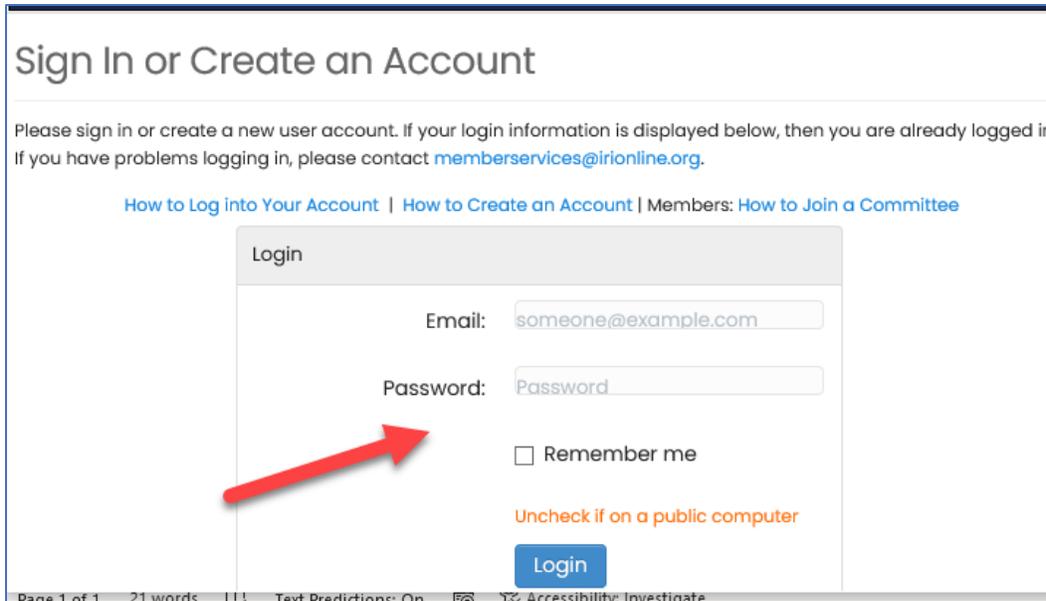
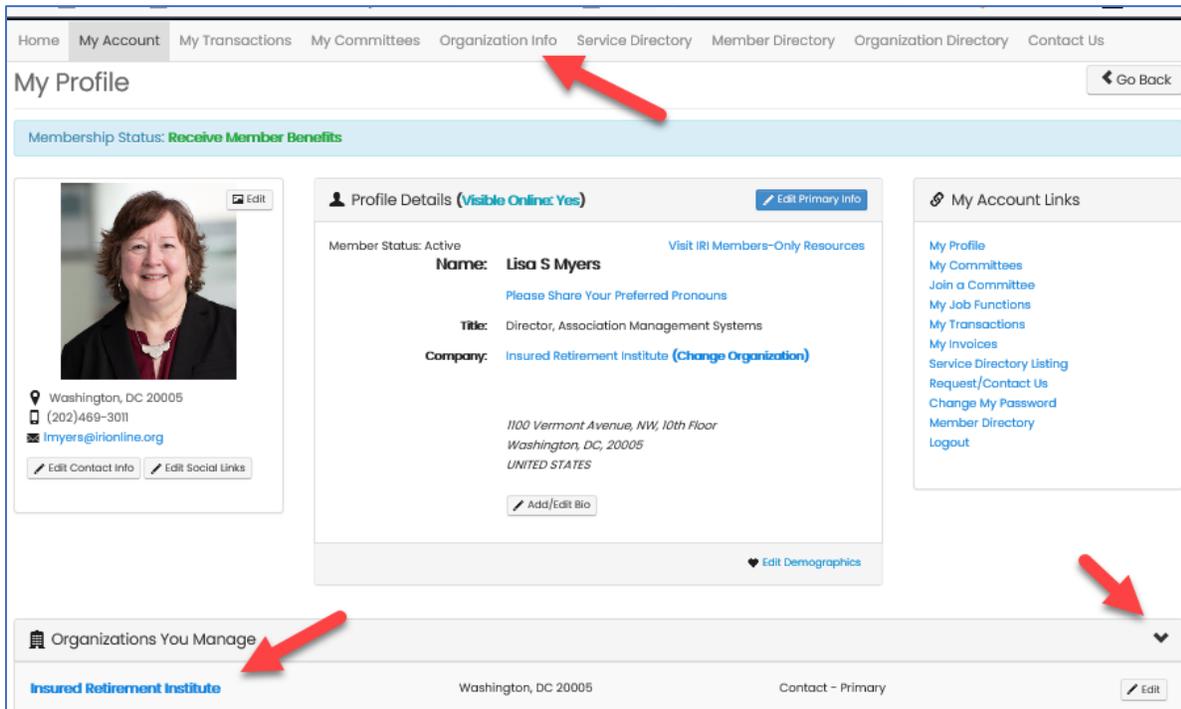


Primary, Billing, and Administrative/Records Keeping contact all have access to organizational information via the account portal.

