DASHBOARD

E Logout

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

February 24, 2023 by Lori Godfrey

Interchange Legislation February 22, 2023 by Lori Godfrey



February 28, 2023 Christy Wilmont

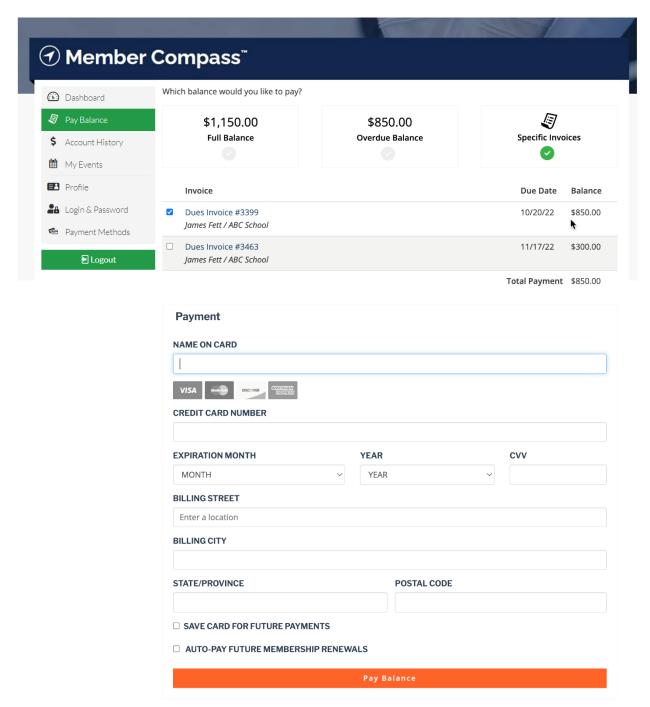
February 22, 2023

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.

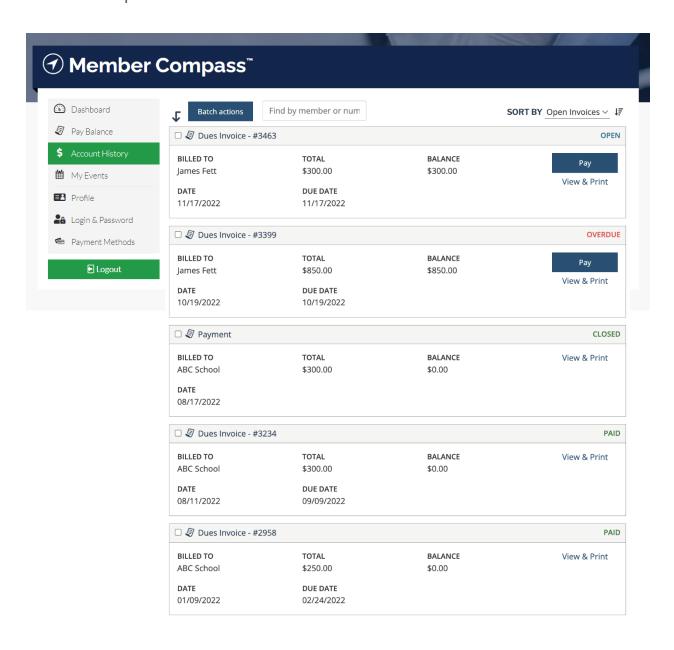


ACCOUNT HISTORY

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.

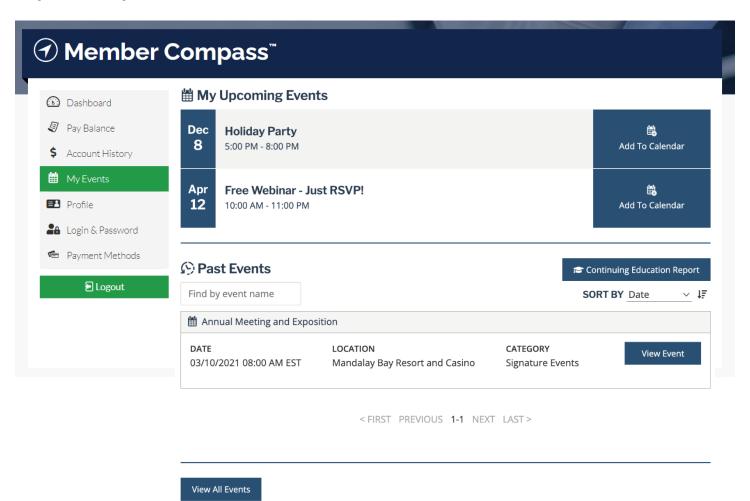
Transactions are sorted by default in order of open invoices that are due. The "sort by" tool allows you to sort your transactions by balance, who was billed, transaction date, due date, status, and total. Note that the transaction status appears in the righthand corner of the transaction space.



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.

