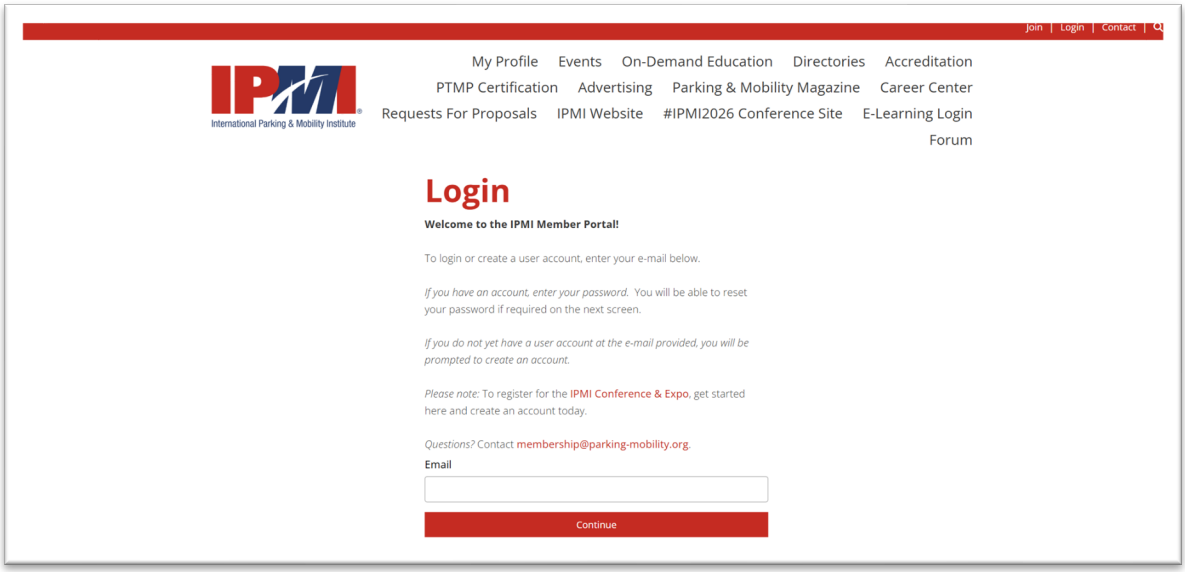
International Parking & Mobility Institute
Member

INSTRUCTIONS ON HOW TO UPDATE YOUR STAFF ROSTER

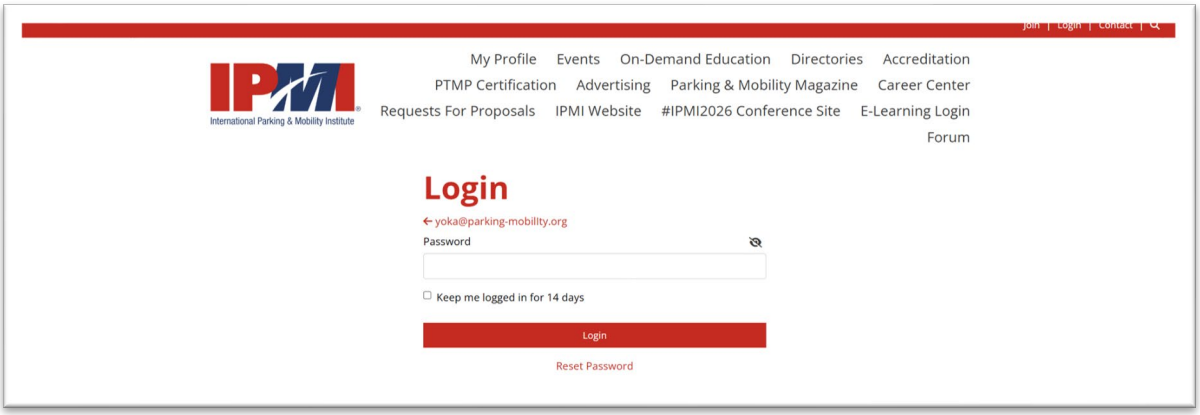
- Anyone on your team with Management Access (including your primary/voting and billing contacts) may make changes via the portal. Instructions to do so follow in this document.
- You may also request a staff roster in excel and email the update to membership@parking-mobility and IPMI will make the updates for you.
- To receive member benefits under your organization, including free frontline training, chats and roundtables, discounts on conference and registration fees, staff must be on the roster.

