



Directo DOCULIVERY 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 Directo **DOCULIVERY** System

You can use the Directo **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.ezstub.com/directo** into your Internet browser window.
2. Your User ID is your Social Security number. Type in your User ID with no spaces or dashes.


The first time that you log in, your password will be your last name. You will be required to create a better password after you log in the first time, but until then, just use your last name. Passwords are NOT case-sensitive.

After you type in your User ID and password, click on the **Log In** button.

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 a Directo 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.

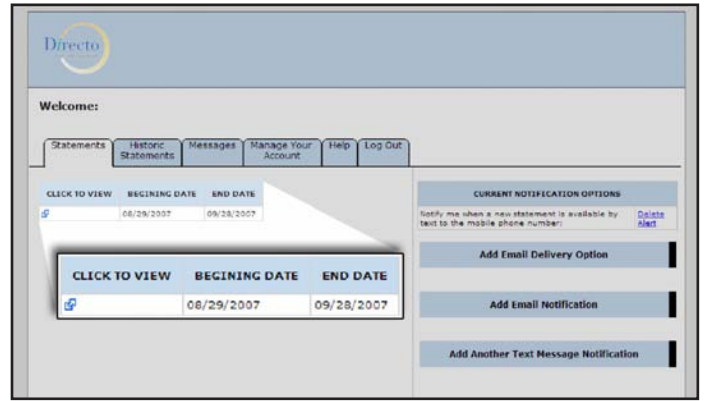


The screenshot shows the login interface for the Directo DOCULIVERY system. At the top left is the Directo logo. Below it, a blue banner reads "PLEASE LOG-IN TO THE DOCULIVERY SYSTEM." The main content area contains instructions: "Your user id is your social security number in the following format: XXXXXXXXX" and "Your initial password is your last name. You will be prompted to change your password upon completion of the initial login." There are two input fields: "User ID:" and "Password:". The password field has a "Forgot Password" link below it that says "Email me my password". A "Log In" button is positioned below the password field. At the bottom, a small line of text reads "Please contact Directo Customer Care at 877.422.2376 for further assistance."

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.

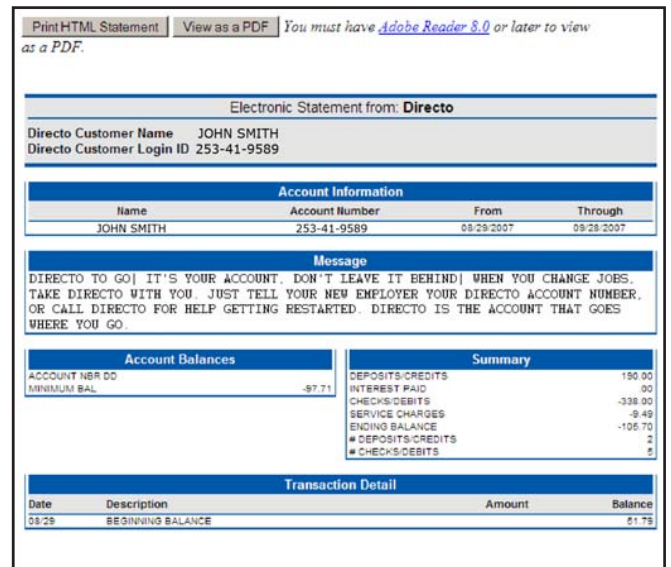
*Note: When you first log into **DOCULIVERY**, your first screen will display the Statements tab (as shown in the example), but you can also access your new statements from other **DOCULIVERY** screens by clicking on the Statements tab at the far left of the main menu.*



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.

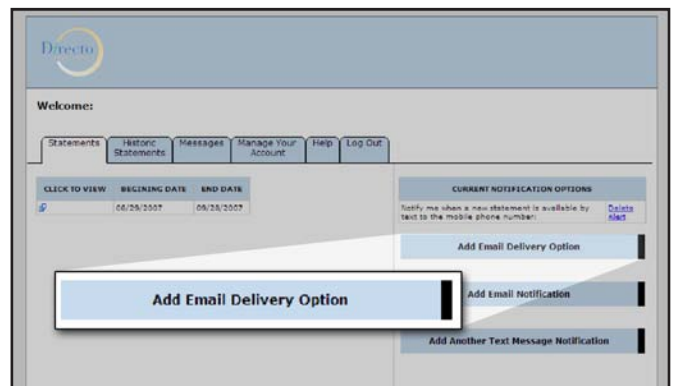
3. To print the statement as a PDF file, click on the **View as a PDF** button.

