



GUIDE DOCUMENTATION

Sign in and Authy setup

First time sign in and setting up the Authy authentication app



Salary and
Supplier Payments



Before you start

Authy is an mobile app you need to download and use every time you sign in and perform certain actions. It adds an extra layer of security to your access.

Authy authentication app

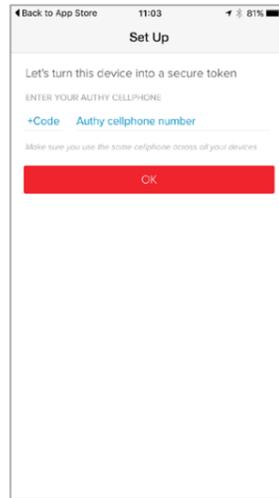


It's a good idea to download, install and register the 'Authy' authentication app from your app store **before** you begin setting up your access.

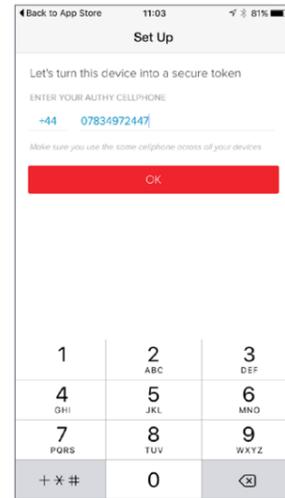


Users must download, install and register **in the Authy app** before using it in the customer portal.

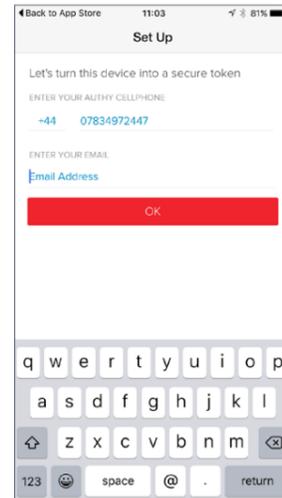
Setup screens:



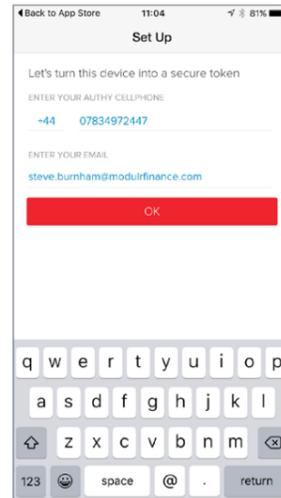
First setup screen



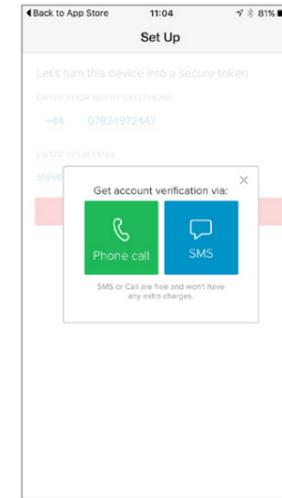
User enters mobile no*
* CANNOT BE A LANDLINE NUMBER



