

Managing Your Member Organization's Account Profile on DVG.ORG

Directions for DVG Member Primary Representatives

Please follow these steps to verify and/or update your member account information.

STEP 1: SIGN IN

- Go to www.dvg.org and click on the **Sign In** link at the top of the homepage under the DVG logo.
- Enter your organization's username and password where indicated, and click the Sign In button.
 - ✓ Since you will have a separate login combination for your personal profile, we recommend you NOT check the *Remember Me* box.

If you have any problems logging-in with your assigned username and password, contact Matt Smith at matt@dvg.org or 215-790-9700 x13.

STEP 2: ACCESS YOUR PROFILE

- Once signed in, locate the green **My Profile** box at the top right of the page
- Click on the second link for Manage Profile

STEP 3: UPDATE YOUR ORGANIZATION'S INFORMATION


Under the first section for **Information & Settings**, click on **Edit Bio**, which will take you to the screen: **Edit My Member Profile**

1. Account Information
 - Update/change your username/password, if desired.
 - Verify that the name and email address for the primary representative for your organization is correct; make changes if necessary/desired.
2. Additional Information
 - Use the More Information field to enter any relevant information on your grantmaking that might be of interest to your fellow DVG members (e.g. your mission, a description of a special funding initiative, etc.)
 - You may enter an Alternate Email contact for your member account (such as info@member.org).
3. Organization Information
 - Verify your organizational details, such as address, phone, etc.
 - Update/add any missing profile data for your organization regarding funding areas, annual grants, etc.

Note: Fields that have a red asterisk () are required – your changes will not be saved unless all required fields are completed. Fields with checked boxes indicate that they are visible to other members who view the profile; you can hide certain information by unchecking the boxes.*

When you have finished, be sure to click the SAVE CHANGES button at the bottom of the page.

STEP 4: VERIFY YOUR AFFILIATED STAFF, BOARD and/or TRUSTEES

- In the green **My Profile** box at the top right of the page, click on Manage Profile
- Under the first section for Information & Settings, click on **Sub-Accounts** where you will see a list of the people who are affiliated with your member organization.
- To REMOVE a person who is no longer affiliated with your organization/company, click the red circle with the X --  -- next to his/her name to **Suspend** his/her account. NOTE: Do not choose the option to 'Detach' the person as this will only disaffiliate him/her with your organization, but keep their DVG membership activated.
- To ADD a new colleague, add his/her email address in the text box under **Invite New Members** and click the **Send Invite** button. You will see a confirmation immediately indicating that your invitation was sent. The recipient will receive an email inviting him/her to register, that reads:

*(YOUR ORGANIZATION) has invited you to join the **Delaware Valley Grantmakers** community. If you would like to accept this invitation, use the link below:
[link inserted here]*

- This link will go to a **How to Register** page, which offers the option to register online or contact the DVG staff directly. The invitation is valid for 7 days.

NOTE: If you prefer, you can always email names and contact information of any new staff/trustees to matt@dvg.org and we will input them into our system.

QUESTIONS?

If you encounter any problems or require assistance, please contact Amy Seasholtz at amy@dvg.org or 215-790-9700 x2.

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