



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:

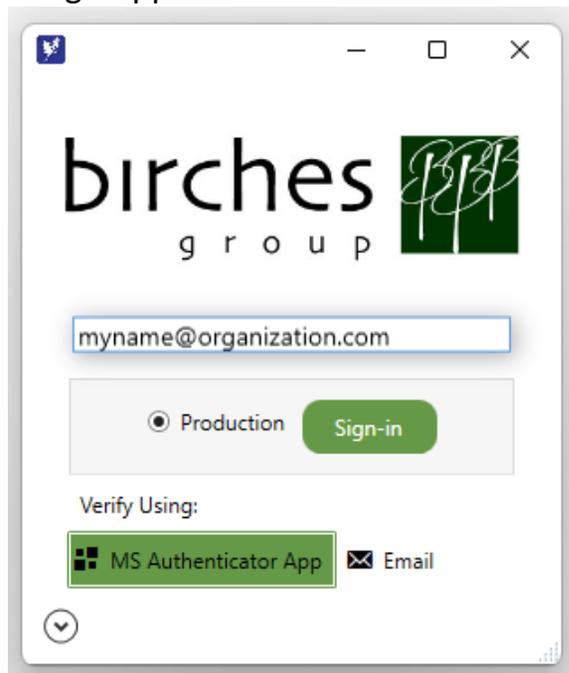
- Microsoft Authenticator app*
- Email

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

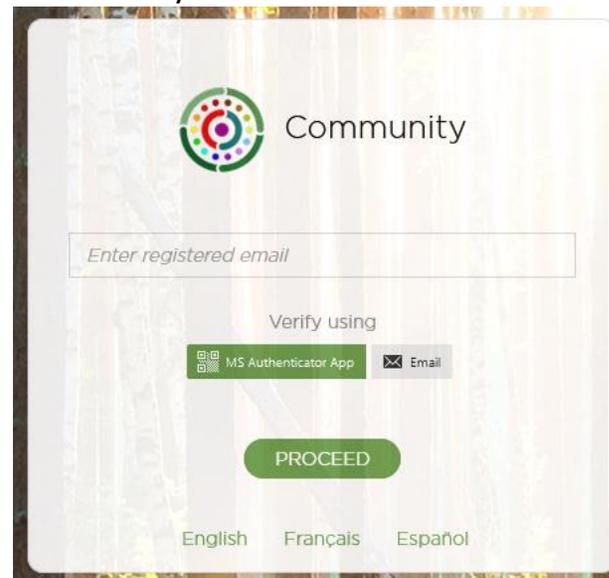
IMPORTANT:

