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P.O. Box 302
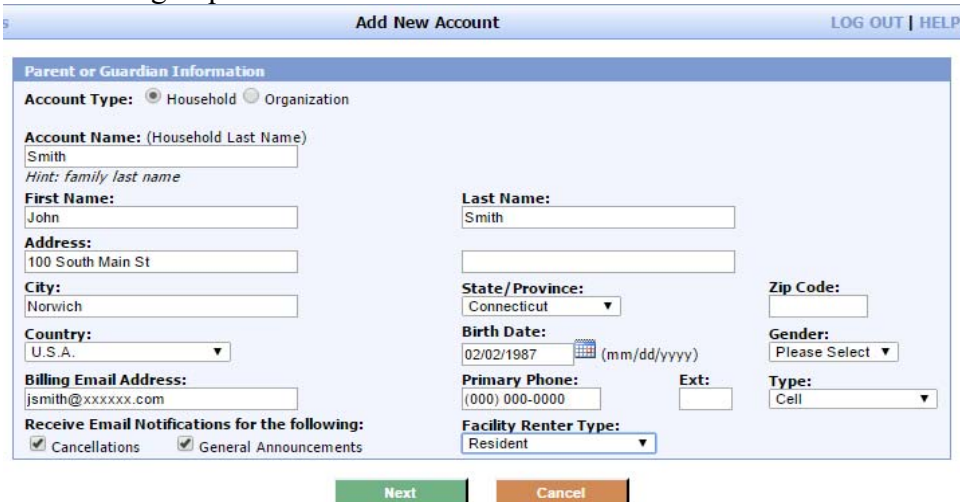Killington, VT 05751
Phone: 1-866-466-9732
Fax: 802-440-3074

New Feature Cheat Sheet for the Update to New Account Creation for the Management side

The Add New Account form has been changed to streamline data entry. There is also a new address validation feature that will compare the address entered against a postal service database to confirm the address is valid. If the address cannot be validated, the program will make suggestions as to the correct address or ask the member to confirm that the address given is correct as given. The address validator also helps to standardize the street names, for example, if the user entered Road or Street as part of the name, the validated address will be RD or ST.

To enter an account on the management side:

1. In Accounts, go to Add New Account

2. Enter the following required fields:

Account Type- Household or Organization
Account Name – Usually Household Last Name or Organization name if organizational account
First Name and last name of the primary account holder
Address
City, State, Zip Code, Country (Default USA)
Birthdate and Gender
Billing Email Address, Primary Phone Number and type (home, work, cell).
Email Notifications for Cancellations and General Announcements- default is checked, uncheck to opt out
Facility renter type- Used if there are public facility rentals, usually resident/non-resident but could be other types.

After entering information click Next.

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3. After clicking Next, there is now a feature to automatically validate the address against known addresses. If the address cannot be confirmed, there will be a screen that gives suggestions for possible correct addresses. It also has an option that the address given was correct because an address can be correct, but for some reason, not in the postal service database. Select either the corrected address or The address I entered was Correct option and click next, or click the back button to make corrections to the address.

Confirm Address- Showing an incorrect address

Confirm Address

The following address could not be confirmed:

Address Line 1:	100 South Main Street
Address Line 2:	
City:	Norwich
State:	CT
Zip Code:	06360
Country:	US

Select the option that applies:

○   My address is: **100 MAIN ST, NORWICH, CT, 06360, US**

○   My address is: **100 N MAIN ST, NORWICH, CT, 06360, US**

○   My address is: **100 W MAIN ST, NORWICH, CT, 06360, US**

○   The address I entered is correct.

[Back]   [Next]   [Cancel]

4. Next, you will be asked to complete the contact information.   If you had selected Cell as a phone type, you will be asked to select the carrier.   There is a checkbox to receive text notifications also.

Add New Account

Parent or Guardian Contact Information

Primary Phone:	**Ext:**	**Type:**
(860) 246-8100		Cell ▼

☐ Receive Text Notifications   --Select a Carrier ▼

Billing Email Address: **Receive Email Notifications for the following:**   ☐ Add Additional Phone #'s
jsmith@xxxx.com   ☑ Cancellations   ☑ General Announcements   ☐ Add Additional Email

Emergency Contact: **Emergency Contact Phone:**

5. If you wish to add more phone numbers, check the Add Additional Phone #'s checkbox. The Add Additional email checkbox will allow more emails to be added. This example has both checkboxes checked:

6. Enter Emergency Contact name and phone number.

7. In the next section, Additional Information, go to Medical Information.

8. If you have no medical information to enter, click the option No Medical Information.
   If the member has a known medical condition, click the option to Enter Medical Information.
   This will open a textbox, enter any relevant medical information.

Note: If you entered Medical Information and wish to change it to no medical information, change the option, but this does not delete the text that was entered previously.

9. Also in additional information, the account status is by default active.   Other checkboxes might be residential status and if the member is a coach or instructor.

> **Account Status:** ⦿ Active ◯ Inactive
> ☐ I am a local Resident of Easton, CT
> ☐ Member is a Coach or Instructor.

10. Question Section- Depending on your department, there might be questions to be answered. Please answer if they are present.

11. Public login information- enter   username and password. The username is usually the email address.

> **Public Login Information**
>
> | Username: | Password: | Confirm Password: |
> |---|---|---|
> | | | |