

# User Guide Document for Two Factor Authentication

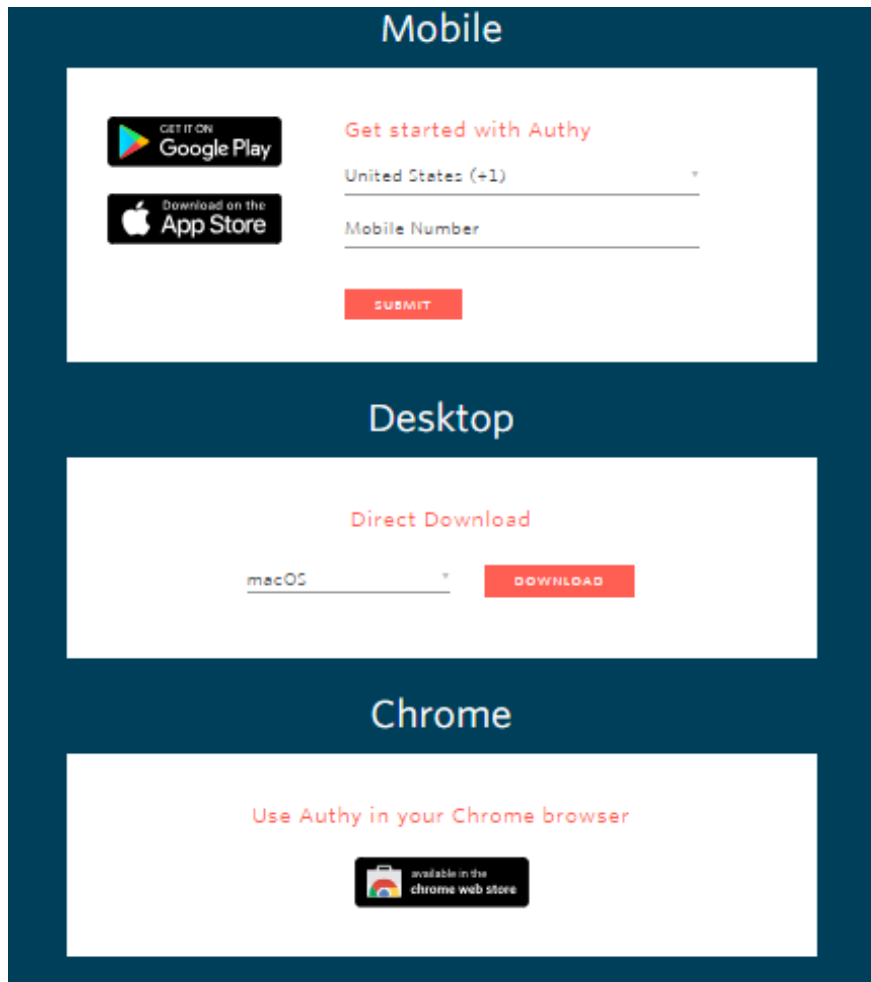
*“In the age of GDPR and more digital legislation coming, it is vital you keep your organization secure too – to show you’ve taken all reasonable steps to protect your customer’s data.”*

Two-factor authentication is a form of multi factor authentication where a person confirms their identity using two different pieces of evidence.

**Let’s get started!!**

**STEP 1: Install AUTHY APP on your mobile/desktop from [here](#) if not have.**

Create account on Authy app with your mobile number which you will going to use as 2FA in CRM and where you can receive text.



## Type of Authentication:

We have 3 different ways by which user can enable 2FA.

