BDO

Multi-factor Authentication Client Enrollment

Contents

Introduction

When you sign into your online accounts, you're proving to the service that you are who you say you are. Traditionally that's been done with just a username and a password, however as criminals get smarter, so do the methods for protecting and proving your identity. Most online services like banks and social media, have added a way for accounts to be more secure. Multi-factor Authentication or MFA is used when you sign into the account for the first time on a new device or app (like a web browser). This extra security step is a way to confirm your identity when you sign in.

In this guide, we outline how to set up MFA to utilize BDO's hosted services.

HOW TO REQUEST MORE INFORMATION OR ASSISTANCE

If your company or organization has any questions about the experience or Multi-Factor Authentication (MFA), we have several ways for you to get assistance:

▶ Fill out the **"Need Assistance or Help?" Form**

▶ By phone at 1-800-546-2191 / M-F 9:00 am to 5:00 pm ET

Enrollment

NEW USER

The following information describes the most typical experience when accessing BDO USA hosted services for the first time.

Email invitation

These next steps should be done from your computer, not your mobile device.

▶ To utilize and collaborate with BDO USA provided services, such as Client Portals or background checks or restricted entities, you will receive an email invitation to set up your account
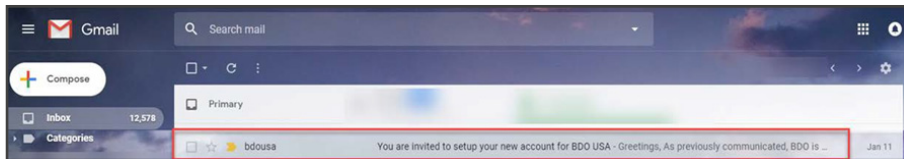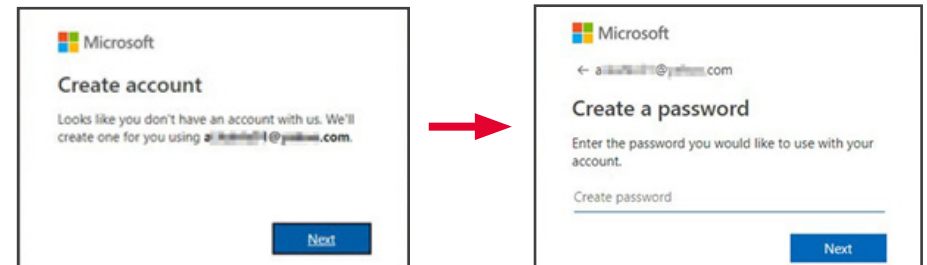

▶ In the email invitation, click on the "Get Started" button. You may log in or create an account using the same email address that received the invitation.
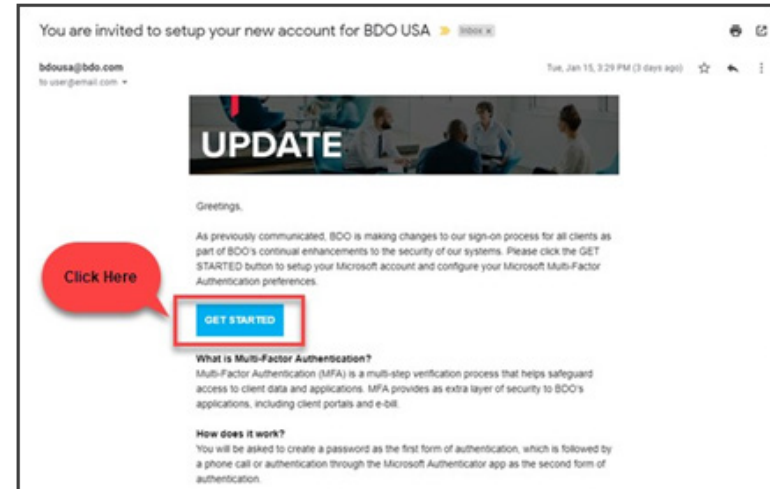

CREATING AN ACCOUNT

▶ If you do not have an existing Microsoft Account (personal) or Azure AD/O365 Account (work or school), you will need to create an account following the Microsoft account creation wizard.

