



NEW BIRCHES GROUP LOGIN PROCESS

User Guide

For Clients

As part of our ongoing efforts to enhance security and safeguard sensitive data, Birches Group has implemented multi-factor authentication (MFA) across our applications and services. This will guide you on your migration to the new MFA login process.

v220715.13

Question/Suggestions about this document: softwaresupport@birchesgroup.com

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Version History

| Version Number | Release Date | Details |
|----------------|---------------|---------------------|
| 220505.88 | May 5, 2022 | Initial draft. |
| 220520.284 | May 25, 2022 | Screenshot updates. |
| 220715.13 | July 15, 2022 | Initial release. |

Introduction

While using this user guide, please note the following:

- This user guide covers **Indigo app version 4.6.8209** or higher and the **Community™ website** as of July 18, 2022 or later.
- Both products have the **same login process**.
- For conciseness, sample images for each step feature the Community™ website. The same steps are **applicable for Indigo app users**.
- If you wish to use the Microsoft Authenticator app for the verification process, please download and install the app on your Android or iOS device from this link: <https://www.microsoft.com/en-us/security/mobile-authenticator-app>

General Login Steps

The new login process features the following general steps:

1. Type in your BG Account registered email address and select a verification method
2. Type in your BG Account password
3. Change/Update your password (one-time only)
4. Enter the verification code sent either via email or as shown in the Microsoft Authenticator app

New Login Screens

The new login form/screen features an option panel to choose between the following verification methods:

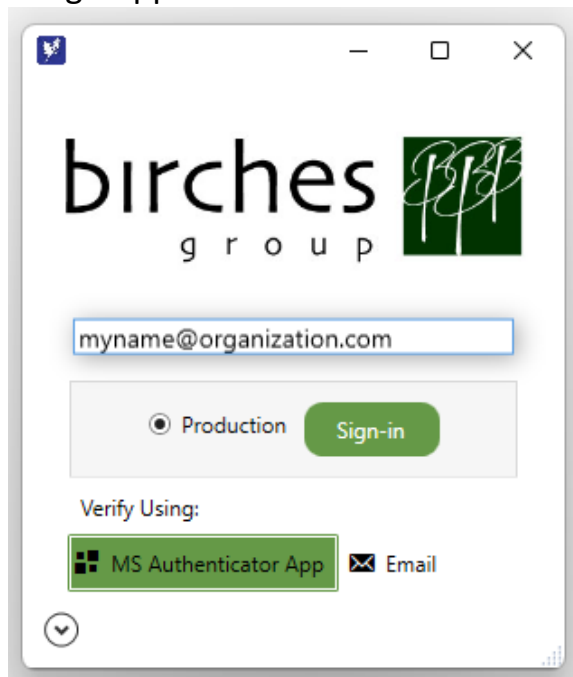
- Microsoft Authenticator app*
- Email

*For greater convenience and security, Birches Group recommends using the Microsoft Authenticator App for authentication.

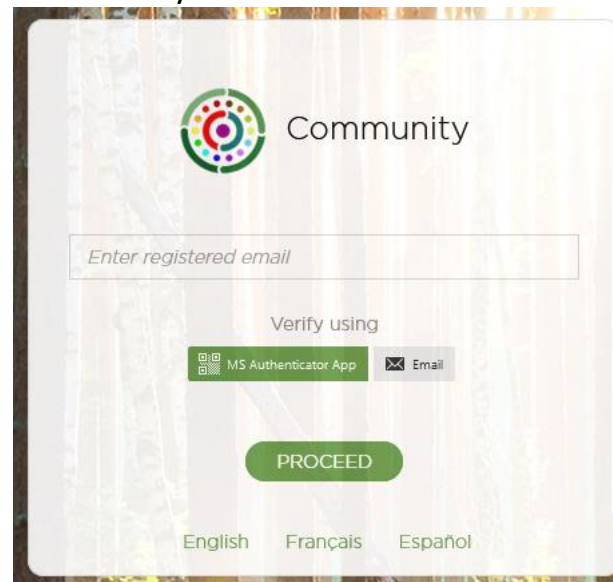
IMPORTANT:

- In the Indigo app, the verification method options will appear as you type your registered email address.
- Make sure to select your preferred verification method first before clicking the **Sign in** or **Proceed** button.