- 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



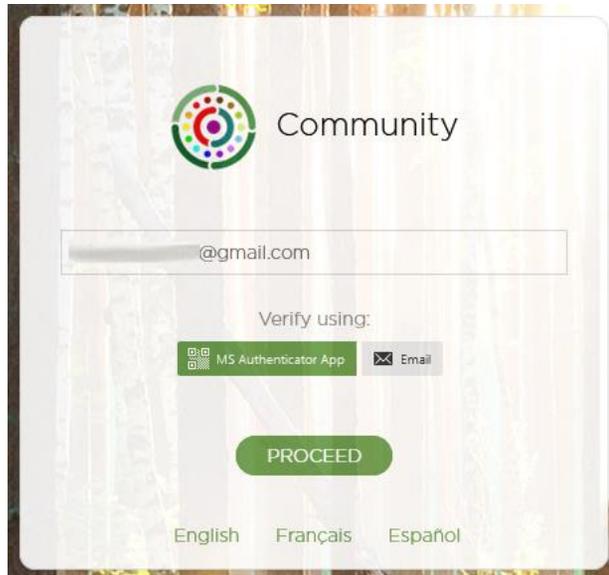
Community™ Website



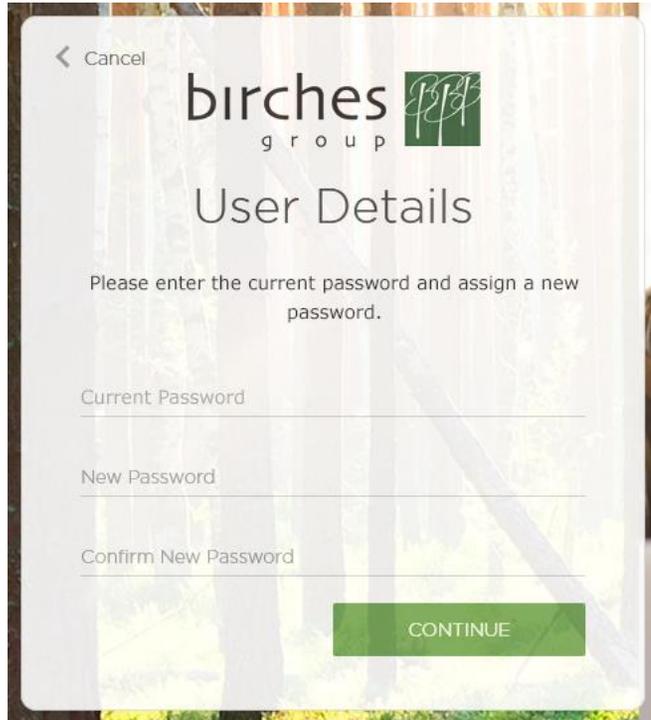
How to Login Using Microsoft Authenticator App as Verification Method

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>

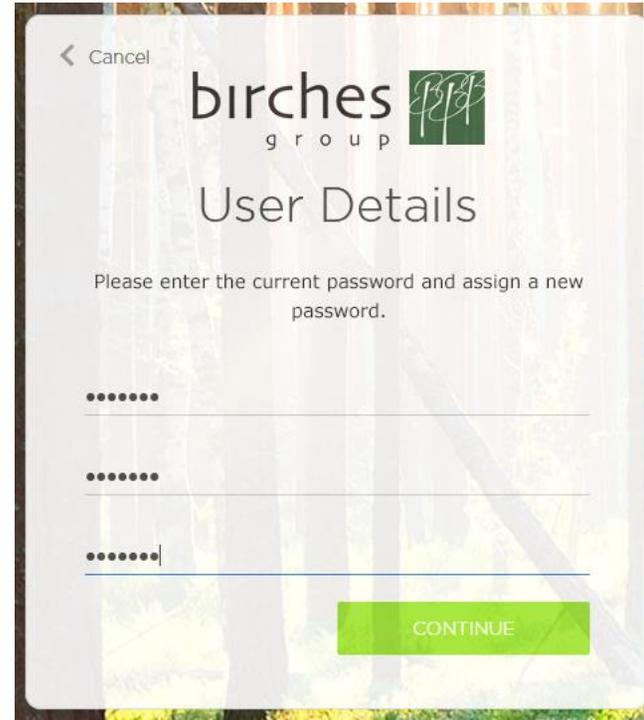
1. Type in your BG Account registered email address and select **MS Authenticator App** as verification method. Click the **Proceed (Sign-in in Indigo)** button.
2. Type in your BG Account password and click the **Sign In** button.



