

# Managing Individual Account Information

## Table of Contents

**Table of Contents** ..... 1

**Sign into DistrictEnergy.org** ..... 2

**Update Your IDEACONNECT Profile**..... 3

**Edit Your Contact Details – Account Tab** ..... 4

**Personal Info** ..... 4

**Contact Info**..... 5

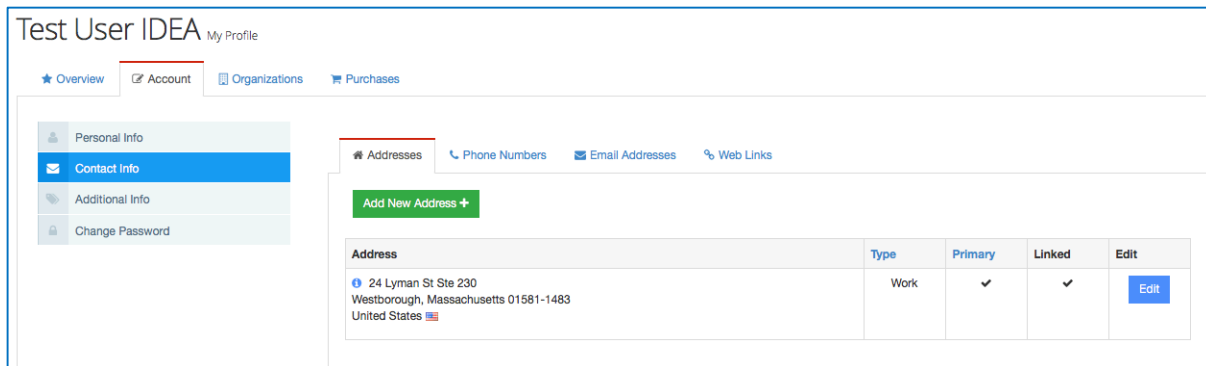
**Additional Info** ..... 6

**Change Password** ..... 6

**Edit Your Contact Details – Overview Tab** ..... 7

**Edit Your Contact Details – Organizations Tab** ..... 8

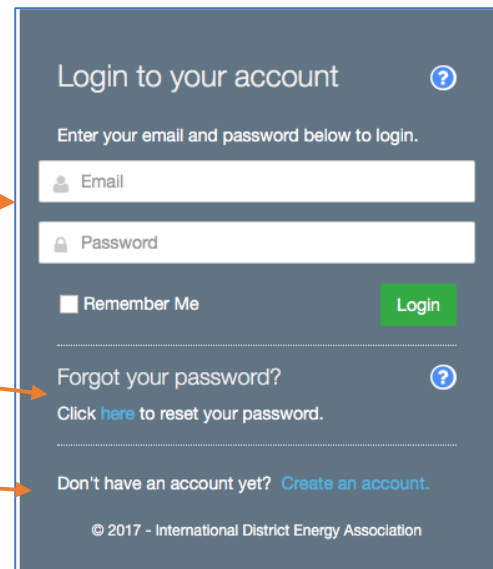
**Edit Your Contact Details – Purchases Tab** ..... 9



## Sign into DistrictEnergy.org

1. Click “Sign In” in the top-right corner of [www.districtenergy.org](http://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.

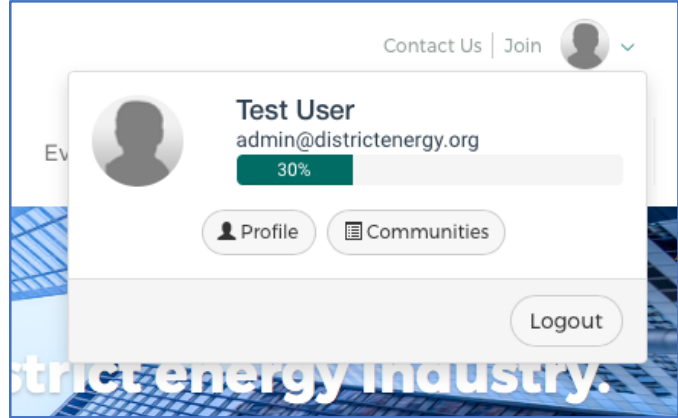


The screenshot shows the login interface for DistrictEnergy.org. It features a dark blue header with the text "Login to your account" and a help icon. Below the header, there is a prompt: "Enter your email and password below to login." This is followed by two input fields: "Email" and "Password". A "Remember Me" checkbox is located below the password field, and a green "Login" button is to its right. A horizontal separator line is present. Below the line, there is a link "Forgot your password?" with a help icon, and a sub-link "Click here to reset your password." Another horizontal separator line follows. At the bottom of the form area, there is a link "Don't have an account yet? Create an account." and a footer "© 2017 - International District Energy Association". Three orange arrows point from the instructions on the left to the "Email" field, the "Forgot your password?" link, and the "Create an account" link respectively.