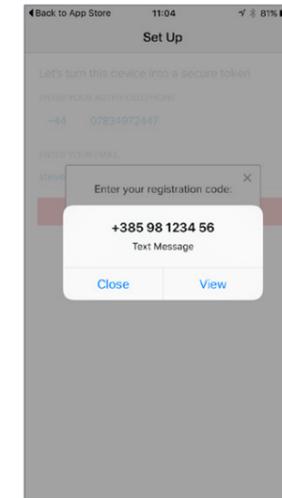
Request email



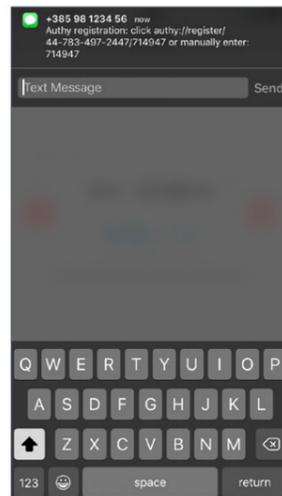
Enter email address



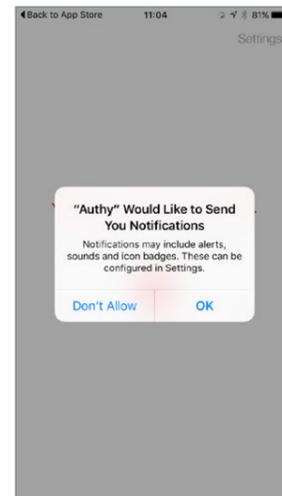
Choose how to receive verification



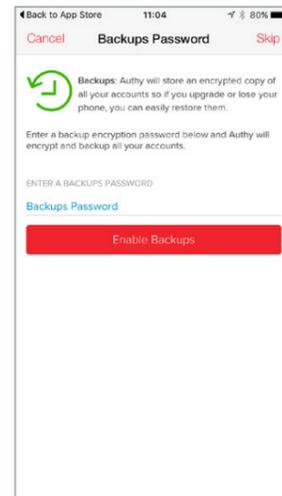
Receive SMS



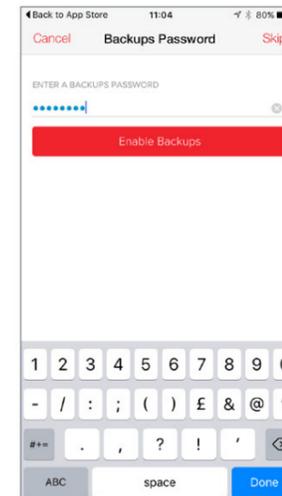
Message (click URL takes you back to app)



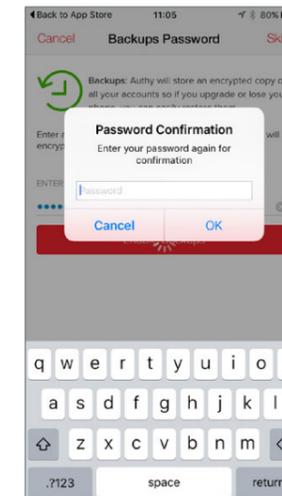
Allow notifications



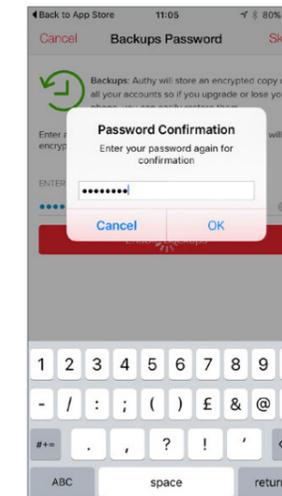
Request backups password



Create a backups password



Confirm password



Confirm password

1. New users of the customer portal will receive this email

sage

Welcome to the Salary and Supplier Payments platform

Your Salary and Supplier Payments user account has been set up and is waiting for you to complete a quick security setup.

The **Sign in** button below will take you to a secure area on our platform where you will be prompted to sign in with your Sage ID. Then you'll be asked to set up 2-factor authentication before you get access to the portal.

Important Note
The link will expire once used (for security reasons) so make sure you are ready to **complete** sign in once you click it. It will also expire if used over 48 hours from when it was first issued. Please contact support if you are having trouble signing in.
sagesupport@modulrfinance.com Tel: 030 3313 0063.

Security
To add an extra layer of security when you sign in (requested periodically), or use some features, you'll be asked for a quick approval using an app on your mobile.

AUTHY

Please download the free 'Authy' authentication app (available for **iOS** and **Android**) and follow the instructions to register.

