

## Update to changing a Username or Password in the Manager Portal

There is now a new and improved process for updating a User Name (email) or Password for your customers in the Active Carrot Manager Portal.

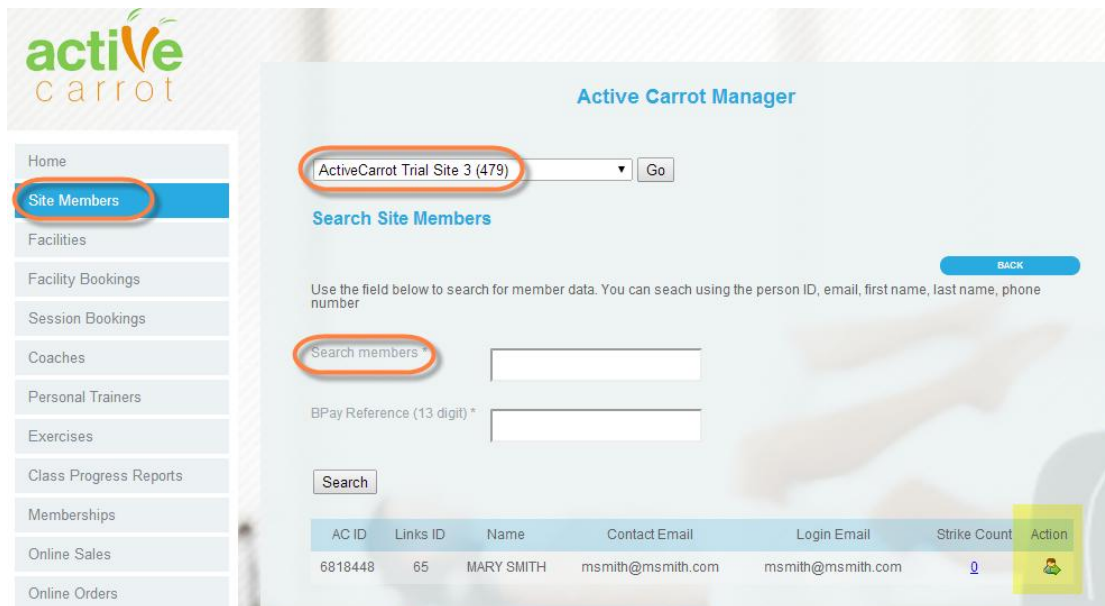
This will be available for you as of 29 October 2015.

Using the new process will no longer require a wait for the Links export to blast the details overnight. You will still need to update Links with the new email address as this will not happen automatically.


Please follow the below steps to do this.

1. Choose your location and search for the site member you need to change.

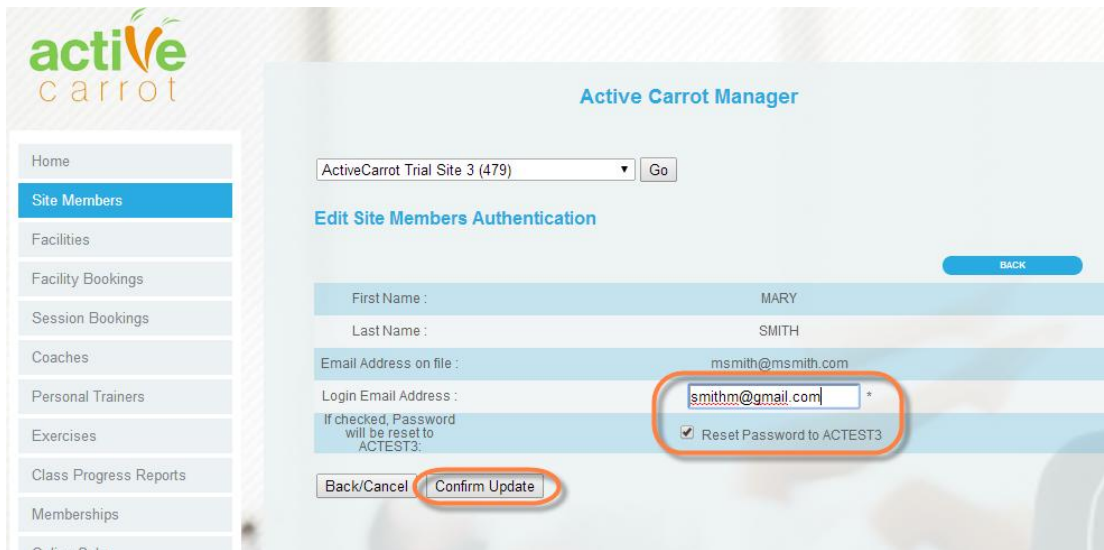
For those with multi location databases, you will only need to enter the new login details at **one location only** and the changes will then reflect across all locations.



