

Managing Security Codes

A security code is required when calling or chatting with us. Your security code will be used to quickly verify that you have ownership or authorization to make requests or changes to an account.

A security code can be created for the account and made viewable for each authorized contact or user on the account. Or each authorized contact or user on the account can have a unique security code.

Note: Significant service changes or cancellations will require additional approval.



Security code access should only be given to users with approval to submit requests, as requests may incur additional costs to expected monthly services.

Step-by-step guides in this article:

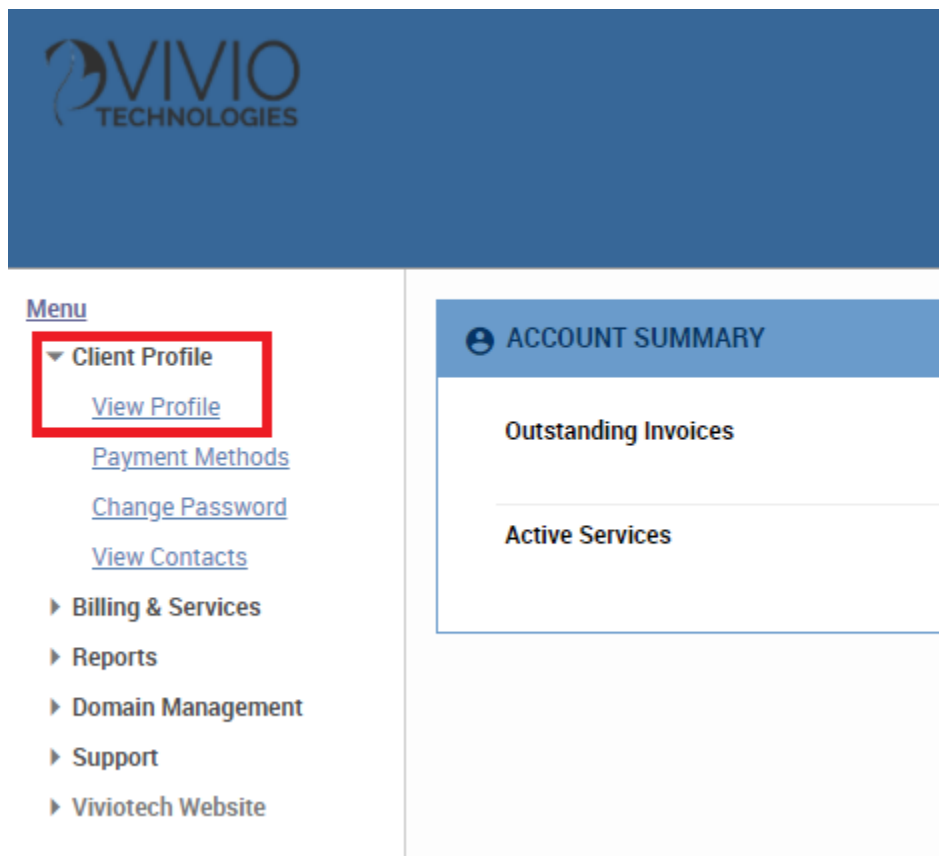
- [Your account-wide security code](#)
- [Allowing your other users to see the account-wide code](#)
- [Creating individual codes for your other users](#)
- [Changing permissions for your other users](#)

Your account-wide security code

Follow these steps to create or change the account-wide security code for your account.

Step 1: Log in to the [Vivio Client Portal](#).

Step 2: Under "Client Profile," **select** "View Profile."



Step 3: **Scroll** down to "CUSTOM FIELDS" and **select** "Edit."

CUSTOM FIELDS	EDIT
Account Verification	
Security Code:	

Step 4: In the new pop-up that opens, choose a new Security Code and **type** it in. (A minimum of eight characters is required. Do not use personally identifiable information such as your Social Security number or date of birth.)

Edit Custom Fields

Account Verification

Security Code:

?

