

# First Time Login for Clients

## Crowe Secure Information Exchange



Crowe Secure Information Exchange (Crowe Exchange) uses Multi-Factor Authentication (MFA) to ensure your data is secure. The first time you log in to Crowe Exchange, it will require steps to set up your MFA.

On subsequent visits to Exchange, you'll have several options in which you can use MFA to login to Exchange

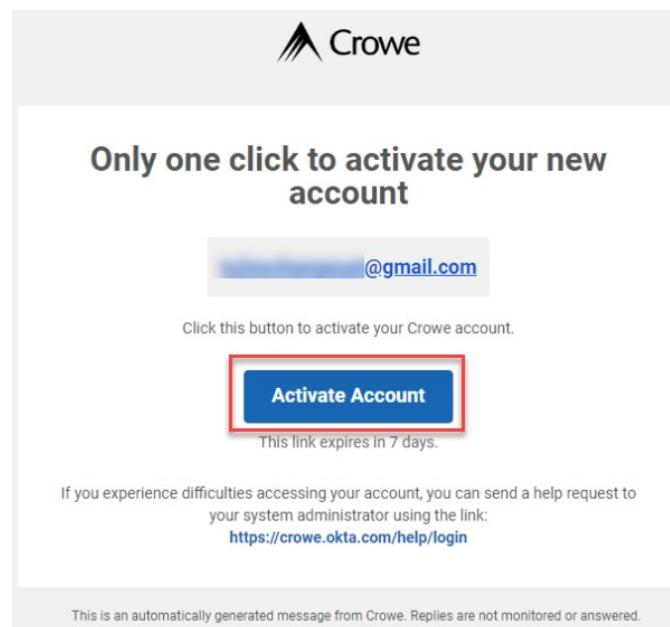
This job aid covers:

- First Time Login to Crowe Exchange
- Subsequent Login to Crowe Exchange
- Accessing Okta Admin site

### First Time Login to Crowe Exchange

1. You will receive an email [\[apps-noreply@iam.crowe.com\]](mailto:apps-noreply@iam.crowe.com) from Okta. Click on the **Activate Account** button in the email.

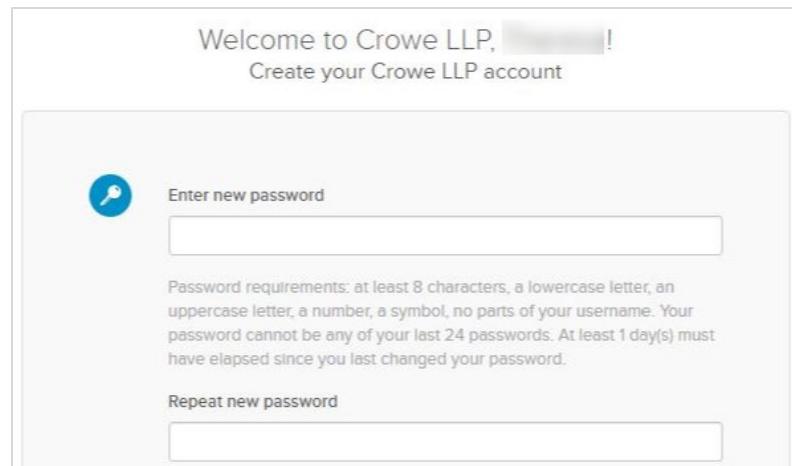
**Note:** Okta provides the MFA service for you to securely use Crowe Exchange.



2. If the **Crowe Email Redirect Page** appears, click the **Launch** button in the **Crowe Secure Information Exchange** section.

A screenshot of the Crowe Email Redirect Page. It features a "Welcome!" message, a "Crowe Email Redirect Page" section with a "Launch" button, a "Firmwide" section with a "Crowe Secure Information Exchange" box (which is highlighted with a red box and has its own "Launch" button), and a "Tax" section for "C-TRAC" with its own "Launch" button. The Crowe logo is in the top right corner.

3. The Welcome to Crowe LLP screen will appear. Type a new password in the **Enter new password** field. Then reenter it in the **Repeat new password** field.



