Nexia Edwards Marshall

Getting Started with Collaborate

You will receive an email similar to the below, advising that there is a document to view in your Collaborate Portal.

Hello George

Nexia Edwards Marshall is sharing the following document with you:

- DAF - Registration TEST Signing FYI-1002534565.pdf (SIGNED) (FYI-1002554216).pdf

If you require assistance to view or sign this document, please contact me.
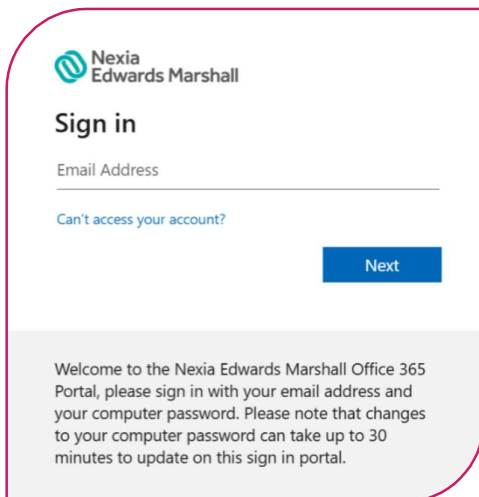
Please note that security has recently been increased on our Collaborate site, requiring two-factor authentication to be set up for all users. Please follow the prompts when logging in to Collaborate to set up 2FA via text message (recommended) or the Microsoft Authenticator app.

If you do not have a microsoft account, please create one here to receive and sign documents in future: https://signup.live.com/?lic=1
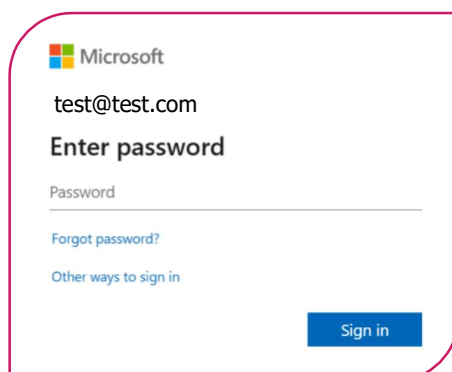
Kind regards,

You will go to the Collaborate Portal login page and add the email address you have registered with Nexia Edwards Marshall, click 'Next'.

Nexia Edwards Marshall

Sign in

Email Address

Can't access your account?

Next

Welcome to the Nexia Edwards Marshall Office 365 Portal, please sign in with your email address and your computer password. Please note that changes to your computer password can take up to 30 minutes to update on this sign in portal.

You will then be taken to the Microsoft login page as shown below.

Microsoft

test@test.com

Enter password

Password

Forgot password?

Other ways to sign in

Sign in

![Nexia Edwards Marshall logo]

If you have a Microsoft account, please enter the password associated with that account that is connected to the email address you entered to login. Click 'Sign In'.

You should be taken to the following to confirm if you want to stay signed in, please make selections accordingly.

You will then be taken to the Permissions requested page, please click 'Accept'.

There will be a 'More information required' page, please click 'use a different account' or click 'Next', as shown below.

You will now need to download the Microsoft Authenticator app onto your mobile phone via the App store for your relevant device.

