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.

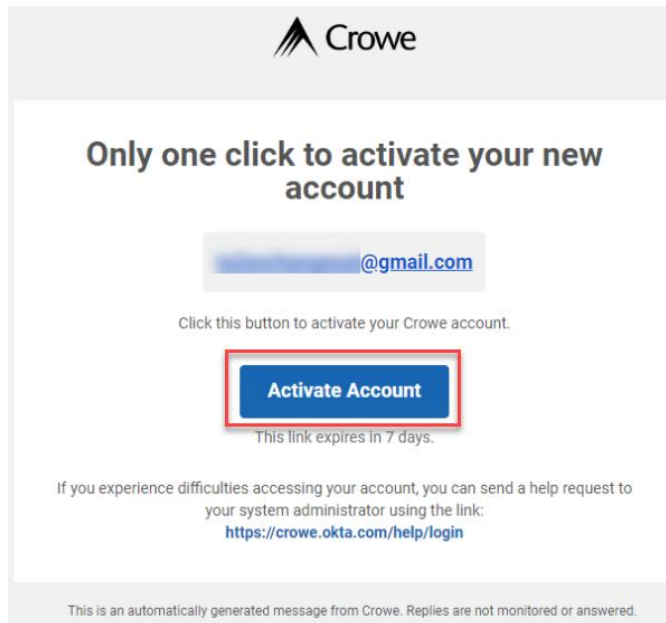On subsequent visits to Exchange, you'll have several options in which you can use MFA to login to Exchange

This job aid covers:

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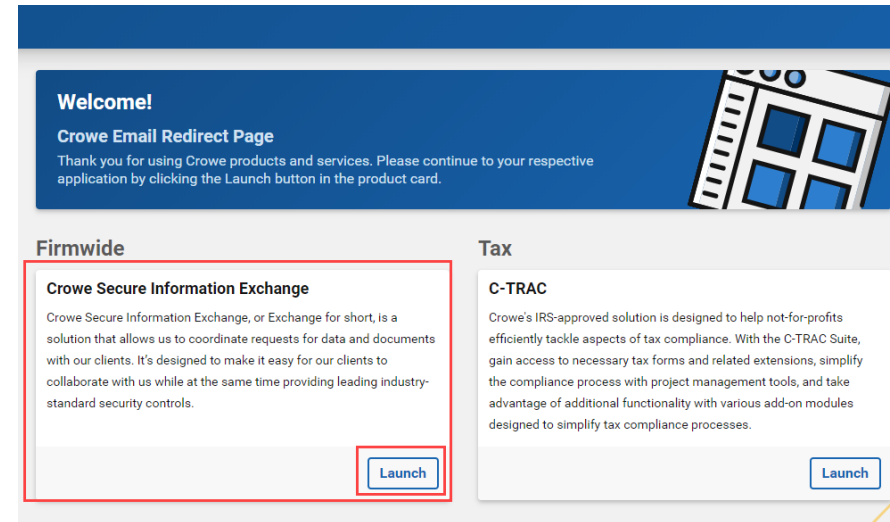- Subsequent Login to Crowe Exchange
- Accessing Okta Admin site

