



How to set up your access: Secure file exchange with Commerzbank for external users

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Detailed Setup process for PC / Laptop

Chapter 1

Detailed Setup process (PC/Laptop)



The process and screenshots in this guide were taken on a Microsoft Windows Laptop device, using a Gmail account with a Google Chrome browser, and the Microsoft Authenticator App. Some parts may look a little bit different, depending on your device, browser, email provider or Authenticator App. Once you are setup, additional logins have less steps.

Preparation

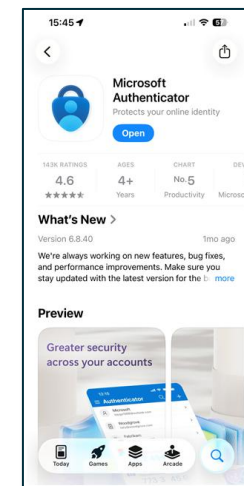
In order to access documents or information at Commerzbank, we need to be able to verify your access securely. As part of the setup process, you will need to use an authenticator app on a smart device. If you do not already have one installed, you will need to download it from your app store.

Commerzbank recommends the Microsoft Authenticator app, as it offers features such as push notifications. However, you can also use other existing apps like Google Authenticator.

Please ensure that you have an authenticator app installed before starting the setup process. This will make the process easier.

Downloading Microsoft Authenticator app

- Download the **latest** version of the **Microsoft Authenticator app** for your operating system by scanning the QR code or by searching for “**Microsoft Authenticator**” in the Play Store or App Store.



Detailed Setup process (PC/Laptop)



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01

Invitation Mailing

- Check your email inbox for a message with the subject: **“Commerzbank invites you to share information within their organization”**.
- Click **1** **“Accept invitation”** at the bottom of the mail to start the setup. A window will open and will ask you to get a code to sign in, **Follow Steps 2-4**.

Commerzbank lädt Sie ein, Informationen innerhalb ihrer Organisation zu teilen / Commerzbank invites you to share information within their organization



*** English Version ***

Dear Max Mustermann,

Muster, Erika from Commerzbank would like to exchange documents securely with you.

To ensure the documents can be exchanged in a protected way, you first need to set up an authentication method once.

How long does this take and what do you need?

The setup usually takes **5 - 10 minutes**.

You will need:

1. A **smartphone**
2. Access to your **email inbox**
3. The **Microsoft Authenticator app** (available free of charge in your smartphone's app store) or another authenticator app of your choice.

Please proceed as follows:

1. Click **“Accept invitation”** in this email.
2. If you are using Gmail or another free mail provider, a one-time code will be sent to you by email to verify your account. The sender of this email is **Commerzbank (via Microsoft)** account.security.noreply@accountprotection.microsoft.com
3. Confirm that our Commerzbank/Microsoft environment may use your **basic information** (e.g. your email address) for verification.
4. Set up an additional security check, the so-called **multi-factor authentication (MFA)**
 - We recommend using the Microsoft Authenticator app. However, you can also use any other authenticator app, such as Google Authenticator
5. At the end of the process, you will be redirected to the homepage of [commerzbank.de](https://www.commerzbank.de). You can simply close this page.

You can find a detailed step-by-step guide here.

What happens next?

Muster, Erika can now exchange files securely with you. You will receive a separate email with a link through which you can access the files that have been shared with you.

important security notice

- The invitation is sent from the **Commerzbank environment**
- In this process, you will **never** be asked for
 - your PIN,
 - your full **online banking login details**, or
 - **TANs** for transfer
- If anything seems **unusual or suspicious** to you, please stop the process and contact your known Commerzbank contact person.

To accept the invitation, please click here:

1 [Accept invitation](#)

Thank you.

