapter website, click on Members>Transition Members.

The screenshot shows the 'Test High School High School Chapter' website. The navigation menu includes Home, Records, Events, Members, Manage, and More... The 'Members' menu is highlighted. Below the navigation, there are buttons for 'Add Member', 'Transition Members', 'Transition Officers', 'Member Report/Export', and 'Manage Account Types'. The 'Transition Members' button is highlighted with a red arrow. The main content area is divided into sections: 'Unpaid Students' (4 Members), 'Officers' (1 Member), 'Active Members' (15 Members), and 'Advisers' (6 Members). Each section lists the names of the members.

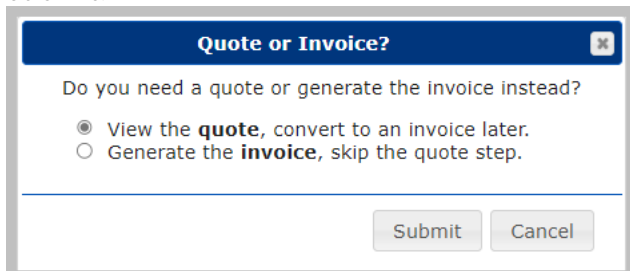
2. From the Unpaid Student column, select which students you want to purchase memberships for by clicking the checkbox next to their names.

The screenshot shows the 'Transition Members' page. It features three columns: 'Unpaid Student', 'Member', and 'Alumni'. The 'Unpaid Student' column is highlighted with a red arrow. Below the columns, there is a section for 'With selected unpaid students...' and a 'Transition to Member' button. The 'Transition to Member' button is highlighted with a red arrow. The 'Unpaid Student' column lists various students with checkboxes next to their names. The 'Member' column lists various members with checkboxes next to their names. The 'Alumni' column lists 'Alex Anderson'.

2.1. The pencil icon next to a student's name will take you to that student's record where you can update their information.

2.2. The  icon next to a student's name indicates the student is already on an unpaid Invoice.

3. When you've selected all your students you want to buy memberships for, click the Transition to Member button. You will be prompted to generate a Quote or Invoice. Select one and click Submit.



Quote or Invoice?

Do you need a quote or generate the invoice instead?

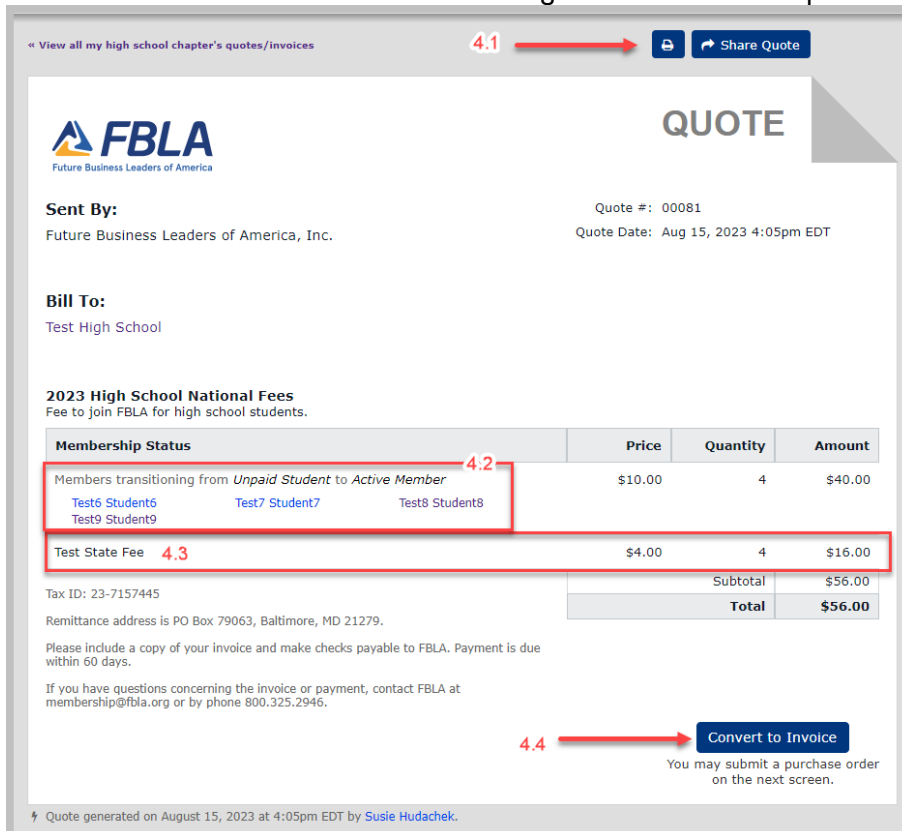
View the **quote**, convert to an invoice later.



