

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

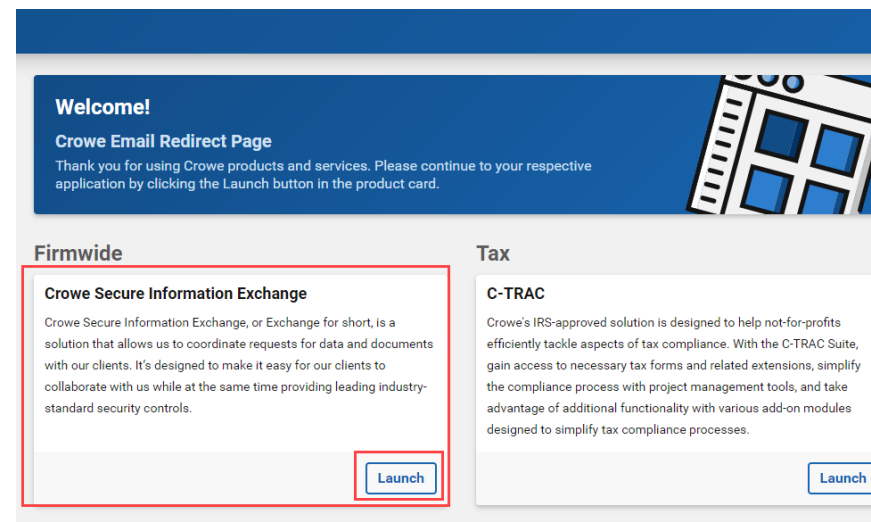
First Time Login to Crowe Exchange

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

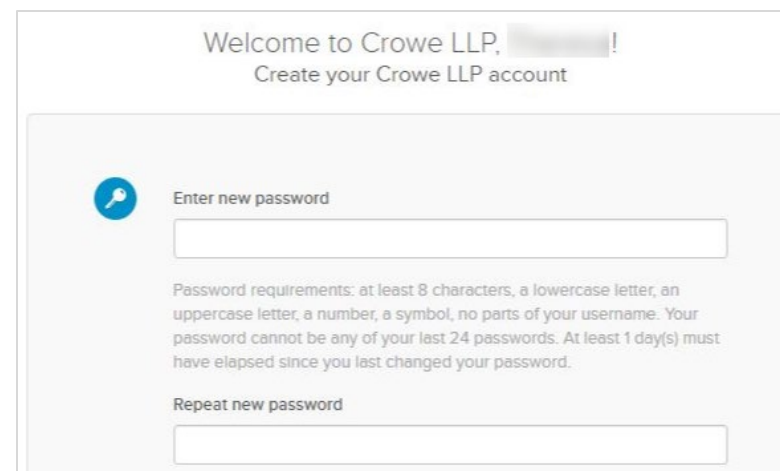
Note: Okta provides the MFA service for you to securely use Crowe Exchange.



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



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.

