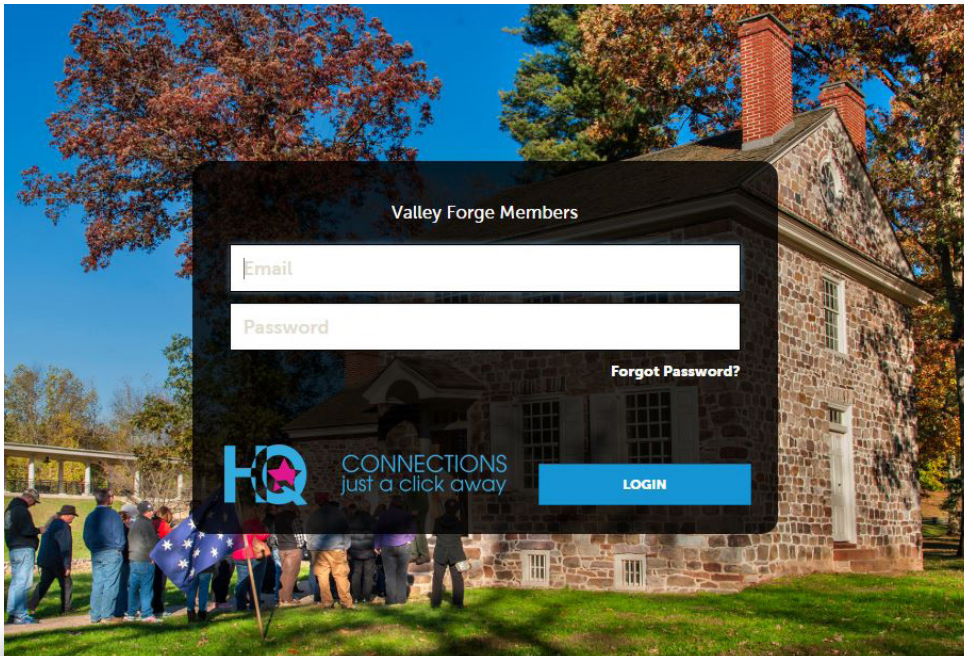


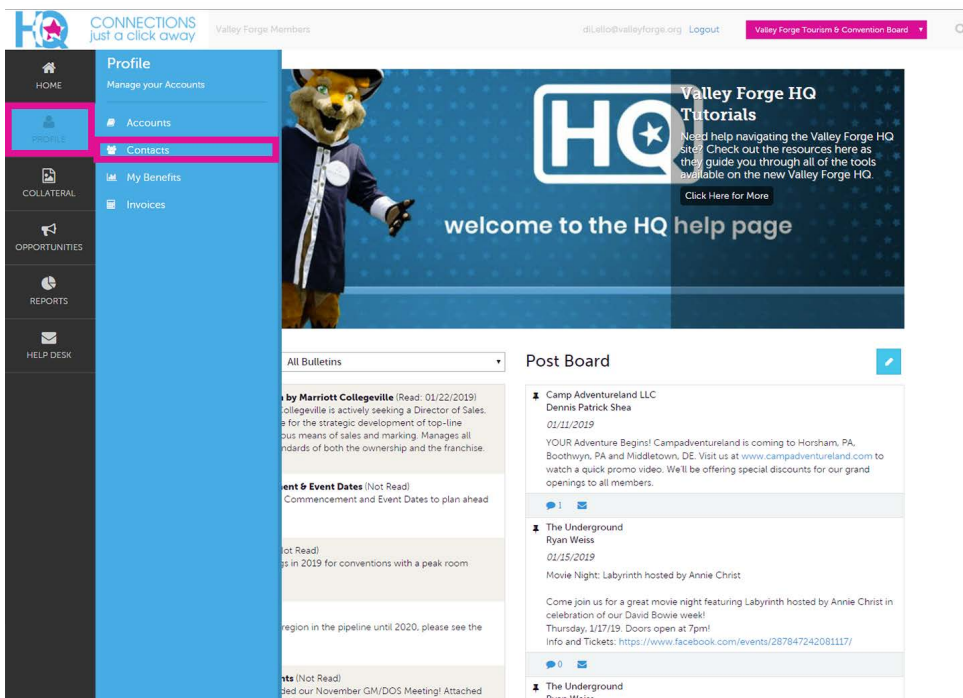
HQ HOW TO

Updating & Adding Contacts in HQ

1. Log into HQ at valleyforge.org/hq.



2. Once on the home page, Click Profile then Contacts.



HQ HOW TO

Updating & Adding Contacts in HQ

3. To add a **New Contact**, Click **Add Contact**.

The screenshot shows the 'Contacts' page in the HQ system. On the left is a sidebar with navigation links: HOME, PROFILE, COLLATERAL, OPPORTUNITIES, REPORTS, and HELP DESK. The main content area has a header with 'Valley Forge Members', 'monty@valleyforge.org', 'Logout', and a dropdown menu for 'Valley Forge Tourism & Convention Board'. Below the header is a 'Filters (0)' section with dropdowns for 'Account is one of:' and 'Contact Type is one of:', an 'APPLY FILTERS' button, and a 'Manage Filters' link. A red 'ADD CONTACT' button is visible. Below it is a table of contacts with columns: Actions, Full Name, Account, Title, Email, and Contact Type. The table lists seven contacts, including Caitlin Hoppel, Debbie Repas, Katie Otto, Kelsey Barry, Marc Kaminetsky, Megan Tomlinson, and Monty Fox.

Actions	Full Name	Account	Title	Email	Contact Type
	Caitlin Hoppel	Valley Forge Tourism & Convention Board	Business Intelligence Analyst	hoppe@valleyforge.org	Secondary
	Debbie Repas	Valley Forge Tourism & Convention Board	Membership Sales Manager	repas@valleyforge.org	Secondary