The screenshot shows the 'Active Carrot Manager' interface. On the left is a navigation menu with 'Site Members' highlighted. The main content area is titled 'Active Carrot Manager' and contains a search form. A dropdown menu is set to 'ActiveCarrot Trial Site 3 (479)'. Below this is a 'Search Site Members' section with a 'BACK' button. A note states: 'Use the field below to search for member data. You can search using the person ID, email, first name, last name, phone number'. There are two input fields: 'Search members' and 'BPay Reference (13 digit)\*'. A 'Search' button is below the fields. At the bottom, a table lists member data with an 'Action' column containing a green person icon.

AC ID	Links ID	Name	Contact Email	Login Email	Strike Count	Action
6818448	65	MARY SMITH	msmith@msmith.com	msmith@msmith.com	0	

2. Select the member that needs updating by clicking on the Edit Authentication icon (aka the green action man)



Active Carrot Manager

ActiveCarrot Trial Site 3 (479) Go

**Edit Site Members Authentication**

BACK

First Name : MARY

Last Name : SMITH

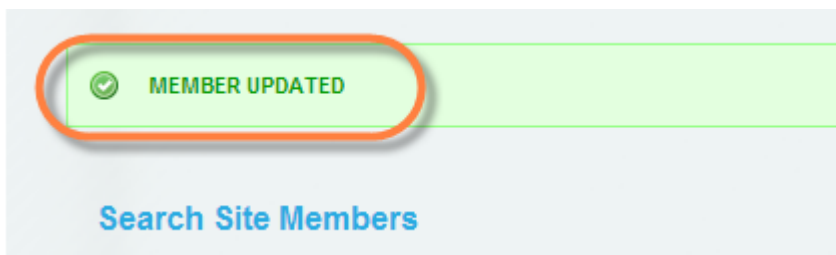
Email Address on file : msmith@msmith.com

Login Email Address : smith@gmail.com \*

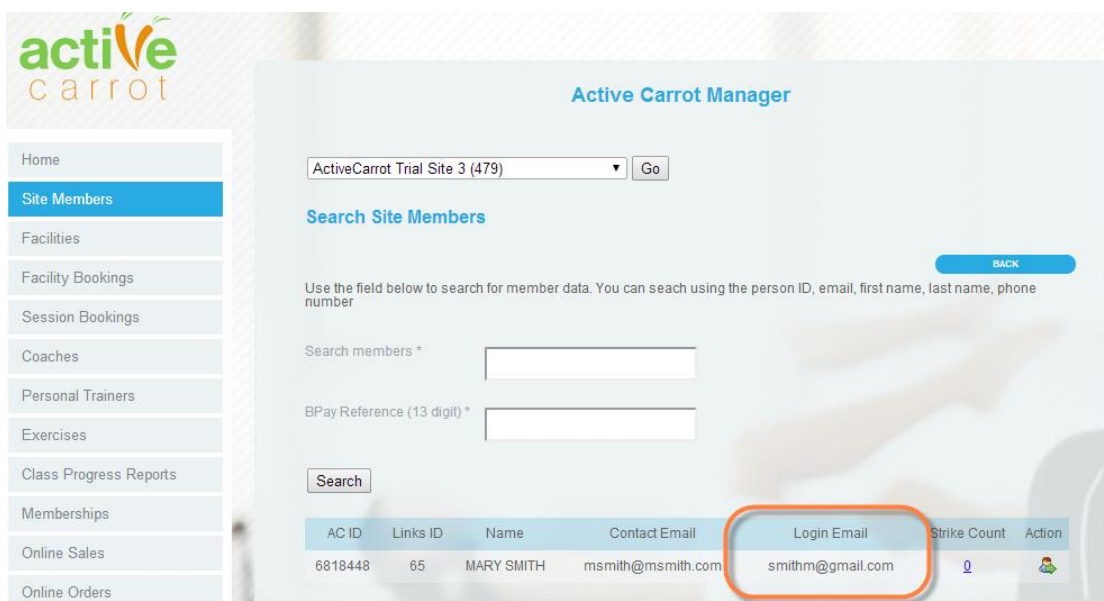
If checked, Password will be reset to ACTEST3:  Reset Password to ACTEST3

Back/Cancel Confirm Update

3. Enter the new Login Email address and/or tick the box to reset the password to your site's default password
4. Click 'Confirm Update' to save your changes. You should then see that the Customer is updated.



