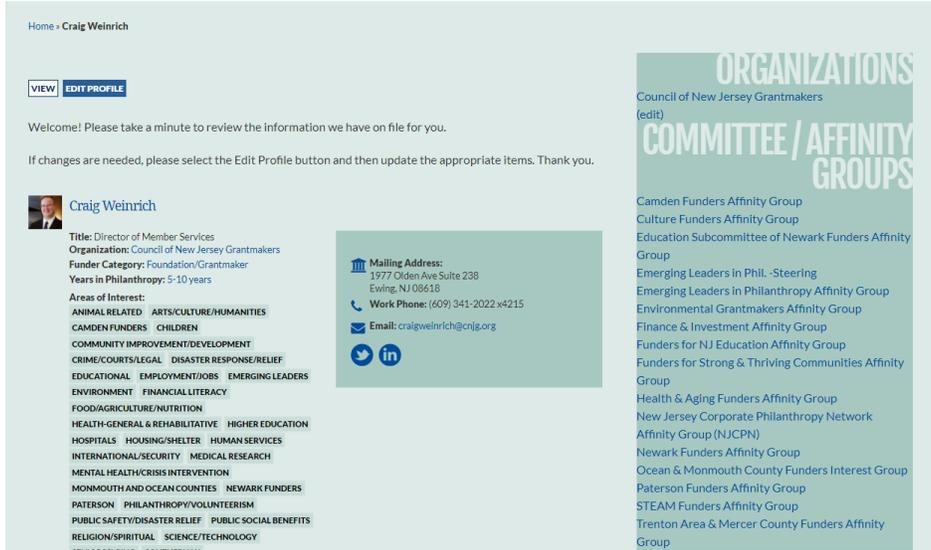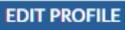# CNJG Website Tutorial – Part 2:
Update your Personal/Organization Profile

After you login, you will see your member profile. If you do not see it, click on **ACCOUNT**:

If you need to make changes, click the **EDIT PROFILE** button. Here, you can:

- **Change your password**
- **Subscribe/unsubscribe from CNJG emails**
- **Edit your profile, making it easier for colleagues to find you**
- **Upload a picture of yourself. (Files must be less than 3 MB. Allowed file types: png, gif, jpg, jpeg. Images must be smaller than 1000x750 pixels)**

Some guidance on the profile fields:

- *Reminder: this section is password protected. Only CNJG members can see your profile*
- **Any fields with a red Asterisk are required**
- **Mail Preference** - Click on the blank box for drop-down menu to select which type(s) of communication information/newsletters you want to receive by mail and/or email
- **Organization Name (Update)** - If the name of your organization has dramatically changed from what is listed, please update it here *(please note: all organization name changes will need approval by CNJG staff; this change will not be immediate upon saving)*
- **Twitter/LinkedIn** – Enter your personal account, not your organization's
- **Areas of Interest** - Click on the blank box for the drop-down menu and select any/all of the areas that you are interested in/responsible for/fund
- **Include in Member Directory** – If you do not want your information available to other members, uncheck this box. This will not affect others from your organization being able to register you for a program.

After you have made all changes, scroll to the bottom of the page and click **SAVE CONTACT**

Click on **VIEW** to see what other members will see.

If you have the Administrative Contact role for CNJG, at your organization, you will see the organization name in the right column, under Committee/Affinity Groups. *Contact CNJG staff to add/edit who has this role for your organization and see below for definitions of CNJG role.*

To edit the organization information, click (edit)

You now can edit your company's profile information:

The fields here are similar to the personal profile fields, but these are for the organization.

