BB360



BB360 Quick Reference Guide

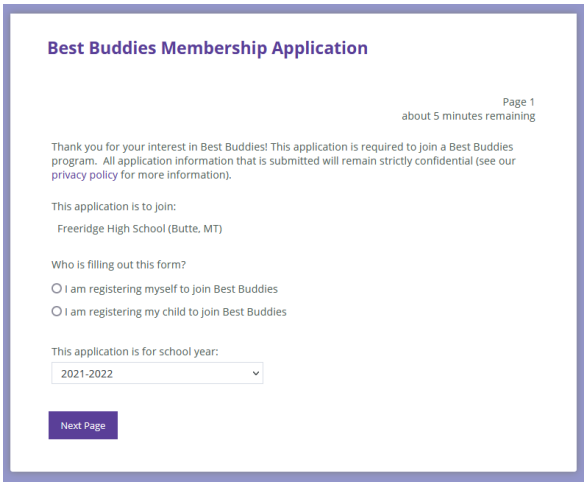
Admin access for Chapter Leaders and Advisors

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Getting Started

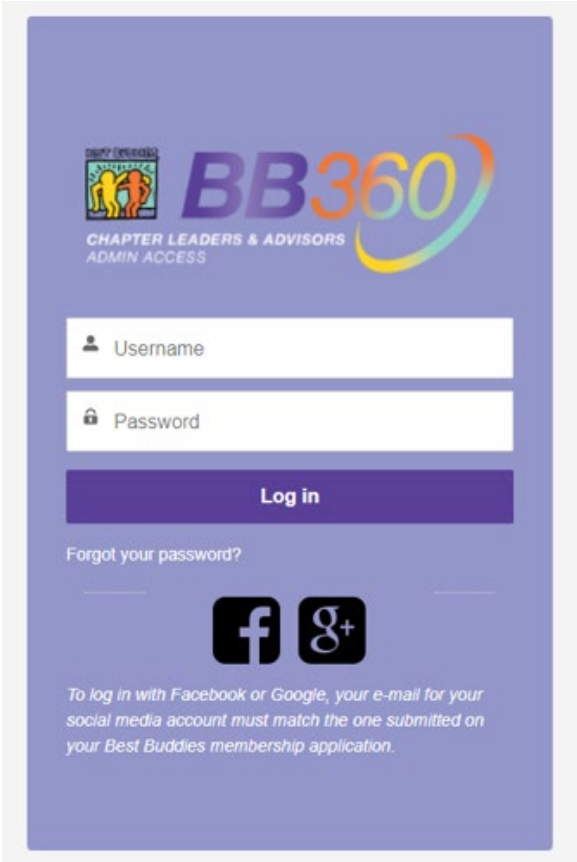
*This guide is an overview of features and general information about BB360. For more detailed step-by-step guides, please visit **bestbuddies.org/bbu/bb360**.*

BB360 is an online chapter management portal for Best Buddies chapter officers and advisors. Designed specifically for chapter leaders, BB360 is your one-stop shop for managing your members, matches, events and more. General members will not have access to BB360.



To get access to BB360, your first step is filling out a membership application at **bestbuddies.org/join**. For chapter presidents and advisors, your Best Buddies staff contact will then be able to give you access to BB360.

Please note: access to BB360 is not automated from your membership application; if you are waiting on login information, please reach out to your Best Buddies staff contact.



Logging Into BB360

Once you get access to BB360, you'll receive a *Welcome to BB360* e-mail with a link to join.

