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| Basic Navigation Tips | |
| Global Search  Not numbered or bulleted by default. | |
| Steps   1. At the top of every screen, you will see a gray magnifying glass. Click on this from any screen to search for a member, family, invoice, email address or event registration. 2. Click on the record you would like to access and click View. | Screenshots  *(Screen appearance may vary per state)*  A screenshot of a cell phone  Description automatically generatedA screenshot of a social media post  Description automatically generated |
| Return to a Recent Member Profile | |
| 1. To return to a member’s profile that you have recently viewed, click on the member’s name in the right-hand pane titled Recent Member Profiles. 2. If you do not see this pane, try to zoom out in your browser (ctrl + - ).   **NOTE**: You will not see this pane while you are logged in to a member or family profile. | A screenshot of a cell phone  Description automatically generated |
| Return to the Manager Account | |
| 1. When you click to view a member from the Member Search or the Global Search, you will land in the family or member profile. 2. Click the orange up arrow at the top right to return to the Manager account. | A screenshot of a cell phone  Description automatically generated |

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| Switch to a Different County | |
| 1. If you have been assigned permissions for more than one County or are a District, Region or Institution Manager, you may navigate to a different account for which you have permissions by clicking on the drop-down next to your name at the top right of the screen. 2. Select Change Hierarchy. | A screenshot of a cell phone  Description automatically generated |
| 1. Navigate to the area of the hierarchy that you would like to switch to. 2. Click Save.   **NOTE**: You will only see areas for which you have permission. | A screenshot of a cell phone  Description automatically generated |
| Switch to a Different Manager Account | |
| 1. If you have both a System Manager and an Institution Manager account, to switch from one to the other, click on the drop-down menu at the top right corner next to your name. 2. Select Change Profile. | A screenshot of a cell phone  Description automatically generated |
| 1. Select the Profile that you would like to access. | A close up of a logo  Description automatically generated |