

ONLINE UPDATE STEP-BY-STEP INSTRUCTIONS



STEP 1: ACCESSING ONLINE UPDATE TOOL

Visit the SERVICE PROVIDERS page on the 211 website; www.211scc.org/add.htm

Click the login link.

STEP 2: LOG IN

Enter username and login

STEP 3: UPDATE CONTACT INFORMATION

Enter, confirm, or update, the contact information for the person completing the update. We will contact this person should we have any questions about the online update.

STEP 4: UPDATE AGENCY/SITE/SERVICE INFORMATION

If you have multiple locations/sites it's important to select from the drop down the location you are updating. Selecting the correct location is important especially when adding a new service.

As shown below. The left portion of the screen will show information currently listed for your organization. Click the edit button, enter new/correct information then click save.

The screenshot displays a web interface for managing location data. On the left, under 'Section 1 - Location', there are two entries. The first entry is 'UNITED WAY SILICON VALLEY MAIN OFFICE' with an 'edit...' button. The second entry is '1900 The Alameda, San Jose, CA 95148, Santa Clara County' with an 'edit...' button. A modal dialog box titled 'Edit Location Name' is open, showing a text input field containing 'UNITED WAY SILICON VALLEY COMMUNITY CENTER' and three buttons: 'cancel', 'Save', and 'Delete'. A callout box on the right says 'Saved data will appear on the right portion of the screen'. A blue arrow points from the 'Existing Data Side' box to the left column, and another blue arrow points from the 'Saved data' box to the right column.

Click the view details link for each section to expand view and make edits



Each section contains different sets of information. Continue to edit each section until you have updated all sections.

- Section 1 - Location: Information regarding access to the agency (physical location, phone, web, etc.)
- Section 2 - Contact & Business Info: Contact information, funding, building accessibility for handicap, funding sources, and nonprofit status. Contact information is for internal use only and is not accessible to the public.
- Section 3 – Additional Information: Agency overview, hours, site hours (i.e. staff on site at 8am but office is not open until 9am), directions, public transportation accessibility.

Everything listed after Section 3 will be programs/services. Please expand and review/edit each program, also be sure to include Service Contacts if there is a dedicated phone number used to access a service.

To add a new program/service, simply click the link below section 3 “add a new service for this location” and fill in the blanks. Again, it is very important that you have selected the correct location when adding a new service (if you have more than one location).

STEP 5: DONE

When finished, click the button most appropriate for your actions.

- Save Page: this button will only appear at the bottom of the page if you have made changes
- Cancel: select this if you have not made any changes and need to come back to this page
- No Changes: select if you’ve reviewed all information and do not need to make any edits

For questions, or further technical assistance please contact us at (408) 345-4380 or by email at database@211scc.org.