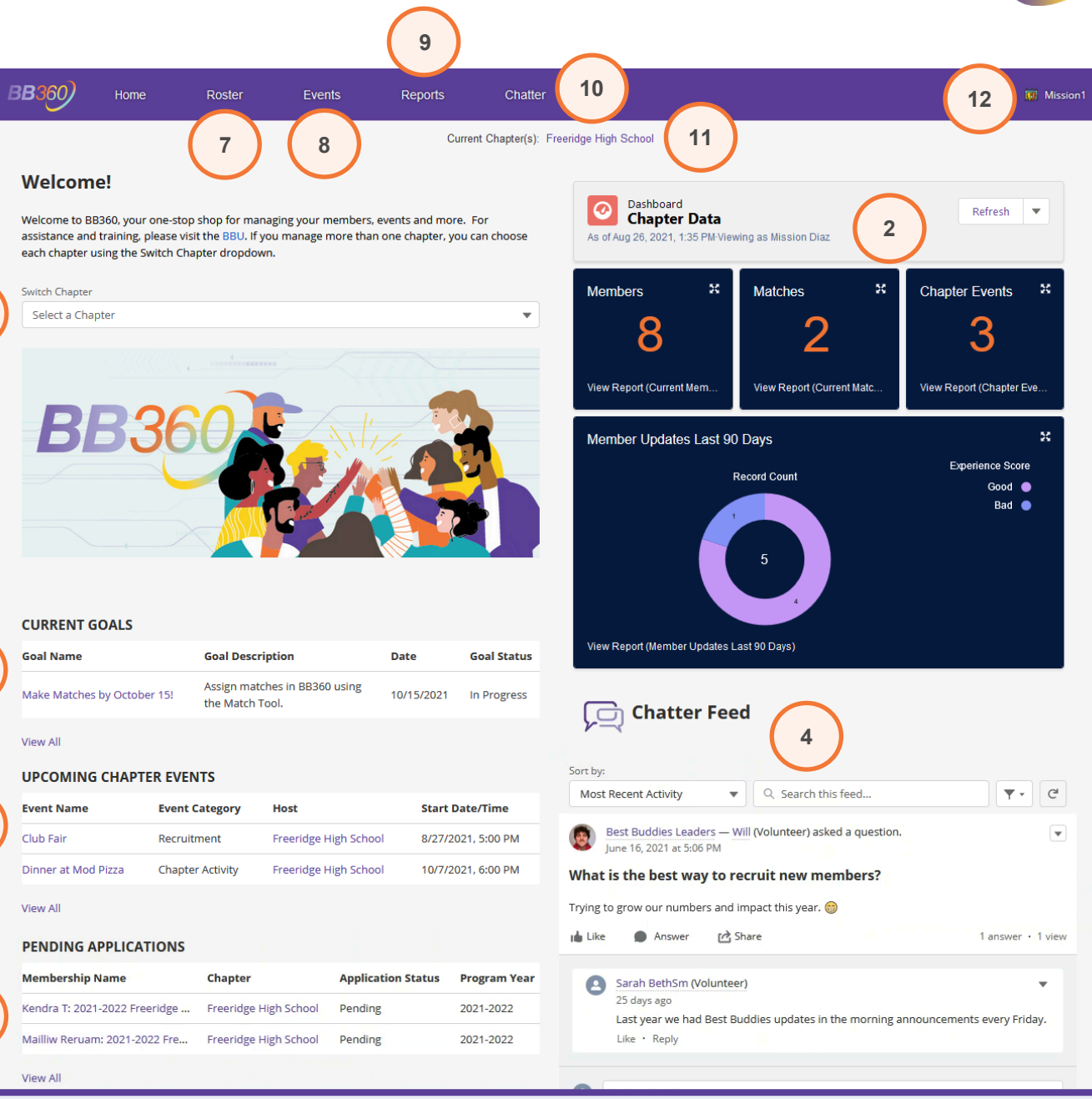
That link will take you to the BB360 login page at **bestbuddiesinternational.my.site.com**.

You can either create your own password or use your Facebook or Google account logins. For that to work, the e-mail on your Best Buddies membership application needs to match the one on your social media account.

If at any time you forget your password, use the "Forgot your password?" link on the login page.

If you are a new chapter or a school chapter at the beginning of the year, there will not be much information on the homepage of BB360 the first time you log in. Once your members start signing up and you start planning for the year, your homepage will display all the most recent information regarding your chapter.

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Homepage



1 CHAPTER SWITCHER
If you manage more than one chapter, use the drop down to switch between chapters

2 CHAPTER DASHBOARD
Current numbers and charts for your chapter; click Refresh to get the latest data

3 GOALS
List of current goals; click on the goal to update

4 CHATTER FEED
Latest posts and questions from chapter leaders

5 UPCOMING EVENTS
List of upcoming events for your chapter

6 PENDING APPLICATIONS
Membership applications that need to be processed

7 ROSTER
View memberships applications and buddy pairs

8 EVENTS
View, update, and create events for your chapter

9 REPORTS
View reports and charts about your chapter

10 CHATTER
Click More to view and join the chatter conversation

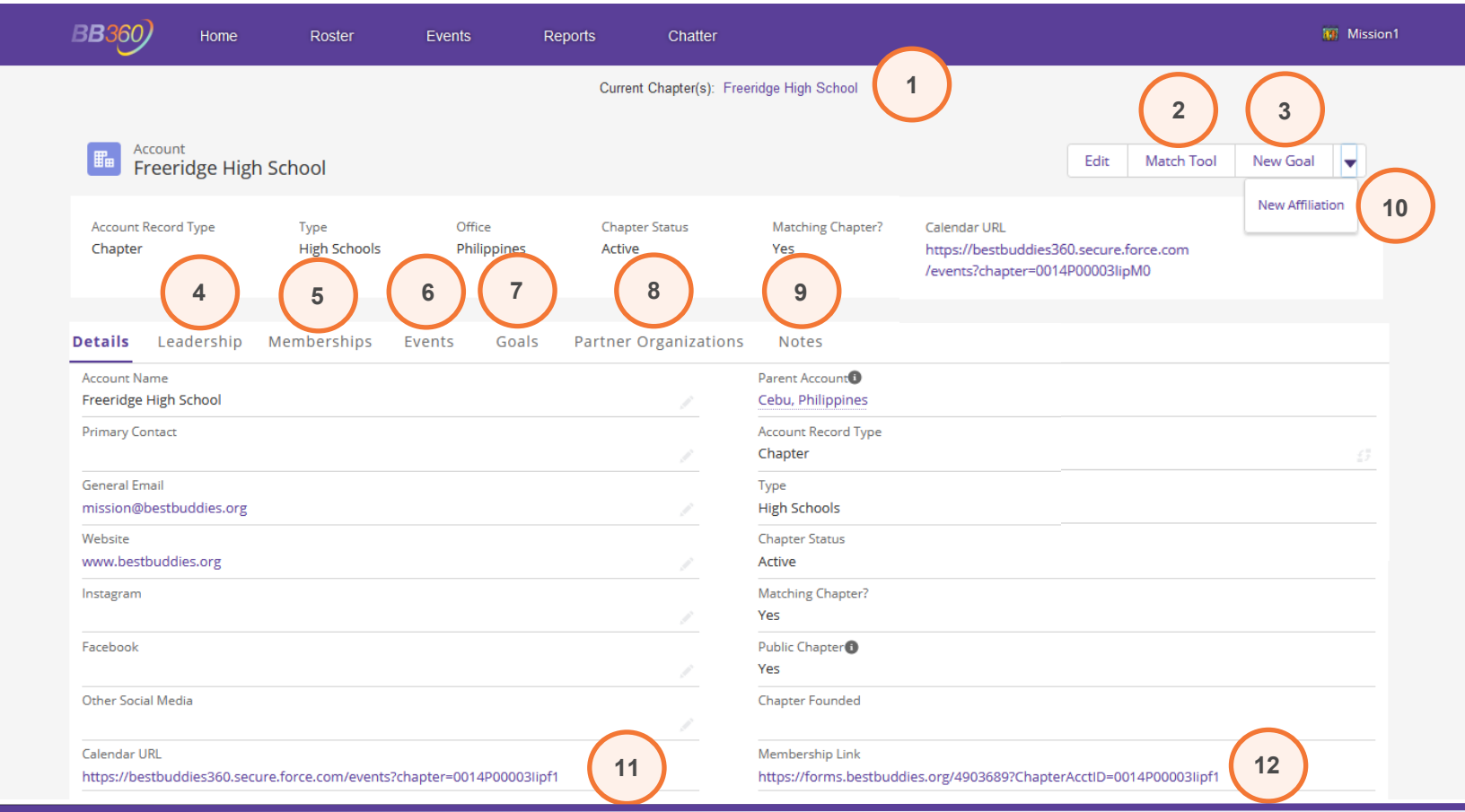
11 CHAPTER ACCOUNT
Click your chapter name to get your membership application link and use the match tool