Indigo App



Community™ Website



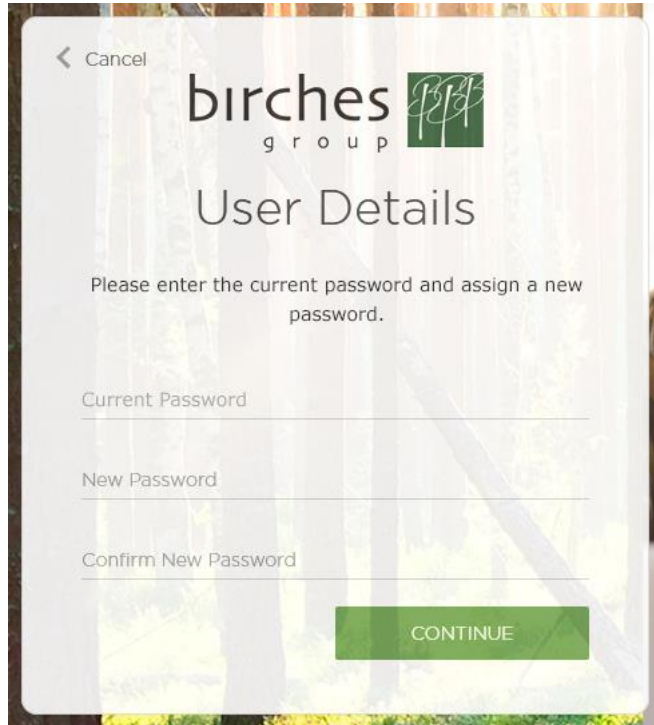
How to Login Using Microsoft Authenticator App as Verification Method

PRE-REQUISITE: The Microsoft Authenticator App is required for this verification method. You can download and install the app on your Android or iOS device by going to this link: <https://www.microsoft.com/en-us/security/mobile-authenticator-app>

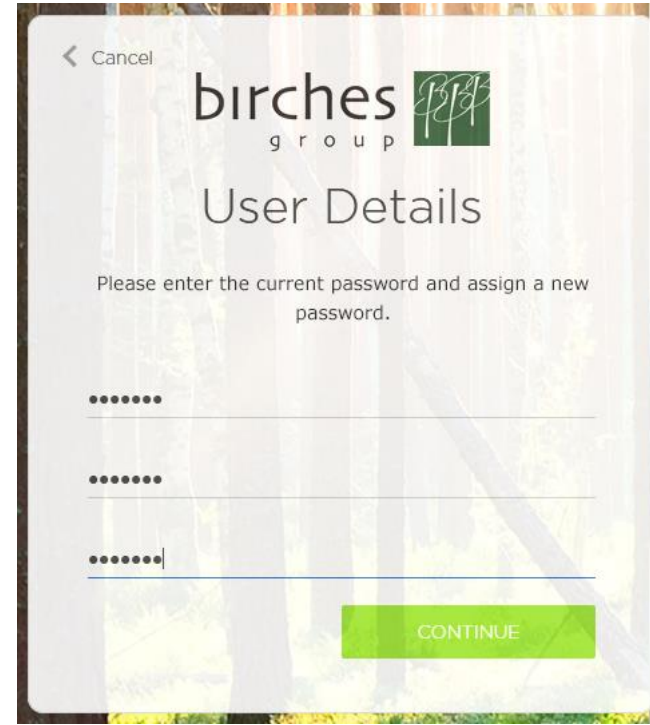
1. Type in your BG Account registered email address and select **MS Authenticator App** as verification method. Click the **Proceed (Sign-in in Indigo)** button.
2. Type in your BG Account password and click the **Sign In** button.



3. (One-time only): For security purposes, you will be prompted to reset your current/temporary password.



