



Association for  
Talent Development

# Job Aid: Enterprise Admin Portal

The [ATD Enterprise Membership Portal](#) is a tool to review and make changes to your ATD Enterprise membership. It is only accessible by the company's primary contact and its additional delegated employees. Log in to your td.org account or click on the link above to access the portal.

Please contact your ATD account representative or email [EnterpriseMembership@td.org](mailto:EnterpriseMembership@td.org) if you need assistance accessing the ATD Enterprise Membership Portal.

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## Company Information

### Company Information: Overview

This section will be available on each tab of the portal and displays your company information, current active members, the current membership term, and the account executive’s information. You can edit your company information, download your membership invoice, download your last receipt, or process a credit card payment for membership orders from this section.

The screenshot shows the 'Company Information: Overview' page. At the top, the company name 'Company ATD Enterprise Portal Demo' is displayed with a callout '1'. Below it, the membership term 'May 05, 2020 - May 31, 2021' is shown with callout '2'. On the right side, there are three callouts: '11' for 'Membership Invoice', '10' for 'Print Last Receipt', and '9' for 'Pay \$2,223.75'. The middle section contains company details: '3' for 'Company ID: 11763307' and 'Address: Alexandria, VA'; '5' for 'Website: td.org'; '7' for 'Company Size: 101-200' and 'Industry: Information (other services)'; and '8' for an edit icon. The bottom section shows '4' for 'Enterprise Membership' with 'Active Members 6' and '6' for 'Your ATD Team' with a profile for 'Starr Smith, Senior Account Executive'.

1. Company Name
2. Current Membership Term
3. Group ID and Address
4. Current Active Members
5. Company Website
6. ATD Account Executive (hover for contact information)
7. Company Size and Industry
8. Edit Company Information
9. Pay Open Balance (all open orders)
10. Print Last Receipt (download last receipt)
11. Membership Invoice (download invoice for all open membership orders)

## Company Information: Action Items


### Edit Company Information

1. Select the **pencil icon**.

**Company ATD Enterprise Portal Demo**  
 May 05, 2020 - May 31, 2021

Membership Invoice | Print Last Receipt | Pay \$2,223.75

---

Company ID: 11763307 | Website: td.org | Company Size: 101-200 | Industry: Information (other services) 

Address: Alexandria, VA

---

Enterprise Membership | Your ATD Team

Active Members 6 | Starr Smith, Senior Account Executive

2. Edit your company’s website, address, company size, or industry and select **Submit** to save.

**Company Contact Information**

Website  
 td.org

---

**Company Address**

Address 1: 1640 King St Ste 300  
 Address 2: Address 2

Country: United States | State: Virginia

City: Alexandria | Postal Code: 22314-2743

---

**About Your Team**

Company Size: 101-200 Employees | Industry: Information (other services)

**Submit** | Cancel

## Pay Open Balances

This will allow you to view and process credit card payments for all open orders associated with your group account. You can deselect orders during the next step if you wish only to pay for select orders at this time.

1. Select the **Pay** button.

### Company ATD Enterprise Portal Demo

May 05, 2020 - May 31, 2021

Membership Invoice

Print Last Receipt

Pay \$2,223.75

Company ID: 11763307  
Address: Alexandria, VA

Website: td.org

Company Size: 101-200  
Industry: Information (other services)

Enterprise Membership

Active Members 6

Your ATD Team

 Starr Smith  
Senior Account Executive

2. All unpaid orders will appear. From this page, you can process credit card payment for all open orders or deselect orders by selecting the check box to the left of the order (1) to only pay for remaining, selected orders. Once you have made your selections, (2) enter your credit card information, and (3) select the **Pay** button.

### ATD Enterprise Portal Demo, let's finalize your order.

BELOW ARE THE ITEMS INCLUDED IN YOUR ORDER:

Order Number: 9005833998  
Customer: Adams, Jeff

**ATD Enterprise Membership - Basic**  
June 1, 2021 - May 31, 2022  
Includes TD Magazine, access to all member libraries, member-only content, newsletters, and much more!  
Reference Order Number: 9005833998  
Reference Customer: Adams, Jeff  
Amount: \$239.00

---

Order Number: 9005833999  
Customer: Anderson, Kim

**ATD Enterprise Membership - Basic**  
June 1, 2021 - May 31, 2022  
Includes TD Magazine, access to all member libraries, member-only content, newsletters, and much more!  
Reference Order Number: 9005833999  
Reference Customer: Anderson, Kim  
Amount: \$239.00

---

Order Number: 9005834000  
Customer: Clarke, Nancy

**ATD Enterprise Membership - Bronze**  
June 1, 2021 - May 31, 2022  
Includes TD Magazine, access to all member libraries, member-only content, newsletters, and much more!  
Reference Order Number: 9005834000  
Reference Customer: Clarke, Nancy  
Amount: \$369.00

**2 PAYMENT DETAILS**

Card number

We accept Visa, MasterCard, Discover, and American Express.

Expiry date

CVV

Name on card

**3** PAY \$5,593.75

terms

By advancing, you accept and agree to ATD's [Terms of Use](#) and indicated you have reviewed the [Privacy Policy](#).

**Download Last Receipt**

This will generate your last payment receipt. Please contact your account representative if you need a receipt from a prior payment.

1. Select the **Print Last Receipt** button.

**Company ATD Enterprise Portal Demo**

May 05, 2020 - May 31, 2021

Membership Invoice
Print Last Receipt
Pay \$2,223.75

Company ID: 11763307 Website: td.org Company Size: 101-200  
 Address: Alexandria, VA Industry: Information (other services)

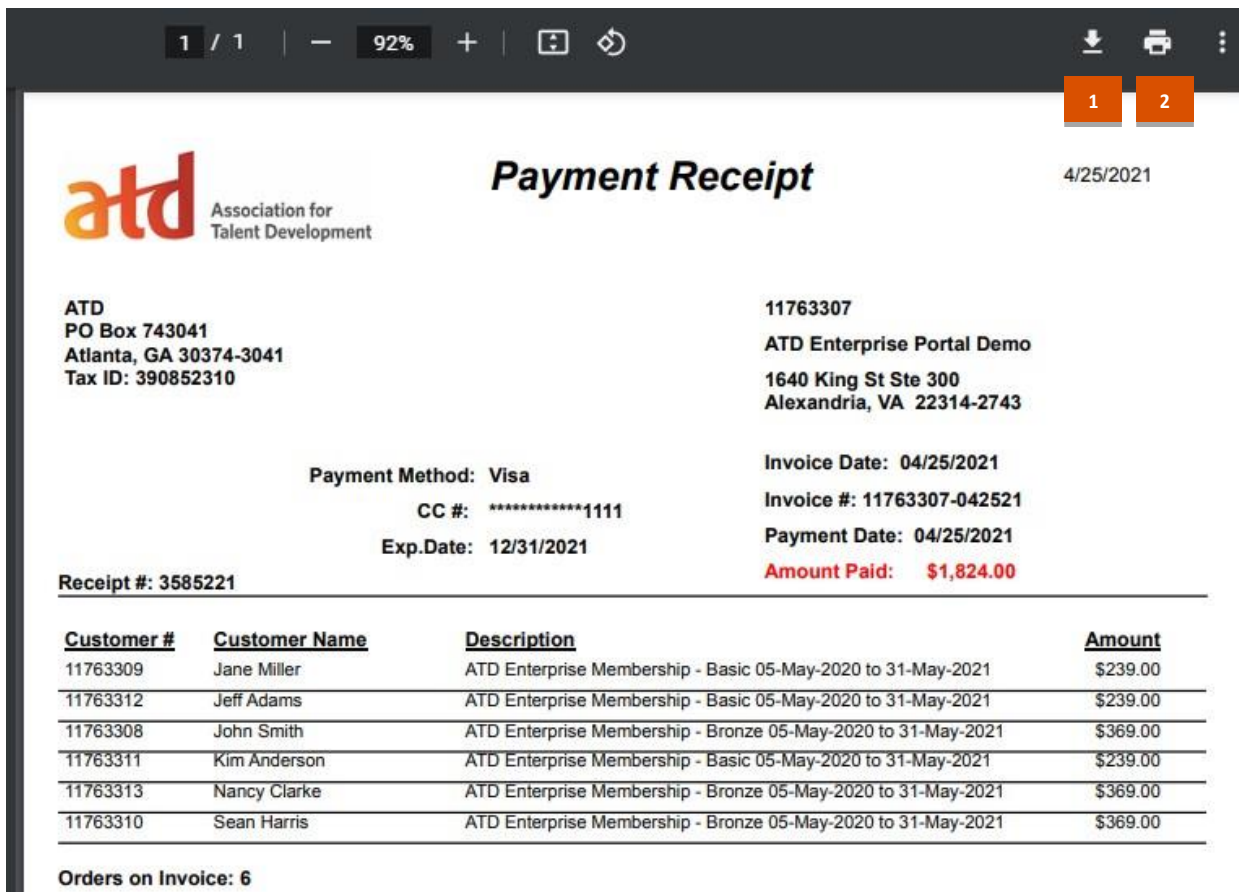
Enterprise Membership

Your ATD Team

Active Members 6


 Starr Smith  
 Senior Account Executive

2. Your last payment receipt will open in a new tab where you can (1) download or (2) print.



1 / 1 | 92% | [Icons]