# First Time Login for Clients

## Crowe Secure Information Exchange

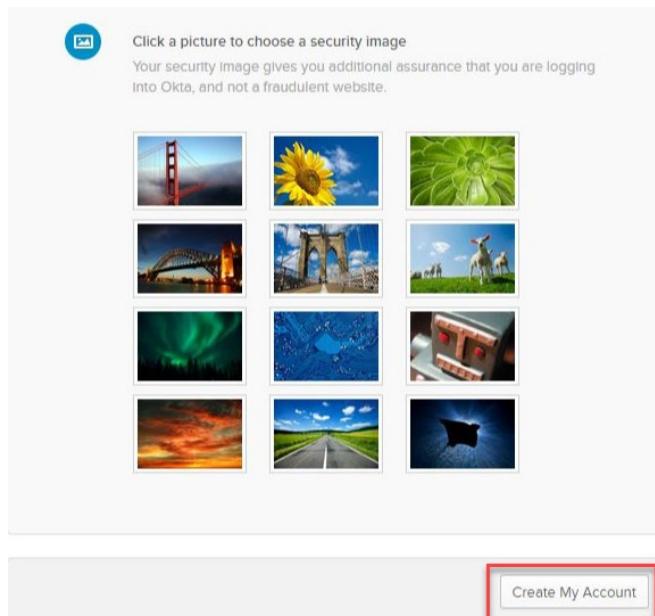


4. You will be asked to choose a security question. Type your response in the **Answer** field.



A screenshot of a web form. At the top, a lock icon and the text "Choose a forgot password question". Below is a dropdown menu with the option "What is the food you least liked as a child?". Below the dropdown is a label "Answer" and an empty text input field.

5. Click a picture to select your security image and then click **Create My Account**.



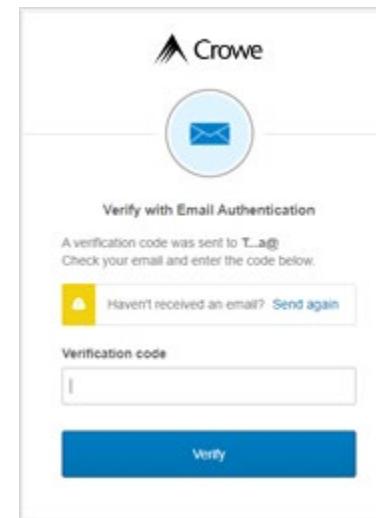
A screenshot of a web form. At the top, a lock icon and the text "Click a picture to choose a security image". Below is a sub-instruction: "Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website." Below this are nine thumbnail images arranged in a 3x3 grid. At the bottom is a "Create My Account" button, which is highlighted with a red box.

6. A **Verify with Email Authentication** box will appear. Click **Send me the code** to have the code sent to your email.



A screenshot of a web form. At the top, the Crowe logo and a circular icon with an envelope. Below is the text "Verify with Email Authentication". A message says "Send a verification code to b\_g@aol.com." Below this is a blue button with the text "Send me the code", which is highlighted with a red box.

7. Once you receive the code, type it in the **Verification code** field and click **Verify**.



A screenshot of a web form. At the top, the Crowe logo and a circular icon with an envelope. Below is the text "Verify with Email Authentication". A message says "A verification code was sent to T...a@... Check your email and enter the code below." Below this is a "Send again" button with a yellow envelope icon. Below that is a "Verification code" input field with a placeholder "Enter verification code" and a "Verify" button.