Thank you

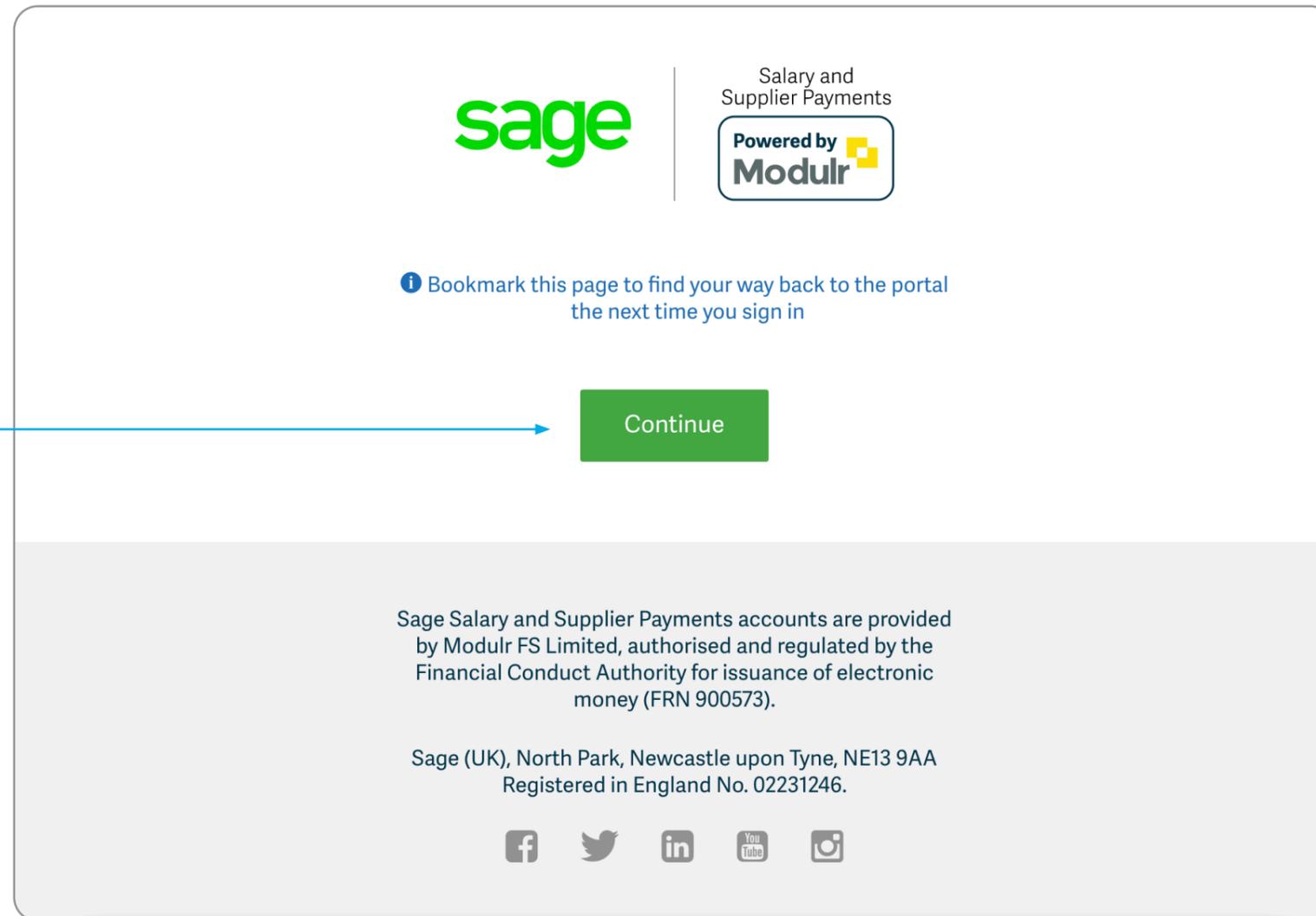
The Salary and Supplier Payments admin team

Sign in

The button contains a unique link that will take the user into the sign-up process



2. Sign in routing page



Users will be taken to this page, where they need to select 'Continue'.

