DOCULIVERY
Online Document Solutions

Customer Guide

This guide shows you how to:

• View your most recent and historical statements

• Print statements in HTML or PDF format

• Set up email notification options

• Set up email delivery options

• Set up text messaging alerts

• View and/or delete your current notification options

• Change your DOCULIVERY password

• Add or change your email address on the DOCULIVERY system

Plus: Helpful tips on forgotten passwords, account lockouts, and missing email addresses!

Using the DOCULIVERY System

You can use the **DOCULIVERY** system to view your most recent and historical statements, print statements in HTML or PDF format, set up email notification and email delivery options for your statements, set up text messaging alerts, view and/or delete your current notification options, change your **DOCULIVERY** password, and add or change your email address on the **DOCULIVERY** system.

To log onto the Directo **DOCULIVERY** system:

1. Type the web address:
   www.doculivery.com/(your company name)
   into your Internet browser window.

2. Enter your unique User ID and Password. After you type in your User ID and password, click on the Log In button. You may be required to change your password at this time.

A Note about Forgotten Passwords: If you forget your password, but have NOT received a message telling you you're locked out of your account, click on the **Email me my password** *button, and a new temporary password will be emailed to the email address you have listed on* **DOCULIVERY**. *Once you receive your new temporary password, it's best to simply copy and paste it into the password field when you log in, since it may be hard for you to remember. You'll be able to change your password after you log in successfully with your temporary password!*

A Note about Account Lockouts: If you enter an incorrect User ID and/or password several times, your account may be locked out. If so, you will receive a message that tells you that your account has been locked out. This message will provide the contact information that you need to resolve this problem. Please follow the directions on the screen if this happens.

And, Finally, a Note about Missing Email Addresses: If your correct email address has not been entered into the **DOCULIVERY** *system, either by you or an administrator, we won't be able to send you a new temporary password if you forget yours! So please take a moment to follow the instructions in this guide to enter your correct email address into the* **DOCULIVERY** *system.*

To view and print your most recent statement:

1. From the **Statements** tab, click on the blue arrow below "**Click to View**." Your statement will open in a new window.

*Note: When you first log into **DOCULIVERY,** your first screen will display the Statements tab (as shown in the example), but you can also access your new statements from other **DOCULIVERY** screens by clicking on the Statements tab at the far left of the main menu.*
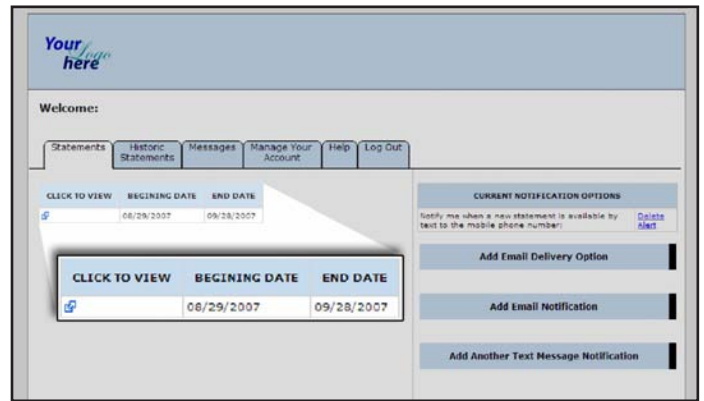
2. **To print the statement in HTML format**, click on the **Print HTML** Statement button at the top of the page, and follow the instructions for your printer.

3. **To print the statement as a PDF file**, click on the **View as a PDF** button.