1 2

**atd** Association for Talent Development

## Payment Receipt

4/25/2021

ATD PO Box 743041 Atlanta, GA 30374-3041 Tax ID: 390852310	11763307 ATD Enterprise Portal Demo 1640 King St Ste 300 Alexandria, VA 22314-2743
Payment Method: <b>Visa</b> CC #: *****1111 Exp.Date: 12/31/2021	Invoice Date: 04/25/2021 Invoice #: 11763307-042521 Payment Date: 04/25/2021 <b>Amount Paid: \$1,824.00</b>

Receipt #: 3585221

Customer #	Customer Name	Description	Amount
11763309	Jane Miller	ATD Enterprise Membership - Basic 05-May-2020 to 31-May-2021	\$239.00
11763312	Jeff Adams	ATD Enterprise Membership - Basic 05-May-2020 to 31-May-2021	\$239.00
11763308	John Smith	ATD Enterprise Membership - Bronze 05-May-2020 to 31-May-2021	\$369.00
11763311	Kim Anderson	ATD Enterprise Membership - Basic 05-May-2020 to 31-May-2021	\$239.00
11763313	Nancy Clarke	ATD Enterprise Membership - Bronze 05-May-2020 to 31-May-2021	\$369.00
11763310	Sean Harris	ATD Enterprise Membership - Bronze 05-May-2020 to 31-May-2021	\$369.00

Orders on Invoice: 6

Download Membership Invoice

This will generate an invoice for all unpaid membership orders.

1. Select the **Membership Invoice** button.

Company ATD Enterprise Portal Demo

May 05, 2020 - May 31, 2021

Membership Invoice
Print Last Receipt
Pay \$2,223.75

Company ID: 11763307 Website: td.org Company Size: 101-200  
 Address: Alexandria, VA Industry: Information (other services)

Enterprise Membership Your ATD Team  
 Active Members 6 Starr Smith  
 Senior Account Executive

2. Your invoice for unpaid membership orders will open in a new tab where you can (1) download, (2) print, (3) process a credit card payment, or (4) view other payment options.

1 | 61% | 1 | 2

**atd** Association for Talent Development  
 1640 King Street, Alexandria, VA 22314 USA  
 Phone: 703.683.8100 Fax: 703.299.8723  
 Tax ID: 39-0852310

**Invoice**

11763307  
 ATD Enterprise Portal Demo  
 Attn:  
 1640 King St Ste 300  
 Alexandria, VA 22314-2743

Invoice#: 11763307-042521  
 Invoice Date: 4/25/2021  
 Membership period: 06/01/2021 to 05/31/2022  
 Payment Terms: Due Upon Receipt

Order No	Name	Description	Amount
9005833998	Jeff Adams	ATD Enterprise Membership - Basic	\$239.00
9005833999	Kim Anderson	ATD Enterprise Membership - Basic	\$239.00
9005834000	Nancy Clarke	ATD Enterprise Membership - Bronze	\$369.00
9005834004	Tracy Davis	ATD Enterprise Membership - Bronze	\$30.75
9005834005	Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00
9005834001	Sean Harris	ATD Enterprise Membership - Bronze	\$369.00
9005834002	Jane Miller	ATD Enterprise Membership - Basic	\$239.00
9005834003	John Smith	ATD Enterprise Membership - Bronze	\$369.00
<b>Orders on Invoice: 8</b>			<b>Total Amount: \$2,223.75</b>

**IMPORTANT: PLEASE NOTE NEW PAYMENT INSTRUCTIONS BELOW**  
EFFECTIVE JULY 13, 2020.

**4 PAYMENT OPTIONS**

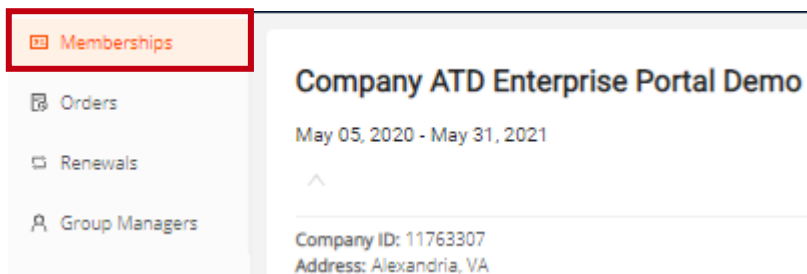
Credit Card	ACH Remittance	Wire Transfer	Payment by Check	Other
<p><b>3 PAY NOW</b></p>	Association for Talent Development HSBC Bank USA 452 Fifth Avenue New York, NY 10018 Bank Routing ACH: 022000020 Bank Account Number: 189022167	Association for Talent Development HSBC Bank USA 452 Fifth Avenue New York, NY 10018 Bank Routing Wire: 021001088 Bank Account Number: 189022167 Swift Code INTL: MRMDUS33	Check payable to: Association for Talent Development Mail to: Association for Talent Development PO Box 200212 Pittsburgh, PA 15251-0212 Please include the invoice/ order number in the memo section	Purchase Order: Please contact Customer Care for more information. Email: customercare@td.org Phone: 1.800.628.2783 (U.S) or 1.703.683.8100 (International) Available from 8am to 6pm EST (Mon-Fri) Fax: 1.703.299.8723

Page 1 of 1

## Memberships

### Memberships: Overview

Access the Memberships section by selecting the **Memberships** tab at the top left of the portal.



This section will display all active members. You can use this section to edit a current member's information, add a new member, remove a member, or swap a member in the current term. Changes made here will be made to your **current** membership term. If your renewal orders have already been created, changes made here will also be made to the upcoming renewals. Please refer to the [Renewals section](#) below if you would like to make changes to your upcoming renewal rather than your current membership term.

This section will also allow you to view and export your list of current members to Excel, search for a current member, download your current roster, resend welcome emails, send individual payment links for a member to self-pay, download invoices, and process a payment for new members added to your current term.



Memberships (changes made here will be reflected in your current membership term, which is noted above) 2 [+ Add Member](#)

1   [Advanced Search](#)

4 [Actions](#) ▾

<input type="checkbox"/>	Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
<input type="checkbox"/>	11882671	John Smith	John.Smithtest@td.org	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882672	Jane Miller	Jane.Millertest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Basic	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882673	Sean Harris	Sean.Harristest@td.org	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882674	Kim Anderson	Kim.Andersontest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Basic	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882675	Jeff Adams	Jeff.Adamstest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Basic	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882676	Nancy Clarke	Nancy.Clarketest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11882677	Tracy Davis	Tracy.Davistest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	<input type="button" value="..."/>

3 5

1. Search for a current member.
2. Add a new member to the current membership term. Payment must be processed before they will become an active member.
3. Select one or more members to perform the actions listed below:
  4. Actions (Dropdown button):
    - a. Export selected members to Excel.
    - b. Export the roster report.
    - c. Resend the welcome email. (This will only be sent to selected, active members.)
    - d. Send a payment link to selected members to self-pay.
    - e. Download invoice for selected members.
  5. Actions Ellipsis (. . .) [Edit/Remove/Swap]:
    - a. Edit a member’s contact information (Contact your account executive to edit name or email address).
    - b. Remove. (Only use if this member is **not** being replaced by a new member in current term.)
    - c. Swap. (This replaces an existing member within the current term.)