- *Reminder: the online directory is restricted to members only. Only CNJG members will see all of this information, should you choose to list your organization in the member directory.*
- **To change the name of the organization, please contact Craig Weinrich at craigweinrich@cnjg.org or (609) 414-7110 x802. You cannot change the organization name or funder category on your own.**
- **Funding Areas - Click on the blank box for the drop-down menu and select any/all of the areas that your organization funds.**
- **Twitter/LinkedIn/Blog – Enter your organization's account, not your personal account.**
- **Staff Size Range – Please use Full Time Equivalents (FTE) to calculate your staff size. (ie. Two part-time employees = 1 FTE). Do not include consultants in this calculation. Corporations should indicate the staff in your CSR department, not the entire company.**
- **Please base your grant data on the most recent fiscal year, including Assets, Total Annual Grants, Number of Grants Made, Types of Support, and Geographic Funding Areas.**
- **Include in Member Directory – If you do not want your information available to other members, uncheck this box.**

After you have made your edits, scroll to the bottom and click **SAVE ORGANIZATION**

Next, you can add/delete contact affiliated with your organization. Click on **CONTACTS** and you'll see a list of the contacts CNJG has in its database for the organization:

ORGANIZATION CONTACTS

ORGANIZATION **CONTACTS**

ADD CONTACT

Name	Active	Role for CNJG	Role for Organization	Edit
Active Member	☑	Administrative Contact 2		Edit
Mary J. Trimbach	☑		Consultant	Edit
Kari Williams	☑		Finance	Edit
Craig Weinrich	☑	Administrative Contact	Senior Management	Edit
Theresa E. Jacks	☑		Senior Management	Edit
Kevin Callaghan	☑			Edit
Anna D'Elia	☑			Edit
Maria Vizcarrondo	☑	Primary Contact	CEO	Edit
Ilene Cutroneo	☑	Billing Contact	Administrative	Edit

SAVE

INSTRUCTIONS

This lists all of the members of your Organization.

To Add a member, click on **Add Contact**.

To Edit a member, click on **Edit** next to their name.

To Delete a member, *uncheck* the **Active** box. Please make sure to select **Save** at the bottom when deleting members.

Up to two contacts per organization can have an Administrative Contact Role for CNJG, meaning they can edit the organization information and add/edit contacts. To edit any contact's "Role for CNJG," click "edit" to the right of the individual's name. See below for all of the CNJG role definitions.

To add a new contact, click **ADD CONTACT**

Enter in the new contact's information, including the role at the organization, by clicking on **Choose some options** You can have more than one role.

- Any fields with a **red Asterisk** are required
- These are the same fields on your personal profile. Complete as much as possible. The contact, once he/she logins to the CNJG website can then edit their own profile.

After you have entered in the required data, scroll to the bottom of the page and click **SAVE CONNECTION**

To edit a contact's information, click Edit to the right of his/her name. On this new screen, you can now add/edit/delete the contact's information and their "Organization role" for that individual.

CRAIG WEINRICH

☑ AFFILIATION STATUS
      Uncheck if affiliation is no longer active.

ORGANIZATION ROLE
☑ ADMINISTRATIVE CONTACT
☐ ADMINISTRATIVE CONTACT 2
☐ BILLING CONTACT
☐ BILLING CONTACT 2
☐ PRIMARY CONTACT
Select the roles this contact has in this organization.

FIRST NAME *
Craig
If you need to make changes to this field, please contact us for assistance.

MIDDLE NAME

LAST NAME *
Weinrich
If you need to make changes to this field, please contact us for assistance.

Click "SAVE" after any changes are made, and you will brought back to the list of Organization Contacts.

To delete a contact, uncheck the Active Box. Please select **SAVE** at the bottom of the page when deleting contacts.

<u>CNJG Role Definitions</u>

There are several kinds of interactions any organization manages with CNJG.

- The Primary Contact is the face of an organization with CNJG. Most often this is a CEO or ED. Sometimes it's the head of a corporate foundation's philanthropy or giving department
- The Billing Contact is the person who receives membership renewal invoices. Your organization can designate up to two Billing Contacts.
- The Administrative Contact is the person who is designated to maintain the organization's information on our Member Directory. Your organization can designate up to two Administrative Contacts

These CNJG roles can be performed by separate people or a single person can assume multiple roles, whichever works best for you. You see these designations on the Organization Contacts table. You can re-assign these designations by editing the contact.

>>Next>> Part 3: Using the Member Directory