▶ After providing a password, you will need to prove your identity by entering a code that will be sent to your email address. Enter the code and click "Next". You may also subscribe to Microsoft promotional emails, as well as read Microsoft's Terms of Service here.
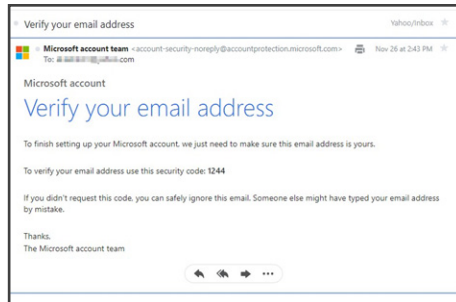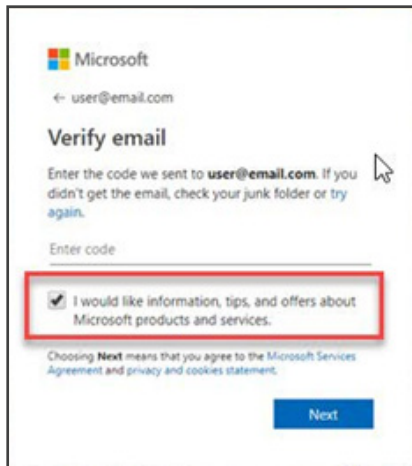

▶ Follow the prompts to verify you are not a robot and verify the security information is still accurate. Clicking "Looks Good!" completes the Microsoft account creation.
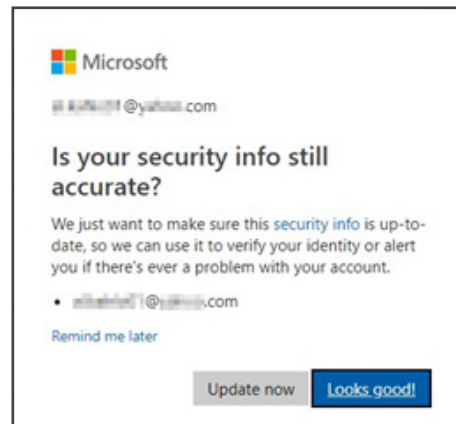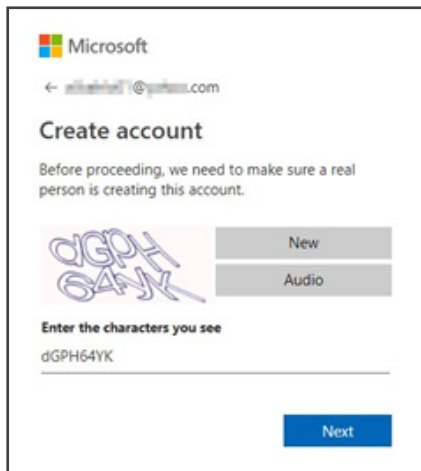
PERMISSIONS AND TERMS

▶ With your account created, you will be asked to confirm that BDO USA will be allowed to perform specific actions and retrieve specific account information. Please click "Accept" to continue. You will also have a chance to review the Terms and Conditions of BDO USA at this time.

Please note: BDO only has access to view your email address, not the contents.
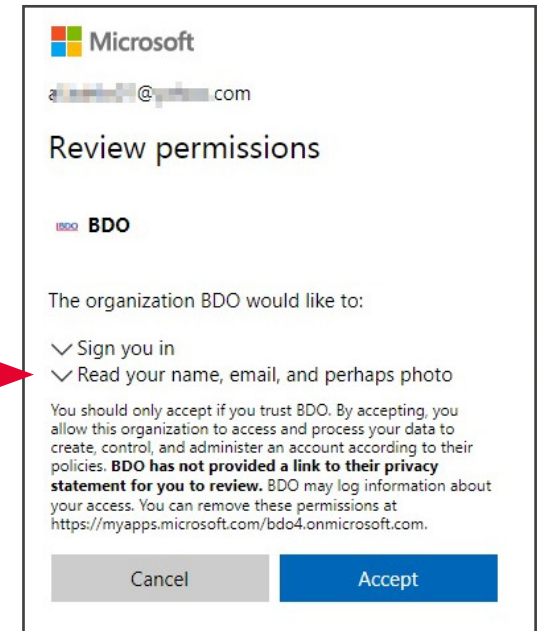
SET UP MULTI-FACTOR AUTHENTICATION (MFA)

The screen below will appear when MFA has not been configured or has been reset.