Kind regards
Commerzbank AG

Detailed Setup process (PC/Laptop)

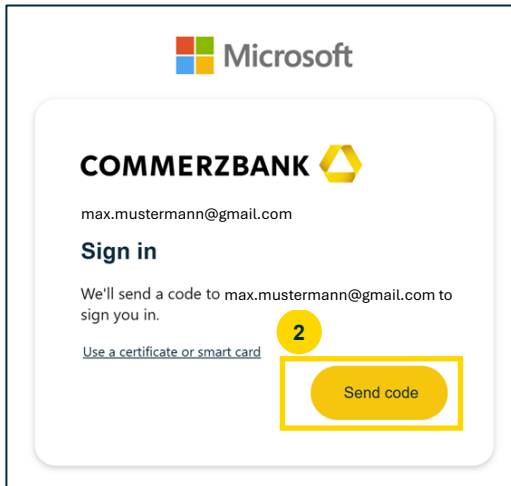


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02

Sign in

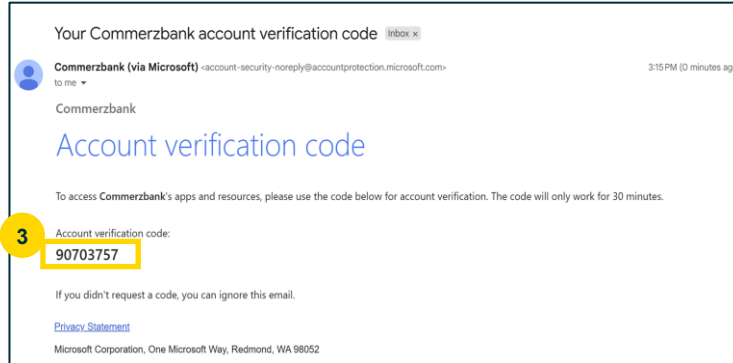
- After clicking “**Accept invitation**” in step 1, a window appears with the message “**Sign in.**”
- Click “**Send code**” **2** to receive a code by email and sign in.
- For Microsoft-based accounts (e.g., outlook.com or some Organisational email addresses) this step is not required.



03

Get a code to sign in

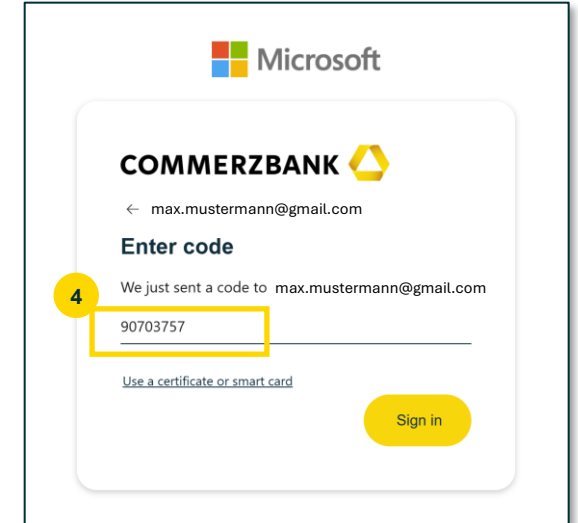
- Look for the email with the code sent by **Microsoft** with the subject: “**Your Commerzbank account verification code**”
- In the middle of the email, you will find a “**Account verification code**”. **3**
- Copy or note this code and then return to the “**Enter code**” box in Step 4.



04

Enter the single-use code from the email **4**

- Now **enter the code from step 3.** **3**
- After doing this, you will automatically be redirected to a new page, which you can see in **step 5.**



Detailed Setup process (PC/Laptop)