MAKING UPDATES IN THE PORTAL

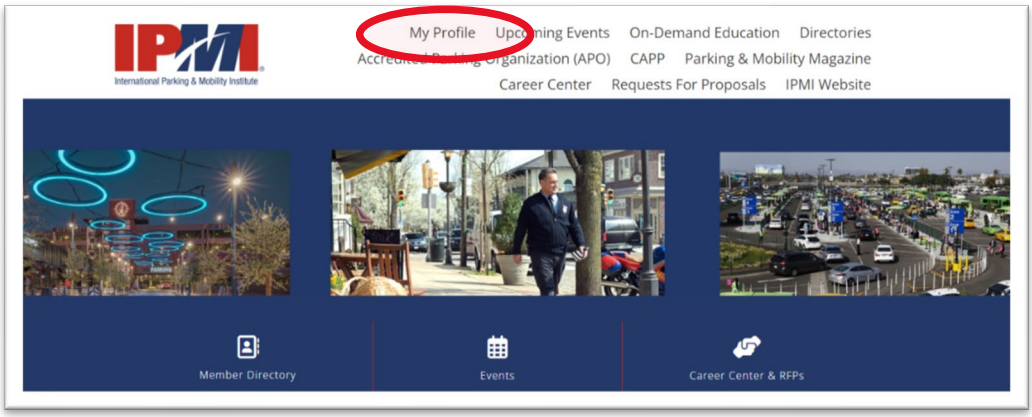
1. **Visit https://login.parking-mobility.org/login and enter your username.**



On the next page, enter your password. If you forget your password, click on the "Reset Password" link to receive an email from info@parking-mobility.org containing instructions for resetting your password.



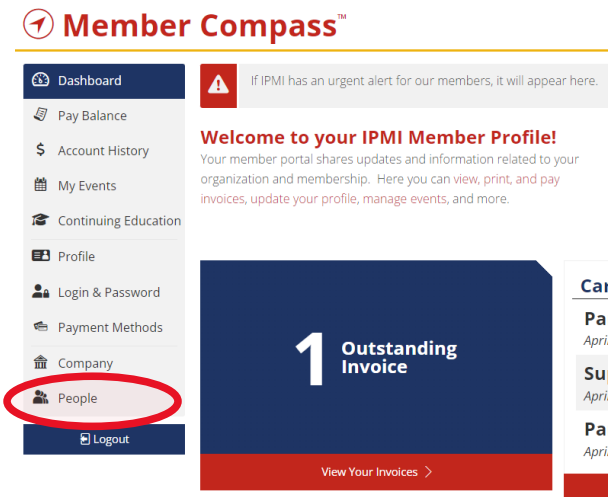
Once you are logged in, click "My Profile" at the top of the screen.



2. **Click on "People" on the vertical links on the left to add, delete, or edit the profiles.**

   If you do not have Management Access, you will not see the People tab and will not be able to edit the roster. Ask your primary or billing contact to give you access or ask an IPMI staff member to give them to you by emailing membership@parking-mobility.org.

   Open invoices will be listed in the blue box in the center of the screen. Click "View Your Invoices" to see and pay invoices.



   Note: Name changes can only be completed by IPMI staff. Please email us at membership@parking-mobility.org with name change requests.