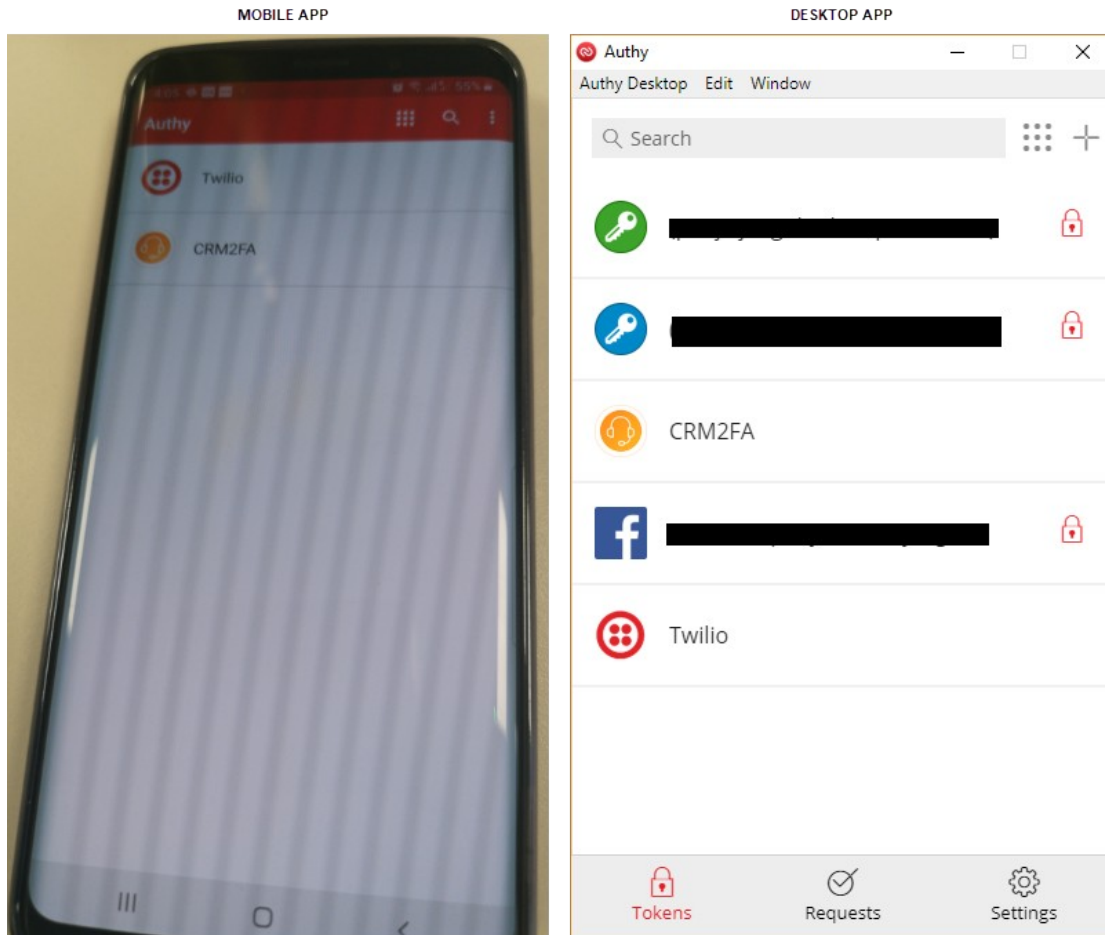
**SMSTOKEN**: - User will get a security code on registered phone number or in Authy App (if installed with same mobile number).

**VOICECALL**: - User will get call on registered phone number which they use at time of 2FA enable.

**ONETOUCH**: - System will send a push notification request which will alive for 30 seconds only. User can approve the request to login in CRM and as soon they approve CRM will auto login.

**NOTE:** If mobile number in authy app is not same as added in CRM then you will not be able to login. Please contact to management or see IT person.

Once you install app, it will look like below with zero account with you are using this for first time.



**STEP 2: Register your mobile number to CRM to authenticate.**

**Open Journey URL** <https://www.journey-crm.co.uk/>

Enter your username and password and press 'Log In'

# Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

## LOGIN TO YOUR ACCOUNT

Username

pooja.jangid@dotsquares.com



Password

.....



Log In

[Forgot your Password?](#)

You will get below screen which is for authentication register. This screen will come until you enable and configure 2FA.

### STEP 3: Enable 2FA

Continue: If you are ready to enable 2FA for CRM login. Press this.

Skip: You want to do this later then press this. Please remember this will allow you to SKIP only for 15 days from the day it's live. This will allow you to login in CRM normally.

## Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

### Enable Two Factor Authentication

2 Factor Authentication is integrated within Journey CRM. Please enable your 2FA login before DD-MM-YYYY to avoid blocking your login and install **Authy App** from here

A help guide can be downloaded from here 

You must be registered with a mobile number for enabling the 2 Factor Authentication

Continue

Skip

**If you pressed CONTINUE:** you will get below screen where you will be putting your mobile number which you have used at time of Authy App setup. Press continue after entering your mobile number.

