

BuilderFusion Member Center Instructions

Welcome to the BuilderFusion Member Center. This site is hosted by BuilderFusion, but is operated by the Home Builders Association of Billings. This system allows you to register for member events, update your personal member information, and stay current to what is going on within the association.

The following instructions will help you to navigate the member center and should address any questions you may have.

HOME

You will notice on the home page you can view your spike credits, your start date, and your next renewal date. If you feel any of this information is incorrect please contact the HBA office (406-252-7533).

You will also notice that you can view the upcoming events for the HBA. By clicking on any event you can learn more about the event and you can register for any events that are open to the entire membership. Please note that you will not be able to register for any committee meetings or board meetings unless you are currently serving on that committee or board.

Below the calendar you can see important messages. These are messages sent by the HBA office. The last line you see is the Advertising & Contribution Opportunities. We have not started posting any opportunities here at this time, but we will let you know when and if we post any opportunities to this area.

EVENTS

In the upper corner of the page you will see three links: **Home**, **Events**, and **My Profile**. We have already navigated through the Home Page, but if you ever want to return to this page simply click the home link and you will be redirected to the home page.

The next page you can access is the Events page. If you roll your mouse over the Events link you will see three additional links appear below: *Current Month*, *Summary*, and *Add Event*. You can click on any of these links and you will be redirected to that page.

Current Month

The first link entitled *Current Month* will allow you to see all HBA events in a calendar format. As on the home page you can click any link to find out more about the event. You can also use the arrows at the top of the calendar to look ahead at what events are coming up in the next months. You can also search backwards to see what you may have missed.

The last part to the *Current Month* page is a drop down menu that says "All Events." The drop down menu enables you to search by event type. You can search for All Events, Classes, GRIP Safety Training (blue), and Personal Events. Personal Events are events you

choose to add to your calendar. Additional event types can be added by the HBA office as necessary.

Summary

By rolling your mouse over the Events link again you can see a link entitled *Summary*. This feature is very similar to the Current Month link except it shows the events in a list format rather than the calendar format. You can still search with the drop down menu and click on events to find out more about the event.

The one addition to this page is at the bottom you can add an event to the calendar. This will be a Personal Event and will only show on your calendar. This is personal to your log-in, so it can't be seen by the HBA office or any other member. You can add/delete/edit your personal events at any time.

To add an event, click on the link "Add New" at the bottom of the page. A screen will pop up for you to fill out. Any field marked with a red asterisk is required and must be entered before saving. Just fill in the appropriate information and click the save button and it will be saved to your calendar. At the bottom of the add event page there is a blue box labeled "Reminders." The BuilderFusion system will send reminders to you about your event at the intervals listed. For example if you check the 1 week box you will get an e-mail reminder 1 week before the event.

Add Event

The last page under the events link is the *Add Event*. This is just another way to add an event to your personal calendar. It works exactly the same way as adding an event under the *Summary* link. The directions above will explain how to add an event to your personal calendar.

MY PROFILE

The last part of the BuilderFusion Member Center is the *My Profile* link. This is where all your company and contact information is stored. To access this page simply click on the link labeled *My Profile*. You will see a page that has all your membership information. Right under the *My Profile* banner you will see 6 labeled columns. These are part of your membership profile. You can click on any of these columns to review your membership information related to the heading title.

Contact Info

This is the page BuilderFusion defaults to when you click the My Profile link. Listed here is all the company information and personal information you have provided to the HBA office. This is also where you can change your username and password if you choose. If you forget your username or password you can contact the HBA office or use the link on the log-in page to have it e-mailed to you.

Also, on the contact info page you can opt out of messages sent by the HBA office. For example if you no longer want to receive meeting reminders just click that button under the global opt out heading in the lower right hand corner of the page.

NAHB Info

Directly to the right of the *Contact Info* link is a link to the *NAHB Info* page. Under this page you can view your Spike. If you would like to change your Spike you will have to contact the HBA office, as you are not able to change this field. Also, on the *NAHB Info* page you can update your business activity and title. The fields available under business activity are created by NAHB for their purposes. These are not the business activities the HBA office uses when putting the Membership Directory together.

Business Activities

Under the *Business Activities* tab you can add additional information for your company. You can enter your contractor license number, the price range of the homes you build, the counties you work in, years in business, and any certifications or designations you may hold.

One of the most important things you can do under this tab is choosing your Business Activities. When the HBA office puts together the Membership Directory we pull directly from this page. As you can see you can choose up to 2 business activities and you must choose a category from the provided list. If you don't see categories that will work for your business, please contact the HBA office and we will try to make arrangements to add a category for your needs.

Association

Under the *Association* tab you can view your membership start date, your status, and when your membership is up for renewal. You can also see what the renewal price per year is for your membership. You are not able to change any of these fields, but if you feel any information is incorrect please contact the HBA office.

References

Under the *References* tab you can add as many references for you or your company as you choose. If someone contacts the HBA office asking about your company we can provide any potential customers with a list of references for your company. To add a reference simply click on the "Add a Reference" link and fill in the appropriate information. As before any field marked with a red asterisk is required in order to save.

Additional Info

Under the *Additional Info* tab you can view any additional information the HBA office has posted about your membership.

Go To:

When you are in the *My Profile* section there is also a drop down menu located in the upper right hand corner (directly under the "send a message to the association" link). This drop down menu allows you to view additional information about your membership.

- The first item in the drop down menu is *Committee and Council*. This allows you to view any committees or councils on which you are serving. These fields can't be changed, but if there is any incorrect information please contact the HBA office.

- The second item in the drop down menu is *Leadership Positions*. This will show you if you have been assigned to any leadership positions such as HBA president or committee chair. These fields also cannot be changed.
- The third item on the drop down menu is *Expenses*. This will show any outstanding invoices associated with your membership. As of right now the office does not use BuilderFusion to invoice our members, so you should not have any outstanding invoices.
- The fourth item on the drop down menu is for *Dependants*. Please do not add any dependants under your membership. If you add a dependant the office will not approve the changes. If you would like any of your employees to receive communications from the HBA office please contact us about an Affiliate Membership.
- The last item in the drop down menu is *Government Affairs*. Currently we do not have the feature enabled, but we will keep you informed as to the status of this feature.

You should also be aware that all changes you make to your profile information will be reviewed by the office and either approved or declined. If you make changes and they are not changed the next time you log-in, the office may have declined the changes. If the HBA declines the changes an explanation will be sent to your mailbox. If you have any questions/concerns about this feature please contact the HBA office.

Help

In the upper right hand corner of the page you will find a link to the Help section. You can access this help option while you are in any section of the website. This section provides frequently asked questions about the BuilderFusion Member Log-In Center. This is a very helpful resource and can be used as a supplement to these instructions. There are a few inconsistencies in this help menu, so if you are having trouble with anything please contact the HBA office.

NOTE: Q4 under the Home Page heading refers to a program that is not yet available from BuilderFusion and will not show up on your home page.

We want to ensure that these instructions are accurate for our members. If you see any errors in this document, please contact the HBA office (406-252-7533) and we will remedy the problem right away. Thank you for logging in to the BuilderFusion Member Center!