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



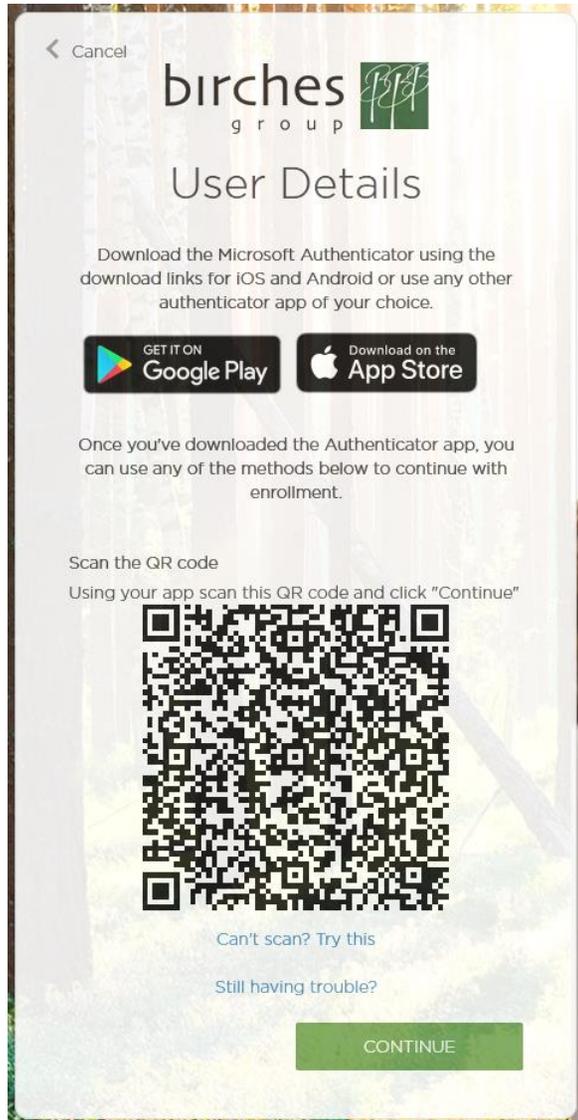
4. Enter your new password on the **New Password** and **Confirm Password** fields, then click the **Continue** button to proceed.



**New password requirements:*

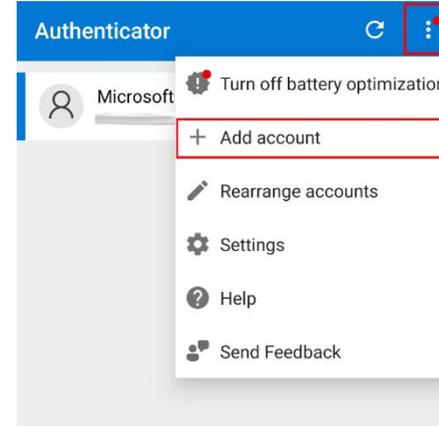
- *At least 8 characters*
- *At least 1 uppercase letter*
- *At least 1 number*
- *At least 1 symbol*

5. Wait until you see the following screen:

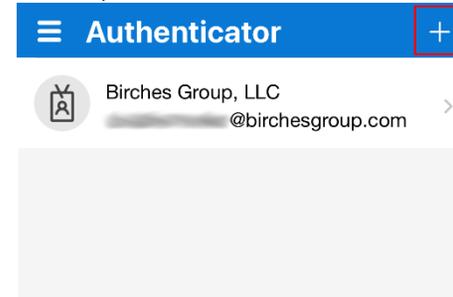


6. Open **Microsoft Authenticator** app in your phone, and in the upper right corner, select the **3-dotted** menu icon (for Android) or + menu icon (for iOS):

