

Main Contact (previously Institutional Representative)

Instructions for Editing and Adding Individuals Under Institutional Membership

Main Contact Responsibilities

Each member organization has **ONE** Main Contact (Formerly titled Institutional Representative). The Main Contact will maintain all the below functions, including:

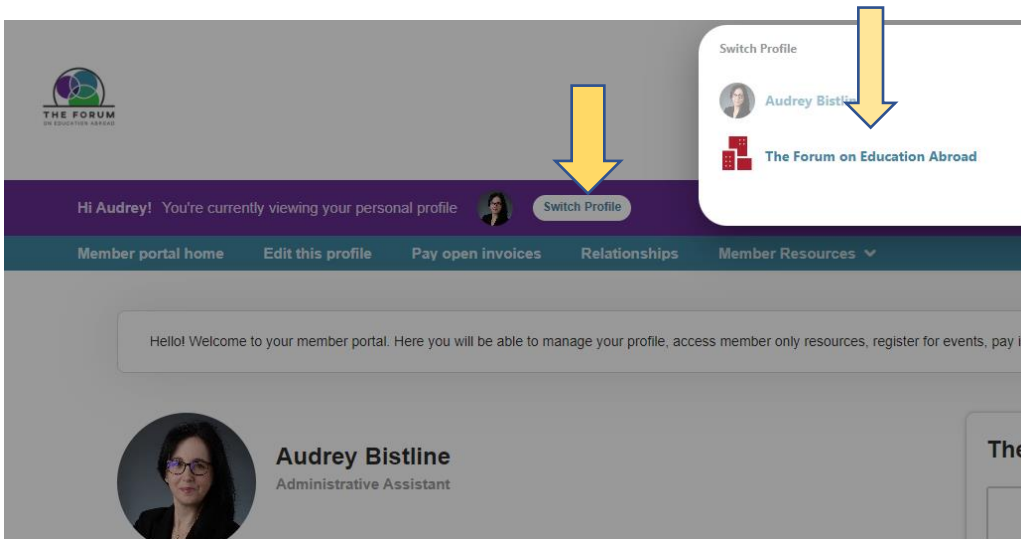
- ❖ serving as the official voting member in Council Elections
- ❖ completing State of The Field Surveys
- ❖ managing the membership
- ❖ receiving all important communications from The Forum on Education President.

Editing and Adding Individuals Under Institutional Membership

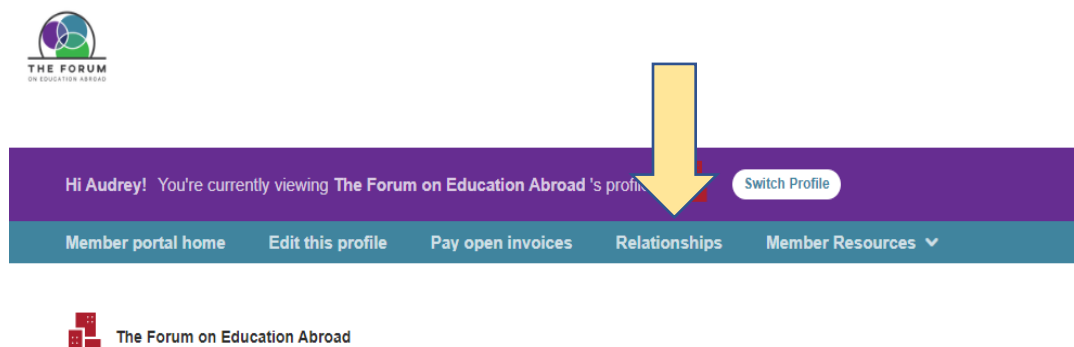
The Forum on Education Abroad Membership is institutional. This means all staff, administrators, and faculty at your institution/organization can access the benefits.

The Main Contact for the membership will manage the contacts under the membership.

- ❖ Log into your profile via this link: <https://web.forumea.org/atlas/portal/profile>
- ❖ Once you are logged in, on the purple toolbar you will see “Switch Profile.” Click this button and select your institution.



- ❖ Then select “Relationships” in the blue toolbar. This will allow you to access all the profiles related to your organization.



On this page you may assign roles to existing profiles under the membership.

***** Related Profile roles**



Main Contact – Only one per institution (usually yourself)

Editor – employee who also can edit the contact list (limit to 2 employees other than yourself)

Receives communication – all employees should receive Forum communication

Billing Contact (Optional)– person in charge of invoices (please note that any employee will be able to make a payment, but this person will receive communication on new and past due invoices)

To edit an existing contact, click on the dropdown “ACTIONS” then click “EDIT” on the corresponding employee’s line.

 Annette Mares-Duran	Member Services Manager	maresdua@forumea.org	<input type="text"/>	Employee	 ACTIONS ▾
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Left side menu tips: (Optional): Typically individuals edit this section on their own.

- General information: To edit the employee information (name, title)
- Additional Address, Phone and email: If applicable
- Social Media: To add a LinkedIn profile.
- Update preferences: For communication preferences in terms of resources, experience level etc.

To remove a former employee from your list: click on “ACTION” then click “DELETE” and “SAVE”.

To add a new employee: click on the blue “ADD PROFILE” button on the right corner. ALWAYS SELECT “INDIVIDUAL PROFILE” and fill in the necessary information.

Related To The Forum on Education Abroad

New-profile

Individual Profile Organization Profile

Prefix

First Name

MI

Last Name

Suffix

E-mail

Main Contact Of The Forum on Education Abroad

Editor Of The Forum on Education Abroad

Receives Communication

Billing Contact

Update phone and address to inherit from The Forum on Education Abroad

Relation Type

Employee

CANCEL SAVE AND CLOSE CONTINUE EDITING

Relation Type	
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS
Employee	ACTIONS

Enter the necessary information. FIRST - LAST NAME and EMAIL should be the minimum information required, with the “Receives communication ”AND “Update phone and address to inherit from...”boxes checked.

If you click on the “CONTINUE EDITING” Button, you can enter extra information if needed.

SAVE and CLOSE when you are done with your update.

***All changes will appear in your portal after The Forum’s team reviews them. Please allow 1-2 business days. **Login information will be sent to new contacts after they have been reviewed.**

***When you are done with managing the contact list, do not forget to **switch back** to your own profile.

IMPORTANT INFORMATION

- ❖ **To avoid any login issue in the future:** we recommend that each person related to an institution uses their **own professional email**. Do not use shared email addresses such as “info@” or “studyabroad@.”
- ❖ To ensure you receive member rates on event, please log into the portal before purchase. You may register multiple individuals from your institution at once, but you must be logged in.
- ❖ **Our system does not allow “shared login”**. Each staff, Faculty must activate their online account with their own personal login and password.