

Updating your SmartPortal Profile

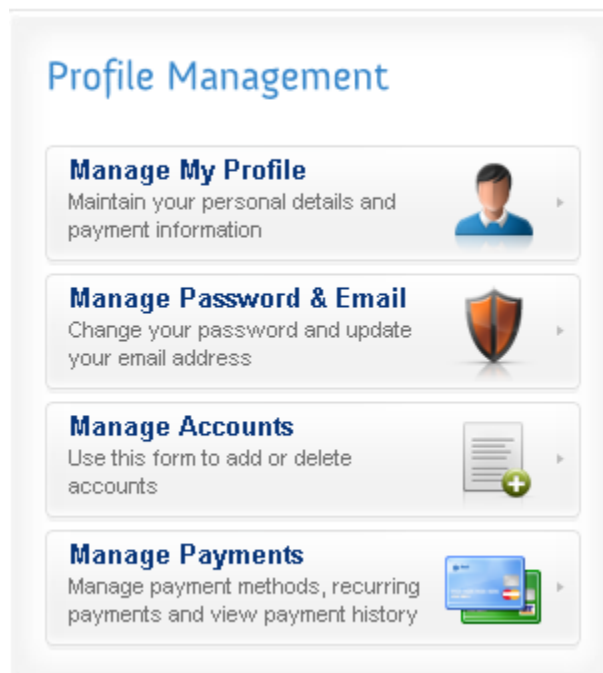
Now that you have taken the opportunity to log in to the SmartPortal, it's time to update your profile. Updating your profile on a regular basis will help us communicate clearly and efficiently, reducing the time necessary for your staff to maintain accounts.

To update your profile, follow these simple steps:

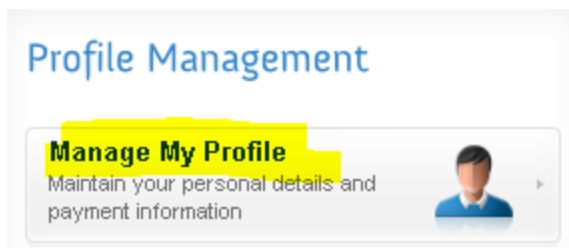
Log into the SmartPortal and select My Profile—located under your name in the top, right-hand corner. For reference, note the highlighted section below.



Once you select My Profile, four editable activities will appear below the Profile Management tab.

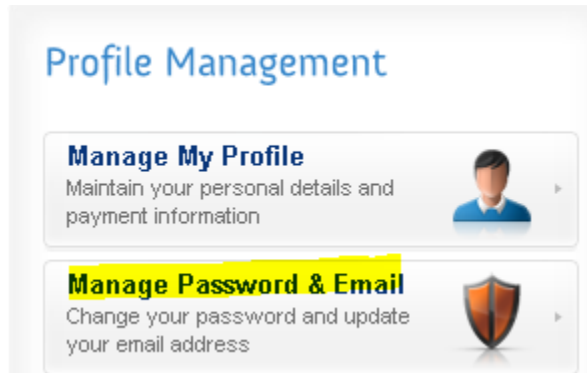


These directions provide a brief introduction to the ways in which you can modify or update your profile information.

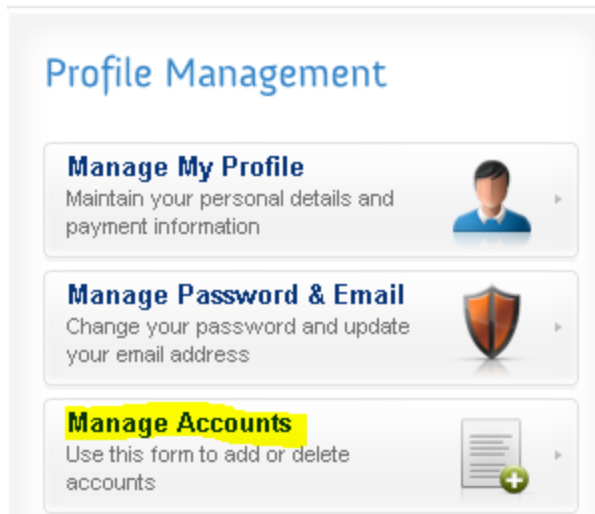


The Manage My Profile tab will allow you to update your phone number and/or to select if you wish to enroll in IVR (coming soon). While most of the fields are optional, the more information provided the more The PLD Group can customize your experience and meet your specific needs.

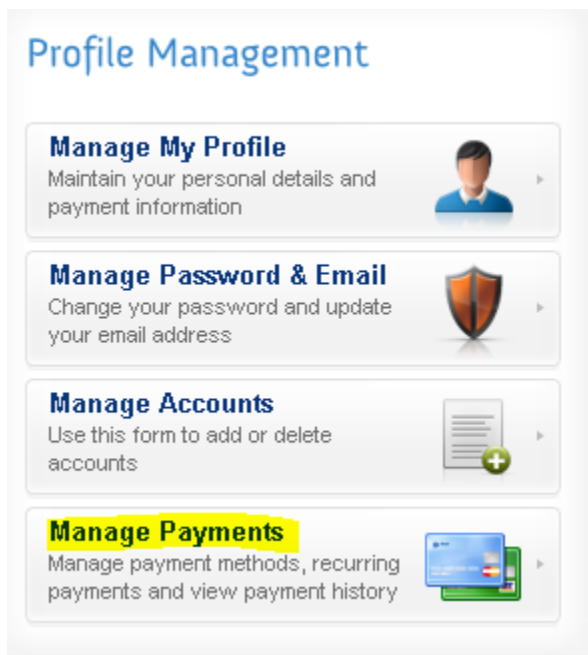
If you are updating your profile in our online bill payment/e-statement presentation; this is where you can uncheck the Email box if you no longer wish email notifications. That your statements are ready for viewing.



The Manage Password & Email tab will allow you to update passwords as well as the linked email address(es). Have you experienced staff changes? Do you want to ensure your information is secure? Establishing a habit of updating passwords frequently helps to protect you and your customers. In addition, ensuring the email address(es) on file link to the correct staff member will save you time and headaches in the future.



The Manage Accounts tab is only editable by the administrator. If information in this section is incorrect, please contact us at your earliest convenience.



The Manage Payments tab will allow you to update your payment information, schedule payments, and/or view your payment history. This feature is only available when Online Bill Payments is activated, or if you are updating your profile on our site <https://invoices.thepldgroupinc.com>

Do you have suggestions on how these features can be enhanced? Send us an email at thepldgroup@thepldgroup.com or call us at (877) 210-9377 ext. 102