## Memberships: Action Items

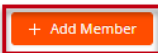
### Add a Member to the Current Term

This action is used to add a new member to your **current** membership term.

**Note:** A payment must be processed for a new member before they will become an active member. If your Enterprise membership is expiring within the next three months and you see the **Renewals** tab in the portal, a renewal order will also be created for this new member.

1. Select the **Add Member** button.

Memberships (changes made here will be reflected in your current membership term, which is noted above)



ID, name, email, or member type



<input type="checkbox"/>	Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
<input type="checkbox"/>	11882671	John Smith	John.Smithtest@td.org		ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	
<input type="checkbox"/>	11882672	Jane Miller	Jane.Millertest@td.org		ATD Enterprise Membership - Basic	1/20/2022	1/31/2023	\$0.00	
<input type="checkbox"/>	11882673	Sean Harris	Sean.Harristest@td.org		ATD Enterprise Membership - Bronze	1/20/2022	1/31/2023	\$0.00	
<input type="checkbox"/>	11882674	Kim Anderson	Kim.Andersonstest@td.org		ATD Enterprise Membership - Basic	1/20/2022	1/31/2023	\$0.00	

2. (1) Enter the employee profile required fields (first name, last name, email, country, address 1, city, state, and postal code). Select (2) Member Type and Role (if applicable) to designate them as a (3) payor or as an (4) additional group manager.
  - (3) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership. (4) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
3. (5) Select **Submit** to continue.

**1 Employee profile**

First Name:

Last Name:

Job Title:

Email Address:

Phone Number:

Job Function:

Country:

Address 1:

Address 2:

City:

State:

Postal Code:

**Employee Membership**

**2** Member Type:

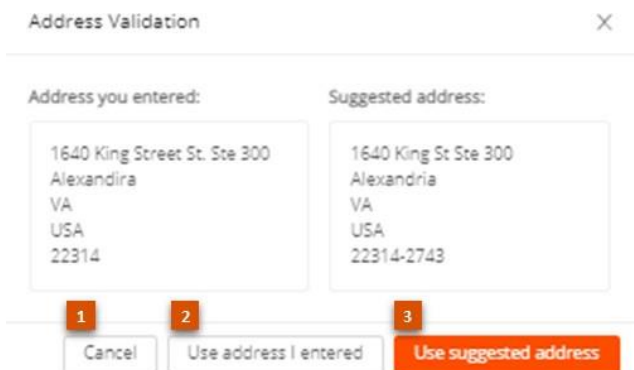
Roles

**3**  User can only pay open balances

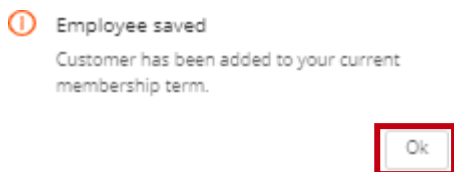
**4**  User can manage company members and pay open balances

**5**

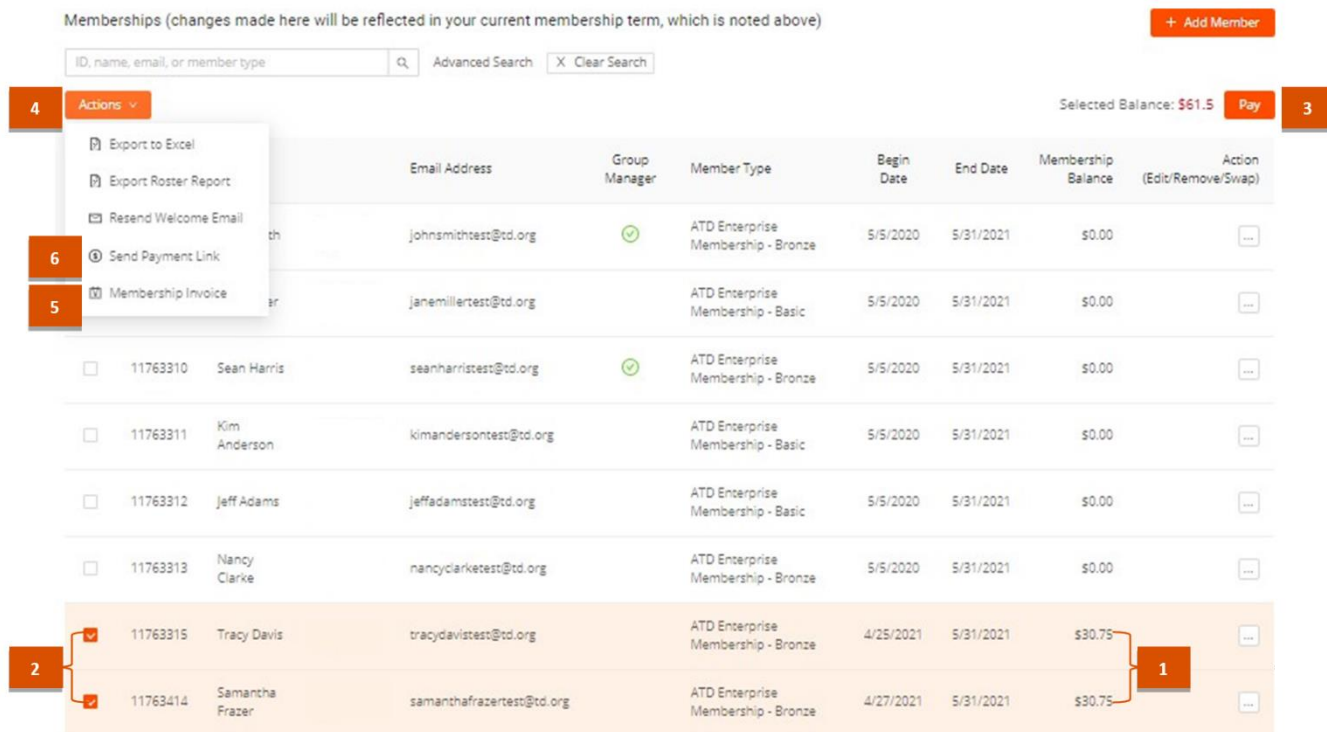
4. An Address Validation pop-up will appear. You may (1) cancel to edit the address entered on the previous screen, (2) proceed with the address you entered, or (3) use the suggested address.



5. A pop-up will appear confirming that the member has been added. Select **Ok** to proceed.
  - a. **Note:** The new member(s) will not be active until payment is processed (see next steps).



6. (1) You will now be able to see the added member(s) on the **Memberships** tab as well as the balance due to activate the new member(s).
7. Payment Options
  - a. **Credit Card Payment:** (2) Select the new member(s) and (3) select the **Pay** button.
  - b. **Generate an Invoice:** (2) Select the new member(s), (4) select the **Actions** drop-down button, and (5) select the **Membership Invoice** option.
  - c. **Member Self-Pay:** (2) Select the new member(s), (4) select the **Actions** drop-down button, and (6) select the **Send Payment Link** option.



## Swap a Member Within the Current Term

This action should be used to replace an active member within the current term. The new member will have the same membership type as the member they are replacing.

If your Enterprise membership is expiring in the next three months and you see the **Renewals** tab in the portal, the renewal order for the removed member will be canceled and a renewal order for the new member will be created.

- (1) Click on the ellipsis (. . .) to the right of the **current** member you would like to replace and (2) select **Swap**.

Memberships (changes made here will be reflected in your current membership term, which is noted above) + Add Member

ID, name, email, or member type

Actions

Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)	
<input type="checkbox"/>	11763308	John Smith	johnsmithtest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	<input type="button" value="..."/>
<input checked="" type="checkbox"/>	11763309	Jane Miller	janemillertest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	<input type="button" value="1 ..."/> <ul style="list-style-type: none"> <li><input type="button" value="Edit Member"/></li> <li><input type="button" value="Remove"/></li> <li><input checked="" type="button" value="2 Swap"/></li> </ul>
<input type="checkbox"/>	11763310	Sean Harris	seanharristest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	<input type="button" value="..."/>
<input type="checkbox"/>	11763311	Kim Anderson	kimandersonstest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	<input type="button" value="..."/>

- (1) Enter the member information required fields (first name, last name, email, country, address 1, city, state, and postal code). (2) Select Role, if applicable, to designate them as a payor or (3) as an additional group manager.
    - (2) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership. (3) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
- (4) Select **Submit** to continue.