It's a good idea to bookmark this page for the future.

3. Create Sage ID screen

If the user needs to create a Sage ID, they will be sent to this page where they just need to complete the details.

If the user **ALREADY HAS** a Sage ID, they will be asked to sign in with that.

Select the 'I'm not a robot' verification checkbox

Select register to continue

The screenshot shows the Sage registration page. At the top is the Sage logo. Below it is the heading "Create Your Sage ID Account" and a sub-heading "Your Sage ID helps keep your information secure." The form contains four input fields: "Email" (with a placeholder and a help icon), "Name" (highlighted with a blue border and a help icon), "Password" (with a help icon), and "Confirm Password". Below the fields is a reCAPTCHA section with an unchecked checkbox labeled "I'm not a robot" and a "reCAPTCHA Privacy - Terms" link. A blue "Register" button is positioned below the reCAPTCHA. At the bottom, there is a "Powered by Modulr" logo with the text "Salary and Supplier Payments" above it, and three links: "Privacy Policy", "Terms & Conditions", and "Visit our help centre".

4. Sage security questions

sage

English (UK) | Service Status

Pick Security Questions

If you forget your password, we'll ask you some security questions. Pick three questions and provide answers.

i Each answer must contain at least five characters.

First Question
What were the make and model of your first car?

First Answer
Ford Escort

Second Question
What was the first street you lived on?

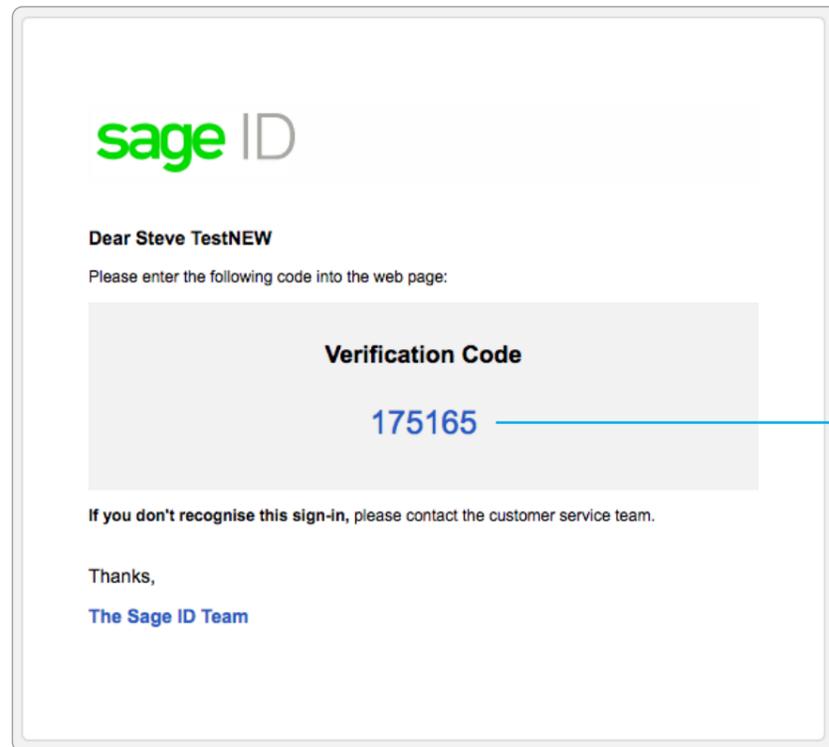
Second Answer

User selects three questions they want to use for their security profile.

