

Creating Your Account

Finding Your TreeFort Administrator

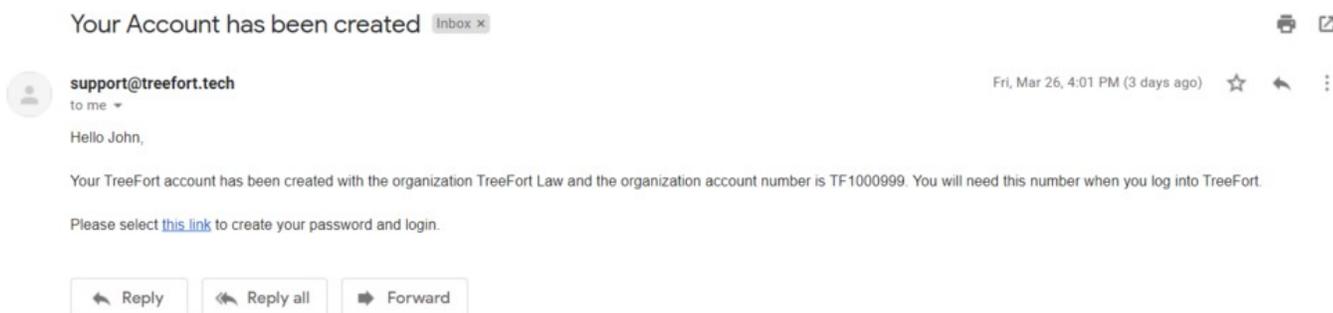
If you do not already have an account in the TreeFort portal, you will have to contact a TreeFort administrator at your organization who has permission to create new users. There may be one or more TreeFort administrators managing your entire organization, or one or more administrators managing the business unit or team you are a part of. Once you have identified a TreeFort administrator, they will be able to initiate the account creation process using their TreeFort account. More information on how an administrator can initiate the account creation process can be found [here](#).

Completing Your ID Verification

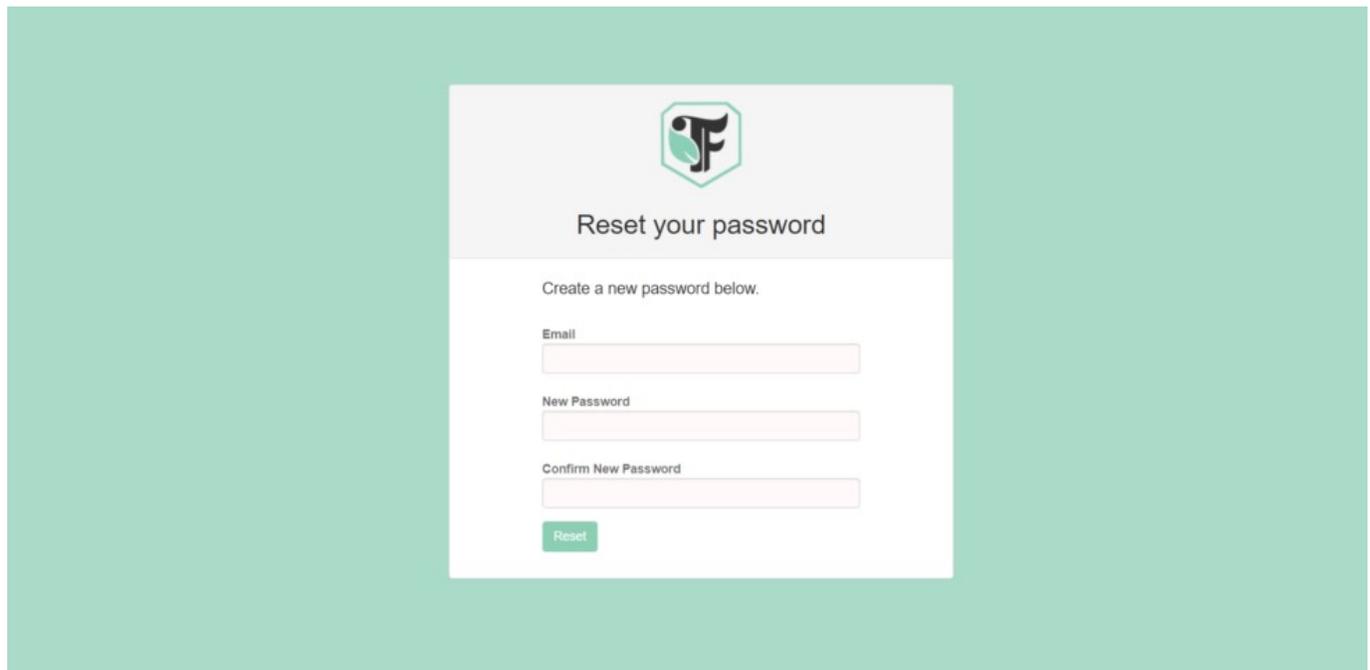
Every user added to the TreeFort portal by an administrator at your organization must complete the same ID verification process that your clients will experience before the account can be created. Once an administrator at your organization initiates the account creation process, you will receive an email with a link to begin the ID verification process. You can find a full step-by-step walkthrough of the ID verification process you will have to complete [here](#) under **The Client Experience**.