**1** Member Information

First Name:

Country:

Last Name:

Address 1:

Job Title:

Address 2:

Email Address:

City:

Phone Number:

State:

Job Function:

Postal Code:

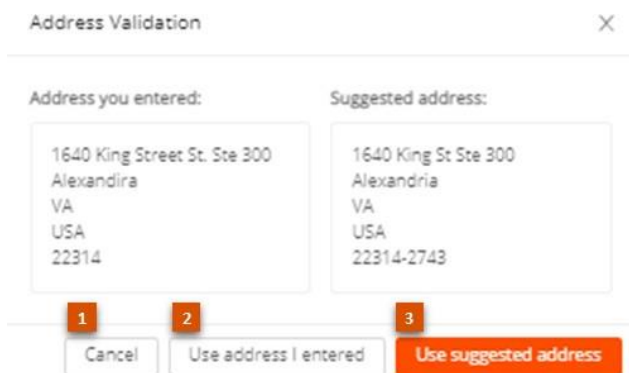
Roles

**2**  User can only pay open balances

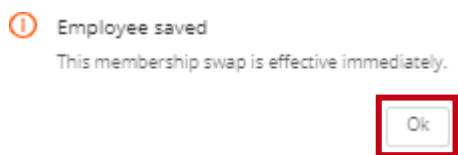
**3**  User can manage company members and pay open balances

**4**

4. An Address Validation pop-up will appear. You may (1) cancel to edit the address entered on the previous screen, (2) proceed with the address you entered, or (3) use the suggested address.



5. A pop-up will appear confirming the swap has been completed. Select **Ok** to proceed.



6. You will be taken back to the **Membership** tab where you will see the new member (and will no longer see the original member). The same changes will be reflected on the **Renewals** tab, if applicable.
7. After a swap, (1) the balance due for the member replacement should reflect \$0.00, indicating your new member is now active.
  - a. Please contact your account representative if the balance due after a swap is not \$0.00.

<input type="checkbox"/>	Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
<input type="checkbox"/>	11763308	John Smith	johnsmithtest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763309	Jane Miller	janemillertest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763310	Sean Harris	seanharristest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763311	Kim Anderson	kimandersontest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763312	Jeff Adams	jeffadamstest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763315	Tracy Davis	tracydavistest@td.org		ATD Enterprise Membership - Bronze	4/25/2021	5/31/2021	\$30.75	
<input type="checkbox"/>	11763414	Samantha Frazer	samanthafrazertest@td.org		ATD Enterprise Membership - Bronze	4/27/2021	5/31/2021	\$30.75	
<input type="checkbox"/>	11763420	Zack Harvey	zackharveytest@td.org		ATD Enterprise Membership - Bronze	4/27/2021	5/31/2021	\$0.00	<b>1</b>

## Remove a Member from the Current Term

This action only should be performed to fully remove (and not replace or swap) a member. If you wish to replace or swap a member in your current membership term, please refer to the [Swap a Member Within the Current Term](#) section.

This action will end the selected membership. If there is more than one month remaining in the current term, you will immediately receive a credit on your group account. *Please contact your account executive to use credit(s) on your account.*

**Note:** If your Enterprise membership is expiring within the next three months and you see the **Renewals** tab in the portal, the renewal order will also be canceled for this removed member.

1. (1) Select the **ellipsis (. . .)** to the right of the current member for whom you would like to terminate membership and (2) select **Remove**.

Memberships (changes made here will be reflected in your current membership term, which is noted above) + Add Member

ID, name, email, or member type

Actions

Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
11763308	John Smith	johnsmithtest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
11763309	Jane Miller	janemillertest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #e67e22; color: white; padding: 2px;">1</span> <input type="button" value="Edit Member"/>   <span style="background-color: #e67e22; color: white; padding: 2px;">2</span> <input type="button" value="Remove"/>   <input type="button" value="Swap"/> </div>
11763310	Sean Harris	seanharristest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
11763311	Kim Anderson	kimandersonstest@td.org		ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	

2. A pop-up will appear asking you to confirm this action. Select (1) **No** to cancel or (2) **Yes** to continue with removing the member.

Are you sure you want to remove Nancy Clarke?

If you are replacing this member with a new member, please use the "swap" function instead. If you want to continue removing this member, taking this action will terminate their membership immediately and may create a credit on your account. Please contact your Account Executive to use any credits on your account.

1

2

3. After selecting (2) **Yes** to remove the member, you will be taken back to the **Memberships** tab where the removed member will no longer be listed. They will also be removed from your upcoming renewal, if applicable.

## Edit a Member

This action will allow you to edit a current member’s mailing address, phone number and group manager role. *Please contact your account executive to edit a member’s name or email address.*

- (1) Select the **ellipsis ( . . . )** to the right of the current member you would like to edit and (2) select **Edit Member**.

Memberships (changes made here will be reflected in your current membership term, which is noted above) + Add Member

ID, name, email, or member type

Actions

Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
11763308	John Smith	johnsmithtest@td.org	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	<input type="button" value="..."/>
11763309	Jane Miller	janemillertest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	<input checked="" type="button" value="1"/> <input type="button" value="..."/>
11763310	Sean Harris	seanharristest@td.org	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	<input type="button" value="2"/> <input type="button" value="Edit Member"/> <input type="button" value="Remove"/> <input type="button" value="Swap"/>
11763311	Kim Anderson	kimandersontest@td.org	<input type="checkbox"/>	ATD Enterprise Membership - Basic	5/5/2020	5/31/2021	\$0.00	<input type="button" value="..."/>

- (1) The member’s employee profile will appear where you can add or edit their contact information and assign group manager roles. *Please contact your account representative if you need to update a name or email address.*
- You can designate the current member as a (2) payor or as an (3) additional group manager by selecting the corresponding **toggle** button. You can also remove (2) the current payor or (3) group manager role by deselecting the corresponding **toggle** button.
  - (2) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership. (3) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
- Once changes are made, (4) select **Submit** to save.

**1** Employee profile

First Name:

Last Name:

Phone Number:

Country:

Address 1:

Address 2:

City:

State:

Postal Code:

Roles

**2**  User can only pay open balances

**3**  User can manage company members and pay open balances

**4**

### Search for a Current Member

From the **Membership search box**, you can search for current members by their member ID, name, email, or membership type. Members meeting the criteria entered in the search box will be displayed.

Actions ▾

<input type="checkbox"/>	Member ID	Name	Email Address	Group Manager	Member Type	Begin Date	End Date	Membership Balance	Action (Edit/Remove/Swap)
<input type="checkbox"/>	11763308	John Smith	johnsmithtest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763310	Sean Harris	seanharristest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763313	Nancy Clarke	nancyclarkestest@td.org		ATD Enterprise Membership - Bronze	5/5/2020	5/31/2021	\$0.00	
<input type="checkbox"/>	11763315	Tracy Davis	tracydavisstest@td.org		ATD Enterprise Membership - Bronze	4/25/2021	5/31/2021	\$30.75	

### Export Selected Members to Excel

(1) Select the members you would like to export then (2) select the **Actions** button and select (3) **Export to Excel**.

2

3

Actions ▾

Export to Excel

Export Roster Report  
 Resend Welcome Email  
 Send Payment Link  
 Membership Invoice

1

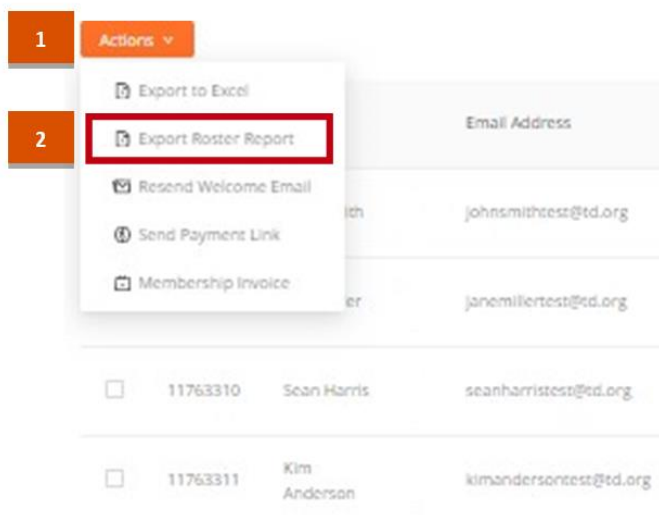
<input type="checkbox"/>	Member ID	Name	Email Address
<input checked="" type="checkbox"/>	11763310	Sean Harris	seanharristest@td.org
<input checked="" type="checkbox"/>	11763311	Kim Anderson	kimandersontest@td.org
<input type="checkbox"/>	11763312	Jeff Adams	jeffadamstest@td.org
<input type="checkbox"/>	11763313	Nancy Clarke	nancyclarkestest@td.org



## Export Roster Report

Your roster report will display all active members within your Enterprise membership.

