



GUIDE DOCUMENTATION

Sign in and Authy setup

First time sign in and setting up the Authy authentication app



Salary and
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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

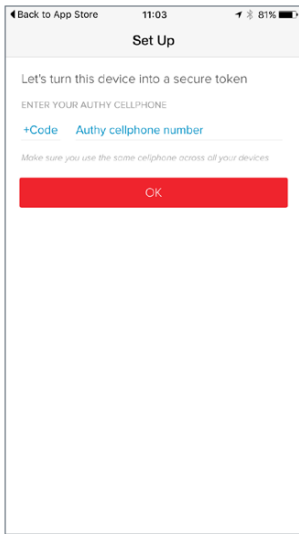


It's a good idea to download, install and register the 'Authy' authentication app from your app store **before** you begin setting up your access.

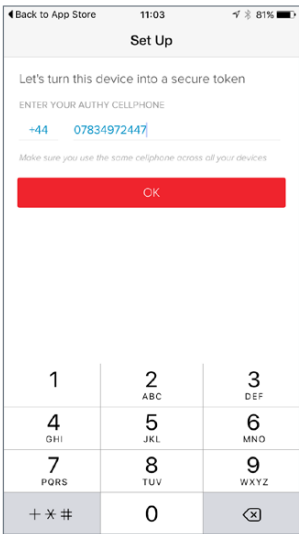


Users must download, install and register in the **Authy** app before using it in the customer portal.

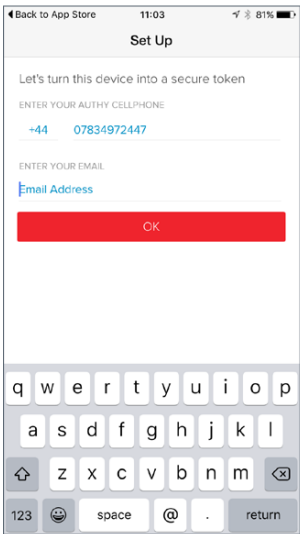
Setup screens:



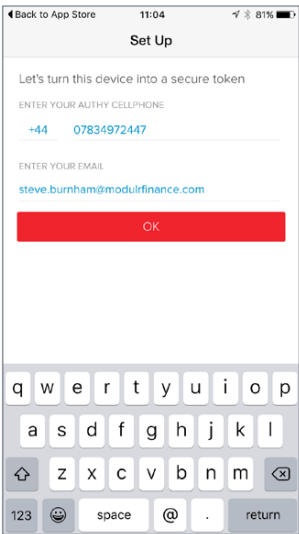
First setup screen



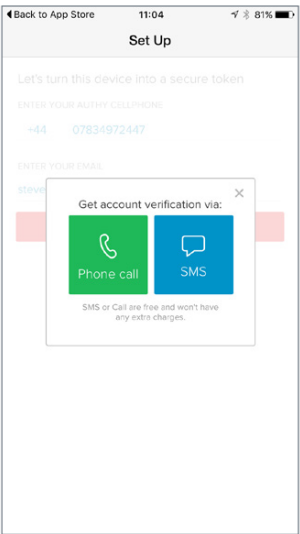
User enters mobile no*
* CANNOT BE A LANDLINE NUMBER



