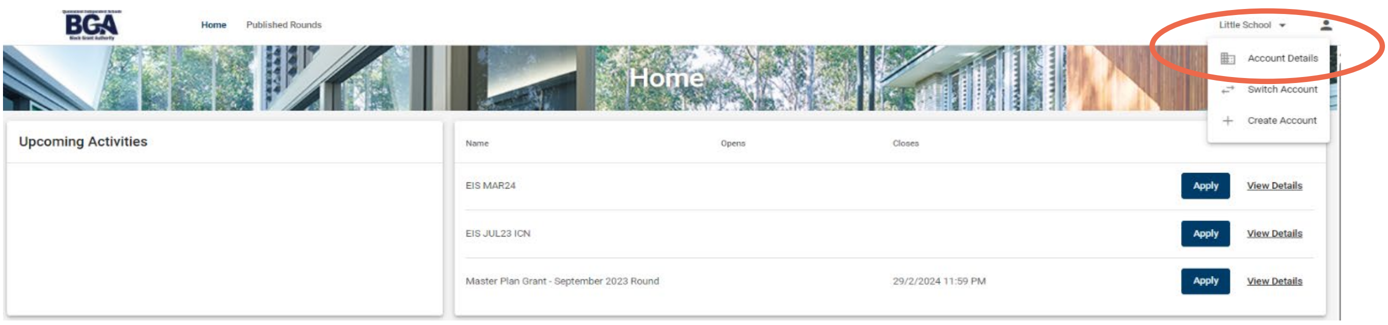
Maintaining Contacts

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

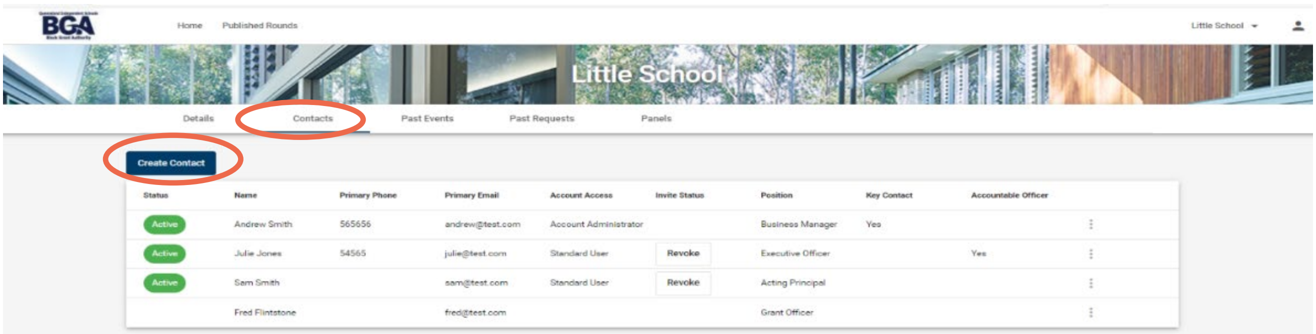
Invite Users to a Business Account

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.