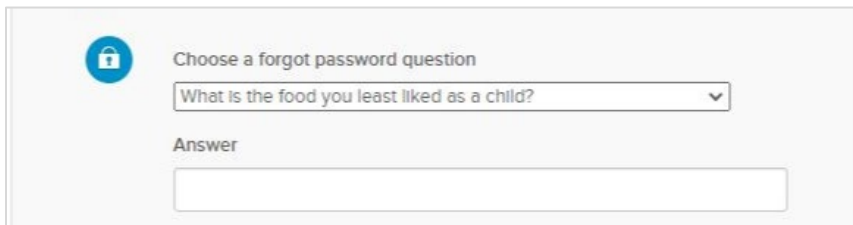


First Time Login for Clients

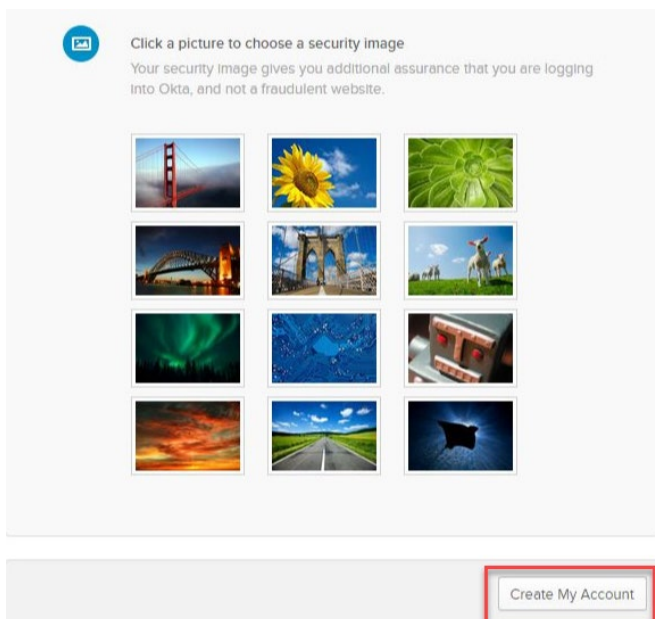
Crowe Secure Information Exchange



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



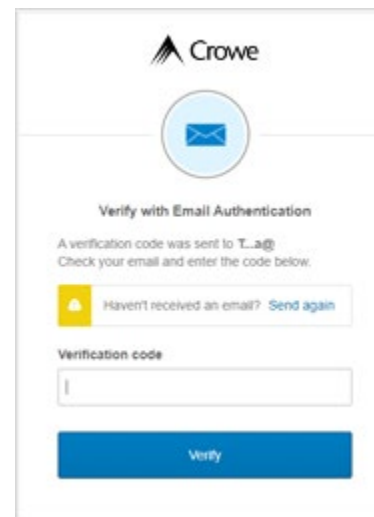
5. Click a picture to select your security image and then click **Create My Account**.



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



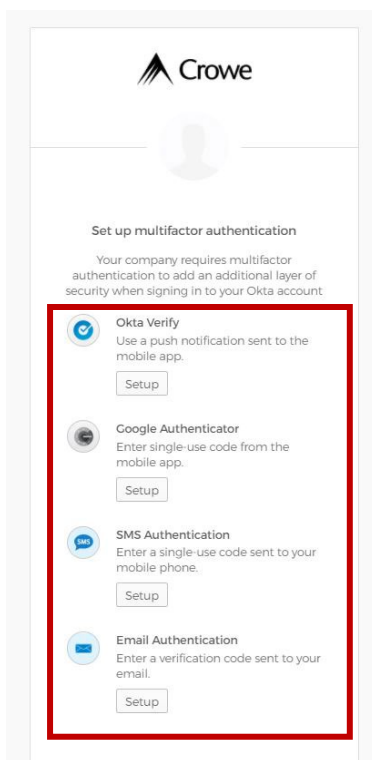
7. Once you receive the code, type it in the **Verification code** field and click **Verify**.



Multi-Factor Authentication Set-Up

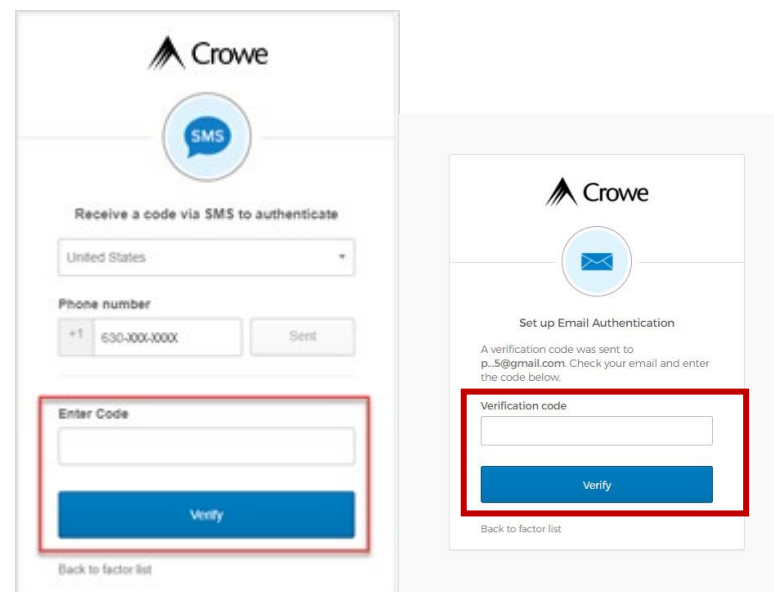
You can choose to include your mobile number or an email as a secondary MFA setting.