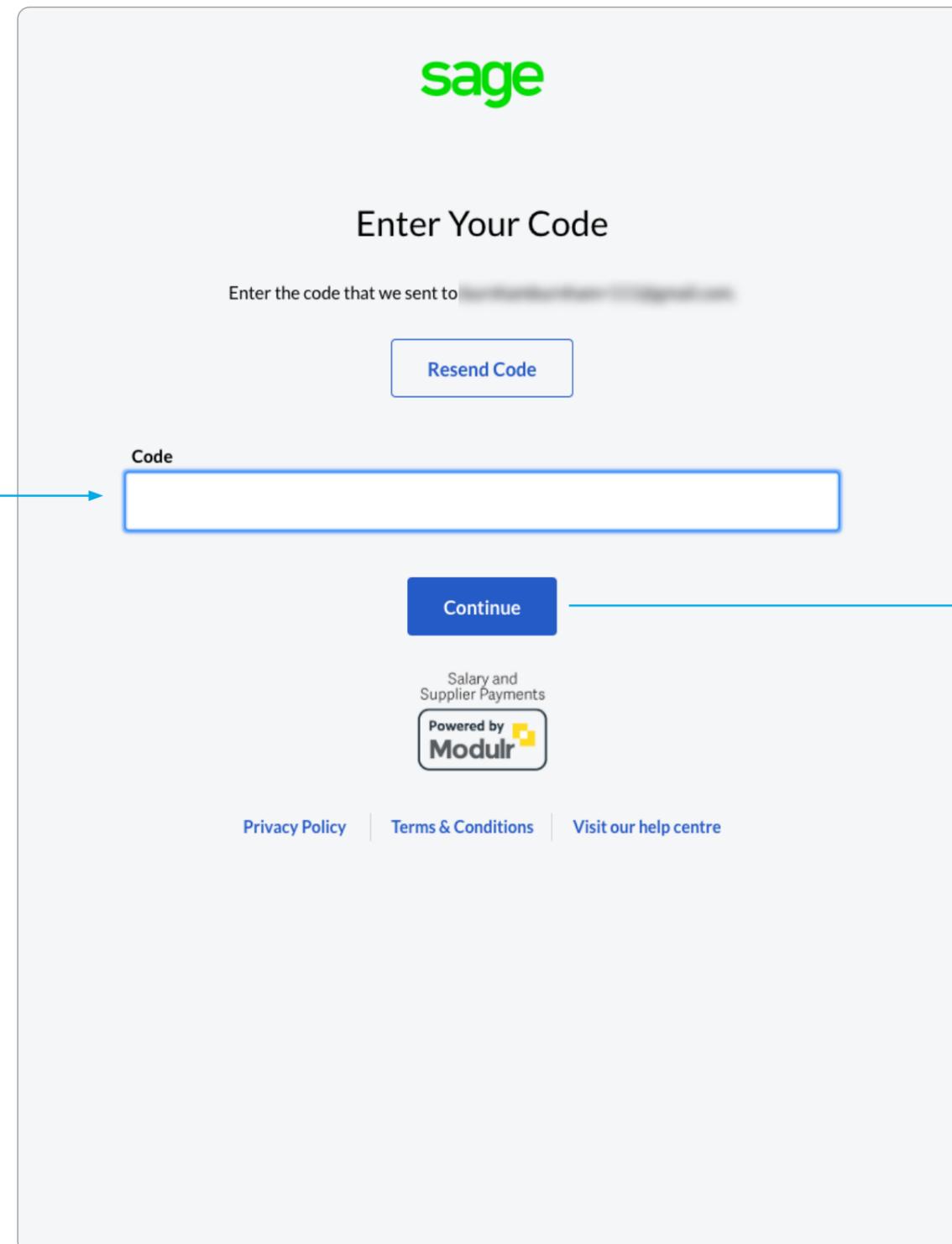
From time-to-time, on sign in, users will be asked to provide the answers.

5. Enter your code

User enters the code from their email from Sage into the screen on the Customer portal



Email from Sage to the user's email address



Select continue to the next step

6. Authy setup screen



Download 'Authy' app

To add an extra layer of security when you sign in (requested periodically), or use some features, you'll be asked for a quick approval using an app on your mobile.