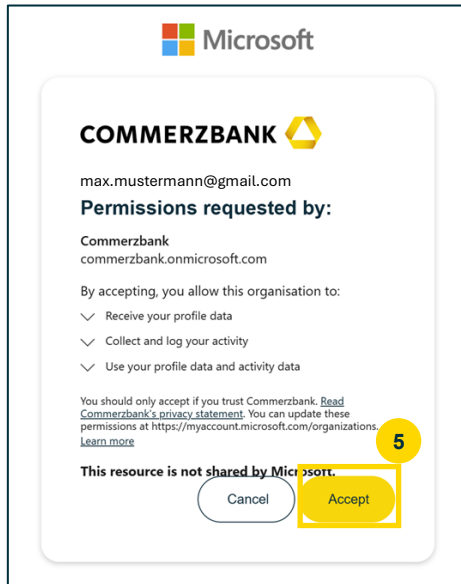


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05

Permissions requested by Commerzbank

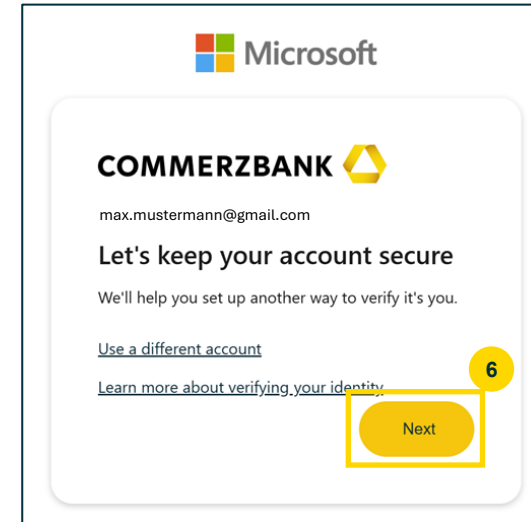
- Click “**Accept**” **5** on this page.
- This is required so that Commerzbank can correctly authorise you to use its file-sharing services. Your data will not be used for any other purpose than system authorisation.



06

Let's keep your account secure

- This step is important for **multifactor authentication**, so you have to click “**Next**” **6** to start the process.
- After clicking “**Next**”, proceed to **step 7**.



Detailed Setup process (PC/Laptop)

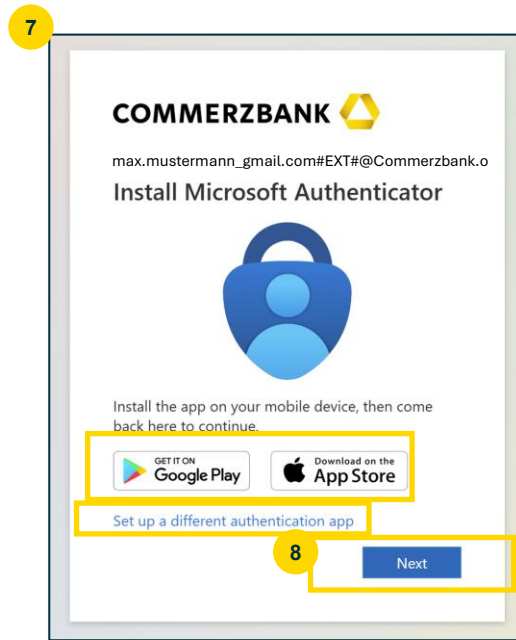


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07

Setting up multifactor authentication (You need your Smartphone now)

- After you click “Next” in step 6, a new window will open asking you to **Install Microsoft Authenticator** **7**. **You should already have this, or another Authenticator App installed, so you can click ‘Next’** **8**. And proceed with “Set up your account in app” on **Step 8**.
- If you have not installed one yet, click “Get on Google Play” or “Download on the App Store.”
- If you need to use a different Authenticator App (e.g., Google Authenticator’), then you can click on ‘Set up a different authentication app’.



Detailed Setup process (PC/Laptop)

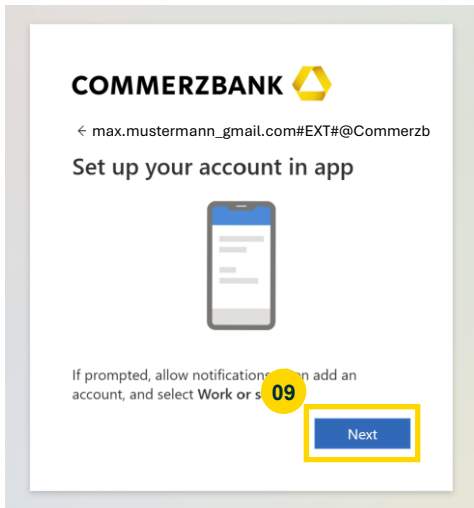


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08

“Set up your account in app”

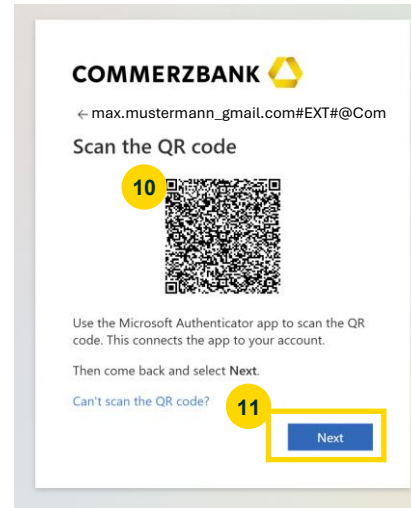
- Click “Next” ⁹ on the “Set up your account in app” page.