- 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**.



- 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**.

- 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.

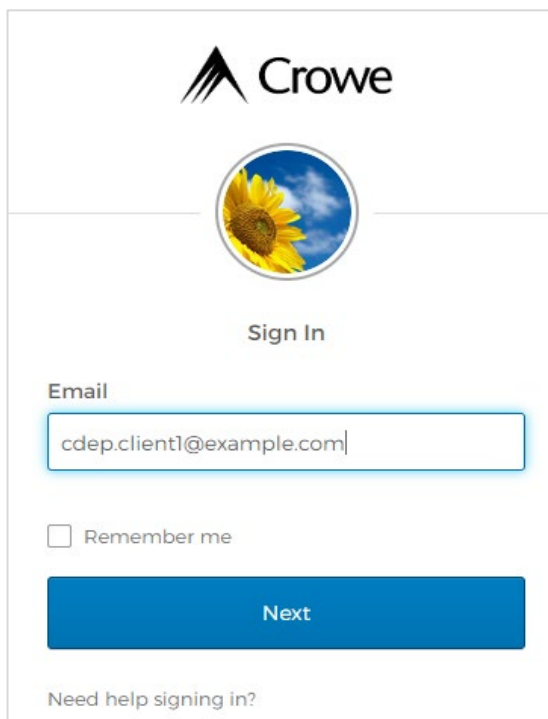
12. The **Crowe Universal Subscription Agreement** will open the first time Exchange opens. Read it and click **I Accept** to proceed.

Subsequent Login to Crowe Exchange

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

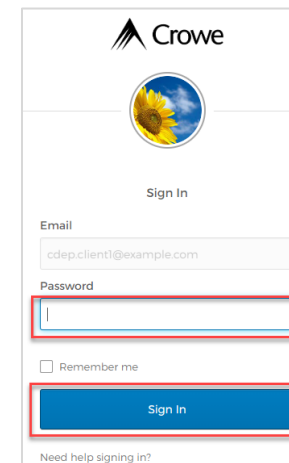
1. Click on the link in the email and the login screen will appear. Type your email in the **Email** field and click **Next**.

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



The login screen features the Crowe logo at the top. Below it is a circular profile picture of a sunflower. The text "Sign In" is centered. There is an "Email" input field containing "cdep.client1@example.com". Below the email field is a "Remember me" checkbox. A large blue "Next" button is positioned below the checkbox. At the bottom, there is a link that says "Need help signing in?".

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

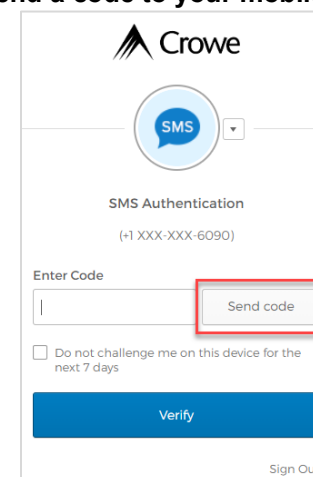


This is a cropped view of the login screen. The "Email" field is filled with "cdep.client1@example.com". The "Password" field is empty and highlighted with a red border. Below the password field is a "Remember me" checkbox. A blue "Sign In" button is highlighted with a red border. At the bottom, there is a link that says "Need help signing in?".

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

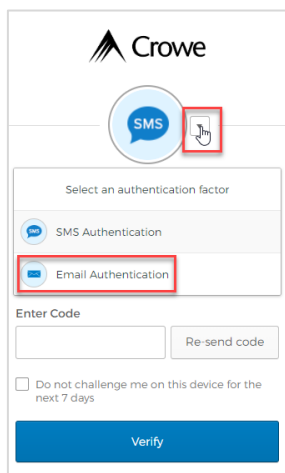
Note: If you want the code sent to your email that you set up in MFA, click the **arrow** next to SMS and select **Email Authentication**. Then select **Send me the code**.

