



EQUIFAX



**Quick Start
Migration Guide**

Equifax Online Portal





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● Overview

Coming soon, **a new online web platform** will launch for users of the legacy portal. This is part of an overarching cloud transformation program designed to maximize your value.

For a seamless transition, please set up your new credentials now. Continue to use the legacy portal to submit inquiries and report tradelines prior to this launch.

Upon launch of the new platform, your access to the legacy portal will be disabled and you'll sign in to the new application with your new credentials. We'll provide additional guidance prior to this cutover to assist with the transition.

Use this guide to set up your new credentials in the new Equifax portal.





● Prepare for the new portal

Overall, the new portal will closely resemble the legacy platform. However, **it will be available at a new web address (i.e., URL)** requiring new credentials to access it. Please bookmark it for future reference.



A new username and password will be required to sign in to the new site. Your username will be your email address and each username must be associated with a unique email address. Your password will be established during your initial login.

Primary Contacts will review, add, and remove company users to ensure the right users are set up in the new site. Once your migration meeting has been scheduled, we'll provide you with a list of currently enabled users.

Review this list for any users who are no longer with the company or no longer need access to screen applicants online. Please remove these users from the list provided.

If there are new users to be added, please add relevant information to the required fields in the spreadsheet template that we'll provide. (The newly added users on the returned list will not be enabled for screening until the go-live date.)

Once all users have been removed and added, please send the updates to cust.serv@equifax.com and we'll prepare the user credentials for the scheduled migration meeting. Please also populate your company name in the subject line upon submission.

For security purposes, advanced user authentication will be required by all users when logging in to the new Equifax Online Portal. This is referred to as Multi-Factor Authentication (MFA) and can be handled using email, SMS messaging, or Google Authenticator. Additionally, individual user accounts are required per user since sharing of user accounts is not compliant with our security requirements.

MFA can be completed using **the user's company email address, through SMS messaging** sent to a wireless phone, or via **Google Authenticator.**

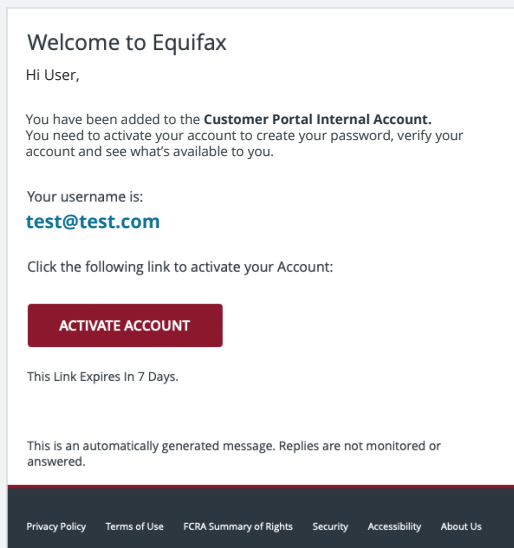
If users are not able to use personal wireless phones at work, then **MFA should be completed using the user's email address.**

● Activate your credentials in the new portal

The first step is to **activate your credentials** in the new portal.

To get started, watch for the welcome email (from cust.serv@equifax.com) that will be sent to each user. This email contains the activation link and enables each user to create a new password. Below is an example of this email. Users should select Activate Account within the first seven days of receiving it.

If the activation link has expired, reply to cust.serv@equifax.com to generate a new email containing a new link to activate your account.



After selecting Activate Account, **users are prompted to create a new password for the new portal** containing the following attributes:

- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character
- 8 characters minimum in length

Create Your Password
Create a new, strong password that you haven't used before.

New Password*

.....

- ✓ 1 uppercase letter
- ✓ 0 special character
- ✓ 1 lowercase letter
- ✗ 8 characters minimum
- ✓ 1 number
- ✗ Matches new password

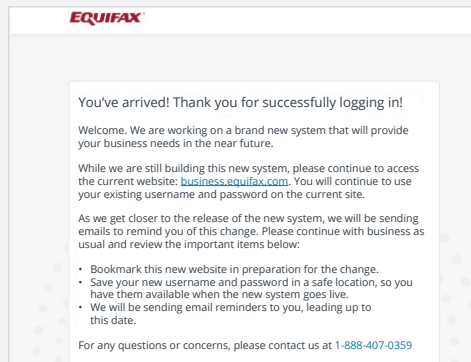
Confirm Password*

.....

SAVE AND SIGN IN

After successfully creating your new password, you'll receive a **congratulatory welcome page indicating a successful login.**

Bookmark the new web URL for the new portal (business.equifax.com) and save your new username and password to be ready for the launch of the new site.





● Set up your Multi-Factor Authentication

The final step is to establish **Multi-Factor Authentication (MFA)** which is required to comply with the advanced security protocols of the new portal. This becomes effective with your second login to the new application.

- ⋮ **Log out** after receiving the Welcome page.
- ⋮ **Log in** with your new username and password.
- ⋮ **Complete the MFA process** by selecting your MFA method and following the prompts on the subsequent screens.