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

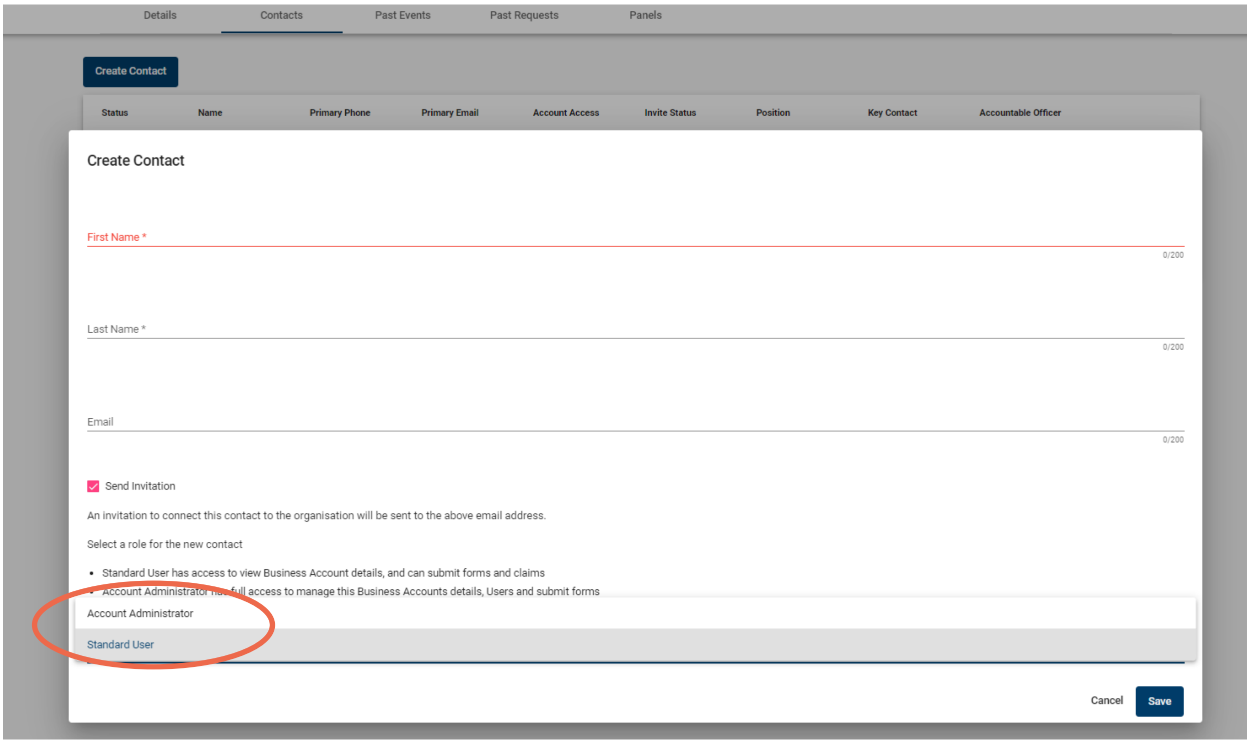


2. From the Contacts tab, select *Create Contact*.

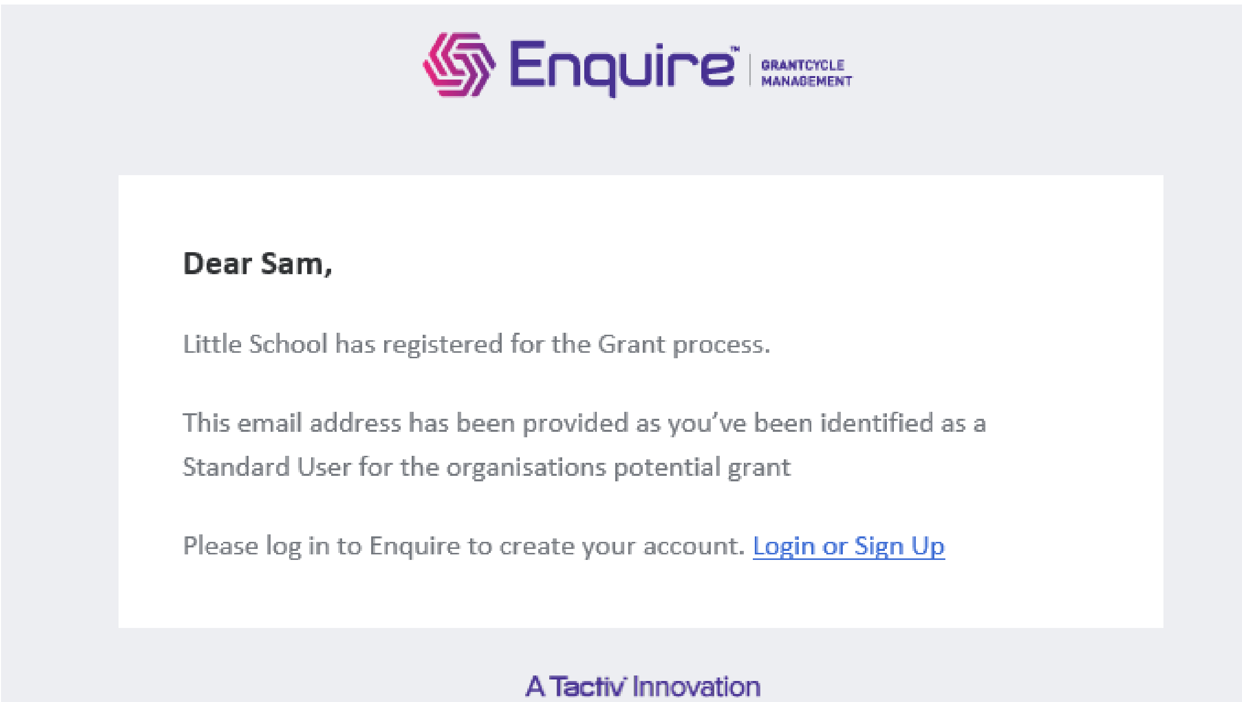


3. Invite a user by completing the contact's details and choose their user access as either Account Administrator or Standard User and select *Save*.

There can be multiple Account Administrators and multiple Standard Users.