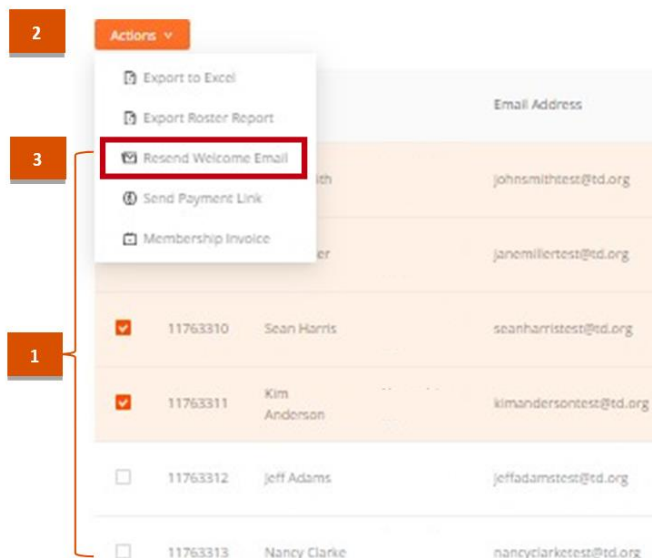
- (1) Select the **Actions** button then (2) select **Export Roster Report**.



## Resend Welcome Email

This action will allow you to resend the welcome email containing information on how to log in and access the membership account. The email will only be sent to the selected, active members.

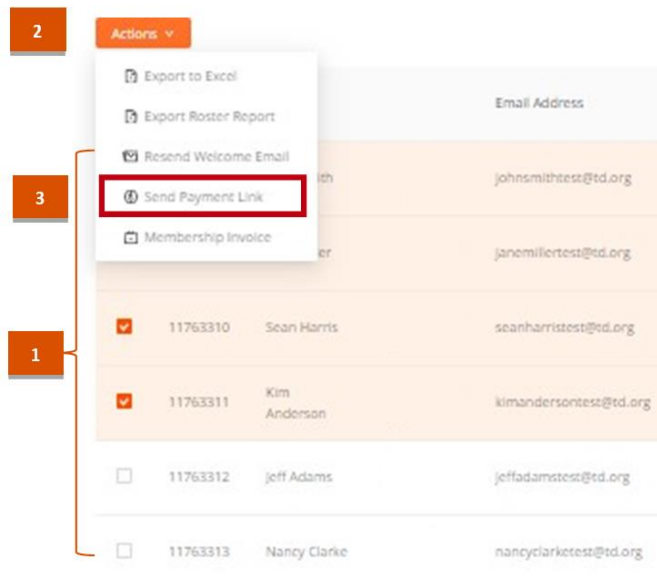
- (1) Select the members to whom you would like to resend welcome emails then (2) select the **Actions** button and (3) **Resend Welcome Email**.



## Send Payment Link to Member(s) to Self-Pay

This action can be used if you would like a member to pay for their membership order via their own credit card payment.

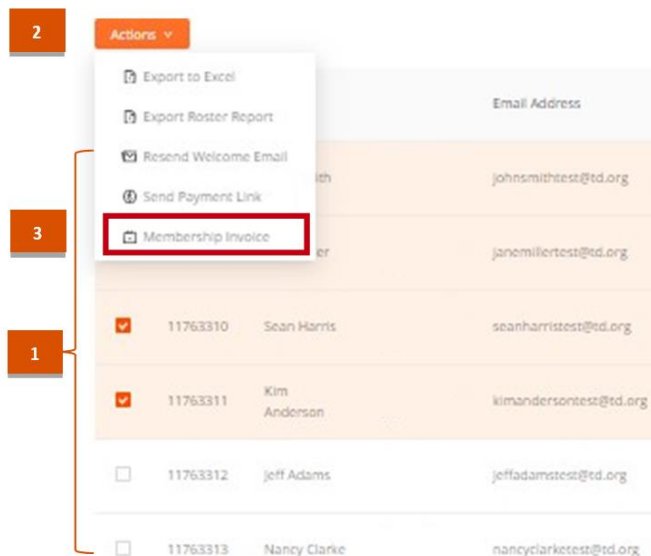
- (1) Select the member(s) to whom you would like to email a payment link then (2) select the **Actions** button and (3) **Send Payment Link**.



## Download Membership Invoice for Selected Members

This action enables you to generate an invoice for only the members you recently added to the current term, excluding upcoming renewal membership orders. The selected members will only appear on the invoice if there is a balance due.

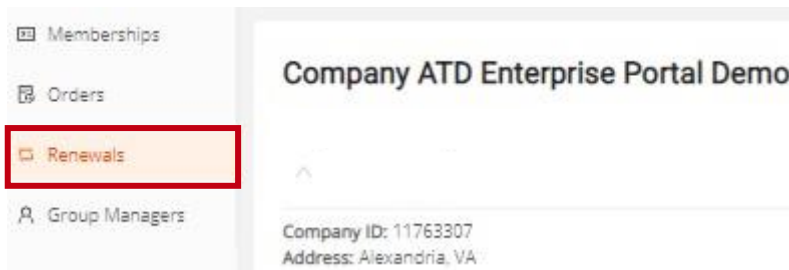
- (1) Select the members you would like to display on the invoice then (2) select the **Actions** button and (3) **Membership Invoice**.



## Renewals

### Renewals: Overview

Access the **Renewals** section by selecting the **Renewals** tab on the top left of the portal.



This section will display your upcoming renewal term, minimum requirements, members up for renewal, renewal membership types, and balances due for each renewal. The Renewals tab will appear approximately three months before your current membership term expires. You will not be able to access or view this section until you are within that timeframe.

This section can be used to change renewal membership types, add new members to your renewal, remove members from your renewal, generate full or split renewal invoices, and proceed to payment options.

**Note:** Changes made here will be made to your upcoming renewal term. Please see the [Membership section](#) if you would like to make changes to your current term.

If your Enterprise membership has recently expired, your renewal orders will move from the **Renewals** section to the **Membership** section.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

1

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

2

Select Members

Pay

Name	Membership Type	Balance	Select Member
Jeff Adams	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
Kim Anderson	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
Sean Harris	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Jane Miller	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
John Smith	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Samantha Frazer	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Zack Harvey	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>

5 Add Renewal Membership

6 Save & Continue

< 1 >

1. Your upcoming renewal term
2. Renewal minimum size requirements
3. Renewal membership type
4. Select or deselect members for renewal (deselect member(s) you would like to remove from the renewal or save for another method of payment)
5. Add a new member to the upcoming renewal term
6. Save & Continue to payment options

## Renewals: Action Items

### Change Renewal Membership Type



This section will allow you to change the membership type for a member’s upcoming renewal term.

1. (1) Select the **Membership Type** drop-down option next to the member you would like to change and (2) select the **new membership type**. Repeat for all members you would like to update.
  - a. *Please contact your account executive if you only see one type available and would like to change or if you have questions about the different membership types.*
2. Select (3) **Save & Continue** to save your changes. (Your changes will not be saved otherwise.)