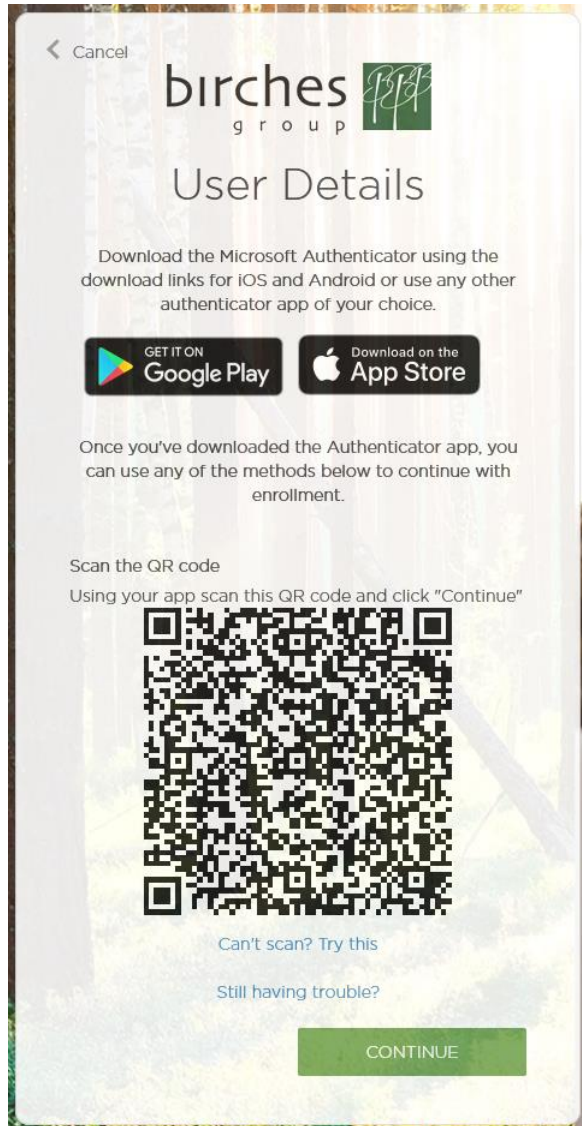
4. Enter your new password on the **New Password** and **Confirm Password** fields, then click the **Continue** button to proceed.



**New password requirements:*

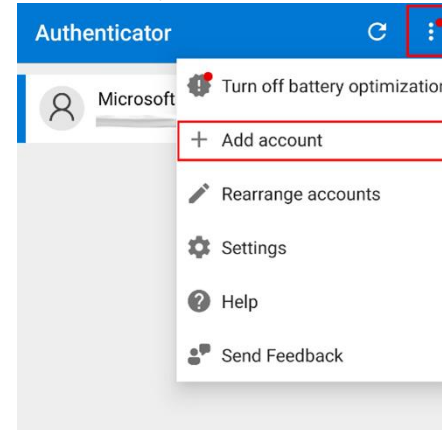
- *At least 8 characters*
- *At least 1 uppercase letter*
- *At least 1 number*
- *At least 1 symbol*

5. Wait until you see the following screen:

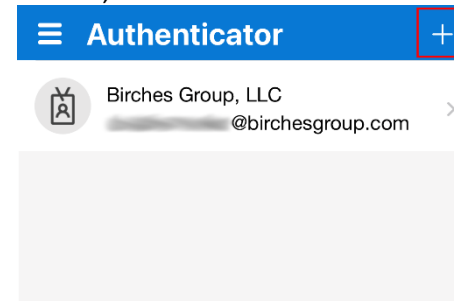


6. Open **Microsoft Authenticator** app in your phone, and in the upper right corner, select the **3-dotted** menu icon (for Android) or + menu icon (for iOS):