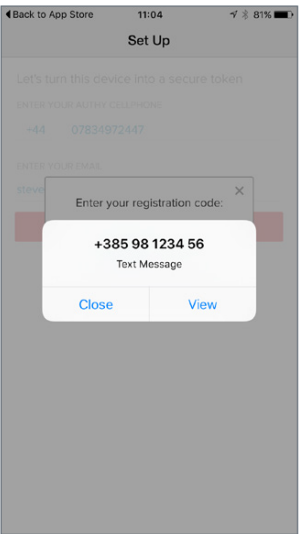
Request email



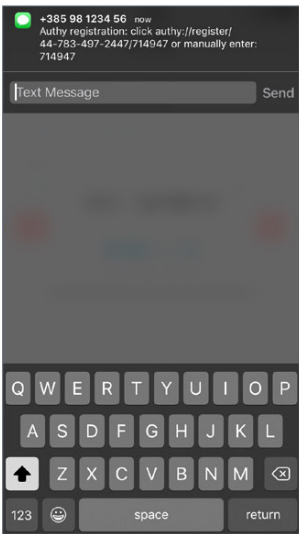
Enter email address



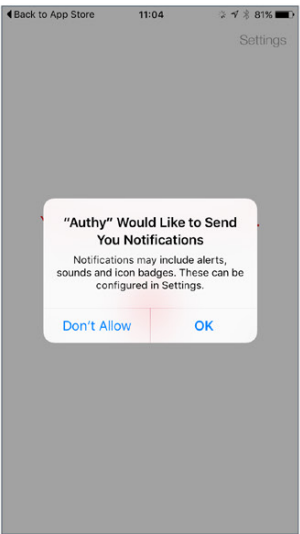
Choose how to receive verification



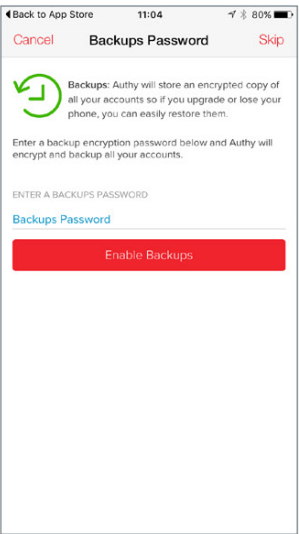
Receive SMS



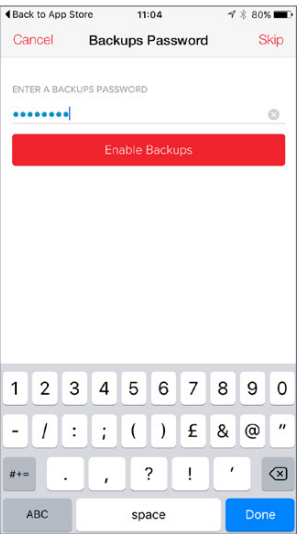
Message
(click URL takes you back to app)