## JOURNEY CRM


### ENABLE TWO FACTOR AUTHENTICATION

Choose your Country code

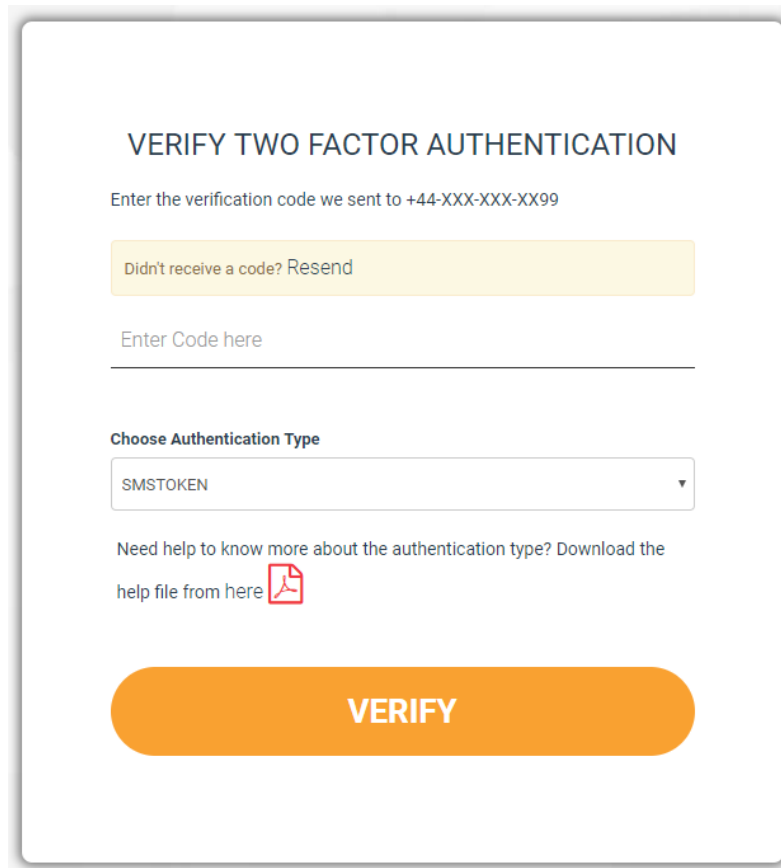
+44

Mobile Number

CONTINUE

Need help to know more about the authentication type? Download the help file from here 

When you press continue then below screen will appear



**Received text?** – you will be receiving a text from Authy app which will have a security token which will be used to complete the authentication

Enter your 7-digit token and choose your authentication type preference from below

- **SMS Token (recommended)** – A token will be pick from Authy App which will active for 30 seconds and keep regenerating a new token. You need to enter that token in Journey CRM to authentication before entering in.
- **One Touch (recommended)** - This is push notification which will send a push notification to Authy app. You can approve it to login in CRM and it will auto login into Journey CRM.
- **Voice Call** – you will receive a token on phone call, which you will be entering in Journey CRM.

Vola!! You have setup your 2 FA authentication for CRM.

If you've chosen SMS Token:

Login in your Authy App (mobile or desktop). You will see a new app added with name CRM2FA with an orange icon. This application will be used to get token. Token will work only when you use SMS Token.

Now, open you journey URL and enter your email and password. You will get below screen when you press Log-In

# Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

## TWO FACTOR AUTHENTICATION

Enter the verification code we sent to +44-XXX-XXX-XX99. This call will be ignored. If you are using Authy app please enter current passcode as a OTP.