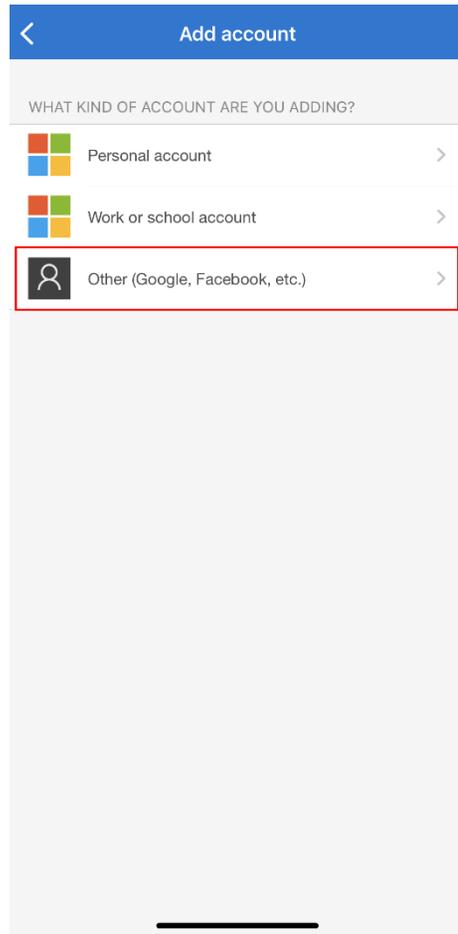
For Android, select **+ Add account:**



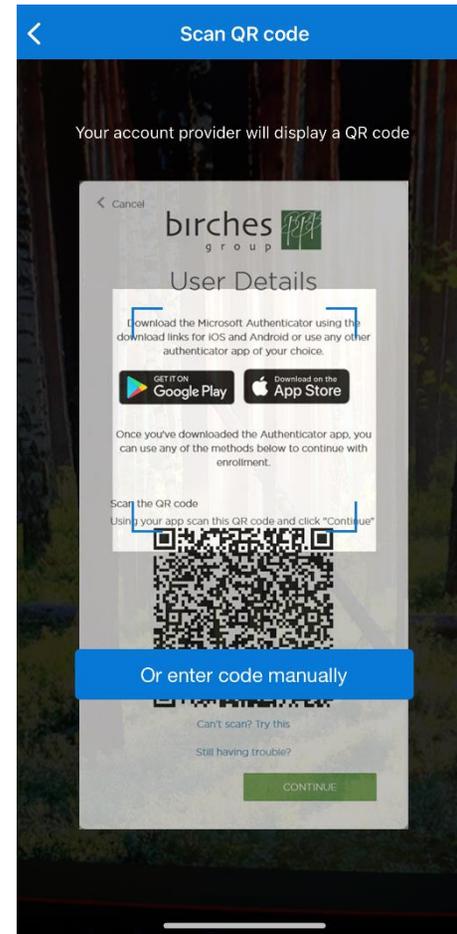
For iOS, select **+**:



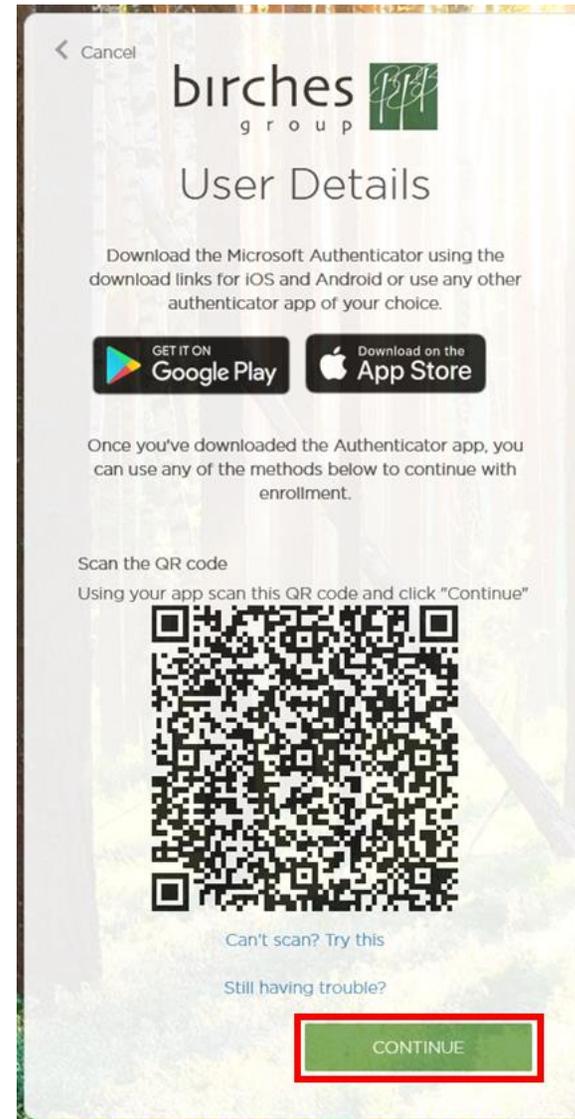
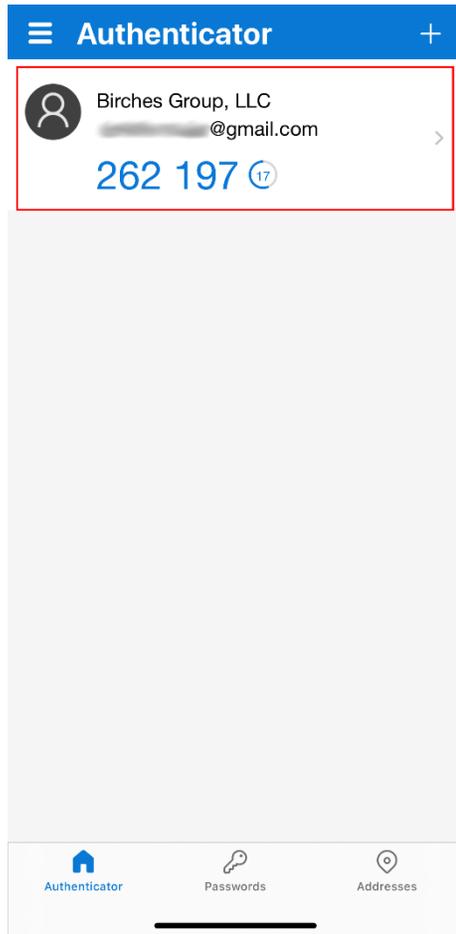
7. Select **Other account (Google, Facebook, etc.):**



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

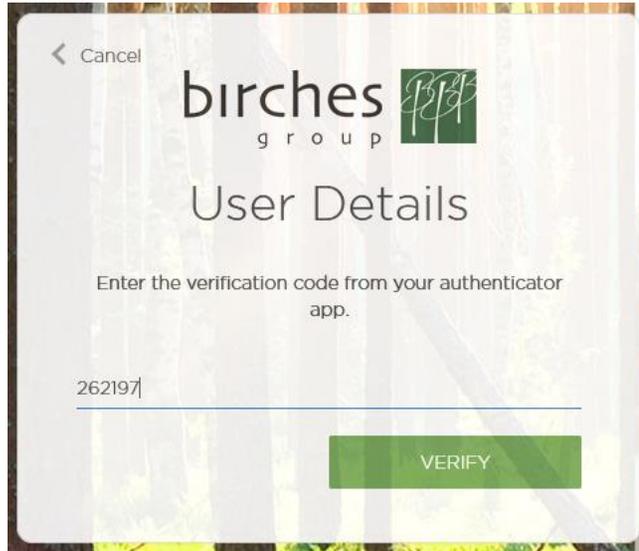


- 9. You should be able to see a new **Birches Group, LLC** account with your registered email in your Microsoft Authenticator app:
- 10. Back to Indigo or Community™ website, select **Continue** to proceed:



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**.