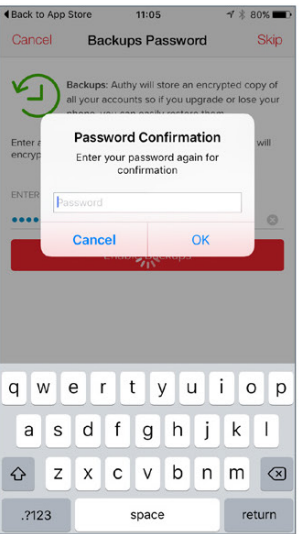
Allow notifications



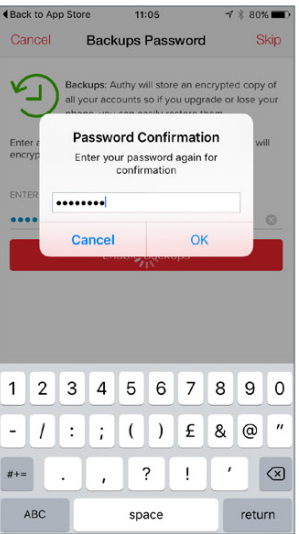
Request backups password



Create a backups password

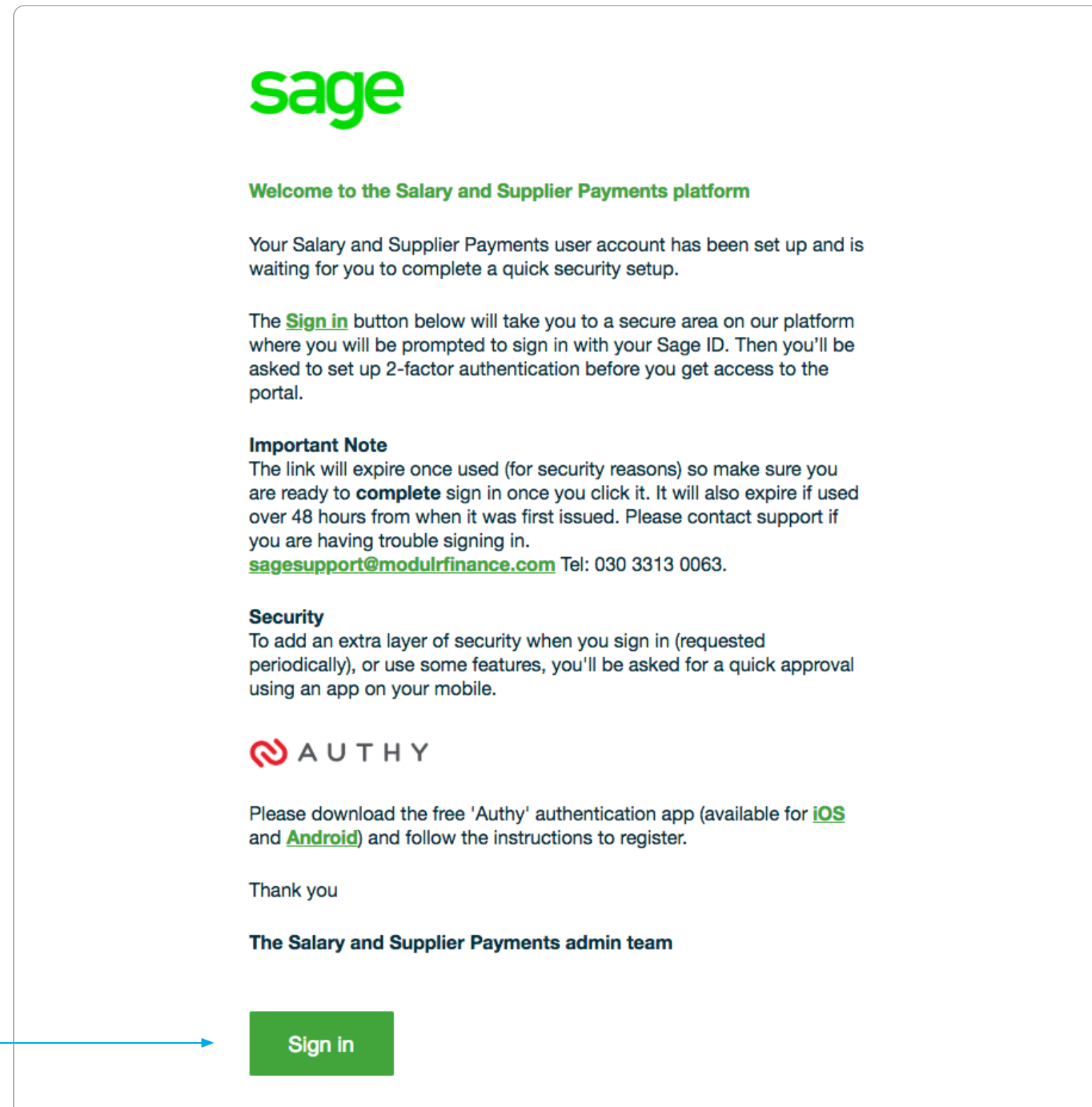


Confirm password



Confirm password

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

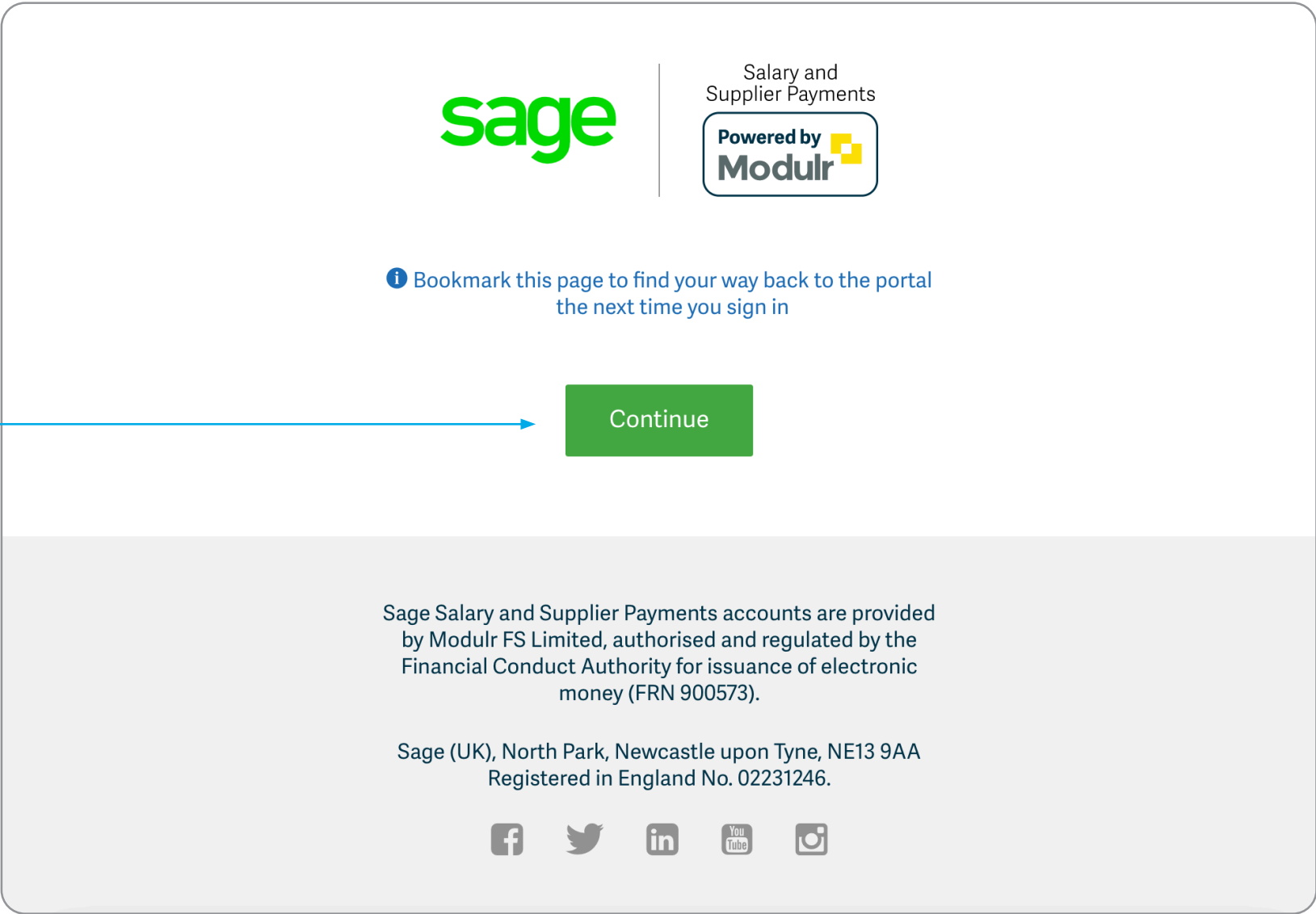


The button contains a unique link that will take the user into the sign-up process

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 futre.



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

sage

Create Your Sage ID Account

Your Sage ID helps keep your information secure.

Email

Name

Password

Confirm Password

☐

I'm not a robot

reCAPTCHA

Privacy - Terms

Register

Salary and
Supplier Payments

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Modulr

Privacy Policy

Terms & Conditions

Visit our help centre

Select register to continue

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.

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?

