



HOW TO

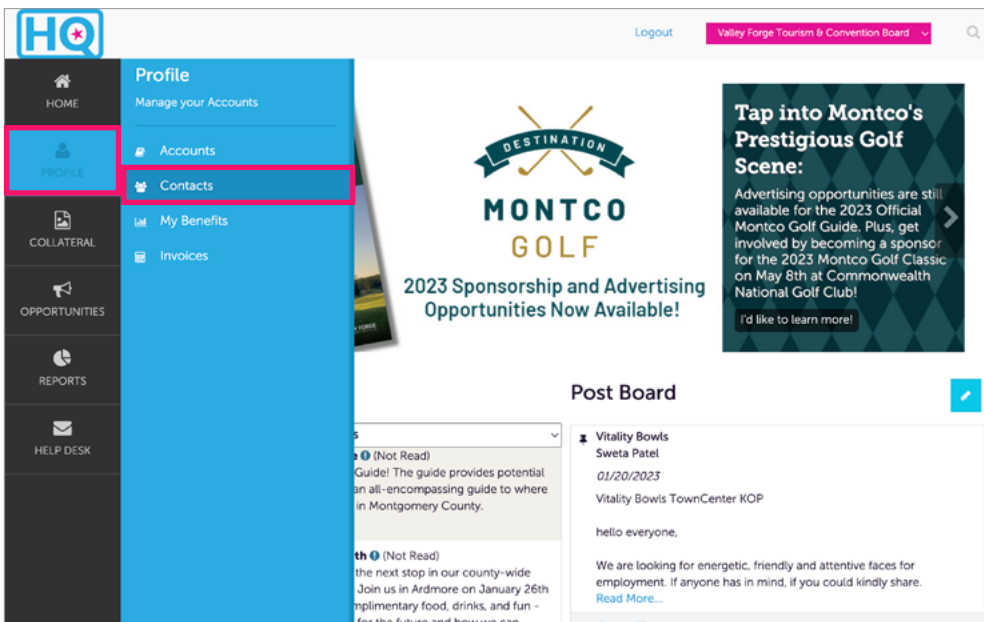
Updating & Adding Contacts

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



- Bookmark this page for easy access! For assistance with accessing your login information please email cramer@valleyforge.org.

2. Once on the home page, **click Profile** then **Contacts**





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

Actions	Full Name	Account	Title	Email	Contact Type
	Aja Cramer	Valley Forge Tourism & Convention Board	Membership Sales Manager	ajacramer@gmail.com	Primary
	Brandi Gordon	Valley Forge Tourism & Convention Board		brandi.gordon@simpleviewinc.com	Primary
	Maureen DiLello	Valley Forge Tourism & Convention Board		diLello@valleyforge.org	Inactive
	Jessica Boerman	Valley Forge Tourism & Convention Board		jessica.boerman@simpleviewinc.com	Primary
	Marc Kaminetsky	Valley Forge Tourism & Convention Board	Director of Convention & Tourism Sales	kaminetsky@valleyforge.org	Inactive

4. Create **New Contact**

Sections:

- Contact Information
- Address Information
- Phone Information
- Social Media
- General

Contact Information

Account: Required Valley Forge Tourism & Convention Board

Last Name: Required

First Name: Required

Full Name: Required

Department:

Title:

Contact Type: Required --Choose One--

Email: Required

Send Email:

☐ YES ☐ NO

Address Information

Physical Address

1. Be sure to complete all fields, being as detailed as possible.
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.



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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
Edit View Add	Aja Cramer	Valley Forge Tourism & Convention Board	Membership Sales Manager	ajacramer@gmail.com	Primary
Edit View Add	Brandi Gordon	Valley Forge Tourism & Convention Board		brandi.gordon@simpleviewinc.com	Primary
Edit View Add	Maureen DiLello	Valley Forge Tourism & Convention Board		diLello@valleyforge.org	Inactive
Edit View Add	Jessica Boerman	Valley Forge Tourism & Convention Board		jessica.boerman@simpleviewinc.com	Primary
Edit View Add	Marc Kaminetsky	Valley Forge Tourism & Convention Board	Director of Convention & Tourism Sales	kaminetsky@valleyforge.org	Inactive
Edit View Add	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
- Social Media
- General

Contact Information

Account: Valley Forge Tourism & Convention Board

First Name: Monty

Last Name: Fox

Full Name: Monty Fox

Department:

Title: Ambassador

Type: Primary

Email: monty@valleyforge.org

Address Information

Physical Address

Address 1: 1000 First Ave

Address 2: Ste 101

City: King of Prussia

State/Province: PA



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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.

For help, contact:

Aja Cramer

Membership Sales Manager
cramer@valleyforge.org

Tyler Gebhard

Events and Services Coordinator
gebhard@valleyforge.org