Creating Your Account

Once you have completed the ID verification process, the administrator who initiated the account creation process will be notified that you have completed the ID verification process, and will be able to review the TreeFort ID verification report that was returned to them. After they have reviewed the report, they will have the option to approve you as a new user in the TreeFort portal. If you are approved, you will receive the following email from TreeFort to create your account:



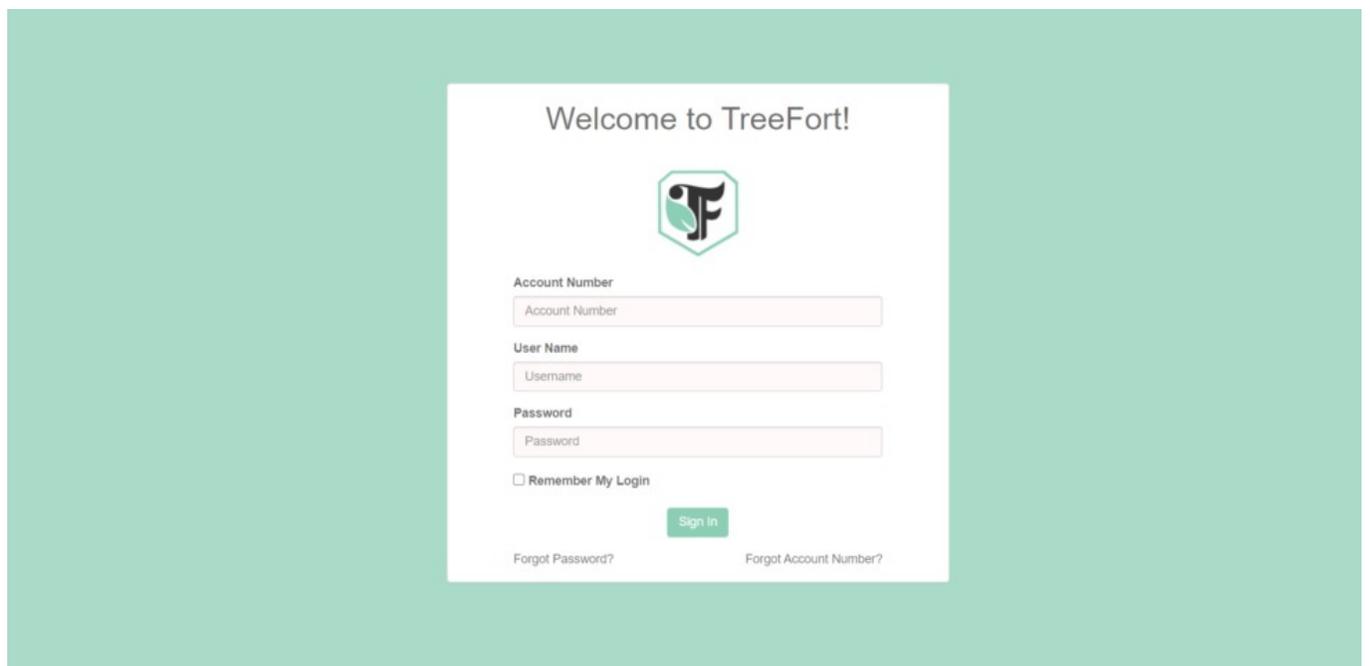
Selecting the above link will direct you to the password creation page below.