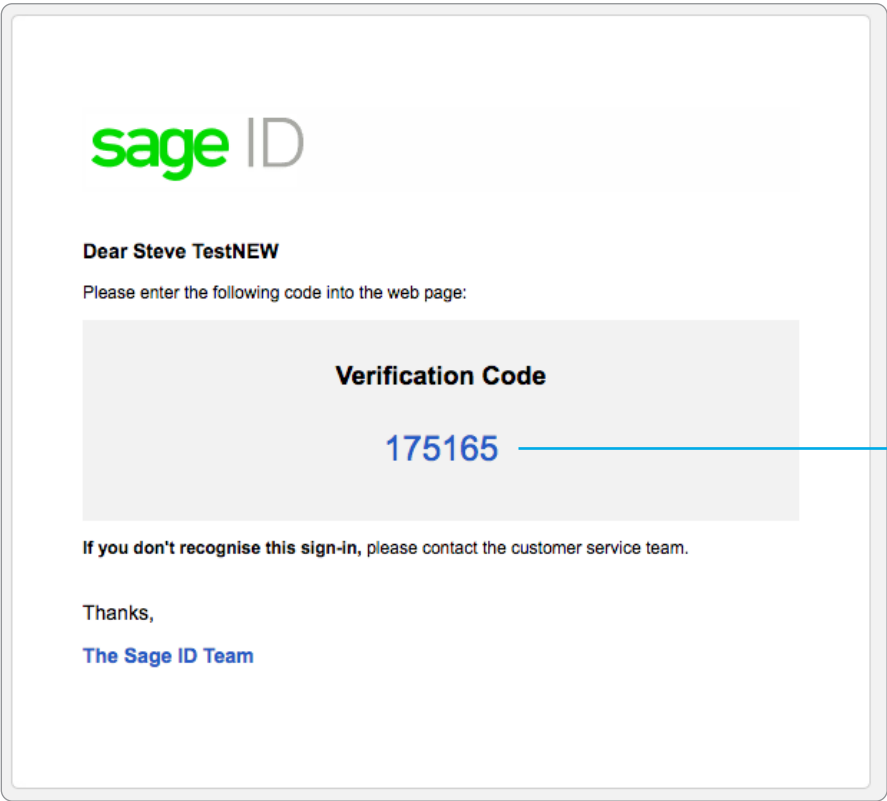
Second Answer

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

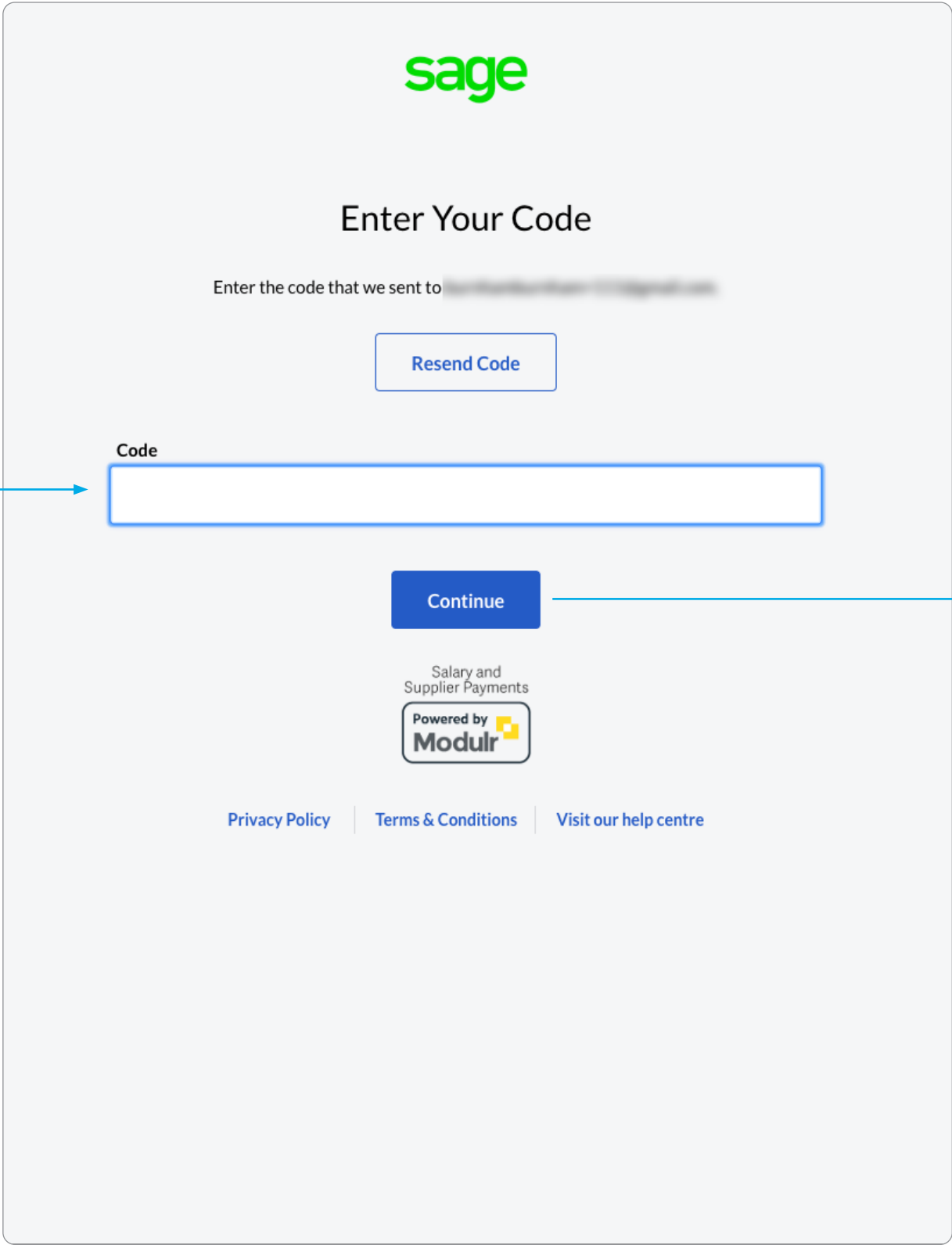
From time-to-time, on sign in, users will be asked to provide the answers.