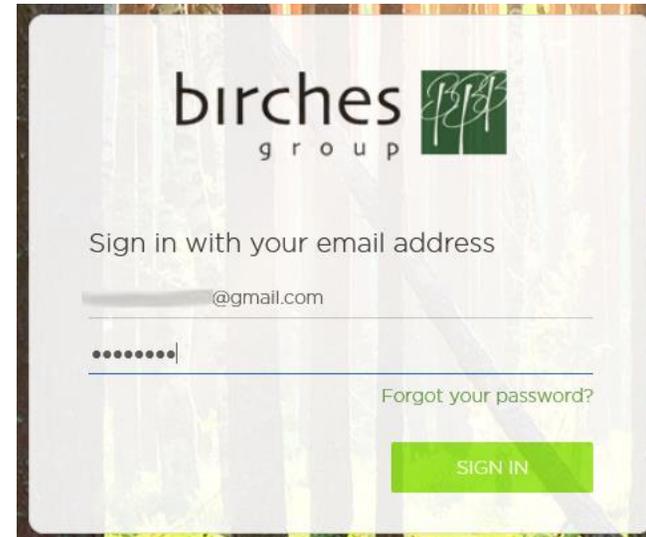
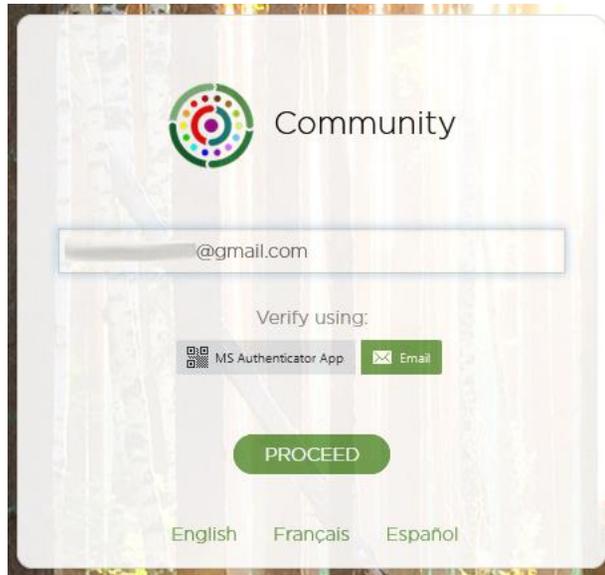
After manually adding Birches Group, LLC account to your Microsoft Authenticator app, **proceed to Step 9** of this user guide.

Succeeding Logins

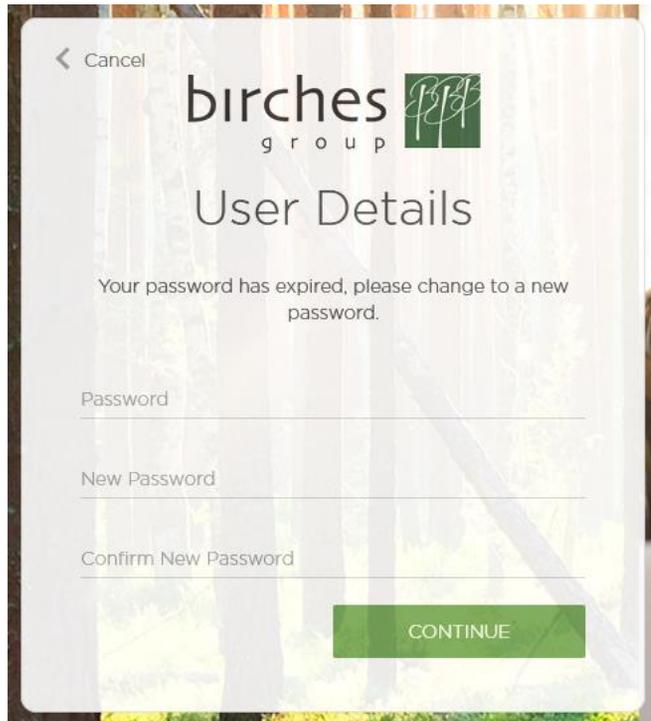
For succeeding logins using Microsoft **Authenticator** app as your verification method, **Steps 3 to 9 are skipped**. Total steps: 4.