# First Time Login for Clients

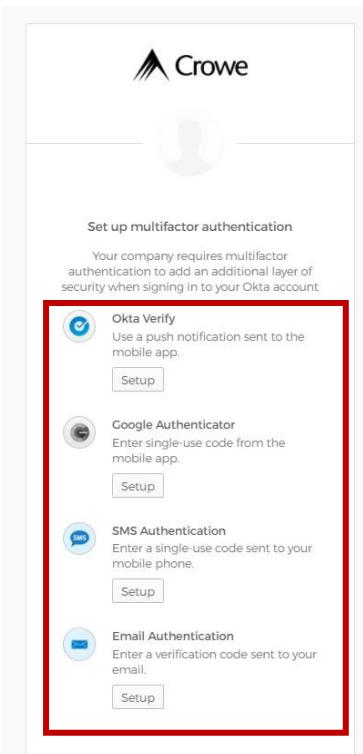
## Crowe Secure Information Exchange



### Multi-Factor Authentication Set-Up

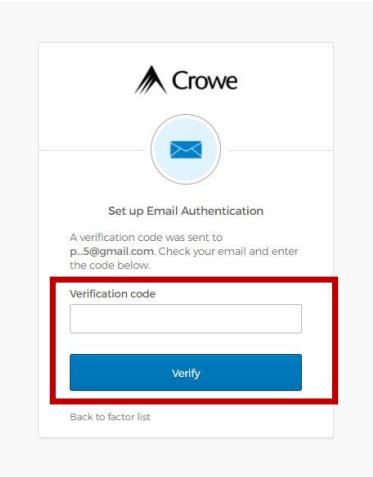
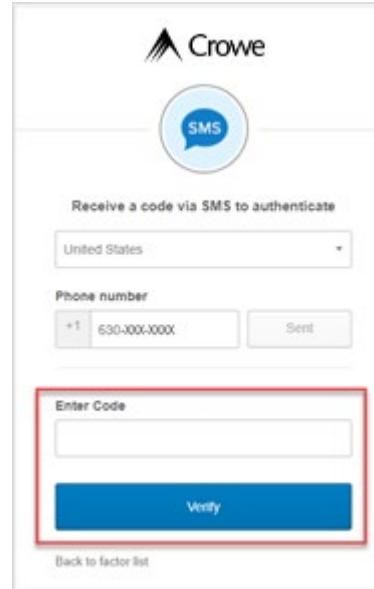
You can choose to include your mobile number or an email as a secondary MFA setting.

8. You will receive a prompt to set up a mobile phone number or, email address, Google Authenticator, or Okta Verify as a second level of security. Click on your choice of secondary MFA and then Click **Configure next factor**.



9. If you chose SMS Authentication, you'll be asked to enter your mobile phone number. If you choose Email authentication, enter your email address and click **Send Code**.

10. Once you receive the code on your mobile phone or through email, type the code in the **Enter Code** field and click **Verify**.

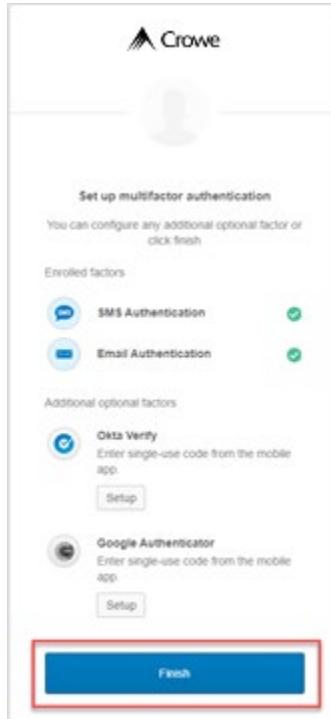


# First Time Login for Clients

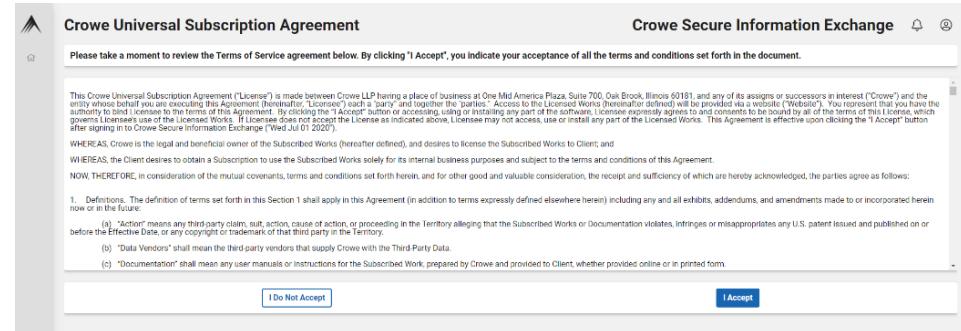
## Crowe Secure Information Exchange



11. You will receive a screen confirming that your MFA is set up. Click **Finish** and Crowe Exchange will open.



12. The **Crowe Universal Subscription Agreement** will open the first time Exchange opens. Read it and click **I Accept** to proceed.



