National Portal SOP
February 2023

The Fonteva National Portal application gives staff a view into Fonteva, AIA's membership database. The National Portal is a cost effective, community specific view, with greater mass access potential, and it can be configured to meet core Fonteva needs for non-super users.

At this time, users can search for and view records in the Fonteva database and view details on each record. In Phase 2, we will be adding reports so you can run and export data from the Fonteva database.

AIA National Portal   Q Search...

News and FAQs   Contacts   Accounts   Communities

LOGIN
Access to the National Portal is available through Okta. After you attend the training, access to the NP site will be added to your User Profile.

There are four different tabs and a global search bar available on the National Portal. Details below on what each tab contains and how to use the global search.

NEWS AND FAQs PAGE
After accessing the National Portal from Okta, you will land on the News and FAQs page. The page will allow us to add and update FAQs quickly and post news and updates which will affect your use on the National Portal.

GLOBAL SEARCH
At the top of the National Portal is a Global Search bar. Entering keywords into the search bar will help identify results and see the top 5 results in Accounts and Contacts. If you see the result you are looking for, select the record to be directed to the Contact or Account record for more details.

If there are more than five results in either Accounts or Contacts, you can see more results using one of two options. You can click on the "View More" button on the right side of the results box to expand the list of results or you can choose Contacts or Accounts from the left navigation bar to expand the list of results. If there are more than 50 results after using View More, scroll to the bottom of the list and select "Show More" button.

Once you are viewing the larger list of results, you will see "Refine By" fields on the left navigation bar to help you narrow down the results even further. There are ten different filters you can use to narrow down the results.
- Name
- Account Name
- AIA Number
- Status (member status of Active, Terminated, Non-Member, Lapsed or Deleted)
- Phone

- Email
- State Chapter
- Membership Type
- Local Chapter (do not need to include AIA in search, just the name of the local component)
- Official Section Assignment (format for this field does not include AIA so just enter the section name without AIA)

Select the record you want to view to see more details on the Contact or Account record. TIP: When selecting one record from a list, you can right click on the one record you want to review and then select "Open link in new tab" so you can view the one record and, when done, close the tab to go back to the full list of records. You can also use the Back button if you open one record from a list in the same window.

CONTACTS

The Contacts tab is available for you to view individuals (Contacts) from the Fonteva database. The default View is to show "All Contacts" with a record in the Fonteva database and there are currently over 700,000 Contacts. To help users narrow down the results, you can go to the Contacts View dropdown and choose from one of the following Views:
- Active Members
- Emeritus Members
- Fellows
- Lapsed Members
- Members under CES Audit
- Recently Viewed (and Recently Viewed Contacts – same results)
- Terminated Members

Results listed under a particular view will show you a snapshot of a Contact's information. Hyperlinks are available on the Name, Account Name and Email fields. If you click on a Name field, you will be directed to the Contact or Account record. If you click on the Email, a Microsoft Inbox window will open so you can send an email.

The results list will display the first 50 records. As you scroll down to the 50th record, the application will display the next 50 records. As you continue to scroll down the list, the next 50 results will be exposed.

You will notice Contacts listed with an Account Name ending in "Person". Fonteva is built on the Salesforce platform. Salesforce requires all Contacts to be linked to an Account (organization) record. If a Contact does not enter an Account when creating their record, Salesforce will create an Account automatically, using the First Name and Last Name of the Contact and adding "Person" on the end of the Account Name field. When we create reports for the National Portal, we will use a custom field to remove the "Person" Accounts from the results list.

ACCOUNTS

The Accounts tab is available for you to view organizations (Accounts) from the Fonteva database. The default view is set as "All Accounts", currently over 680,000 records. There are many Views available for users to view under the dropdown.

The results list will display the first 50 records. As you scroll down to the 50th record, the application will display the next 50 records. As you continue to scroll down the list, the next 50 results will be exposed.

You will notice Accounts ending in "Person" on the Accounts Views. As noted under Contacts, Salesforce requires all Contacts to be linked to an Account (organization) record. If a Contact does not enter an Account when creating their record, Salesforce will create an Account automatically, using the First Name and Last Name of the Contact and adding "Person" on the end of the Account Name field.

COMMUNITY

The Communities tab will show you a number of different types of Groups managed in Fonteva. The list will include State and Local Components, Voluntary Sections, Knowledge Community groups, and Committees. The groups are hyperlinked so you can click on the Community you want to view and be directed to a screen to view details of the Community Group.

TIPS AND NOTES:

- Click the Pin icon by the View Dropdown list to "save" the view you want to see when accessing the Contacts, Accounts or Communities tab. If you don't Pin a view, the default will be "All Contacts", "All Accounts" or "All Communities".
- Currently, there is no way to filter results from one of the views on a tab.
- Currently, exporting a full list of results from a particular view is not available.
- To change the sort order of a View on any result list, click on the column header you want to sort on which will update the view.
- To open up one record from a list, use right click on your mouse and select "Open in new tab". When you are done viewing the record, close the tab and be redirected back to the full list.
- Emails on Contact and Account records are hyperlinked. Clicking on the email address will open up an Outlook window (if you have this function setup) so you can email immediately.

NEED HELP or HAVE AN IDEA?
If you are stuck and need some help, reach out to the Digital Support team (digitalsupport@aia.org).

Have an idea or offer feedback on how to make the National Portal site more useful? Send you idea in through the Survey Monkey site: https://www.surveymonkey.com/r/Q6FLTHF.