Sign in

Please enter your credentials to sign in.

Username

[Forgot your password?](#)

[Forgot username?](#)

Please enter your credentials to sign in.

Username*

Password*

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SMS (text) authentication

⋮ Choose **SMS Authentication** to set up your MFA.

Set Up Multi-factor Authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your account

- SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Send Code](#)
- Email Authentication**
Enter a verification code sent to your email.
[Send Code](#)

⋮ Enter your **wireless phone number** (and country code).

⋮ Select **SEND CODE**.

Set Up SMS Authentication

Receive a code via SMS to authenticate

Country

United States

Phone number

+1

SEND CODE

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SMS (text) authentication, continued

- Enter the one time verification code from your phone in the **Verification Code** field. Click the **VERIFY** button.

The screenshot shows a web form titled "Set Up SMS Authentication". Below the title, it says "Receive a code via SMS to authenticate". There are three input fields: "Country" (with a dropdown menu showing "Costa Rica"), "Phone number" (with a pre-filled value "+506 101-555-1212"), and "Verification Code" (empty). A "Code Sent" button is located below the phone number field. At the bottom of the form is a red "VERIFY" button.

- Once you've successfully authenticated using the SMS code, **you'll see a green checkmark next to SMS Authentication.**

- Click the FINISH button** to complete the setup of your MFA Authentication and you're good to go.

The screenshot shows a web form titled "Set Up Multi-factor Authentication". Below the title, it says "You can configure any additional optional factor or click **Finish**." Under the heading "Enrolled factors", there is a single entry: "SMS Authentication" with a green checkmark to its right. At the bottom of the form is a red "FINISH" button.

- In future logins, enter your **Username, Password, and MFA Authentication Code** using the SMS option.



Email authentication

⋮ Choose **Email Authentication** to set up your MFA.

Set Up Multi-factor Authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your account



SMS Authentication

Enter a single-use code sent to your mobile phone.

Send Code



Email Authentication

Enter a verification code sent to your email.

Send Code

⋮ **Enter the email address** that corresponds to your username.

⋮ Select **SEND CODE**.

⋮ **Watch for an email** (from cust.serv@equifax.com) with the subject 'Action Required: Confirm your email address.' This contains a verification code which will be used to validate your email address.

Set Up Email Authentication

A verification code was sent to n...r@equifax.com. Check your email for the code and enter it to proceed.

Verification code

VERIFY



Email authentication, continued

- Enter the one time verification code from the email in the **Verification Code** field. Click the **VERIFY** button.

Set Up Email Authentication

A verification code was sent to b...2@equifax.com. Check your email for the code and enter it to proceed.

Verification code

VERIFY





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- Once you've successfully authenticated using the code from your email, **you'll see a green checkmark next to Email Authentication.**
- Click the FINISH button** to complete the setup of your MFA Authentication and you're good to go.

Set Up Multi-factor Authentication

You can configure any additional optional factor or click **Finish**.

Enrolled factors

	SMS Authentication	
	Email Authentication	

FINISH

- In future logins, enter your **Username, Password, and MFA Authentication Code** using the email option.



Google authentication

⋮ Choose **Google Authentication** to set up your MFA.

Set Up Multi-factor Authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your account



Google Authenticator
Enter single-use code from the mobile app.

Send Code

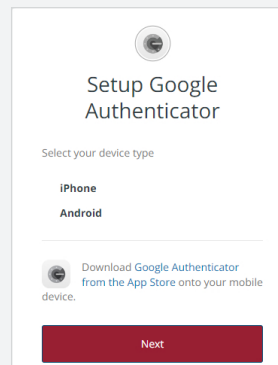


SMS Authentication
Enter a single-use code sent to your mobile phone.

Send Code

⋮ Select your **device type**.

⋮ Select **NEXT**.



⋮ Launch the Google Authenticator mobile application, tap the "+" icon, and scan the provided barcode.



Google authentication, continued

- Watch for a verification code displayed on the Google Authenticator mobile application. Enter the one-time verification code from the mobile application in the **Verification Code** field.

Setup Google Authenticator

Enter code displayed from the application

Verification Code

Verify

- Once you've successfully authenticated using the code from the Google Authenticator mobile application, **you'll see a green checkmark next to Google Authenticator.**
- Click the FINISH button** to complete the setup of your MFA Authentication and you're good to go.

Set Up Multi-factor Authentication

You can configure any additional optional factor or click **Finish**.

Enrolled factors

Google Authenticator	✓
SMS Authentication	✓
Email Authentication	✓

FINISH

- In future logins, enter your **Username, Password, and MFA Authentication Code** using the Google Authenticator option.

● Congratulations. You're ready for the new portal.

After you complete this short authentication process, you're ready to sign in and use the new portal.

Continue using the existing online portal until we announce the availability of the new platform.

Questions?

We're available to help.

Just contact us at [888-407-0359](tel:888-407-0359) or by email at cust.serv@equifax.com for assistance.

Thanks for your partnership.