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



The screen shows the "SMS Authentication" process. At the top is the Crowe logo. Below it is a circular icon with "SMS" and a dropdown arrow. The text "SMS Authentication" and "(+1 XXX-XXX-6090)" are displayed. There is an "Enter Code" input field. To its right is a "Send code" button highlighted with a red border. Below the input field is a checkbox labeled "Do not challenge me on this device for the next 7 days". A large blue "Verify" button is at the bottom. A "Sign Out" link is at the bottom right.

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



Crowe

SMS

Select an authentication factor

SMS Authentication

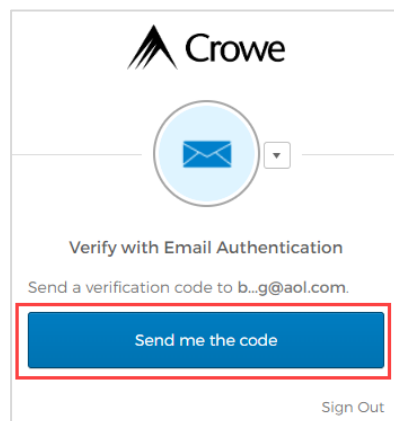
Email Authentication

Enter Code

Re-send code

☐ Do not challenge me on this device for the next 7 days

Verify



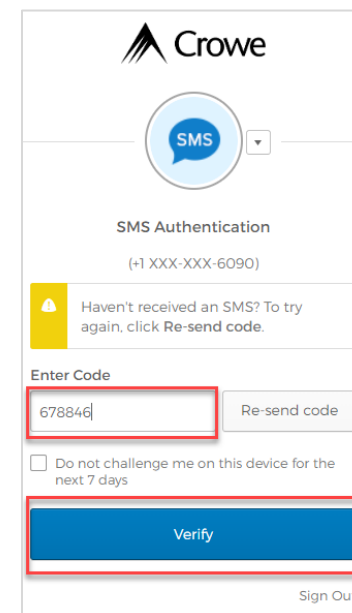
Crowe

Verify with Email Authentication

Send a verification code to b...g@aol.com.

Send me the code

Sign Out



Crowe

SMS

SMS Authentication

(+1 XXX-XXX-6090)

Haven't received an SMS? To try again, click Re-send code.

Enter Code

678846

Re-send code

☐ Do not challenge me on this device for the next 7 days

Verify

Sign Out

- 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.

Session Expiring Soon

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

Time Remaining: 02:12

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

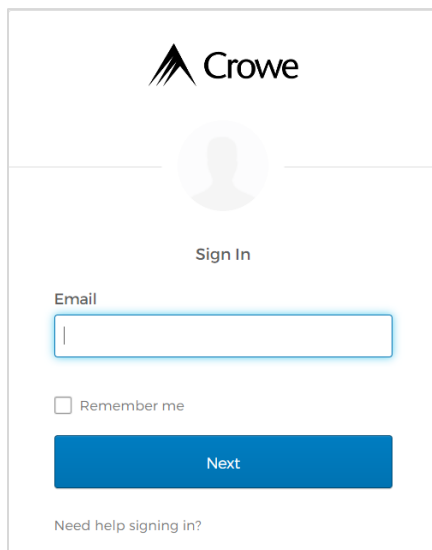
The **Send Code** page will appear for you to log back in.

Accessing Okta Administration Page

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

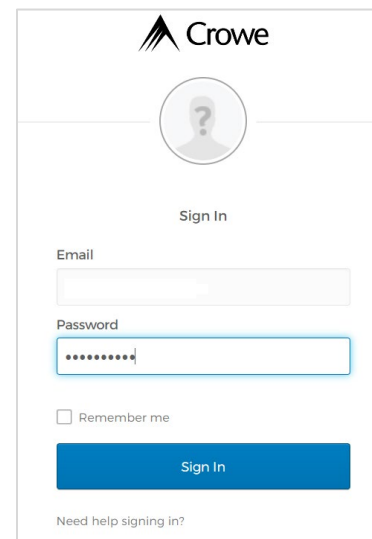
- Personal Information
- Security Image
- Extra Verification (Security Methods)
- Display language
- Change Password
- Forgotten Password Question

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**.