Step 5: Select "Save Changes" on the bottom right-hand corner. The pop-up will close.

Save Changes

Cancel

Step 6: A message will appear at the top of your screen. "Success: Account information updated." Your account-wide security code is now ready to use!

✓

Success: Account information updated

x


If you need any help creating or changing the security code for your account, please [get in touch](#) with our Support team.

Allowing your other users to see the account-wide code

Follow these steps to let another user view the account-wide security code.

Step 1: Log in to the [Vivio Client Portal](#).

Step 2: Under "Client Profile," **select** "View Contacts."



Any Company

Menu

- ▼ Client Profile
 - [View Profile](#)
 - [Payment Methods](#)
 - [Change Password](#)
 - [View Contacts](#)
- ▶ Billing & Services
- ▶ Reports
- ▶ Domain Management
- ▶ Support
- ▶ Viviotech Website

ACCOUNT SUMMARY

Outstanding Invoices

Active Services

Step 3: Select "Edit" on the line to the right of the contact. A new pop-up will open.

Contacts [ADD CONTACT](#) View: Active Contacts

Contacts 1-3 of 3 Shown ([Download CSV File](#))

ID	Name	Title	Phone	Email	Security Code	
3522	Joe Example	Primary Contact	000-000-0000	marketing@viviotech.net		edit deactivate
3523	Contact Example		000-000-0000	marketing@viviotech.net		edit deactivate
3526	Contact Example 2					edit deactivate

Contacts 1-3 of 3 Shown

Step 4: In the new pop-up that has opened, select the "Permissions" tab at the top.

Edit Contact

[Contact Details](#)[Login & Password](#)[Permissions](#)[Unlock](#)[Custom Fields](#)

Name: *

Email: [edit](#)

Title:

Phone:

Audit Account: ☐ ?

RWhois Roles: ☐ POC

☐ Tech

Step 5: Click the arrow beside "Client Profile" to expand and view more options.

Filter resources:

() shows inherited value

Resources	View	Create	Update	Delete
Client Portal	(None) ▾	(None) ▾	(None) ▾	(None) ▾
▼ Client Profile	Inherit ▾	Inherit ▾	Inherit ▾	Inherit ▾
Profile	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Payment Methods	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Change Password	(Inherit) ▾	-	(Inherit) ▾	-
Manage Contacts	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Manage Contact Facility Access	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
► Billing & Services	Inherit ▾	Inherit ▾	Inherit ▾	Inherit ▾

Step 6: On the "Profile" line, under "View," **select** "Allow." This change gives this user permission to view the account profile page.

Edit Contact

Any Company Client ID: 1707

Contact Details Login & Password **Permissions** Unlock Custom Fields

Filter resources:

() shows inherited value

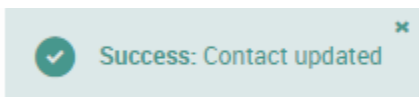
Resources	View	Create	Update	Delete
Client Portal	(None)	(None)	(None)	(None)
▼ Client Profile	Inherit	Inherit	Inherit	Inherit
Profile	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Payment Methods	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Change Password	(Inherit)	-	(Inherit)	-
Manage Contacts	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Manage Contact Facility Access	(Inherit)	(Inherit)	(Inherit)	(Inherit)
► Billing & Services	Inherit	Inherit	Inherit	Inherit

Step 7: Select "Update" to save these changes. The pop-up will close.

Manage Contact Facility Access	(Inherit)	(Inherit)	(Inherit)	(Inherit)
► Billing & Services	Inherit	Inherit	Inherit	Inherit
► Reports	Inherit	Inherit	Inherit	Inherit
► Domain Management	Inherit	Inherit	Inherit	Inherit
► Support	Inherit	Inherit	Inherit	Inherit
► Vivitech Website	Inherit	-	-	-
► Client Preferences	Inherit	Inherit	Inherit	Inherit

Update Cancel

Step 8: A message will appear at the top of your screen. "Success: Contact updated." This user is now able to view the account-wide security code. Repeat these steps for each additional user.



