



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

1) Log into <u>your account</u> by entering your email address and password and clicking the Login button. If you have difficulty logging in or resetting your password, email <u>memberservices@irionline.org</u>.

Sign In or Create an Account				
Please sign in or create a new user account. If your login information is displayed below, then you are already logged in If you have problems logging in, please contact memberservices@irionline.org. How to Log into Your Account   How to Create an Account   Members: How to Join a Committee				
	Login			
	Email:	someone@example.com		
	Password:	Password		
		🗌 Remember me		
		Uncheck if on a public computer		
Page 1 of 1 21 words	L Taut Bradictions: On EG	Login		

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.

Organization Informati	ion			K Go Back
Your Organization Information is displayed belo individuals who are no longer employees with If you require assistance, please contact mem	ow. You may update this informatic your organization. berservices@irionline.org.	on by clicking on the <mark>Edit Organization</mark> button. You m	ay also edit the Organization Roster of employ	ees. Only remove
e colt	Details Name: Type:	Your role: Contac	st - Primary	
	۹ ۱	1100 Vermont Avenue, NW, 10th Floor Washington, DC 20005		
2	✓ Edit Organization	Mark View	Invoices 4	
A Organization Roster (only rem	ove non-employees)			+ Add New
Show 10 v er	ntries		Search:	
Last Name 🔺 First	t Name 🍦 Title		4	÷
Armon Shai	ni Chief Mem	bership and Marketing Officer	Edit Individual     Remove Individual	1
Berkowitz Jasc	Chief Legal	& Regulatory Affairs Officer	Edit Individual     Remove Individual	1
Brady Cbri	stina Chief Oper	atina Officer	✓ Edit Individual	

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.

Le Organization R	oster (only remove non-err	nployees)	3 📥	+ Add New
Show 10	✓ entries			Search:
Last Name	First Name	≑ Title	▼	¢
Armon	Shani	Chief Membership and Marketing Officer	1 CERTIFICATION CONTRACTOR CONTRA	
Berkowitz	Jason	Chief Legal and Regulatory Affairs Officer	Edit Individual     Remove Individual	2
Brady	Christina	Chief Operating Officer	Edit Individual     Remove Individual	2

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**.

Add/Edit Member		Co Back
Personal Inforr	nation	
Prefix:	Please select 🗸	
First name:	Shani	
Middle name:		
Last name:	Armon	
Organization:	Insured Retirement Institute	
Title:	Chief Membership and Marketing Officer	
Address Inforn	nation	
Address 1:	1100 Vermont Ave. NW 10th Floor	
Address 2:	Requireo	
City:	Washington	
State:	Required	
	Required	
Zip code:	Required	
Country:	UNITED STATES  Required	
Province:		
Contact Inform	nation	
Phone:	2024693037	_
Phone ext:		
Fax:		-
Email:	sarmon@irionline.org Required	•
		ancel Save

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

	✓ Edit Organization	View Invoices	$\mathbf{N}$
🖳 🔔 Organization Roster	(only remove non-employees)		+ Add New
Show 10	<ul> <li>✓ entries</li> </ul>	Searc	h:
Last Name	▲ First Name 🖕 Title	\$	\$

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

d/Edit Member		Co Back
Personal Inforr	nation	
Prefix:	Please select	
First name:		
	Required	
Middle name:		
Last name:	Required	
Organization:	Insured Retirement Institute	
Title:		
Address h		
Address I.	Required	
Address 2:		
City:	Required	
State:	Please select 🗸	
	Required	
Zip code:	Required	
Country:	UNITED STATES	
Der la co	Required	
Contact Inform	agtion	
Contact mom		
Phone:		
Phone ext:		
Fax:		
Email:	Required	

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.

🛒 Purcho	ased Products	S					
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 Organizat	dit Your Organization			
General Inform	ation			
General Inform	dion			
Organization:	Insured Retirement Institute			
	Required			
Sort Name:	Insured Retirement Institute			
	Required			
Type:	IRI 🗸			
Acronym:	IRI			
,				
Tax ID:				
Tax Exempt?				
Attention:				
Contrat Inform	ation			
Contact Inform	lation			
Primary contact:	Myers Lisa S 🗸			
Phone type:	Business 🗸			
Phone number:	2024693000			
Phone extension:				
Fax type:				
En en esper	202-469-2030			
rox number.				
Fax extension:				
Email type:	business 🗸			
Email:	irionline@irionline.org			
Website type:	internet 🖍			
Website URL:	http://www.irionline.org			
Address Inform	Address Information			
Country/Province:	UNITED STATES			
Address li	ine I: 1100 Vermont Avenue, NW, 10th Floor			
Address II	Required			
Lir	ne 2:			
-				
Lir	ne 3:			
	City: Washington			
	Required			
St	tate: DC 🗸			
	Required			
ZIP c	ode: 20005 Required			
Provi	ince:			
County/dis	trict: District Of Columbia			
Moile	stor			
WOILS				