▶ Click the 'Next' button to proceed with enrollment, where the following screen will be presented with the various options for adding this additional security to the account.
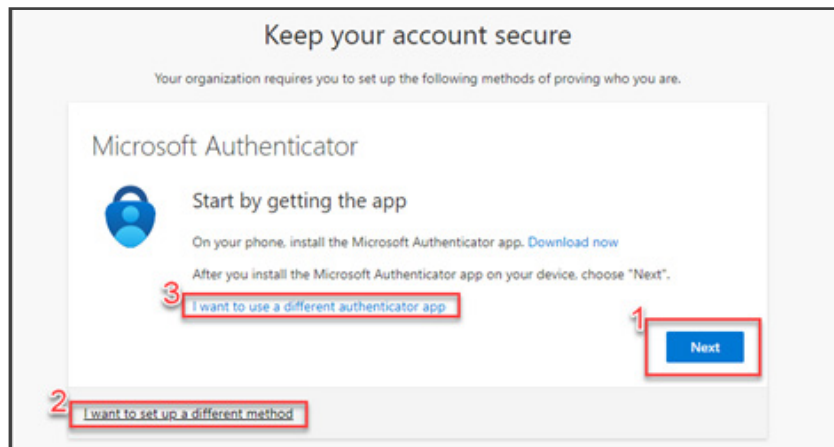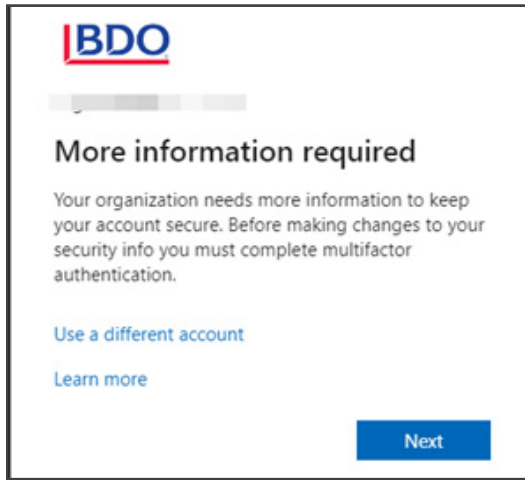

▶ Choose one of the buttons indicated above based on the best or most convenient method of approving login requests for your account.

- Using the Microsoft Authenticator App to receive notifications on a mobile device to approve login requests.
- To use phone call authentication, choose the 'I want to set up a different method' option to change over to the phone-based approval. Text message authentication is not supported for BDO.com accounts.
- (Advanced) To set up a third-party authenticator app such as YubiKey, Authy, etc. or if you require the ability to complete MFA without an internet connection choose the 'I want to use a different authenticator app' option.

The process for enrollment in each of these methods can be found under the appropriate header below.

Microsoft Authenticator App

▶ If needed, install the Microsoft Authenticator app as instructed Once the app is installed, press the 'Next' button to begin setup.