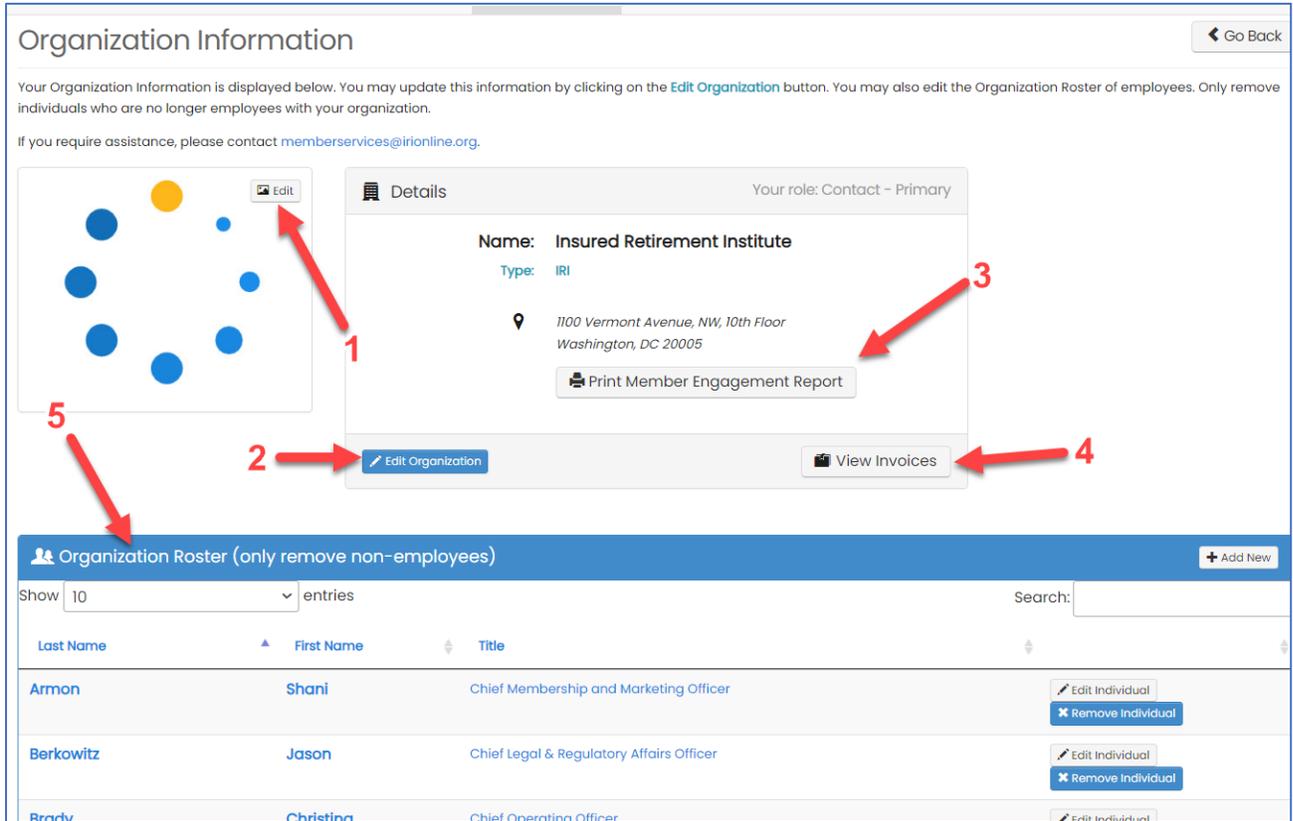
- 1) Log into [your account](#) by entering your email address and password and clicking the Login button. If you have difficulty logging in or resetting your password, email [memberservices@irionline.org](mailto:memberservices@irionline.org).



- 2) Click on the **Organization Info** in the top nav bar or on the name of your organization under the **Organizations You Manage** at the bottom of the page (click on the down arrow to list the organizations).