12 YOUR PROFILE
Update your nickname, about me, and upload a pic!

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Chapter Account

Navigate to your chapter account by clicking the name of your chapter at the top of the page. Here you can view all details, members, leaders and events for your chapter. The Match tool is for creating one-to-one friendships and New Goal is for adding new goals for your chapter.

Your chapter's custom calendar URL and Membership Application link can also be found on your chapter account page.



1 CHAPTER ACCOUNT
Available on every page, click your chapter name to access your chapter account

2 MATCH TOOL
View all available members to be matched and create matches from filtered lists

3 NEW GOAL
Add a new goal for your chapter

4 LEADERSHIP
View current, previous and future officers and advisors

5 MEMBERSHIPS
List of all members, past and present, for your chapter

6 EVENTS
List of all events hosted by your chapter

7 GOALS
View past and current goals

8 PARTNER ORGANIZATIONS
View host sites and schools associated with your chapter

9 NOTES
View chapter history and previous chapter reports

10 NEW AFFILIATION
Add an officer or advisor to your chapter

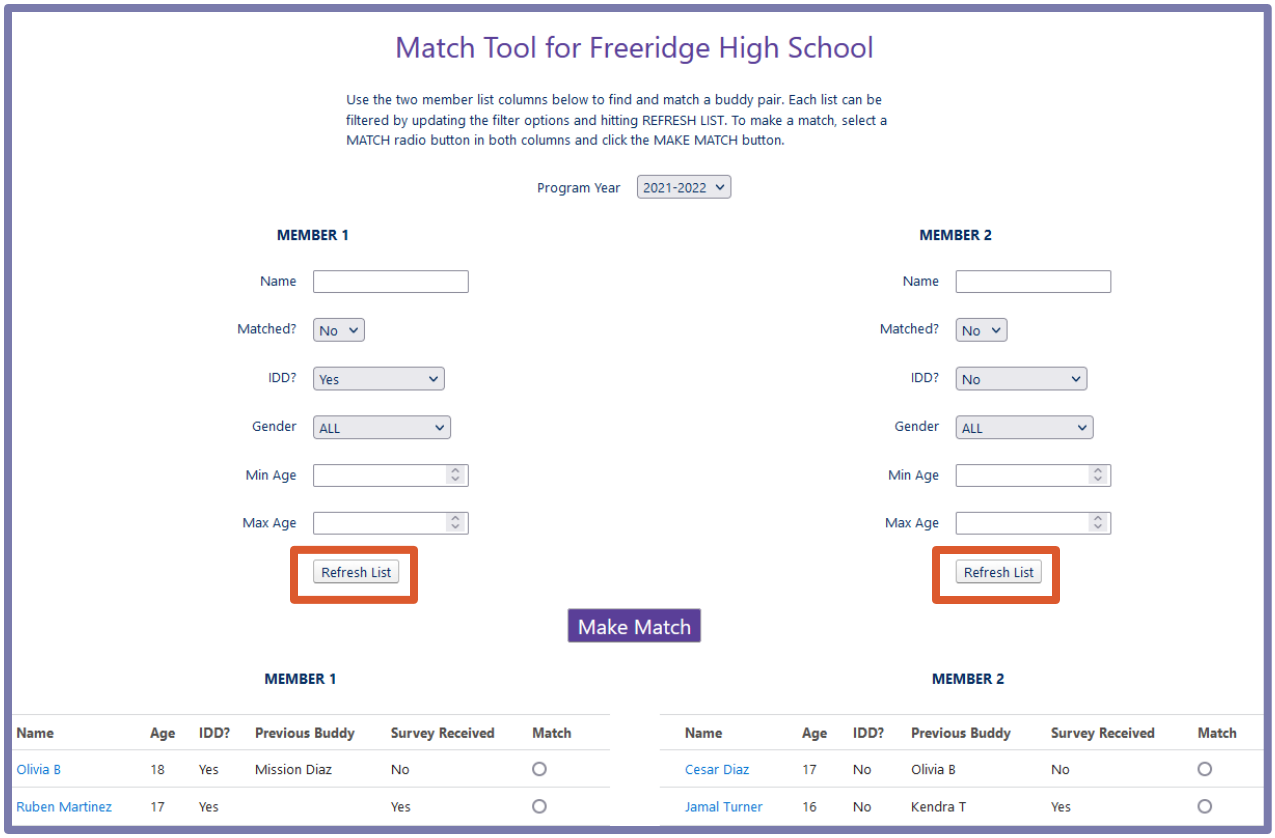
11 CALENDAR URL
Link to subscribe to your chapter calendar that you may send to members

