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.
2. 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.

**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.
Option 1 Steps:
a) Enter the first and last name of the student. The system will display matches with the affiliated chapters.
b) Select the record you want.
c) Use the default Local Account Type of “Unpaid Student”.
d) 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.
e) 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 Steps:
a) Enter at least First Name, Last Name, and Email.
b) Use the default Local Account Type of “Unpaid Student”.
c) Click Add Contact.
d) 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.
e) 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.

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 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.

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

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.

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.

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 your 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.