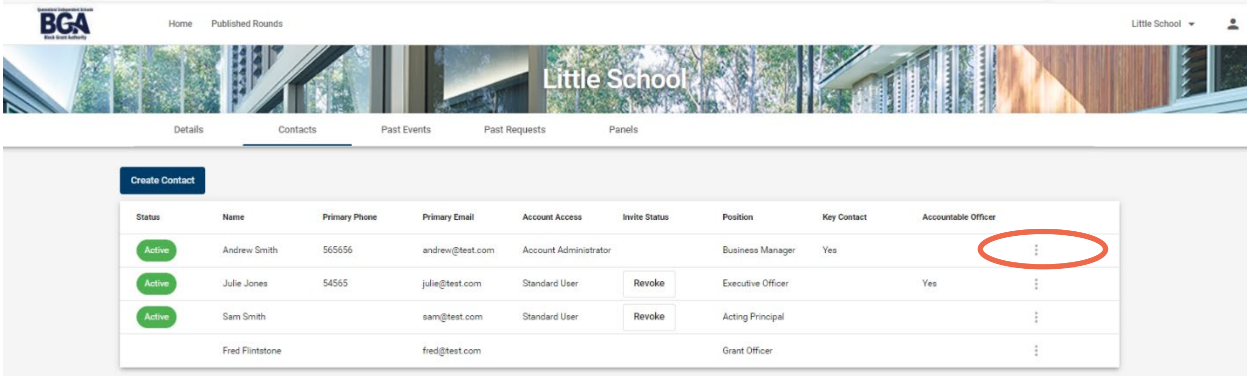


4. An invitation will be sent to the contact allowing access to the Business Account.

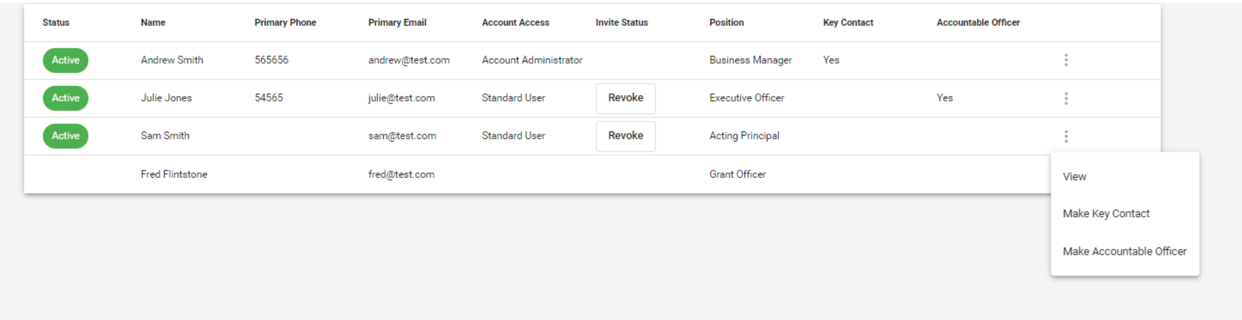


Update contact details

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

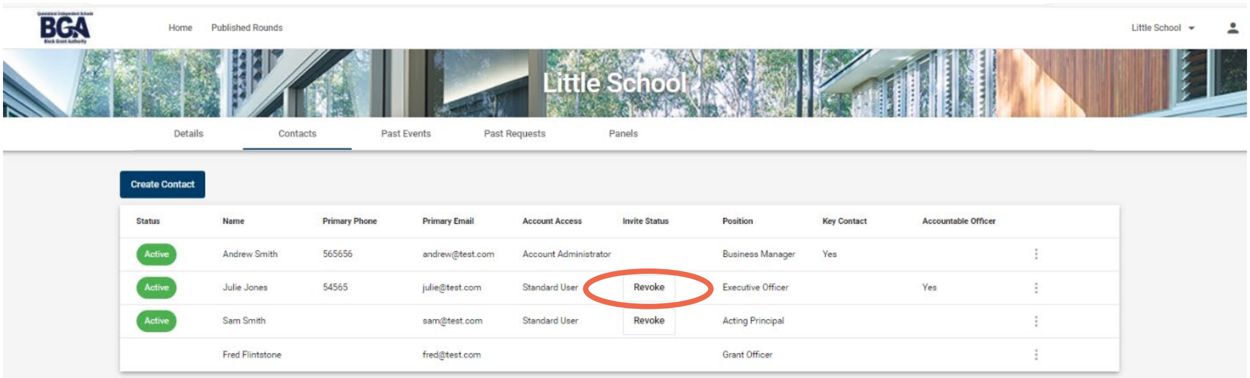


