

OCONNECT

FBLA Connect Quick Guide – Chapter Setup

Setting Up Your Chapter

1. From your chapter's website, click the Setup Wizard.

The screenshot shows the FBLA Connect website interface for a chapter named "Test High School High School Chapter". The top navigation bar includes "Home", "Records", "Events", "Members", "Manage", and "More...". A "Setup Wizard" link is highlighted with a red arrow. Below the navigation bar, there is a "Conference Reg Is Open" section with a "Register here: LINK" button. A welcome message reads "Welcome Susie Hudachek!". There is a "Weekly event email digest" section with a "Sign me up!" button and a "No thanks" link. A red notification box states "Test High School has 9 unpaid invoices:" followed by a list of "2023 High School National Fees" and a dollar sign icon. At the bottom, there are buttons for "Does this look right?" and "Membership Status".

2. Complete the steps in the wizard. We've recommended which ones you should complete and which you can skip.

Test High School High School Chapter

Home Records Events Members Manage More... Search members or groups...

WELCOME TO FBLA CONNECT, SUSIE
This site is powered by [GreekTrack](#). Visit our [Learning Center](#) to get help setting up your new website!

Get started with FBLA Connect

- Create an account**
Create or claim your own account and log in. [skip this step](#)
Unnecessary - you already have an account
- Complete your profile**
Personalize your profile and add your contact information. [skip this step](#) **Complete**

Configure your site
Align FBLA Connect with how your high school chapter operates.

- Set your timezone**
Where in the world are you? [skip this step](#) **Complete**
- Complete your high school chapter's profile**
Update your institution, mailing address, etc. [skip this step](#) **Complete**
- Define achievements**
Encourage involvement with unlockable achievements. [skip this step](#) **Skip - complete later**
- Define your high school chapter awards**
Tell us what awards you give out each year. [skip this step](#) **Skip - complete later**

Officer onboarding
Invite your officers to log in to FBLA Connect.

- Define your officer positions**
Configure your high school chapter's officer positions. [skip this step](#) **Complete**
- Assign members to officer positions**
Determine which members hold which officer positions. Also add any advisers. [skip this step](#) **Complete**
- Instruct officers to create events**
Prepare your event calendar before inviting your active membership to log in. [skip this step](#) **Skip - complete later**

Invite your members
Now that your calendar has events, let's invite your members to activate their accounts.

- Review your membership roster**
Review imported members to ensure they are categorized correctly. [skip this step](#) **Skip - will be handled with membership**
- Add any missing members**
Invite any members that were missing from your membership roster in the previous step. [skip this step](#) **Skip - will be handled with membership**
- Send activation emails**
Send activation emails to your entire membership so they can start logging in. [skip this step](#) **Complete - after students are added**

Progress
33% Complete 4 of 12

How Setup Works

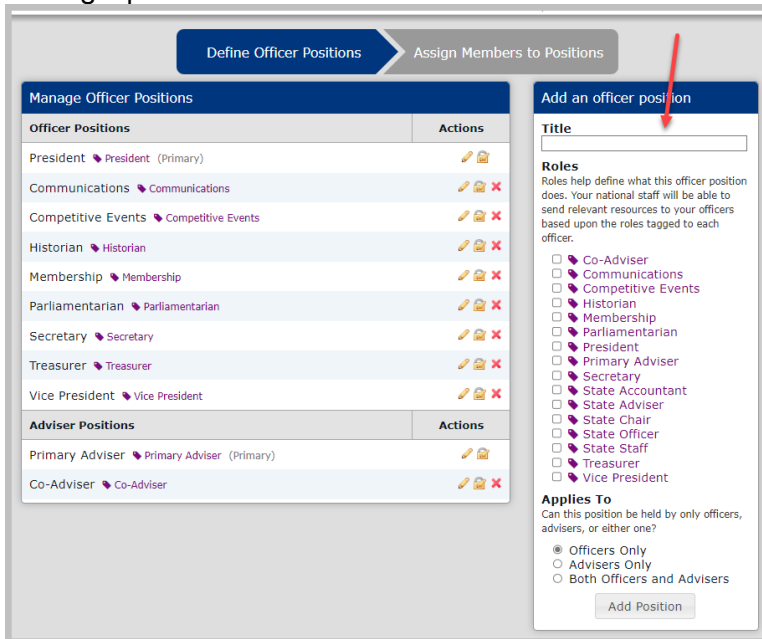
- 1 You configure FBLA Connect.
- 2 Next, invite your officers to add events.
- 3 Then, invite the rest of your members to log in and start signing up for events!