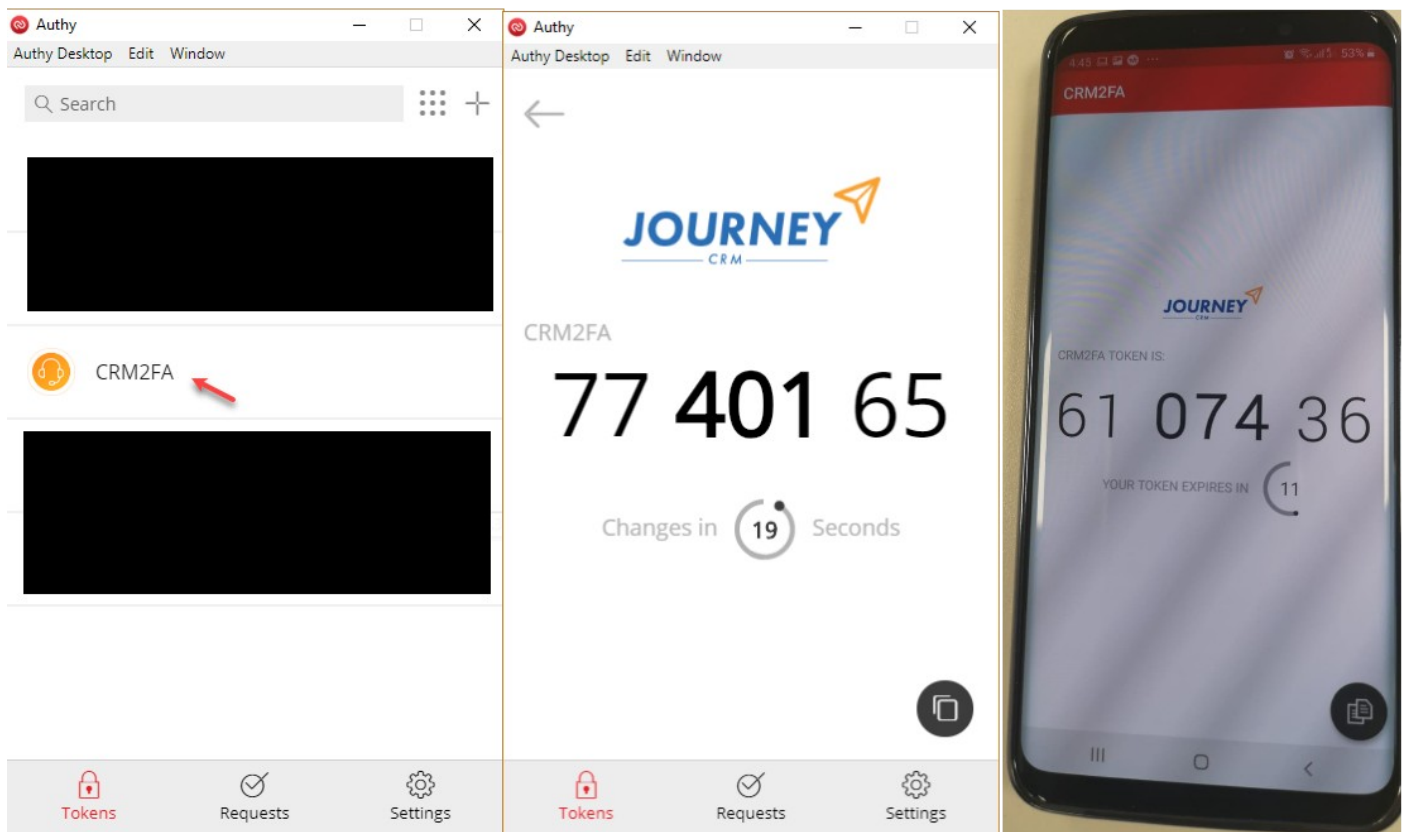
Didn't receive a code? Resend

Code

Verify

This says that token is sent to your mobile but you are using Authy app so SMS will not send. You will need to open CRM2FA app from Authy and enter token 7-digit token number which showing in that. Please press enter before the token expire else system will give error of invalid token.

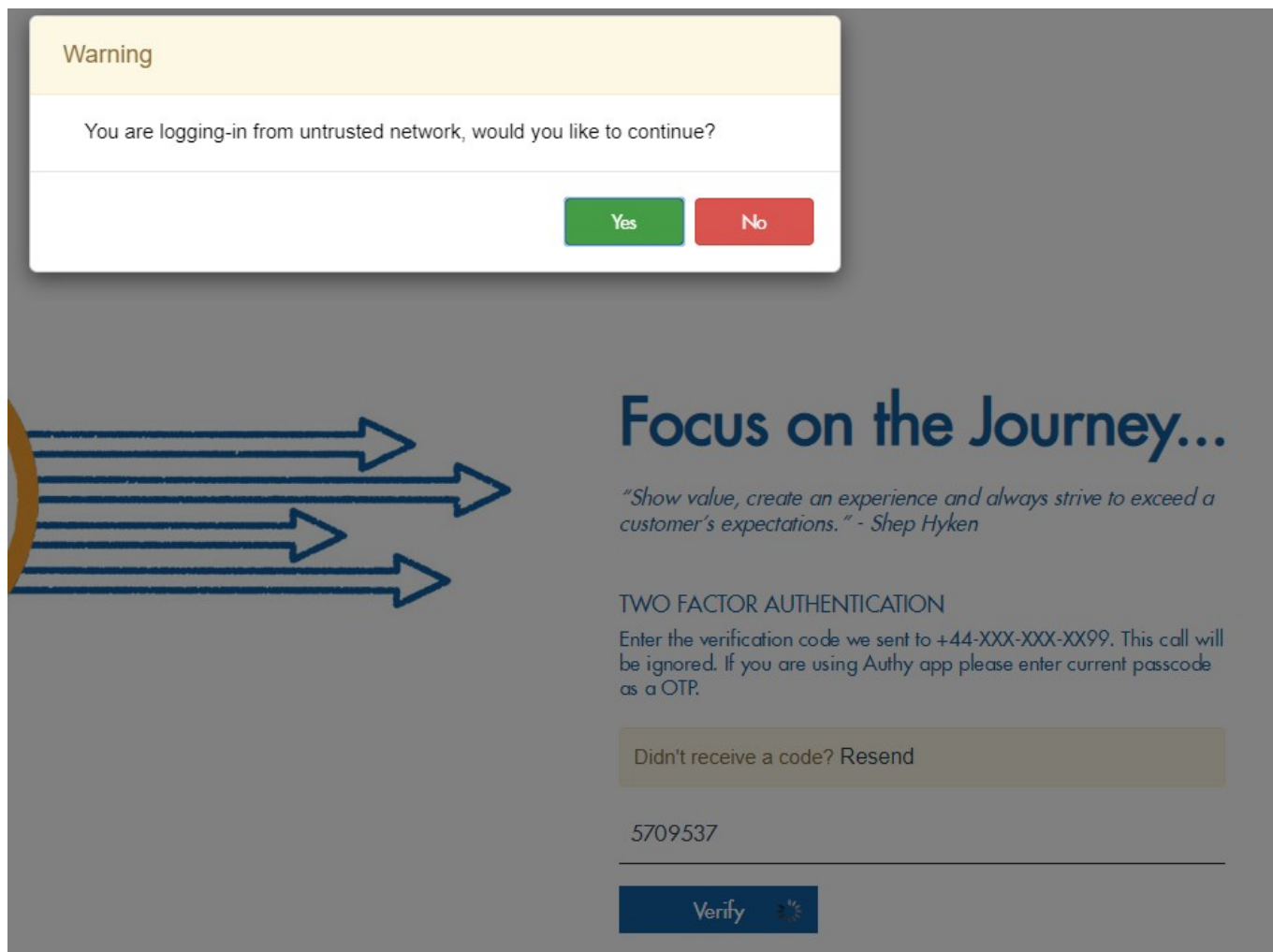
I share a screenshot for token screens for both desktop and mobile version app below.