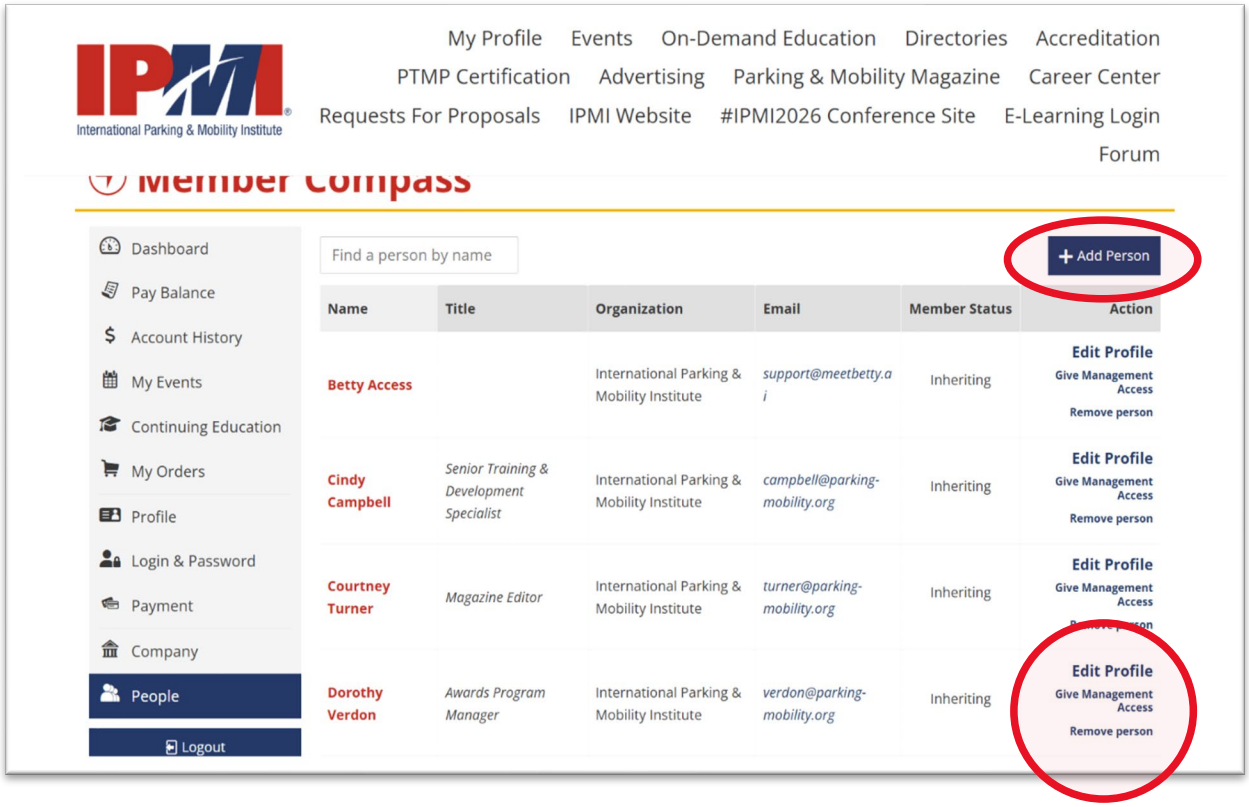
3. **Add and remove employees from your roster.**

   To add an employee, click on "**Add Person**" at the top of the next screen.

   The database lists required fields with an asterisk. Most are self-explanatory but please reach out to us via email with questions!

   For **Specific Role in Organization**, choose the most appropriate response from the drop-down options.

   It is recommended that those with management access complete basic information and extend the invitation to the individual to complete any optional personal information.