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

 Select Members
 Pay

Name	Membership Type	Balance	Select Member	
Jeff Adams	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>	<div style="margin-bottom: 10px;"><b>Add Renewal Membership</b></div> <div><b>3 Save &amp; Continue</b></div>
Kim Anderson	ATD Enterprise Membership - Basic <span style="float: right; background-color: #c00; color: white; padding: 2px 5px; border-radius: 3px;">1</span>	\$239.00	<input checked="" type="checkbox"/>	
Sean Harris	ATD Enterprise Membership - Bronze <span style="float: right; background-color: #c00; color: white; padding: 2px 5px; border-radius: 3px;">2</span>	\$369.00	<input checked="" type="checkbox"/>	
Jane Miller	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>	
John Smith	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>	
Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>	
Samantha Frazer	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>	
Zack Harvey	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>	

- 3. You will be taken to the payment options screen where you can (1) review your saved renewal orders, (2) proceed to credit card payment, (3) generate an updated invoice, or (4) send individual payment links for each renewal member to process self-payment via credit card. If you need to make additional changes, select the **Renewals** tab.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

Select Members Pay

Name	Membership Type	Balance
Jane Miller	BASIC1	\$239.00
Jeff Adams	BASIC1	\$239.00
John Smith	BRONZE1	\$369.00
Kim Anderson	BRONZE1	\$369.00
Samantha Frazer	BRONZE1	\$369.00
Sean Harris	BRONZE1	\$369.00
Tracy Davis	BRONZE1	\$369.00
Zack Harvey	BRONZE1	\$369.00

Pay \$2692 2

Generate Invoice 3

Send Individual Payment Link(s) 4

## Add a New Member to the Renewal Term



This action is used to add a new member to your upcoming renewal membership term. If you would like to add the new member to your current term, please see the [Add a Member to Current Term](#) section.

1. Select the **Add Renewal Membership** button.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

 Select Members  Pay

Name	Membership Type	Balance	Select Member
Jeff Adams	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
Kim Anderson	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Sean Harris	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>

Add Renewal Membership

Save & Continue

2. (1) Enter the employee profile required fields (first name, last name, email, country, address 1, city, state, and postal code). (2) Select **Member Type** and Role (if applicable) to designate the new member as a (3) payor or as an (4) additional group manager.
  - (3) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership. (4) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
3. (5) Select **Submit** to continue.

**1** Employee profile

First Name:

Last Name:

Job Title:

Email Address:

Phone Number:

Job Function:

Country:

Address 1:

Address 2:

City:

State:

Postal Code:

Employee Membership

**2** Member Type:

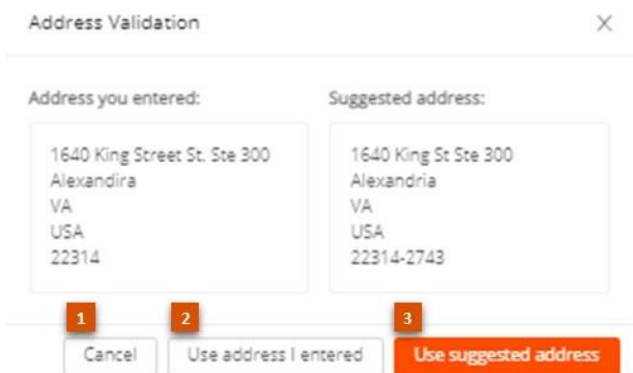
Roles

**3**  User can only pay open balances

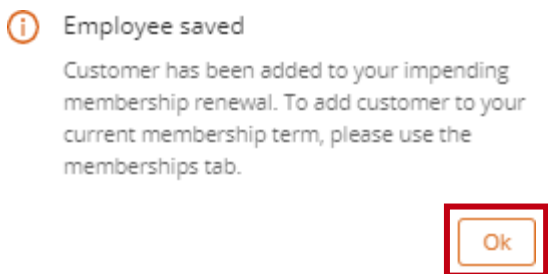
**4**  User can manage company members and pay open balances

**5**

- 4. An Address Validation pop-up will appear. You may (1) cancel to edit the address entered on the previous screen, (2) proceed with the address you entered, or (3) use the suggested address.



- 5. A pop-up will appear confirming the member has been added to your upcoming renewal. Select **Ok** to proceed.





- 6. The new member will be listed with your renewal members on the Renewal tab. From here you can (1) review your upcoming renewal orders, make additional changes as needed, or (2) select **Save & Continue** to proceed to payment options.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

Select Members Pay

Name	Membership Type	Balance	Select Member
Jeff Adams	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
Kim Anderson	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Sean Harris	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Jane Miller	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
John Smith	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Samantha Frazer	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Zack Harvey	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Maria Milam	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>

Add Renewal Membership

Save & Continue 2

1

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## Remove a Member from the Renewal Term

This action is used to remove a member or members from your upcoming renewal term. If you would like to remove the member(s) from your current term, please see the [Remove a Member From the Current Term](#) section.

**Note:** (1) Please ensure these removals will not drop your membership below the Enterprise membership minimum size requirements. *If so, please contact your account executive to discuss options.*

1. (2) Select the **toggle** button next to the member(s) you would like to remove from your upcoming renewal to deselect them.
  - a. The button will change from orange to gray once deselected, and the balance will update to \$0.00.
2. (3) Select **Save & Continue**.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)



Select Members Pay

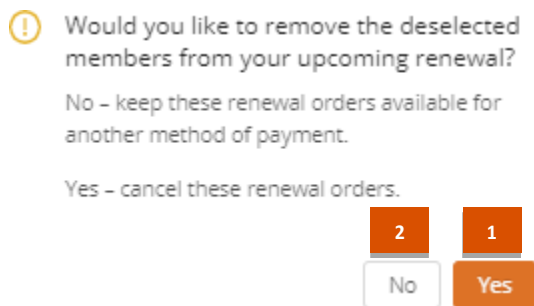
Name	Membership Type	Balance	Select Member
Jeff Adams	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
Kim Anderson	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Sean Harris	ATD Enterprise Membership - Bronze	\$0.00	<input type="checkbox"/>
Jane Miller	ATD Enterprise Membership - Basic	\$239.00	<input checked="" type="checkbox"/>
John Smith	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Samantha Frazer	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Zack Harvey	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Maria Milam	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Jacob Wright	ATD Enterprise Membership - Bronze	\$0.00	<input type="checkbox"/>

Add Renewal Membership

Save & Continue 3

2

3. A pop-up will appear asking you to confirm that action. (1) Select **Yes** to proceed with canceling the renewals orders deselected on the previous page.
  - a. (1) Selecting **Yes** will cancel and remove these renewals.
  - b. (2) Selecting **No** will allow the deselected members to remain on the renewal list. Please refer to the [Generate a Split Renewal Invoice](#) section for more information.



4. The renewal orders you deselected will be canceled, and you will be taken to the payment options screen where you can (1) review your remaining renewal orders, (2) proceed to credit card payment, (3) generate an updated invoice, or (4) send individual payment links for each renewal member to process self-payment via credit card. If you need to make additional changes, select the **Renewals** tab.

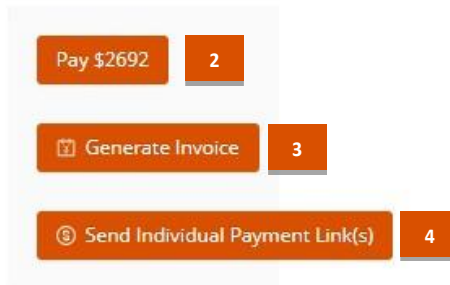
Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

Select Members Pay

Name	Membership Type	Balance
Jane Miller	BASIC1	\$239.00
Jeff Adams	BASIC1	\$239.00
John Smith	BRONZE1	\$369.00
Kim Anderson	BRONZE1	\$369.00
Maria Milam	BRONZE1	\$369.00
Samantha Frazer	BRONZE1	\$369.00
Tracy Davis	BRONZE1	\$369.00
Zack Harvey	BRONZE1	\$369.00



## Generate a Split Renewal Invoice



This action may be used if you need to split your renewal orders into multiple invoices for different methods of payment.

