

DASHBOARD

The Dashboard section is the first page you will see upon login.



CBA
COMMUNITY BANKERS
ASSOCIATION OF GEORGIA

Cassie Cornell [logout](#) [Contact Us](#) 

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Member Compass™

- Dashboard**
- Pay Balance
- Account History
- My Events
- Profile
- Login & Password
- Payment Methods
- Logout**

Welcome to your CBA Member Portal!
From here you'll be able to update your profile, including what emails you would like to receive, pay invoices, and see your CBA events and CPE credits.

Awaiting Checkout

[Complete Signup >](#)

Pending

Advocacy Update

- Advocacy Update 2023 - Days 21-23**
February 24, 2023 by Lori Godfrey
- Interchange Fees**
February 24, 2023 by Lori Godfrey
- Interchange Legislation**
February 22, 2023 by Lori Godfrey

Career Center

- Director, HR Operations**
March 1, 2023
- Part Time Teller**
February 28, 2023
- Christy Wilmont**
February 22, 2023

PAY BALANCE

The **Pay Balance** tab shows transactions that have been billed to you. Primary Contacts, Billing Contacts, and those with management access will also be able to see open balances for your company, all sub-companies, and related people.

You have the option to select the **Full Balance**, **Overdue Balance**, or choose from **Specific Invoices**. For payment, you can use a previously saved Credit/Debit Card or add a new card.

If the you have not previously signed up for Auto-Pay for membership renewals, that option will be given in the **Payment** box. If you need to opt-out, you can so do in the **Payment Methods** tab.

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Which balance would you like to pay?

\$1,150.00 Full Balance	\$850.00 Overdue Balance	Specific Invoices
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Invoice	Due Date	Balance
<input checked="" type="checkbox"/> Dues Invoice #3399 James Fett / ABC School	10/20/22	\$850.00
<input type="checkbox"/> Dues Invoice #3463 James Fett / ABC School	11/17/22	\$300.00

Total Payment \$850.00

Payment

NAME ON CARD

VISA DISCOVER AMERICAN EXPRESS

CREDIT CARD NUMBER

EXPIRATION MONTH YEAR CVV

MONTH YEAR

BILLING STREET

BILLING CITY

STATE/PROVINCE POSTAL CODE

SAVE CARD FOR FUTURE PAYMENTS

AUTO-PAY FUTURE MEMBERSHIP RENEWALS

Pay Balance

ACCOUNT HISTORY

You have an **Account History** tab that will show transactions that have been billed to you. Here, you can view transactions, pay invoices, or print transactions in bulk.

Primary Contacts, Billing Contacts, and those with management access will also be able to see transactions billed to your company, all sub-companies, and other related contacts of your company.

Transactions are sorted by default in order of open invoices that are due. The "sort by" tool allows you to sort your transactions by balance, who was billed, transaction date, due date, status, and total. Note that the transaction status appears in the righthand corner of the transaction space.

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Batch actions SORT BY Open Invoices ▾

<input type="checkbox"/>	Dues Invoice - #3463			OPEN
	BILLED TO James Fett	TOTAL \$300.00	BALANCE \$300.00	Pay
	DATE 11/17/2022	DUE DATE 11/17/2022	View & Print	

<input type="checkbox"/>	Dues Invoice - #3399			OVERDUE
	BILLED TO James Fett	TOTAL \$850.00	BALANCE \$850.00	Pay
	DATE 10/19/2022	DUE DATE 10/19/2022	View & Print	

<input type="checkbox"/>	Payment			CLOSED
	BILLED TO ABC School	TOTAL \$300.00	BALANCE \$0.00	View & Print
	DATE 08/17/2022			

<input type="checkbox"/>	Dues Invoice - #3234			PAID
	BILLED TO ABC School	TOTAL \$300.00	BALANCE \$0.00	View & Print
	DATE 08/11/2022	DUE DATE 09/09/2022		

<input type="checkbox"/>	Dues Invoice - #2958			PAID
	BILLED TO ABC School	TOTAL \$250.00	BALANCE \$0.00	View & Print
	DATE 01/09/2022	DUE DATE 02/24/2022		

MY EVENTS

The **My Events** tab will show any upcoming events the you are registered for as well as events you have registered for in the past.

For past events, you can see what you have or have not been marked as "Attended" for and, for events that earned CEU(CPE) credits, you can download their **Continuing Education Report** directly from this screen.

