Department Billing Contact Guide – IPMBA

As a department billing contact, you can efficiently manage and pay for employee memberships and certificates through the Re:Members portal. Bulk transactions are supported with assistance from IPMBA staff and our updated system.

1. Assign Yourself as Billing Contact

If you are responsible for billing, email info@ipmba.org to be added as a Department Billing Admin.

2. Register and Activate User Accounts

Encourage all course participants to create a database account at **members.ipmba.org**. This enables direct membership purchases and certificate downloads after course completion.

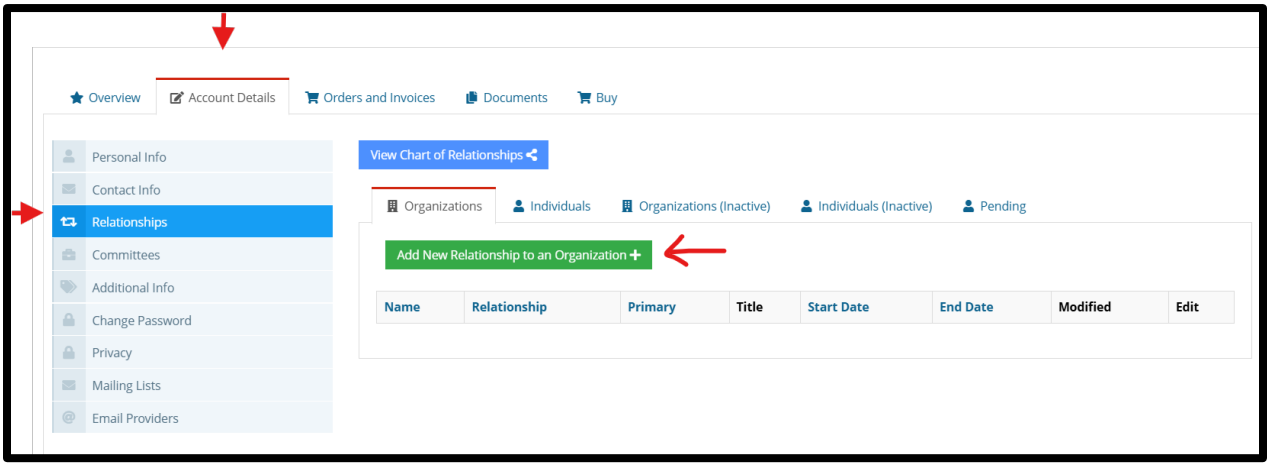
Most logins use work emails. For issues logging in, contact info@ipmba.org or use “Forgot my password” at members.ipmba.org.

All students should create an account at the completion of every course taught.

3. Establishing an Organization Relationship

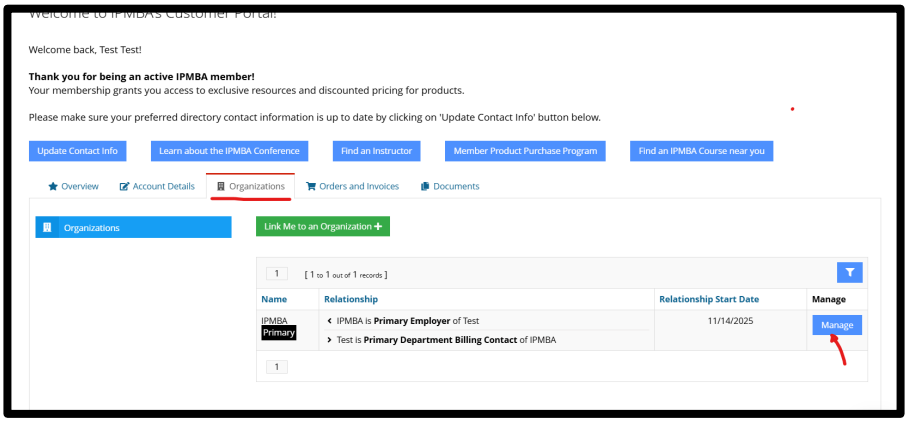
Ensure each user’s profile is linked to your organization. This relationship is required for you to process their membership payments. Users are prompted tp add this relationship during account creation or via Account Details> Relationships > Add relationship to organization.

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4. Managing and Paying for Memberships

As a billing admin, you can manage and pay for memberships for individuals associated with your organization. Access your organization profile via 'Organizations' > 'Manage' in your account. Once in the organization's profile you can review the related individuals by opening the 'Individuals' tab. Or you can pay the open balances for the related individuals.



