

Chapter Portal- Component Edit Functionality (May 2022)

In service to your members, you may now edit select fields in a member contact record. Should your members prefer, they can manage this information by logging into AIA.org (dropped into My Account by default) and click on the “edit” button within the Manage tile.

“Details” tab

Contact:

1. First and Last Name: View only.
2. Name Suffix: View only.
3. Other Credentials: Add, Edit or delete

Note: For name, please contact memberservices@aia.org for assistance.

Address:

1. Home address: Add or edit
2. Org (Account): Add or delete
3. Do not contact by post: *Check or uncheck

Note: *Checked effects all mail including a hardcopy *Architect* Magazine.

Email:

1. Preferred Email type: Edit
2. Personal Email: Add or edit
3. Work Email: Add or edit
4. Do not contact by email: *Check or uncheck

Note1: *Checked effects all emails including receipt of digital *Architect* Magazine.

Note2: For security reasons, editing an email is a two-step process detailed below.

Membership Info:

No fields are editable. Please contact memberservices@aia.org for assistance.

Demographics:

1. Birthdate: View only.
2. Gender identity: View only.
3. Diverse ability: View only.
4. Primary Race/Ethnicity: View only.
5. LGBT: View only.
6. Gender: View only.

7. Ability Notes: View only.
8. Secondary Race/Ethnicity: View only.
9. Ethnicity (Self-describe): View only.

Note: Due to the sensitivity of select information, members must manage these details within My Account.

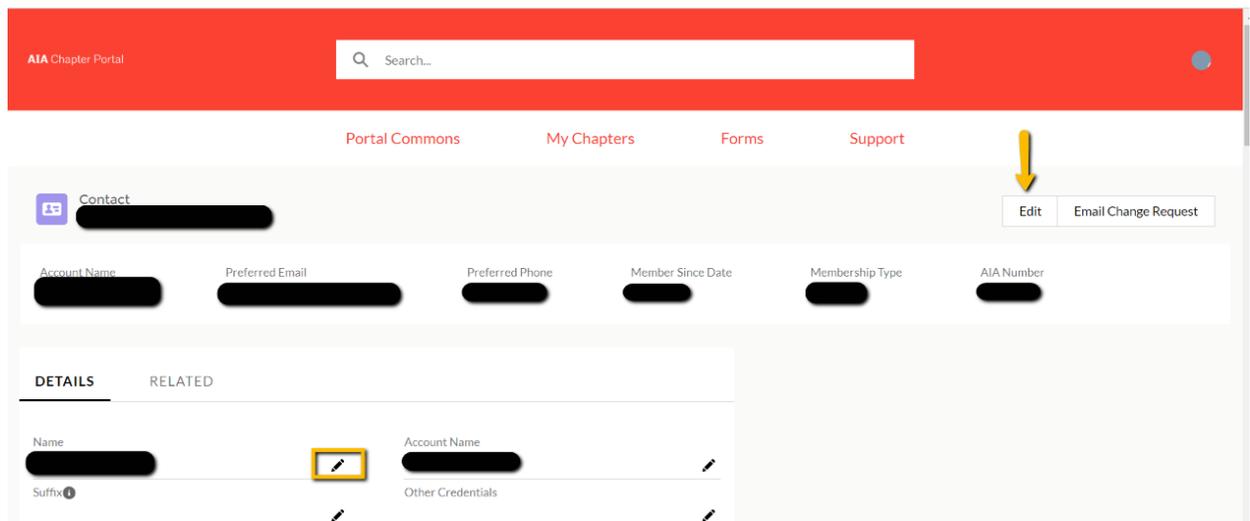
“Related” tab

Professional and Accounting:

1. Active licenses: Add and View only
2. Education: Add and View only
3. Receipts: View only

Accessing a contact record:

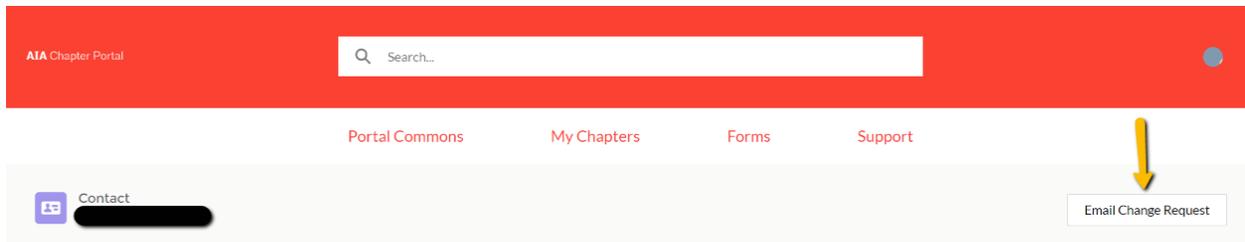
1. Log into the Chapter Portal
2. Find a contact (a) using Global Search (name or AIA #) at the top center or (b) select a contact within a report (ex: active member roster).
3. Once on the contact record, edit applicable fields (detailed above) by way of the pencil icon or click Edit.



Updating Email information:

Per industry standards and best practices, updating an email address requires the user/member to take final action. **After you update select email address, the member will receive an email (from account-noreply@aia.org) at the new email address that requires them to click on an embedded link within 24 hours to finalize the email update.**

1. Click on Email Change Request



2. You can update the personal and/or work email address.
3. The “Preferred Email Type” (personal and work) and the corresponding **new** email address are aligned. This will trigger the email notification that requires your member to validate and finalize. If you update the email of the **non**-preferred email type, it will save but this will not require the member to take additional action.
4. Next/Save
 - Note1:** Once the preferred email type and new email address is updated, it’s imperative that the member act within 24 hours before the confirmation link expires.
 - Note2:** If your member does not click on the link within 24 hours, please return to the “Email Change Request” to cancel and to start again.