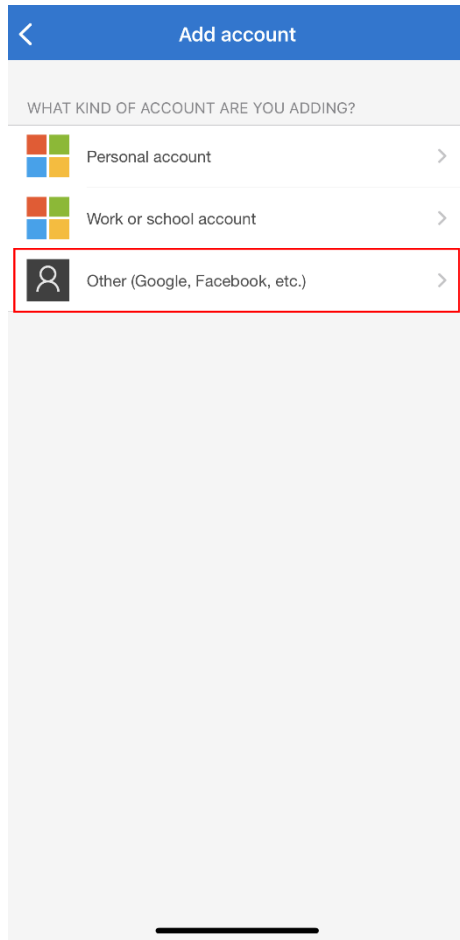
For Android, select **+ Add account:**



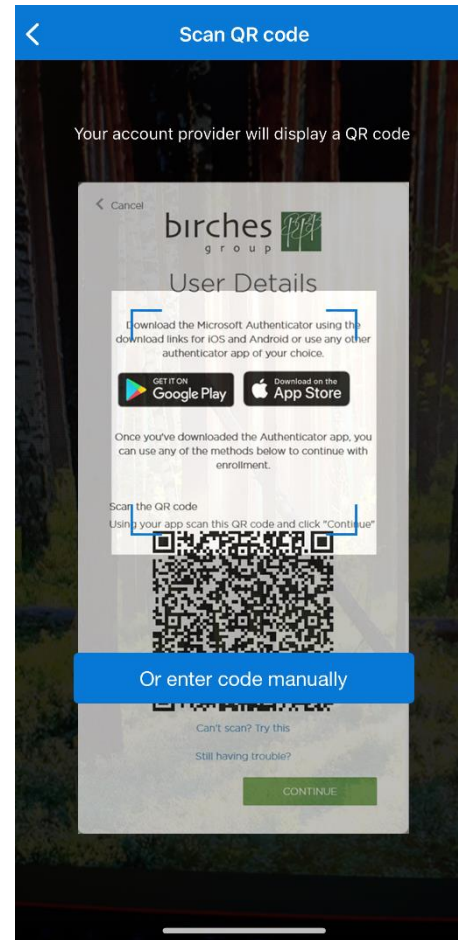
For iOS, select **+**:



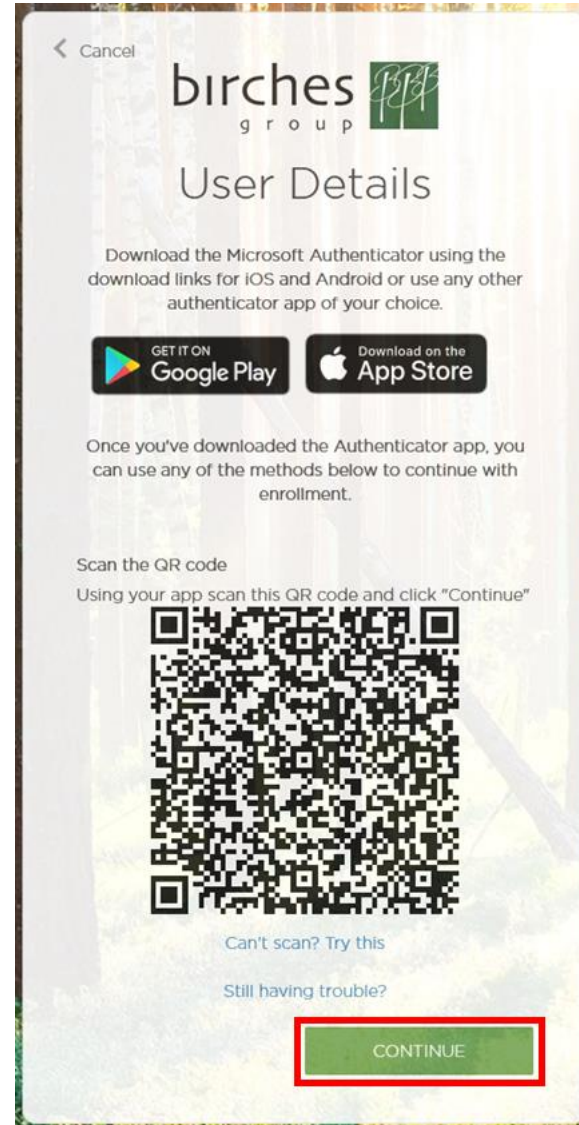
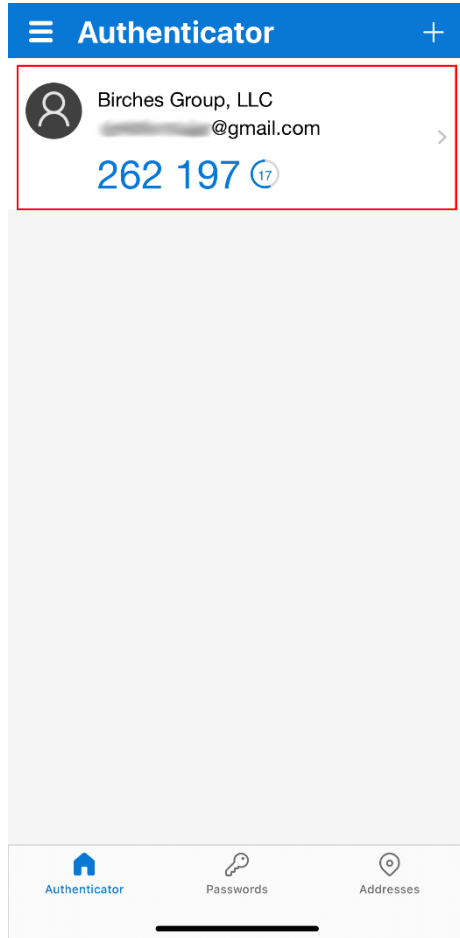
7. Select **Other account (Google, Facebook, etc.):**



8. Scan the QR code shown in Indigo or Community™ website illustrated in Step 5.

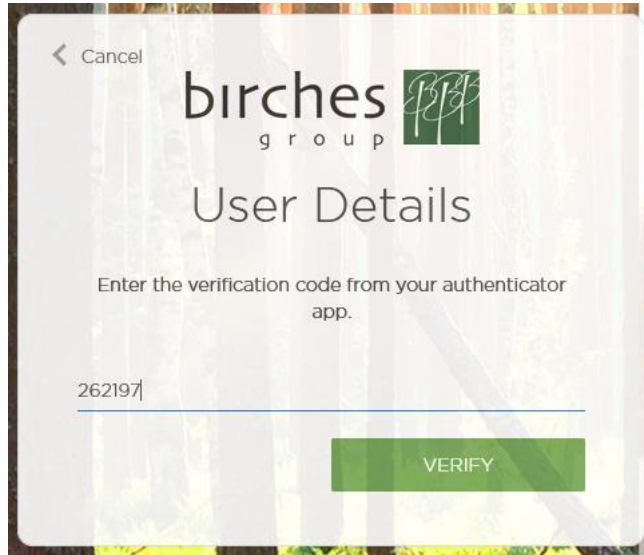


- 9. You should be able to see a new **Birches Group, LLC** account with your registered email in your Microsoft Authenticator app:
- 10. Back to Indigo or Community™ website, select **Continue** to proceed:



11. In **Enter your code**, type the code that appears in your Microsoft Authenticator app and click **Verify**:

12. Success! You have been verified and granted access to Indigo or Community™ website.



I can't scan the QR Code. What now?

