



**Member Extranet
Member Record**

<http://www.valleyforge.org/extranet>

**Valley Forge Convention and Visitors Bureau
1000 First Ave., Suite 101
King of Prussia, PA 19406
www.valleyforge.org**

Section II - Member Record

You can view four items under your Member Record:

1. Contacts
2. Listings (on www.valleyforge.org)
3. Web – Media (Pictures and Logos)
4. Amenities

Section II.1 - Contacts

1. To update your contact records, click the “Edit” / **Pencil Icon** to the left of the appropriate contact.
2. To add a new Contact, click on the “**Add New Contact**” button on the right side above the contact listing.
3. You can also “clone” a contact by clicking on the **Double Window Icon** link to the left of a current contact (this will make a duplicate of that contact), then change the information that needs to be updated (name, e-mail, phone number, etc.).

ValleyForge - CRM

Welcome, Test Test - Logged in to: Valley Forge Convention and Visitors Bureau

Logout

Leads Member Record Occupancy Service Requests

ACCOUNT DETAIL: VALLEY FORGE CONVENTION AND VISITORS BUREAU

Account Information

Account ID: 15104	Status: Active
Account: Valley Forge Convention and Visitors Bureau	Region: Montgomery
Account (sort): Valley Forge Convention and Visitors Bureau	Email: info@valleyforge.org
Parent:	Web Site: http://www.valleyforge.org
Formerly:	

Phone/Fax Numbers

Primary: 610.834.1550	Alternate:
Tollfree: 888.847.4883	Fax: 610.834.0202

Address Information

Physical Address	Billing Address	Shipping Address
1000 First Ave Ste 101 King of Prussia, PA 19406 UNITED STATES	1000 First Ave Ste 101 King of Prussia, PA 19406 UNITED STATES	1000 First Avenue Suite 101 King of Prussia, PA 19406 UNITED STATES

Additional Fields

MemberRSVP

General

Omit from map? Yes

Contacts Listings Web Amenities

Add New Contact

Filters: --Any Type--

Action	Contact ID	Contact Name	Title	Email	Phone	Type
	6575	David Bradley	DOCS	bradley@valleyforge.org	610.834.1550	Primary
	6976	Mark Zimmerman	Senior Vice President	zimmerman@valleyforge.org	610.834.1550	Primary

4. When adding a new contact, please fill in all available fields. Fields in **RED** will be required.

5. When updating or adding accounts, please select the appropriate “Contact Type” for that individual. (See blowout)

- **Primary** – Owner or General Manager
- **Secondary** – General Manager or Director of Sales.
- **Tertiary** – Sales manager or other key employees.
- **Billing** – Accounts payable contact for membership due invoicing.
- **Inactive** – Any contact that no longer works for the property / venue.

6. Select the appropriate “**Extranet Access**” for the individual (making changes to member records, responding to Meeting Sales or Tourism Sales Leads, viewing Service Request, etc.)

- Hold down **Ctrl** and right click to select multiple access rights.

7. Make sure to click “**Save**” once you’ve filled out all of the fields.

- Save & New Contact will save the contact information and open up a new blank screen to add an additional contact.

