User guide

Managed File Transfer - MFT
Logging In & Authentication

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First Time Login

Welcome to the BOK Financial Managed File Transfer System

Welcome to the **BOK Financial Managed File Transfer (MFT) System**, located at https://mft.bokf.com. This system will allow you to simply and securely upload and download Lockbox, ACH, Recon, and other types of files to and from the Bank.

This document will provide the instructions you need to get up and running in the MFT System quickly and easily.

Enrolling in Okta

To get started, you will need to be enrolled in Okta. Okta is a US-based access management and identity company that we use to provide secure connections.

When your account is setup for the BOK Financial Managed File Transfer System, an Okta account is also created for you. Okta will be used to authenticate/verify your identity and log you into the Managed File Transfer System.

Shortly after account creation, you should receive an e-mail from Okta, noreply@okta.com to activate your new account.

Click the blue "Activate Okta Account" link, and a pop-up window opens for you to create your password.

First Time Login

Create a new password that adheres to the password requirements shown below. Please enter that new password into the "Enter password" and "Re-enter password" fields and click the blue "Next" button.

Next, you must choose your multi-factor security method. You may choose any one (or more) of the following. To make your selection, click "Set up" under your chosen method.

Once the first security method setup is complete, you are directed back to the list of remaining options. You may choose to setup another or click the blue "Setup later" button to continue into the platform.

First Time Login - Google Authenticator

If you elected "Google Authenticator" as your method of authentication, first, you must download the app from your mobile device App Store then launch Google Authenticator.
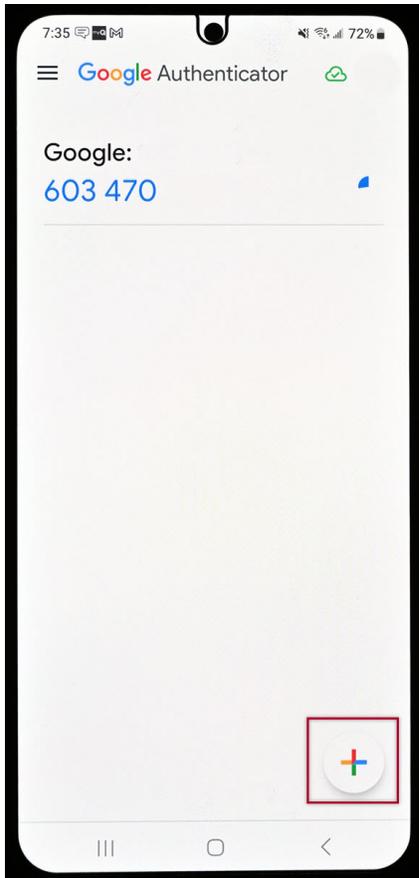
Once you have downloaded and launched the Google Authenticator app, your phone screen will be similar to what is shown here. If you use other applications with Google Authenticator, you may have an existing program listed. To add MFT, select the "+" sign to add another.
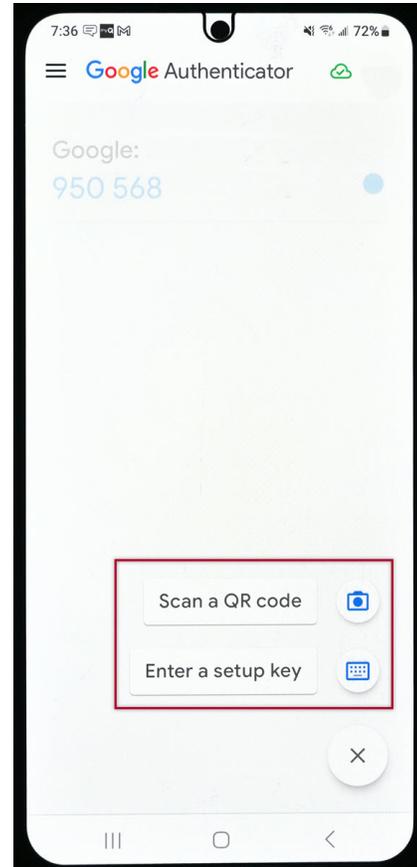
Next, select "Scan a QR Code".