The screenshot shows a white form titled "Reset your password" centered on a light green background. At the top of the form is the TreeFort logo, a stylized 'TF' inside a green leaf-like shape. Below the title, the text "Reset your password" is displayed. Underneath, it says "Create a new password below." There are three input fields: "Email", "New Password", and "Confirm New Password". Each field has a light pink border. At the bottom of the form is a green button labeled "Reset".

You will need to enter your email address and the password you would like to use to log into your TreeFort account. Once you have entered the required information, select **Reset** to finish creating your TreeFort account. You will be directed to the login page below.

Logging In



The screenshot shows a white form titled "Welcome to TreeFort!" centered on a light green background. At the top of the form is the TreeFort logo. Below the title, the text "Welcome to TreeFort!" is displayed. Underneath, there are three input fields: "Account Number", "User Name", and "Password". Each field has a light pink border. Below the "User Name" field is a checkbox labeled "Remember My Login". At the bottom of the form is a green button labeled "Sign In". Below the "Sign In" button are two links: "Forgot Password?" and "Forgot Account Number?".

To log into your TreeFort account, you will need the following information:

Account Number – this number was provided in the email with the link to create your TreeFort account. If you forgot your Account Number, you can follow the process outlined [here](#).

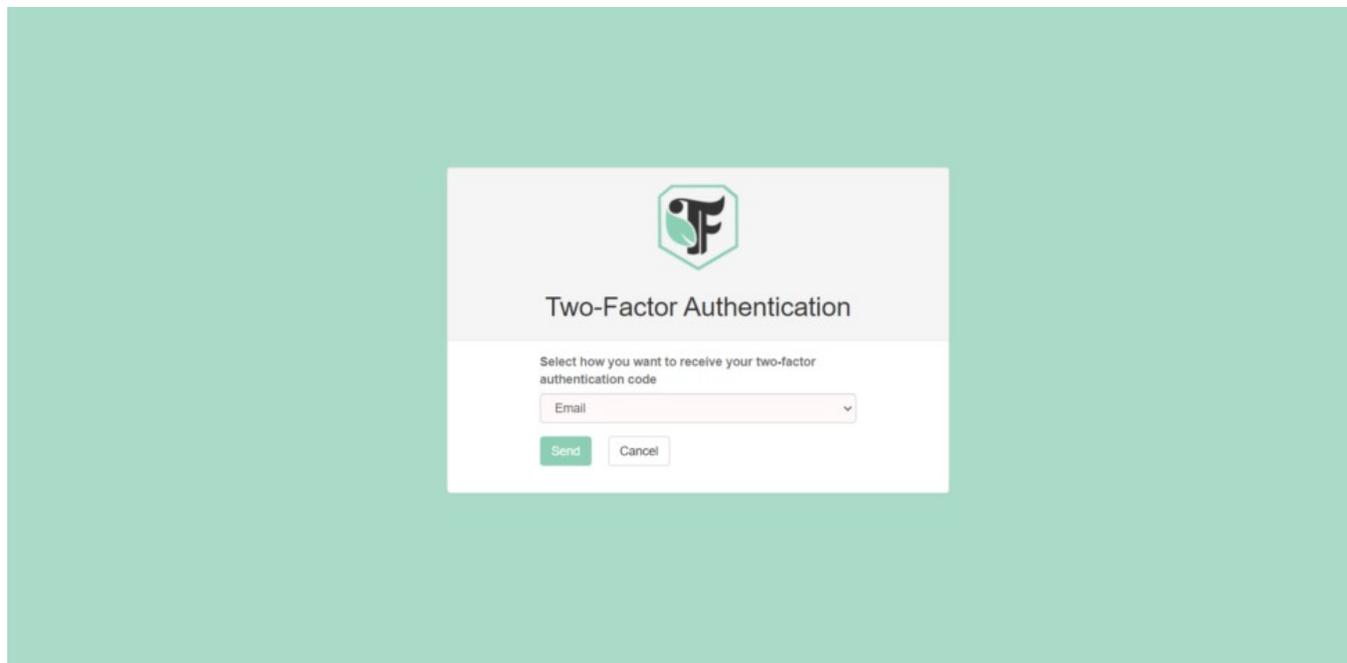
User Name – this is the email address associated with your TreeFort account.