12 MEMBERSHIP APPLICATION LINK
Link for your chapter's membership application to send to prospective members

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Match Tool

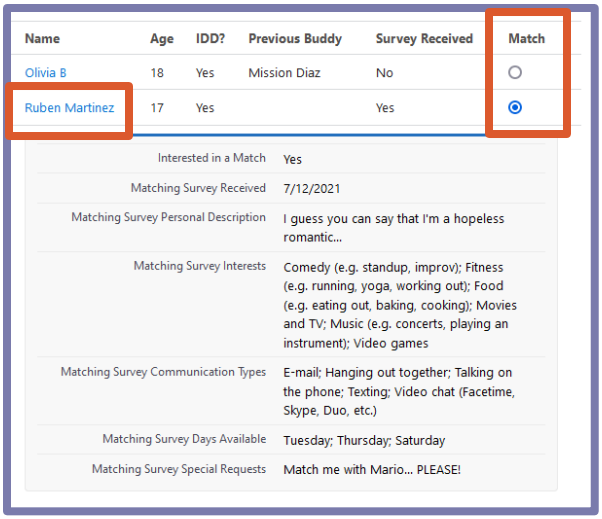
From your chapter account page, you can access the Match Tool by clicking the button in the top right corner. All members that indicated they are interested in a match on their membership application will be listed here.



There are two lists that can be filtered individually to help you connect the right people. You can search for a member's name, gender or age range. You'll want to click the Refresh List button any time you make changes to the filter selections for each column.

If your members submitted matching surveys, you can review their responses by selecting their names in the list. To make a match, click the radio buttons next to the members' names and click the Make Match button.

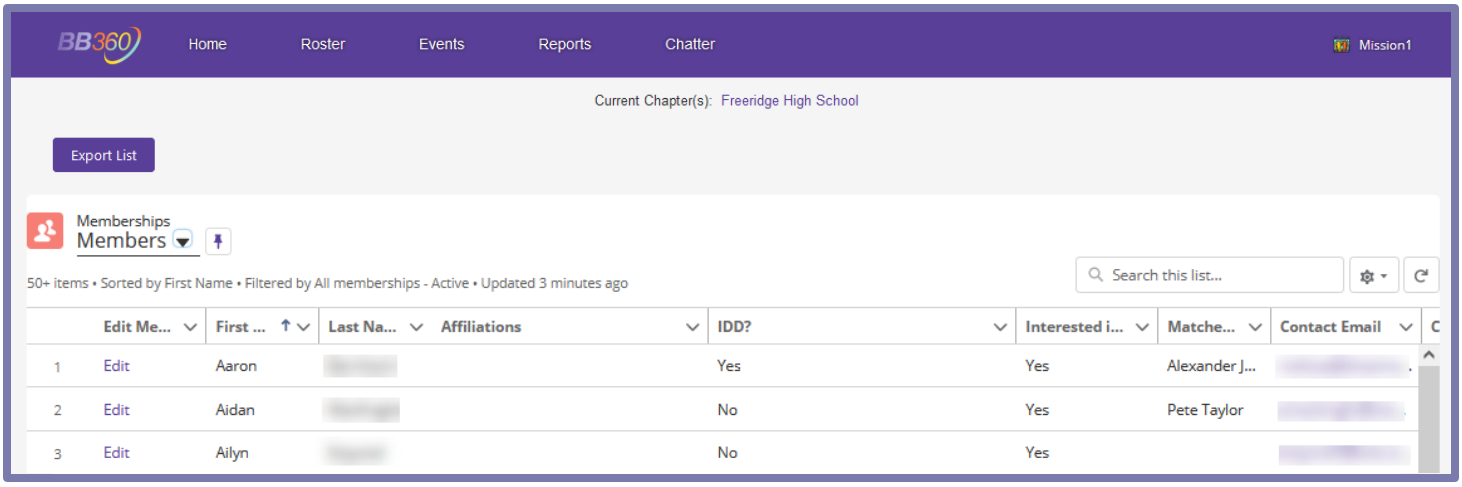
Remember, you can only access the match tool from the chapter account page by clicking the name of your chapter at the top of your screen.



