

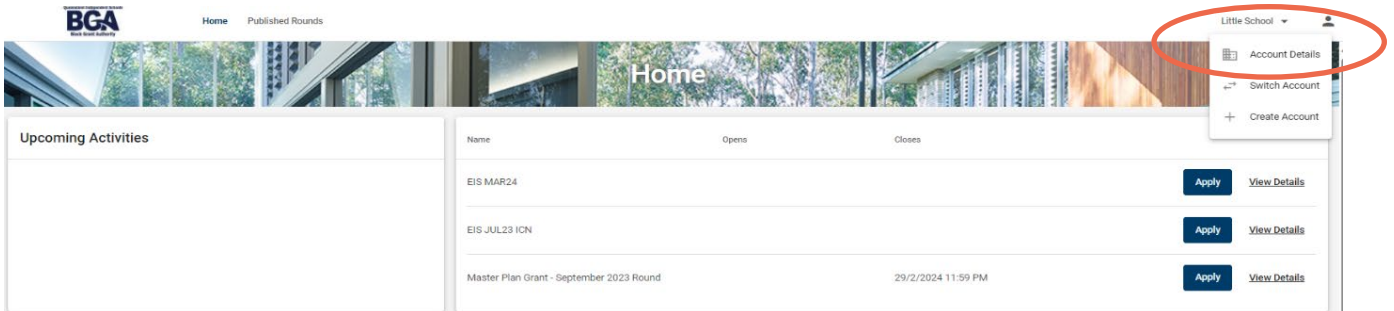
Maintaining Contacts

A school site's Account Administrator is the Client Portal user responsible for maintaining the contacts related to the site within the Client Portal.

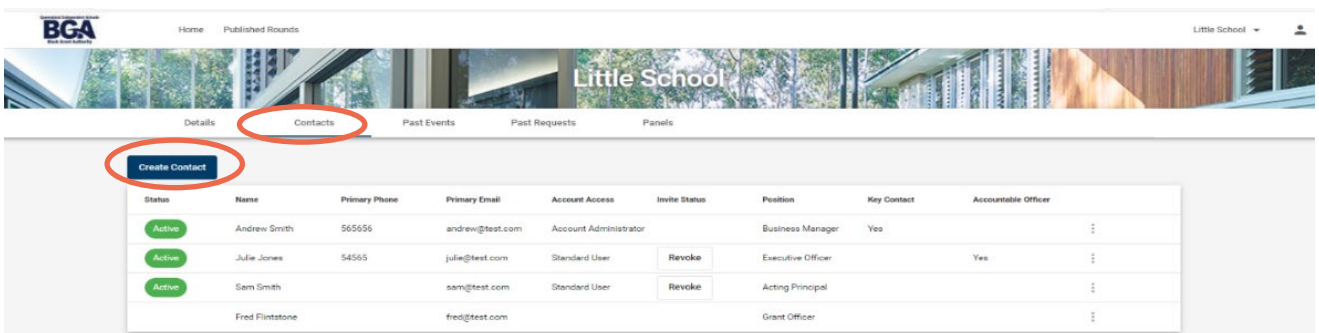
Invite Users to a Business Account

SPECIAL NOTE: For schools with multiple campuses, please **DO NOT** invite the same user to multiple business accounts in the Client Portal. Instead, contact QIS BGA who will arrange access for all relevant people to all relevant accounts.

- From the Client Portal Home Page, click an account name and select *Account Details*.



- From the Contacts tab, select *Create Contact*.





3. Invite a user by completing the contact's details and choose their user access as either Account Administrator or Standard User and select Save.

There can be multiple Account Administrators and multiple Standard Users.

Details Contacts Past Events Past Requests Panels

Create Contact

Status Name Primary Phone Primary Email Account Access Invite Status Position Key Contact Accountable Officer

Create Contact

First Name * 0/200

Last Name * 0/200

Email 0/200

Send Invitation

An invitation to connect this contact to the organisation will be sent to the above email address.