Password – this is the password you used when you first created your TreeFort account, or subsequently reset. If you forgot your password, you can follow the process outlined [here](#).

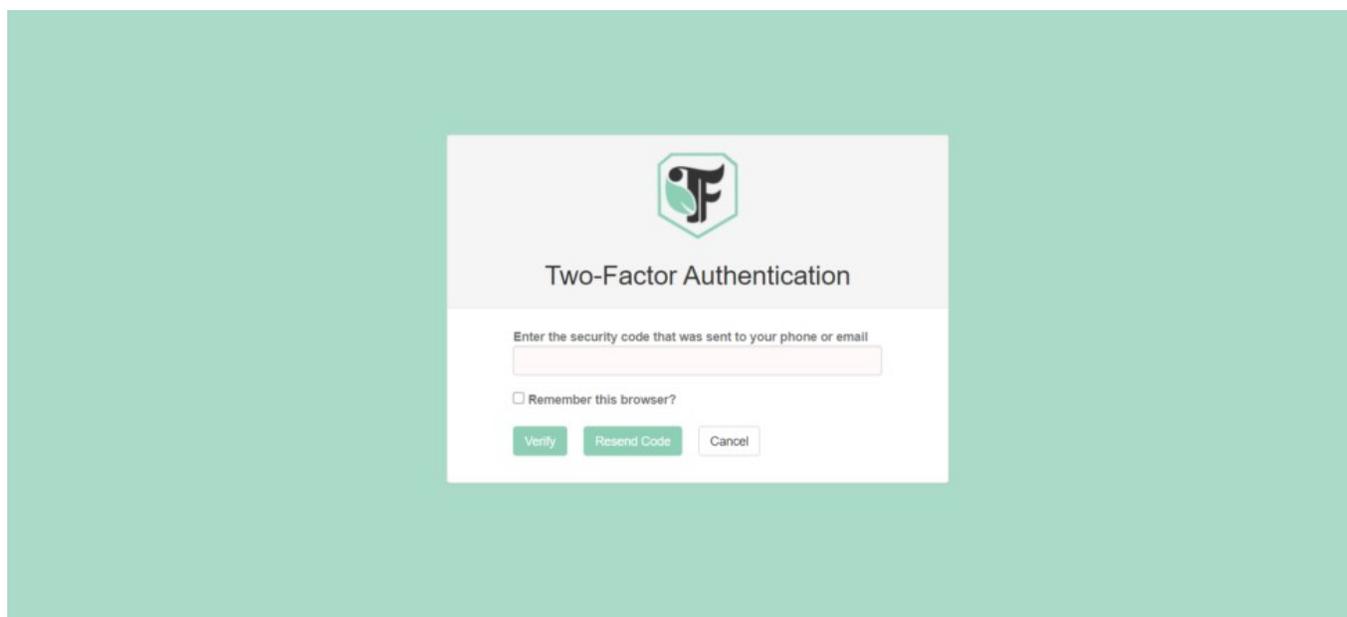
Select **Remember My Login** if you trust the device you are accessing your TreeFort account from and would like to remain logged in for your next session.

Two-Factor Authentication

If you are accessing your TreeFort account from a new web browser (or you have recently reset your cookies on your browser), you may be asked to go through a two-factor authentication process and will be directed to the page shown below.



You will be able to select how you want to receive your two-factor authentication code (i.e. via email or cell phone), and you can select **Send** to send the code. You will be directed to the following page, where you can enter the authentication code you received via email or cell phone.



Select **Remember this browser** if you trust the device you are accessing your TreeFort account from and would like to skip the two-factor authentication process the next time you access your TreeFort account from this browser. Finally, select **Verify** to validate the authentication code entered and log into your TreeFort account.