1. (1) Select the **toggle** button next to the member(s) you would like to exclude from your upcoming renewal invoice for a different method of payment.
  - a. The button will change from orange to gray once deselected, and the balance will update to \$0.00.
2. (2) Select **Save & Continue**.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

 Select Members
 Pay

Name	Membership Type	Balance	Select Member
Jeff Adams	ATD Enterprise Membership - Basic	\$0.00	<input type="checkbox"/>
Kim Anderson	ATD Enterprise Membership - Bronze	\$0.00	<input type="checkbox"/>
Jane Miller	ATD Enterprise Membership - Basic	\$0.00	<input type="checkbox"/>
John Smith	ATD Enterprise Membership - Bronze	\$0.00	<input type="checkbox"/>
Tracy Davis	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Samantha Frazer	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Zack Harvey	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>
Maria Milam	ATD Enterprise Membership - Bronze	\$369.00	<input checked="" type="checkbox"/>

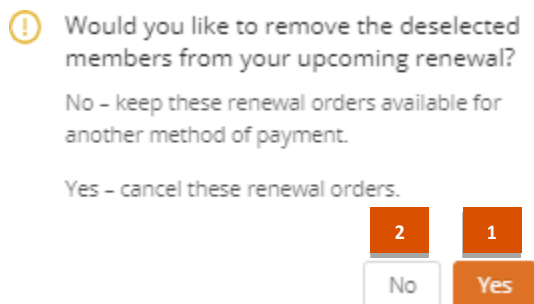
Add Renewal Membership

Save & Continue

2

1

3. When the pop-up appears, select **(2) No – keep these renewal orders available for another method of payment** to proceed to payment options for only the renewal orders remaining selected on the previous page.
  - a. **Note:** The renewal orders you deselected will not be canceled and will still be available on the Renewals page to process via a different payment method.



4. Next, you will be taken to the payment options screen where you can **(1) review the selected renewal orders**, **(2) proceed to credit card payment**, **(3) generate an invoice with only these renewal members**, or **(4) send individual payment links for each renewal member listed to process self-payment via credit card**.

Your Membership Renewal (changes made here will be reflected in your upcoming renewal term, which is noted below)

Jun 01, 2021 - May 31, 2022

Enterprise Renewal Minimum Requirements: Basic (5 Members); Bronze (5 Members); Silver (25 Members)

Select Members Pay

Name	Membership Type	Balance
Tracy Davis	BRONZE1	\$369.00
Samantha Frazer	BRONZE1	\$369.00
Zack Harvey	BRONZE1	\$369.00
Maria Milam	BRONZE1	\$369.00

Pay \$1476 **2**

Generate Invoice **3**

Send Individual Payment Link(s) **4**

< 1 >

5. Repeat the previous steps in this section as necessary to manage payment options for the remaining renewal orders you had deselected in the previous steps.

## Group Managers

### Group Managers: Overview

Access the Group Managers section by selecting the **Group Managers** tab on the top left of the portal.



This section will display current group managers or designated payors. A group manager can access the portal to process payment and make membership changes. A designated payor has view-only access to the portal to process payment but cannot make membership changes.

This section can be used to add, edit, remove, or view open orders for a current group manager or payor.

Group Managers 2 Add Group Manager

1 ID, name, email, or member type  X Clear Search

4 Actions ▾

<input type="checkbox"/>	Member ID	Name	Email Address	6 Group Manager	7 ATD Member	Member Type	8 Relationship Type	Balance	Action (Edit/Orders/Remove)
<input type="checkbox"/>	11882671	John Smith	John.Smithtest@td.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Secondary Contact	\$0.00	...
<input type="checkbox"/>	11882673	Sean Harris	Sean.Harristest@td.org		<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Payor	\$0.00	...

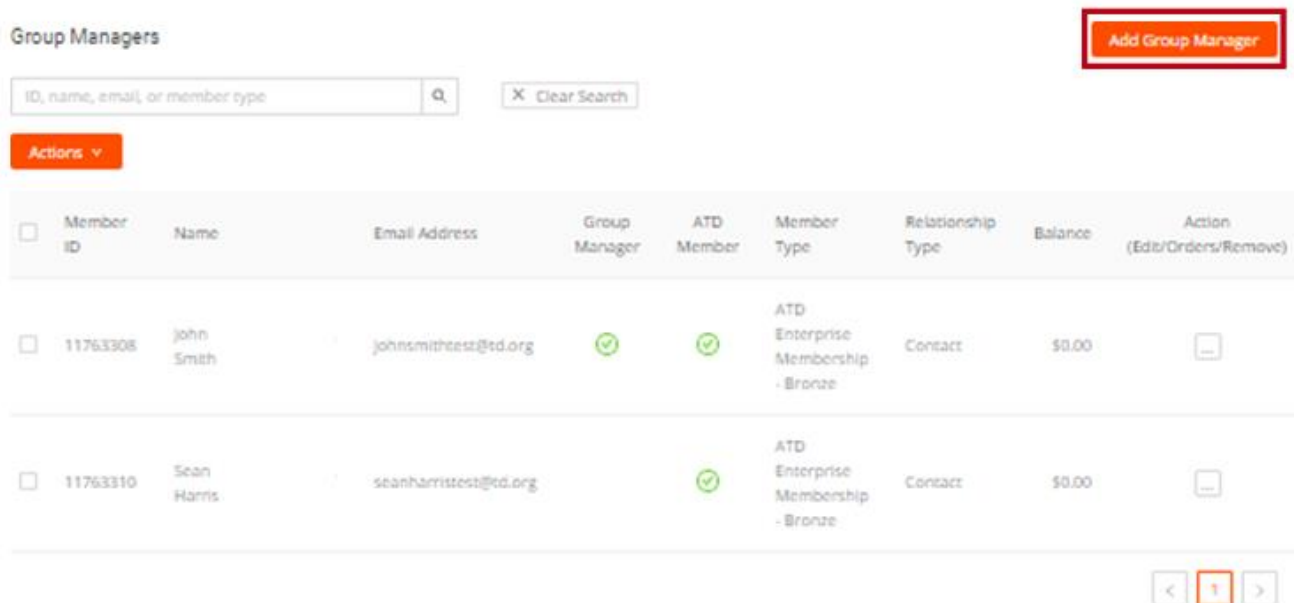
1. Search for a current group manager a payor.
2. Add a new group manager or payor.
3. Select one or more group managers or payors to perform the actions listed below.
4. Select **Actions** [Dropdown button]:
  - a. Export selected members to Excel
5. Actions ellipsis (. . .) [Edit/Orders/Remove]:
  - a. Edit role or contact information for group manager or payor (address, phone number or manager role).
    - i. *Please contact your account executive to edit name or email address.*
  - b. View open orders for selected manager or payor.
  - c. Remove.
    - i. **Note:** This action will also end membership if they are a current member. To remove the group manager or payor role but keep membership active, use the [Edit Group Manager](#) action.
6. Group Manager Column: This column is checked if they are a group manager and is blank if they are a designated payor.
7. ATD Member Column: This column is checked if they have an active membership.
8. Relationship Type Column: This column indicates whether they are a Group Manager (Primary or Secondary Contact) or a Payor.

## Group Managers: Action Items

### Add a New Group Manager or Payor

This action should be used to add a new group manager or payor who is not an existing member. If the new manager or payor is an existing member, please see the [Edit a Member](#) section under Memberships.

1. Select the **Add Group Manager** button.



2. (1) Enter the employee profile required fields (first name, last name, email, country, address 1, city, state, and postal code). (2) Select Member Type if applicable; leave Member Type blank if the new manager or payor should not be added to the Enterprise membership.
3. Select the role you wish to designate for the new manager: (3) payor or (4) group manager.
  - o (3) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership.
  - o (4) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
4. (5) Select **Submit** to continue.

**1** Employee profile

First Name:

Last Name:

Job Title:

Email Address:

Phone Number:

Job Function:

Country:

Address 1:

Address 2:

City:

State:

Postal Code:

Employee Membership

**2** Member Type:

Roles

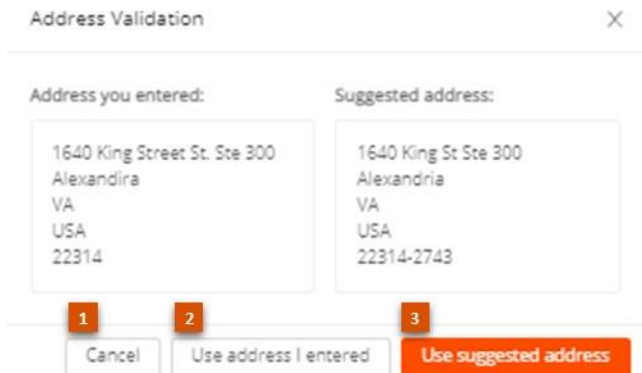
**3**  User can only pay open balances

**4**  User can manage company members and pay open balances

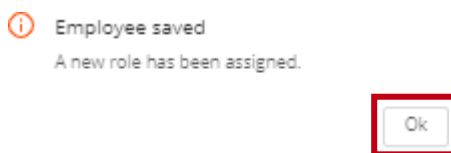
**5**



- An Address Validation pop-up will appear. You can (1) cancel to edit the address entered on the previous screen, (2) proceed with the address you entered, or (3) use the suggested address.



