

PPAI Member Portal

Member Account Setup Guide – Admin

Permissions & Parameters

What permissions are available & what do they do?

- **Primary** – Limit: 1 per company. Full access to update company details, benefit assignments, purchases, company demographics, and invoices, approve affiliation requests, and remove individuals from the roster.
- **Organization Administrator** – Limit: 2 per company. Same access as the Primary Contact.
- **Billing** – No limit. Can view company demographics, update address and phone numbers, and manage purchases, invoices, payments, and memberships.
- **View Only** – No limit. All employees on the roster who need visibility into company details but no ability to make changes.
- **Voting Rep** – Limit: 1 per company. Same visibility as View Only.
- **Product Safety Rep** – No limit. Same visibility as View Only, plus access to update product labels.
- **Government Contact** – Limit: 1 per company. Same visibility as View Only.

Permissions & Role Labels

Edit Whitestone

Affiliation Role

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Affiliation Start Date

2/2/2016

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RoleLabel

Primary, Voting Rep, Prod Safety Rep, G...

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RoleLabel

Primary, Voting Rep, Prod Safety Rep, G...

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Organization Administrator

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View Only

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Voting Rep

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Prod Safety Rep

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Government Cotact

Company Rosters can have multiple Role Labels attached at any given time. Each Role Label dictates what that individual is able to view or do within the PPAI Member Portal. All new Roster additions will automatically be assigned the View Only label. Primary Contacts and Organization Administrators can update an individual's Role Label(s) at any time.

What you can update/change

Company Contact Information

Contact Information			
Key Contacts	Company Contacts	Affiliation Requests	Expand View
Contact	Affiliation Role	RoleLabel	Action
Drew Holmgreen 100-002-310		Organization Administra...	
Edie Berntson 100-000-006		Organization Administra...	
John Twist 100-002-469		Organization Administra...	
Melissa Ralston 100-002-417		Primary , Prod Safety Rep	
West Monroe (Test) 100-002-572		Organization Administra...	

Key Contacts are the contacts who can make updates and changes within the organization. Your Admins and Primary Contact

Company Contacts is where you will find your full roster list (minus the Admins & Primary Contacts). The majority of the roles here are View Only permissions.

Affiliation Requests is where you will find all requests that do not use the same domain as your organization.

Company Contacts

Contact Information

[Key Contacts](#) | [Company Contacts](#) | [Affiliation Requests](#)

[Expand View](#)

Contact	Affiliation Role	Affiliation Start Date	Affiliation End Date	RoleLabel	Status	Action
Aaron Merritt 100-002-502		1/1/2026	-	View Only	● Active	
Accounts Payable 100-001-090		1/1/2026	-	View Only	● Active	
Alok Bhat 100-001-095		1/1/2026	-	View Only	● Active	
Angela Steele 100-002-429		1/1/2026	-	View Only	● Active	
Arianna Johnson 100-002-133		1/1/2026	-	View Only	● Active	

Here is where you will maintain your roster, in real time. To see your full roster list, select the Expand View. To edit your roster, select the edit pencil.

Editing your Roster

Edit affiliation with Aaron Merritt

Affiliation Role

Affiliation Start Date

1/1/2026

Affiliation End Date

RoleLabel

View Only

Cancel Save

When you select the edit pencil, an Edit Affiliation box will open with all of the options.

- Affiliation Role = department the company contact is associated with.
- Affiliation Start Date = the date the company contact was added to the roster. This date makes them active in the portal and active within your organization.
- Affiliation End Date = the date the company contact was removed from the roster. This date makes them inactive in the portal and inactive within your organization.
- Role Label = is the permissions that they are granted within the portal and the company. (ie. Primary, Admin, etc.)

Affiliation Requests

Contact Information

Key Contacts

Company Contacts

Affiliation Requests

Pending

Approved

Rejected

Expand View

Contact	Request Date	Status	Role	Action
No data				

In the Affiliation Requests, you will have option to view Pending, Approved and Rejected requests. As the Admin and/or Primary, you can remove or approve the affiliations anytime.

Preferences/Organization Demographics

My Interest and Demographics

Company

Number of Employees	51-100	✕	▼	i
PPAI ID	304174			i
Company Association Memberships	Select		▼	i
International Company	No	✕	▼	i
Key Competitors				i
Key Clients				i
Advertising Spend or Budget	Select		▼	i

Admins and Primary Contacts are the only roles with permission to update the Organization's Demographics. These demographics are used to share marketing trends, research, and information based on your organization's needs and interests.

Company Association Memberships are other memberships your organization is part of that PPAI recognizes or works with.

Benefits & Assignments

Benefits

Business – Professional Diamond

Details <u>Benefit Assignment</u>			
Start Date: 10/03/1903 End Date: 02/04/2040			
Benefit	Available	Used	Remaining
No Records found			

If your membership has a limited number of seats for the LMS, you'll see that benefit here for assigning purposes. There will be a drop down box for you to select who gains access to the LMS for education. If you receive certification waivers, you'll share that "code" with the Company Contact who has LMS access so they can use it during the certification purchase. You can change the LMS seat assignment at any time.

Full Benefit Listing

Benefits

Active | Utilization | Expired

Benefits	Discount	Expires On	Remaining Benefit	Used Benefit
No Records found.				

Here you will see all benefits available to your organization based on the tier it acquired. You will have visibility into all benefits that have been used, expired, or still open to use.

Email Notifications

You have been invited to join a members portal

Follow the instructions on the invitation email. Once you are redirected to the Portal, you will be prompted to change your password immediately.

Welcome, We are sharing the login link and temporary password for accessing your account on our platform.

To take advantage of full benefits, please complete your profile on the Customer Portal including:

- Address(es)
- Phone Number(s)
- Demographics & Preferences

Please find the details below:

Temporary Password : **UserPassword**

[Click here to Login](#)

For security reasons, we recommend that you log in as soon as possible and update your password. If you encounter any issues or have any questions, Please don't hesitate to contact us at [CompanyPrimaryContactNumber](#)

Login Link [UserCreatedLink](#)

What happens when you request to join an existing organization?

When you submit a request to join an organizations roster, you will receive this email confirming the request.

When your submitted request is approved by the admin, you will receive an email confirming your connection to the organization.

If your request is denied, you will receive an email notification and requesting you to reach out to your associations administrator on the denial.

Hi ContactName,

We received your request to link your account to CompanyName. This request is currently pending review.

You will receive a follow-up email once a decision has been made.

Hi ContactName,

Your request to link your account to CompanyName has been approved. Your profile has been updated accordingly.

Hi ContactName,

Your request to link your account to CompanyName was not approved at this time. Please contact your association administrator if you believe this was made in error.
