

# USER PORTAL GUIDE

## Start on Homepage: User Log in

- A. To change personal information or account information
- B. To join or renew your membership
- C. To view/browse committees
- D. Manage payments/view account
- E. Register for events/purchase exhibit opportunities
- F. Make a donation to the ADISA Foundation

The screenshot displays a user's profile and account information. The interface is organized into several sections, each highlighted with a red box and a letter:

- A. MY PROFILE:** Displays membership ID (54379), user name (Erin Balcerzak), address (10401 North Meridian Street, Suite 202, Indianapolis, IN 46290-1090 US), preferred contact number ((317) 663-4183), email (ebalcerzak@adisa.org), and login ID (ebalcerzak@adisa.org). It also includes links for "Edit My Information" and "Change My Password".
- B. MY MEMBERSHIP:** Shows expiration date (12/31/2030) and membership type (Affiliate Company). It includes a link to "Join/Renew Real Estate Investment Securities Association".
- C. MY COMMITTEES:** Indicates that no committees are currently visible and provides links to "View My Committees" and "Browse Committees".
- D. MY ACCOUNT:** Shows financial status: Outstanding Balance (\$0.00), Credit Balance (\$0.00), and Last Payment (No payments on file). It includes links for "Manage Saved Payment Options", "Manage Future Payments", and "View Account History".
- E. EVENTS:** Provides links to "Register for Events" and "View My Event Registrations".
- F. ADISA FOUNDATION DONATIONS:** Shows "Last Donation: No Records Found" and includes links for "Make a Donation" and "View My Giving History".

Other sections visible include "MY CEU CREDITS (COMING SOON)" with year-to-date and total credits at 0.0, and "AWARDS & COMPETITIONS" showing no records for the last competition entry and a total of 0 entries submitted.

# REGISTERING FOR AN ADISA EVENT

To register for an ADISA event:

**Select:** “Register for Events”

*PLEASE NOTE: All balances must be paid in full before registering for any ADISA events.  
This includes all exhibitor, sponsorship, and miscellaneous invoices.*

The screenshot displays a user dashboard with two main sections: 'MY PROFILE' and 'MY ACCOUNT'. The 'MY PROFILE' section includes the user's membership ID (54379), name (Erin Balcerzak), address (10401 North Meridian Street, Suite 202, Indianapolis, IN 46290-1090 US), preferred contact number ((317) 663-4183), email (ebalcerzak@adisa.org), and login ID (ebalcerzak@adisa.org). It also features links to 'Edit My Information' and 'Change My Password'. The 'MY ACCOUNT' section shows financial details: Outstanding Balance (\$0.00), Credit Balance (\$0.00), and Last Payment (No payments on file). It includes links to 'Manage Saved Payment Options', 'Manage Future Payments', and 'View Account History'. Below this is an 'EVENTS' section with a blue arrow pointing to 'Register for Events', and an 'ADISA FOUNDATION DONATIONS' section showing 'No Records Found' and links to 'Make a Donation' and 'View My Giving History'.

**Select the event you wish to attend/register**

**Select:** “Individual Registration for this Event”/”Group Registration for this Event”

The screenshot shows the registration page for the event '2015 DUE DILIGENCE'. Under the 'DESCRIPTION' heading, it states 'No description has been provided.' Below this, there is a list of options: 'Individual Registration for this Event' (highlighted with a blue arrow), 'Purchase Exhibit Opportunities for all 2015 events', 'Download iCalendar File', and 'Go Home'.

Select the registration fee that best describes your membership category.

*PLEASE NOTE: If you are not able to select a registration category below, your membership approval may still be pending or your account may be missing some required information. Please contact ADISA directly.*

- DD Sponsor (with Exhibit) - \$2,599.00 (ineligible)
- DD Sponsor (without Exhibit) - \$2,599.00 (ineligible)
- DD Affiliate (with Exhibit) - \$1,798.00 (ineligible)
- DD Affiliate (without Exhibit) - \$1,798.00 (ineligible)
- DD Associate BD/RIA Firm - \$0.00 (ineligible)
- DD Associate BD/RIA Additional - \$99.00 (ineligible)
- DD Sponsor Non Member (with Exhibit) - \$0.00 (ineligible)
- DD Sponsor Non Member (without Exhibit) - \$0.00 (ineligible)
- DD Affiliate Non Member (with Exhibit) - \$0.00 (ineligible)
- DD Affiliate Non Member (without Exhibit) - \$0.00 (ineligible)

Complete the following registration questionnaire:

Is this your first ADISA event? *	---- Select ----
What term best describes your occupation? *	---- Select ----
How did you find out about this event? *	---- Select ----
Are you exhibiting at the Due Diligence? *	---- Select ----
Special needs or dietary restrictions:	
Emergency Contact Name: *	
Emergency Contact Phone: *	

Proceed to payment screen to complete your registration.

