

Subject: Client Portal Impersonation (MFA Process)	Product: Client Success	Approved on:
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Purpose:

A new process has been established to set permissions to read-only when accessing the client portal through the COA internal login. This process includes mandatory Multi-Factor Authentication (MFA) for CS agents impersonating clients.

Policy:

- **Permissions:**
 - a. When accessing a client's portal using the COA internal login, permissions are automatically set to read-only.
- **MFA Requirement for CS Agent Impersonation:**
 - a. CS Agent Eligibility: Must be an active QuickBase user.
- **MFA Process:**
 - a. The CS agent receives an MFA code.
 - b. The CS agent enters the MFA code to proceed with impersonation.
- **Internal Login Credentials Format:**
 - a. **Username:** agentname@clearoneadvantage.com;edflores@clearoneadvantage.comclientemail@email.com
 - **Ex User Login:** *jlewis@clearoneadvantage.com;johnd@yahoo.com*
 - b. **Password:** ba2Fd#@3Fu65

*****Important:*** Please ensure you use your company-provided email address when logging into the client portal, as the MFA code will be sent **ONLY** to that email.

mnorman@clearoneadvantage.com; allisonatherton@yahoo.com

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In the printed form this is an uncontrolled document. The official version can be found online.

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Procedure:

Client Portal Login:

COA Internal Log In username: agentname@clearoneadvantage.com;clientemail@email.com

Password: ba2Fd#@3Fu65

The screenshot shows the ClearOne Client Portal login interface. At the top, it says "ClearOne" and "Advantage". Below that is a large white box containing a circular profile picture of a woman and the text "Log in to Live Chat with a Client Specialist today!". To the left of the profile picture is the "Member Login" section with fields for "Email" (lhosain@clearoneadvantage.com) and "Password". To the right of the profile picture is a testimonial: "Ashley helped me in chat and was amazing. Great customer service, fast responses and resolved my issue in seconds." -Katon, followed by a Trustpilot rating of 5 stars. At the bottom of the white box are "Login" and "Forgot Your Password?" buttons.

CS Agent will receive (6-digit) MFA code via email:

The screenshot shows a "Multi-Factor Authentication" page. It asks for a passcode to verify identity and provides the recipient's email as "ce@clearoneadvantage.com". There is a text input field for the code, a green "Submit" button, and a link "Go Back To Homepage".

CS Agent view on Client Portal:

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Welcome, Alexx Benatui!

Please Consider Changing Password, Which Expires Today. Please Use 'Change Password' Option from the Main Menu.

You are in Read-Only mode: You do not have permission to make changes.

Home

- My Profile
- My Creditors
- My Banking
- My Drafts
- My Documents
- Customer Service
- Resource Center
- Change Password
- Log Out

Plan Summary

Bank Balance	\$127.54
Enrolled Creditors	4
Enrolled Debt	\$14,313.55
Settled Debt	\$1,810.00
Next Draft	11/20/2024
Next Draft Amount	\$269.81

Resources

- What to Expect?
- Checklist for Success
- How much should you save?

Welcome Video

Portal Walk Through

Important Reminders:

- **MFA codes are sending successfully. In most cases, delivery issues stem from clients not attempting to log in after resetting their password or inputting incorrect credentials.**
- **Avoid repeated reset attempts. Multiple password resets in a short time can cause system delays and confuse both the agent and the client. Please:**
 - Confirm the client has exhausted all recovery options before manually generating a passcode.
 - Attempt only one password reset unless there's a confirmed issue.
- **Support clients in locating MFA codes. Remind them to:**
 - Check their spam, junk, and promotions folders.
 - Search their inbox for: "Your recent portal activity."
- **If still unresolved: You can provide the client with a system-generated passcode from the Client Files section to complete the reset process.**

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