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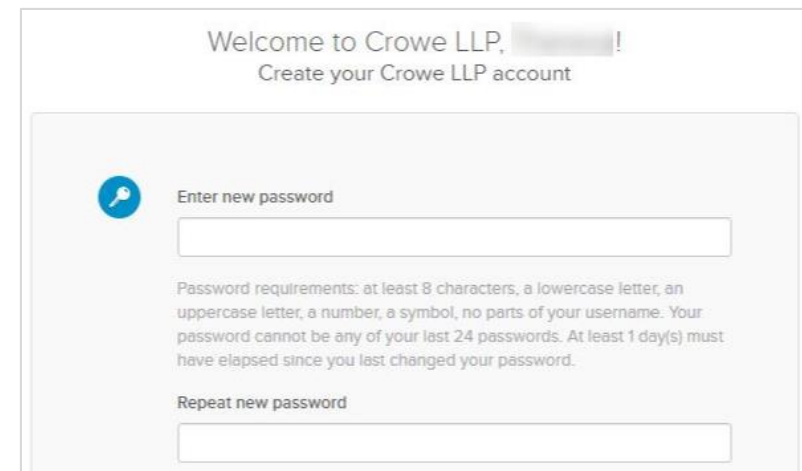
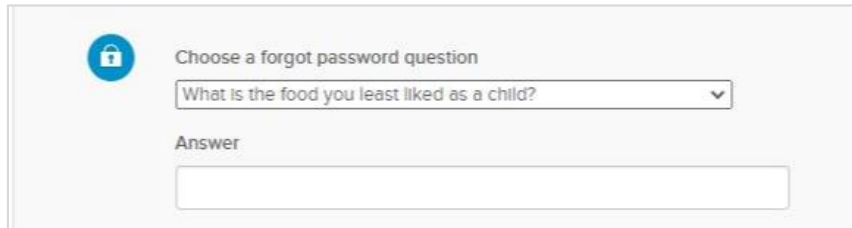   **Note:** Okta provides the MFA service for you to securely use Crowe Exchange.

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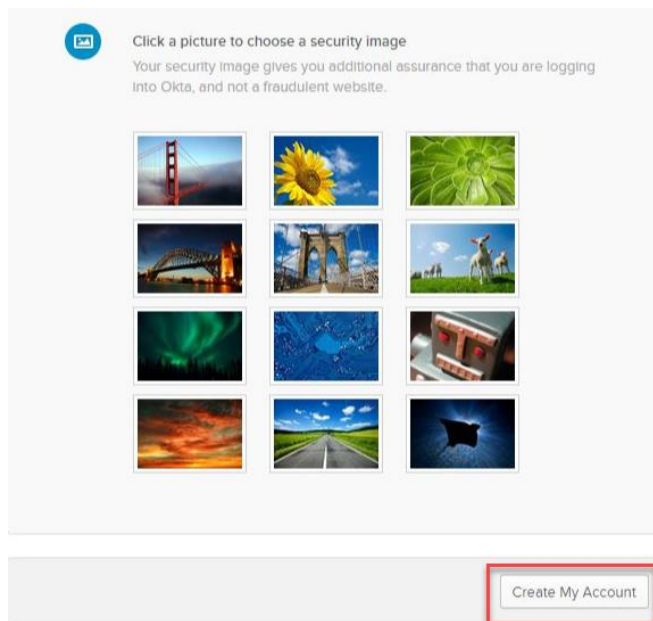

3. The Welcome to Crowe LLP screen will appear. Type a new password in the **Enter new password** field. Then reenter it in the **Repeat new password** field.

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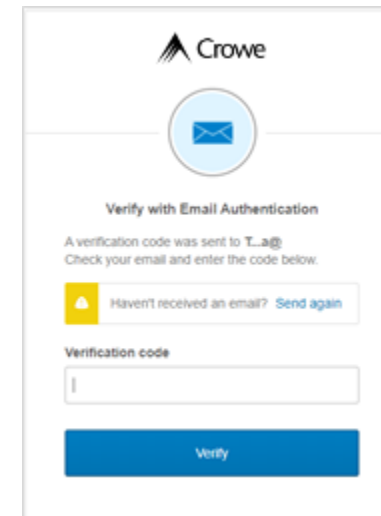

