Enrollment Experience - How to Request More Information or Assistance

If your company or organization has any questions about the experience or MFA, we have several ways for you to get assistance:

Please fill out the “Need Assistance or Help?” Form located HERE

We have set up a dedicated phone number:

• 1-800-546-2191 / M-F 9:00 am to 5:00 pm ET
• If all agents are on the phone or away, the call will be queued for 4 minutes and then you will be routed to voicemail. Please leave:
  ➢ Your name, phone number and company name, and a brief DETAILED description of the issue you are experiencing
Enrollment Experience - New User

The following slides describe the most typical experience when accessing BDO USA hosted services for the first time.
Enrollment Experience - Email Invitation

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

You will be invited, via email, to the BDO USA tenant in order to collaborate and utilize BDO USA provided services (such as Client Portals or eBilling).
Enrollment Experience - Email Invitation (cont.)

Upon opening the email, you will be presented with your invitation to the information system resource. By clicking the “Get Started” button, you may log in or create an account using the same email address that received the invitation.
Enrollment Experience - 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. You will enter the code from the email and click “**Next**”. You may also subscribe to Microsoft promotional emails, as well as read Microsoft’s Terms of Service here.
Enrollment Experience - Creating an Account (cont.)

You will then need to **verify your humanity via a provided challenge.** Upon completing the challenge, the wizard will request verification that the email account used is also a good account for security fallback and recovery. Clicking **“Looks Good!”** completes the Microsoft account creation.
Enrollment Experience - 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.
Enrollment Experience - Set up Multi-Factor Authentication (MFA)

Before accessing the application, you will need to set up MFA. You will see a screen that says, “More information required”. By clicking “Next”, you will then begin to follow the wizard to set up MFA.
Enrollment Experience - Set up Multi-Factor Authentication (cont.)

The wizard will first ask how you want to receive verification requests. BDO National IT highly recommends the “Mobile App” method. Make your selection and click on “Set up”.

![Additional security verification](image1.png)

![Additional security verification](image2.png)
Enrollment Experience - Set up Multi-Factor Authentication (cont.)

A pop-up step-by-step guide is provided. Once complete, clicking “Next” verifies that the setup was done correctly. Then click “Next” to confirm your verification method.

In this configure mobile app section, you will be pointing your camera from your mobile device at the QR code on your computer screen (not at the screenshot below)
Enrollment Experience - Set up Multi-Factor Authentication (cont.)

A test verification challenge is presented. On the mobile device, you will need to tap “Approve” (or enter the code shown). Once complete, click “Next” and you will be asked for a telephone number as a backup method. Enter the telephone number, and then click “Done”.

![Microsoft Additional security verification]

**Additional security verification**

Secure your account by adding phone verification to your password. View video to know how to secure your account.

**Step 2: Let’s make sure that we can reach you on your Mobile App device**

Please respond to the notification on your device.

**Step 3: In case you lose access to the mobile app**

United States (+1)

Your phone numbers will only be used for account security. Standard telephone and SMS charges will apply.
Enrollment Experience - 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
Enrollment Experience - Other Experiences

The previously described experience was the most typical for first time sign-in, but some factors may cause you to have an altered experience.

- You have an existing Microsoft Account (*Personal/Free*) that you choose to use or are directed to do so by your company/organization leadership or IT department. You will skip the “creating an account” steps, in this case.

- Your company/organization utilizes Microsoft cloud services (*such as Office 365*) and 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 may possibly skip the “Setup Multi-Factor Authentication” steps. Your IT department may also need to enable your account to share information with BDO USA.
Existing Client Microsoft Accounts - Known Issues

We have identified several issues with our Clients who have existing Microsoft Accounts when accessing BDO Global and BDO USA systems. These issues are listed out below:

I. Not Realizing You Have an Existing Microsoft Account

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

Here is the scenario: 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 because your email address is already associated with a Microsoft account.
Existing Client Microsoft Accounts - Known Issues

Most of you are getting the password screen and proceed to either try one of your standard passwords or will try the “Forgot my password” option.

![Password Screen](image-url)
Existing Client Microsoft Accounts - Known Issues

Depending on how your Organization has setup your Microsoft accounts you may get a number of different error messages (see the example screenshot below) when trying to recover your password.

![Microsoft Error Message](image-url)
Existing Client Microsoft Accounts - Known Issues

The “error” you will get when trying to recover your password (or attempting to log in) will usually involve the following phrase “your organization”. These key words are a great indicator that you have an existing Microsoft Account setup through your Organization. Here are some tips that should help:

a. **Do you use Office 365 or Microsoft Online?** If the answer is *yes*, or I don’t know, you should be able to login with your email address and the password you use to login to your email or your computer. In this situation, if you can enter in the password associated with your existing Microsoft Account, you will be able to successfully login and continue the setup process.

b. **If you are unable to obtain your password through currently used passwords for the existing system you use**, then you should contact your IT department and indicate that you are trying to login to a BDO USA system and it requires a Microsoft Login.
Existing Client Microsoft Accounts - Known Issues

II. 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 will usually happen when the client organization is transitioning to Microsoft for Authentication.

- Usually the way to identify this is similar to the one above in Section I. in this document. The exception is if you are unable to recover your password due to “your organization” or you are unable to move past your email address as the username on the initial login screen:
  - The question to ask again yourself is “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 a different username is used to logged in, then this username will need to be invited to the BDO USA organization. Once the invitation is complete, you will be able to login within your alternate username and current password defined by their company.
You can request that an invitation be resent with a different email address via the Need Assistance or Help? form that's available in the Multi-Factor Authentication resources page in the Client Center on BDO.com.