*Note: In order to print the statement as a PDF file, you must have **Adobe Reader 8.0**. If you do not have it, click on the Adobe Reader 8.0 link at the top of the page to download this FREE program. Once you have followed the instructions for the download, you should be able to print the statement as a PDF file.*
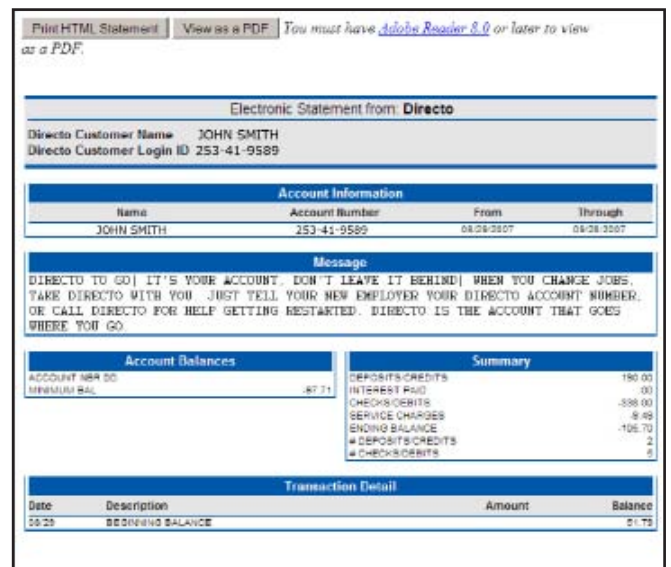
To receive your Doculivery statements via email:

1. From either the Statements or Messages tab, click on **Add Email Delivery Option**.

2. Type your email address into the **Enter Email address** field. If you'd like to test this email address, click on the **Send Email** button after entering your email address.
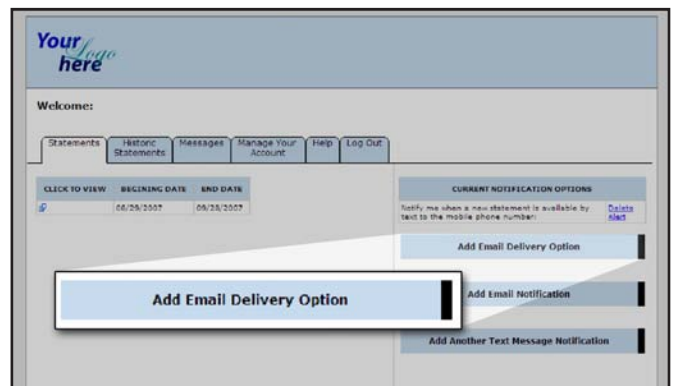
Next, select one of the following options by clicking into the box to add a check mark next to it:

Unencrypted as HTML - you'll receive copies of your statements via email. If you select this option, anyone who sees your email message might also see your confidential statement information, even if they're just looking over your shoulder, so think carefully before selecting this option.

Password-protected as PDF - you will receive your statement over email, but you must enter your password in order to view it.

After you have made your selection, click on **Save Delivery Options.**

To receive an email notification when your statement is available for viewing on DOCULIVERY:

1. From either the Statements or Messages tab, click on **Add Email Notification**.

2. Type your email address into the **Enter in Email address** field. If you'd like to test this email address, click on the **Send Email** button after entering your email address.

If you'd like to receive an email notification when your statements become available, place a check mark in the box that reads, "**Notify me when a new statement is available**" by clicking directly into the box.

3. Click on **Save Email Alerts** to complete your request.

To receive a text message when your statement is available for viewing on DOCULIVERY:

1. From the **Statements** or **Messages** tab, click on **Add Text Message Notification**.

Note: If you have existing text message alerts already set up, the details, including your telephone number, may appear under **Current Notification Options** on the **Statement** tab page as shown in the example. This information will NOT appear on the Messages tab. If you are adding a text message alert for a second telephone number, you must make that change on the **Statements** tab, not the **Messages** tab.

2. Type your cell phone number into the **Enter your cell phone number** field, and then click on the dropdown arrow in the next field to select your cell phone provider from the list. If you'd like to send a test message to your cell phone, click on the **Send Text** button when you're done.