If you're unable to scan the QR code in Step 8, you can add the Birches Group, LLC account manually:

1. In the Microsoft Authenticator app on your phone, select **OR ENTER CODE MANUALLY** button (refer to screenshot in Step 8).
2. In Indigo or Community™ website, click on the **"Still having trouble?"** text (refer to screenshot in Step 5). This displays **Account Name** and **Secret**.
3. Enter the **Account Name** and **Secret** in your Microsoft Authenticator app, and then select **FINISH**.

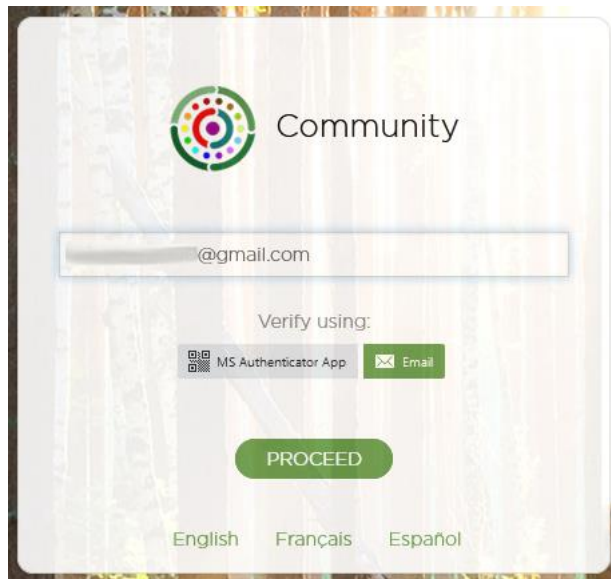
After manually adding Birches Group, LLC account to your Microsoft Authenticator app, **proceed to Step 9** of this user guide.

Succeeding Logins

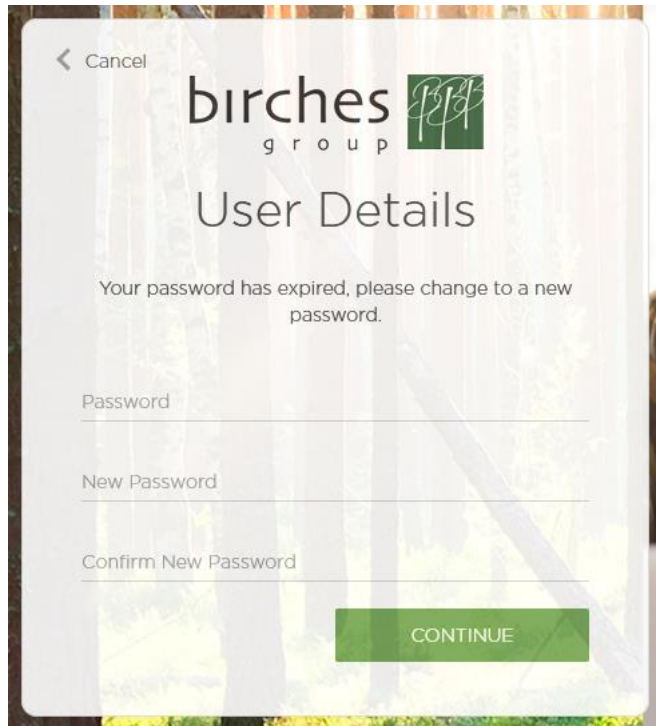
For succeeding logins using Microsoft **Authenticator** app as your verification method, **Steps 3 to 9 are skipped**. Total steps: 4.