When you will enter token and its validation then you will be able to login into CRM.

You will be seeing a warning message pop-up when you will be login into CRM from outside the office network.

You can press this if you know you are working on safe network. On office network this will not be asked.



The image shows a warning dialog box and a login screen. The dialog box has a yellow header with the word "Warning" and a white body with the text "You are logging-in from untrusted network, would you like to continue?". It has two buttons: "Yes" (green) and "No" (red). The login screen has a grey background with a blue header "Focus on the Journey..." and a quote "Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken. Below the quote is the text "TWO FACTOR AUTHENTICATION" and "Enter the verification code we sent to +44-XXX-XXX-XX99. This call will be ignored. If you are using Authy app please enter current passcode as a OTP." There is a button "Didn't receive a code? Resend" and a text input field containing "5709537". At the bottom is a blue button "Verify" with a sun icon.

Warning

You are logging-in from untrusted network, would you like to continue?

Yes No

## Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

TWO FACTOR AUTHENTICATION

Enter the verification code we sent to +44-XXX-XXX-XX99. This call will be ignored. If you are using Authy app please enter current passcode as a OTP.

Didn't receive a code? Resend

5709537

Verify

If you've chosen OneTouch-

When you login in journey CRM then you will get below screen just after you press Log In button.

This means a push notification is sent to your authy app to approve the login. I have shared below a few screenshots that how it will look like -

## Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

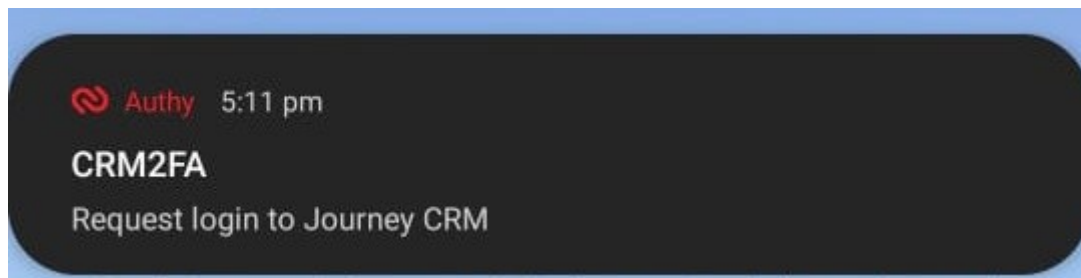
TWO FACTOR AUTHENTICATION



Waiting for *OneTouch* approval

As soon you see this screen, a push notification will be sent to your mobile/desktop app. This is how it will look like in both versions.

Mobile push notification-



When click on this it will open Authy App (ask for login in authy app first). Press approve to login in Journey CRM and denied if you didn't request this.

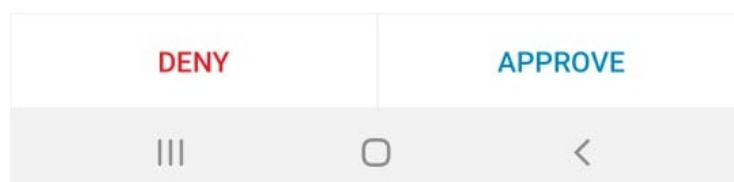


### Request login to Journey CRM

Please verify the information below. If you were not expecting this request, please click deny