2. Choose *View* and access the menu, allowing details to be edited, and then *Save* the required changes.



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.



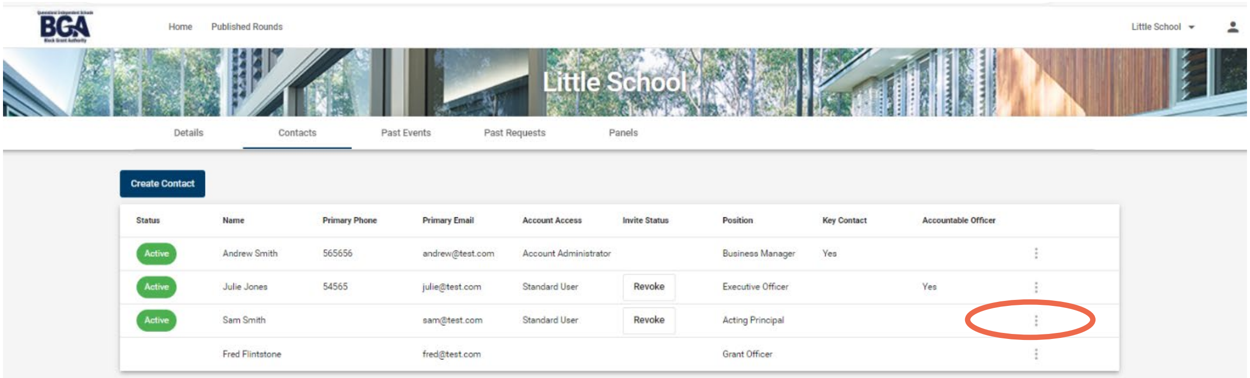
Managing Roles

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.