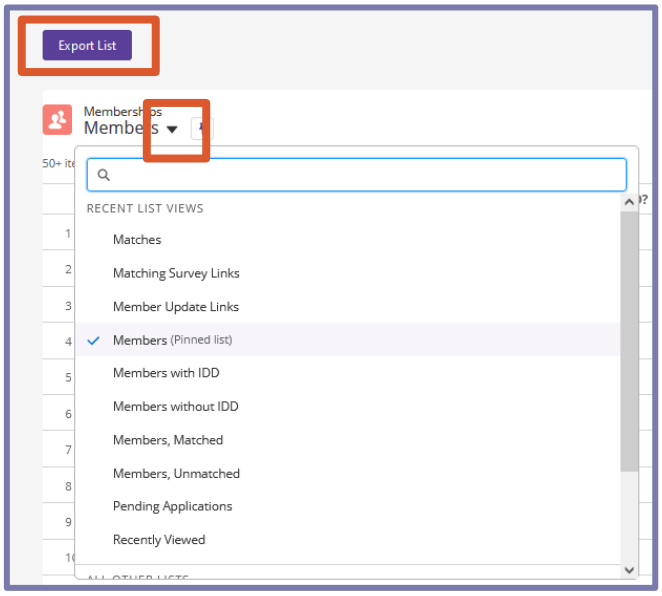
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Memberships & Matches

On the Roster tab in BB360, you can export a list of member contact information, assign members as officers, and get individual form links for each member, like the matching survey or member update form.

When you navigate to Roster, the default list view is for current members.



To switch list views, select the dropdown arrow to see other options. You can view different groups of members, or get different lists for matching survey links, etc. Click the Export List button to download the list into an Excel document.



Pending Applications

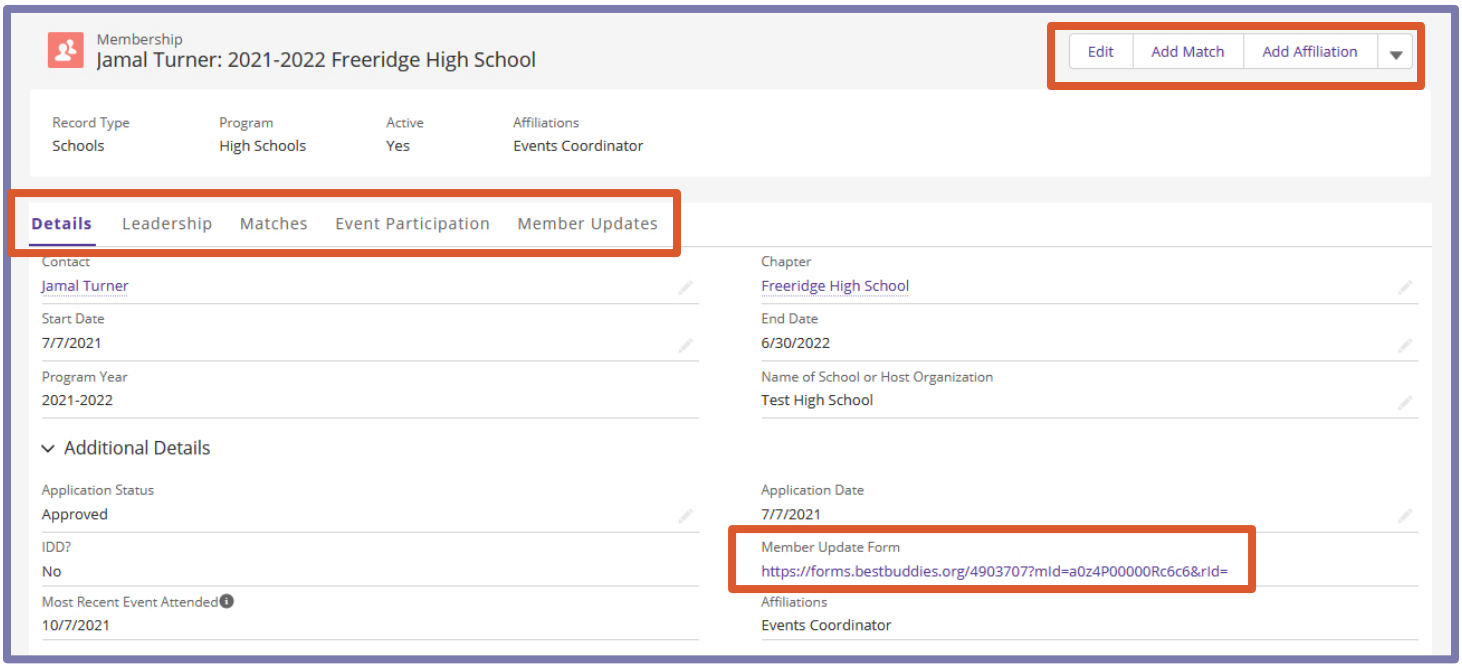
In BB360, membership applications that are submitted with parental consent (if needed) are automatically marked as approved. As the chapter leader, you should review this list to ensure that all members are currently part of your chapter.

Selecting the Pending Applications list view in the Roster tab will pull a list of applications that need to be processed. A pending status means that we are still waiting on parental consent. Action Required is for applications received with potential background history that may make them ineligible to participate. Reach out to your Best Buddies staff contact to review these applications – some may require a background check to be able to participate in Best Buddies.