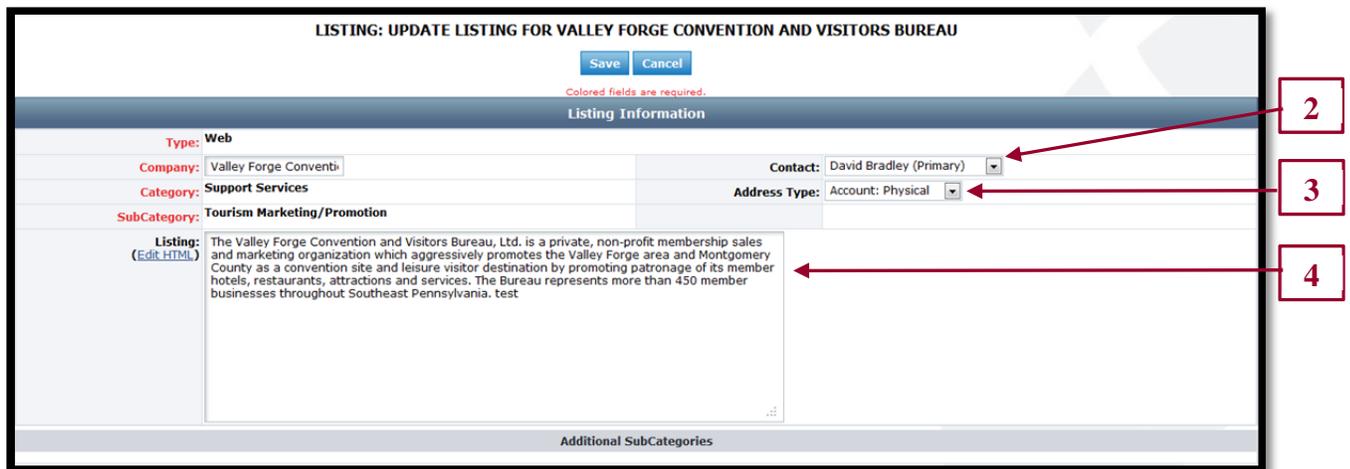
Section II.2 - Listings

Edit a Listing

1. To update your website listing, click the “Edit” / **Pencil Icon** to the left of the appropriate listing under the Listing tab.



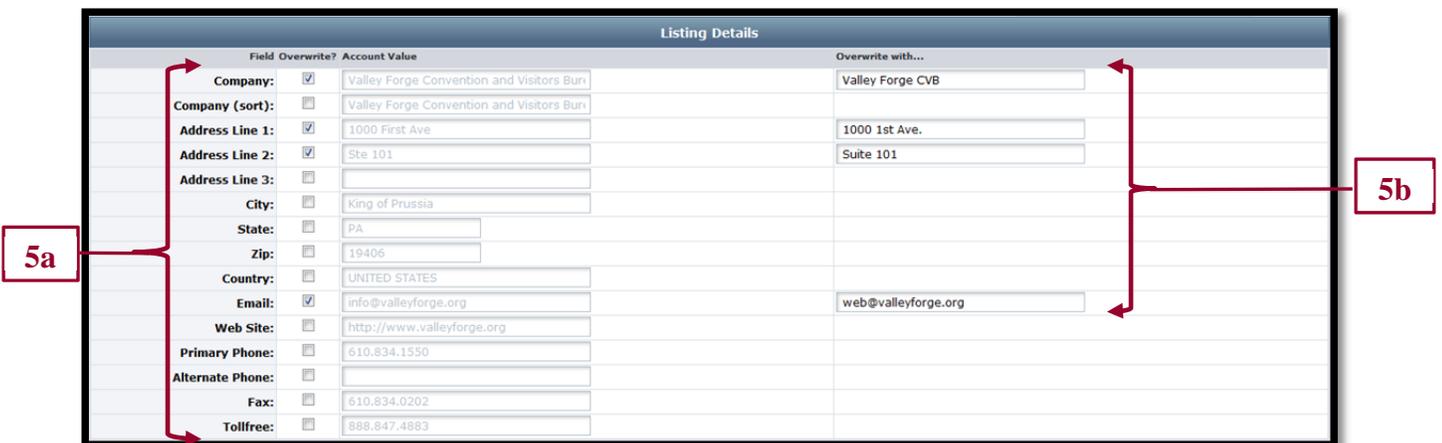
2. **Contact:** Main contact of your listing.
3. **Address Type:** Select “Physical” to display the main address of your account.
4. **Listing:** Enter the description for your venue. There is a 400 character limitation.



A screenshot of the 'UPDATE LISTING FOR VALLEY FORGE CONVENTION AND VISITORS BUREAU' form. The form is titled 'Listing Information' and contains several fields. Red arrows point from numbered callouts (2, 3, 4) to specific fields: 2 points to the 'Contact' dropdown, 3 points to the 'Address Type' dropdown, and 4 points to the 'Listing' text area. The 'Listing' field contains a long text description of the Valley Forge Convention and Visitors Bureau.

Additional SubCategories

5. **Listing Details:** Information on the left will pull in from your Account Detail (a). By checking on the “Overwrite” box, you may replace it with alternate text to display on www.valleyforge.org (b).



