Managing Individual Account Information

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Sign into DistrictEnergy.org

1. Click “Sign In” in the top-right corner of www.districtenergy.org and enter your account login credentials. Please use your work email (for professional networking purposes).

   a. Enter your **login credentials** (using your work email)

   b. If you don’t remember your credentials, you may “reset your password.”

   c. If you don’t already have an account, you may **create an account** here.
Update Your IDEAConnect Profile

1. View your IDEAConnect Profile
   a. Click on your profile photo, then select “Profile”

2. Update your Profile Information
   a. Add a Profile Photo to boost your community visibility.
   b. Add your professional biography
   c. Import your LinkedIn Profile
   d. Show your Education History
   e. Show your Job History
   f. Highlight the Services you offer
   g. Edit your Contact Information (see below)
Edit Your Contact Details – Account Tab

1. From your profile view, click the “edit” pencil above contact information. This will take you to a back-end member database where you can manage your membership details.

Personal Info

1. Edit your Personal Info under the “Account Tab>Personal Info” tab. To add a biography, please do so by visiting the IDEAConnect Profile Page.

Please indicate the following:

a. Title

b. Gender

c. Preferred Communication

d. District Energy Magazine subscription preference

e. Areas of Expertise

2. Click Save
Contact Info

1. Edit your contact info by selecting “contact info” and choosing the appropriate tab to edit. You may add multiple addresses, phone numbers, and emails—but make sure you set a primary of each.

   a. **Primary** contact info will be indicated in your individual profile

   b. **Preferred Billing** address will be used for invoicing (applies only to the primary organization contact or organization financial contact)

   c. **Preferred Shipping** address will be used for mailing District Energy Magazine

   d. **Show In Directory** contact info will be displayed in the Member Directory.
Additional Info

1. **Additional Info** can be used to indicate any designations you wish to include at the end of your name (such as PhD, PE, LEED AP), as well as professional licenses and languages spoken.

Change Password

1. You may manually **change your password** or **reset your password** here.
Edit Your Contact Details – Overview Tab

The overview page is a high-level view of your account contact information, IDEA Membership status, your IDEA Membership Type as well as any open balances or upcoming membership dues associated with your account.

1. **Individual Account Overview** shows the following:
   a. Your individual **record number**
   b. The **organization(s)** you belong to
   c. Your **primary contact information** (this will be displayed in the Member Directory).
   d. Indication of **membership status**
   e. Any **open balances** or upcoming renewal fees
   f. Your **membership type**

2. **Profile Photo**: Note – **do not upload your profile photo from this page**. Instead, please update your profile image from your IDEAConnect Profile Page.
Edit Your Contact Details – Organizations Tab

1. On the **Organization Tab**, you can see and manage the relationships you have with other organizations. **Relationship types** vary by the type of individual you are and your relationship with your organization and with IDEA. Most of what you see on this page is for internal IDEA purposes only, used for member management. It will not be viewable by other members in any way.

![Organizations Tab screenshot](image)

Relationship types are defined as follows:

a. **Employee / Employer**: You are an employee of the related organization.

b. **Listed Member Receiving Benefits / Employer**: Indicates the individual is a “listed member” of IDEA, and receives individual member benefits from the member organization.

c. **Primary Organization Contact / Employer**: Indicates the individual is the primary membership contact for the member organization. IDEA will contact this individual for membership renewal, listed member updates, etc.

d. **Primary Financial Contact / Employer**: IDEA will send or CC all membership invoices to this individual.

e. **Primary Exhibitor Contact / Employer**: IDEA will contact this individual for all exhibitor-related activity.

f. **Primary Advertising Contact / Employer**: IDEA will contact this individual for all advertising-related activity.
Edit Your Contact Details – Purchases Tab

The purchases tab is a historical reference of memberships and membership purchases, for your reference. You may also edit, and save payment options if you choose (or choose not) to auto-renew your membership.

1. **Recent Orders** show recent membership renewals purchased by you.

2. **Recent Invoices** show a list of invoices for recent purchases, for your reference.

3. **Recent Payments** for membership renewals.

4. **Memberships** show both active and inactive memberships with IDEA.

5. **Payment Options** show stored payment options that you may use for membership renewals, including auto-renewals if you choose to do so.