- A pop-up will appear confirming that the new role has been assigned. Select **Ok** to proceed.



- The new group manager or payor will be listed with your managers and payors on the **Group Managers** tab.

## Edit or Remove a Group Manager or Payor

This action should be used to edit or remove an existing group manager or payor role.

- Select the **ellipsis ( . . . )** to the right of the current manager whose role you would like to edit or remove and
  - select **Edit Group Manager**.

Group Managers Add Group Manager

ID, name, email, or member type

Actions

Member ID	Name	Email Address	Group Manager	ATD Member	Member Type	Relationship Type	Balance	Action (Edit/Orders/Rem)
<input type="checkbox"/> 11763308	John Smith	johnsmithtest@tdi.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Contact	\$0.00	<input type="button" value="..."/> <ol style="list-style-type: none"> <li>Edit Group Manager</li> <li>Open Orders</li> <li>Remove</li> </ol>
<input type="checkbox"/> 11763310	Sean Harris	seanharristest@tdi.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Contact		

- The manager’s employee profile will appear where you can add or edit their role and contact information.
    - Please contact your account representative if you need to update a name or email address.
  - You can remove the designation as a (2) payor or (3) group manager by deselecting the corresponding **toggle** button.
    - (2) Designated payors can access the portal to process payments but cannot make changes to the Enterprise membership. (3) Designated managers can access the portal to process payments and make changes to the Enterprise membership.
- (4) Select **Submit** to save.

**1** Employee profile

First Name:

Country:

Last Name:

Address 1:

Phone Number:

Address 2:

City:

State:

Postal Code:

Roles

**2**  User can only pay open balances

**3**  User can manage company members and pay open balances

**4**

### View Open Orders for Group Manager or Payor

This action can be used to view open orders for a group manager or payor.

1. (1) Select the **ellipsis (. . .)** to the right of the current manager for whom you would like to view open orders and then (2) select **Open Orders**.

Group Managers Add Group Manager

ID, name, email, or member type

Actions

Member ID	Name	Email Address	Group Manager	ATD Member	Member Type	Relationship Type	Balance	Action (Edit/Orders/Remi)
<input type="checkbox"/> 11763308	John Smith	johnsmithtest@td.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Contact	\$0.00	... <b>1</b>
<input type="checkbox"/> 11763310	Sean Harris	seanharristest@td.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATD Enterprise Membership - Bronze	Contact		... <b>2</b>

2. Open orders will be displayed for the selected manager. You can then select the **Pay** button to process a credit card payment.

Orders

ID, name, item description

Actions  Selected Balance: \$1675

Member ID	Name	Order Date	Order Number	Item Description	Amount	Paid	Balance	Action (Pay)
<input checked="" type="checkbox"/> 11763308	John Smith	4/27/2021	9005834024-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	... <b>1</b>

## Orders

### Orders: Overview

Access the Orders section by selecting the **Orders** tab on the top left side of the portal.



This section will display open balances for non-membership orders (courses, conferences, and so on) billed to the group account. You may choose one or more records to make payment or send individual payment links. Orders that are paid will no longer appear on this tab.

Orders

1

3

<input type="checkbox"/>	Member ID	Name	Order Date	Order Number	Item Description	Amount	Paid	Balance	Action (Pay)
<input type="checkbox"/>	11763308	John Smith	4/27/2021	9005834024-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	<input type="button" value="..."/>
<input type="checkbox"/>	11763309	Jane Miller	4/25/2021	9005834007-1	Instructional Design Certificate	\$1,695.00	\$0.00	\$1,695.00	<input type="button" value="..."/>
<input type="checkbox"/>	11763313	Nancy Clarke	4/25/2021	9005834006-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	<input type="button" value="..."/>
<input type="checkbox"/>	11763429	Clarence Brown	4/27/2021	9005834027-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	<input type="button" value="..."/>

< 1 >

1. Search for orders.
2. Select one or more open balance order lines to perform the actions listed below.
3. Actions:
  - a. Export orders to Excel.
  - b. Send payment link (this will email the selected customer(s) a link to process credit card payment).
4. Pay order balance by credit card.

Orders: Action Items

Send Payment Link to Individual(s) to Self-Pay

This action can be performed if you would like an individual to pay for their order via their own credit card payment.

1. (1) Select the individual(s) to whom you would like to email a payment link then (2) select the **Actions** button and (3) **Send Payment Link**.

Selected Balance: \$3370 Pay

Order ID	Name	Order Date	Order Number	Item Description	Amount	Paid	Balance	Action (Pay)
<input checked="" type="checkbox"/>	11763308 John Smith	4/27/2021	9005834024-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...
<input checked="" type="checkbox"/>	11763309 Jane Miller	4/25/2021	9005834007-1	Instructional Design Certificate	\$1,695.00	\$0.00	\$1,695.00	...
<input type="checkbox"/>	11763313 Nancy Clarke	4/25/2021	9005834006-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...
<input type="checkbox"/>	11763429 Clarence Brown	4/27/2021	9005834027-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...

## Process Credit Card Payment

This action can be used to process credit card payment for the listed order(s).

- (1) Select the order(s) you would like to pay and (2) select the **Pay** button at the top right.

Actions ▾										Selected Balance: <b>\$3370</b>	<b>Pay</b>
<input type="checkbox"/>	Member ID	Name	Order Date	Order Number	Item Description	Amount	Paid	Balance	Action (Pay)		
<input checked="" type="checkbox"/>	11763308	John Smith	4/27/2021	9005834024-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...		
<input checked="" type="checkbox"/>	11763309	Jane Miller	4/25/2021	9005834007-1	Instructional Design Certificate	\$1,695.00	\$0.00	\$1,695.00	...		
<input type="checkbox"/>	11763313	Nancy Clarke	4/25/2021	9005834006-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...		
<input type="checkbox"/>	11763429	Clarence Brown	4/27/2021	9005834027-1	ATD 2021 International Conference & Exposition	\$1,675.00	\$0.00	\$1,675.00	...		

- (1) The selected orders will appear. (2) Other unpaid orders for your group will appear here as well (if applicable), but only the orders you selected on the previous page will be selected for payment. You can continue to manage your payment on this page by selecting or de-selecting orders, as necessary. Only the selected orders on this page will be paid. (3) Enter your credit card information and (4) select the **Pay** button.

## ATD Enterprise Portal Demo, let's finalize your order.

BELOW ARE THE ITEMS INCLUDED IN YOUR ORDER:

**Order Number: 9005834007**  
Customer: Miller, Jane

**Instructional Design Certificate**  
ATD Online Program  
June 21, 2021-August 9, 2021  
Reference Order Number: 9005834007  
Reference Customer: Miller, Jane  
Amount: \$1,695.00

**Order Number: 9005834024**  
Customer: Smith, John

**ATD 2021 International Conference & Exposition**  
Salt Palace Convention Center  
August 29, 2021-September 1, 2021  
Reference Order Number: 9005834024  
Reference Customer: Smith, John  
Amount: \$1,675.00

**Order Number: 9005833998**  
Customer: Adams, Jeff

**ATD Enterprise Membership - Basic**  
June 1, 2021-May 31, 2022  
Includes TD Magazine, access to all member libraries, member-only content, newsletters, and much more!  
Reference Order Number: 9005833998  
Reference Customer: Adams, Jeff  
Amount: \$239.00

**PAYMENT DETAILS**

Card number  
 ✓  
We accept Visa, MasterCard, Discover, and American Express.

Expiry date

CVV

Name on card

PAY \$3,370.00

terms

By advancing, you accept and agree to ATD's [Terms of Use](#) and Indicated you have reviewed the [Privacy Policy](#).