

Email Alias to new Revverdocs.com domain transition

Admin Changes

Steps to be done by an admin:

- Change domain in Google
- Change domain in Azure AD
- Change domain in Slack
- Change domain in TalentLMS
- Change Revver database for new domain
- Change username in Visual Studio (unverified)
- Change username in Gong
- Change username and email in Salesforce

End User Changes

Software and Services

Please read through EVERY software or service that you use to see what changes may need to be made before it will fully work.

Computer Login

- Mac
 - You will login the same as you always do.
 - When you are logged into your computer, you should open "Company Portal" and login with your revverdocs.com email address and password.
- Windows
 - Your PIN will still work to log you in.
 - To login with a password, it will say "incorrect password" UNLESS you select "Other User" and type in your email (with the revverdocs.com domain) and

password. This will log you into your existing account and will NOT create a new one.

Chili Piper

1. User Instructions
 1. Login with Salesforce
 2. Click your name in the bottom left hand corner
 3. Confirm your email has automatically changed (top left corner)

Docusign

1. User Instructions
 1. Click Reset Password if you do not remember your password
 1. You'll be prompted to login again and enter a verification code
 1. Go to <https://account.docusign.com/>
 2. Login (username will be your old Salesforce username: i.e. amaruji@efilecabinet.com)
 3. Click your initials in the top right hand corner
 4. Click "Manage Profile"
 5. Click "Update" next to Email Address
 6. View popup (NOTE: we have tested already-sent envelopes and seen zero issue with them); click "Continue"
 7. Enter your new email address (i.e. amaruij@revverdocs.com)
 8. Confirm code

Gong

- Anna → will change your primary email address and also add your old efilecabinet.com email as an alias so that Gong retains your activity in the past and going forward

Google

- Google will automatically recognize your domain change. You will not need to do anything.

- When you need to login to Google you will now use your @revverdocs.com email and the password is the same. You will no longer be able to login with your @efilecabinet.com
- Google will automatically create an alias for your @efilecabinet.com email address so you will continue to receive emails going to that address.

Goto / Jive

- You will use the same username and password you have always been using.

Lastpass

- Once your email address changes, LastPass will send you an email stating that your email address has changed. It asks you to login to LastPass. I don't know if that is necessary for most employees though. Employees who use a master password will have to do this.

Microsoft / Azure AD / Office

- Things will stay logged into your old account for a while and may work for a time. You will need to log out and log back in with the revverdocs.com domain.

Outlook

- Outlook will not work until you migrate or add a new account. I did not have any luck migrating an account but I was able to create a separate account using Google Sync.
- Overall the process for Outlook is not great and you should plan on this taking 15-30 minutes depending on how much data you need to download.

Outreach

1. No action is necessary and while your mailbox will show as still being efilecabinet.com, your emails will be sent from revverdocs.com; however, the following is recommended to keep usernames consistent:
 1. Login
 2. Click your initials in the bottom left hand corner
 3. Click "Personal Settings"

4. Click "Email & password"
5. Click "Change email address" button
6. Follow remaining instructions

Phone Apps

- Gmail
 - Your phone at some point will say there is an issue with your login. You will need to change your email or you may need to remove your efilecabinet.com account and add your revverdocs.com account.
- Microsoft Authenticator
 - On your authenticator app you will need to add a new profile with your Revverdocs.com email. If you get conflicts you may also need to remove your efilecabinet.com profile.
- Slack
 - If you use Slack on your phone it will ask you to change your details and login again.

Salesforce

1. Anna → will change user's email and username
2. User Instructions:
 1. User receives email asking them to confirm email change; follows link
 2. User logs in with Azure
 1. NOTE IN YOUR LASTPASS: your username has changed. While most users log in with Azure, it's still important to keep your username & password up-to-date in LastPass
 1. **For example: if your username was previously**
amaruji@efilecabinet.com, it is now
amaruji@revverdocs.com

Slack

- An admin will need to change your email address in Slack.
- After the change is made, everything will continue to work. You will get an email that your email address has changed.
- When your Slack login token expires and you need to log back into Slack, you will now do so with your revverdocs.com email address.

TalentLMS (Training)

- The domain has to be changed in your account before you can login.
 - (Note for admins who have passwords for this account: If you need to login via email you can use <https://efctraining.talentlms.com/login>)

Visual Studio

- Visual Studio will not recognize your license with your new domain until an admin changes your username in Visual Studio.

Zoom

- When you login to Zoom, Zoom will recognize that you have changed your email address and ask if you want to change it in the account. Confirm that you do.

Zoominfo

1. Login unaffected; however, emailed lists could be impacted
 1. Reach out to Anna in #salesforce_support if you'd like to change your ZI email address

Additional Notes:

- Google would not allow me to sent outgoing emails. I got the error "The "From" address is invalid. Please choose a valid one." After I restarted my browser everything worked fine. - This will not happen for everyone.
- Microsoft authenticator app may require you to type in your password again. Make sure you have SMS authentication as an option or make sure that you know what your password is.

Revision #25

Created 1 June 2023 17:43:03 by McKay Christensen

Updated 21 June 2023 21:57:32 by McKay Christensen