09

Get ready to ‘Scan the QR Code’

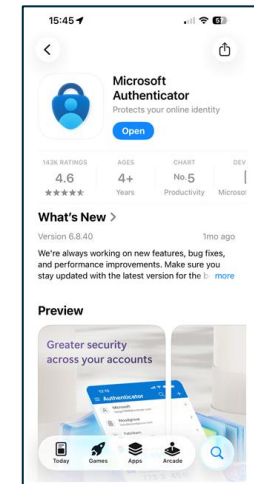
- Now you need to connect the authenticator app to the Commerzbank environment. To do this, you must set up your authenticator app and scan the QR code. ¹⁰
- Before clicking “Next”, ¹¹ follow **steps 10 – 12** how to set up the authenticator app.



10

Open your Authenticator

- After downloading the app, open the Authenticator app on your smartphone.



Detailed Setup process (PC/Laptop)



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11

Open the Microsoft Authenticator app

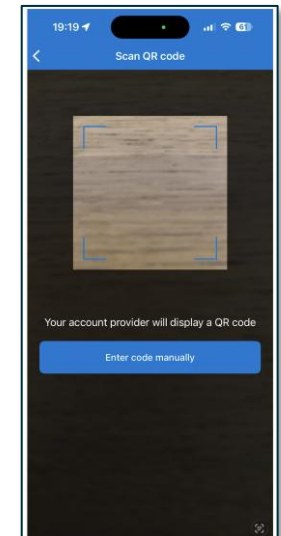
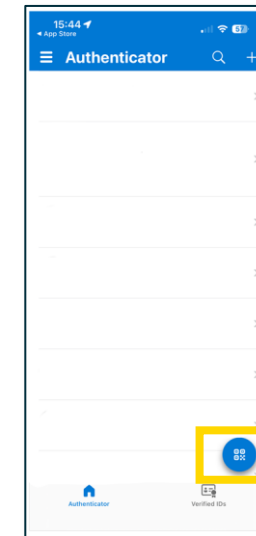
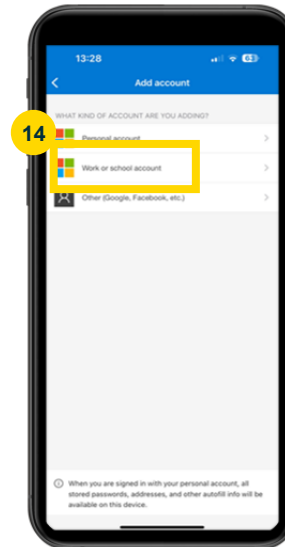
- After opening the app click **“Add account”**. ¹²
This screen only appears when you set up your first account.
- If you have already added accounts in the Authenticator app, click **“+”**. ¹³



12

Choose an account type

- Click **“Work or school account”**. ¹⁴
- You will **now be able to scan QR codes**, ¹⁵
scan the QR-Code from **step 09** and follow the guide.
- NOTE: If you are not using the Microsoft Authenticator app, some of the next steps will look different, and you will still need to enter a One-Time Password code.



Detailed Setup process (PC/Laptop)



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13

Let's try it out

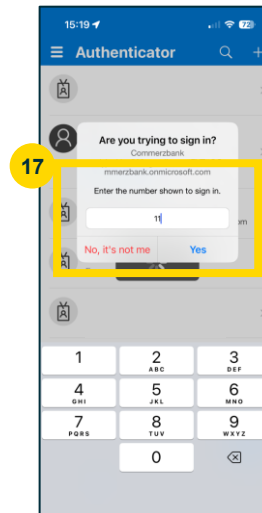
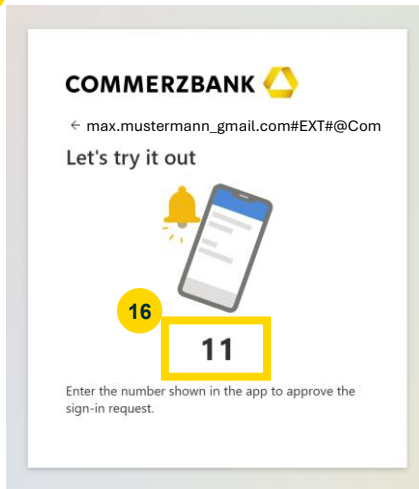
- After you have scanned the QR code from step 9 with the authenticator app, the app is **connected** and a page with the wording “**Let's try it out**” will appear, displaying a number.
- **Save or remember this number for step 14.**

14

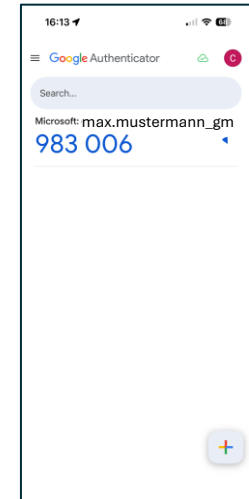
Are you trying to sign in?