# First Time Login for Clients

## Crowe Secure Information Exchange

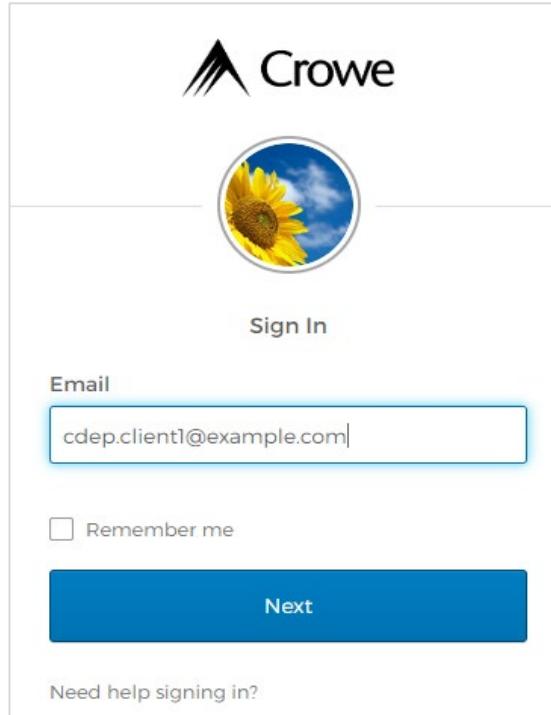


### Subsequent Login to Crowe Exchange

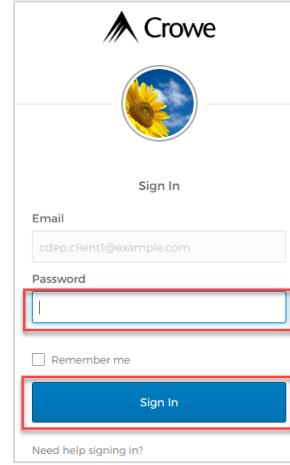
You will get an email from Crowe when you are added to a site (project).

1. Click on the link in the email and the login screen will appear. Type your email in the **Email** field and click **Next**.

**Note:** You can also login to Crowe Exchange by typing <https://secureexchange.crowe.com> in your web browser.



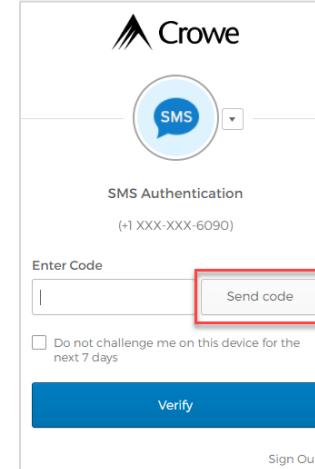
2. Type your password in the **Password** field. Then click **Sign In**.



3. Click **Send Code** to have a code sent to the mobile number you set up in MFA.

**Note:** If you want the code sent to your email that you set up in MFA, click the arrow next to SMS and select **Email Authentication**. Then select **Send me the code**.

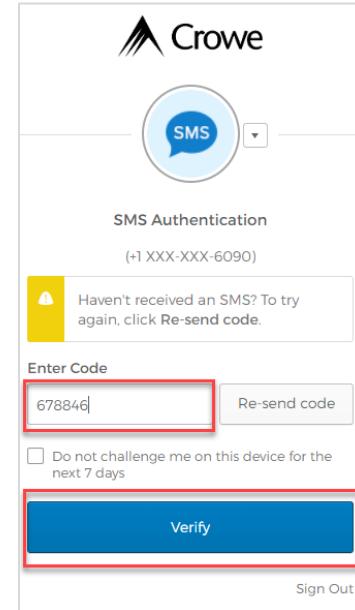
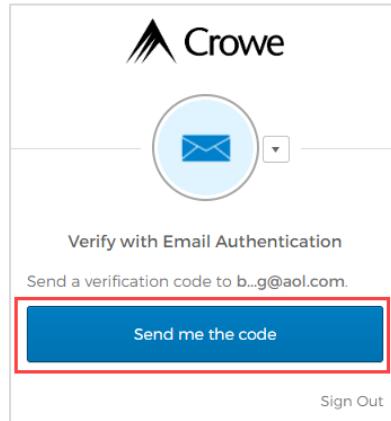
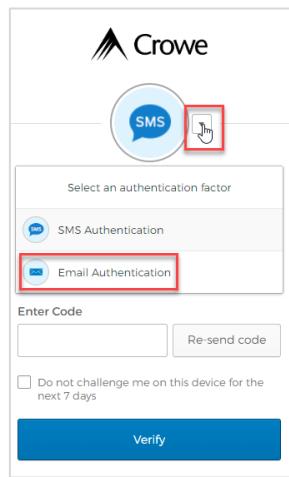
**If you choose to send a code to your mobile device, you will see:**



**If you choose to send a code to your email, you will see:**

# First Time Login for Clients

## Crowe Secure Information Exchange



- Once you receive the code, type it in the **Enter Code** field and click **Verify**.