5. Click a picture to select your security image and then click **Create My Account**.

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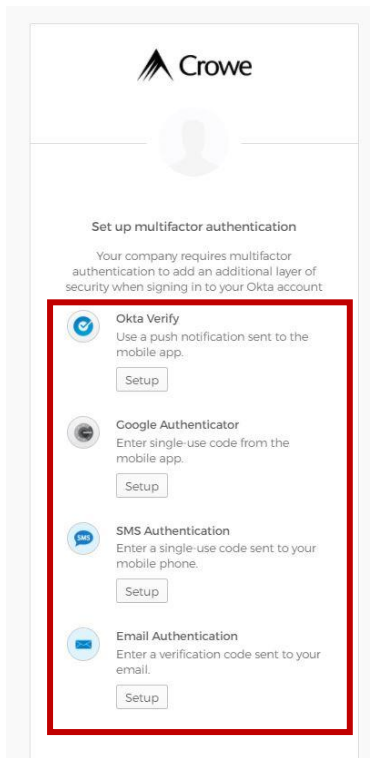

7. Once you receive the code, type it in the **Verification code** field and click **Verify**.

Looking for Support? Please call or email us at: 866-717-2478 or SecureExchangeSupport@Crowe.com

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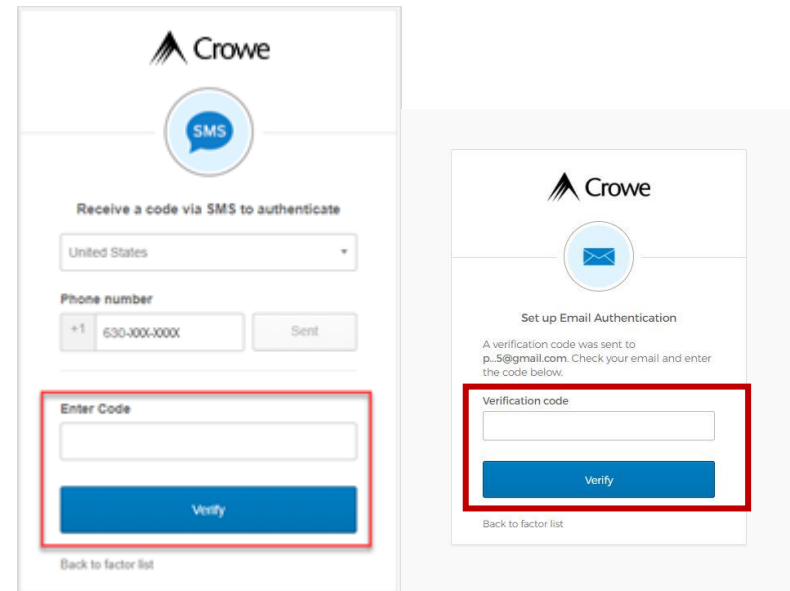
Optional Multi-Factor Authentication Set-Up
You can choose to include your mobile number or an email as a secondary MFA setting.

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**.
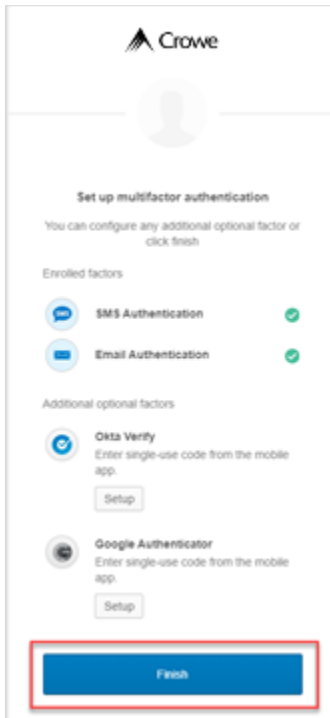
10. Once you receive the code on your mobile phone or through email, type the code in the **Enter Code** field and click **Verify**.
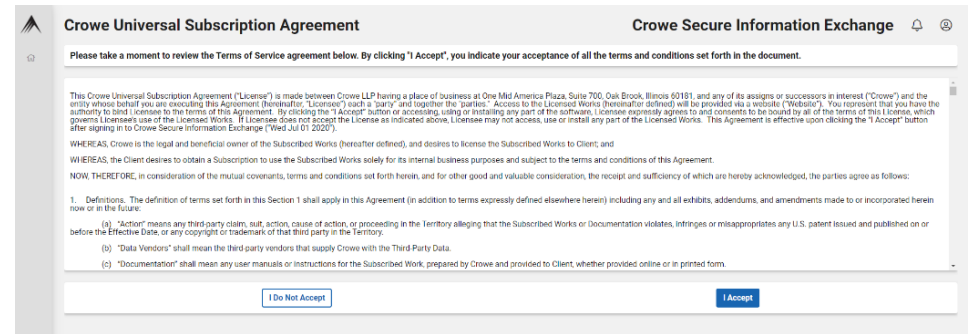
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11. You will receive a screen confirming that your MFA is set up. Click **Finish** and Crowe Exchange will open.