First Time Login - Google Authenticator

To scan the QR code, hold your phone to the image on you computer screen and your phone will automatically capture the image. When it is complete, click the blue "Next" button.
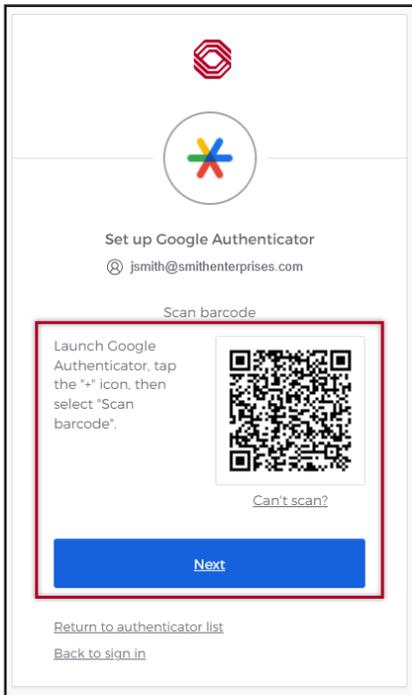
You will now see the authenication codes for the MFT application in addition to others you may be using. Be sure to use the right code for MFT when time to authenticate.

Enter the current code displayed in the Google Authenticator app for MFT in the "Enter code" field, then click the blue "Verify" button. When the Google Authenticator sync is complete, you are directed back to the "Set up security methods" options.
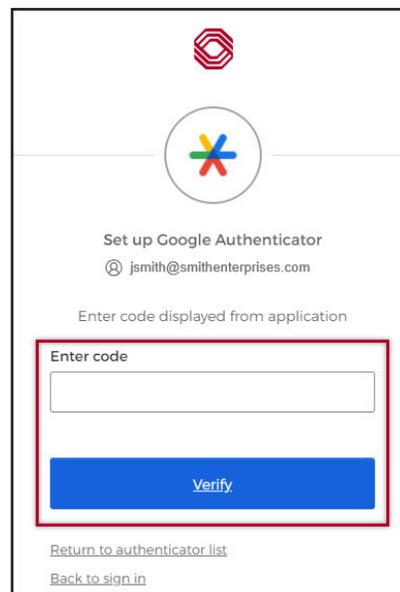
First Time Login - Okta Verify

 If you elected "Okta Verify" as your method of authentication, first, you must download the app from your mobile device App Store then launch Okta Verify. Okta Verify is the preferred security method to use with MFT.

Once you have downloaded and launched the Okta Verify app, your phone screen will be similar to what is shown here. If you use other applications with Okta Verify, you may have an existing program listed. To add MFT, select the "+" sign to add another.
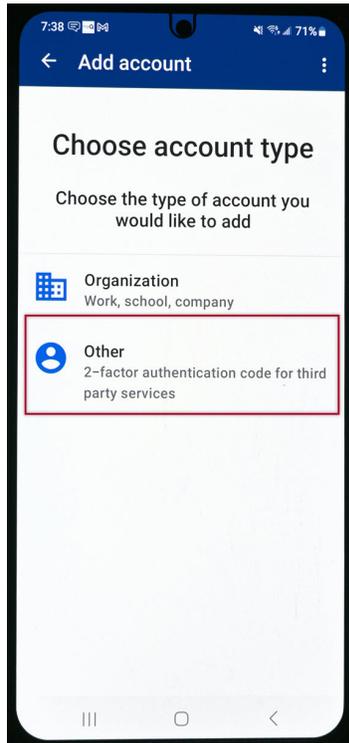
You are then provded two options, select "Other" which is used for two-factor authentication.

Next, select "Scan a QR code".

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First Time Login - Okta Verify

To scan the QR code, hold your phone to the image on you computer screen and your phone will automatically capture the image and sync. When it is complete select "Done" on the app.

When the Okta Verify sync is complete, you are directed back to the "Set up security methods" options.

You will now see the authenication codes for the MFT application in addition to others you may be using. Be sure to use the right code for MFT when time to authenticate. Since Okta Verify has "Autentication Code" and "Push Notification" options, both are automatically selected and push notification will be the default. This can easily be adjusted by selecting the MFT account in the app and unchecking the method you do not want to use and will not appear as an option in MFT.

First Time Login - Phone (SMS Text)

If you elected "Phone" as your method of authentication, you will receive a screen to input the cell phone number for SMS texts.

Enter your ten-digit cell phone number into the "Phone number" field, then click the blue "Receive a code via SMS" button.

