MANAGE YOUR ACCOUNT

Q: How do I login?
When you enter INteract for the first time, you must click on "New user/Retrieve your password" link to set your password. Please enter your email address associated with your CPCU Society membership and click the "Send Password Link".

Q: How do I recover my password?
If you have forgotten your password, click on the "New user/Retrieve your password", enter your email address, and click on "Send Password Link".
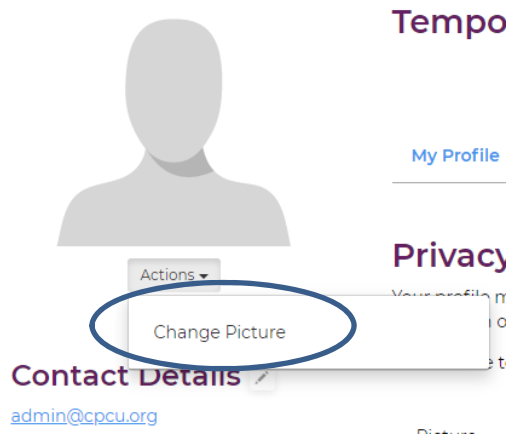
Q: *How do I update my contact information?*
From the INteract home page, click on "My Profile" in the main top menu.   Here you can add/edit all of your information including your bio, education/job history, social profiles and picture!

Q: *How do I add a picture to my profile?*
To add a picture, click on the "Actions" button under the grey silhouette on the left side of your profile.

## Q: *How do I control what information is visible?*
From your profile, click on "My Account" and select "Privacy Settings". There you can decide which parts of your profile are visible to the public, members only, your contacts, or just you.

After you've selected your preferences, click the "Save Changes" button at the bottom of the page.
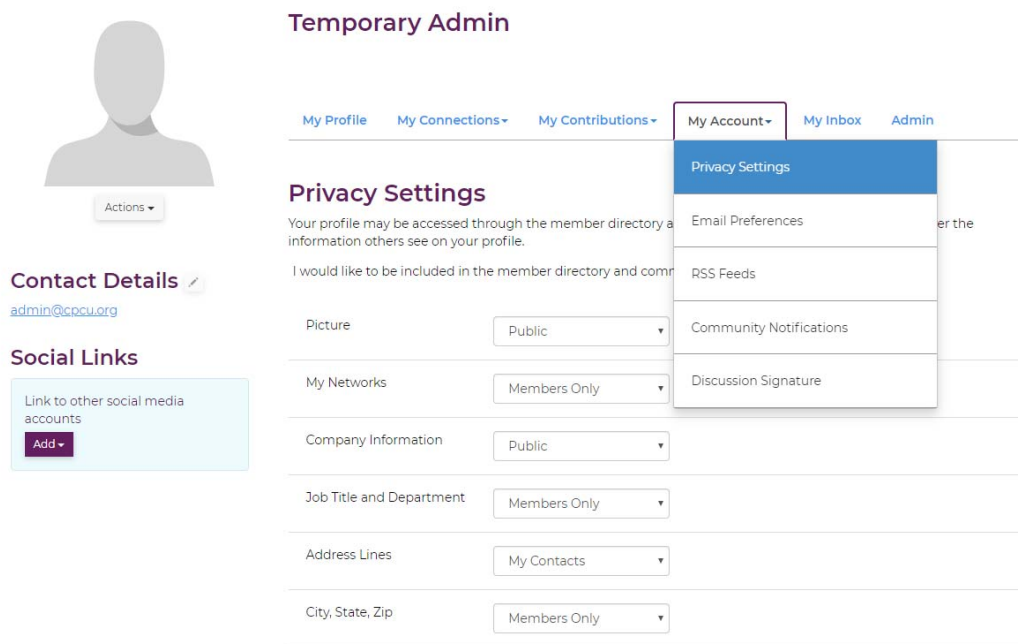
Q: Can I opt out of the member directory/community rosters?
Yes, you can opt out of both at the top of the "Privacy Settings" page. You can still post and interact with communities but you will not appear in the directory.
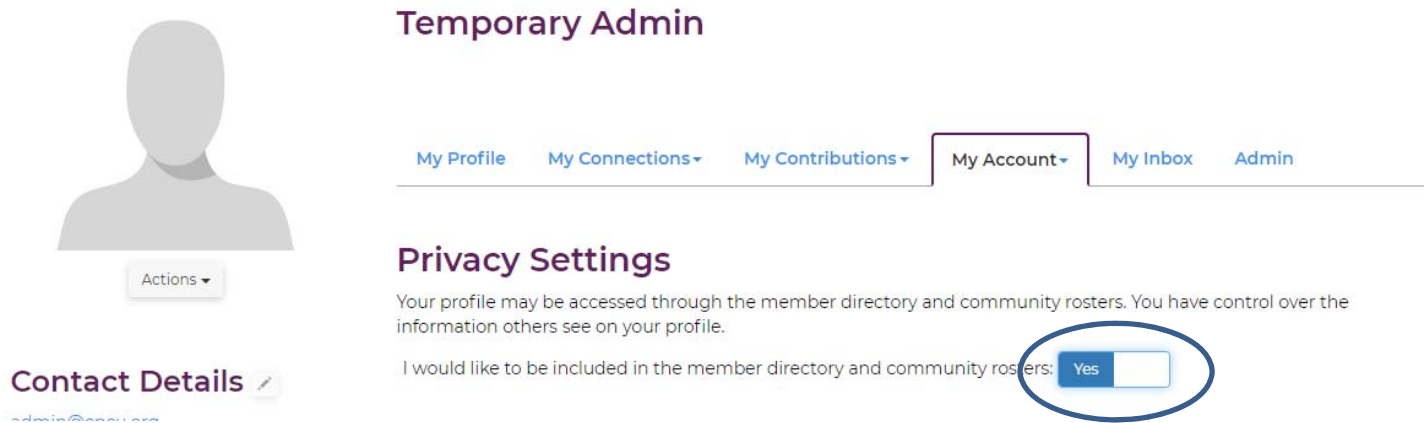
Q: How do I set email preferences?
To change email preferences, go to "My Profile" > "My Account" > "Email Preferences". By default, all emails listed will always be sent to your INteract inbox. However, you can choose to opt out of receiving them to your email address on file by selecting "No" next to the email type.