3. Place a check mark in the box that reads, "**Notify me when a new statement is available**" by clicking directly into the box.

4. Click on **Save Text Message Alert** to complete your request.
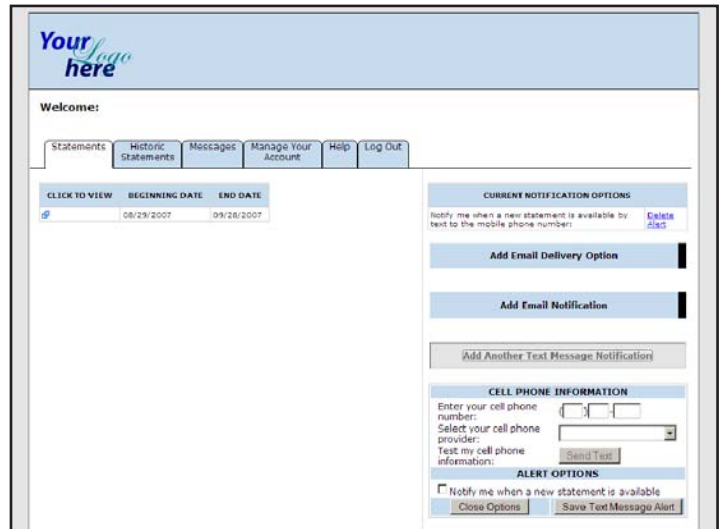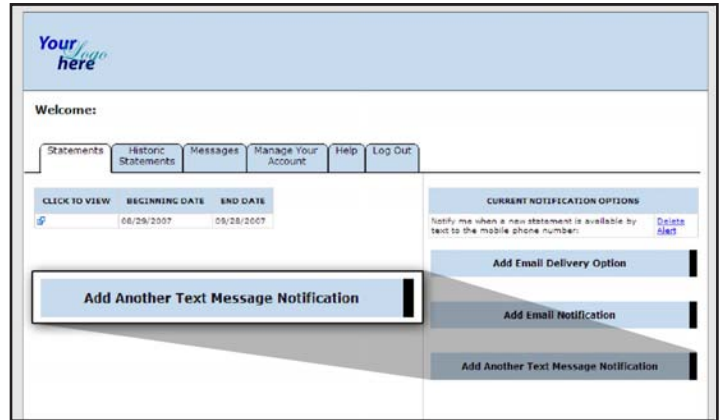
3. **To print the statement in HTML format**, click on the **Print HTML** Statement button at the top of the page and follow the instructions for your printer.

4. **To print the statement as a PDF file**, click on the **View as a PDF** button.

*Note: In order to print the statement as a PDF file, you must have **Adobe Reader 8.0**. If you do not have this, click on the Adobe Reader 8.0 link at the top of the page to download the program for free. Once you have followed the instructions for the download, you should be able to print the statement as a PDF file.*
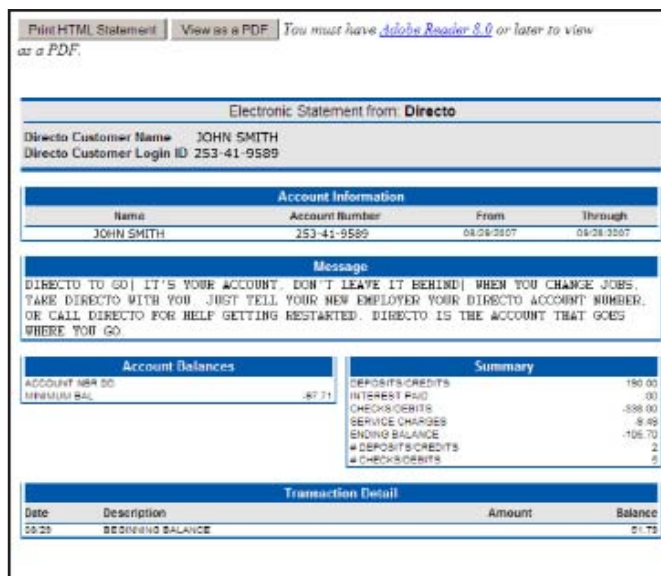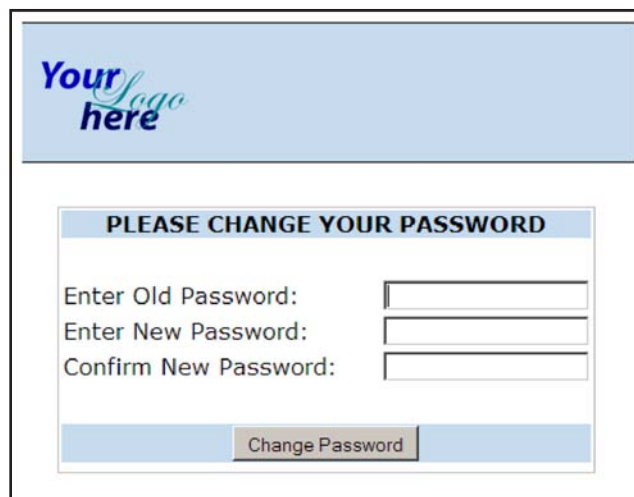

