MYACFID - Primary Contacts

Each member organisation of ACFID will have a staff person within that is assigned as the "Primary Contact". The Primary Contact is the person that will administer the ACFID account. This contact will be granted specific permissions on the member portal.

FAQs

What can a primary contact do within MYACFID?

A primary contact has specific permissions (above other roles in the portal) allowing them to:

1. Update their organisations profile (on behalf on their organisation) – including phone number, website, generic email, preferred contact method, office, and postal address.
2. Add new staff to their organisation and provide them access to MYACFID
3. Remove staff that have left their organisation
4. Register and pay for events on behalf of their organisation
5. Assign specific roles to individuals such as EA contact, survey contact, finance contact, compliance contact, Media contact etc

Can more than 1 person be a Primary Contact?

No. Only one person within an organisation can be assigned this role.

Who do you recommend should be the Primary Contact?

We recommend someone in an administrative position should take the Primary Contact role. Primary Contact in this sense does not mean that you will receive all communications from ACFID, it simply means that you can administer certain things on behalf of your organisation within MYACFID and that we will reach out to you if we have a query about contact details etc

How do we change who our Primary Contact is?

To assign the role of Primary Contact to someone else within your organisation, please contact ACFID via membership@acfid.asn.au and provide the name and email address of who you would like it to be.

Can I be the Primary Contact and hold other roles?

It is preferable if the Primary Contact does not hold any other permissions roles within the portal; however, if it is unavoidable, please contact ACFID so we can ensure your access works correctly.

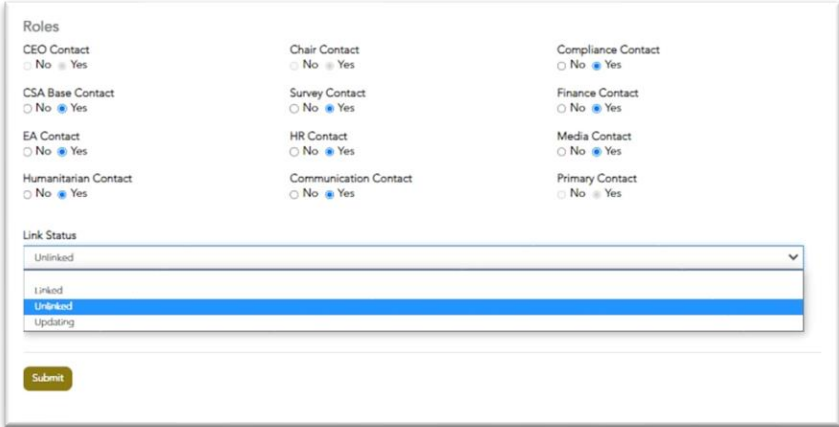## How do I add a new staff member to the portal?

To add a new staff member:

1. Click on your name in the top right corner and select "Organisations contacts" from the list of options.
2. Check to see if the staff member is present within the list.
3. If not, select the "Add contact" button in the top right corner and complete the name and email address sections.
4. If this person holds an additional role, select as appropriate.
5. Click "Submit"

This will automatically send the contact a registration link.

How do I delete a person that is leaving the organisation?

To delete a staff member:

1. Click on your name in the top right corner and select "Organisations contacts" from the list of options.
2. Select the email address of the person that you wish to remove.
3. If they have been assigned a role, such as HR contact, ensure that you set it back to "No"
4. Below the roles there is a section called "Linked Status". Select "Unlinked" then "Submit"

How do I see what roles have been assigned to staff and change roles for staff within my organisation?

There are several allocated roles within the MYACFID Portal. Some of them assign certain privileges to that role, allowing them to do and see different things within the portal. These roles are also recorded in ACFID's CRM, so that we may contact certain role types as required.

These roles (and whether you can change them) are:

Role	What does it do? (in addition to basic user access)	Who can change?
CEO Contact	Approves CSA, receives important communication from ACFID, View and pay organisational invoices	ACFID
Chair Contact	Approves CSA	ACFID
Primary Contact	Administer your organisations account – add and remove staff	ACFID
Survey Contact	More information to follow	Primary Contact
Finance Contact	View and pay organisational invoices	Primary Contact
Compliance Contact	Can submit code reporting and will receive all communications relating to compliance	Primary Contact
CSA Base User	Access to Code reporting	Primary Contact, Compliance Contact
Executive Assistant	For contact purposes only	Primary Contact
Media Contact	For contact purposes only	Primary Contact
HR Contact	For contact purposes only	Primary Contact
Communications Contact	For contact purposes only	Primary Contact

1. Click on your name in the top right corner and select "Organisations contacts" from the list of options.
2. Select the email address of the person that you wish to view if they have a role assigned or change roles for.
3. Using the Yes/No toggles – change roles as required.
4. Click Submit

Can a single person be multiple roles within MYACFID?

Yes they can.

How do we change our CEO/Board Chair?

It's important that you do not modify your outgoing CEO or Board Chair's account in MYACFID. To change your CEO, please delink their profile, then add the new CEO as a contact. This will automatically send them an invitation link to redeem. Once this is done, please contact membership@acfid.asn.au and we will correctly assign them in our CRM.

ACFID will be continuing to make improvements to the MYACFID portal as users interact. If you receive error messages when trying to access elements that you believe you should be able to, or if you have suggestions for improvements, please email crm@acfid.asn.au

Thank you for your patience.