Generate the **invoice**, skip the quote step.

Submit Cancel

3.1. Quotes are available if you need one to submit to your financial institution to acquire a Purchase Order. If you do not need a quote or will not be paying via a Purchase Order, you can skip the Quote step and immediately generate an Invoice.

4. Quotes – Students on Quotes are not eligible for membership benefits.



« View all my high school chapter's quotes/invoices 4.1 →   Share Quote

FBLA
Future Business Leaders of America

QUOTE

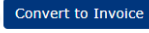
Sent By:
Future Business Leaders of America, Inc. Quote #: 00081
Quote Date: Aug 15, 2023 4:05pm EDT

Bill To:
Test High School

2023 High School National Fees
Fee to join FBLA for high school students.

Membership Status	Price	Quantity	Amount
Members transitioning from <i>Unpaid Student</i> to <i>Active Member</i> 4.2 Test6 Student6 Test7 Student7 Test8 Student8 Test9 Student9	\$10.00	4	\$40.00
Test State Fee 4.3	\$4.00	4	\$16.00
Subtotal			\$56.00
Total			\$56.00

Tax ID: 23-7157445
Remittance address is PO Box 79063, Baltimore, MD 21279.
Please include a copy of your invoice and make checks payable to FBLA. Payment is due within 60 days.
If you have questions concerning the invoice or payment, contact FBLA at membership@fbla.org or by phone 800.325.2946.

4.4 → 
You may submit a purchase order on the next screen.

Quote generated on August 15, 2023 at 4:05pm EDT by Susie Hudachek.

4.1. From the top right corner, you can print or share the Quote. Sharing a Quote will provide you with a unique link you can send to a third-party, who will be able to view the Quote without needing to have an account or log in.

4.2. The student names will display on the Quote.

4.3. Your state-division dues will display as a separate line item in addition to National dues.

4.4. When ready, you can convert the Quote to an unpaid Invoice by clicking the Convert to Invoice button.

5. Invoices – Invoices have 3 statuses: Not Paid, Pending, and Paid. Students on Pending and Paid Invoices will begin receiving membership benefits. From an unpaid Invoice, you can upload a Purchase Order or make a payment.

« View all my high school chapter's invoices 5.1 →

FBLA
Future Business Leaders of America

INVOICE

Sent By: Future Business Leaders of America, Inc. Invoice #: 00081
Invoice Date: Aug 15, 2023 4:05pm EDT
Due Date: Sep 14, 2023 11:59pm EDT

Bill To: Test High School **NOT PAID**

2023 High School National Fees
Fee to join FBLA for high school students.

Membership Status 5.1	Price	Quantity	Amount
Members transitioning from <i>Unpaid Student</i> to <i>Active Member</i> Test6 Student6 Test7 Student7 Test8 Student8 Test9 Student9	\$10.00	4	\$40.00
Test State Fee	\$4.00	4	\$16.00

Tax ID: 23-7157445	Subtotal	\$56.00
Remittance address is PO Box 79063, Baltimore, MD 21279.	Total	\$56.00
Please include a copy of your invoice and make checks payable to FBLA. Payment is due within 60 days.	Paid	\$0.00
If you have questions concerning the invoice or payment, contact FBLA at membership@fbla.org or by phone 800.325.2946.	Due	\$56.00

Payment via Purchase Order: \$

5.2 → No file chosen

5.3 →

5.1. Invoice Format

- 5.1.1. From the top right corner, you can print or share the Invoice. Sharing an Invoice will provide you with a unique link you can send to a third-party, who will be able to view and pay for the invoice without needing to have an account or log in.
- 5.1.2. The student names will display on the Invoice.
- 5.1.3. Your state-division dues will display as a separate line item in addition to National dues.

5.2. Purchase Orders – To Upload a Purchase Order, choose you file and then click Upload Purchase Order.

- 5.2.1. When a Purchase Order is uploaded, the invoice status changes to Pending. Invoices in a Pending state activate member benefits for the students. Invoices will stay as Pending for 60 days. If payment is not received within 60 days, Invoices will revert to an unpaid state and member benefits will revert to inactive.

5.3. Payment

- 5.3.1. You can apply an online payment to an invoice. Online payment options include: Visa, MasterCard, American Express, Discover, and ACH.

- 5.3.2. If sending a check payment, a copy of the Invoice MUST accompany the payment.
Check payments will be applied to invoices by the FBLA National Center.
- 5.3.3. When payments are applied, a payment receipt is emailed.