▶ If the Microsoft Authenticator app is already in use, add an additional account to the app via the + button indicated below.
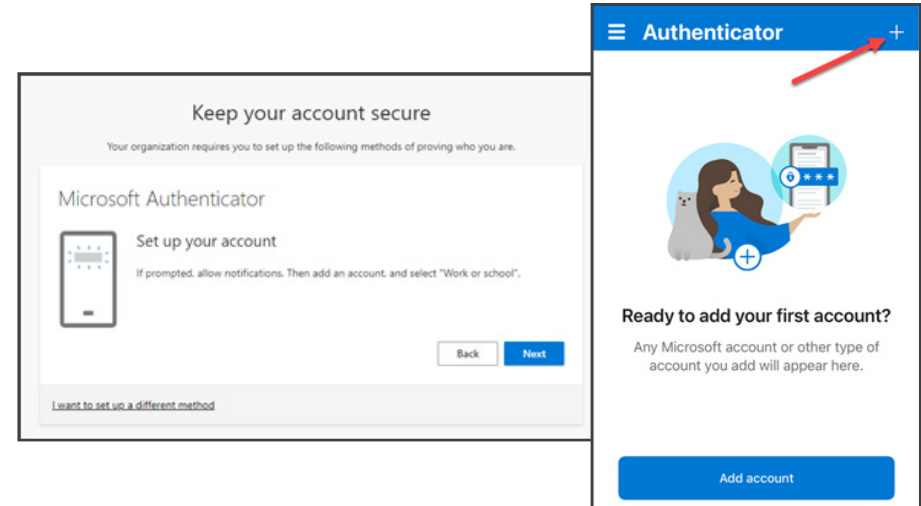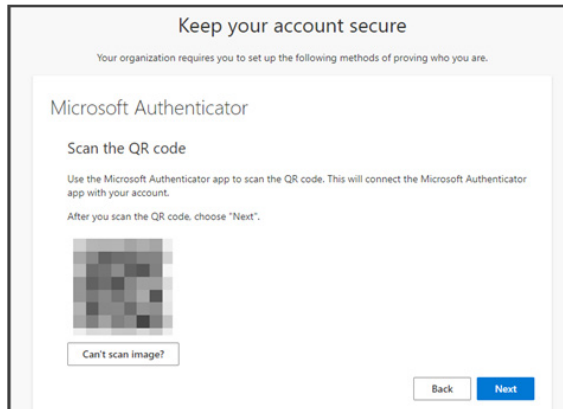
▶ When prompted, choose 'Work or School account' from the available options.
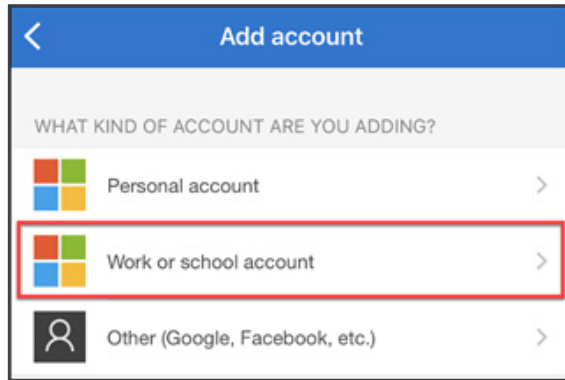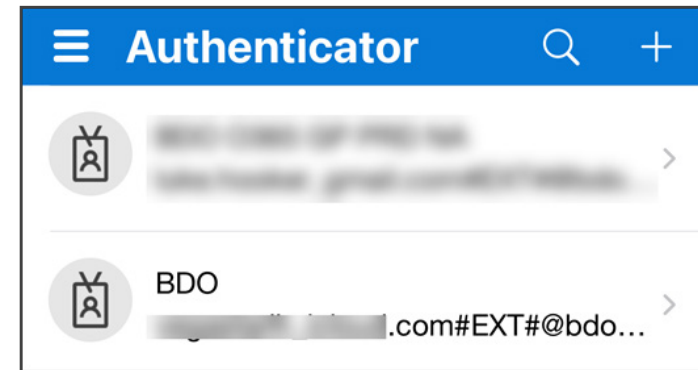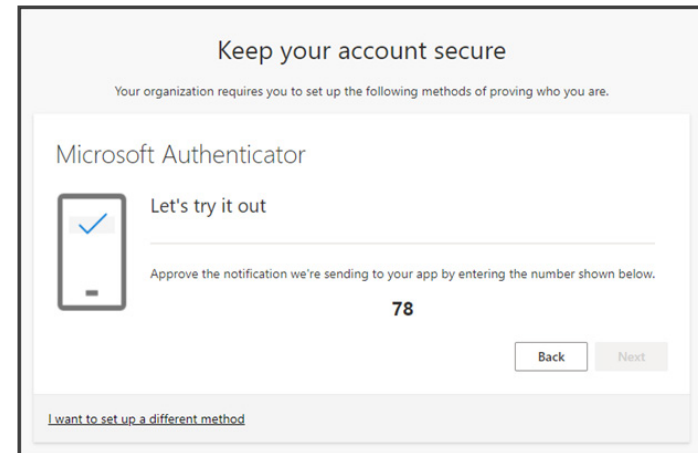

▶ Choose to scan a QR Code when prompted.
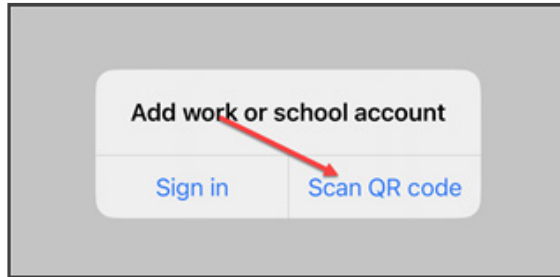
▶ On the MFA setup screen, choose the 'Next' button to display the QR code for setup.