Your phone will receive a text message stating, "Your verification code is "######".
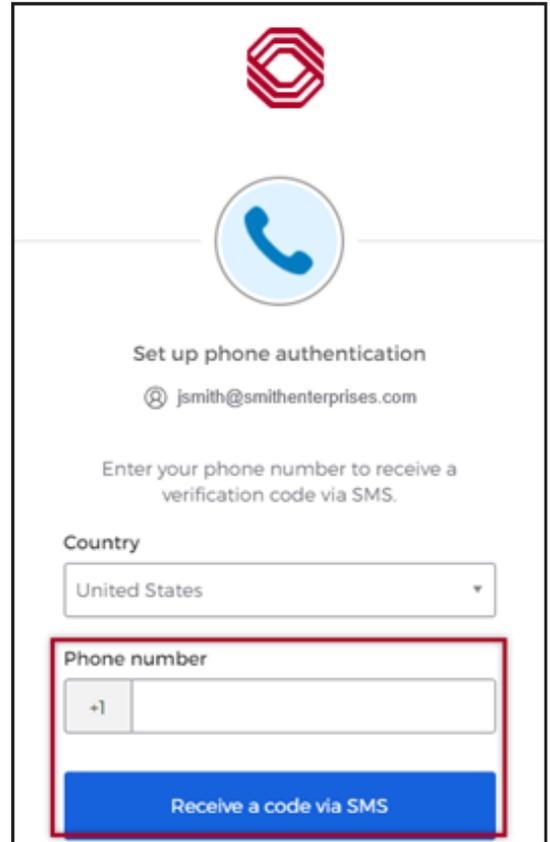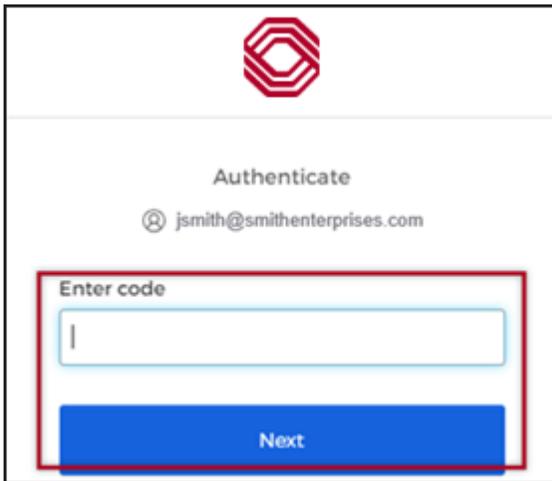
You should now see this authentication prompt:

Enter the verification code that you just received on your phone into the "Enter code" field and click the blue "Next" button.

You are directed back to the "Set up security methods" options.