5. Enter your code

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



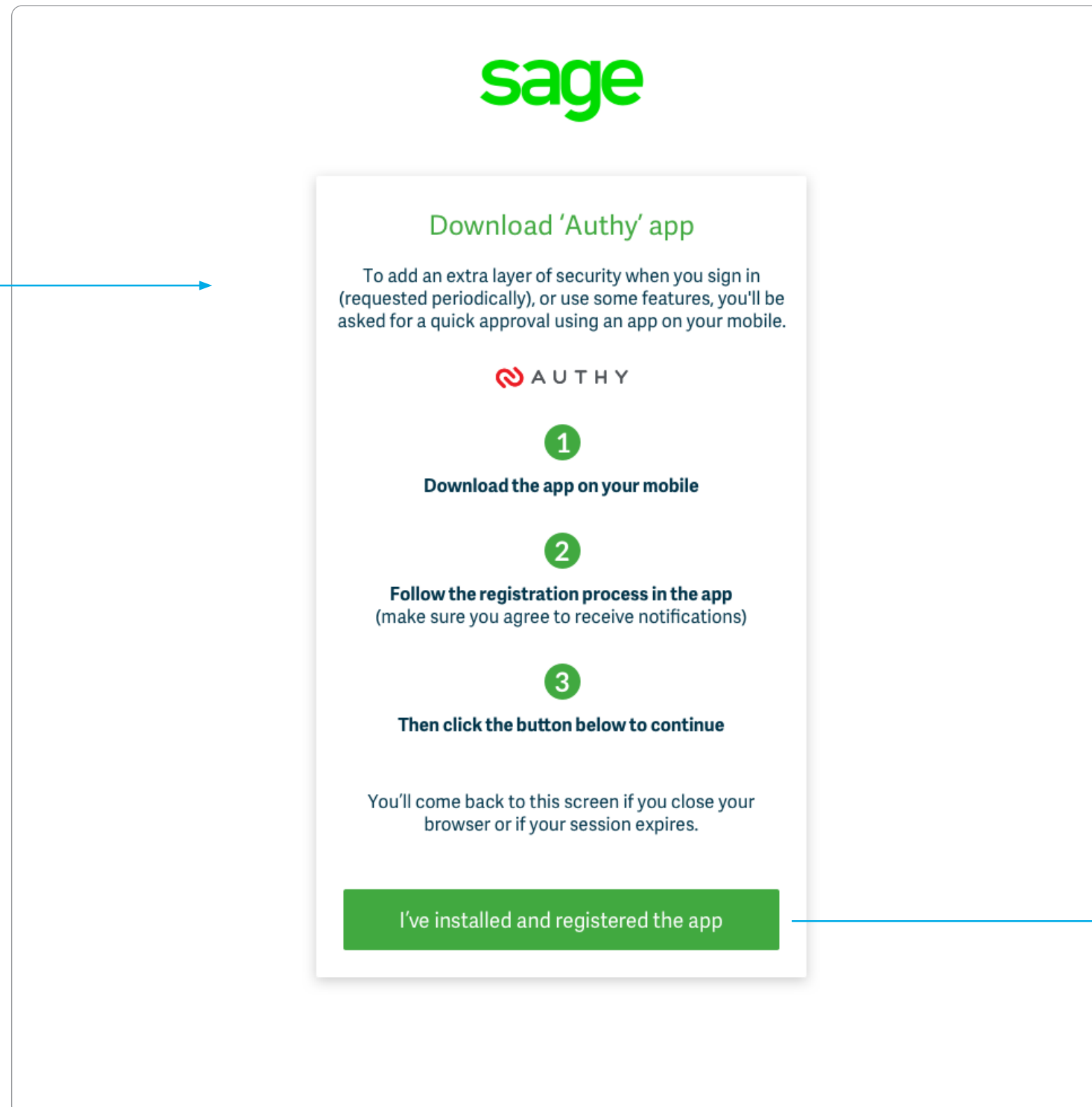
Email from Sage to the user’s email address



Select continue to the next step

6. Authy setup screen

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.