▶ Scan this code with the mobile device to complete the setup and a new entry for BDO will appear in the mobile app.

▶ Once this appears in the mobile app, choose 'Next' on the setup screen to perform a test to ensure the app is working correctly.

► Input the verification code provided to the mobile app to complete the sign in process. Once confirmed, choose 'Next.'
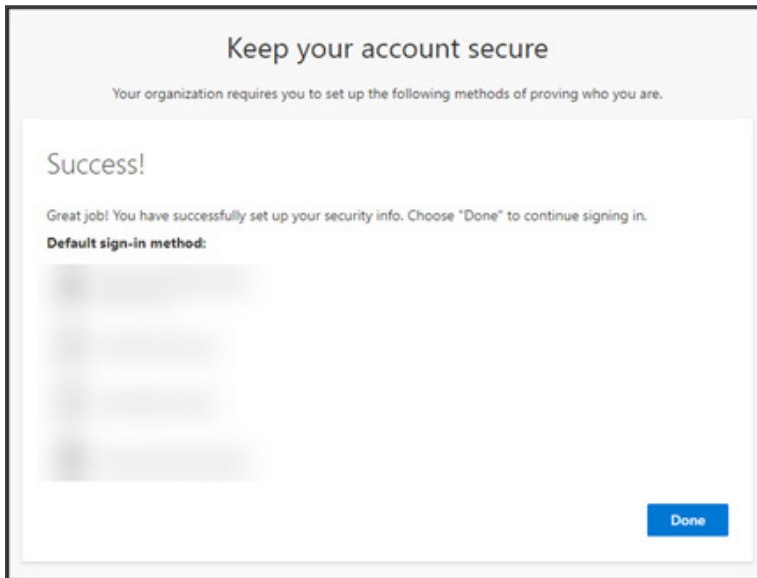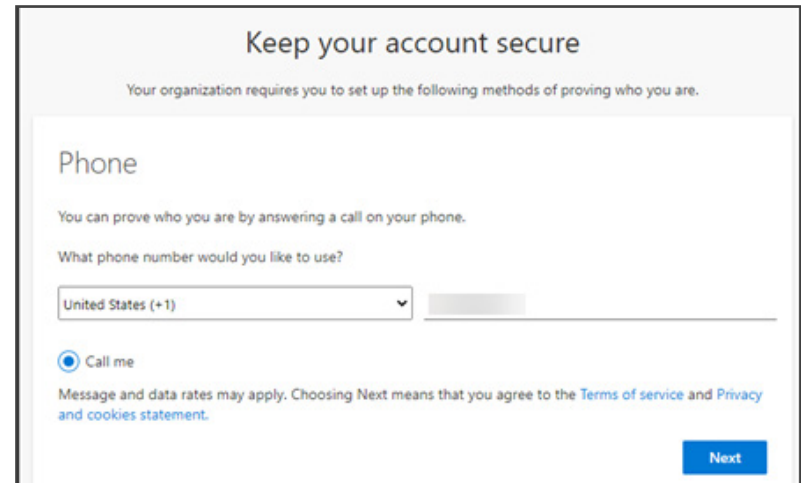

► Select 'Done' to complete the enrollment.

Phone Call Authentication

► To use phone call authentication, choose the 'I want to set up a different method' text and choose 'Phone' from the dropdown, then press the 'Confirm' button.

► In the next prompt, choose the appropriate country code and enter a phone number to be used for the verification call.

► Once the country code and phone number have been entered, choose 'Next.'

► You will receive a phone call from one of the following numbers: 866-539-4191, 855-330-8653, or 877-668-6536. Answer the incoming call and press the # key to complete the verification.

• If the call is not coming through, these numbers may need to be added as a contact or unblocked in spam call filtering depending on phone configuration. Typically, adding a contact with those three numbers will bypass most spam filters.