12. The **Crowe Universal Subscription Agreement** will open the first time Exchange opens. Read it and click **I Accept** to proceed.
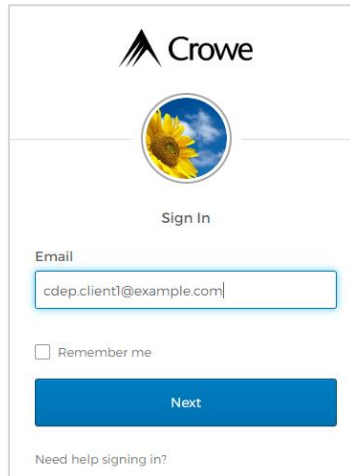
Looking for Support? Please call or email us at: 866-717-2478 or SecureExchangeSupport@Crowe.com

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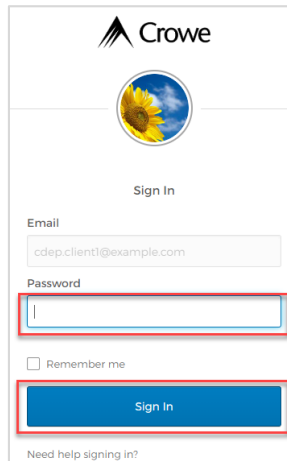## Subsequent Login to Crowe Exchange

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.
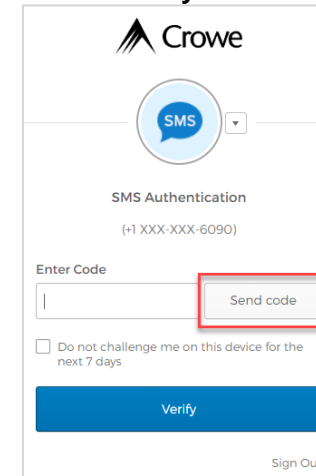

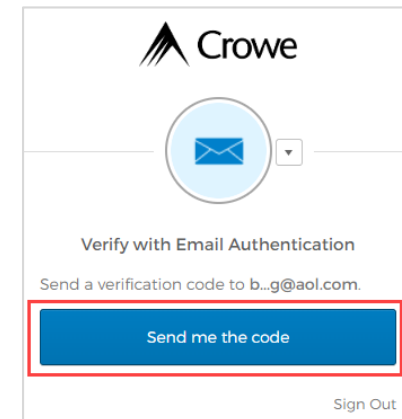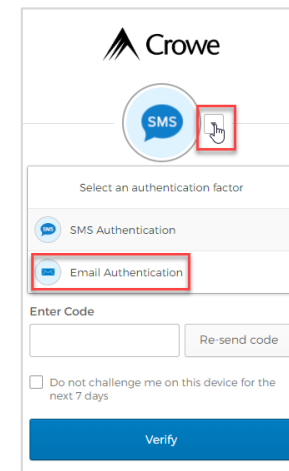2. Type your password in the **Password** field. Then click **Sign In**.

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**.

