



# **VSBA Database**

## **How To Add A Billing Contact in the Database**



**First Step: Log into the Database, once you are logged in this is how the screen will appear. Please select on the relationships tab.**

VSBA  
TEST Clerk Profile

My Area > Welcome TEST Clerk Profile!  
Relationships ← **Click Here**  
Events >  
Accreditation >

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**Next Step: Once you click on the relationships tab it will open to the people tab.**

The screenshot shows the VSBA user interface. On the left is a navigation menu with the following items: My Area, Relationships, People, Events, and Accreditation. The 'People' item is highlighted in grey, and a red arrow points to it with the text 'Click Here'. The main content area displays 'Welcome TEST Clerk Profile!' and a large illustration of four people standing on a staircase of large speech bubbles. At the bottom of the page, there is a copyright notice: 'Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.



**Next Step: After you click on the people tab, you will need to click on the members tab. As this will be where you can see all of your members listed within the database.**

The screenshot shows the VSBA web application interface. At the top left is the VSBA logo. The main header area contains the text "Welcome TEST Clerk Profile!" and a user profile dropdown labeled "TEST Clerk Profile". On the left side, there is a navigation menu with the following items: "My Area", "Relationships" (expanded), "People" (expanded), "All People", "Members" (highlighted with a red arrow and the text "Click Here"), and "Staff". Below the navigation menu are "Events" and "Accreditation". At the bottom of the page, there is a copyright notice: "Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy" and the Engage logo.



**On the Members Tab this is where all of the members for your organization will appear. Please click on the persons profile that you would like to make the billing contact. Normally the clerk is the billing contact for the school division and you can have multiple billing contacts.**

VSBA TEST Clerk Profile

Home / Relationships / Members

Members My Display

MEMBERS Add Member AS OF 21 Jun 2021 Page [1/2] 10 of 17 Records

Favorites	Search Members	Primary Member Organization	Status	Added	Last Updated	Tags
★		Ball, Miranda	Augusta County	Active	01/19/2021	01/19/2021
★		Bond, Eric W.	Augusta County	Active	12/07/2020	04/28/2021 VSBA Dail...
★		Buehner, Marsha K.	Augusta County	Active	08/26/2020	02/08/2021 2015 Excel... ⋮
★		Collins, Nicholas T.	Augusta County	Active	08/26/2020	04/28/2021 VSBA Dail...
★		Cornell, Lora L.	Virginia School Boards As...	Active	02/24/2021	02/25/2021
★		Fritz, David	Augusta County	Active	01/19/2021	01/27/2021 News Media
★		Goforth, Tom T.	Augusta County	Active	02/16/2021	04/28/2021 VSBA Dail...
★		Kiracofe, Tina	Augusta County	Active	01/19/2021	01/27/2021 VSBA Dail...

Type here to search 87°F Sunny 1:07 PM 6/21/2021



After you selected the person's name, their record will pop up. Go to the three dots within the circle button and click there.

Click Here



Once you click on the button, select the “Mark as Key Contact” tab.

VSBA TEST Clerk Profile

Home / Relationships / Members / Members Detail

★ Marsha K. Buehner  
PID:MBKM2675 Status:Active Is an Instructor: No Roles: Board Clerk Person Type: Member

☆ Update Key Contact  
⊗ Deactivate the Person

Click Here

GENERAL DETAILS

Basic Information Political Associated Items Library

Edit

Email Address

Work <b>Primary</b>	Home
mbuehner@augusta.k12.va.us	twe3boys@gmail.com

Phone

Work <b>Primary</b>	Cell
(540) 245-5114	(540) 292-9463
Home	
(540) 292-9463	

Type here to search 87°F Sunny 1:15 PM 6/21/2021



A pop up will appear. Select the “billing” tab and select ok.

The screenshot shows a web application interface for the Virginia School Boards Association (VSBA). The main content area displays the profile of Marsha K. Buehner, including her name, PID (MBKM2675), and contact information under 'GENERAL DETAILS'. A modal dialog box titled 'Update Key Contact of "Augusta County"' is overlaid on the profile. The dialog contains a 'Select Contact type' section with the following options: 'award', 'billing' (checked), 'legislator', 'organizer', 'sponsor', and 'memberorglead'. A red arrow points to the 'billing' option with the text 'Click Here'. At the bottom of the dialog, there are 'Cancel' and 'OK' buttons. A second red arrow points to the 'OK' button with the text 'Click Here'. The background shows a sidebar with navigation options like 'My Area', 'Relationships', 'People', 'Members', and 'Events'. The Windows taskbar is visible at the bottom of the screen.



A green pop-up will appear after it is saved, letting you know it has been done.

**Just like this** → ✓ Marsha Buehner is marked as key Contact

Home / Relationships / Members / Members Detail

★ Marsha K. Buehner   
PID:MBKM2675 Status:Active Is an Instructor: No Roles: Board Clerk Person Type: Member

**GENERAL DETAILS**

Basic Information Political Associated Items Library

[Edit](#)

**Email Address**

Work <span style="background-color: #ffc107; padding: 2px;">Primary</span>	Home
mbuehner@augusta.k12.va.us	twe3boys@gmail.com

**Phone**

Work <span style="background-color: #ffc107; padding: 2px;">Primary</span>	Cell
(540) 245-5114	(540) 292-9463
Home	
(540) 292-9463	