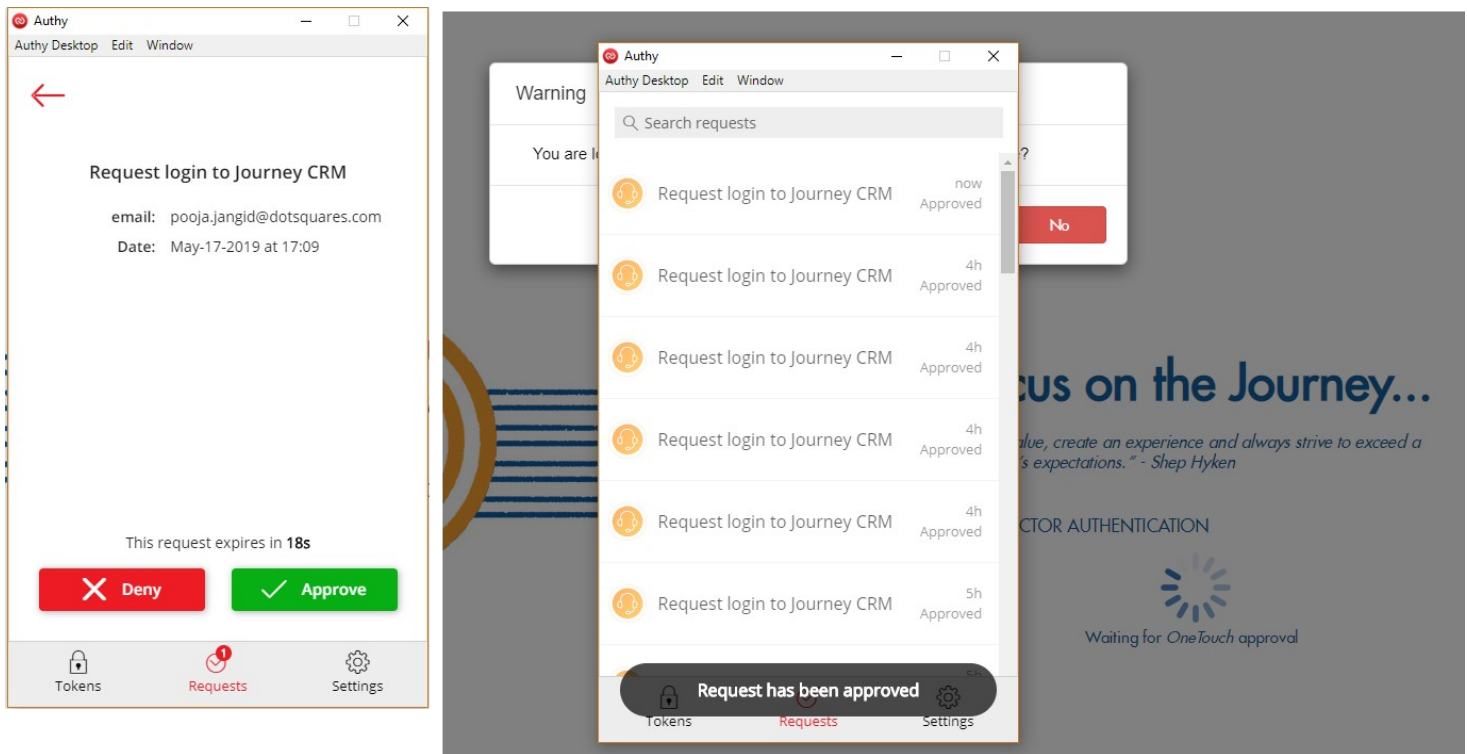
email: pooja.jangid@dotsquares.com

Date: May 17, 2019 at 17:11



**Step 1.2 B1 :-** If user chooses skip option then the user will be logged into the system without 2FA.

Desktop push notification will come where you have setup notification. Default it come at right bottom corner where time and calendar shows.



#### If you've chosen Voicecall:

Below screen will show after entering email and password into journey CRM. You will receive a call from Twilio Authy app which will share the security token. Please enter token here and press verify.



**JOURNEY**  
CRM

## Focus on the Journey...

*"Show value, create an experience and always strive to exceed a customer's expectations." - Shep Hyken*

### TWO FACTOR AUTHENTICATION

Enter the verification code we called +91-XXX-XXX-XX67 with

Code

☐ Remember this browser?

**Verify**



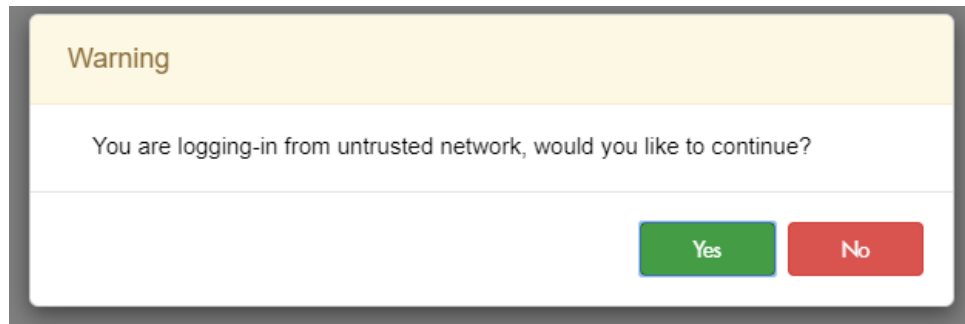
# FAQ

## What is untrusted network or IP?

Office IP's (network) added in trusted list which means they are secure and trusted network. So in office you will not be asking for this warning message.