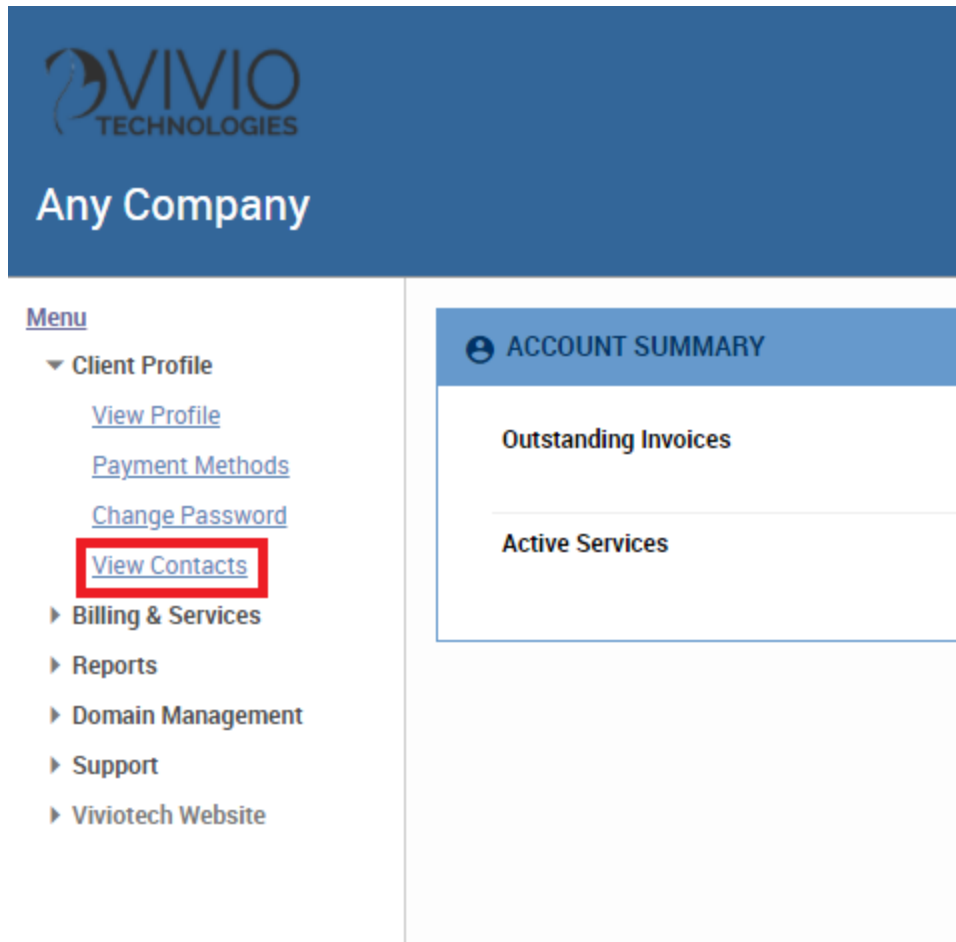
If you need any help changing the permissions for your account-wide security code, please [get in touch](#) with our Support team.

Creating individual codes for your other users

Follow these steps to create a unique security code for a user on your account.

Step 1: Log in to the [Vivio Client Portal](#).

Step 2: Under "Client Profile," **select** "View Contacts."



Step 3: Select "Edit" to the right of the contact listing. A new pop-up will open.

Contacts [ADD CONTACT](#) View Active Contacts

Contacts 1-3 of 3 Shown ([Download CSV File](#))

ID	Name	Title	Phone	Email	Security Code
3522	Joe Example	Primary Contact	000-000-0000	marketing@viviotech.net	edit deactivate
3523	Contact Example		000-000-0000	marketing@viviotech.net	edit deactivate
3526	Contact Example 2				edit deactivate

Contacts 1-3 of 3 Shown

Step 4: In the new pop-up that opens, **select** the "Custom Fields" tab at the top.