- You should receive a **notification on your smartphone** from the **authenticator app** that someone is trying to sign in. Tap this notification and enter the number from step 13. **16**
- Then click “**Yes**” **17** to approve the sign-in. After this, proceed with step 15.

16



Microsoft Authenticator App example



Google Authenticator App example

Detailed Setup process (PC/Laptop)

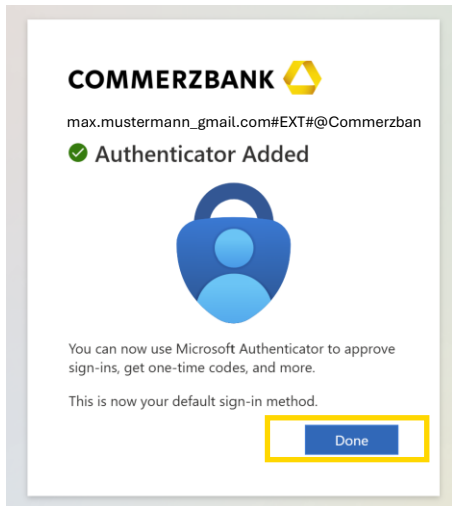


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15

Authenticator added

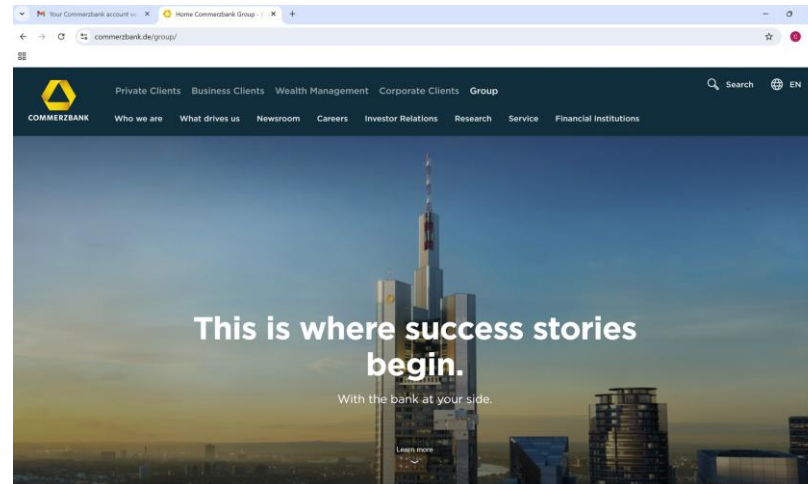
- You have **successfully added** the authenticator to your account. Click **“Done”** to be directed to the Commerzbank site and proceed with step 16.



16

Commerzbank home page

- After clicking **“Done”** in step 15, you will be taken to the Commerzbank home page.
- Now you only have one more thing to do.



17

Wait for your Commerzbank counterpart to share information with you.

- After this, the Commerzbank employee can share files or folders with you, either as read-only or with read-write access if they need you to upload information. You will receive a link from them directly.



Detailed Setup process for Smartphone / Mobile device

Chapter 2

Detailed Setup process (Smart/Mobile Device)



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Preparation

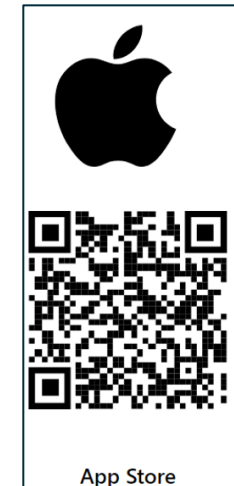
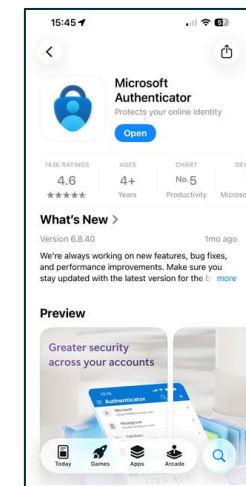
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Detailed Setup process (Smart/Mobile Device)

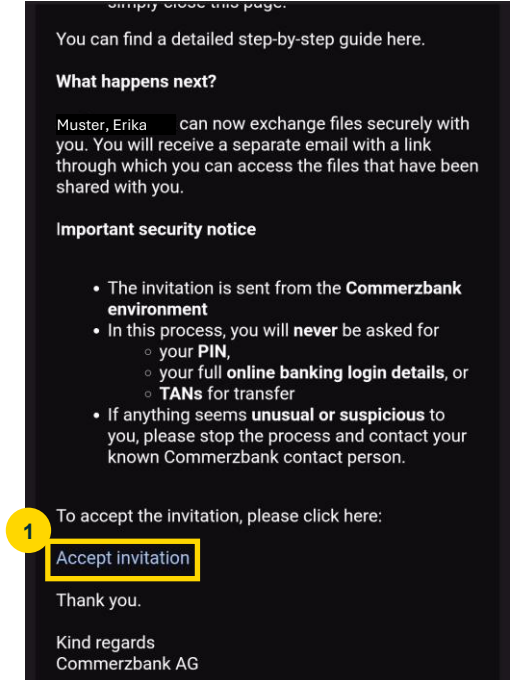
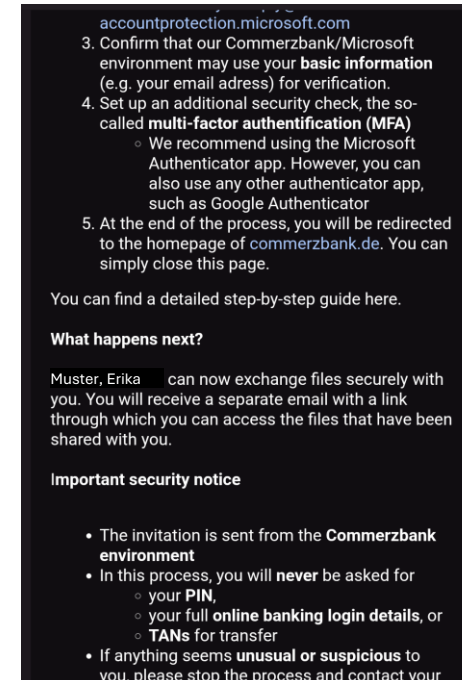
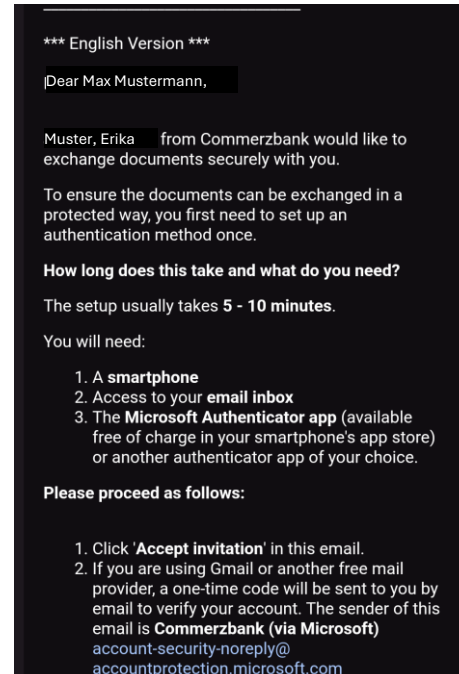
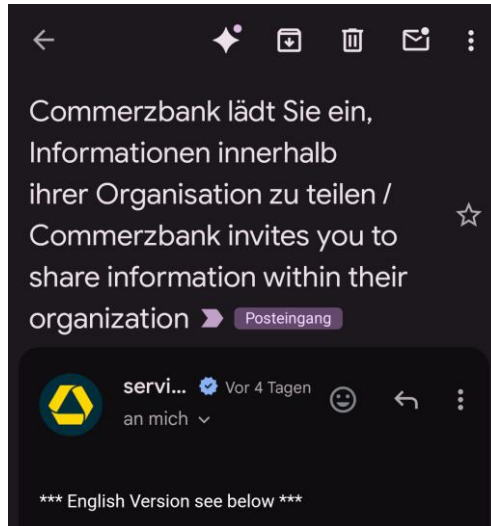


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01

Invitation Mailing

- Check your email inbox for a message with the subject: **“Commerzbank invites you to share information within their organization.”**
- Click **1** **“Accept invitation”** at the bottom of the mail to start the setup. A window will open and will ask you to get a code to sign in, **Follow Steps 2-4.**



Detailed Setup process (Smart/Mobile Device)

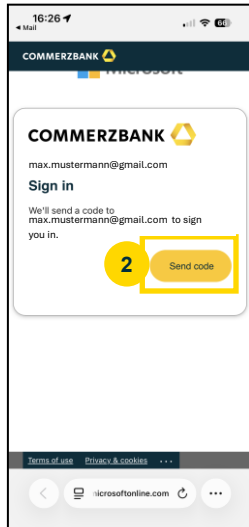


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02

Sign in

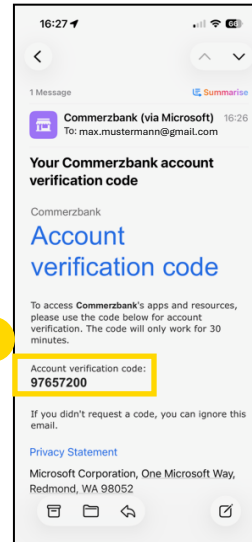
- After clicking “**Accept invitation**” in step 1, a page appears with the message “**Sign in.**”
- Click “**Send code**” **2** to receive a code by email and sign in.
- For Microsoft-based accounts (e.g., outlook.com or some Organisational email addresses) this step is not required.



03

Get a code to sign in

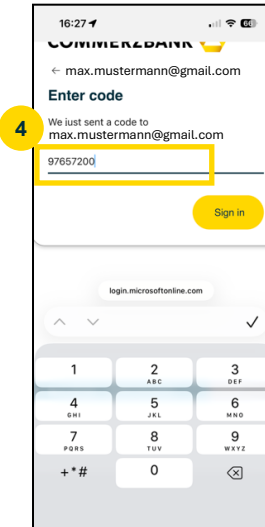
- Look for the email with the code sent by **Microsoft** with the subject: “**Your Commerzbank account verification code**”
- In the middle of the email, you will find a “**Account verification code**”. **3**
- Copy or note this code and then return to the “**Enter code**” box in Step 4.



04

Enter the single-use code from the email **4**

- Now **enter the code from step 3.** **3**
- After doing this, you will automatically be redirected to a new page, which you can see in **step 5.**



Detailed Setup process (Smart/Mobile Device)

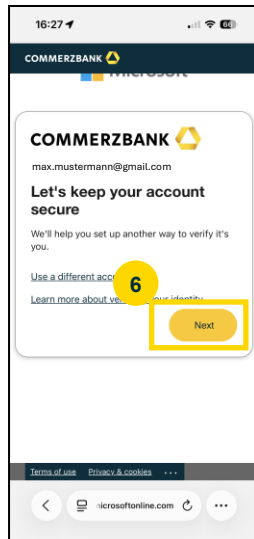


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05

Let's keep your account secure

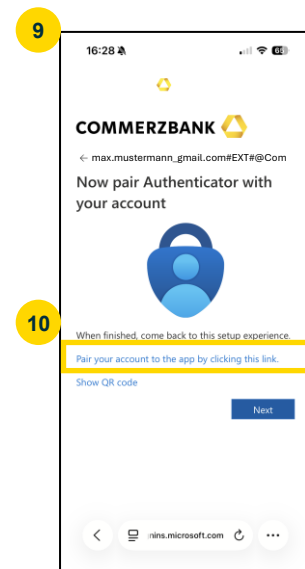
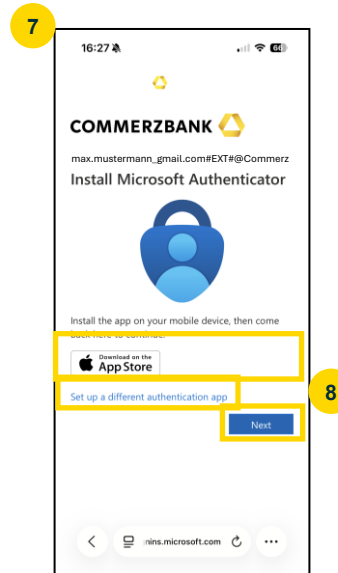
- This step is important for **multifactor authentication**, so you have to click “Next” **6** to start the process.
- After clicking “Next”, proceed to **step 7**.