But if you are trying to login outside the office IP (like, from your phone data, public wifi, home wifi etc) then this IP recognise as insecure network and Journey CRM will ask for confirmation before you login so security reasons.

You can login on untrusted IP by accepting the warning message. But we would not recommend until you are sure that you are login from trusted IP. So please do not login in CRM through public wifi unless its necessity.



You will be notify in email whenever you login on untrusted IP

Dear Pooja,

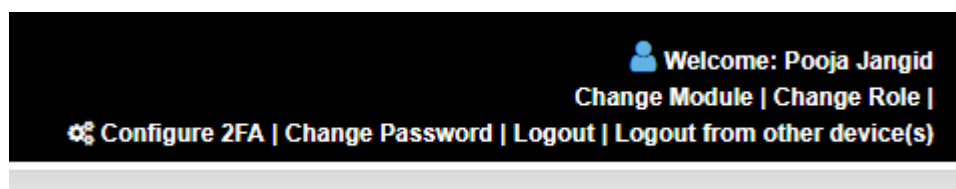
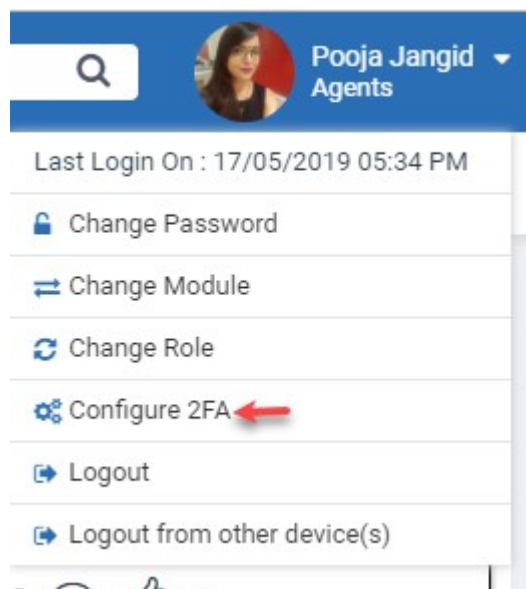
Your Journey CRM account was just signed with untrusted network.

If you would like to add your IP in trusted IP list then please raise a IT case with your network IP address or contact to IT team.

Thanks & Regards  
Admin

## Would you like to change your authentication type?

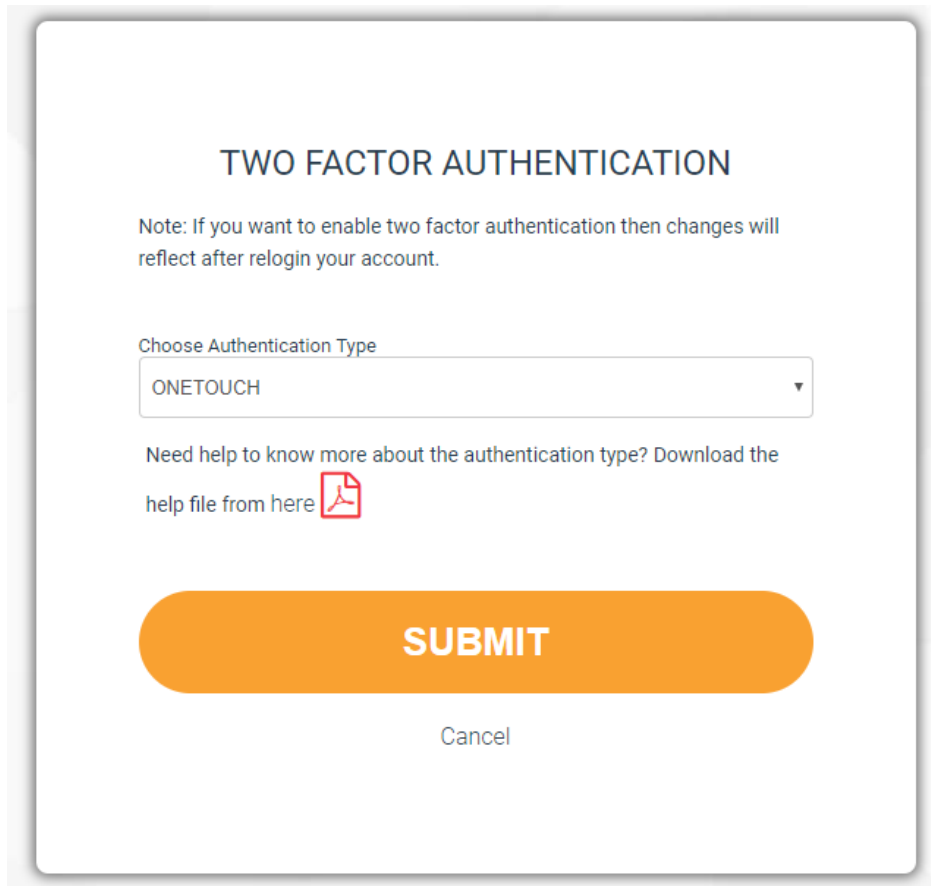
If you'd like to change your authentication type then you can do this from your user profile section.