**Note:** Click the box next to **Do not challenge me on this device for the next 7 days** if you don't want to have a code sent for 7 days. Otherwise you will be prompted to receive a code and enter a code every time you log into Crowe Exchange as part of MFA.

**Note:** Crowe Exchange will time out after 15 minutes of inactivity. You will get a pop-up with the time remaining as you get closer to the expiration time.

# First Time Login for Clients

## Crowe Secure Information Exchange



### Session Expiring Soon

After 15 minutes of inactivity, you will be logged out automatically

Time Remaining: 02:12

[Logout](#) [Extend](#)

The **Send Code** page will appear for you to log back in.

# First Time Login for Clients

## Crowe Secure Information Exchange

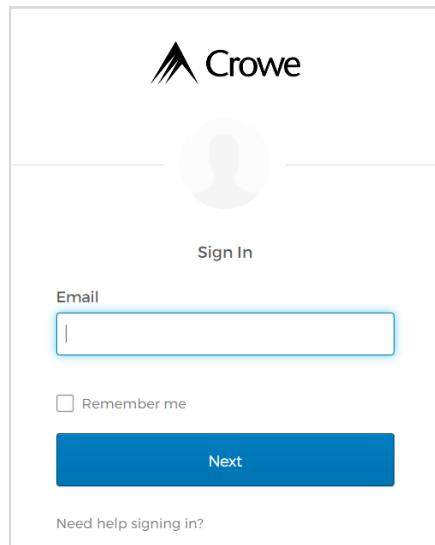


### Accessing Okta Administration Page

You can access Exchange's Okta administration site to update the following items:

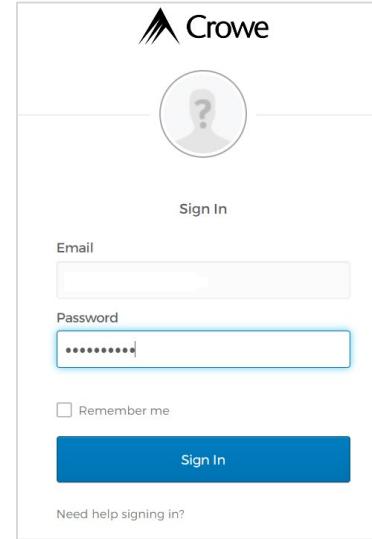
- Personal Information
- Security Image
- Extra Verification (Security Methods)
- Display language
- Change Password
- Forgotten Password Question

1. Type <https://crowe.okta.com/enduser/settings> into your preferred internet browser.
2. Enter the email address you use to login to Exchange, click **Next**.



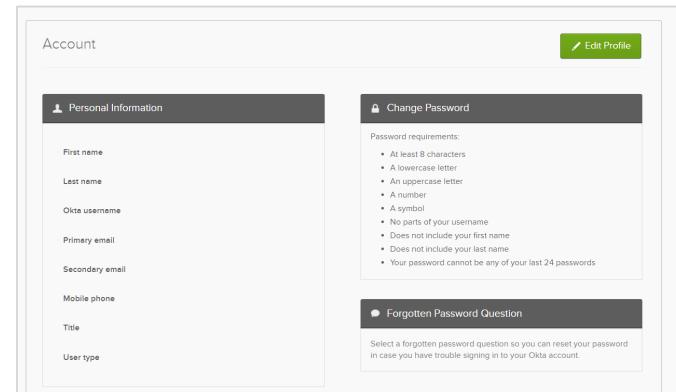
The image shows the Okta sign-in page for Crowe. It features the Crowe logo at the top left. Below it is a placeholder for a user profile picture. The word "Sign In" is centered above the input fields. The "Email" field is highlighted with a blue border, indicating it is the active field. Below the email field is a "Remember me" checkbox. At the bottom is a large blue "Next" button. A "Need help signing in?" link is located at the bottom right of the form.

3. Enter your Exchange password. Click **Sign In**



The image shows the Okta sign-in page with the "Email" field empty and the "Password" field filled with a series of dots. The "Sign In" button is highlighted with a blue background. Below the "Sign In" button is a "Need help signing in?" link.

4. From this dashboard, you'll be able to access all of your Okta security and profile settings for Exchange. You can update your profile information, password, and update your Forgotten Password Question here.



