

# **CUSTOMER PORTAL HOW TO VIEW, EDIT & USE THE PROFILE & PARENT ACCOUNT**

## **SLIDE 1**

How to view, edit and use the customer portal profile and parent account.

## **SLIDE 2**

The profile contains basic information about the individual contact, or person, that can be updated or amended, by that person, as necessary.

## **SLIDE 3**

The parent account contains information about the account or company including, company name, address, ABN.

And associated contacts to that account.

This information can be updated or amended by a nominated account admin as necessary.

## **SLIDE 4**

The upcoming demonstration will show you how to view, edit and use the profile and parent account in the customer portal

## **SLIDE 5**

How to view & update your profile.

Click on the down arrow next to your name in the top right hand-side of the Customer Portal front page

Choose profile.

Amend information within your profile as required and click update to save changes.

## **SLIDE 6**

How to view and update the parent account.

Navigate to parent account via the arrow.

Within the parent account you can update information as required.

All contacts are listed that are associated to that account including, name, email address.

The role, whether they are an account admin or account user.

The contact status, whether they are active. Not invited, or have an invitation pending.

An account admin, can create a new contact, by clicking on the blue create button.

Use the drop down beside the contact name to edit, deactivate, or invite a contact.

Once all updated click save.

## **SLIDE 7**

**Note. that from the Parent account details page, you are also able to view all the documents, that are associated to the account.**

And you are able to change your password, if required, for access to the customer portal

## **SLIDE 8**

For any questions, feedback, system enhancement suggestions or general enquiries, please contact your local district from the details provided here.