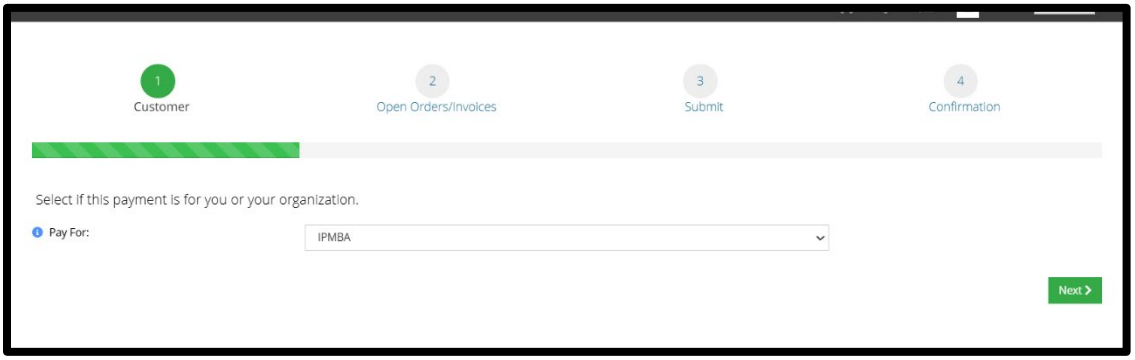
To pay open invoices:

a. Click 'Search for Open Balances'.

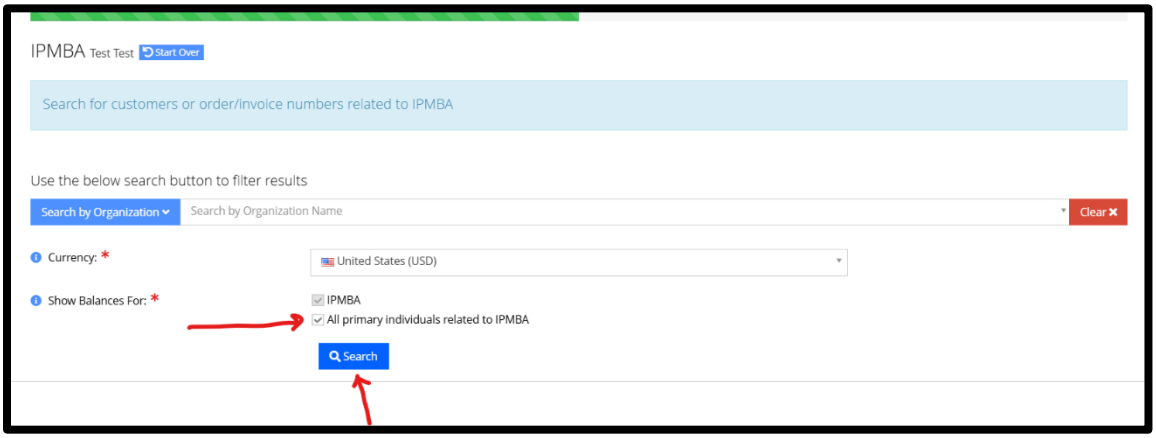
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b. Set 'Pay for' to your organization name.

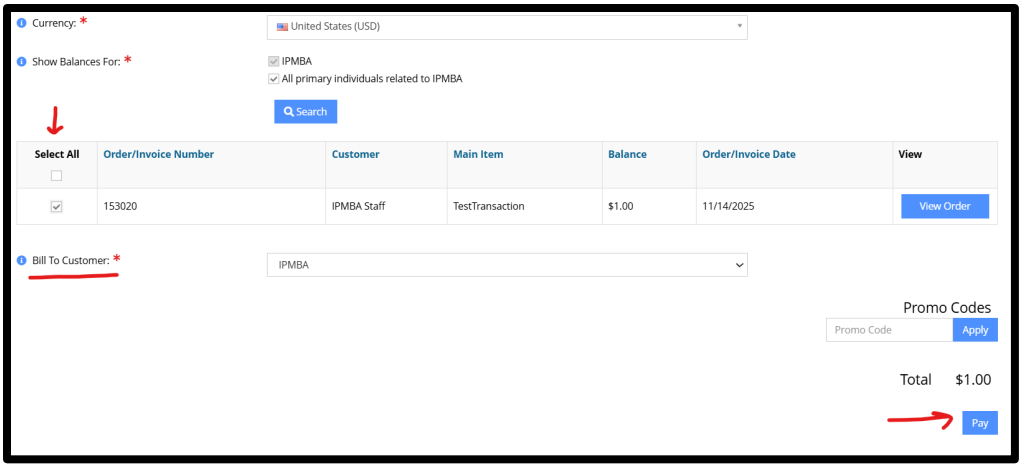


c. Select 'All primary individuals related to [Org name]' and click 'Search'.



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d. Review and select invoices to pay, ensuring 'Bill to Customer' is set to the organization.



e. Proceed to payment via credit card. For check or wire payments, contact info@ipmba.org.