

## **Adding and Deleting Individual Members to your MFTA Account:**

In order to be added to your organization's MFTA account and receive login credentials for making an appointment, please follow the instructions below:

1. Your organization has a designated Primary, who is the head of your organization/agency or the principal of your school. In addition, Account Managers are authorized to add new contacts to your organization's MFTA account. Please reach out to these individuals to be added to your account and request that they follow this link to login:  
<https://www.mfta.org/user/login>.
  - a. **If they do not remember their password**, they can use the password reset option.
2. Once logged in, your Primary or Account Manager should click "Authorized Contacts" to view the organization's current contact list, and select "Add New Contact" at the bottom of the page. There are different statuses, but most full time employees are added as a **Representative**.
3. If there is no designated **Account Manager**, the Primary should add at least one Account Manager—large organizations may choose to have more than one. The Account Manager may be an executive assistant, department head, or assistant principal. The Primary will select "Account Manager" for this person (or people) in the "User Group" option.
4. If you have questions about the different statuses, then please reference the list below.
5. For issues logging in that cannot be resolved with the above information, please send an email to [info@mfta.nyc.gov](mailto:info@mfta.nyc.gov) or call (718) 729-2007.

## **Statuses for MFTA Individual Member Accounts:**

1. **PRIMARY:** The head of an organization or school principal is given the status of "Primary." Primaries generally are the people who sign the MFTA contract. Primaries are able to add and delete employees, manage "Appointment Guests", and edit overall account details.
2. **ACCOUNT MANAGER:** "Account Managers" are able to add and delete Authorized Contacts in the organization's account. "Account Managers" should be employees who regularly connect with several members of their organization, such as an administrative assistant, manager of a department, assistant principal.

There should be at least one Account Manager on every MFTA account—and more for large organizations. Account Managers are able to add individuals to the account and schedule appointments for "Appointment Guests".

**Note:** "Account Managers" making appointments for an "Appointment Guest," may need to use the notes section. You *\*may\** write exceptions in the notes field for example, "This Appointment Guest may bring two people, take durable items, and put items on hold".

3. **REPRESENTATIVES:** “Representative” is the most common status, and is usually given to full-time employees at an organization.

**When making appointments, Primaries, Account Manager and Representatives may bring up to two people with them for a shopping appointment. They can shop for any items in the warehouse—durable items (specialty items) and consumable items (regular items). They may also put durable items on hold.**

4. **APPOINTMENT GUEST:** “Appointment Guests” have some restrictions put on them. “Account Manager” or “Primary” must make an appointment for them, they may only take consumable items, they cannot bring any additional people with them to shop during their shopping appointment, and they cannot put any items on hold unless their organization gives them permission for any of the above. An organization may choose to designate part-time employees, interns, volunteers, or PTA members as “Appointment Guests”.