Change Security Method or Password

Should you want to make changes to your Security Method, including password, access your Okta account at https://bokfmft.okta.com. Login with the same "Username" and "Password" as MFT. You will also be required to authenticate before your access to Okta is complete.
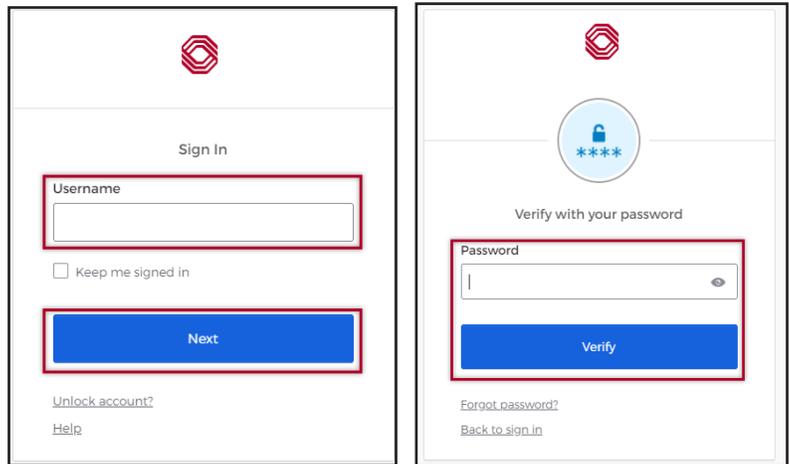
Once logged into Okta, you will receive a landing page similar to the one below.
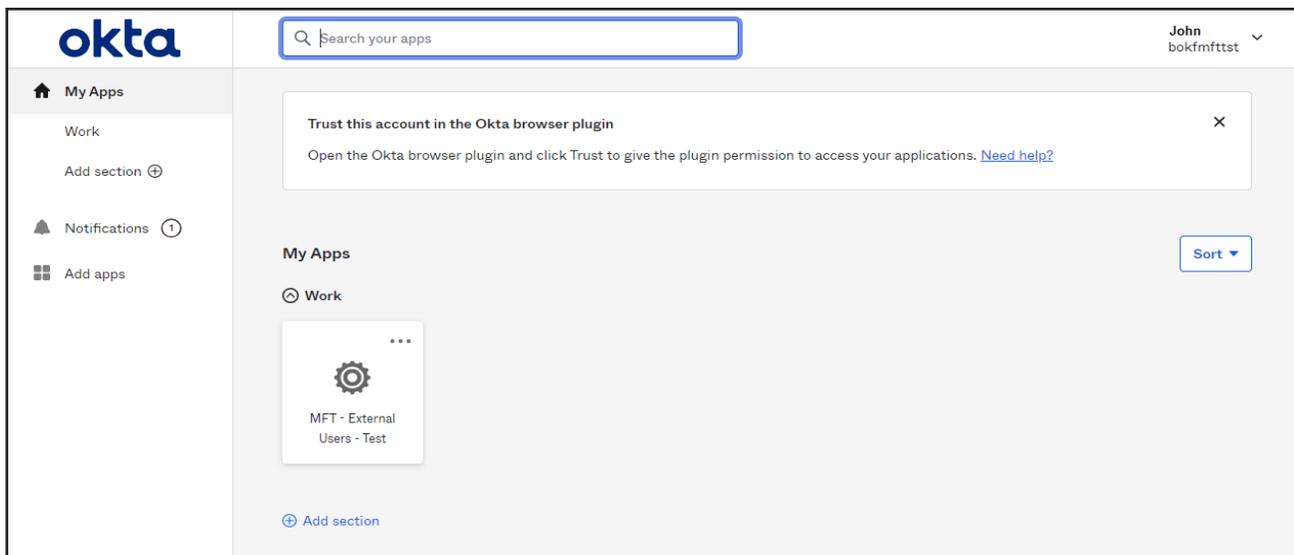
To begin the process of changing security method or password, click "Your Name" in the top right corner of the screen to display the menu.

Then click "Settings".
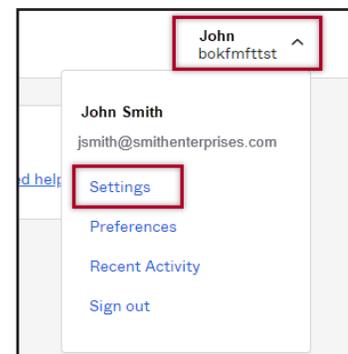
Change Security Method or Password

- To remove a particular security method, click "Remove" next to the method to be removed.

- To add a security method, click "Setup" next to the one to add. You will follow the same setup process as shown in previous pages of this guide.

- Some security methods allow for mulitple phones. Click "Set up another" to add another phone.

- For all changes, you will go through the authentication process currently setup before changes can be made.

To change your password, click "Reset" next to password.