Select a role for the new contact

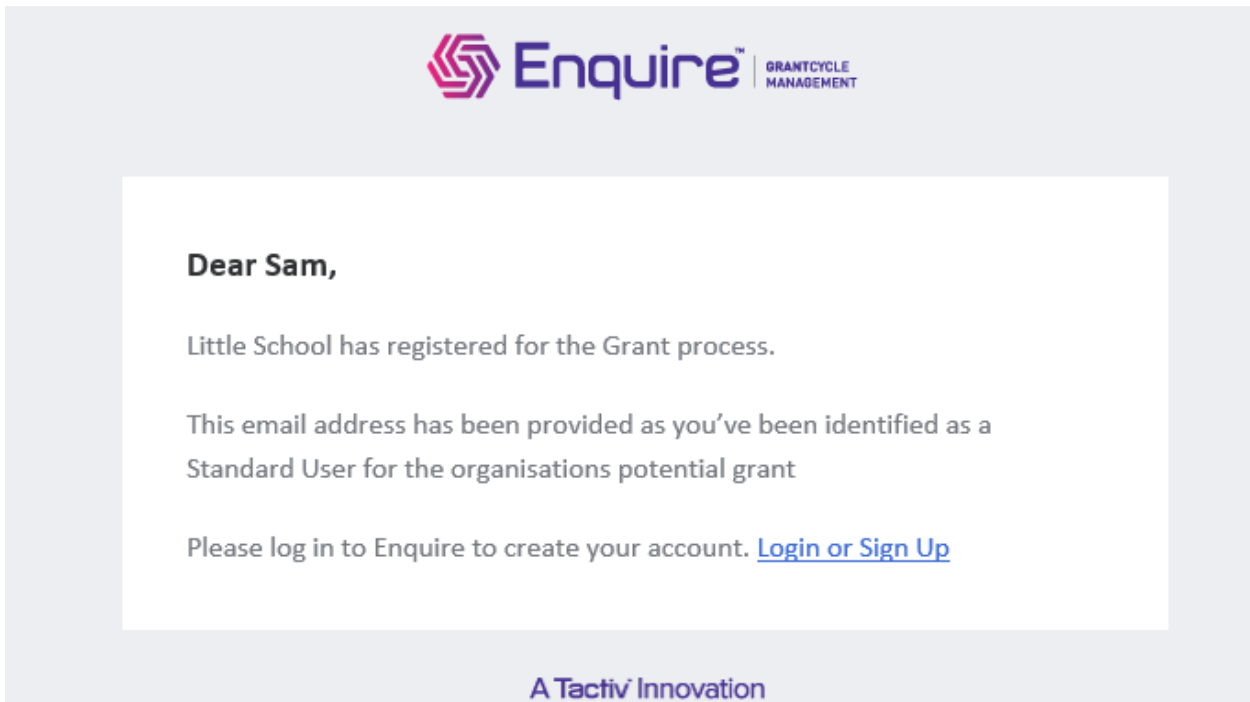
- Standard User has access to view Business Account details, and can submit forms and claims
- Account Administrator has full access to manage this Business Accounts details, Users and submit forms

Account Administrator

Standard User

Cancel Save

4. An invitation will be sent to the contact allowing access to the Business Account.





Update contact details

1. Select the morevert (three dots) associated with the relevant user.

The screenshot shows the BGA 'Little School' interface. At the top, there is a navigation bar with 'Home', 'Published Rounds', and 'Little School'. Below this is a header image with the text 'Little School'. A menu below the header includes 'Details', 'Contacts', 'Past Events', 'Past Requests', and 'Panels'. The main content area features a 'Create Contact' button and a table of contacts. The table has columns for Status, Name, Primary Phone, Primary Email, Account Access, Invite Status, Position, Key Contact, and Accountable Officer. The first row, for Andrew Smith, has a red circle around the three-dot menu icon in the 'Accountable Officer' column.