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My Upcoming Events

Dec 8	Holiday Party 5:00 PM - 8:00 PM	Add To Calendar
Apr 12	Free Webinar - Just RSVP! 10:00 AM - 11:00 PM	Add To Calendar

Past Events

Find by event name

Continuing Education Report

SORT BY Date

Annual Meeting and Exposition			
DATE	LOCATION	CATEGORY	<input type="button" value="View Event"/>
03/10/2021 08:00 AM EST	Mandalay Bay Resort and Casino	Signature Events	

< FIRST PREVIOUS 1-1 NEXT LAST >

MY ORDERS

The **My Orders** section shows for any order purchasers. Here, you can see order information for orders you have placed, your order fulfillment status, and tracking number (if applicable), as well as subscription information.

Primary Contacts, Billing Contacts, and those with management access will also be able to see orders and subscriptions billed to your parent company.

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Logout

Subscriptions

AONW Training Manual			
PURCHASED BY James Fett	AMOUNT PAID \$250.00/yr	SUBSCRIPTION START 10/19/2022	Cancel Subscription
SUBSCRIPTION END 10/19/2023			

Orders

Find by order #

SORT BY Date ▼


Order #8882205				FULFILLED
PURCHASED BY James Fett	TOTAL \$250.00	DATE 10/20/2022	View	
Order #8882013				FULFILLED
PURCHASED BY ABC School	TOTAL \$100.00	DATE 08/27/2021	View	
Order #8881944				FULFILLED
PURCHASED BY ABC School	TOTAL \$100.00	DATE 03/31/2021	View	

< FIRST PREVIOUS 1-3 NEXT LAST >

PROFILE

All individuals will be able to edit their profile information - such as contact information and custom fields.

For data cleanliness & security reasons, individuals must contact CBA to change their first or last name.



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FIRST NAME	LAST NAME
Cassie	Cornell

COMPANY

Community Bankers Association Of Georgia

If you need to edit your name, please [contact us](#).

Profile Information

EMAIL *


cassie@cbaofga.com

PHONE *

7705410378

MOBILE

FAX

BILLING ADDRESS 

LOGIN & PASSWORD

The **Login & Password** section allows you to see your main **Contact Email** and **Login Email**, and to edit your login email and password. Note that you must know their current password to make these changes.

The screenshot shows the 'Member Compass' interface. On the left is a navigation menu with options: Dashboard, Pay Balance, Account History, My Events, Profile, Login & Password (highlighted in green), Payment Methods, and Logout. The main content area is titled 'CONTACT EMAIL' with a sub-note: 'To change your contact email, please update your profile.' Below this is a text input field containing 'cassie@cbaofga.com'. The next section is 'LOGIN EMAIL *' with an empty text input field. This is followed by 'NEW PASSWORD' (with an eye icon) and 'CONFIRM NEW PASSWORD', both with empty text input fields. A 'TWO-FACTOR AUTHENTICATION' section shows a red dot and the text 'Off' next to a right-pointing arrow. At the bottom, the 'CURRENT PASSWORD *' section has a sub-note: 'In order to update your login email or password, we need you to confirm your current password.' and an empty text input field. A dark blue 'Save' button is at the very bottom.

PAYMENT METHODS

In the **Payment Methods** tab, members can add, update, or delete saved credit cards.

The screenshot shows the Member Compass interface. At the top, there's a dark blue header with the Member Compass logo and a '+ Add New Card' button. Below the header is a sidebar with navigation options: Dashboard, Pay Balance, Account History, My Events, Profile, Login & Password, Payment Methods (highlighted in green), and Logout (highlighted in green). The main content area displays three credit cards:

	Visa (...1111) Sam Morgan	Exp. 09 / 2024	★ Default 🗑️ Delete
	American Express (...3620) Sam Morgan	Exp. 07 / 2024	★ Make Default 🗑️ Delete
	Visa (...5529) Samuel Morgan	Exp. 03 / 2021	★ Make Default 🗑️ Delete

Below the cards, a note states: "Note: Your membership is currently setup to auto-pay using your default payment method. If you'd like to discontinue auto-pay, please click here."

In addition, if you previously opted-in to use your card to Auto-Pay Membership Renewals, you can opt-out in this tab. A warning box like the one below will display:

The warning dialog box features a red exclamation mark icon on the left. The text reads: "Are you sure you want to disable auto-pay? Failure to pay your next renewal on time could result in a lapse of membership." Below the text is a horizontal line, and at the bottom are two buttons: "NO" (white with black border) and "YES" (orange).

Sections available to only company Primary Contacts, Billing Contacts, or users with management access to a company:

COMPANY / COMPANIES

This section allows users with company privileges to edit company information such as contact info and custom field information. The label will depend on whether you have access to one company or multiple companies. If multiple, the tab will display a list of all the companies you have access to.

Note: These users will not be able to edit the company's name.

PEOPLE

Here, users with company privileges can add and remove people members from the company's **People** list. They can also assign open seats to people to self-manage their own member benefits.