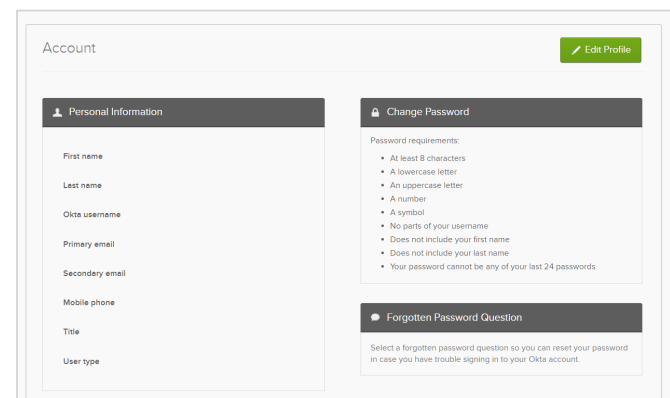
The screenshot shows the Crowe Sign In page. At the top is the Crowe logo. Below it is a placeholder for a profile picture. The text "Sign In" is centered. There is an "Email" input field with a blue border. Below the input field is a "Remember me" checkbox. At the bottom is a blue "Next" button. A link "Need help signing in?" is at the very bottom.

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



This screenshot is similar to the previous one, but the "Password" input field is highlighted with a blue border. The password is masked with dots. The "Sign In" button is blue and located below the password field. A link "Need help signing in?" is at the bottom.

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.



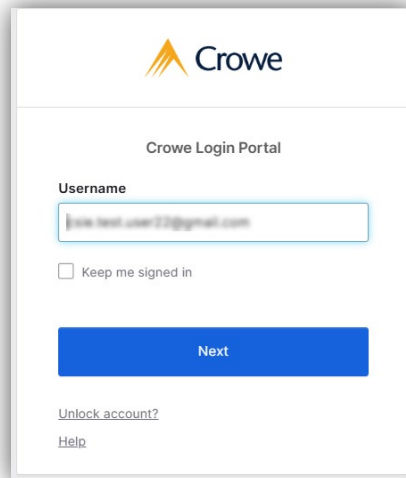
The screenshot shows the "Account" settings dashboard. At the top right is a green "Edit Profile" button. The dashboard is divided into two main sections: "Personal Information" and "Change Password". The "Personal Information" section includes fields for First name, Last name, Okta username, Primary email, Secondary email, Mobile phone, Title, and User type. The "Change Password" section includes a "Password requirements" list: 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, and Your password cannot be any of your last 24 passwords. Below this is a "Forgotten Password Question" section with a link to select a question.

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**.

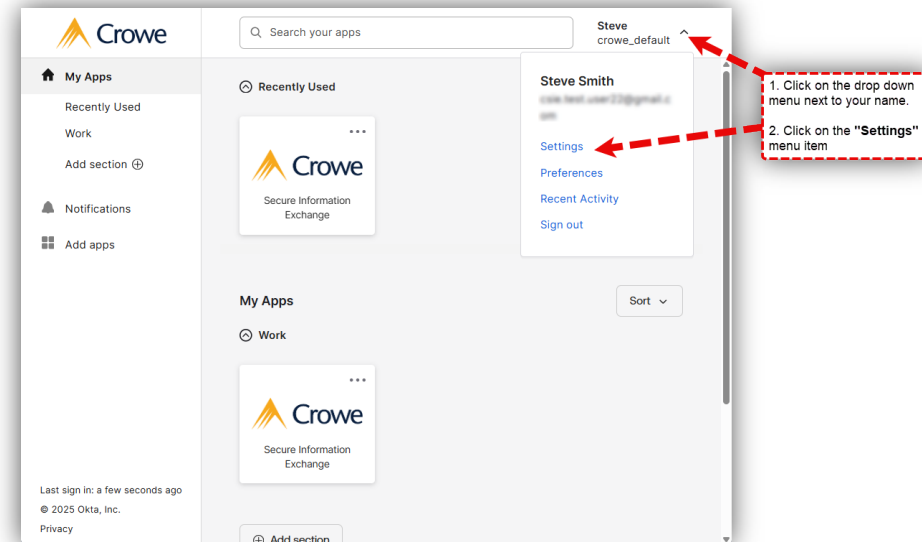


The screenshot shows the Crowe Login Portal. At the top is the Crowe logo. Below it is the text "Crowe Login Portal". There is a "Username" label above a text input field containing "crowe.test.user22@gmail.com". Below the input field is a checkbox labeled "Keep me signed in". At the bottom is a large blue button labeled "Next". Below the button are two links: "Unlock account?" and "Help".

