DOCULIVERY
Online Document Solutions

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*
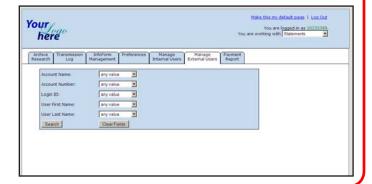
Manage External Users

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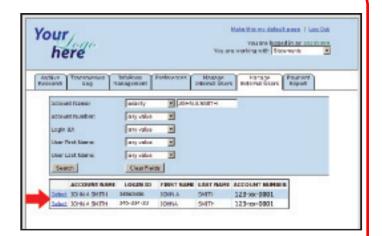
3.   Click on the **Manage External Users** tab.

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.

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
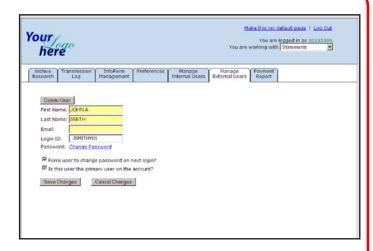account lockout,*

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
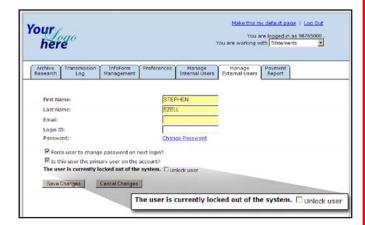Save Changes button.*

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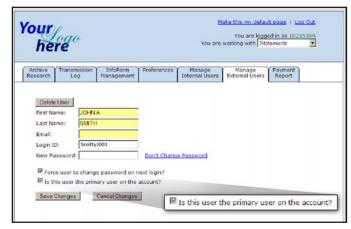obtained or guessed by others.*

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.

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.