The image shows the Okta account dashboard. It has a header with "Account" and an "Edit Profile" button. The dashboard is divided into several sections: "Personal Information" (First name, Last name, Okta username, Primary email, Secondary email, Mobile phone, Title, User type), "Change Password" (Password requirements: At least 8 characters, A lowercase letter, An uppercase letter, A number, A symbol, No parts of your username, Does not include your first name, Does not include your last name, Your password cannot be any of your last 24 passwords), and "Forgotten Password Question" (Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account).

# First Time Login for Clients

## Crowe Secure Information Exchange

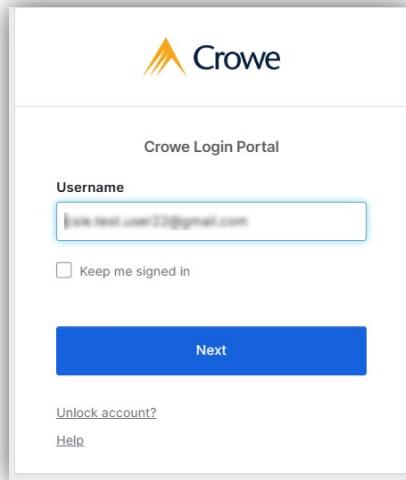


### Updating MFA Security Methods for Crowe Exchange

This guide explains how you can change your Multi-Factor Authentication (MFA) security method from email or SMS to an authenticator app (Okta Verify, Google Authenticator, or Web Authentication - FIDO2):

#### Step 1: Log in to Okta Dashboard

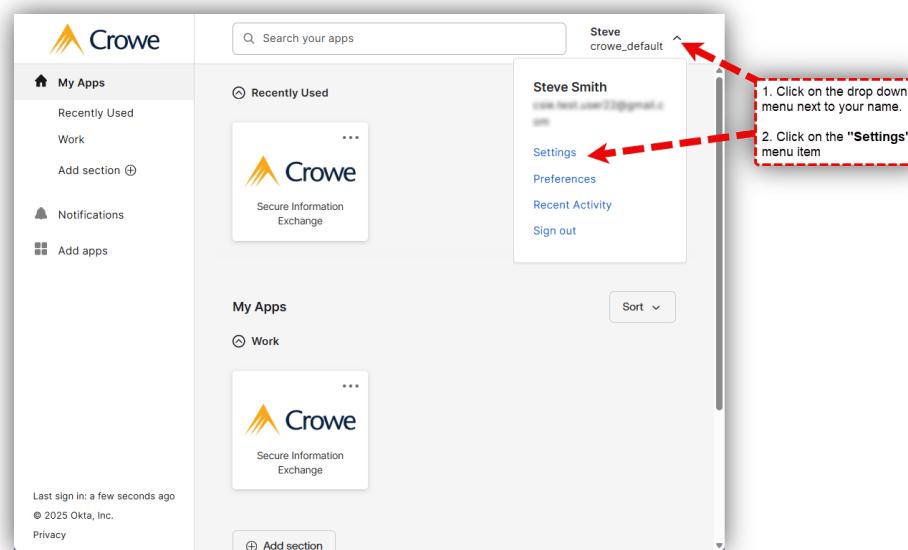
- Navigate to <https://crowe.okta.com>.
- Enter your username and click **Next**.



- Complete your verification using your existing method (SMS/Email/Authenticator App).

#### Step 2: Navigate to Your Account Settings

- Click your name in the upper-right corner of the Okta Dashboard.
- Click **Settings** from the dropdown menu.



# First Time Login for Clients

## Crowe Secure Information Exchange



### Step 3: Update Your MFA Security Method

- Under the **Security Methods** section, choose one of the following authenticator apps to set up:
  - Okta Verify
  - Security Key or Biometric Authenticator (FIDO2)
  - Google Authenticator

The screenshot shows the Okta account settings page. On the left, there's a sidebar with 'My Apps', 'Recently Used', 'Work', 'Add section', 'Notifications', and 'Add apps'. The main area shows 'Account' settings with 'Personal Information' and 'Display Language' sections. On the right, the 'Security Methods' section is displayed, listing 'Password' (Reset), 'Okta Verify' (Set up), 'Security Key or Biometric Authenticator' (Set up), 'Google Authenticator' (Set up), 'Phone' (Set up another, Remove), 'Email' (Remove), and 'Security Question' (Remove). A red box highlights the 'Set up' button for Okta Verify. A red dashed box encloses the 'Set up' buttons for Okta Verify, Security Key or Biometric Authenticator, and Google Authenticator. A callout box with a red border and red arrows points to these three buttons. The callout box contains the text: 'Click the Setup button next to your preferred security method you would like to setup to login to Crowe Exchange.'