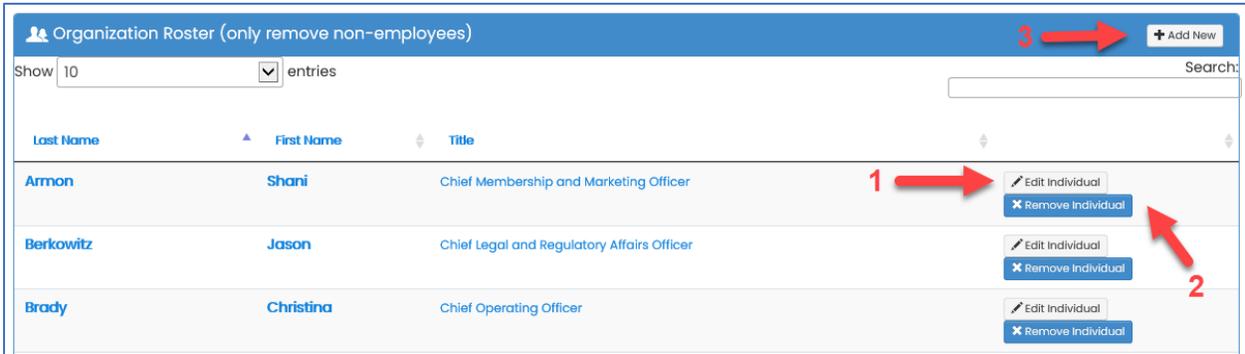
- 3) On the Organization Information page, you can 1) add or edit your company’s logo, 2) Edit the organization’s address and other contact information, 3) Print your organization’s member engagement report, 4) List and print invoices, 5) View and edit the employee roster.



- 4) To add or edit a logo, click on the **Edit** button (see 3.1 above) to launch this popup form. 1) Click on **Browse** to find the image file on your computer, 2) if you have already uploaded an image and wish to replace it, click the **Delete Uploaded Image** button, 3) once you’ve added the image you wish to upload, then click **Upload Image** button.



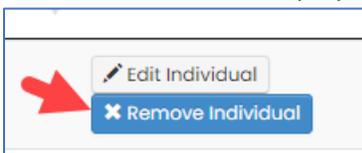
- 5) You can edit, delete, and add individuals under the Organization Roster. 1) You can add information regarding an employee including their title, email, phone, address. 2) You can delete employees who have left the company. 3) You can add new employees to the company roster.



- 6) To edit an individual's record, e.g., change their title, etc., click on the **Edit Individual** button (see 5.1 above) next to their name. Make changes and click **Save**.

The screenshot shows the 'Add/Edit Member' form. It is divided into three sections: 'Personal Information', 'Address Information', and 'Contact Information'. The 'Personal Information' section includes fields for Prefix (Please select), First name (Shani), Middle name, Last name (Armon), Organization (Insured Retirement Institute), and Title (Chief Membership and Marketing Officer). The 'Address Information' section includes fields for Address 1 (1100 Vermont Ave. NW 10th Floor), Address 2, City (Washington), State (DC), Zip code (20005), and Country (UNITED STATES). The 'Contact Information' section includes fields for Phone (2024693037), Phone ext., Fax, and Email (sarmon@irionline.org). At the bottom right, there are 'Cancel' and 'Save' buttons. A large red arrow points down to the 'Save' button.

- 7) You can delete a non-employee by clicking on the **x Remove Individual** button.



8) To add an employee, click on the **+Add New** button

Organization Roster (only remove non-employees) + Add New

Show 10 entries Search:

Last Name First Name Title

9) Complete the required fields and click **Save**.

Add/Edit Member Go Back

Personal Information

Prefix: Please select

First name: Required

Middle name:

Last name: Required

Organization: Insured Retirement Institute

Title: Required

Address Information

Address 1: Required

Address 2:

City: Required

State: Please select Required

Zip code: Required

Country: UNITED STATES Required

Province:

Contact Information

Phone:

Phone ext:

Fax:

Email: Required

Cancel Save

10) To print invoices, click on the View Invoices button (see 3.4 above). Click on Print next to the invoice and it will generate a PDF document that can be printed.

Purchased Products

Invoice #	Date	Product Name	Price	Qty	Balance	Returned/Cancelled?
122760	04/12/2024	2017 IRI Ops & Tech Conference Sponsorship - Coffee Breaks and Chocolates	\$0.00	1.000	\$0.00	0

Print

11) To edit your organization's information, click on the **Edit Organization** button (see 3.2 above). Make changes and click **Save**.

### Edit Your Organization

---

#### General Information

Organization:   
Required

Sort Name:   
Required

Type:

Acronym:

Tax ID:

Tax Exempt?

Attention:

---

#### Contact Information

Primary contact:

Phone type:

Phone number:

Phone extension:

Fax type:

Fax number:

Fax extension:

Email type:

Email:

Website type:

Website URL:

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#### Address Information

Country/Province:

Address line 1:   
Required

Line 2:

Line 3:

City:   
Required

State:   
Required

ZIP code:   
Required

Province:

County/district:

Mallstop: