

CONSOLIDATED LOGIN

NEW FEATURE FOR BIRKMANDIRECT



WHAT IS CONSOLIDATED LOGIN?



- **Consolidated Login is the ability to use one username and password to access all of your BDIRECT accounts.**
- This includes consolidating accounts that are varied in levels of access AND different companies:
 - Insights, Basics, Signature, etc.
 - A personal account and a corporate account.
 - Both access level and different companies.
- This is not an automated process. Customers will have to elect to consolidate and will have to go through several steps to consolidate.
- Consolidated Login will NOT consolidate access to the Birkman Learning System (BLS).

CONSOLIDATED LOGIN ANNOUNCEMENT SCREEN (STEP 1)



currently logged in will be the first account to be consolidated. The email address you enter will become your

Introducing Consolidated Logins!

Who Should Consolidate?

If you currently have multiple BirkmanDirect login credentials – because you have various levels of report access, or you have both a personal account and a business account with us – you now have the option of consolidating them. This new feature allows you to **use a single username and password** to access every BirkmanDirect account that you currently login to separately. After you have consolidated your accounts, you will use your new consolidated credentials to login to BirkmanDirect. Your various accounts will be displayed on-screen. Select the desired account and continue using BirkmanDirect as usual. You can easily switch accounts by navigating back to the account display screen and selecting a different account.

If you have multiple logins AND **you are not currently sharing your username and password** with others and want to consolidate, click the **Get Started** button below.

Who Should Not Consolidate?

1. If you only have one BirkmanDirect account there is no need for you to consolidate.
2. If you have multiple login credentials but share usernames for any of them with other people, contact support@birkman.com so we can set up unique login credentials for each user. Then consolidation can be accomplished. Consolidation is unique to each person accessing the BirkmanDirect site.

Feel free to contact us at support@birkman.com at any point in the process if you have questions.

Do not display this message on next login.

[Get Started](#) [Maybe Later](#)

- Beginning November 7th, upon logging in on a BirkmanDirect account you will see this screen appear.
- It's important to read this screen carefully to determine if consolidation is "right" for you.
- If you do not want to have this screen display each time you log in, simply click the Do Not Display box.
- Clicking the **Get Started** button here sends you to a new screen shown on the next slide.

CONSOLIDATED LOGIN SET UP SCREEN (STEP 2)



Consolidated Login Setup

Please provide the information requested below to start consolidating your accounts. The account to which you are currently logged in will be the first account to be consolidated. **The email address you enter will become your consolidated login username.** Please make sure the email address is entered correctly and that it is your preferred contact email account for all consolidations. Once one account is consolidated, please use the consolidated account to request additional accounts to be consolidated.

First Name

Last Name

Email Address

Confirm Email Address

Password

Confirm Password

Account Username [WHAT'S THIS?](#)

Account Password [WHAT'S THIS?](#)

Submit Request

Cancel

Once you select to Get Started this screen will appear.

- It's important to know that the email address you add here will become your permanent username for the consolidated account. You are also asked to create a new password for this consolidated account.
- **NOTE:** Your new password will need to contain 8 characters, including 1 uppercase letter, 1 lowercase letter, 1 number, and one special character (~!@#\$\$%^*).
- The Account Username will be auto-filled with the account username you used when logging in when you started. You should add the password that relates to that account in the Account Password field.
- Click **Submit Request**.

CONSOLIDATED LOGIN CONFIRMATION (STEP 2 - CONFIRMATION)



are currently logged in will be the first account to be consolidated. The email address you enter will

Consolidated Login Confirmation

An email has been sent to cbuckner@birkman.com requesting permission to consolidate the requested account. If this is you, follow the instructions provided in the email to continue the consolidation process for this account. If this email address is not yours, this indicates that there has been sharing of login credentials and you should contact support@birkman.com for further instructions. If this email address is yours but is outdated or incorrect, you will also need to contact support for assistance updating your email address in our system.

[Continue to BirkmanDirect](#)

Password Confirm Password

[Dev] Your request to consolidate your BirkmanDirect account has been received

Inbox x

support@birkman.com 7:02 AM (3 minutes ago) ☆

to me

Dear John Public,

This is an automated email from BirkmanDirect. A request to consolidate the account below has been sent to the manager of this account:

- Email: xxxxxxxxxxxxx@gmail.com
- Username: jpublic

Once the manager approves your request, you will receive an email with further instructions.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

- Once you click submit request, three things happen:
- 1) You will see a screen confirming a request has been sent by email.
 - 2) An email is sent to the address you just added confirming the request.
 - 3) An email is sent to the manager associated with that account/login.
- Most times these two emails will go to the same email address, it is only when a different email address is associated with the account for which you have logged in on that the messages will be sent to different addresses.
 - Varying email addresses can occur for several reasons:
 - You have used multiple emails in doing business with Birkman.
 - We do not have current contact information for you.
 - You are sharing login credentials, possibly without knowing it.
 - You may require Birkman support in updating the records while others may be fine for you as both email addresses are current email addresses for you.
 - Contact support@Birkman.com if you have questions, or if you need to update your records.

CONSOLIDATED LOGIN APPROVAL (STEP 3)



Tue 10/17/2017 7:02 AM

 support@birkman.com
[Dev] A request to consolidate your BirkmanDirect account has been made

To  Carol Buckner

Dear cbuckner@birkman.com,

This is an automated email from BirkmanDirect. A request has been made to consolidate the following account with a Birkman Consolidated Login.

- Account #: 5127000
- Account Name: Public Consolidation
- Account Username: jpublic

Consolidated Logins allow users to use a single username and password to access every BirkmanDirect account that they currently login to separately. Once consolidated, users can easily switch accounts by navigating back to their account display screen and selecting a different account.

Please click on the link below to allow or deny John Public (cbuckner@birkman.com) to consolidate the account:

<https://uatdirect.birkman.com/nologin/authorize.php?authKey=A6C3880B-3383-E711-80CA-000C299591BD>

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

Once you see the confirmation screen you can continue to BDirect, or you can immediately go to your email account to begin the consolidation process.

- Account information will be included in the request to consolidate email. This email has gone to the Birkman consultant who is linked to the original username and password for this account. If that is you, you should **click on the link** included in the email to proceed.
- If, however, you do not receive this email, it is likely a different email is associated with this account. Please check other email addresses you have to make sure the email was not sent to another account.
- If you still don't receive the request email it is likely you are sharing login credentials with someone else; or, Birkman has outdated information for you.
- Please contact our support staff for assistance. You can call 713-623-2760 or email us at support@birkman.com.

CONSOLIDATED LOGIN APPROVAL (STEP 3 - CONFIRMATION)



Tue 10/17/2017 7:18 AM

 SB
support@birkman.com

[Dev] Thank you for confirming consolidation of your BirkmanDirect account

To  Carol Buckner

Dear cbuckner@birkman.com,

This is an automated email from BirkmanDirect. This email is to provide proof of record that the following account has been approved for consolidation into a single login for John Public:

- Account #: 5127000
- Account Name: Public Consolidation

Please retain this email for your records.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

Another email is generated and sent as a record of the confirmation. Keep this email as a record of your confirmation.

CONSOLIDATED LOGIN APPROVAL (STEP 4)



Consolidate your BirkmanDirect Account

A request has been made to consolidate the following account with a Birkman Consolidated Login.

Account #: 5127000

Account Name: Public Consolidation

Account Username: jpublic

Please choose from the following options:

Confirm

Deny

Once you click on the link in the email, the following screen will appear. Click **Confirm**, and a pop-up window will briefly appear thanking you for confirming the request.

- You are then redirected to the BDirect login screen.
- **LOG IN USING THE NEWLY CREATED USERNAME (email address) AND PASSWORD**

NOTE: In the case that your request is denied, please refer to Slide 18.

NOTE: At this point, **the first account has been consolidated.**

The login screen displays the Birkman logo at the top left. Below it are two input fields: "Username" and "Password". A "Forgot Your Password?" link is positioned to the right of the password field. A brown "LOGIN" button is located at the bottom right of the form area. At the bottom left, the text "Google Chrome 61.0.3163.100 on Windows" is visible, and a small Birkman logo icon is at the bottom right.

Username

Password

[Forgot Your Password?](#)

LOGIN

Google Chrome 61.0.3163.100 on Windows

CONSOLIDATED LOGIN (STEP 5)



BIRKMAN
Hello, John Public (5127000 - Public Consolidation)

Home | Help | Logout

NAVIGATION

- Questionnaire
- Reports
- Birkman 360°

AUTHORIZE QUESTIONNAIRES

- RESEND QUESTIONNAIRES
- MANAGE REPORT SETS
- BIRKMAN STORE
- CONSULTANT DIRECTORY

QUESTIONNAIRE STATUS

QUESTIONNAIRES SCORED

Date Completed	Company	Birkman ID	Respondent
2002-02-20	6481027	BX6396	JOHN Q. PUBLIC

QUESTIONNAIRES AUTHORIZED

Date Created	Company	Email	Options
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review resend revoke complete

SUPPORT

CUSTOMER SERVICE
8AM TO 5PM CST, MON-FRI

OUR TIME IS: TUE, 07:24:34 (CDT, -0500)

The Completely NEW **BIRKMAN RESOURCE CENTER**
VIEW NOW

MY ACCOUNT

- VIEW/PAY INVOICES
- INVOICING OPTIONS
- CONSOLIDATED LOGINS**
- ACCOUNT INFORMATION
- DATABASE INFORMATION
- BDIRECT PREFERENCES
- EZ LINKS PREFERENCES
- TRAINING HISTORY / REGISTRATIONS

On the home screen of BDirect there is a new option under “My Account” which is on the right side of the screen. That new option is “Consolidated Logins”.

- Even if you have chosen not to see the initial explanation page upon logging in, this option remains so you can elect to consolidate at any time.
- If you click the **Consolidated Login** option you will be taken to a new screen that shows any consolidated accounts and/or accounts that are pending consolidation.

CONSOLIDATED LOGIN (STEP 6)



BIRKMAN
Hello, John Public (5127000 - Public Consolidation)

NAVIGATION

Questionnaire Reports

Birkman 360

AUTHORIZE QUESTIONNAIRES
RESEND QUESTIONNAIRES
MANAGE REPORT SETS
BIRKMAN STORE
CONSULTANT DIRECTORY

CONSOLIDATED LOGINS [Add Login](#) [Modify Login](#)

Public Consolidation	5127000
Billing ID#: 023324	
Module: Signature Suite	
Status: approved	
Logged in	
Remove Account	

Notice that at this point only one account is showing – only one account has been consolidated, or is in the process of being consolidated.

- In this example, the status shows approved since we have already confirmed approval.
- You will also notice that the status shows as being logged in on this account currently (and is greyed out) and the Remove Account option is greyed out – you cannot remove an account if you are currently logged in on that account.

If interested in adding additional accounts, continue with the steps presented in the following slides.

- To initiate the process for your other accounts you should click the **“Add Login”** button from the Consolidated Logins screen. Otherwise, the consolidation process is complete.

CONSOLIDATED LOGIN (STEP 7)



 Home | Help | Logout

Hello, John Public (5127000 - Public Consolidation)

NAVIGATION **ADD AN ACCOUNT TO CONSOLIDATE**

 **Questionnaire**  **Reports**

 **Birkman 360°**

AUTHORIZE QUESTIONNAIRES
RESEND QUESTIONNAIRES
MANAGE REPORT SETS
BIRKMAN STORE
CONSULTANT DIRECTORY

Please enter your current username and password for an account you want to consolidate and click Submit Request. A confirmation email will be sent to you confirming your request.

A separate email will be sent to the email address that Birkman has on file for the requested account (this email may go to you, as well) containing instructions for allowing the consolidation to occur. Once permission has been granted you will receive another email letting you know your request has been approved and the account will be consolidated. The next time you log in using your new "consolidated login credentials" you will see that account on your account display screen.

You will need to take this step for each account/login you would like to consolidate.

Once you click “Add Login,” you are then directed to a screen that asks for the username and password for an account you would like to consolidate. **Enter the username and password for the new account.**

- For example, in the screen shown previously you will notice that I have consolidated a Signature Suite account (full access) with an account number of 5127000.
- Now I am requesting to have my Insights or BOD account consolidated by adding the username and password associated with that BOD/Insights account.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 8)



BIRKMAN
Hello, John Public (5127000 - Public Consolidation)

NAVIGATION

CONSOLIDATED LOGINS Add Login | Modify Login

Public Consolidation	5127000	Public Consolidation	5127B0D
Billing ID#: 023324		Billing ID#: 023324	
Module: Signature Suite		Module: Insights	
Status: approved		Status: pending Resend Request	
Logged in		Login	
Remove Account		Cancel Request	

AUTHORIZE QUESTIONNAIRES
RESEND QUESTIONNAIRES
MANAGE REPORT SETS
BIRKMAN STORE
CONSULTANT DIRECTORY

Once you have entered the username and password click **“Submit Request”**. A quick confirmation statement will appear at the top of the screen, and you will be taken back to the Consolidated Logins screen.

- A new account has been added on the Consolidated Logins screen with the status as listed as Pending.
- You will also see an option to resend the confirmation request if needed.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 8 - CONFIRMATION)



support@birkman.com 7:40 AM (1 hour ago) ☆ ↶ ▾

to me ▾

Dear John Public,

This is an automated email from BirkmanDirect. A request to consolidate the account below has been sent to the manager of this account:

- Email: xxxxxxx@birkman.com
- Username: jpublicbod

...

Once the manager approves your request, you will receive an email with further instructions.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

Again, two emails will be sent, one to you, the requestor, which will go to the email address you used for consolidation.

- This is a confirmation of the request.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 9)



 Tue 10/17/2017 7:40 AM
support@birkman.com
[Dev] A request to consolidate your BirkmanDirect account has been made

To  Carol Buckner

Dear cbuckner@birkman.com,

This is an automated email from BirkmanDirect. A request has been made to consolidate the following account with a Birkman Consolidated Login.

- Account #: 5127BOD
- Account Name: Public Consolidation
- Account Username: jpublicbod

Consolidated Logins allow users to use a single username and password to access every BirkmanDirect account that they currently login to separately. Once consolidated, users can easily switch accounts by navigating back to their account display screen and selecting a different account.

Please click on the link below to allow or deny the following user to consolidate the account:

John Public - carolannbuckner@gmail.com

<https://uatdirect.birkman.com/nologin/authorize.php?authKey=945E024C-38B3-E711-80CA-000C299591BD>

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

As for the first consolidated account, the second email goes to the consultant listed in Birkman records as being associated with that account.

- **Click the link** included in this email to approve the consolidation request.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 10)



Consolidate your BirkmanDirect Account

A request has been made to consolidate the following account with a Birkman Consolidated Login.

Account #: 5127BOD

Account Name: Public Consolidation

Account Username: jpublicbod

Please choose from the following options:

Confirm

Deny

Once you have accessed the link a new screen will appear asking you to **approve** or **deny** the request.

- Note: This is the same process as for the first account to be consolidated; but, it was initiated through the Consolidation Login screen rather than logging in on the second account and initiating from there.
- **IMPORTANT:** Once you have consolidated one account, **ONLY** consolidate additional accounts through this method. **DO NOT** login directly to another unconsolidated account and start the process from there.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 10 - CONFIRMATION)



 Tue 10/17/2017 9:42 AM
support@birkman.com
[Dev] Thank you for confirming consolidation of your BirkmanDirect account

To  Carol Buckner

Dear cbuckner@birkman.com,

This is an automated email from BirkmanDirect. This email is to provide proof of record that the following account has been approved for consolidation into a single login for John Public:

- Account #: 5127BOD
- Account Name: Public Consolidation

Please retain this email for your records.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

Again, after the consolidation request has been confirmed by clicking the link and approving the request, an email is sent to the email on file for that account confirming the consolidation.

CONSOLIDATED LOGIN SECOND ACCOUNT (STEP 11)



CONSOLIDATED LOGINS			
Public Consolidation	5127000	Public Consolidation	5127BOD
Billing ID#: 023324 Module: Signature Suite Status: approved		Billing ID#: 023324 Module: Insights Status: approved	
Login		Login	
Remove Account		Remove Account	

Now, when you login on BDirect again using your consolidated login credentials (email address and new password), you will be taken to the Consolidated Logins screen where you can **choose which account** to actually access.

- **NOTE:** If you are wanting to begin the process again for another account you will need to click login on one of the accounts and then proceed using the steps above.

CONSOLIDATED LOGIN DECLINED REQUEST

(DECLINED REQUEST)



Consolidate your BirkmanDirect Account

A request has been made to consolidate the following account with a Birkman Consolidated Login.

Account #: 5127BBS
Account Name: Public Consolidation
Account Username: jpublicbasics

Please choose from the following options:

Confirm

Deny

If, for some reason, a manager does not confirm the request and clicks DENY, two emails are sent. One to the requestor and one to the manager on the account (which may be the same person/email address).

- Shown here is the email is a record of the denial which is sent to the manager of the account.

Thu 11/2/2017 2:38 PM

 support@birkman.com

[uatdirect] [Dev] Thank you for denying consolidation of your BirkmanDirect account

 Carol Buckner

Dear cbuckner@birkman.com,

This is an automated email from BirkmanDirect. This email is to provide proof of record that the following account has been denied for consolidation into a single login for John Public:

- Account #: 5127BBS
- Account Name: Public Consolidation

Please retain this email for your records.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

CONSOLIDATED LOGIN DECLINED REQUEST (DECLINED REQUEST – CONT.)



From: <support@birkman.com>
Date: November 2, 2017 at 2:38:16 PM CDT
To: <bmartin@birkman.com>
Subject: [uatdirect] [Dev] Your BirkmanDirect account consolidation request has been denied

Dear Dilek Er,

This is an automated email from BirkmanDirect. Your request to consolidate the following account has been denied:

- Account #: 5127BBS
- Account Name: Public Consolidation

If you feel this denial has been in error, please contact Birkman Support (support@birkman.com).

Please retain this email for your records.

Thank you,

BirkmanDirect Automated Email System

This is an automatically generated email sent to you by Birkman International Client Relations to provide important information about your account and/or online products and services for which you are registered. Replies to this email will not be received by Birkman. Birkman will never ask for sensitive information through email. If you have any concerns that this or any email is a phishing email, please open a new window in your web browser and type in the URL <https://direct.birkman.com> and log in to your online account for more information, or contact Birkman International directly.

Shown here is a copy of the second email that informs the requestor that their request was denied.

CONSOLIDATED LOGIN



Important Points to Remember

- The databases of the accounts are NOT co-mingled. You will still need to choose which account you want to work in once you have logged in using the consolidated login credentials.
- Invoices will remain separate. To make an online payment you will need to access each account to view and pay invoices.
- This feature does NOT impact the transfer/copy process of moving reports between accounts.
- The Birkman Learning System (BLS) must still be accessed by going to learning.Birkman.com.

This process can be continued for all of your BirkmanDirect accounts.

If you need assistance at any point in the process, contact support@birkman.com or call 713-623-2760.

QUESTIONS?

CONTACT SUPPORT AT SUPPORT@BIRKMAN.COM OR 713-623-2760