You will need to click on Download now if you don't have it or click Next if you already have the app. If you wish to use an alternative app please click on I want to use a different authenticator app. You can use a different method by clicking on the I want to set up a different method.
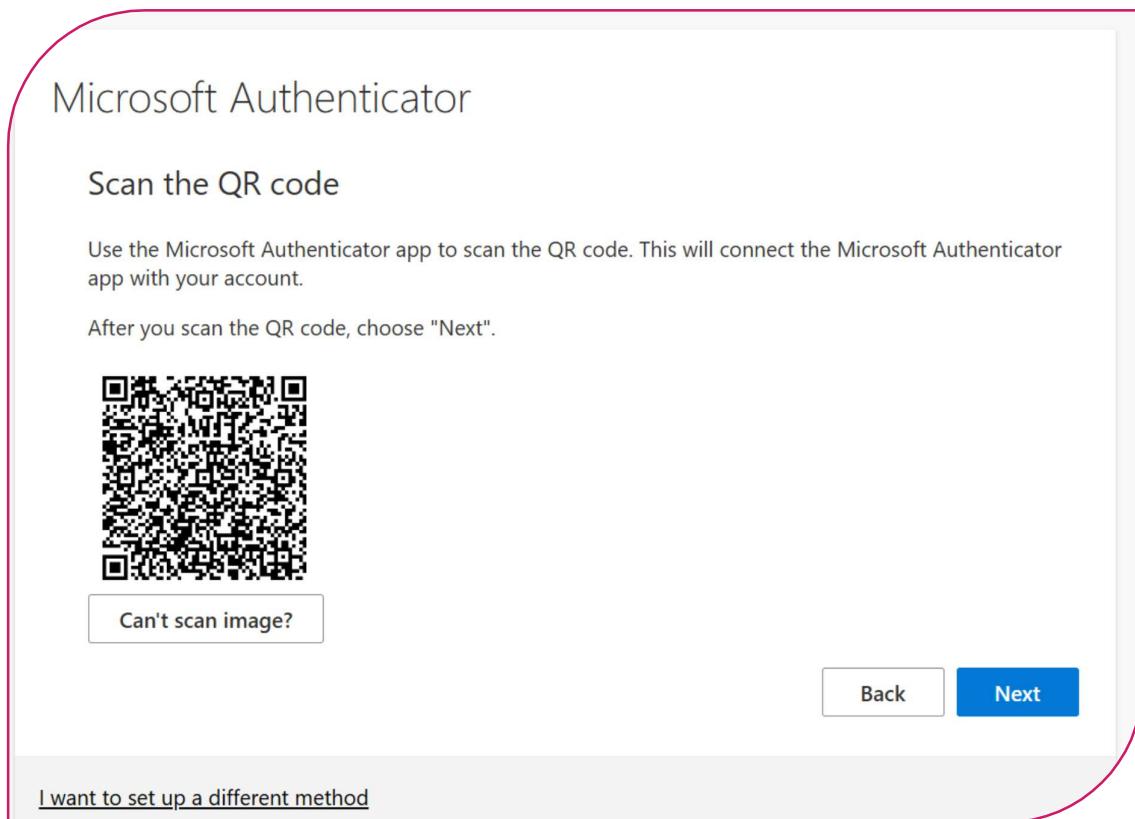

Once you have downloaded the app from the relevant App Store or already have the app please click 'Next'.

You will then need to Set up your account.
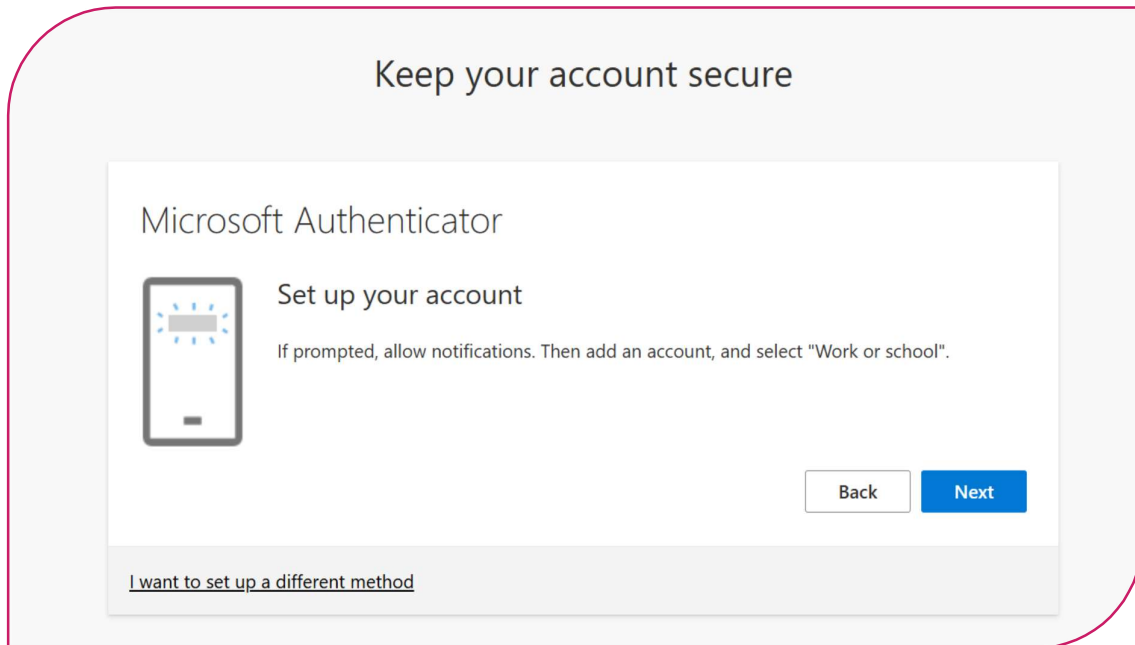
Click Next or I want to set up a different method.

Once you click 'Next' you will get the Microsoft Authenticator 'Scan QR Code', as shown below.