How to Login Using Email as Verification Method

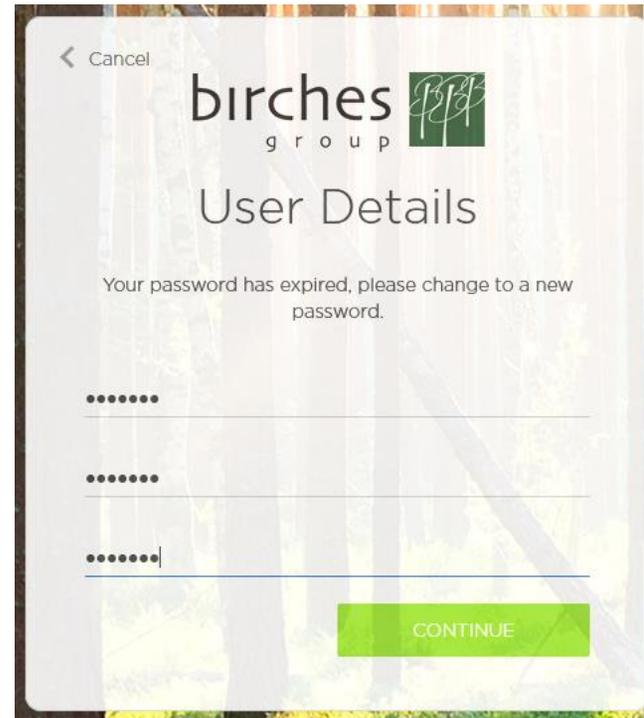
1. Type in your BG Account registered email address and select **Email** as verification method. Click the **Proceed (Sign-in in Indigo)** button.
2. Type in your BG Account password and click the **Sign In** button.



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



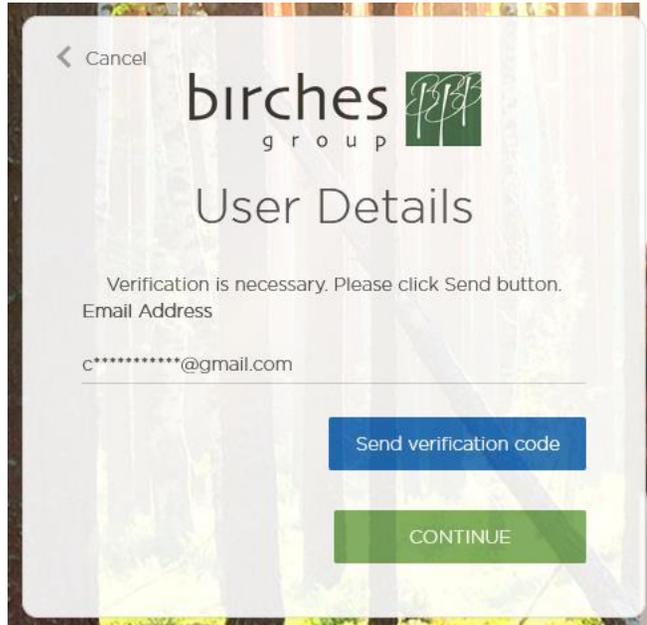
4. Type in your BG Account password, then enter a new password on the **New Password** and **Confirm Password** fields. Click the **Continue** button to proceed.