How to Login Using Email as Verification Method

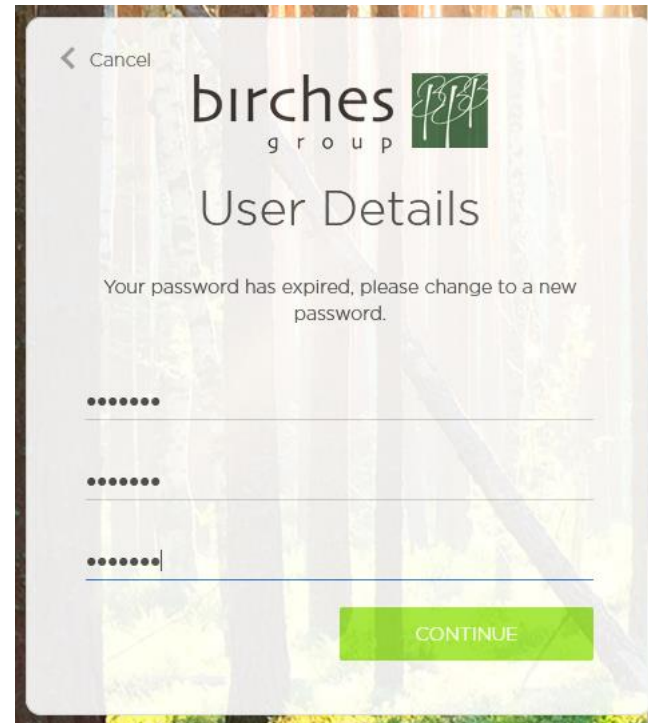
1. Type in your BG Account registered email address and select **Email** as verification method. Click the **Proceed (Sign-in in Indigo)** button.
2. Type in your BG Account password and click the **Sign In** button.



3. (One-time only): For security purposes, you will be prompted to enter a new password.



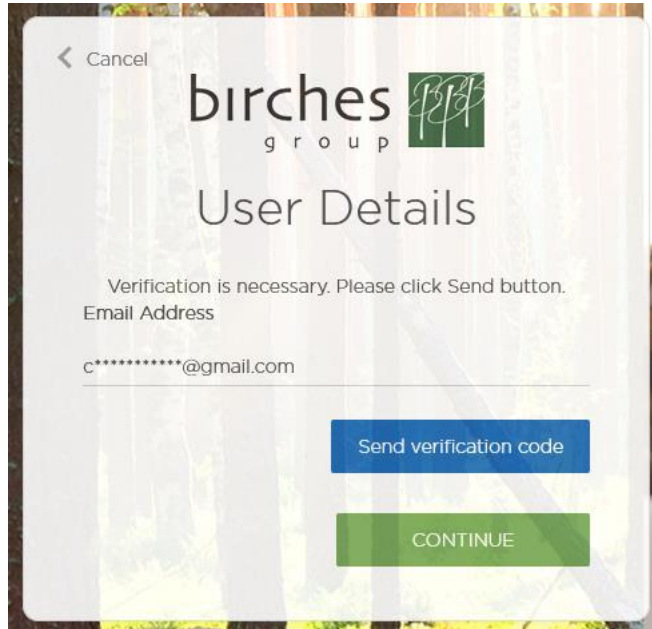
4. Type in your BG Account password, then enter a new password on the **New Password** and **Confirm Password** fields. Click the **Continue** button to proceed.



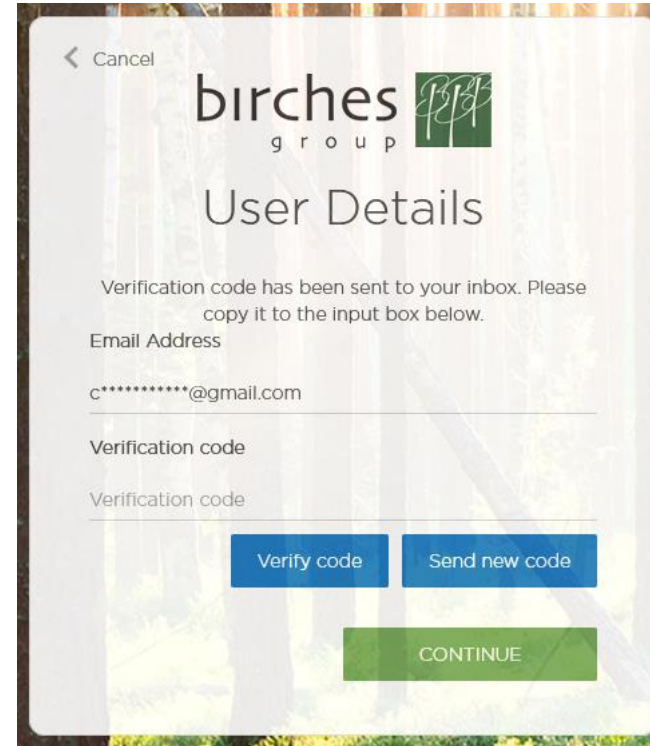
**New password requirements:*

- *At least 8 characters*
- *At least 1 uppercase letter*
- *At least 1 number*
- *At least 1 symbol*

