

## Module Preview: Managing Contact Information

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Site Manager gives you complete control over managing your organization and contact information. The COLLABORATIVE function includes an Organization page to update your collaborative name, phone and fax numbers, mailing address, street address, and Website main title and tag line; and a Contacts page to update coordinator and chair contact information.

The best part is that the information you enter into the Contacts page feeds directly into the Family Connection collaborative search page on the Family Connection Partnership Web site. This means that when your collaborative Web site is complete, no more e-mail blasts are necessary to notify everyone when your phone number or address changes. It also means coordinators are now responsible for updating collaborative contact information via Site Manager. Please be sure to keep the Contacts page current.

### Module Objectives

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Upon completion of this module,  
You will master the skills necessary to:

- A. Change the organizational information
- B. Change coordinator contact information
- C. Change chair contact information

### Tips

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Make a habit of checking your contact information in Site Manager at the end of each month. This information populates the collaborative contact database, which is linked to CIMS, evaluation, and reporting, and is used to communicate throughout the Family Connection network.

## Exercise A: Change the Organizational Information

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### Step by Step

1. From Site Manager, under COLLABORATIVE, click Organization

### Additional Information

Utilities page opens (Figure 1.1)

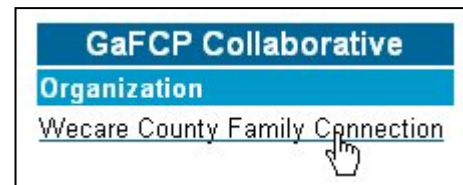


Figure 1.1 Utilities – Organization

2. On Utilities page, click Your Organization's Name
3. To change the collaborative name, click in the **Collaborative Name** text box to type changes (Figure 1.2.1)
4. To change the e-mail, phone, extension, or fax, click in the **eMail, Phone, Extension, or Fax** text boxes, to type changes (Figure 1.2.2)
5. To change the mailing address, click in the **Mailing Address** text boxes to type changes (Figure 1.2.3)
6. To change the street address, click in the **Street Address** text boxes to type changes (Figure 1.2.4)
7. To change the title of your Web site and/or its tag line, click in the **Website Main Title** and **Website Tag Line** text boxes to type changes (Figure 1.2.5)
8. At the bottom of the screen, click **Update** to save changes

Collaborative Detail page opens (Figure 1.2 on next page)

This information displays in the public view on the Home Page, in the Contact Info section

Use the coordinator's e-mail, phone, extension, and fax in these fields

This displays in the public view on the Home Page, in the Contact Info section

If the street address is the same as the mailing address, leave the **Street Address** text boxes blank

If the tag or title is too long to fit on one line, enter <BR> to force a line break. These characters will show in Site Manager but not in public view. For example: Wecare County Family Connection Collaborative <BR> in Partnership with Communities in Schools

Check the public view of your Web site to see your changes

Change the Organizational Information, Continued

Collaborative Detail

① **Collaborative Name**

**County**

**Region**

② **eMail**

**Phone**

**Extension**

**Fax**

③ **Mailing Address**

**City**

**State**

**Zip Code**

④ **Street Address**

if different than mailing address

**City**

**State**

**Zip Code**

⑤ **Website Main Title**

**Website Tag Line**

**Website Directory**

**User ID**

**Password**

**Primary Website**

**Secondary Website**

Figure 1.2 Collaborative Details

## Exercise B: Change Coordinator Contact Information

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### Step by Step

1. From Site Manager, under COLLABORATIVE, click Contacts

### Additional Information

Collaborative Contacts page opens (Figure 1.3)



Collaborative Contacts				
First Name	Last Name	eMail	Title	Type
Naja	Williamson	naja@wecare.org	Chair	Collaborative Chair
Laurie	Searle	laurie@wecare.org	Executive Director	Coordinator

Figure 1.3 Collaborative Contacts - Select Coordinator

2. Click the Coordinator's Last Name  
Collaborative Contact Details page opens (Figure 1.4 on next page)
3. Click in the **Start Date** text box and type your correct start date  
The information is not updated until you click **Submit**
4. To make any other changes, click the appropriate text box to type changes  
The information is not updated until you click **Submit**
5. To prevent the e-mail address, phone number, or fax number from displaying on the Home page, uncheck their associated check boxes  
The e-mail address, phone number, and fax number are typically checked for the coordinator so they display on the Home Page, and frequently unchecked for the Chair (see next exercise)
6. At the bottom of the screen, click **Submit** to save changes  
Check the public view of your Web site to see your changes