	Katie Otto	Valley Forge Tourism & Convention Board	Event Services & Membership Coordinator	otto@valleyforge.org	Secondary
	Kelsey Barry	Valley Forge Tourism & Convention Board	Sales Coordinator	barry@valleyforge.org	Secondary
	Marc Kaminetsky	Valley Forge Tourism & Convention Board	Director of Convention & Tourism Sales	kaminetsky@valleyforge.org	Primary
	Megan Tomlinson	Valley Forge Tourism & Convention Board	Director of Event Services and Membership	tomlinson@valleyforge.org	Primary
	Monty Fox	Valley Forge Tourism & Convention Board	Ambassador	monty@valleyforge.org	Primary

4. Create **New Contact**.

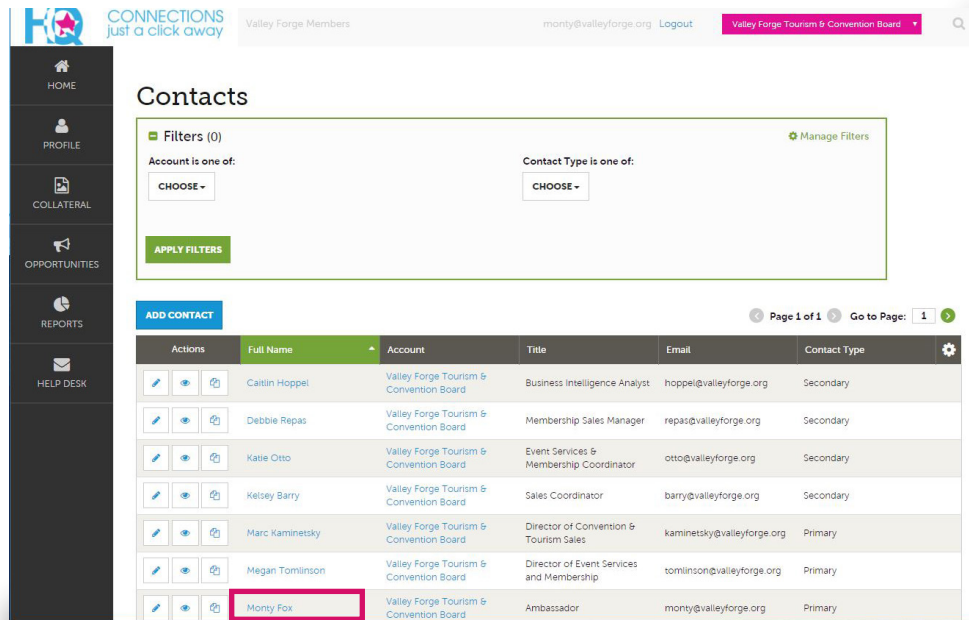
The screenshot shows the 'New Contact' form in the HQ system. The left sidebar is the same as in the previous screenshot. The main content area has a header with 'Valley Forge Members', 'monty@valleyforge.org', 'Logout', and a dropdown menu for 'Valley Forge Tourism & Convention Board'. Below the header is a 'Sections:' list with 'Contact Information', 'Address Information', and 'Phone Information'. The 'Contact Information' section is active and contains fields for 'Account' (dropdown), 'First Name', 'Last Name', 'Full Name', 'Department', 'Title', 'Contact Type' (dropdown, highlighted with a red box), and 'Email'. There is also a 'Send Email' section with 'YES' and 'NO' radio buttons. The 'Address Information' section is partially visible at the bottom, showing a 'Physical Address' field.