Edit Contact

Contact Details

Login & Password

Permissions

Unlock

Custom Fields

Name: *

Contact Example 2

Email:

edit

Title:

Phone:

Audit Account:

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RWhois Roles:

☐ POC

☐ Tech

Step 5: Select a new Security Code and **type** it in. (A minimum of eight characters is required. Do not use personally identifiable information such as your Social Security number or date of birth.)

Edit Contact

Contact Details

Login & Password

Permissions

Unlock

Custom Fields

Account Verification

Security Code:

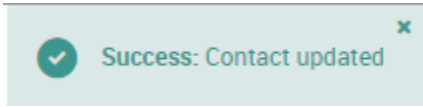
?

Step 6: Select "Update" on the bottom right-hand corner. The pop-up will close.

Update

Cancel

Step 7: A message will appear at the top of your screen. "Success: Contact updated." This security code is now ready for use! (Be sure to let this user know what it is!) Repeat these steps for each additional user.



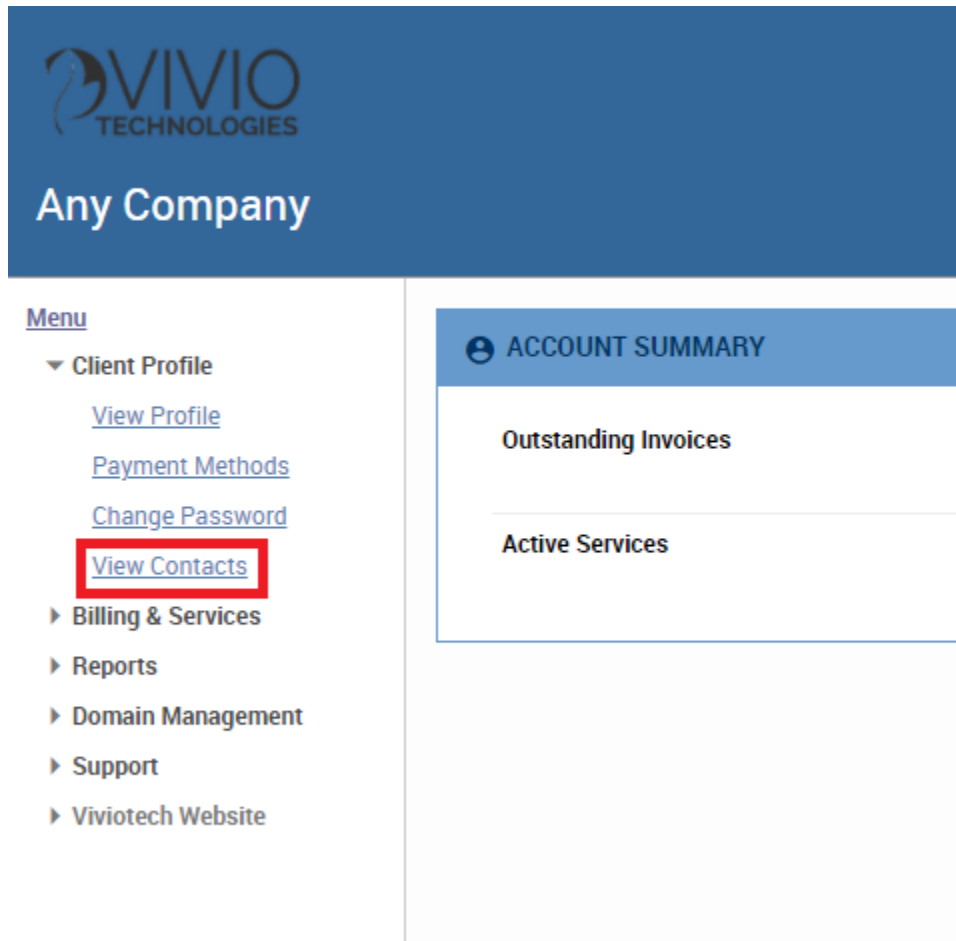
If you need any help creating or changing a security code for a user on your account, please [get in touch](#) with our Support team.

