

How to add an Adviser to a Chapter

7 Steps [View most recent version](#) 

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STEP 1

Search for individual and go to their Account Manager

Make sure their membership status is Adviser/Volunteer. If it's not, use the drop-down to select Adviser/Volunteer and scroll to the bottom of the page and hit the update button.

The screenshot shows the 'Account Manager' interface for Janet Brophy. At the top, there are navigation tabs for Profile, Activities, Attachments, Invoices, Donations, and Engagement. Below these are tabs for Idalia High School, Account, Records, Awards, Family, and Events. The main content area is titled 'Member Information' and includes a profile picture placeholder with a 'Change Profile Picture' button. The information fields are as follows:

- National ID: #3600322 (Officers Only + Staff)
- Full Name: Janet (First Name), Middle, Brophy (Last Name), Suffix (Anyone)
- Preferred First Name: (replaces your first name) (Anyone)
- Maiden Name: (helps appear in search results) (Anyone)
- Membership Status: Adviser/Volunteer (highlighted with an orange box, Anyone)
- Login Status: Account not activated, Never sent activation email, send activation email (Officers)
- Data Use Terms and Conditions: Never logged in to agree (Staff)

STEP 2

At the bottom of the page, you will see the individual's affiliations.

Click on "+ Add Affiliation" to add a new chapter affiliation to the individual's account.

The screenshot shows the 'Affiliations' section of the Account Manager. At the top, there is a field for 'Join the Alumni & Professional Network:' (Officers Only + Staff). Below this is a section titled 'AFFILIATIONS' (highlighted with an orange box) for 'IDALIA HIGH SCHOOL' (remove affiliation). The details for this affiliation are:

- Account Type: Adviser: Primary Adviser (Anyone)
- High School Chapter ID: (Anyone)

At the bottom of the affiliations section, there is a red box around the '+ Add Affiliation' button. At the very bottom of the page, there are buttons for 'Update Profile' or 'Reset Changes'.

STEP 3

Type chapter name and select from drop-down menu

Affiliations

IDALIA HIGH SCHOOL 🗑️ remove affiliation

Account Type: Adviser: Primary Adviser 🔒 Anyone

High School Chapter ID: 🔒 Anyone

Affiliation to add: [Preview](#)

Account Type To Assign:

- Idalia High School
Idalia, CO
- Idalia School - M.S. Middle Level
Idalia, CO

Update Profile or Reset Changes

STEP 4

Choose "Adviser" from the Account Type drop-down and click on "Update Profile"

Affiliations

IDALIA HIGH SCHOOL 🗑️ remove affiliation

Account Type: Adviser: Primary Adviser 🔒 Anyone

High School Chapter ID: 🔒 Anyone

Affiliation to add: [Preview](#)

Account Type To Assign: ▼


Update Profile or Reset Changes

STEP 5

Click on the edit button next to Adviser.

IDALIA SCHOOL - M.S. MIDDLE LEVEL remove affiliation

Account Type: Middle School Chapter ID:

Adviser: 

Anyone
Anyone

[+ Add Affiliation](#)

Update Profile or Reset Changes

STEP 6

Check if adviser is primary or co-adviser. Update account type.

Account Manager

Janet Brophy Profile Activities Attachments Invoices Donations Engagement

Idalia School - M.S. Middle Level Account Records Awards Family Events

Janet Brophy Adviser

Member Account Type & Membership Status

Change a member's account type, set a Chair Position, or remove someone from this headquarters. If you remove someone and they have an account with another GreekTrack website, only this headquarters's data will be removed but their account will still be active on their other sites.

Account Type: Primary Adviser

Email Notification

Send Janet a notification of this change

Do not send a notification of this change (Janet requested this option)









Add a **reason for change** to the notification message:

Update Account Type

STEP 7

The individual is now affiliated to the chapter as a primary adviser.

Affiliations

IDALIA HIGH SCHOOL		 remove affiliation
Account Type:	Adviser: Primary Adviser 	 Anyone
High School Chapter ID:	<input type="text"/>	 Anyone
IDALIA SCHOOL - M.S. MIDDLE LEVEL		 remove affiliation
Account Type:	Adviser: Primary Adviser 	 Anyone
Middle School Chapter ID:	<input type="text"/>	 Anyone

[+ Add Affiliation](#)