When you browse on the customer, you can see the new Login Email details



Active Carrot Manager

ActiveCarrot Trial Site 3 (479) Go

**Search Site Members**


BACK

Use the field below to search for member data. You can search using the person ID, email, first name, last name, phone number

Search members \*

BPay Reference (13 digit) \*

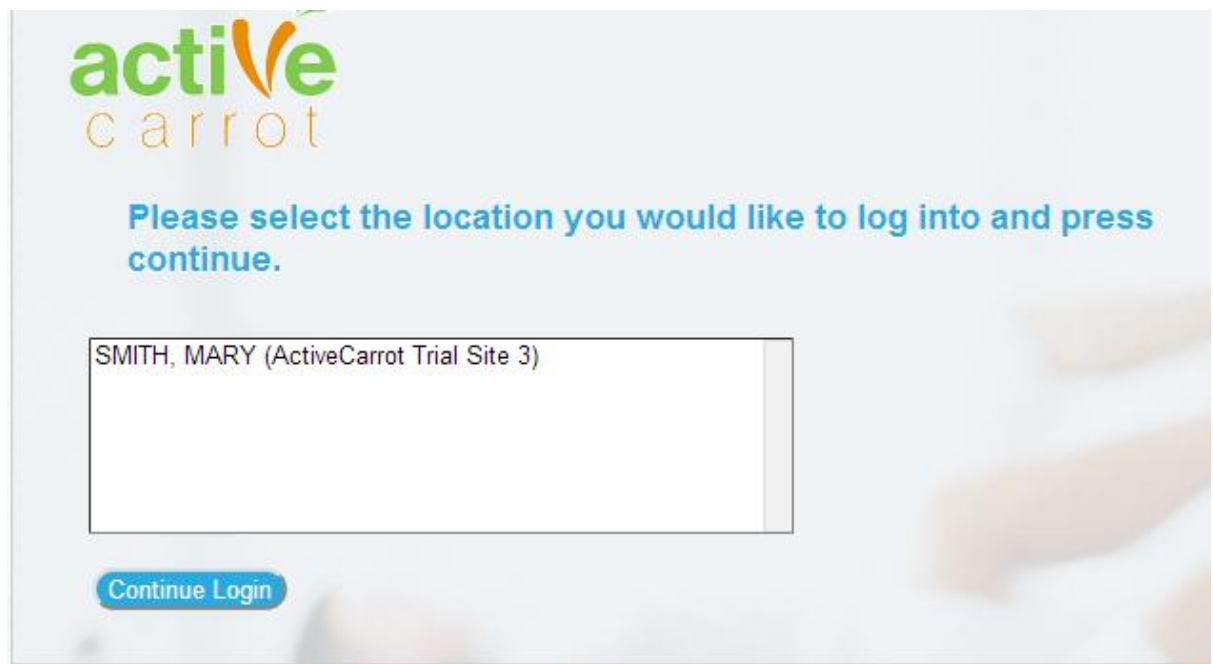
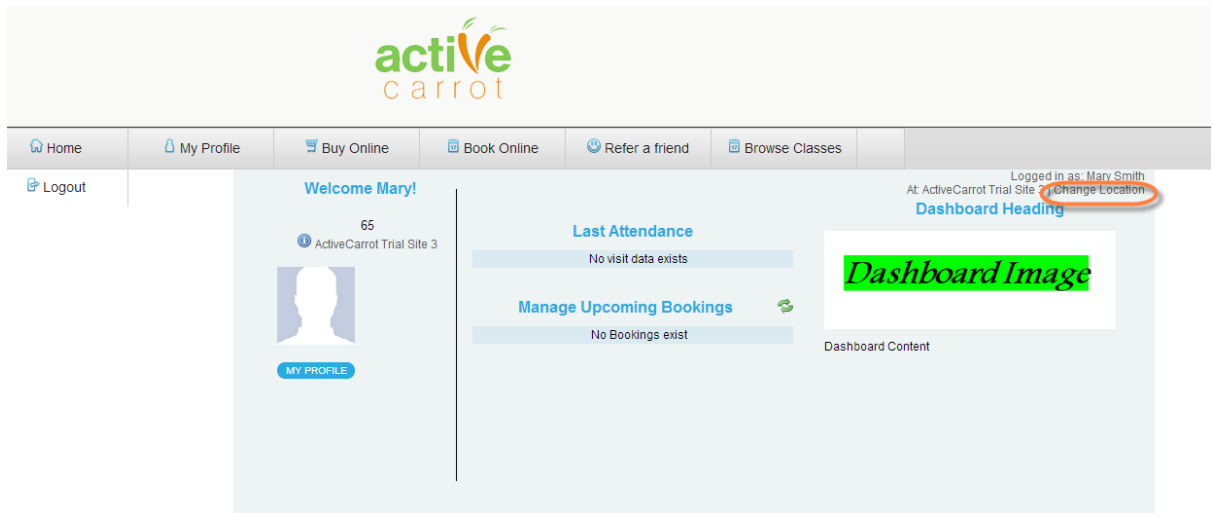
Search

AC ID	Links ID	Name	Contact Email	Login Email	Strike Count	Action
6818448	65	MARY SMITH	msmith@msmith.com	smith@gmail.com	0	



If you would like to test that the process has worked, you do this by logging in as your Customer to your Active Carrot Customer Portal URL.

Once you are logged in as the customer, and if you have a multi location database, then you can test switching between locations:



If you still have issues, please contact Links Support for further help on 03 9938 4567 or [support@linksmodularsolutions.com](mailto:support@linksmodularsolutions.com)