A screenshot of the 'Listing Details' form. The form is divided into two columns: 'Field Overwrite?' and 'Account Value'. The 'Field Overwrite?' column contains a list of fields with checkboxes. The 'Account Value' column contains the corresponding values. Red arrows point from numbered callouts (5a, 5b) to specific fields: 5a points to the 'Company' field, and 5b points to the 'Address Line 1' field. The 'Company' field has a checked checkbox and the value 'Valley Forge Convention and Visitors Bure...'. The 'Address Line 1' field has a checked checkbox and the value '1000 1st Ave.'.

Field Overwrite?	Account Value	Overwrite with...
Company: <input checked="" type="checkbox"/>	Valley Forge Convention and Visitors Bure...	Valley Forge CVB
Company (sort): <input type="checkbox"/>	Valley Forge Convention and Visitors Bure...	
Address Line 1: <input checked="" type="checkbox"/>	1000 1st Ave	1000 1st Ave.
Address Line 2: <input checked="" type="checkbox"/>	Ste 101	Suite 101
Address Line 3: <input type="checkbox"/>		
City: <input type="checkbox"/>	King of Prussia	
State: <input type="checkbox"/>	PA	
Zip: <input type="checkbox"/>	19406	
Country: <input type="checkbox"/>	UNITED STATES	
Email: <input checked="" type="checkbox"/>	info@valleyforge.org	web@valleyforge.org
Web Site: <input type="checkbox"/>	http://www.valleyforge.org	
Primary Phone: <input type="checkbox"/>	610.834.1550	
Alternate Phone: <input type="checkbox"/>		
Fax: <input type="checkbox"/>	610.834.0202	
Tollfree: <input type="checkbox"/>	888.847.4883	

6. **Website Notifications:** Enter any email addresses to be notified when the website listing reaches a designated number of hits (number of times it has been viewed).
7. Make sure to click “Save” once you’ve filled out all of the fields.

8. All updates will be placed in a ****Pending Approval**** status until the updates have been approved by the Valley Forge CVB. The updated listing will display on www.valleyforge.org once it has been approved.

Action	Listing ID	Type	Category	SubCategory	Listing
	15104	Web	Support Services	Tourism Marketing/Promotion	The Valley Forge Convention and Visitors Bureau, Ltd. is a private, non-profit membership sales and marketing organization which aggressively promotes the Valley Forge area and Montgomery County as a

9. Pending changes have been approved when the icon next to the “edit” icon is greyed out. If the icon is still blue and yellow, approval is still pending.

