



Password Reset Security Questions: Admin

Table of Contents

Introduction	1
Organization Settings	1
Customizing Available Security Questions	3

Introduction

To better protect data security and customer information, Total Expert includes a security question feature that you can set up for your organization. Once configured for the organization, each user then sets up questions for their account that they must answer before a they can reset their password. This extra proof of identity makes it much less likely that a compromised password can be used to access sensitive information stored in a user account.

Your organization can require security questions for all users in your organization. If it is required, you can give users the option to skip setting up their questions a configurable number of times before they must complete this setup.

Organization Settings

After you complete the following steps, each individual user is responsible for configuring security questions in their own account. See *Password Reset Security Questions: User* for more information.

1. Navigate to **Organization Admin** → **Password Settings** and locate the Security Questions Settings section. You may have to scroll down.



Organization Password Settings

Re-use limit

Reset period (days)

Disable native CRM login

Enable Lockout

login page.

Security Questions Settings Save

Require security questions for all users

Security Questions Setup

Number of required security questions - +

Number of times users can skip setup - +

Note: Users will be asked to select and answer questions on their next login.

Require admin approval for password resets initiated before user setup is complete

Password Reset

Number of answers required during password reset - +

[Customize Security Questions \(optional\)](#)

Note: By default, Total Expert provides a list of 6 security questions for users to choose from. Customize security questions to edit the list and/or add custom questions.

2. Click the **Require security questions for all users** toggle switch to move it to the **on** (green) position.
 - With this switch turned on, security questions are enabled for all users in your organization.
 - With this switch turned off, security questions are disabled for all users in your organization, and the remaining settings do not apply.
3. Enter a value in the **Number of required security questions** field. This determines the minimum number of questions each user must set up. For each of these, a user will have to select an available question from a list and provide their answer to that question. Users can optionally set up more than the minimum.
4. Enter a value in the **Number of times users can skip setup** field. After the organization setup is complete, the next time each user logs in, they will be presented with a screen where they can select their security questions. This value determines how many times a given user can bypass that screen and enter their account without setting up their questions. Enter to prevent users from accessing their account without setting up their questions.

Tip

Click the **[+]** and **[-]** buttons in these fields to increment the current values up or down.

5. (optional) Check the **Require admin approval for password resets initiated before user setup is complete** box. This governs what happens when a user *who has not yet set up any security questions* requests to reset their password:
 - If this box is not checked, the user can freely reset their own password the same way they could if security questions were turned off.
 - If this box is checked, that request goes to a system administrator to be approved.
 - A field appears below the checkbox where you must select 1 or more users who should handle these requests.

**Warning**

If this box is checked and you do not select any users, you cannot save your changes in the Security Questions section.

Note

This setting does not affect users who have already set up their security questions. If one of these users requests to reset their password, they will simply be challenged with their security questions.

6. Enter a value in the **Number of answers required during password reset** field. If a user requests to reset their password, this value determines how many of their configured questions they must answer to proceed.

Tip

This is not the same as the number of required security questions in step 3 above. That value determines how many question/answer pairs each user must set up. This value determines how many questions a user must answer correctly to reset their password and should not exceed the value in step 3.

Note

If this value is smaller than the number of questions the user has configured, the system will select randomly from among the user's questions.

For example, if a user has set up 3 questions, but you only require them to answer 2 to reset their password, the system picks any 2 of the 3 to challenge that user when they attempt to reset their password.

Warning

For questions to be available for user setup, you must select them in the Customize Security Questions panel. (See Customizing Available Security Questions below.) If you have not selected at least as many questions as the value you entered in the Number of required security questions field (step 3 above), you will see an error when you attempt to save. You must select more questions before you can save your changes.

7. Click the **Save** button in the upper-right corner of the Security Question Settings section.

Warning

If you do not click the Save button, your changes will be lost.

Customizing Available Security Questions

At the bottom of the Security Questions Settings panel:

1. Click **Customize Security Questions**. The Customize Security Questions slide-out panel opens, where you can configure which questions are available for users in your organization to select from.



Search all contacts

login page.

Security Questions Settings

Require security questions for all users

Security Questions Setup

Number of required security questions: 2

Number of times users can skip setup: 2

Note: Users will be asked to select and answer questions on their next login.

Require admin approval for password resets initiated before user setup is complete

Password Reset

Number of answers required during password reset: 1

[Customize Security Questions \(optional\)](#)

Note: By default, Total Expert provides a list of 6 security questions for users to choose from. Customize questions to edit the list and/or add custom questions.

Customize Security Questions

Default Questions

- What was your first pet's name?
- What was the name of your first stuffed toy?
- What was your childhood nickname?
- What's the name of the city where your parents met?
- What's the first name of your oldest cousin?
- What's the name of the first school you attended?
- Where was the destination of your most memorable school field trip?
- What was your math teacher's surname in your 8th year of school?
- What is the name of a college you applied to but didn't attend?
- What was your driving instructor's first name?

Custom Questions

- Is this a sample question?

2. In the Customize Security Questions slide-out panel:
 - a. Under **Default Questions**, check the boxes for any of the provided questions you want to be available for your users.
 - b. Under **Custom Questions**, click the **+Add Question** button.
 - i. Type your custom question in the box.
 - ii. Click the **✓ Done** button.
 - iii. The question is displayed in the Custom Questions section. Check the box to the left to make it available for your users.
 - c. Repeat step 2b for any additional custom questions you want to be available.



Note

You can modify any of your selections in this panel. This includes modifying or deleting a custom question (click the **Edit** (pencil icon) button or **Delete** (trash can icon) button to the right of a custom question).

You cannot edit a custom question that any users have already used in the setup for their account.

If you attempt to delete a custom question that any users have already used, a pop-up box appears to inform you how many users will be affected. Click the **Yes** button to confirm, then save your changes; affected users who had only set up the minimum number of questions will be prompted to set up a new question the next time they log in.

- d. Click the **Save Security Question** button to apply your changes and close the panel.

Tip

The total number of questions (default and custom combined) with checkmarks must match or exceed the value entered in the Number of required security questions field in the Security Questions Settings section. (If not, you will not be able to save the selections in that section.) In the example shown above, 4 questions are selected, and users are required to set up 2 questions, so this configuration would be valid.

Select as many of these questions as is practical to avoid this potential issue and to give your users as many options as possible.