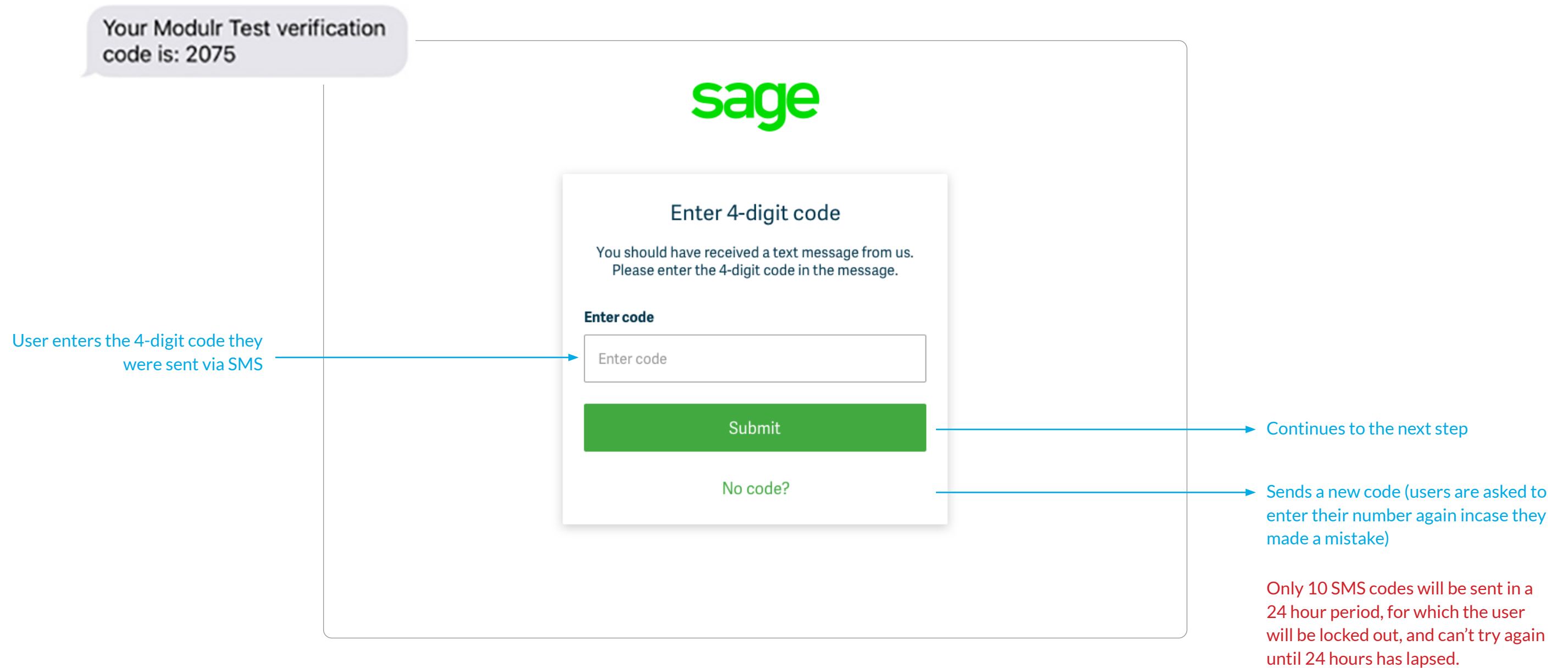
Mobile number

Enter mobile number

Next

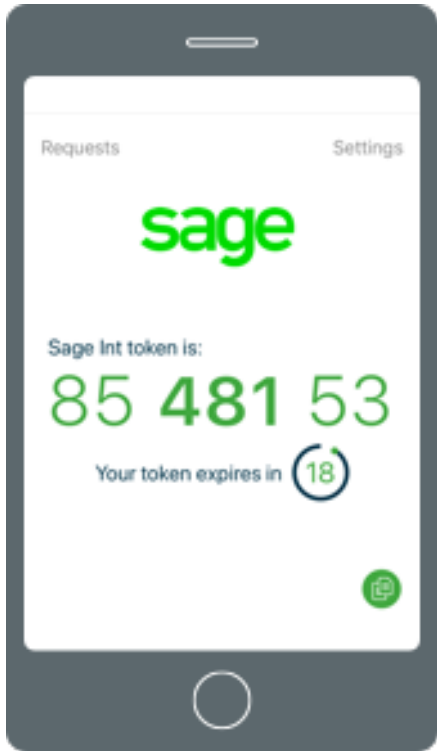
Continues to the next step

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

sage

Enter code from Authy app

Open your Authy app and enter the 7-digit code that appears on the home screen.