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

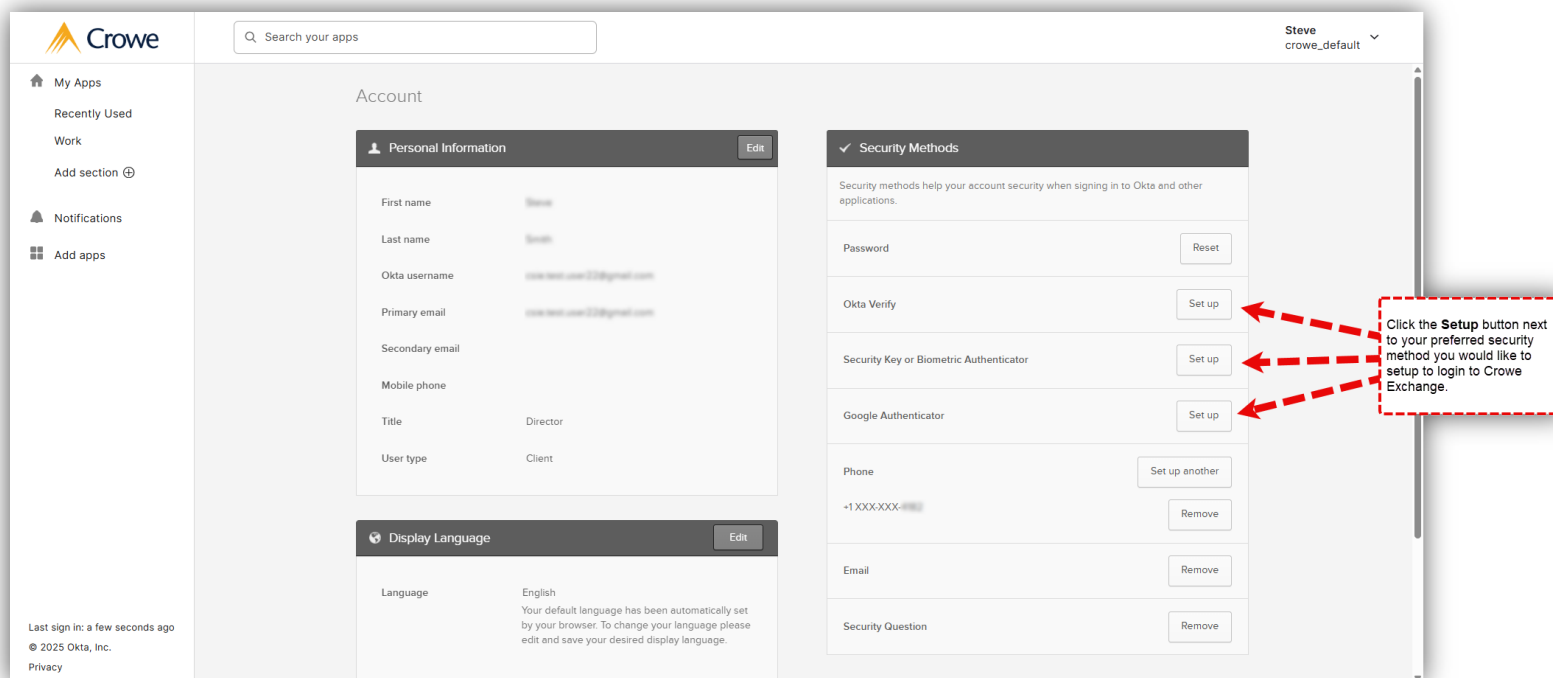
Step 2: Navigate to Your Account Settings