# Update Your IDEAConnect Profile

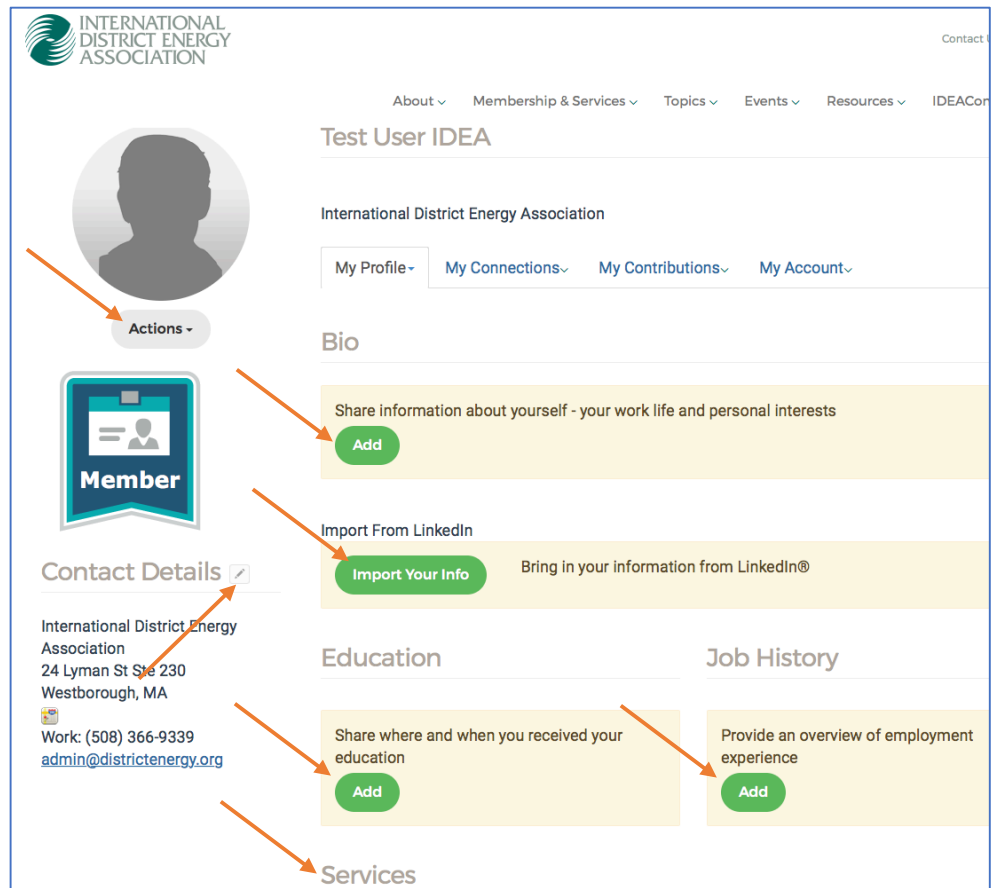
## 1. View your IDEAConnect Profile

- a. Click on your profile photo, then select “Profile”



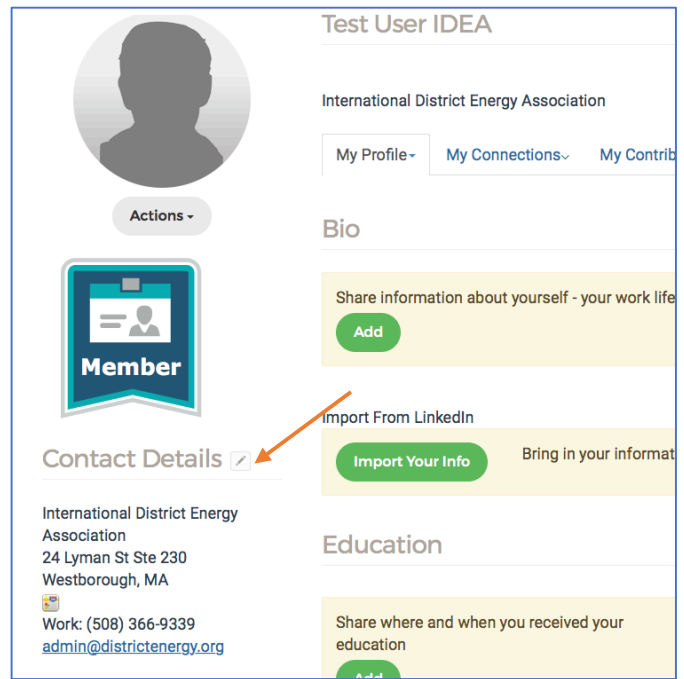
## 2. Update your Profile Information

- 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

- 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**.



