





Sterling provides a seamless, secure login experience

Introduction

At Sterling, our goal is to provide you with a seamless and secure login experience.

Our client login process provides you with the following benefits:

- A simplified experience
- Reduced time spent entering passwords
- Unified access for clients with multiple Sterling user accounts

This user guide will walk you through the client login experience.



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Before you begin...

If you log in to multiple accounts within the Sterling service that you use, it is essential that all of your accounts get set up under one set of credentials. Be sure to use the credentials for what you consider your "primary account" as you proceed through the steps below. If you only have a single Sterling account, just use those credentials.

Getting Started

Step One

Enter your username and click Next.

Step Two

Enter your password and click Sign In.

Please Note: You have the option to check the Remember me box so that the next time you log in, it prefills your username going forward.

If you have forgotten your password, click on the Forgot Password link to reset your password.

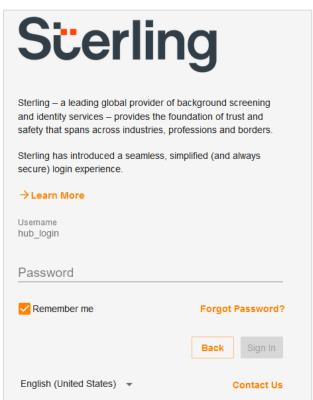
After clicking on the link, you will receive an email with "Your Verification Code" as the subject line. Enter the verification code from the email and your new password.

Your password must include the following:

- 8-20 characters
- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character

Please Note: If you exceed the number of allowed login attempts, your account will be locked. Your account will automatically unlock after a maximum of 15 minutes.







Step Three

Once you enter your username and password correctly, you will see a Success message when logging in for the first time.

If you are a returning user, you will not receive a Success message. Instead, you will be redirected to your Account Dashboard.

From here, you can click Continue which will log you into your Sterling account. You also have the option to click Add Account, which will redirect you to the Account Dashboard to add another Sterling account. (See Step 5 below.)

Please Note: If you receive a "Your email address is in use by a different login" message, please proceed to Step Four.



Step Four

If you receive a "Your email address is in use by a different login" message, this is an indication that your email address or phone number is already in use by another account. This could be because you have more than one account with Sterling or because you share an email address with another account.

Upon receiving this message, you have three options:

- Choose to skip this step.
 - Please Note: If you skip this step, you will not receive any password reset emails, unless you actively update your email address under Communications Settings in Account Settings.
- Update your email address.
- Pause here and reference the Client Login Experience Multiple Accounts user guide to link your accounts to one login.

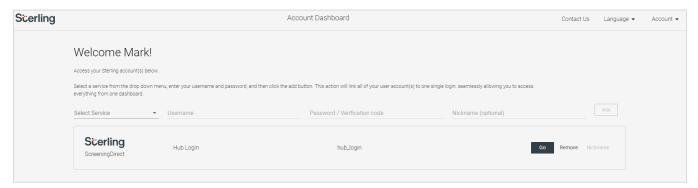




Step Five

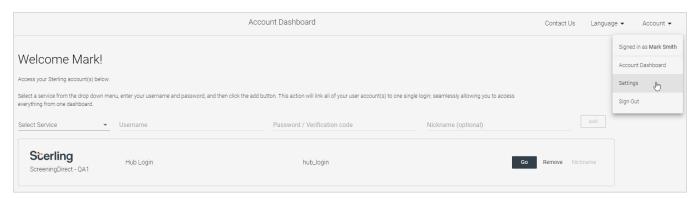
Once you reach your Account Dashboard, you will have the option of adding another account or continuing to an existing account by clicking the Go button.

Please Note: You may choose to nickname your account. This nickname will only appear on the Account Dashboard.

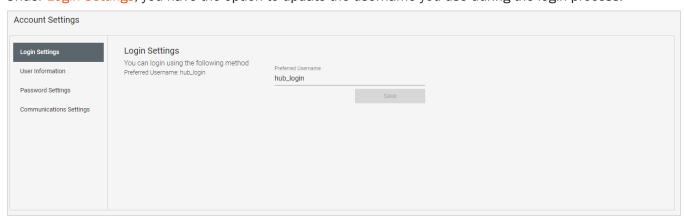


Settings

Once you have accessed your Account Dashboard, you will see an Account dropdown on the top right side of the screen. If you click this dropdown and select the Settings option, you will be able to update your Login Settings, User Information, Password Settings, and Communications Settings.

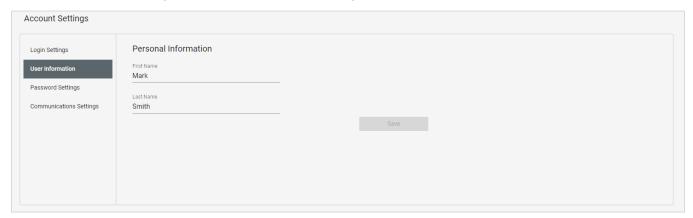


Under Login Settings, you have the option to update the username you use during the login process.

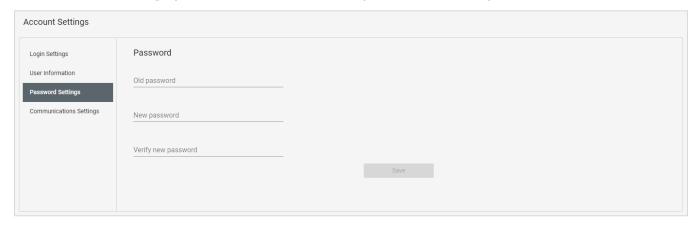




Under User Information, you have the option to update your First Name and Last Name.



Under Password Settings, you have the option to update your password at any time.



Under Communication Settings, you have the option to update the email address tied to your login.

Please Note: If you chose the Skip This Step" option from Step Four above, this area is where you can update your email address.