Officers Onboarding

Officers are students who hold officer positions at your FBLA chapter. There is a default list of officer positions for you; however, you can edit or remove them as well as add additional ones. We

recommend you review the default privileges set on the default list of positions. Note that each of your chapter's positions should be tagged with a National Center Role.

a) Adding a position



- a. Enter the name of the position in the Title field.
- b. Select the Role(s) to affiliate the new position with. (Roles are used to identify groups of people to message through FBLA Connect.)
- c. Select which group the new position applies to: Officers Only or Advisers Only (FBLA won't use Both Officers and Advisers).
 Officer Example: Chair Position with President Role
 Adviser Example: Finance Advisers with Co-Adviser Role
- d. Click Add Position.
- e. Privileges are attached to a position, not a person. After you create a new position you will be taken to a screen to assign privileges to this position (you may also return here to modify a position's privileges by clicking on the lock icon next to that position). Select to Allow or Disallow privileges and then click Update Privileges.

Edit Officer Position Privileges: Test Position

Access Privileges	Allow	Disallow
Configure Site Settings (Site Admin) [?]	<input type="radio"/>	<input checked="" type="radio"/>
Invite/Approve New Users to this Site & Manage Users' Account Type/Status Members with this privilege will receive an email notification each time someone registers and needs approval.	<input type="radio"/>	<input checked="" type="radio"/>
Edit Member Profile Information [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Fundraising Campaigns [?]	<input type="radio"/>	<input checked="" type="radio"/>
Post Announcements [?]	<input type="radio"/>	<input checked="" type="radio"/>
Send Bulk Emails [?]	<input type="radio"/>	<input checked="" type="radio"/>
Send Bulk SMS [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Achievements [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Meeting Minutes [?]	<input type="radio"/>	<input checked="" type="radio"/>
Excuse Absences for Required Events [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Awards and Award Voting [?]	<input type="radio"/>	<input checked="" type="radio"/>
Upload Files to the File Manager [?]	<input type="radio"/>	<input checked="" type="radio"/>
Create Forms [?]	<input type="radio"/>	<input checked="" type="radio"/>
Complete Forms Requested by Future Business Leaders of America staff [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Courses, Course Content, Setup Quiz Answer Keys, and Grade Quizzes [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage High School Chapter Store [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Communities [?]	<input type="radio"/>	<input checked="" type="radio"/>
Requirement / Point Tracker Privileges	Allow	Disallow
Manage Dues Requirement & High School Chapter Finances [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Meeting Requirement [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Service Hour Requirement [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Social Event Requirement [?]	<input type="radio"/>	<input checked="" type="radio"/>
Manage Other (Non-Associated) Events [?]	<input type="radio"/>	<input checked="" type="radio"/>

or

b) Editing existing positions

Define Officer Positions
Assign Members to Positions

Manage Officer Positions

Officer Positions	Actions
President ▼ President (Primary)	✎ 🗑️
Communications ▼ Communications	✎ 🗑️ ✖️
Competitive Events ▼ Competitive Events	✎ 🗑️ ✖️
Historian ▼ Historian	✎ 🗑️ ✖️
Membership ▼ Membership	✎ 🗑️ ✖️
Parliamentarian ▼ Parliamentarian	✎ 🗑️ ✖️
Secretary ▼ Secretary	✎ 🗑️ ✖️
Treasurer ▼ Treasurer	✎ 🗑️ ✖️
Vice President ▼ Vice President	✎ 🗑️ ✖️
Adviser Positions	Actions
Primary Adviser ▼ Primary Adviser (Primary)	✎ 🗑️
Co-Adviser ▼ Co-Adviser	✎ 🗑️ ✖️

Add an officer position

Title

Roles
Roles help define what this officer position does. Your national staff will be able to send relevant resources to your officers based upon the roles tagged to each officer.

- Co-Adviser
- Communications
- Competitive Events
- Historian
- Membership
- Parliamentarian
- President
- Primary Adviser
- Secretary
- State Accountant
- State Adviser
- State Chair
- State Officer
- State Staff
- Treasurer
- Vice President

Applies To
Can this position be held by only officers, advisers, or either one?

Officers Only
 Advisers Only
 Both Officers and Advisers

- Click on the pencil icon next to a Position.
- You can edit the Position Name, Role, and what group it applies to.
- When done editing, click Update Office Position.

c) Deleting existing positions

- Click the red X next to a Position.

d) Assign Members to Positions

- You can type in the name of the student or click Add Officer/Adviser link.
- When complete, click Update Officers and Send Activation Emails.

Invite Your Members

Only send activation emails to members after you've added them (see Adviser Quick Guide – Add Chapter Member and Buying Memberships). Student must have a login to access the learning management module within FBLA Connect.

a) Click Send Activation Emails

- Select which groups to invite by clicking the box next to the group.
- Click Send Email Invitations.