

CP Locations

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Within the **HBA Corporate Partner Information Module** there exists the ability for member leaders, CP key contacts, and HBA staff to add addresses and site-specific contacts for specific Corporate Partner sites. This data is saved in the HBA's database, and all the site/location data collected results in a CRM-like tool for leaders now and in the future to ease and aid engagement across a company's locations.

The primary workflows for CP location **SEARCHING** (by region and for HQ sites) and **ADDING** locations and points of contact are listed below. Or [CP-POC Entry Workflows ML-AM.docx](#) [].

Searching for Corporate Partner locations by region

Description: Completing this workflow will provide the user with CP's satellite locations in the region of interest and point of contact information.

- Log in to HBA
- Select - HBA Corporate Partner Information on left vertical toolbar
- **Corporate Partner Locations**

- Chapter Region - Select Region by typing first 3 characters or using dropdown



The screenshot shows a dropdown menu titled "Chapter Region". The selected option is "Pacific Region - San Diego", which is displayed in a purple box with a small 'x' icon to its right. A small downward-pointing arrow is visible on the right side of the dropdown box.

- Once the region or regions have been populated, select search
- Satellite Locations of Corporate Partners, along with primary contact info will be displayed

Searching for Corporate Partner HQ locations by region

Description: Completing this workflow will provide the user with CP's headquarter locations in the region of interest.

- Login to HBA

- Select - HBA Corporate Partner Information on left vertical toolbar
- **HBA Corporate Partner Search**

HBA Corporate Partners

Please begin by searching for the Corporate Partner parent company or by any other desired parameters and click search.

Company Name	Corporate Partner Level (Influencer, Purple, Gold and Silver)
<input type="text"/>	<input type="text"/>
Country	Chapter Region
<input type="text"/>	<input type="text"/>

SEARCH CLEAR FILTERS

- Chapter Region - Select Region by typing first 3 characters or using dropdown

Chapter Region

Pacific Region - San Diego x

- Once region or regions have been populated, select search
- Locations of Corporate Partners along with primary contact info will be displayed

Name	Membership	Primary Contact	Address 1
Neurelis, Inc.	Corporate Partner - Teal Package	[REDACTED]	3430 Carmel Mountain Rd Ste 300 San Diego, CA 92121-1071 US
Neurocrine Biosciences, Inc.	Corporate Partner - Elevate Package	[REDACTED]	6027 Edgewood Bend Court San Diego, CA 92130 US
QuidelOrtho	Corporate Partner - Gold Package	[REDACTED]	9975 Summers Ridge Rd San Diego, CA 92121-2997 US

Adding locations or points of contact to a CP satellite office

Description: Completing this workflow will provide the user with the steps to add a CP location or point of contact to a CP’s satellite office information.

Start with the - as *Searching for Corporate Partner locations by region Workflow*

- *Login to HBA*
- *Select - HBA Corporate Partner Information on left vertical toolbar*
- **Corporate Partner Locations**
- *Chapter Region - Select Region by typing first 3 characters or using dropdown*
- *Once region or regions have been populated, select search*
- *Satellite Locations of Corporate Partners along with primary contact info will be displayed*
- (if adding new location) Click the + to add a new location and populate all address details known
- (if adding contact only) Select desired location to add point of contact using the edit icon

- **Location Contact** is most desired entry

1. **Important** - Contact **must** be in the HBA system to populate this search

Location contact (begin typing last name first to locate in system)

1. Begin by typing last name, select desired contact
2. Select SAVE
3. Search region again to confirm data entry in **Primary Contact Column** and **Email column**
4. Point of contact for the CP's satellite location should display as desired

- **Location Contact name and email (if name is not already in system)**

1. **Important** -First/Last Name and email is required
 1. Free text first and last name and email address only
 2. Select SAVE
 3. Search region again to confirm data entry in **Additional Contact Information** column
 4. Point of contact for the CP's satellite location should display as desired
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