# First Time Login for Clients

## Crowe Secure Information Exchange

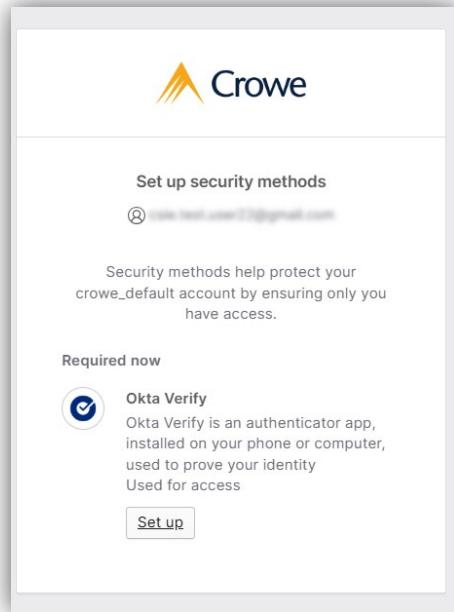


### Authenticator App Setup Instructions

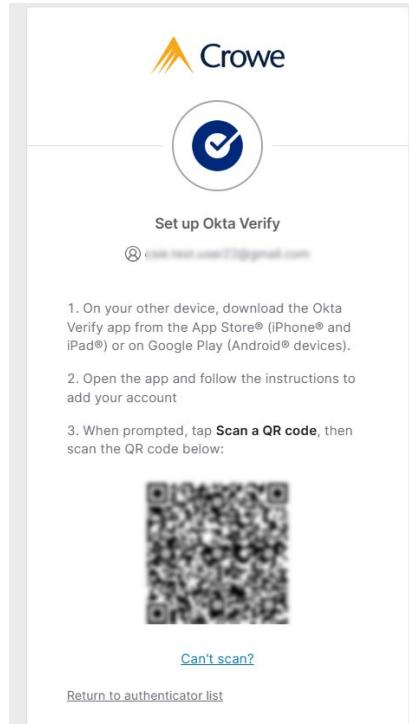
Choose one of the following authenticator apps:

#### Option A: Okta Verify

1. Click **Setup** next to **Okta Verify**.



5. Scan the provided QR code on your computer screen or enter the code manually.



6. Your Okta Verify app is now configured. You'll be prompted by the app during future logins

2. Select your device type (iPhone or Android).
3. Download the **Okta Verify app** from the app store on your mobile device.
4. Open the Okta Verify app and tap the "+" to add an account.