*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 Directo 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**.

The screenshot shows the Directo website interface. At the top, there's a navigation menu with 'Statements', 'Historic Statements', 'Messages', 'Manage Your Account', 'Help', and 'Log Out'. Below this is a table with columns 'CLICK TO VIEW', 'BEGINNING DATE', and 'END DATE'. The 'CURRENT NOTIFICATION OPTIONS' section is highlighted, showing a 'Notify me when a new statement is available by text to the mobile phone number?' checkbox and a 'Delete alert' link. Below this is an 'Add Email Delivery Option' button. The 'EMAIL INFORMATION' section has an 'Enter Email address:' field and a 'Send Email' button. The 'DELIVERY OPTIONS' section has two checkboxes: 'Email my statement unencrypted as HTML' and 'Email my statement password-protected as PDF', with 'Close Options' and 'Save Delivery Options' buttons below. At the bottom, there are 'Add Email Notification' and 'Add Another Text Message Notification' buttons.

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**.

This screenshot is similar to the previous one, but the 'Add Email Notification' button is highlighted with a blue border and a shadow effect, indicating it's the next step in the process.

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.

This screenshot shows the 'CELL PHONE INFORMATION' section highlighted. It includes fields for 'Enter your cell phone number:', a dropdown for 'Select your cell phone provider:', and a 'Send Text' button. Below this is the 'ALERT OPTIONS' section with a checkbox for 'Notify me when a new statement is available' and 'Save Text Message Alert' button. The 'Add Email Notification' button is still highlighted.

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

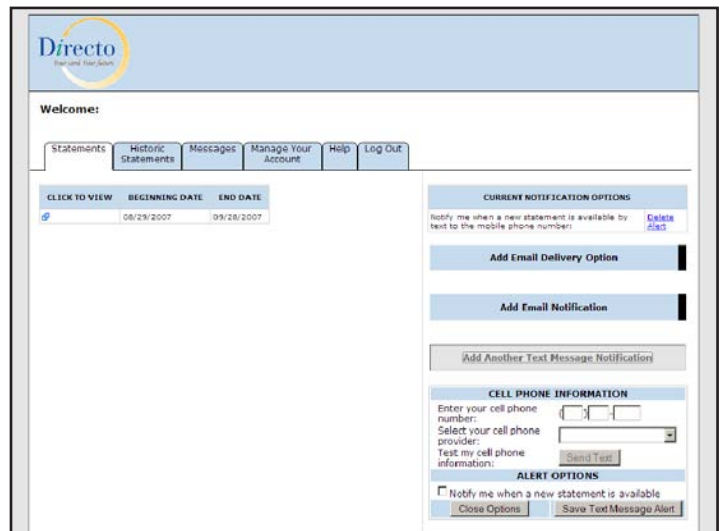
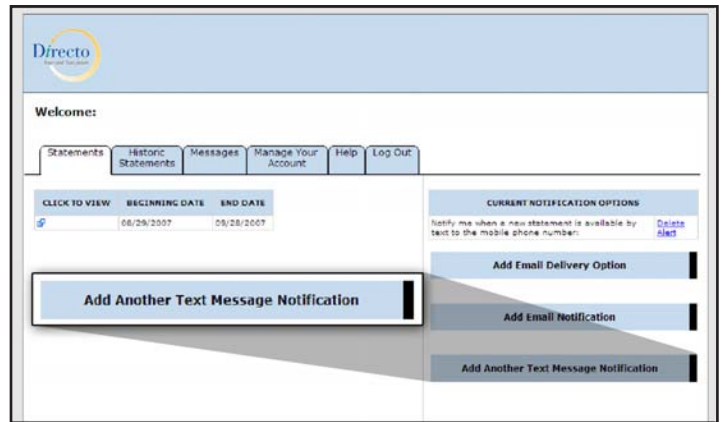
1. From the **Statements** or **Messages** tab, click on **Add Text Message Notification**.

