Multi Factor Authentication (MFA) for Users

04/25/2025 10:00 am MDT

Enable

To enable Multi-Factor Authentication (MFA) your security enabled user should navigate to the security settings screen. Note that only the users with security settings will see this interface.

Admin > Security Settings.

Hi, Brad Bowyer	ć.		Edit your profile
COP Users	Lists	Admin	
Manage Users	Companies	General	Customization
View Permissions	Contacts	Security Settings	Doc Code/Card Fields
Manage Sub-Supplier Accounts	Relationships	Default Prices	Equipment Fields
	Jobs	Stages	Field Templates
	Library Folders	Levels	Package Layout

Settings

1. Define which roles require authentication. Best practice is to protect high access roles, such as admin and full users. Other option include reviewer and view roles, as well as contact web access (if contact access has been granted to the customer portal) and sub-supplier accounts.

2. Define how often your users should authenticate. As long as they are accessing the system from the same IP address, the authentication will be maintained.

90	
Require customer to authenticate when acce	toing submittals 🛛 *
No	
Require authentication every X days *	
20	K

Override

If a user is trying to access the system, and is unable to receive the authentication email, a user with security permission can override the setting. This must be manually set and unset. This option is ONLY available to users with the security permission.



Email templates

The user email (with the authentication code) is a system specific email, and cannot be edited. The customer facing template can be changed.