Click on Configuration 2FA and it will take you to the same authentication screen which you got at time of registration.

When you change the type and press submit, it will log you out from journey CRM and redirect to login page. You will ask to login again with new authentication mode.

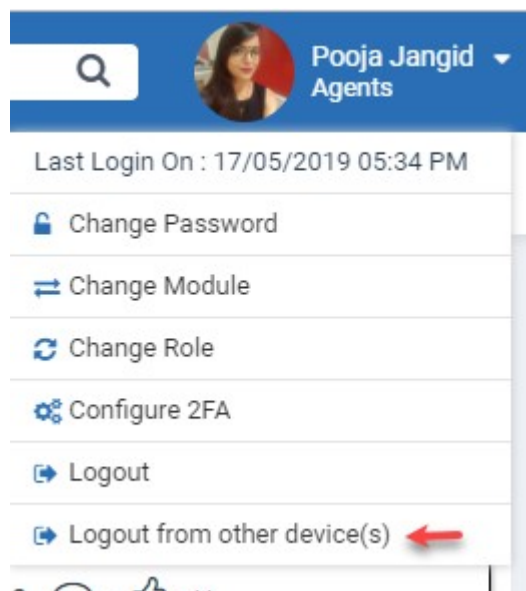
If you cancel, then it will take you to previous page.



The screenshot shows a modal window titled "TWO FACTOR AUTHENTICATION". Below the title is a note: "Note: If you want to enable two factor authentication then changes will reflect after relogin your account." There is a dropdown menu labeled "Choose Authentication Type" with "ONETOUCH" selected. Below this is a link: "Need help to know more about the authentication type? Download the help file from here" followed by a PDF icon. At the bottom are two buttons: a large orange "SUBMIT" button and a smaller "Cancel" button.

### Forgot to Logout from other devices?

No worries, we have added a option where you can logout from other devices when you forgot to logout. You will find a link 'Logout from other devises(a) 'just below to logout link. When you click on this then your active session from other devices will be ended but this will not log you out from current device.



## Can managers turn on or off 2FA authentication for any user in case of any problem with the 2FA authentication?

Yes, they can, managers will be able to manage enable/disable 2FA for users.

They will have an option in user account to manage 2FA feature and they can turn this off if require for any situation. Like mobile lost or stolen.

We would recommend installing app on both mobile and desktop so user will be able to authenticate from either of them.

Below is screenshot for user account. This will be enabled for all users after the registered with 2FA.

The screenshot shows the 'Add User' form in the JOURNEY CRM application. The form is structured as follows:

- Header:** JOURNEY CRM logo, navigation tabs (Console, Dashboard, Create Case, Events, Enquiry Search, Reports, Users, Other), a search bar, and a user profile (Kundan Singh Management).
- Left Sidebar:** A vertical menu with call management controls: 'ACTIVE' status, 'DIAL' (green), 'HANG UP' (red), 'NEXT TASK' (yellow), 'TRANSFER', 'PLACE ON HOLD', 'Time to Accept' (120), 'ACCEPT', 'IGNORE', 'CORRECT NO' (green), 'INCORRECT NO' (red), 'CALL OUTCOME:', 'ARRANGE CALL BACK:', 'SEND EMAIL:', 'SEND SMS:', 'LEAVE VOICEMAIL', and 'SAVE & COMPLETE'.
- Main Form:**
  - Personal Information:** Fields for First Name, Last Name, Telephone, Flexible Working, Admin, and a checkbox for 'Enable Two Factor Authentication' (highlighted with a green box).
  - Login Details:** Fields for E-Mail Address, Password, Confirm Password, and TD User Code.
  - Brands:** A section with checkboxes for 'Ocean Florida - Ocean California' and 'Winged Boots'.
  - Other Details:** A section for 'User Signature' with a toolbar for editing and saving.

**\*\* If your query is not sorted in this help file then please raise a IT ticket or see your respective manager or see a IT person.**