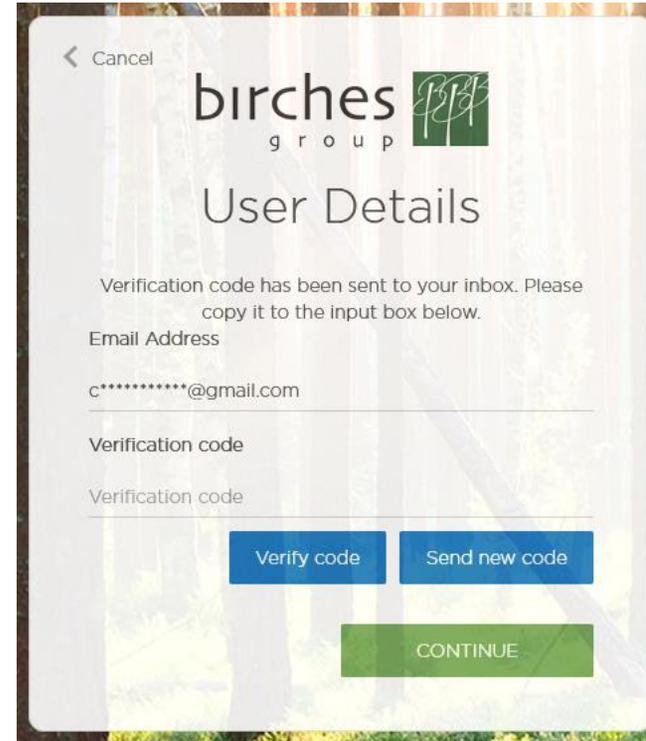
**New password requirements:*

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

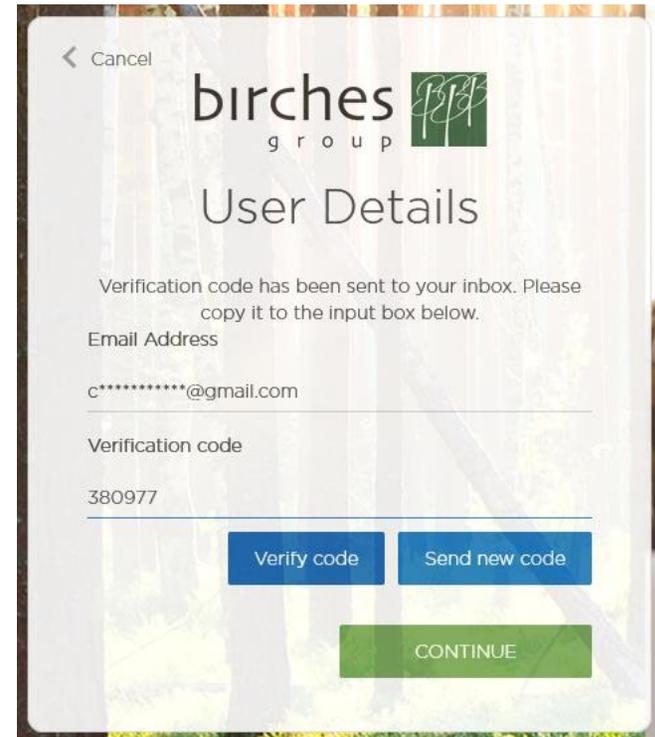
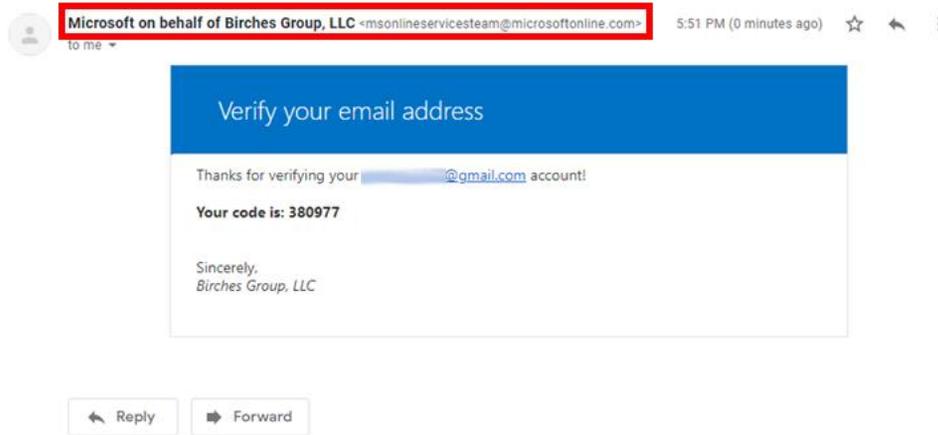
5. Wait until you see the following screen, and click **Send verification code** button:



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.