1. Be sure to fill in all required fields.
2. When choosing a **Contact Type**, the **primary** contact would be the VFTCB's main point of contact with your organization. **Secondary** would be assigned to all other contacts, unless there is a separate individual who would handle billing.
3. **Inactive** status is used when an individual is no longer with your organization.
4. Hit **Yes** under **Send Email** to receive our email communications and event invitations.
5. Hit **Save** to finish.

HQ HOW TO

Updating & Adding Contacts in HQ

5. To Update a Contact, return to the **Contacts** page.



Contacts

Filters (0) Manage Filters






















Account is one of: CHOOSE -

Contact Type is one of: CHOOSE -

APPLY FILTERS

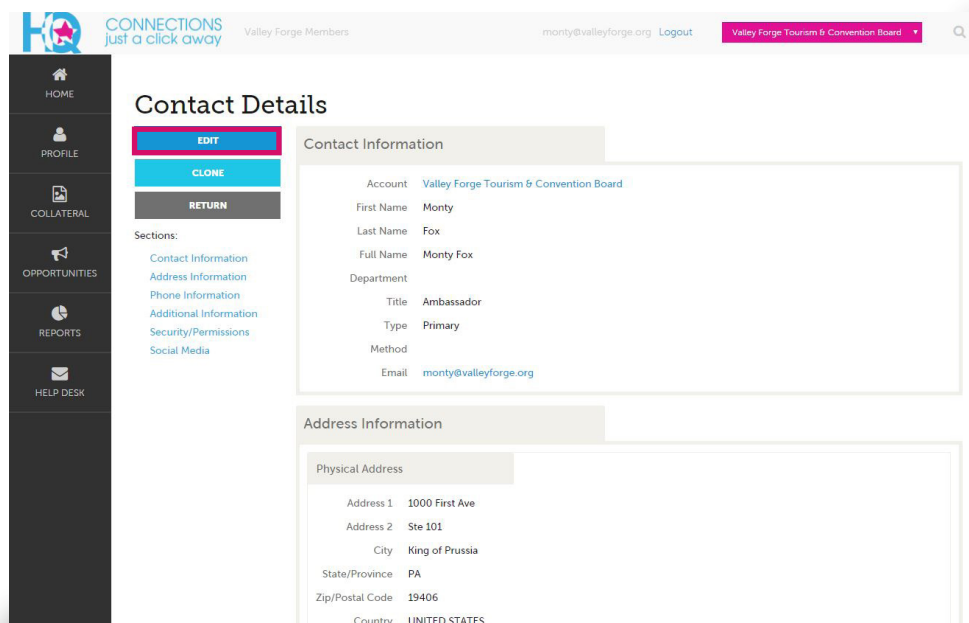
ADD CONTACT

Page 1 of 1 Go to Page: 1

Actions	Full Name	Account	Title	Email	Contact Type
  	Caitlin Hoppel	Valley Forge Tourism & Convention Board	Business Intelligence Analyst	hoppe@valleyforge.org	Secondary
  	Debbie Repas	Valley Forge Tourism & Convention Board	Membership Sales Manager	repas@valleyforge.org	Secondary
  	Katie Otto	Valley Forge Tourism & Convention Board	Event Services & Membership Coordinator	otto@valleyforge.org	Secondary
  	Kelsey Barry	Valley Forge Tourism & Convention Board	Sales Coordinator	barry@valleyforge.org	Secondary
  	Marc Kaminetsky	Valley Forge Tourism & Convention Board	Director of Convention & Tourism Sales	kaminetsky@valleyforge.org	Primary
  	Megan Tomlinson	Valley Forge Tourism & Convention Board	Director of Event Services and Membership	tomlinson@valleyforge.org	Primary
  	Monty Fox	Valley Forge Tourism & Convention Board	Ambassador	monty@valleyforge.org	Primary

- Select the Name of the Contact that you would like to update.

6. Select **Edit** to make any updates.



Contact Details

EDIT

CLONE

RETURN

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- Security/Permissions
- Social Media

Contact Information

Account Valley Forge Tourism & Convention Board

First Name Monty

Last Name Fox

Full Name Monty Fox

Department

Title Ambassador

Type Primary

Method

Email monty@valleyforge.org

Address Information

Physical Address

Address 1 1000 First Ave

Address 2 Ste 101

City King of Prussia

State/Province PA

Zip/Postal Code 19406

Country UNITED STATES

HQ HOW TO

Updating & Adding Contacts in HQ

7. Complete any updates to the contact.

- If the contact is no longer with your organization, please mark them as **Inactive** under **Contact Type**. Hit **Save** to finish.

IMPORTANT NOTE: Please **DO NOT** save over an old contact. If a new employee is filling the role of someone who has left, create a new contact and put the old contact as inactive. This is helpful for continuity of communication between the VFTCB and the new contact.