Section II.3 - Web

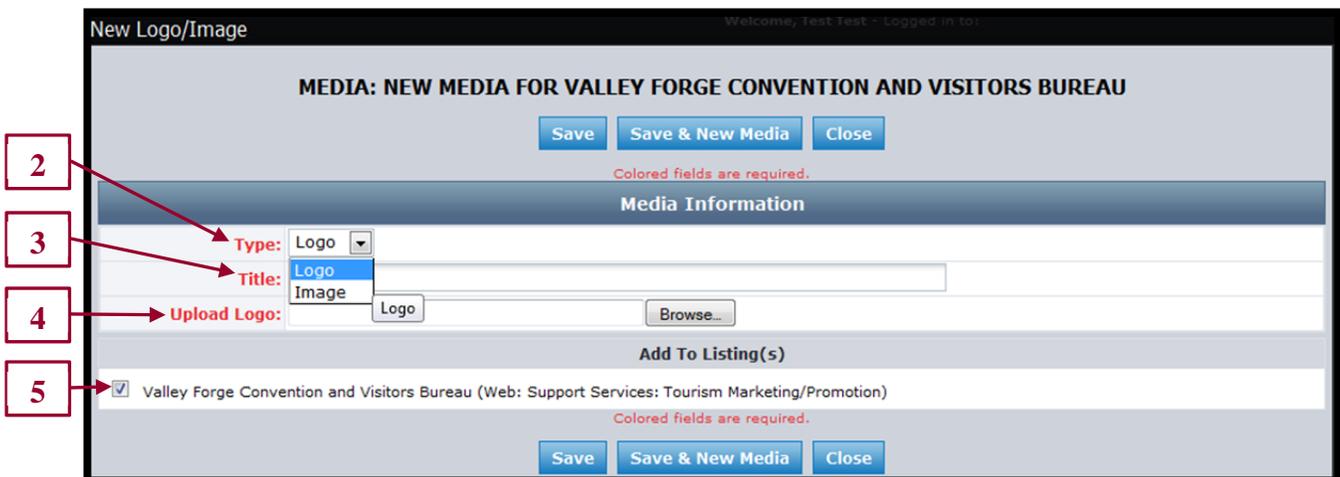
Media – Logos and Pictures

To attach an image to your listing(s), click on the **Web** tab and then the **Media** sub-tab. If you have any images already uploaded, you will see them there. To add new images

1. Click on the “New Logo/Image” button on the right hand side of the screen.

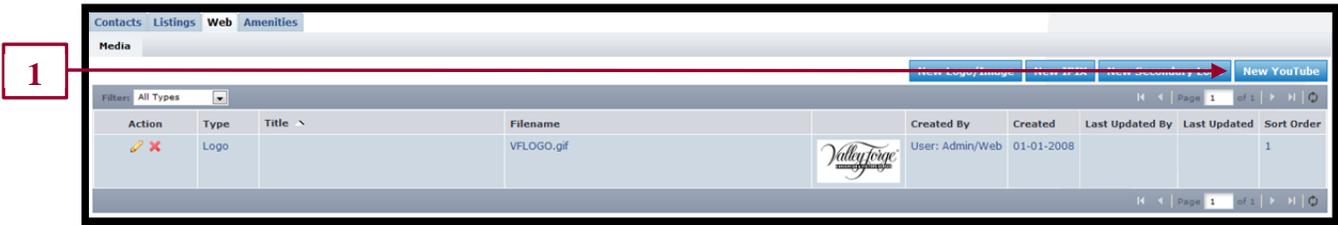


2. For your main image, choose “**Logo**” under Type and for secondary choose “**Image**” for the Type.
3. Enter a Title of the image you are uploading.
4. Browse to find the file on your PC (make sure files are RGB, under 1MB in size and either a jpg or png type).
5. Check the box to the left of the listings that you would like the image to appear on.
6. Click Save to save the to your account.



YouTube Video

1. You can also add a YouTube video to your listing within the Media tab by clicking on the “New YouTube” button.



2. Add a Title for your video
3. Copy the link of your YouTube video and paste it onto the YouTube Link.
4. Check the box for the online listings where you wish to have the video shown.
5. Click “Save” to save the information to your account.

The screenshot shows the 'New YouTube' form. At the top, it says 'MEDIA: NEW MEDIA FOR VALLEY FORGE CONVENTION AND VISITORS BUREAU'. Below this are three buttons: 'Save', 'Save & New Media', and 'Close'. A red message says 'Colored fields are required.' Below this is a section titled 'Media Information' with a blue header. It contains three fields: 'Type: YouTube', 'Title: [text input]', and 'YouTube Link: [text input]'. Below this is a section titled 'Add To Listing(s)' with a blue header. It contains a checkbox that is checked, with the text 'Valley Forge Convention and Visitors Bureau (Web: Support Services: Tourism Marketing/Promotion)'. A red message says 'Colored fields are required.' Below this are three buttons: 'Save', 'Save & New Media', and 'Close'. Three red boxes with numbers 2, 3, and 4 are on the left, with arrows pointing to the 'Title', 'YouTube Link', and the listing checkbox respectively.

Section II.4 - Amenities

1. Each member can update their amenity information as they see fit. This information can be viewed on the Valley Forge CVB website & may be included in print materials.
2. There are sub-tabs under this section that you can use to promote your property / venue. Select the appropriate sub-tab under Amenities (General or Meeting Facilities).
3. Click “Edit Amenities” to update.
4. Select or Edit the appropriate amenities fields as it relates to your property / venue.

General

General information about your property / venue can be updated in this section.

Meeting Facilities

The Meeting Facilities sub-tab is used to update our facilities’ specification sheets for marketing purpose and to populate our online venue search.