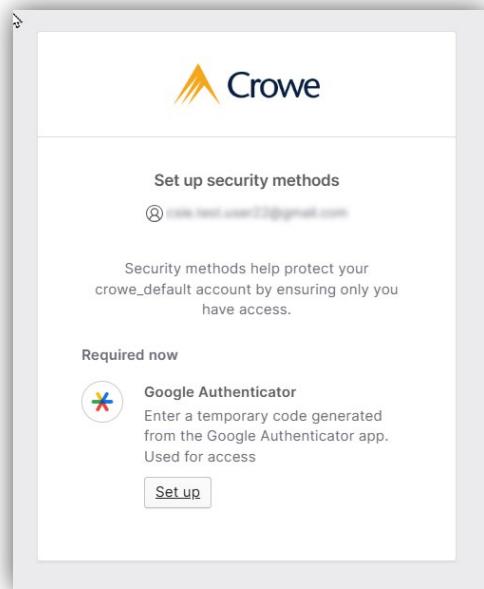
# First Time Login for Clients

## Crowe Secure Information Exchange

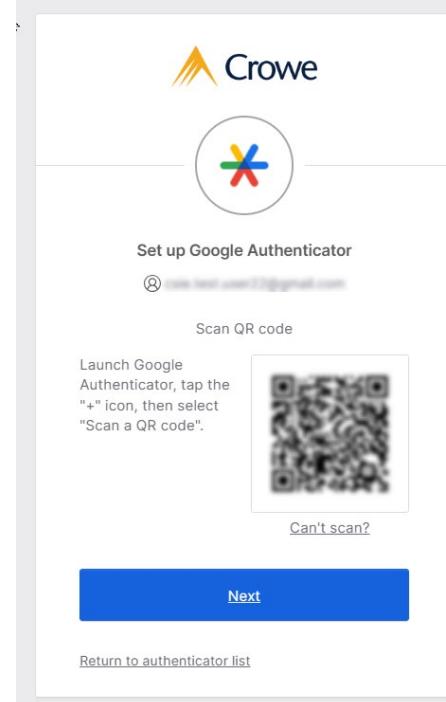


### Option B: Google Authenticator

1. Click **Setup** next to **Google Authenticator**.



5. Select **Scan QR Code** or **Enter setup key** displayed on your computer.



2. Choose your mobile device type (iPhone or Android).
3. Download **Google Authenticator** from the app store on your mobile device.
4. Open Google Authenticator, tap the "+" or "Add account" option.

6. Complete the setup. Google Authenticator is now configured for MFA.

# First Time Login for Clients

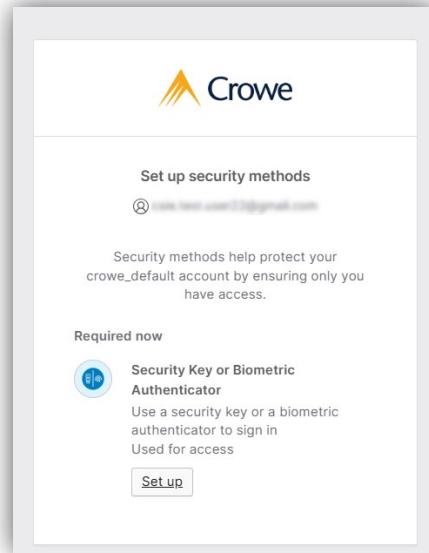
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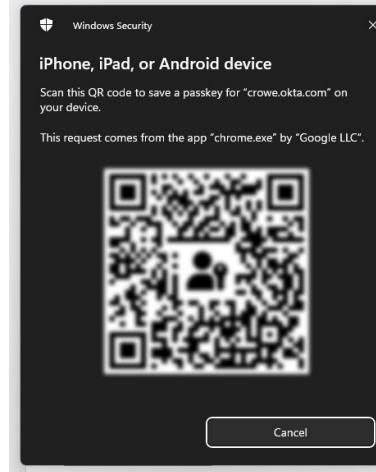
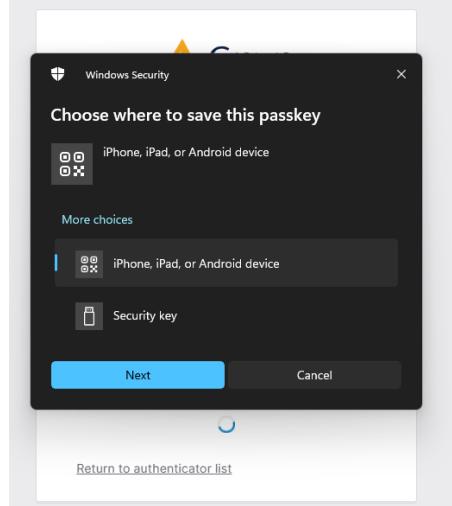
### Option C: Web Authentication (FIDO2)

Web Authentication lets you use a hardware security key (e.g., YubiKey or built-in device biometric sensors such as Apple with iOS16+ or Android 14+ device).

1. Click **Setup** next to Security Key or Biometric Authenticator.

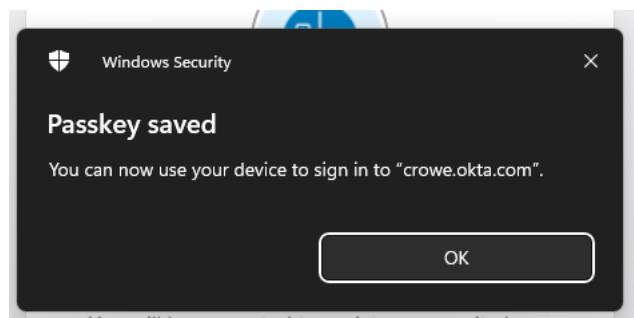


2. Follow the prompts on-screen



# First Time Login for Clients

## Crowe Secure Information Exchange



3. Once enrolled, your Web Authentication is now active.