1

Download the app on your mobile

2

Follow the registration process in the app
(make sure you agree to receive notifications)

3

Then click the button below to continue

You'll come back to this screen if you close your browser or if your session expires.

I've installed and registered the app

Users may have already downloaded and registered Authy with their phone, if so, they can move on to the next step.



Continues to the next step



7. Enter the mobile number used to register with the Authy app

Users need to enter their mobile number (not a landline) they **USED WHEN THEY REGISTERED IN THE AUTHY APP**. This will trigger a 4-digit code to be sent to the user via SMS, proving they have the phone in their possession.

sage

Enter your mobile number

Enter the mobile number you used when you signed up with Authy.

Then check your phone for a text message.

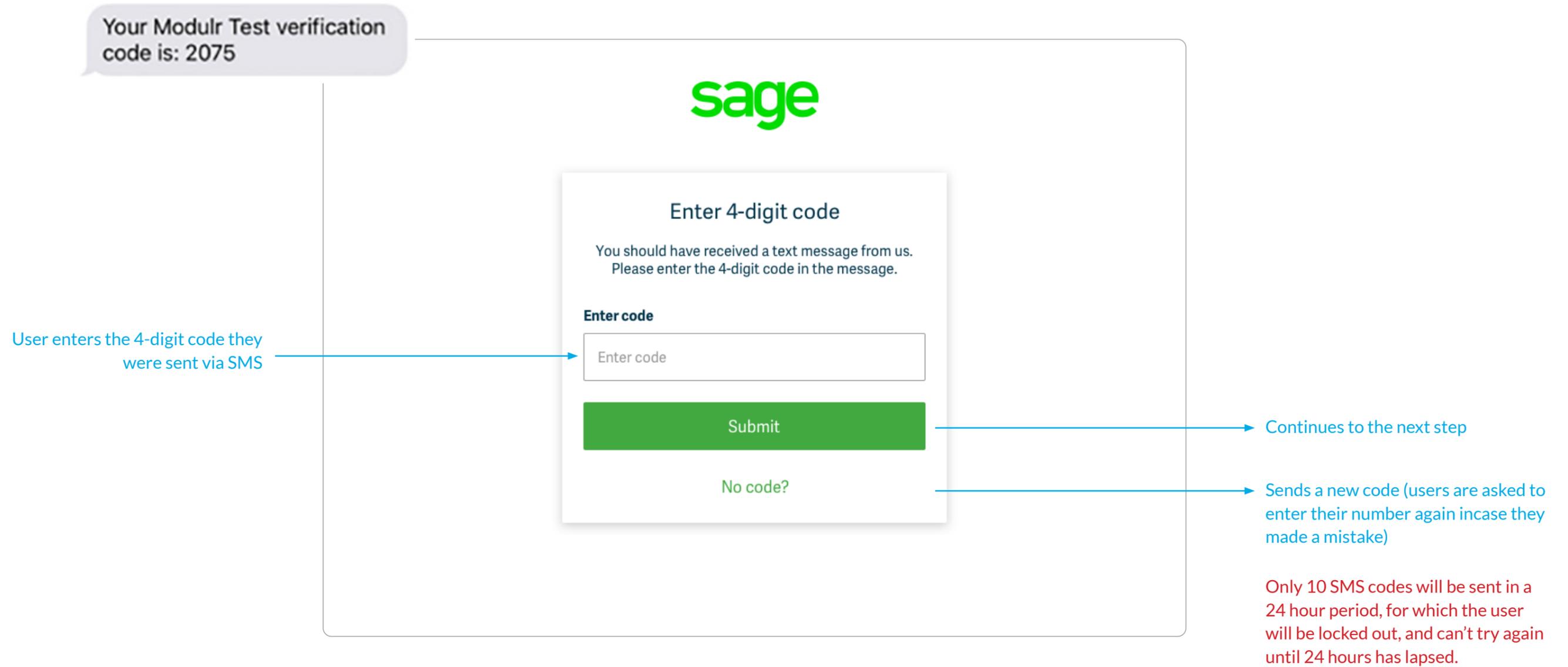
Mobile number

Enter mobile number

Next

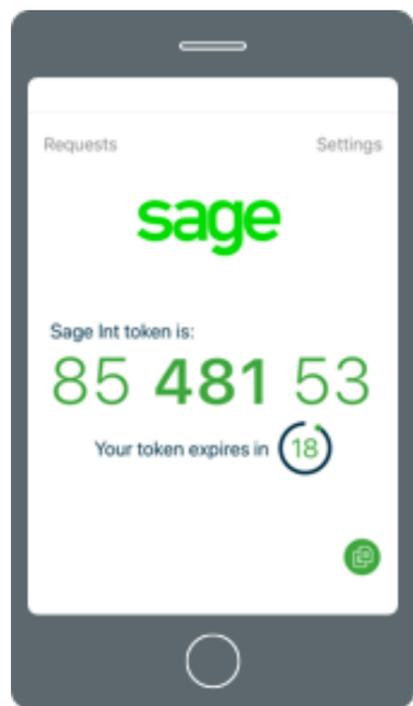
Continues to the next step

8. An SMS with a 4-digit code will be sent to the user's phone



9. Enter 7-digit code. The 7-digit code in the Authy app's main screen refreshes every 20 seconds. User must enter and submit the 7-digit code in time before it refreshes

Authy app main screen:



User enters the 7-digit code from the Authy app's main screen

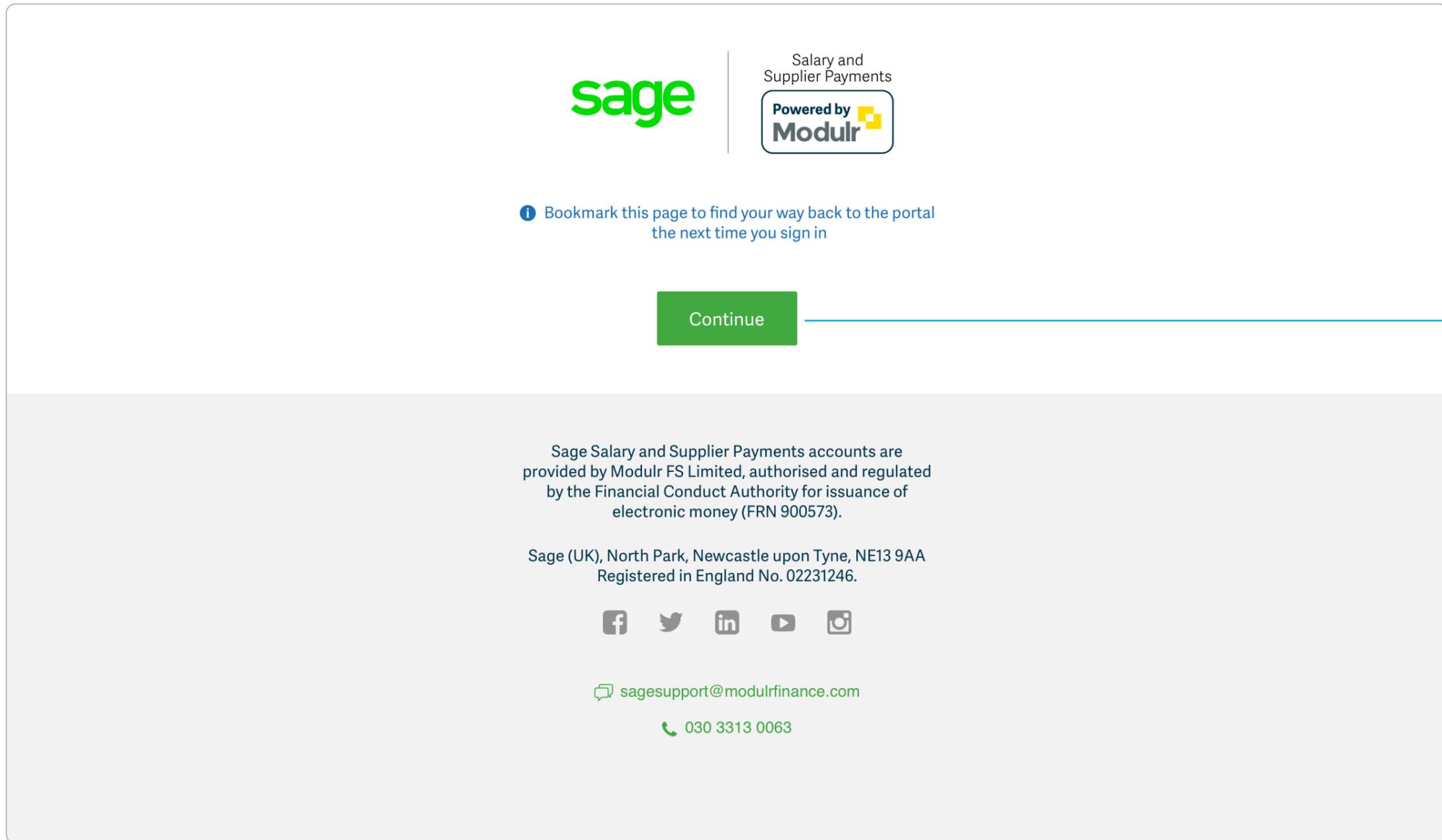
A screenshot of the Sage login screen. At the top is the 'sage' logo. The main heading is 'Enter code from Authy app'. Below this, it says 'Open your Authy app and enter the 7-digit code that appears on the home screen.' In the center, there is a smaller image of a smartphone displaying the Authy app with the code '12 345 67'. Below the image, there is a text input field labeled 'Enter Authy code' with the placeholder text 'Enter 7-digit code from Authy app'. A green 'Submit' button is positioned below the input field. At the bottom of the screen, there is a link that says 'I don't have Authy installed'.

Users only have 5 attempts at entering this code. If entered incorrectly more than 5 times, the user is locked out for 24 hours.

Continues to the Customer Portal

Select if user doesn't have Authy installed. Will be sent back to the first screen.

10. Users will then be taken to sign in with their Sage ID, and will receive a push notification on their device to then be fully authenticated



Directs to Sage ID sign in (Sage's screens)

11. User will then be signed in to the Customer Portal:

The screenshot shows the Sage Customer Portal interface. The top header includes the Sage logo, the company name 'System Systems Ltd', and the user name 'Lucy D'Zouza'. A left-hand navigation menu lists various options: Accounts (highlighted), Pending payments, Beneficiaries, Approvals (with a '46' notification badge), Reports, Users, and Notifications. The main content area is titled 'Accounts' and features a search bar with the placeholder 'Enter an account name or ID' and a 'Go' button. To the right of the search bar is a 'Sort by' dropdown menu currently set to 'Account ID (a-z)'. Below these elements is a table displaying account details.

| Account ID | Account | Alias | Identifier | Currency | Balance |
|----------------|--------------------|--------------------------|---------------------|----------|-----------|
| 00000000000001 | System Systems Ltd | Master account | 12-34-56 / 12345678 | GBP | 12,908.00 |
| 00000000000002 | System Systems Ltd | Salary payment account | 12-34-56 / 12345678 | GBP | 29,678.00 |
| 00000000000003 | System Systems Ltd | Supplier payment account | 12-34-56 / 12345678 | GBP | 2,089.87 |

At the bottom left of the page, there is a link for 'About Modulr'.



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