



Manage **External Users** Guide for Administrators

This guide shows you how to:

- *Change customer passwords*
- *Require customers to change their passwords upon login*
- *Identify customers as primary users for specific accounts*
- *Add or change customer email addresses in the system*

Manage External Users

Use the **Manage External Users** tab to change customer passwords, require customers to change their passwords when they log into **DOCULIVERY**, or identify customers as the primary users for specific accounts.

To access the Manage External Users tab:

1. Type the web address:
www.doculivery.com/internal/(your company)
into your Internet browser window.
2. Log in using the account number and password that were assigned to you and click on the **Log In** button.
Passwords are NOT case-sensitive.

The login screen features a header with the text "Your Logo here". Below the header, it says "Please log-in to the e-Statement system." There are two input fields: "User Name:" and "Password:". Below these fields is a "Log In" button.

3. Click on the **Manage External Users** tab.

The dashboard screen shows a header with "Your Logo here" and a navigation bar with tabs: "Archive Research", "Transmission Log", "Inform Management", "Preferences", "Manage Internal Users", "Manage External Users", and "Payment Report". Below the navigation bar, there are several input fields for searching: "Account Name:", "Account Number:", "Login ID:", "User First Name:", and "User Last Name:". There are also "Search" and "Clear Fields" buttons.

To review a customer's information:

1. Enter any combination of the customer's name, account number, and/or user name in order to locate the customer you're looking for, and then click on the **Search** button.
The example shown displays a search conducted using the customer's exact name.
2. Click on the **Select** link to the left of the account name for the customer whose information you'd like to review.

The search results screen shows a table with columns: "ACCOUNT NAME", "LOGIN ID", "FIRST NAME", "LAST NAME", and "ACCOUNT NUMBER". The table contains two rows of data. A red arrow points to the "Select" link next to the first row.

ACCOUNT NAME	LOGIN ID	FIRST NAME	LAST NAME	ACCOUNT NUMBER
Select: JOHN A SMITH	3484006	JOHN A	SMITH	123-xx-9901
Select: JOHN A SMITH	3484007	JOHN A	SMITH	123-xx-9901

3. To change the customer's password, click on the **Change Password** button. A New Password field will appear. Enter the new password into this field, and click on the **Save Changes** button.

4. To require customers to change their passwords the next time that they log onto DOCULIVERY, place a check mark in the box next to the question, "Force user to change password on next login?" by clicking directly into the box, and then click on the **Save Changes** button.

Note: This box may already be checked if the customer has:

a) been assigned a temporary password following an account lockout,

OR

b) is still using a generic password that needs to be strengthened for security purposes.

You can remove this restriction temporarily by clicking into the check box to remove the check mark and then clicking on the **Save Changes** button.

Please keep in mind, however, that all customers should maintain confidential passwords that cannot be easily obtained or guessed by others.

5. If a customer has locked out their account through an excessive number of incorrect login attempts, you'll see a notation on the screen that the customer has been locked out.

6. To identify the customer as the primary user for that account, place a check mark in the box next to the question, "Is this user the primary user on the account?" by clicking directly into the box, and then click on the **Save Changes** button.

Make this my default page | Log Out
You are logged in as 10235399
You are working with Statements

Archive Research Transmission Log InfoForm Management Preferences Manage Internal Users Manage External Users Payment Report

Delete User

First Name: JOHNA
Last Name: SMITH
Email:
Login ID: JSMITH001
Password: [Change Password](#)

☒ Force user to change password on next login?
☒ Is this user the primary user on the account?

[Save Changes](#) [Cancel Changes](#)

Make this my default page | Log Out
You are logged in as 10235399
You are working with Statements

Archive Research Transmission Log InfoForm Management Preferences Manage Internal Users Manage External Users Payment Report

Delete User

First Name: JOHNA
Last Name: SMITH
Email:
Login ID:
New Password: [Don't Change Password](#)

☒ Force user to change password on next login?
☒ Is this user the primary user on the account?

[Save Changes](#) [Cancel Changes](#)

Make this my default page | Log Out
You are logged in as 98765000
You are working with Statements

Archive Research Transmission Log InfoForm Management Preferences Manage Internal Users Manage External Users Payment Report

Delete User

First Name: STEPHEN
Last Name: EZELL
Email:
Login ID:
Password: [Change Password](#)

☒ Force user to change password on next login?
☒ Is this user the primary user on the account?

The user is currently locked out of the system. ☐ Unlock user

[Save Changes](#) [Cancel Changes](#)

Make this my default page | Log Out
You are logged in as 10235399
You are working with Statements

Archive Research Transmission Log InfoForm Management Preferences Manage Internal Users Manage External Users Payment Report

Delete User

First Name: JOHNA
Last Name: SMITH
Email:
Login ID: SmittyJ001
New Password: [Don't Change Password](#)

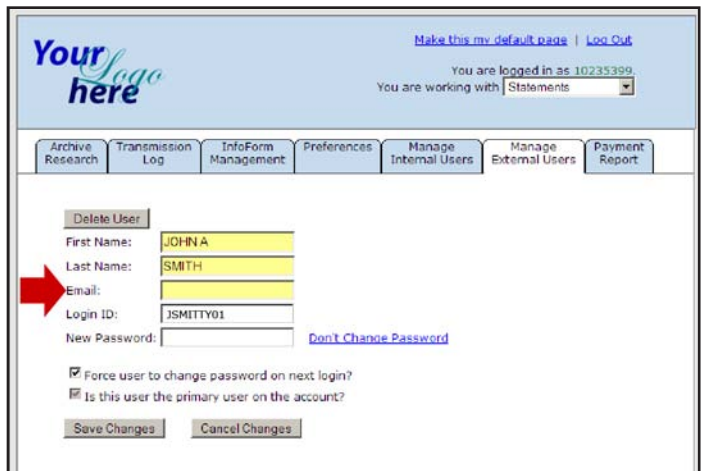
☒ Force user to change password on next login?
☒ Is this user the primary user on the account?

[Save Changes](#) [Cancel Changes](#)

☒ Is this user the primary user on the account?

7. To add or change a customer's email address on **DOCULIVERY**, type the customer's new or corrected email address into the **Email** field and then click on the **Save Changes** button.

*Note: All customers who want to receive email notification when their statements are ready or have forgotten passwords emailed to them must maintain a valid email address on **DOCULIVERY**.*



The screenshot shows the 'Your Logo here' header with a 'Log Out' link. Below the header is a navigation bar with buttons: 'Archive Research', 'Transmission Log', 'InfoForm Management', 'Preferences', 'Manage Internal Users', 'Manage External Users', and 'Payment Report'. The main content area is titled 'Delete User' and contains the following fields:

- First Name: JOHN A
- Last Name: SMITH
- Email: (highlighted with a red arrow)
- Login ID: JSMITTY01
- New Password: (empty field)

Below the fields are two checkboxes:

- ☒ Force user to change password on next login?
- ☒ Is this user the primary user on the account?

At the bottom are two buttons: 'Save Changes' and 'Cancel Changes'. A blue link 'Don't Change Password' is also present next to the 'New Password' field.