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Memberships & Matches

To view an individual's membership record, click Edit next to their name from the list view. You can add a match, an affiliation (officer position) and view event participation. On the record details page you can also find individual links for different forms that the member can submit.

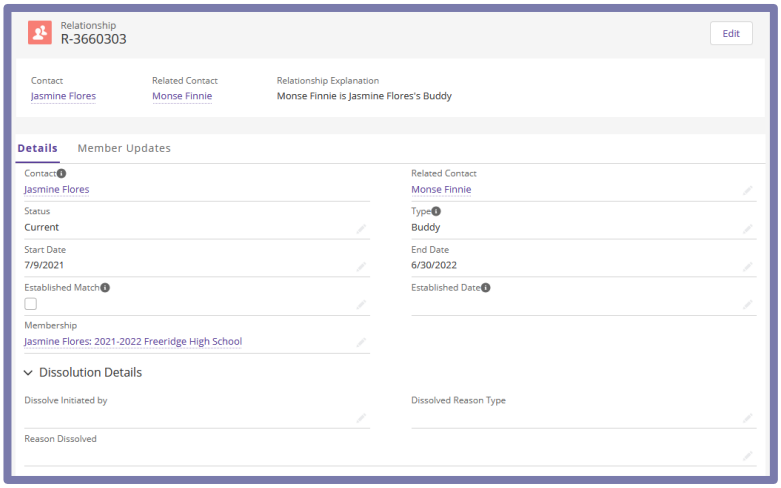


Matches

On the Roster tab, selecting the Matches list view will pull a list of your current matches. If it is the beginning of the school year, or your chapter does not make one-to-one friendships, the list will be empty.

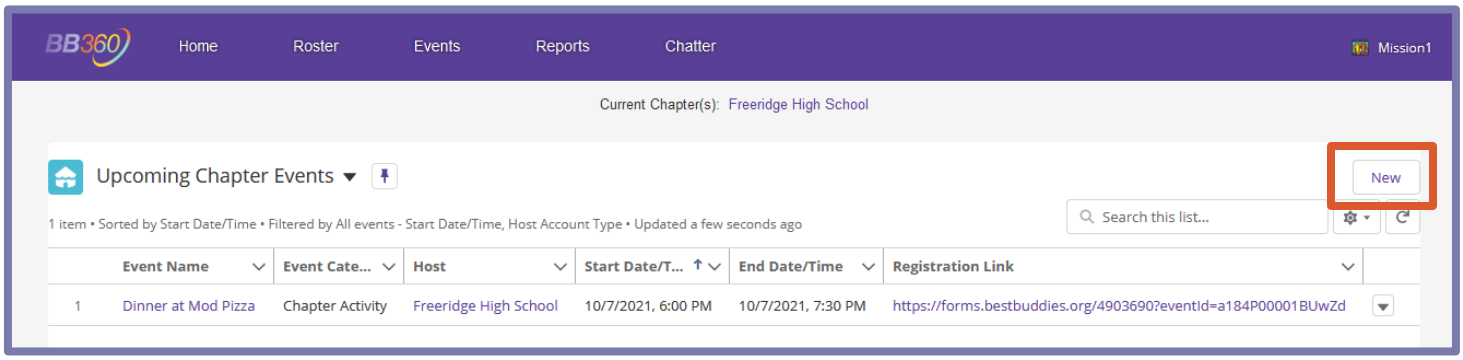
If you need to make edits to a match, click Edit on the row of the match to update. This will take you to the relationship record where you can update start/end dates and dissolve a match if necessary.

If you do not see an Edit link next to a match, there is likely an error with double matching and you'll need to click the member's name to access the match information.



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Events

In BB360, you can view all past and future events for your chapter in the Events tab. BB360 offers the ability to create registration forms for your events and track attendance. Events created in BB360 will appear on your chapter calendar.



To create a new event, click the New button.

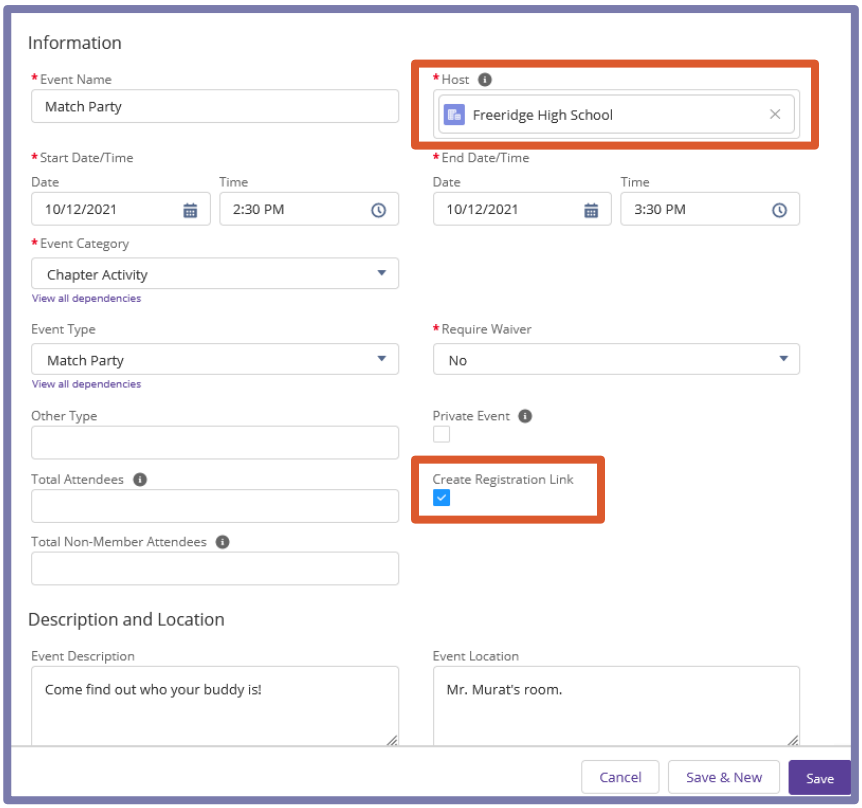
Important: when adding an event in BB360, make sure that you put your chapter as the Host.