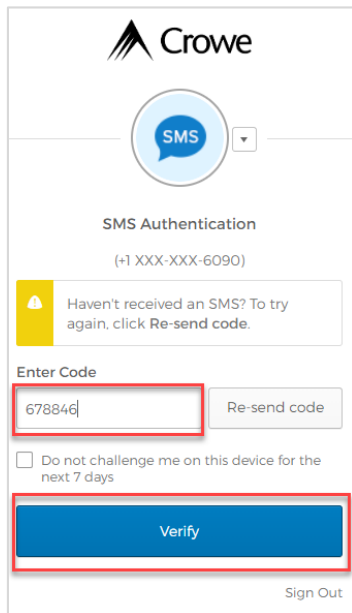   **If you choose to send a code to your mobile device, you will see:**

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

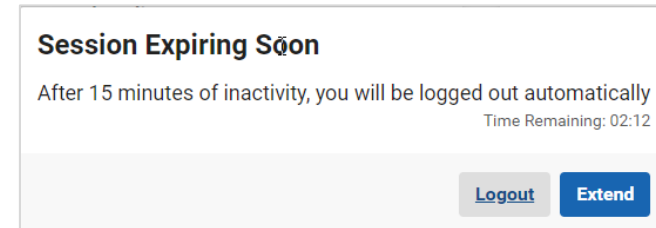Looking for Support? Please call or email us at: 866-717-2478 or SecureExchangeSupport@Crowe.com

4. 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.
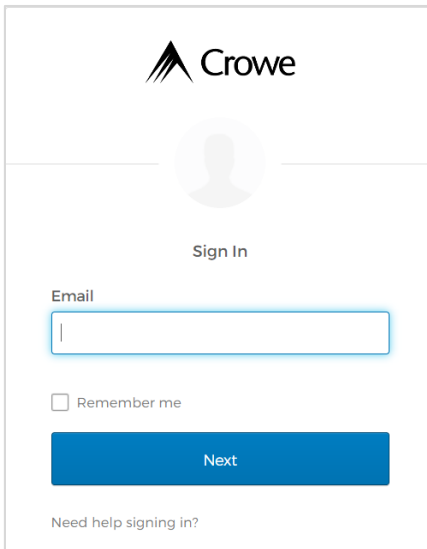
Session Expiring Soon

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.

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

Accessing Okta Administration Page

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

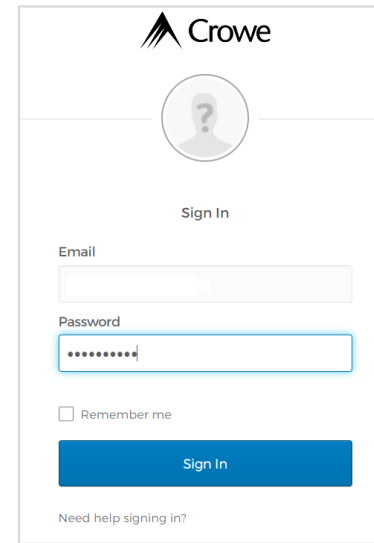- Personal Information
- Security Image
- Extra Verification
- Display language
- Change Password
- Forgotten Password Question

1. Type https://crowe.okta.com/enduser/settings into your preferred internet browswer.

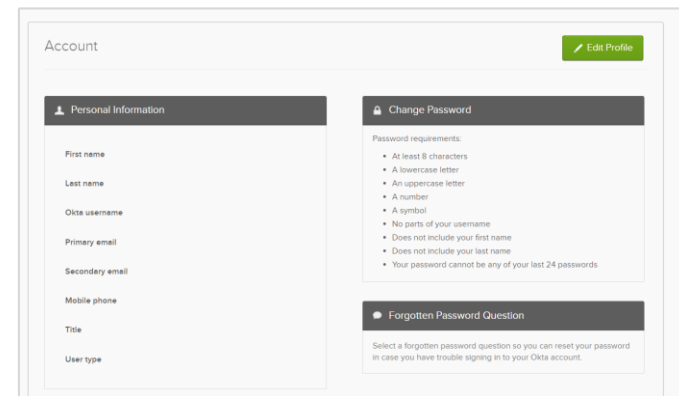2. Enter the email address you use to login to Exchange, click **Next.**

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

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.

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Revised: October 2020