• Once the approval has been completed successfully, a confirmation screen will appear. Choose 'Next' to confirm the settings, then 'Done' complete the enrollment.
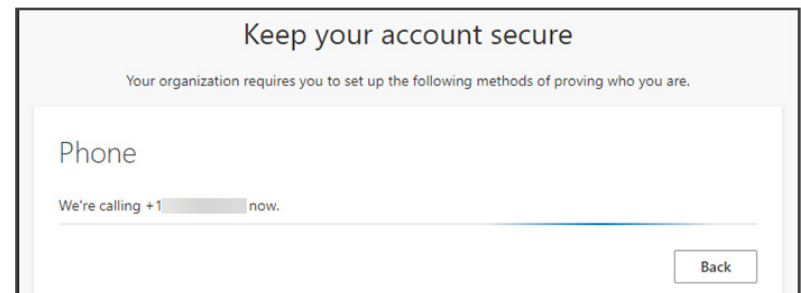
Third-Party Authentication App

▶ As there are many different third-party options for MFA, please consult with your specific application's documentation for instructions to add an additional account.

▶ In general, when this option is selected you will be presented with a QR code to set up the account.

▶ Choose 'Next' once the account has been configured and input the code displayed to complete the authentication.
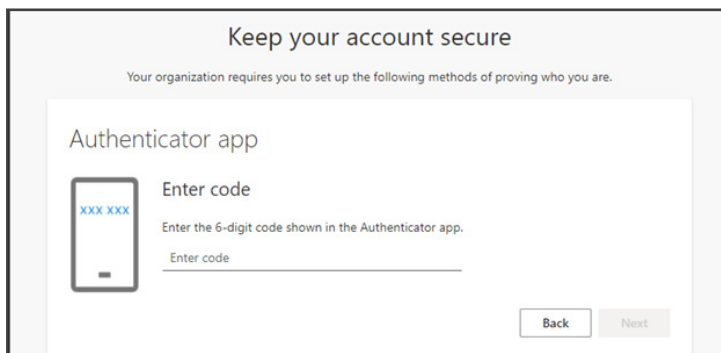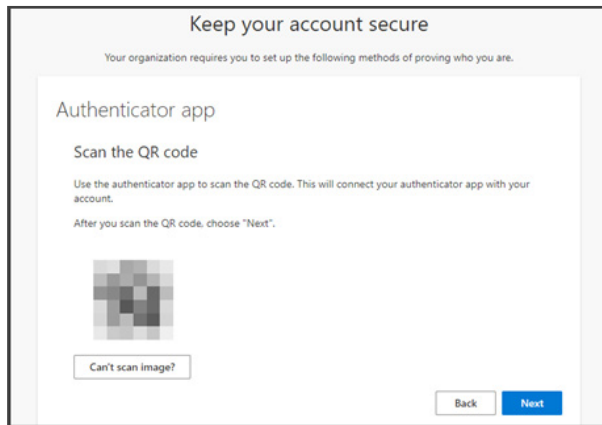
▶ Choose 'Next' to confirm settings and complete the enrollment.

▶ If you need assistance with setting up MFA or need to have the configuration on your bdo.com account reset due to replacing a phone, new phone number etc., please contact the BDO Client Support help desk at 800-546-2191 from 9:00 am to 5:00 pm EST Monday through Friday.

DELIVERY TO APPLICATION

▶ You may be asked to confirm your login username (email address) by clicking on it as part of the sign-in process to the application.

▶ If you are not asked, you will automatically be taken to the application you were linked to.

▶ Before the application loads, you will receive an MFA challenge. The application will load after you've approved the login or entered the code (depending on your chosen method of authentication).

OTHER EXPERIENCES

The previously described steps are the most typical for first time sign-in, but the following factors may change that process.

▶ **Existing Microsoft Account (Personal/Free):** If you choose to use an existing account or are directed to do so by your company/organization, you will skip the "creating an account" steps.

▶ **Your company/organization utilizes Microsoft cloud services:** If you have a corporate-class account with Microsoft (often referred to as a "Microsoft Work or School account"), you will skip the "creating an account" steps and might skip the "Setup Multi-Factor Authentication" steps. Depending on your account, your IT department may also need to enable your account to share information with BDO USA.

Existing Microsoft Accounts

We have identified common issues for those who have existing Microsoft Accounts when accessing BDO Global and BDO USA systems. These issues are listed below:

▶ Not realizing you have an existing Microsoft account:

- Many do not realize they have a Microsoft account when attempting to join the BDO organization. (Using the invitation URL provided in invitation emails.)

- When you get to the Microsoft account screen and put in your email address, the system will automatically prompt you to put in a password if your email address is already associated with a Microsoft account.

- On the password screen, try your standard password or click the "Forgot my password" option.