Changing permissions for your other users

Follow these steps for a user to be able to view or edit their unique code.

Step 1: Log in to the [Vivio Client Portal](#).

Step 2: Under "Client Profile," **select** "View Contacts."



Step 3: Select "Edit" to the right of the contact listing. A new pop-up will open.

Contacts [ADD CONTACT](#) View Active Contacts

Contacts 1-3 of 3 Shown (Download CSV File)

ID	Name	Title	Phone	Email	Security Code
3522	Joe Example	Primary Contact	000-000-0000	marketing@viviotech.net	edit deactivate
3523	Contact Example		000-000-0000	marketing@viviotech.net	edit deactivate
3526	Contact Example 2				edit deactivate

Contacts 1-3 of 3 Shown

Step 4: In the new pop-up that has opened, **select** the "Permissions" tab at the top.

Edit Contact

[Contact Details](#)[Login & Password](#)[Permissions](#)[Unlock](#)[Custom Fields](#)Name: * Email: [edit](#)Title: Phone: Audit Account: ☐ ?RWhois Roles: ☐ POC☐ Tech

Step 5: Click the arrow beside "Client Profile" to expand and view more options.

Filter resources:

() shows inherited value

Resources	View	Create	Update	Delete
Client Portal	(None) ▾	(None) ▾	(None) ▾	(None) ▾
▼ Client Profile	Inherit ▾	Inherit ▾	Inherit ▾	Inherit ▾
Profile	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Payment Methods	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Change Password	(Inherit) ▾	-	(Inherit) ▾	-
Manage Contacts	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
Manage Contact Facility Access	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾	(Inherit) ▾
► Billing & Services	Inherit ▾	Inherit ▾	Inherit ▾	Inherit ▾

Step 6: On the "Manage Contacts" line, **select** "Allow" in the "View" and "Update" columns, as shown below. These changes allow this user to view and update information in the "Contacts" section.

Edit Contact

Any Company Client ID: 1707

Contact Details
Login & Password
Permissions
Unlock
Custom Fields

Filter resources:

() shows inherited value

Resources	View	Create	Update	Delete
Client Portal	(None)	(None)	(None)	(None)
▼ Client Profile	Inherit	Inherit	Inherit	Inherit
Profile	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Payment Methods	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Change Password	(Inherit)	-	(Inherit)	-
Manage Contacts	1 Allow	(Inherit)	2 Allow	(Inherit)
Manage Contact Facility Access	(Inherit)	(Inherit)	(Inherit)	(Inherit)
► Billing & Services	Inherit	Inherit	Inherit	Inherit
► Reports	Inherit	Inherit	Inherit	Inherit

Step 7: Select "Update" to save these changes. The pop-up will close.

Manage Contact Facility Access	(Inherit)	(Inherit)	(Inherit)	(Inherit)
► Billing & Services	Inherit	Inherit	Inherit	Inherit
► Reports	Inherit	Inherit	Inherit	Inherit
► Domain Management	Inherit	Inherit	Inherit	Inherit
► Support	Inherit	Inherit	Inherit	Inherit
► Vivitech Website	Inherit	-	-	Inherit
► Client Preferences	Inherit	Inherit	Inherit	Inherit

Update

Cancel

Step 8: A message will appear at the top of your screen. "Success: Contact updated." This user can now view and update their security code. Repeat these steps for each additional user.

✓

Success: Contact updated

✕

If you need any help updating permissions for the other users on your account, please [get in touch](#) with our Support team.

Related articles

- [How to Preview a Domain by Modifying your Hosts File](#)
- [How to Lock down Your WordPress Login Page](#)
- [Accepted Payment Methods](#)
- [How to add or manage a credit card on file](#)
- [How to add two-factor authentication to your Vivio Portal account](#)