AUTHY

12 345 67

Enter Authy code

Enter 7-digit code from Authy app

Submit

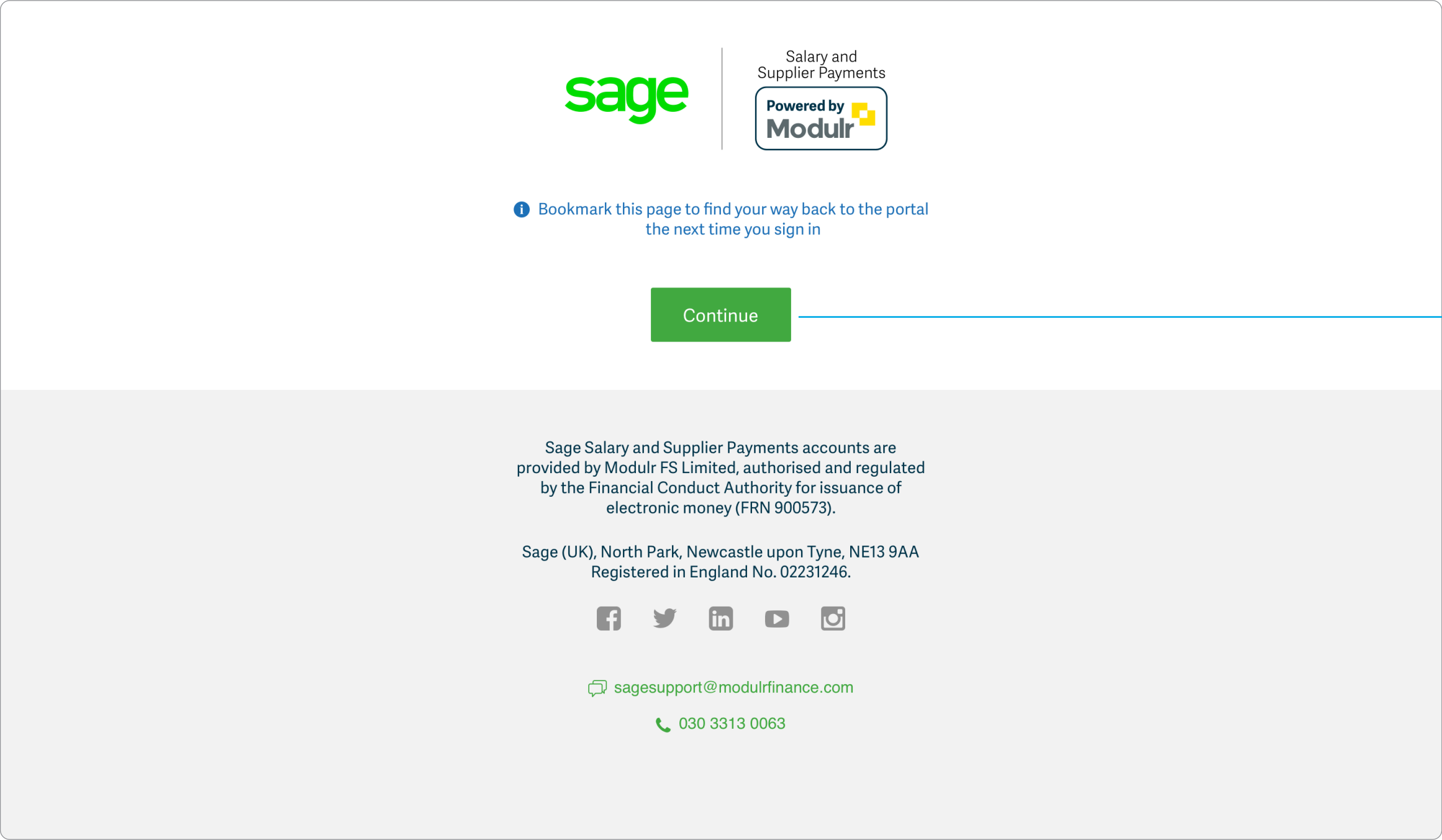
I don't have Authy installed

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



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

Accounts

Pending payments

Beneficiaries

Approvals46

Reports

Users

Notifications

About Modulr

System Systems Ltd

Lucy D'Zouza

Accounts

Search for an account by account name or ID

Enter an account name or ID

Go

Sort by

Account ID (a-z)

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



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