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



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



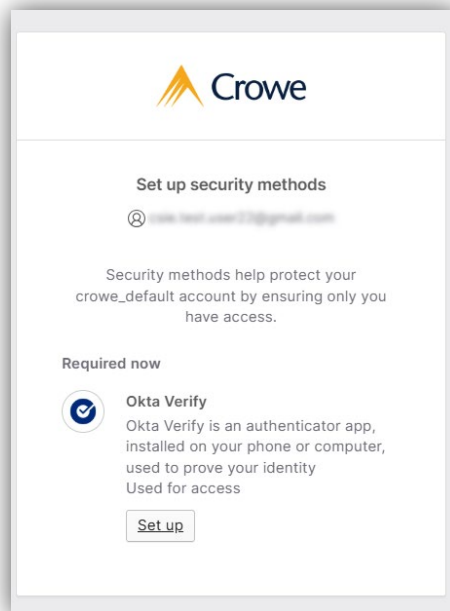
The screenshot displays the 'Account' page of the Crowe Secure Information Exchange. The left sidebar contains navigation links: 'My Apps', 'Recently Used', 'Work', 'Add section', 'Notifications', and 'Add apps'. The main content area is divided into two sections: 'Personal Information' and 'Security Methods'. The 'Personal Information' section includes fields for First name, Last name, Okta username, Primary email, Secondary email, Mobile phone, Title, and User type. The 'Security Methods' section includes a 'Password' field with a 'Reset' button, and three rows for 'Okta Verify', 'Security Key or Biometric Authenticator (FIDO2)', and 'Google Authenticator', each with a 'Set up' button. Below these are fields for 'Phone', 'Email', and 'Security Question', each with a 'Set up another' or 'Remove' button. A red dashed box highlights the 'Set up' buttons for the three MFA methods, with an arrow pointing to a callout box that reads: 'Click the **Setup** button next to your preferred security method you would like to setup to login to Crowe Exchange.'

Authenticator App Setup Instructions

Choose one of the following authenticator apps:

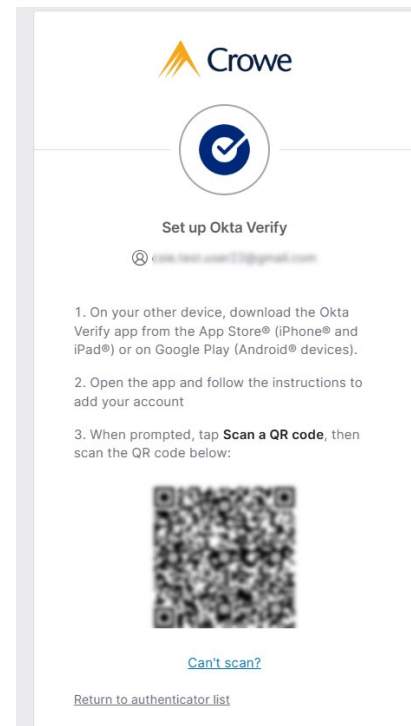
Option A: Okta Verify

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



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.

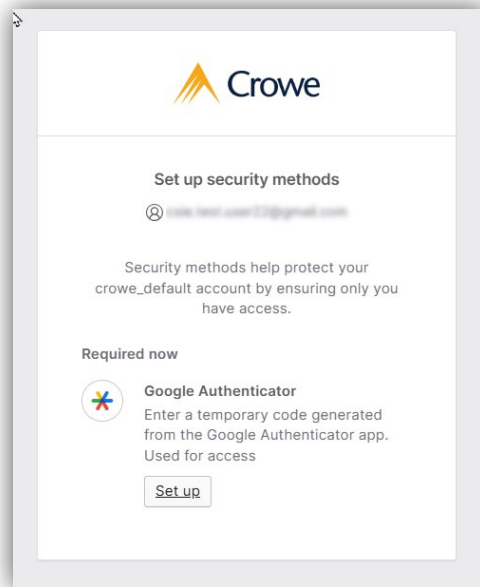
5. Scan the provided QR code on your computer screen or enter the code manually.