A pop up display appears confirming the password reset, click "Yes".
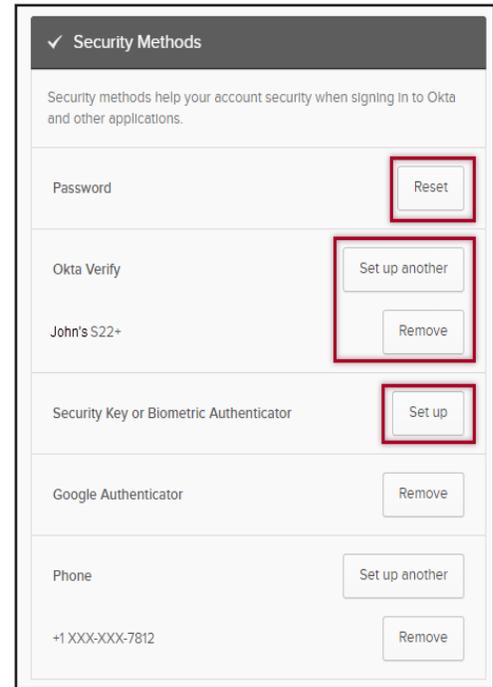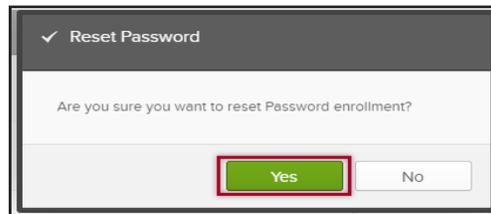
Input your current "Password" and click the blue "Verify" button. You will authenticate using your security method.
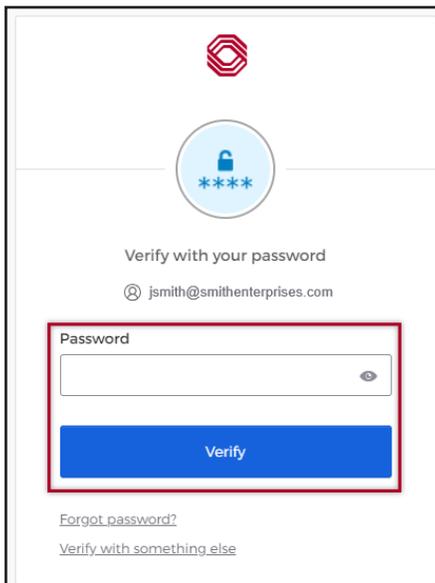
Then you will input your new password in both the "New password" and "Re-enter password" fields. When complete, click the blue "Reset Password" button. You will receive a successful message when the new password is accepted.
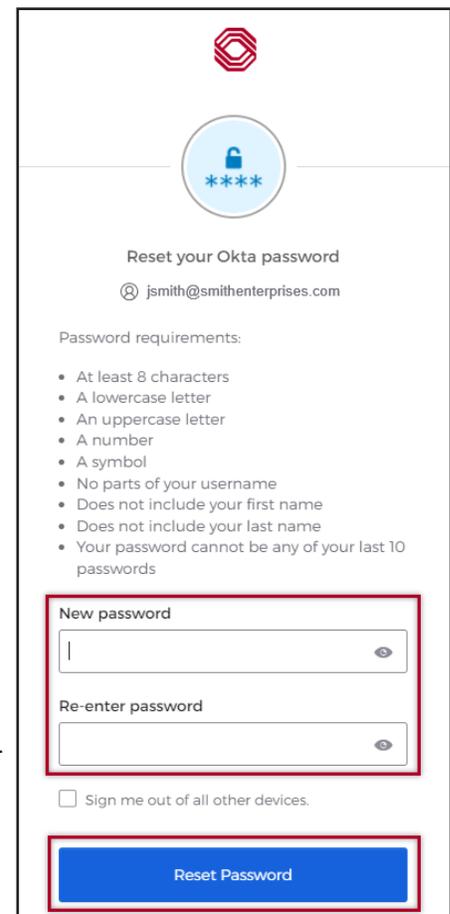
Logging In
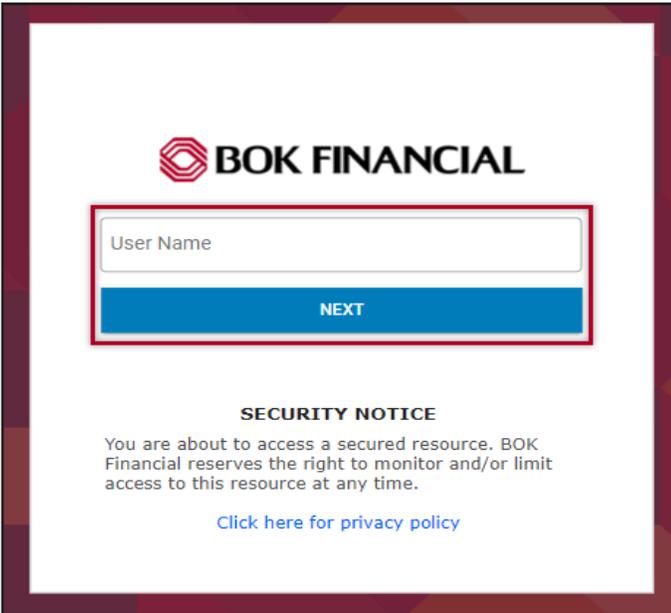
Each time you open https://mft.bokf.com going forward, you will receive this login prompt. Input your "User name" and click the blue "Next" button.