Open the Microsoft Authenticator App and click the plus sign at the top of your device screen. Select the 'Personal' / 'Work' or 'School' account.
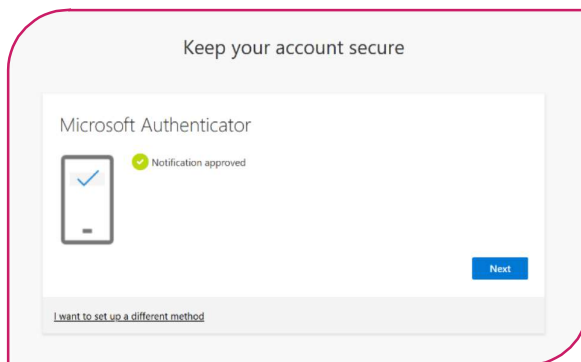
Select Scan a QR Code.

Then scan the QR code on your PC with your mobile device.
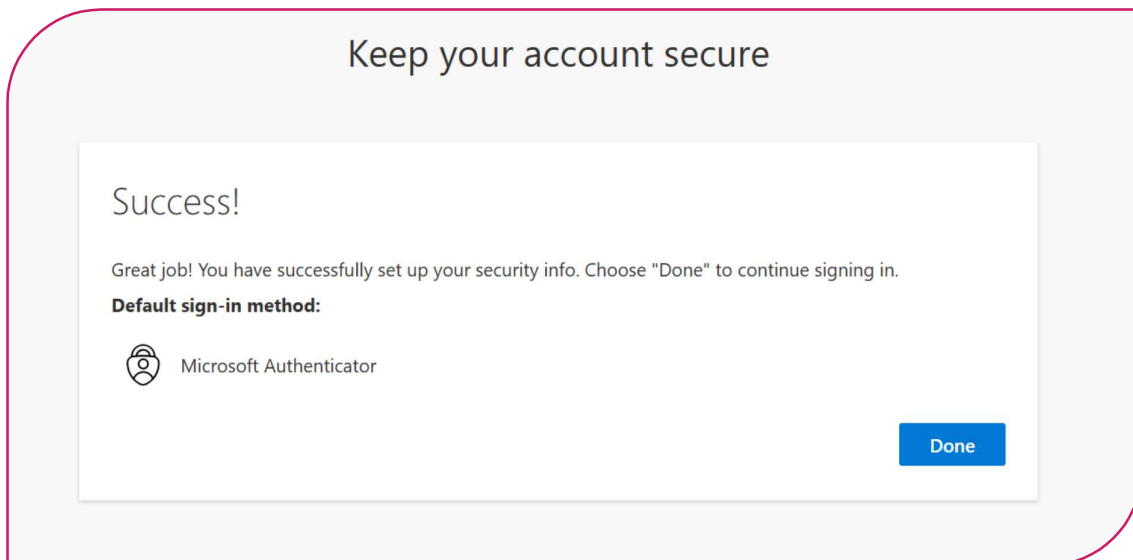
This will then add the account Nexia Edwards Marshall

Click 'Next' on your PC.

You will be asked to place a code on your mobile device from your computer screen and enter this if successful you should receive the below message then click 'Next'.

Keep your account secure

Microsoft Authenticator

✓ Notification approved

Next

I want to set up a different method

You should then receive the following message:

Keep your account secure

Success!

Great job! You have successfully set up your security info. Choose "Done" to continue signing in.

Default sign-in method:

Microsoft Authenticator

Done

Click 'Done'.

You will then need to Approve sign in request. Open your Authenticator app and enter the number shown on your PC.
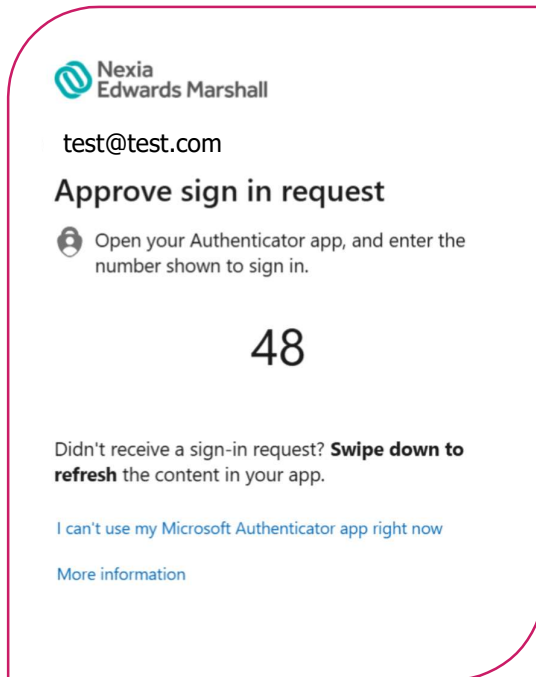
You will only need to do this setup once and then you should be able to access the Collaborate portal by using the Authenticator App for your 2FA (Two Factor Authentication).

If you need further assistance, please reach out to your client services coordinator.