- Depending on how your organization has setup your Microsoft accounts, you may get different error messages (see the example screenshot to the right) when trying to recover your password.

- When trying to recover a password (or attempting to log in) the error message will often involve the phrase "your organization". These key words are an indicator that you have an existing Microsoft Account setup through your organization. Helpful tips:

  – Do you use Office 365 or Microsoft Online? If the answer is yes, or I don't know, try logging in with your email and password that you use to log in to your email or computer. If your log in is successful, you can continue the MFA setup process.

  – If you are unable to log in, then we recommend contacting your IT department and indicate that you are trying to login to a BDO USA system that requires a Microsoft Login.
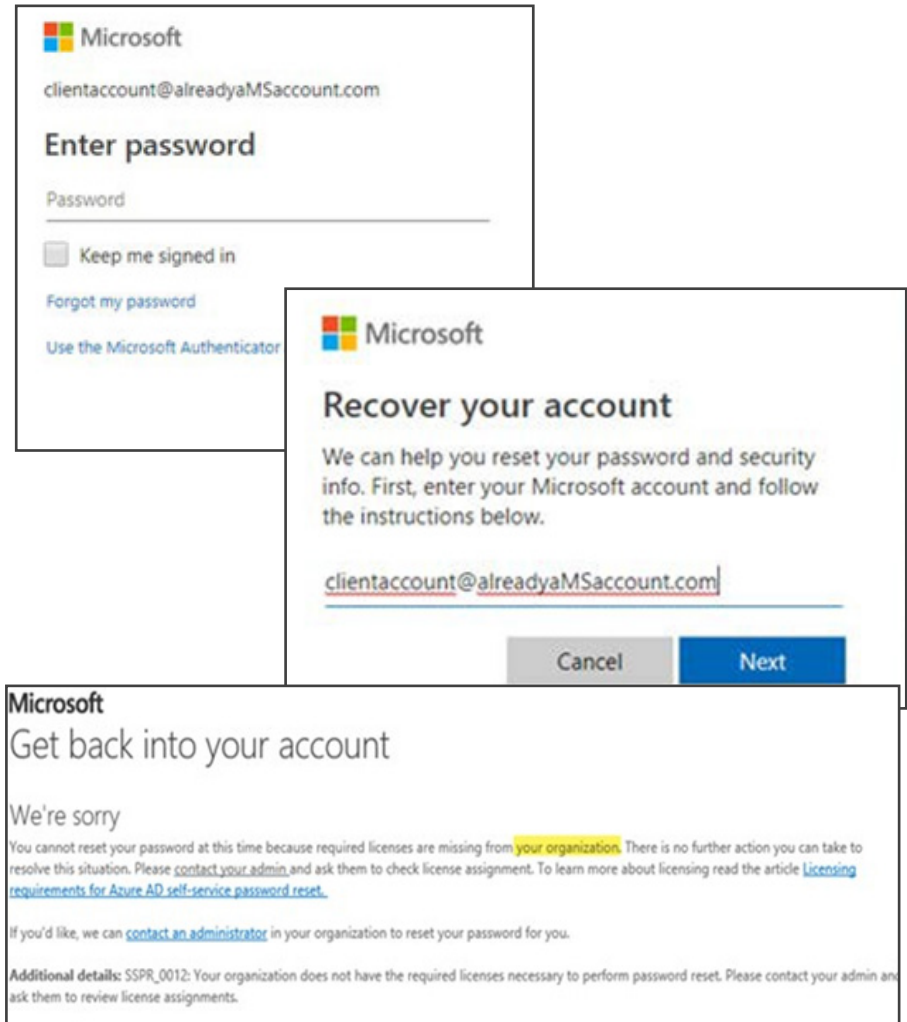
▶ You have a Microsoft Account but the username is not your email address:

- It is possible for invited clients to have an existing account with Microsoft, but their usernames are not their email addresses. This happens when the client organization is transitioning to Microsoft for authentication.

- If you are unable to recover your password or move past entering your email address as the username:

  – Do you currently use Office 365 or Microsoft Online? If so, do you login to Office 365 or Microsoft Online with another username other than your email address?

    - If your username is different than your email address, BDO will need to invite the username used to log in. Once the invitation is complete, you will be able to login within your alternate username and current password defined by your company.

    - You can request an invitation be resent with a different email address via the **Need Assistance or Help? form**.