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

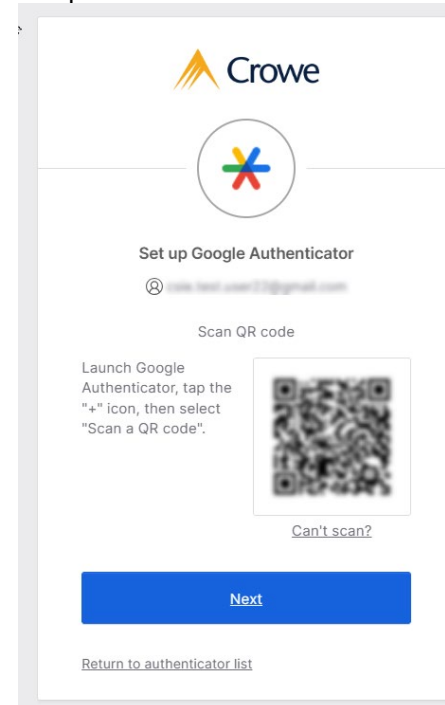
Option B: Google Authenticator

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



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.

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

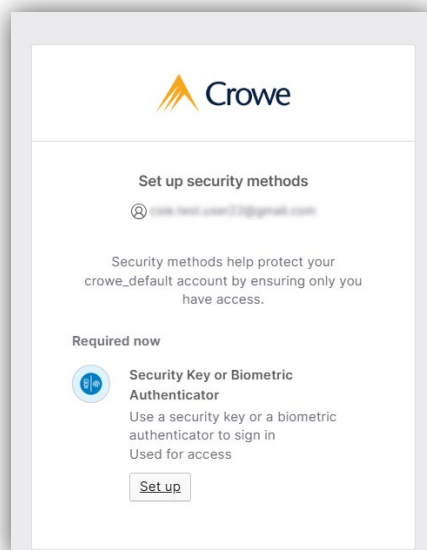


6. Complete the setup. Google Authenticator is now configured for MFA.

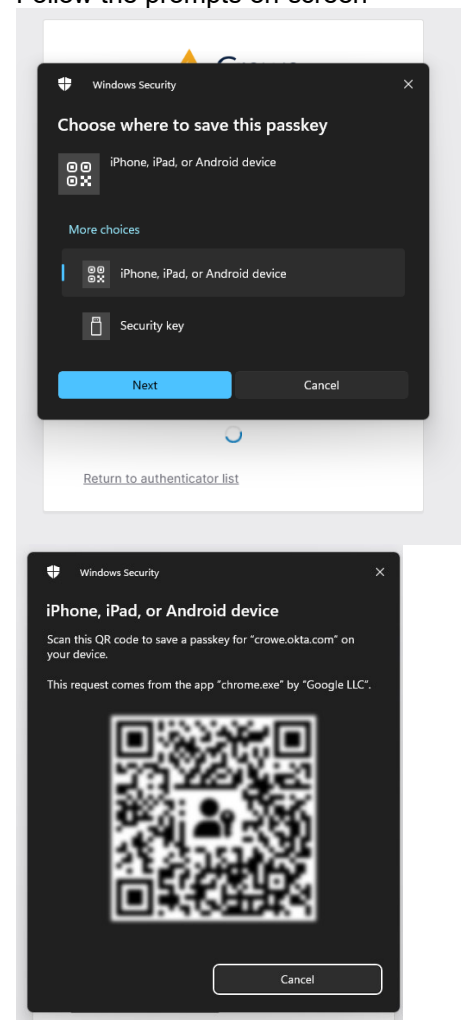
Option C: Web Authentication (FIDO2)

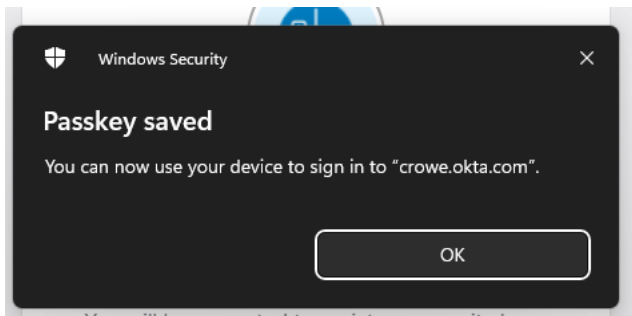
Web Authentication lets you use a hardware security key (e.g., YubiKey or built-in device biometric sensors such as Apple with iOS16+ or Android 14+ device).

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



2. Follow the prompts on-screen





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