# PURCHASING AN EXHIBIT

To purchase exhibit/sponsorship opportunities at an ADISA event:

**Select: “Register for Events”**

**MY PROFILE**

Your Membership ID:  
**54379**

Erin Balcerzak  
ADISA  
10401 North Meridian Street  
Suite 202  
Indianapolis, IN 46290-1090 US

**Preferred Contact #:** (317) 663-4183  
**Email:** ebalcerzak@adisa.org  
**Login ID:** ebalcerzak@adisa.org (change)

Edit My Information   Change My Password

You are linked to 1 other record(s). You can login as them to update or review their account information:

- ADISA (Organization)

**MY ACCOUNT**

**Outstanding Balance:** \$0.00  
**Credit Balance:** \$0.00  
**Last Payment:** No payments on file.

- Manage Saved Payment Options
- Manage Future Payments
- View Account History

**EVENTS**

- Register for Events
- View My Event Registrations

**ADISA FOUNDATION DONATIONS**

**Last Donation:** No Records Found

- Make a Donation
- View My Giving History

**Select the ANY event (you will select your event choice on Page 5).**

**Select: “Purchase Exhibit Opportunities for all 2015 events”**


## 2015 DUE DILIGENCE

### DESCRIPTION

No description has been provided.

- Individual Registration for this Event
- Purchase Exhibit Opportunities for all 2015 events
- Download iCalendar File
- Go Home

Select: "Register" on the event of your choice

EXHIBITOR OPPORTUNITIES AVAILABLE	
Name	
2015 Annual Conference	Register
2015 Due Diligence	Register 
2015 Spring Symposium	No Registration Window

Select the Booth Type your wish to purchase.

Additional Items can also be selected as well.

[CLICK HERE to Download Show Floor Layout](#)

### SELECT BOOTH TYPE:

- Silver DD - **SOLD OUT**
- Bronze DD - **\$7,295.00**
- Additional Opportunity DD - **\$0.00**

### ADDITIONAL ITEMS

If you would like to sponsor any of the additional opportunities, please select the item(s) below by placing a "1" in the designated box.

<input type="text" value="0"/>	2015 DD - WiFi	<b>Call for Pricing</b>
<input type="text" value="0"/>	2015 DD - Cocktail Reception	<b>\$3,980.00</b>
<input type="text" value="0"/>	2015 DD - Tote Bag	<b>SOLD OUT</b>
<input type="text" value="0"/>	2015 DD - Lanyards	<b>SOLD OUT</b>
<input type="text" value="0"/>	2015 DD - Lunch	<b>\$2,510.00</b>

Choose your top three Booth Preferences (ADISA will contact you to confirm booth availability).

Choice #1	Booth 5 ▼
Choice #2	Booth 12 ▼
Choice #3	Booth 23 ▼

*PLEASE NOTE: You must download and read the exhibitor contract before moving onto the next steps.*

Please download & read the exhibitor contract below:  
[Download ADISA Exhibitor Contract](#)

By selecting this box, I agree to the exhibitor contract above as determined by ADISA.

[Previous](#)      [Add To Cart](#)      [Cancel](#)

Proceed to payment screen to complete your exhibit purchase.

At this point you may also purchase exhibits for future events (if available).

### MY SHOPPING CART

Product	Quantity	Unit Price	Multiple Registration Discount	Total	
Bronze DD	1	\$7,295.00	\$364.75	\$6,930.25	<a href="#">Remove</a>
Bronze DD	1	\$7,295.00	\$0.00	\$7,295.00	<a href="#">Remove</a>
				\$14,225.25	<a href="#">Checkout</a>

### EXHIBITOR OPPORTUNITIES AVAILABLE

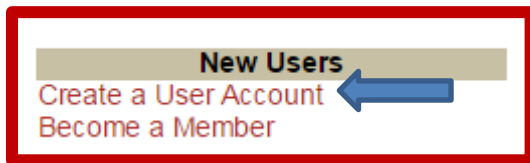
Name	
2015 Annual Conference	<a href="#">Register</a>
2015 Due Diligence	<a href="#">In Shopping Cart</a>
2015 Spring Symposium	<a href="#">No Registration Window</a>

# CREATING A NEW ACCOUNT

Select: "User Login" from the ADISA homepage



Select: "Create a User Account"



Complete the information to create an account:

A screenshot of the "CREATE ACCOUNT" form. The form is titled "CREATE ACCOUNT" and is located on the page. It includes a section for "NEW TO THIS SITE?" with a sub-header "NEW TO THIS SITE?". Below this, there is a note: "If you are new to this system or not sure if you've used this site before, enter your information below and click Continue." The form contains four input fields: "First Name: \*", "Last Name: \*", "Email: \*", and "Postal Code: \*". A "Continue" button is located below the input fields.

Select: "Continue"

Complete all required information in the application.

\* - indicates a required field.

## ORGANIZATION INFORMATION

What organization do you belong to?

I am affiliated with an organization.

Start typing your organization's name in the field above. If your organization does not appear, be sure your spelling is correct or an alternate name isn't available. If your organization's name still does not appear, choose the "My organization is not listed" option below

What is your role in the organization?

I am affiliated with an organization, but it does not appear.  
When selected, you will create your organization information on the next page.

I am not affiliated with an organization.

## BASIC INFORMATION

Login (email address): \*

Password: \*

Confirm Password: \*

First Name: \*

Last Name: \*

Suffix:

Email Address: \*

**Profile Photo**

**Change Profile Photo**  
 No file chosen  
Images larger than 120x120 will be resized

## PHONE NUMBERS

Use the Preferred? radio button to indicate the phone number at which you prefer to be contacted.

	Preferred?
Main Phone Number: * <input type="text"/>	<input checked="" type="radio"/>
Office Phone Number: <input type="text"/>	<input type="radio"/>
Fax Phone <input type="text"/>	<input type="radio"/>

*PLEASE NOTE: When finished, please note that once the application is completed, it will be reviewed and verified. Once reviewed, a confirmation email will be sent out to you. Then you may continue onto registering for the event.*