To change your **DOCULIVERY** password:

1. Click on the **Manage Your Account** tab.

2. Click on the **Change Password** link. A new window will open.
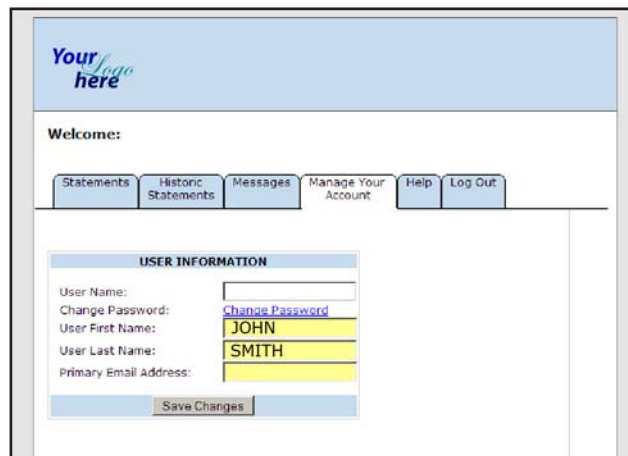
3. Enter your old and new passwords in the spaces provided. Make sure you enter your new password twice as requested, and then click on the **Change Password** button.

To change your email address on DOCULIVERY:

1. Click on the **Manage Your Account** tab.

2. Enter your email address in the **Primary Email Address** field and click on the **Save Changes** button.

Note: You must keep a valid email address on the DOCULIVERY system if you want to have your password emailed to you when you forget it!
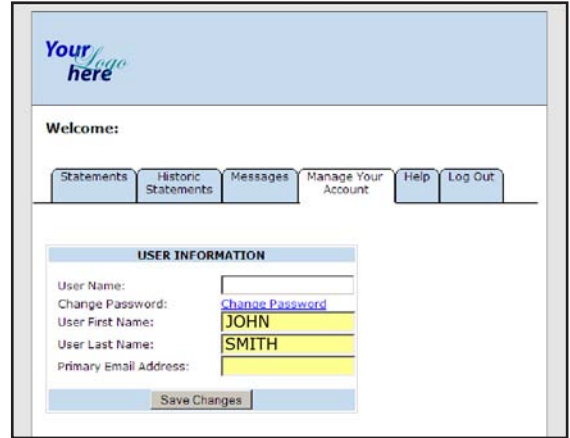
To view and/or delete your current notification options:

1. Click on the **Statements** tab.

2. Your current notification options will be listed at the top of the page on the right. If you want to delete your current notification options, click on the **Delete** link and then click **OK** when you are asked to confirm.