

How to add or amend a business activity (product classification)

This is a guide to adding or amending a business activity in the member portal.

Administrator contacts can self-manage and update details in the portal. Members must ensure they support their records and keep them up to date.

Information on business activity is necessary for AFCA reporting purposes. It assists in categorising members for enhanced engagement. Externally, the primary business activity is featured in the AFCA Datacube report comparison.

An AFCA member must provide primary and, if needed, secondary business activity information. A member can update their business activity information when:

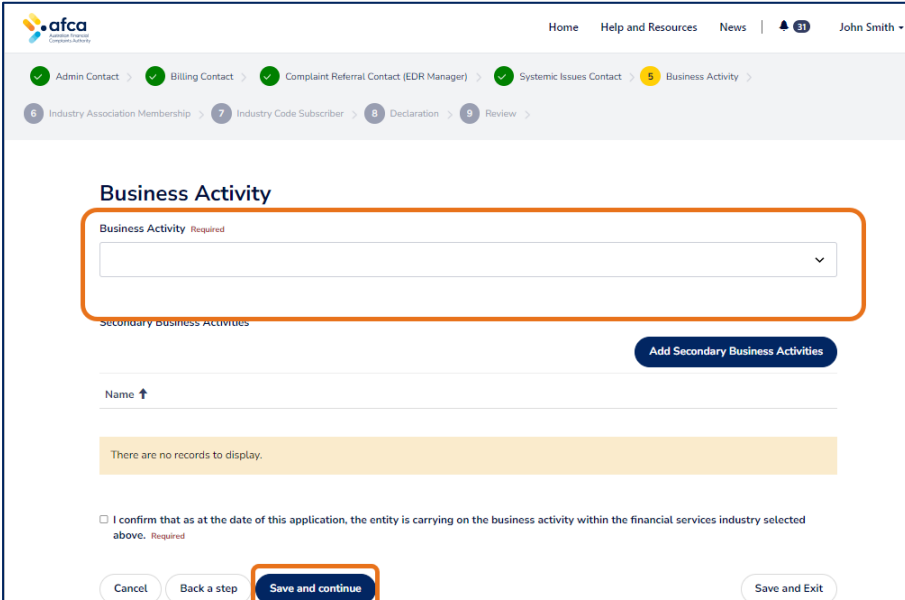
- Applying for a new membership online
- Managing their profile through the member portal

Adding a business activity when applying for a new membership

When applying for a new membership in the member portal, you can add a business activity by following these steps:

1. Log in to the member portal.
2. Click on the **Primary Business Activity** tab.

3. Select all the business activity for your organisation from the drop-down list.
Click **Save and continue**.

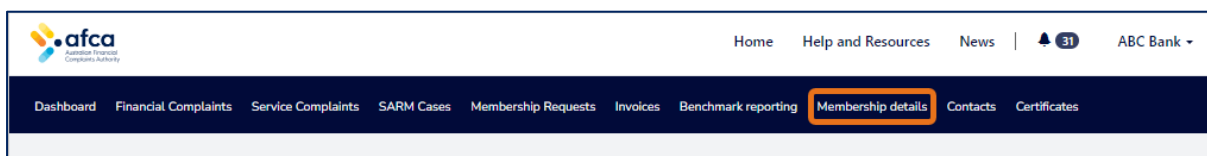


The screenshot shows the AFCA member portal interface. At the top, there is a navigation bar with the AFCA logo, user name 'John Smith', and links for Home, Help and Resources, and News. Below this is a progress indicator showing steps 1 through 9, with 'Business Activity' highlighted as the current step. The main content area is titled 'Business Activity' and features a required dropdown menu for selecting a business activity. Below this is a section for 'Secondary business Activities' with an 'Add Secondary Business Activities' button and a table with a 'Name' column. A message states 'There are no records to display.' At the bottom, there is a confirmation checkbox: 'I confirm that as at the date of this application, the entity is carrying on the business activity within the financial services industry selected above.' Below the checkbox are four buttons: 'Cancel', 'Back a step', 'Save and continue' (highlighted with an orange box), and 'Save and Exit'.

Amending or updating a business activity

You can amend a business activity by following these steps:

1. Log in to the member portal.
2. Click on the **Membership details** tab.



3. Scroll down to Business Activities.

4. You can only select one **primary business activity**. If you are also involved in other financial activities, you can add **secondary business activities** below.

Business Activities

Primary Business Activity

Bank ✕ 🔍

Secondary Business Activities

Add

Name ↑

There are no records to display.

5. Click **Submit** to update.