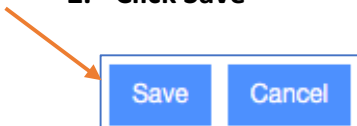
### Personal Info

- 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:**

- Title
- Gender
- Preferred Communication
- District Energy Magazine subscription preference
- Areas of Expertise

- Click Save**



**Personal Info**

- Prefix: Test User
- First Name: \*
- Middle Name:
- Last Name: \*
- Second Last Name:
- Preferred First Name:
- Suffix:
- Title: Title
- Gender: Unknown
- Preferred Communication Method: Unknown

**District Energy Magazine Subscription**  
IDEA Members are entitled to one FREE District Energy Magazine subscription. Please indicate shipping address if different from your work address by clicking "Contact Info>Addresses" in Contact IDEA for additional print subscriptions, or print subscriptions for non-members.

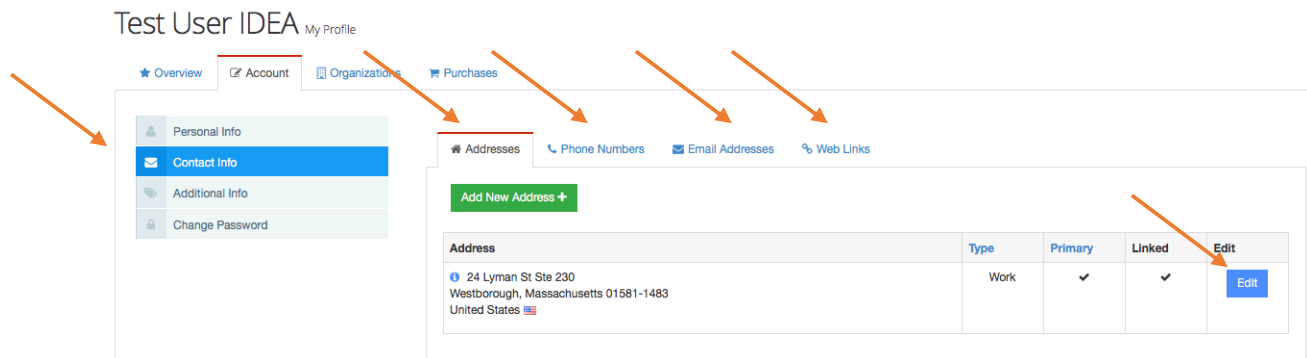
District Energy Magazine Subscription Preference: Print Only

**Areas of Expertise:**

- Master Planning & Community Planning
- Business Development
- Financing
- Environmental Compliance
- Policy & Legislation
- District Heating
- District Cooling
- CHP / Cogeneration / Trigenation
- Microgrids
- Renewable Energy

## 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](#).

Add Address

Link to Organization:

Country: \*  
United States

Address: \*  
Work  
Address Line 1

Address Line 2:  
Address Line 2

City, State, Zip: \*  
City  
State  
Zip

Save as Primary Address:

Save as Preferred Billing Address:

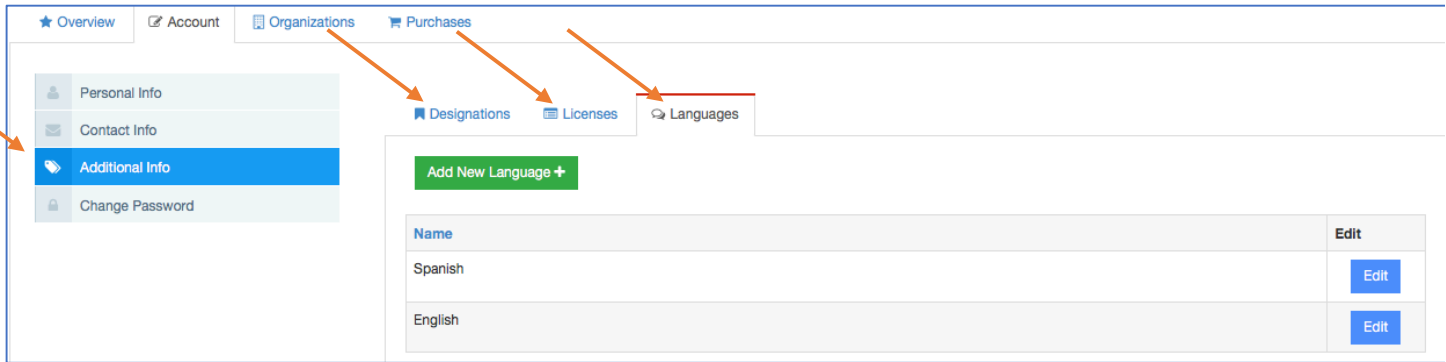
Save as Preferred Shipping Address:

Show in Directory:

Save Cancel

## 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.

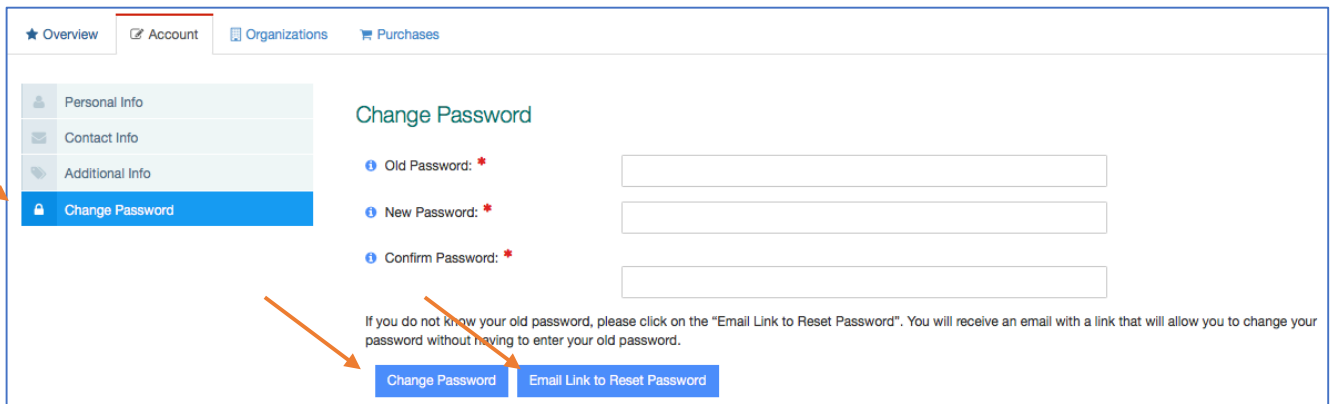


The screenshot shows a user profile page with a navigation menu on the left and a main content area. The navigation menu includes 'Personal Info', 'Contact Info', 'Additional Info' (highlighted in blue), and 'Change Password'. The main content area has tabs for 'Designations', 'Licenses', and 'Languages'. Below the 'Languages' tab, there is a green button 'Add New Language +' and a table with two rows: 'Spanish' and 'English', each with an 'Edit' button.

Name	Edit
Spanish	<a href="#">Edit</a>
English	<a href="#">Edit</a>

## Change Password

1. You may manually **change your password** or **reset your password** here.



The screenshot shows the 'Change Password' page. The navigation menu on the left includes 'Personal Info', 'Contact Info', 'Additional Info', and 'Change Password' (highlighted in blue). The main content area has the title 'Change Password' and three password input fields: 'Old Password: \*', 'New Password: \*', and 'Confirm Password: \*'. Below the input fields, there is a text block: 'If you do not know your old password, please click on the "Email Link to Reset Password". You will receive an email with a link that will allow you to change your password without having to enter your old password.' At the bottom, there are two buttons: 'Change Password' and 'Email Link to Reset Password'.

## 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**

#2021526

International District Energy Association  
24 Lyman St Ste 230  
Westborough, Massachusetts 01581-1483  
United States

(508) 366-9339  
admin@districtenergy.org

RECEIVES MEMBERSHIP BENEFITS

OPTED-IN TO SHOW IN MEMBER DIRECTORY

### 2. Profile Photo: Note – **do not upload your profile photo from this page**. Instead, please update your profile image from your [IDEAConnect Profile Page](#).

Pay Open Balances

No open balances

Membership

RECIPROCAL MEMBER  
EXPIRES:  
12/31/2069  
International District Energy Association

Test User IDEA, PE My Profile

Overview Account Organizations Purchases

add

#2021526

International District Energy Association  
24 Lyman St Ste 230  
Westborough, Massachusetts 01581-1483  
United States

(508) 366-9339  
admin@districtenergy.org

RECEIVES MEMBERSHIP BENEFITS

OPTED-IN TO SHOW IN MEMBER DIRECTORY

Add Image

## 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.

Name	Relationship	Manage
International District Energy Association	< International District Energy Association is <b>Employer</b> of Test User > Test User is <b>A Listed Member Receiving Member Benefits</b> of International District Energy Association	<a href="#">Manage</a>
International District Energy Association	< International District Energy Association is <b>Primary Employer</b> of Test User > Test User is <b>Employee</b> of International District Energy Association	<a href="#">Manage</a>

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.

International District Energy Association My Organization

★ Overview   Account   Individuals   **Purchases**

- Recent Orders
- Recent Invoices
- Recent Payments
- Memberships
- Certifications
- Credits
- Payment Options

Number	Main Item	Total	Balance	Created On	View
--------	-----------	-------	---------	------------	------

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.