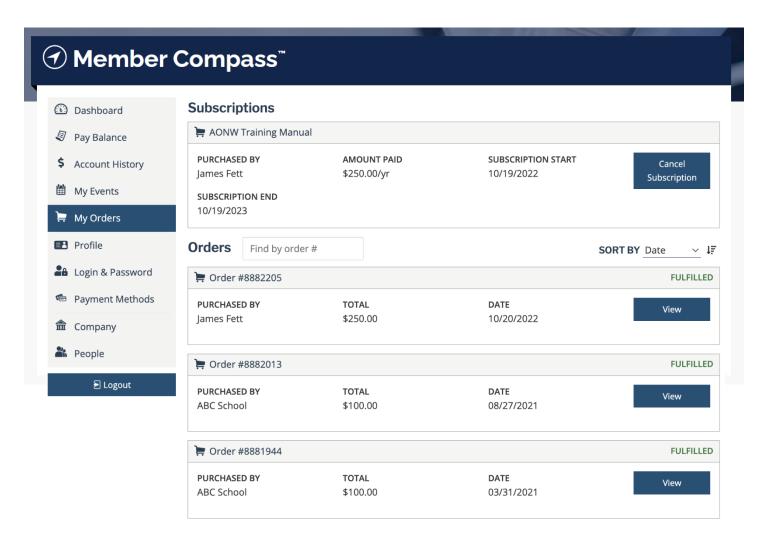
For past events, you can see what you have or have not been marked as "Attended" for and, for events that earned CEU(CPE) credits, you can download their **Continuing Education Report** directly from this screen.



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.

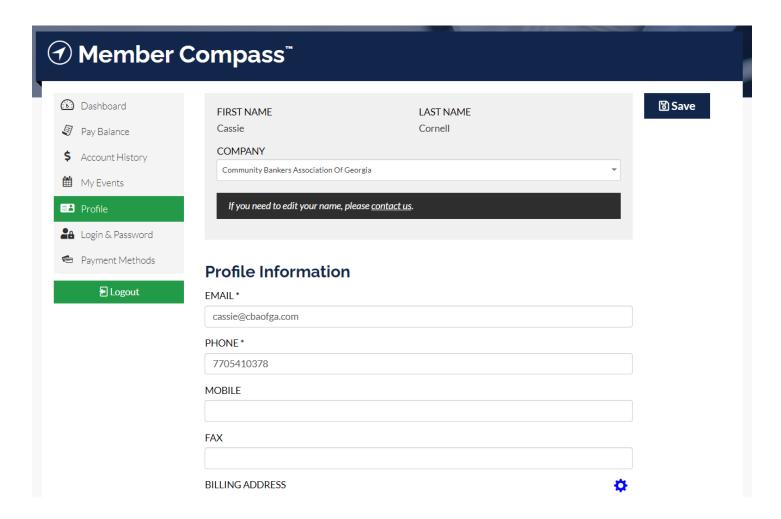


< FIRST PREVIOUS 1-3 NEXT LAST >

PROFILE

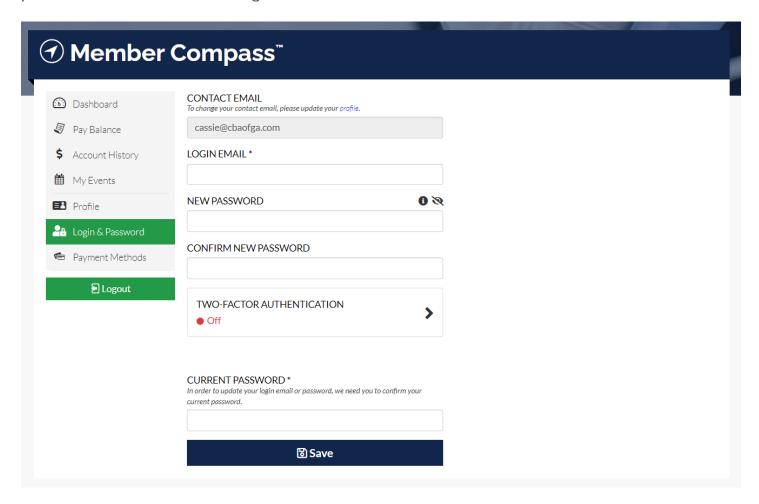
All individuals will be able to edit their profile information - such as contact information and custom fields.

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



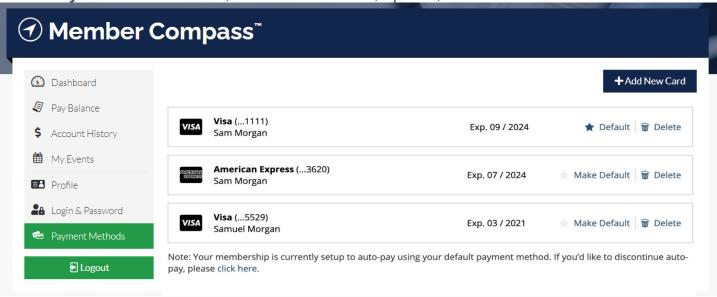
LOGIN & PASSWORD

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.

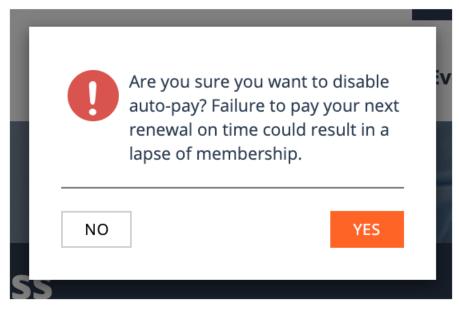


PAYMENT METHODS

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



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:



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.