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.

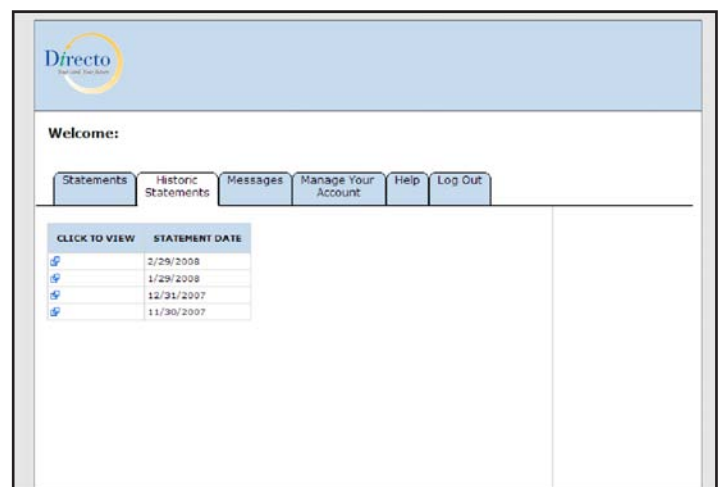
4. Click on **Save Text Message Alert** to complete your request.



To view and print a historic statement:

1. Older statements (up to six months old) can be retrieved from the **Historic Statements** tab.

2. Locate the date of the statement you want to view, and click on the blue arrow below **"Click to View"** to the left of the statement date. Your statement will open in a new window.



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.*

Print HTML Statement | View as a PDF | You must have [Adobe Reader 8.0](#) or later to view as a PDF.

Electronic Statement from: **Directo**

Directo Customer Name JOHN SMITH
Directo Customer Login ID 253-41-9589

Account Information			
Name	Account Number	From	Through
JOHN SMITH	253-41-9589	08/29/2007	09/28/2007

Message
DIRECTO TO GO! IT'S YOUR ACCOUNT. DON'T LEAVE IT BEHIND! WHEN YOU CHANGE JOBS, TAKE DIRECTO WITH YOU. JUST TELL YOUR NEW EMPLOYER YOUR DIRECTO ACCOUNT NUMBER, OR CALL DIRECTO FOR HELP GETTING RESTARTED. DIRECTO IS THE ACCOUNT THAT GOES WHERE YOU GO.

Account Balances		Summary	
ACCOUNT NBR DD		DEPOSITS/CREDITS	150.00
MINIMUM BAL	-\$7.71	INTEREST PAID	.00
		CHECKS/DEBITS	-338.00
		SERVICE CHARGES	-9.49
		ENDING BALANCE	-105.70
		# DEPOSITS/CREDITS	2
		# CHECKS/DEBITS	5

Transaction Detail			
Date	Description	Amount	Balance
08/29	BEGINNING BALANCE		61.75

To change your **DOCULIVERY** password:

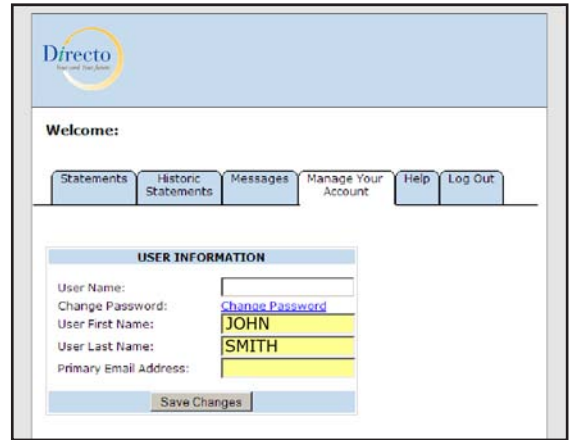
1. Click on the **Manage Your Account** tab.
2. Click on the **Change Password** link. A new window will open.

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.