Q: How do I change the information showing up in my signature block?
To make changes to your signature block navigate to "My Profile" > "My Account" > "Discussion Signature". You can add, delete or reorganize the fields that show up in your signature by clicking the variables on the right-hand side of the screen. Please note that the content of these fields is pulled directly from your CPCU Society membership profile, so all updates must be made on your account at www.cpcusociety.org.

CONNECT

Q: How do I find other members?
Click on "Directory" from the main blue navigation bar. The directory lets you search for other members based on basic information such as name or email address. Use the "Advanced Search" option if you would like to search for members by location.

Q: How do I add contacts to my contact list?
Whenever you view a profile, you can click on the "Add as Contact" underneath the contact's name. You can also do so through conducting a search in the directory or when someone responds to thread in one of your communities.

Q: Why should I add contacts to my contact list?
Creating this virtual address book is a great way to expand your network and stay in touch with your contacts. It allows you to connect through mutual connections and meet people you wouldn't have otherwise.

COMMUNITY DISCUSSIONS

Q: *How do I join/subscribe to a community?*
Go to "Communities" in the top blue navigation bar, then "All Communities" to see a list of communities you are eligible to join. Select one by clicking the blue "Join" button to the right of the community name and choose a delivery option for posts (Real Time, Daily Digest, or No Email).

If you choose "My Communities" from the "Communities" menu, you'll see a list of Communities you currently belong to.

Q: *How do I start a new discussion thread?*
On the community home page, click on "Discussion". Once in the discussion, select the purple "Post New Message" on the right side of the page. You can also start a new thread under "Participate" from the blue navigation menu.

From email, you can use the "Post New Message" link under the community heading.

Q: *How do I respond to others' posts?*
You can reply to a post, by clicking "Reply" on the right side of the message. This will allow you to post your response publically to all members of the community. If you want to reply only to the sender, click on the arrow next to "Reply" and select "Reply Privately".

In daily digest emails, you'll also see "Reply to Group" or "Reply to Sender" to the right of the discussion post. We encourage you to reply to the group if your post adds value to the overall discussion.

Q: *What are all the email delivery options?*
You can set your email preference for each community through your profile by selecting "My Account" and then "Community Notifications". For each discussion, you can select one of the following delivery options:

Real Time: sends an email every time a new message is posted.
Daily Digest: sends one email to you each day, consolidating all of the posts from the previous day.
No Email: allows you to be part of the group without having emails sent to you. You can still post and read others' messages by logging in to Interact.

Q: *Can I have posts from certain communities go to a different email address?*
Yes, you can have certain community posts go to different emails. You can update the email preference for each community through your profile, "My Account" > "Community Notifications" > "Add Override Addresses".

Q: *How do I leave a community or unsubscribe from a discussion?*
To leave a community, go to "Communities" from the blue navigation bar and select "My Communities". This will bring you to a list of all the communities that you belong to. Select the one that you would like to leave and click on the "Settings" button to the right of the name. From here you will be able to leave the community.

Q: What are "Networks"?

These are groups of members that are automatically created based on demographic information in your profile. They help you locate other members who live in your city or state, share your interests, have the same job title, and more. Be sure to visit "My Profile" > "My Connections" >"My Networks" to see your existing networks.

Q: How do I see a listing of all of the posts to a discussion forum?

Navigate to your list of "My Communities" by going to "Communities" in the main blue top menu.
Select the Community you are looking for and click on the "discussion" tab to see a threaded view of the posts.

If you see post you're interested in, click the subject line which will take you to the entire thread. You'll notice a button titled "Original message" at the bottom of all of the posts in a thread, this will display the original message that started that discussion.

LIBRARIES

Q: *How do I access a particular library?*

Select 'Communities" from the blue navigation bar and search for the community you are looking for. You will be able to select "Libraries" to the right of the community name.

Q: *How do the libraries get populated?*

Libraries are populated when members add attachments in a discussion post or when documents are uploaded directly.

Q: *How do I upload a document to the library?*

You can upload to the library by attaching a file in a discussion post or by directly uploading it in the library. In a discussion, you can select "Upload File" underneath your message. Before you submit, you will have the opportunity to edit the document title and description before it is uploaded.

Additionally, you can directly upload files the library by going to the desired library and clicking on the purple "Create New Library Entry". You will need to add a title, confirm you are in the correct library and choose entry type. This will then allow you to browse and upload your file. Once your file is uploaded, you can add comments or tags by clicking "Next". After you are done editing, click "Finish.

Q: *What kind of documents can I upload?*

You can upload multiple file types including hyperlinks, standard files (Word, Excel, and PowerPoint), webinars, and YouTube videos.

Q: *What are the "tags" for?*

Tags are a way of organizing and searching for documents and allows others to find documents based on a particular topic. There are many pre-loaded tag categories to choose from.

Q: How can I find a specific library entry?

Enter a search term in the upper right search box. On the search screen you can refine your results by community, author, files types, etc.