## Change Coordinator Contact Information, Continued

Collaborative Contact Details	
<b>Collaborative Name</b>	Wecare County Family Connection
<b>Contact Type</b>	Coordinator
<b>Contact Title</b>	Executive Director
<b>First Name</b>	Laurie
<b>Last Name</b>	Searle
<b>Coordinator Start Date</b>	April 7 2003
<small>Enter month/year (00/0000)</small>	
<b>Show eMail</b>	<input checked="" type="checkbox"/>
<b>Show Fax</b>	<input checked="" type="checkbox"/>
Addresses: please enter mailing address & enter street address if physical location is different.	
<b>Coordinators:</b> To update your address information, please click on Organization found on the left hand navigation.	
<b>Mailing Address</b>	<b>Street Address</b>
P.O. Box 1300	4455 Sunnyside Lane
<b>City</b> Somewhere	<b>City</b> Somewhere
<b>State</b> GA	<b>State</b> GA
<b>Zip Code</b> 30303	<b>Zip Code</b> 30303
<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

Figure 1.4 Collaborative Contact Details - Coordinator

**Note:** The coordinator's e-mail address, phone, extension, fax, mailing address, and street address are in "display only" format on the COLLABORATIVE>Contacts coordinator page, because they are considered the organization's contact information. To change these fields, go to COLLABORATIVE>Organization.

## Exercise C: Change Chair Contact Information

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### Step by Step

1. From Site Manager, under COLLABORATIVE, click Contacts

### Additional Information

Collaborative Contacts page opens (Figure 1.5)



Collaborative Contacts				
First Name	Last Name	eMail	Title	Type
Naja	Williamson	naja@wecare.org	Chair	Collaborative Chair
Laurie	Searle	laurie@wecare.org	Executive Director	Coordinator

Figure 1.5 Collaborative Contacts – Select Chair

2. Click the Chair's Last Name  
Collaborative Contact Details page opens (Figure 1.6 on next page)
3. Click in the **eMail** text box and type the correct e-mail address  
The information is not updated until you click **Submit**
4. To make any other changes, click the appropriate text box to type changes  
The information is not updated until you click **Submit**
5. To prevent the e-mail address, phone number, or fax number from displaying on the Home page, uncheck their associated check boxes  
The e-mail address, phone number, and fax number are typically checked for the coordinator so they display on the Home Page, and frequently unchecked for the Chair
6. At the bottom of the screen, click **Submit** to save changes  
Check the public view of your Web site to see your changes

## Change Collaborative Chair Contact Information, Continued

Collaborative Contact Details	
<b>Collaborative Name</b>	Wecare County Family Connection
<b>Contact Type</b>	Collaborative Chair
<b>Contact Title</b>	Chair
<b>First Name</b>	Naja
<b>Last Name</b>	Williamson
<b>Coordinator</b>	
<b>Start Date</b>	<input type="text"/>
Enter month/year (00/0000)	
<b>Show eMail</b>	<input type="checkbox"/>
<b>Show Fax</b>	<input type="checkbox"/>
<b>Organization Name</b>	Sunnyside Farms
if different than collaborative	
<b>eMail</b>	naja@gafcp.org
<b>Phone</b>	404-527-7394
<b>Extension</b>	123
<b>Fax</b>	770-123-4555
<b>Show Phone</b>	<input type="checkbox"/>
Addresses: please enter mailing address & enter street address if physical location is different.	
<b>Mailing Address</b>	P.O. Box 1234
<b>Street Address</b>	5544 Cherry Tree Lane
<b>City</b>	Palmetto
<b>City</b>	Somewhere
<b>State</b>	GA
<b>State</b>	GA
<b>Zip Code</b>	30200
<b>Zip Code</b>	30303

Figure 1.6 Collaborative Contact Details - Chair

**Note:** The chair's mailing address and street address are not considered the organization's addresses, so they are updated on this page. These addresses do not display on the public view, but they display on the Family Connection collaborative search page on the Family Connection Partnership Web site. The chair contact information is also saved to the contact database Family Connection Partnership uses for mailings.

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