Status	Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer
Active	Andrew Smith	565656	andrew@test.com	Account Administrator		Business Manager	Yes	⋮
Active	Julie Jones	54565	julie@test.com	Standard User	Revoke	Executive Officer	Yes	⋮
Active	Sam Smith		sam@test.com	Standard User	Revoke	Acting Principal		⋮
	Fred Flintstone		fred@test.com			Grant Officer		⋮

2. Choose *View* and access the menu, allowing details to be edited, and then *Save* the required changes.

This screenshot shows the same table as the previous one, but with the 'View' menu open for the first contact, Andrew Smith. The menu options are 'View', 'Make Key Contact', and 'Make Accountable Officer'. The 'View' option is highlighted.

Status	Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer
Active	Andrew Smith	565656	andrew@test.com	Account Administrator		Business Manager	Yes	⋮
Active	Julie Jones	54565	julie@test.com	Standard User	Revoke	Executive Officer	Yes	⋮
Active	Sam Smith		sam@test.com	Standard User	Revoke	Acting Principal		⋮
	Fred Flintstone		fred@test.com			Grant Officer		⋮

- View
- Make Key Contact
- Make Accountable Officer

Remove access

1. To remove a user from the Business Account, find the relevant user and select *Revoke*. The user will no longer be able to access the Business Account. They will not receive a notification.

This screenshot shows the same table as the previous ones, but with the 'Revoke' button highlighted for the second contact, Julie Jones.

Status	Name	Primary Phone	Primary Email	Account Access	Invite Status	Position	Key Contact	Accountable Officer
Active	Andrew Smith	565656	andrew@test.com	Account Administrator		Business Manager	Yes	⋮
Active	Julie Jones	54565	julie@test.com	Standard User	Revoke	Executive Officer	Yes	⋮
Active	Sam Smith		sam@test.com	Standard User	Revoke	Acting Principal		⋮
	Fred Flintstone		fred@test.com			Grant Officer		⋮



Managing Roles

An active user can be allocated to be a Key Contact or an Accountable Officer.

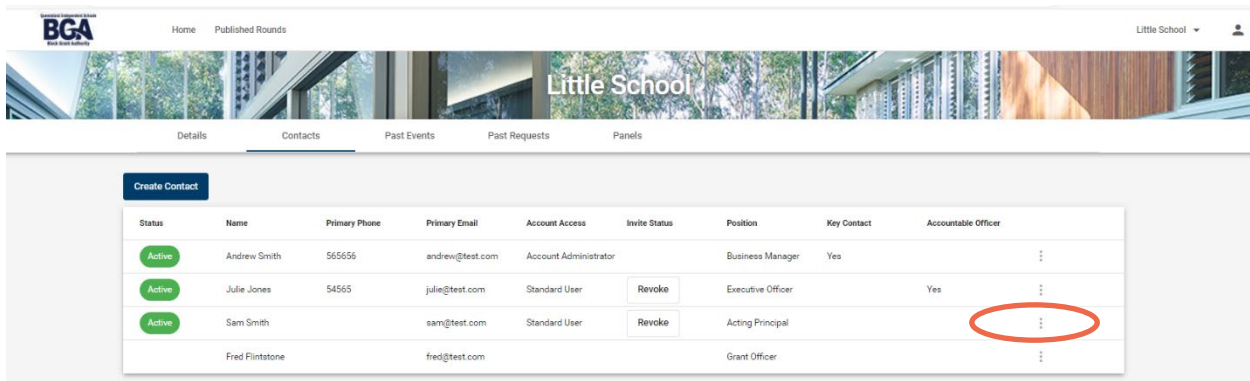
Key Contact

Receives ALL notifications sent by QIS BGA advising of a task to be completed via the Client Portal. There can be only **one** key contact per organisation.

Accountable Officer

Holds overall accountability for the school's participation with QIS BGA as an agent of the Approved Authority. This can be applied to multiple users.

1. Find the user being assigned a specific role and select the morevert (three dots).



2. Access the menu that will allow *Make Key Contact* or *Make Accountable Officer*. The relevant user will not receive a notification but the changes will be immediate.