Choose the most relevant Event Category, including Chapter Activity, Training, and Fundraiser, and the Event Type if applicable.

If you wish to have BB360 create a registration form for your event, check the box for Create Registration Link.

You may choose to include an event waiver on your registration form using the Require Waiver field.

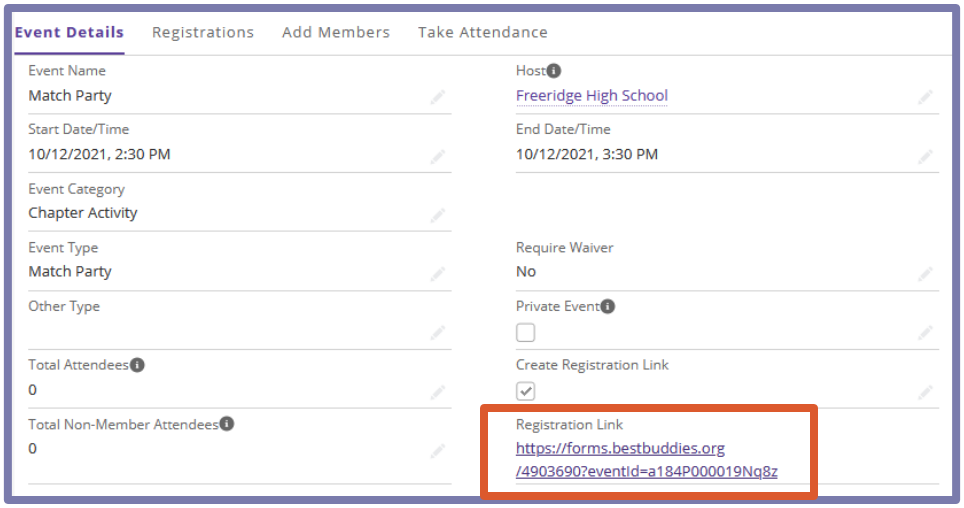
Your event description and location will also appear on your chapter calendar.

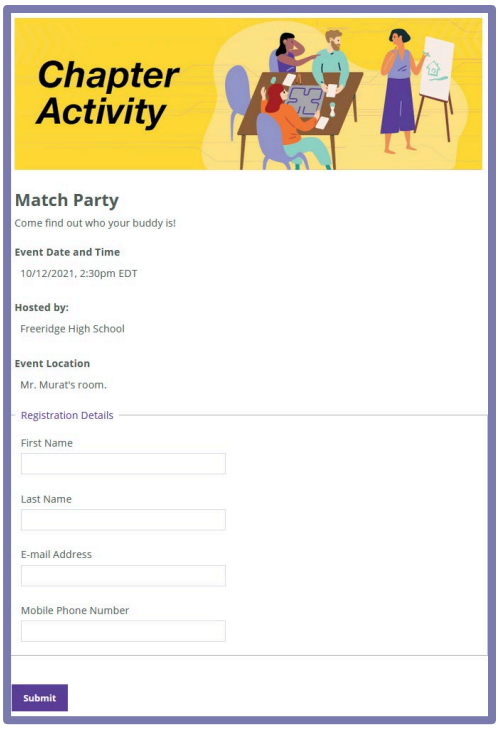


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Events

Once you save the event you can find the registration link on the event details page. Send the link out to your chapter members to have them register for the event.



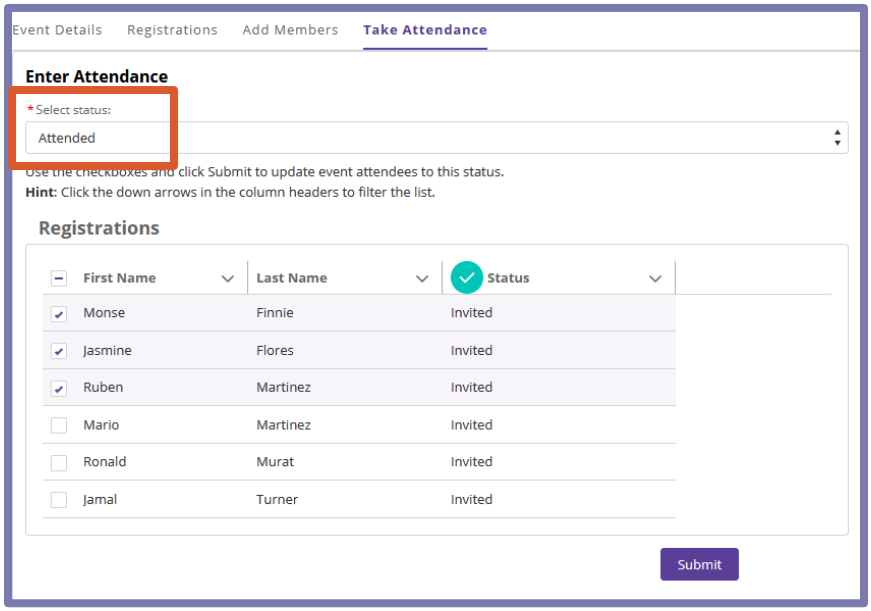


Once registrations begin to come in you can track them in the Registrations tab of the Event Record.