06

Setting up multifactor authentication (You need your Smartphone now)

- A new window will open asking you to **Install Microsoft Authenticator** **7**. You should already have this, or another Authenticator App installed, so you can click ‘Next’. **8** And proceed with “Now pair Authenticator with your account” **9** by clicking “Pair your account to the app by clicking this link”. **10**
- If you have not installed one yet, click “Get on Google Play” or “Download on the App Store.”
- If you need to use a different Authenticator App (e.g., Google Authenticator), then you can click on ‘Set up a different authentication app’.



Detailed Setup process (Smart/Mobile Device)

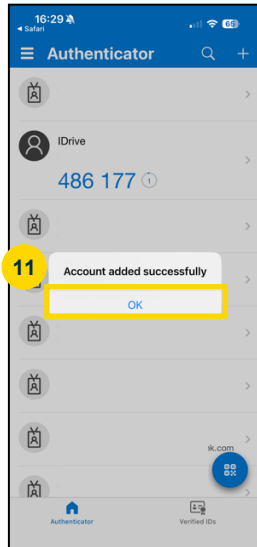


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07

Account added successfully

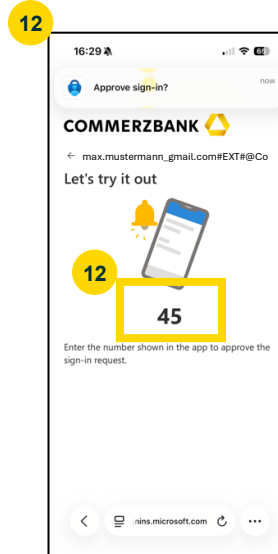
- After you have clicked “**Pair your account to the app by clicking this link,**” you will automatically be directed to the “**Account added successfully**” page. Click **11** “**OK**” and switch back to the process.



08

Let's try it out

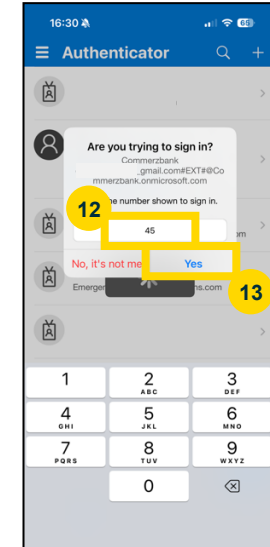
- After you have clicked “**OK**” in step 7, the authenticator app is **connected** and a page with the wording “**Let's try it out**” will appear, displaying a number.
- Save or remember this number for step 09.**



09

Are you trying to sign in?

- You should receive a **notification on your smartphone** from the **authenticator app** that someone is trying to sign in. Tap this notification and enter the number from step 08. **12**
- Then click “**Yes**” **13** to approve the sign-in. After this, proceed with step 10.



Detailed Setup process (Smart/Mobile Device)

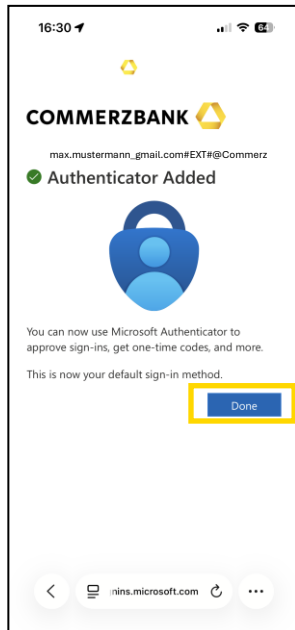


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10

Authenticator added

- You have **successfully added** the authenticator to your account. Click **“Done”** to be directed to the Commerzbank site and proceed with step 11.



11

Commerzbank home page

- After clicking **“Done”** in step 10, you will be taken to the Commerzbank home page.
- Now you only have one more thing to do.



12

Wait for your Commerzbank counterpart to share information with you.

- After this, the Commerzbank employee can share files or folders with you, either as read-only or with read-write access if they need you to upload information. You will receive a link from them directly