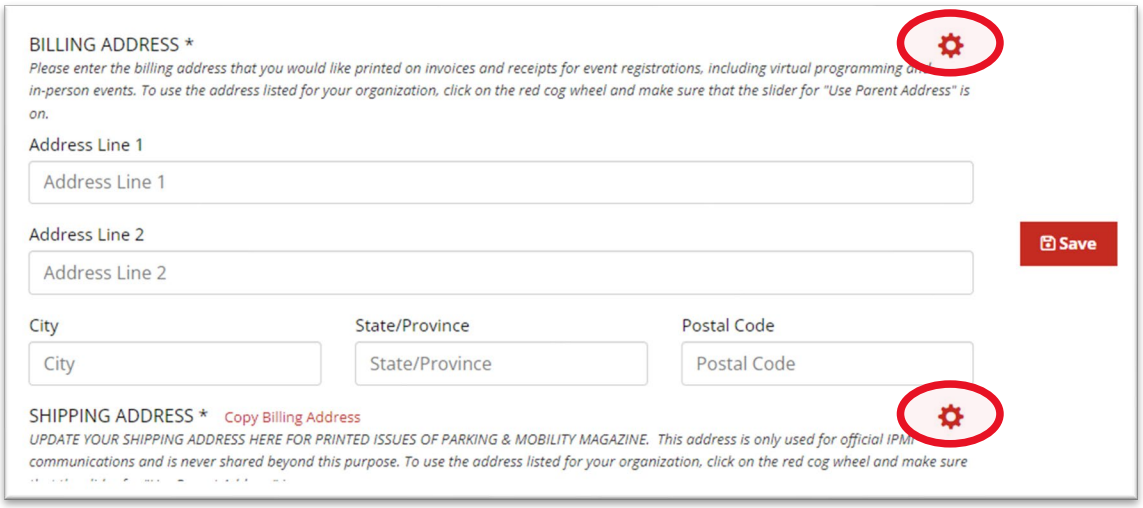


4. **Add the employee's information to the pop-up screen.**

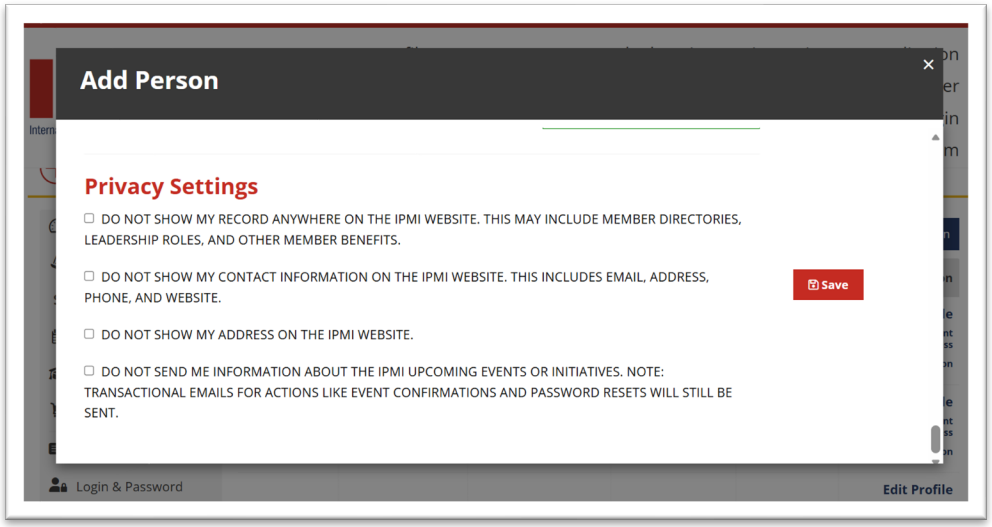
   For the **billing** address, double-click the red cog to insert the address for your organization. *There should be one billing address for all employees on your roster.*

   For the **shipping** address, double-click on the red cog to insert the addresses listed for your organization, if applicable. Line 2 should be used for specific suites or departments.

If the shipping address is different than the organization's, enter the address in lieu of using the red cog. *Individual addresses are hidden in the Member Directory.*



5. **Review the privacy settings for any new employees.**



6. **To edit an existing profile** (such as their shipping address, job title, or phone number), click on "Edit Profile."

   Click "Give Management Access" to give an employee the ability to edit the roster or pay invoices through the portal.
7. **Click "Remove Person" to remove someone.**
8. **Click save for the record.**