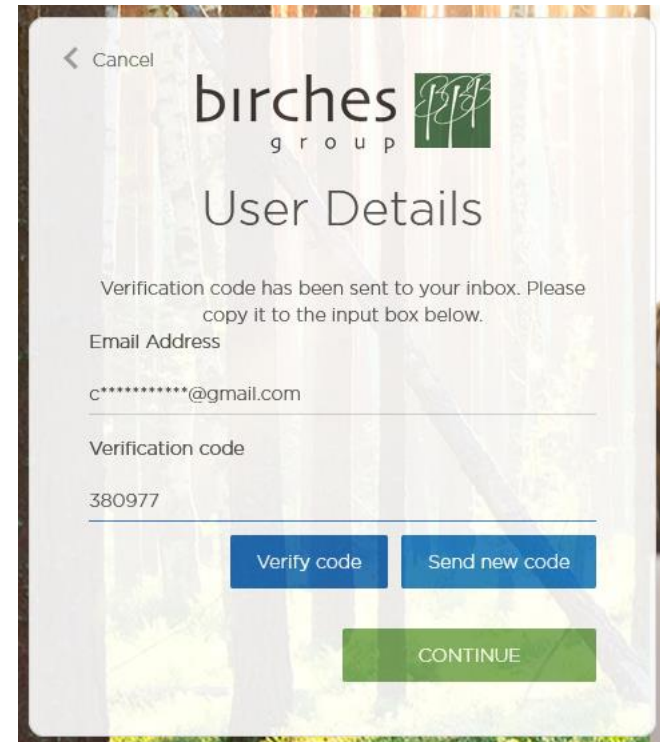
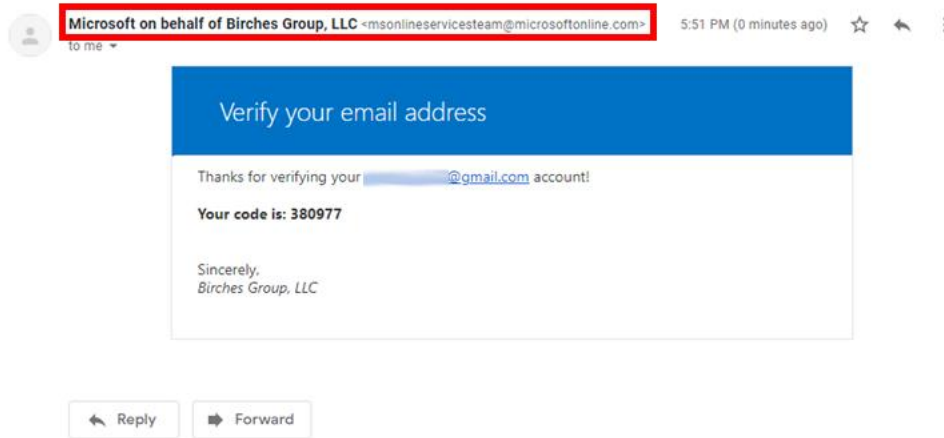
5. Wait until you see the following screen, and click **Send verification code** button:



6. Wait again until you see the following screen:



7. Check your email account and look for an email with the subject **Microsoft on behalf of Birches Group, LLC.**, and note/copy the code you see there:
8. Back on Indigo or Community™ website, type/paste the verification code from the email you received and click the **Verify code** button:



9. Wait until you see the following screen, then click the **Continue** button:



10. Success! You have been verified and granted access to Indigo or Community™ website.

Succeeding Logins

For succeeding logins using **Email** as your verification method, **Steps 3 and 4 are skipped**. Total steps: 8.