To add attendees to your event use the Add Members tab. Select which members you wish to add and click Submit.

To update a member's registration or attendance, click the Take Attendance tab. Here you can select the status of the attendee, including Attended, Did Not Attend and Invited, check the boxes next to the names to update, and click Submit.

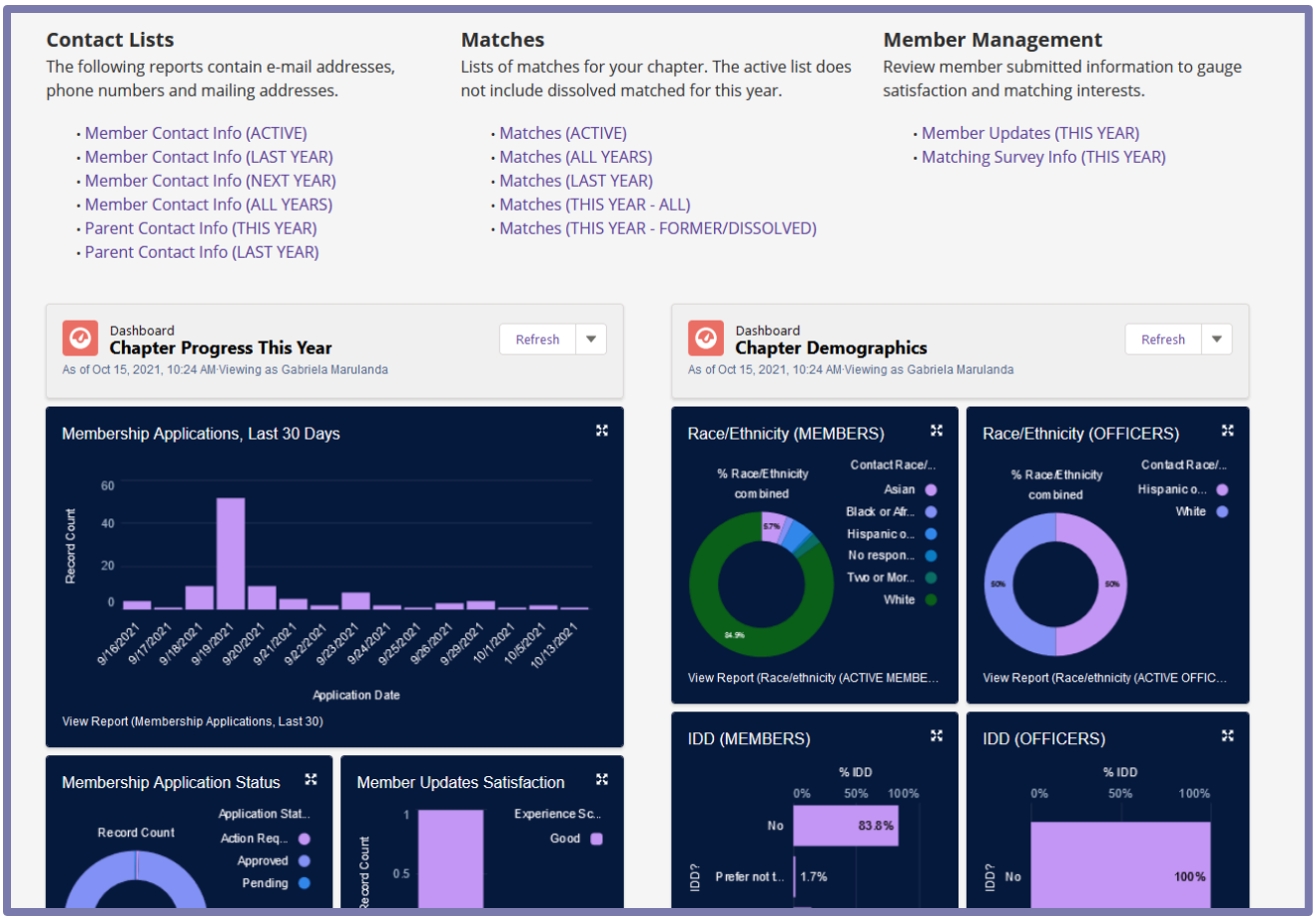
If you are not tracking individual attendance, you can always update the attendance numbers on the event details page.



Note: not every event needs to have registrations tracked in BB360. Work with your Best Buddies contact to decide which events you should track this way.

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Chatter

The reports tab in BB360 has a list of reports for your chapter as well as various dashboards of charts. This is where you can review chapter information for previous years. There are reports for members and matches for the current program year and all years your chapter has been open.



Remember to click the Refresh button on the dashboards to view the most up to date information.

When you select a report, a new page will open for you to review the data. Click export to download the information to an Excel document.