You will be directed to an Okta "Username" prompt. Enter your "Username", then click the blue "Next" button. This step may not appear each time you login.
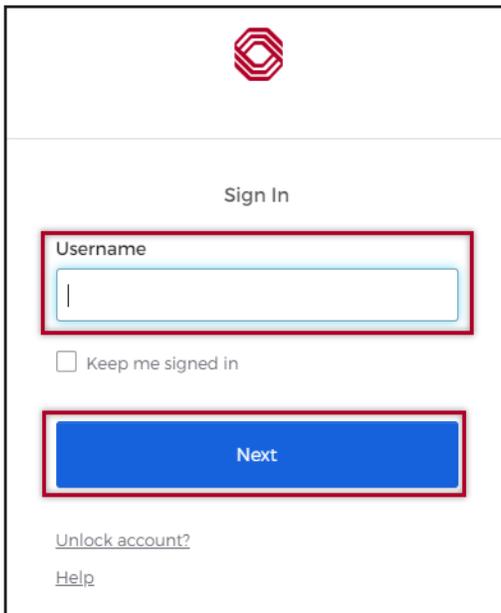
Key in your Okta "Password" followed by clicking the blue "Verify" button.
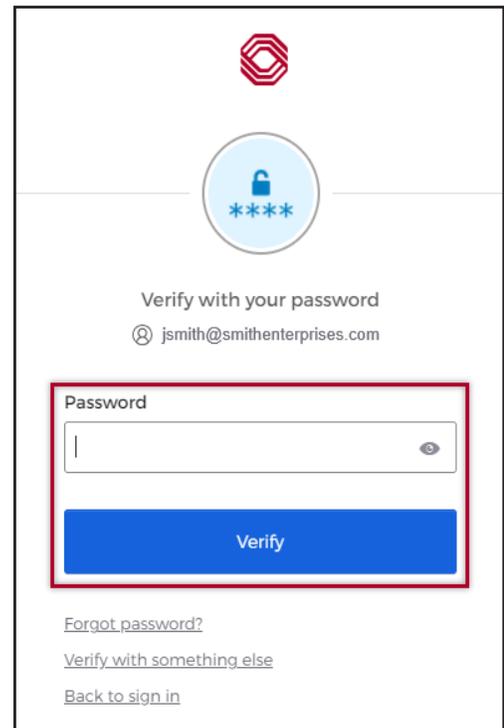
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Logging In

A prompt will display for your chosen authentication method. If you have elected multiple methods, the selection will be random but you can change to "Verify with something else" by clicking the link under the displayed security method.
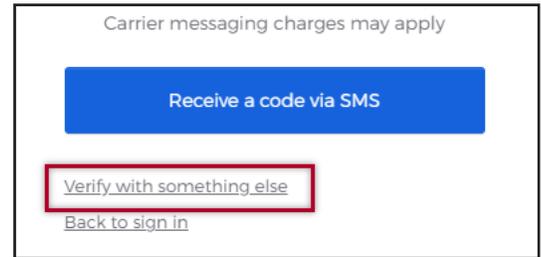
The list of elected security methods are displayed. Click "Select" next to the one you wish to authenticate with for this login.
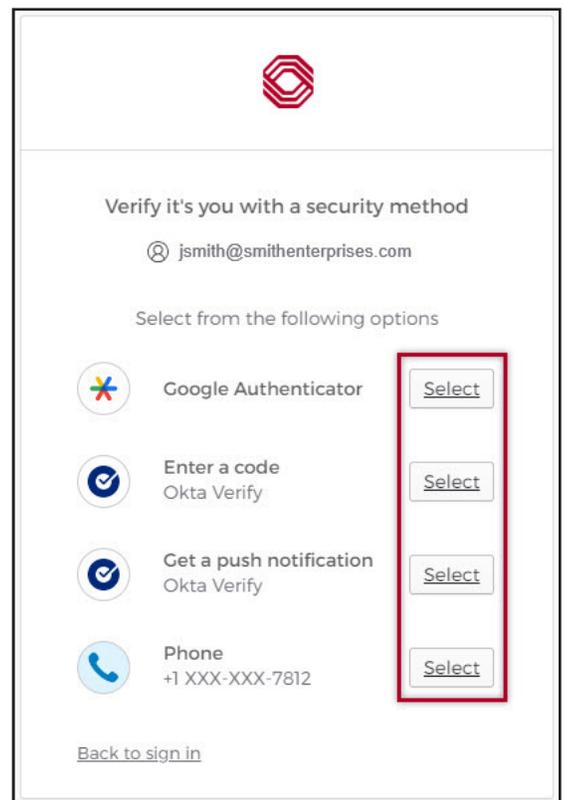
Logging In - Google Authenticator

Launch the Google Authenticator app on your mobile phone.
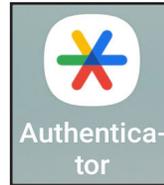
Key in the code currently displayed for MFT in Google Authenticator into the "Enter code" field and click the blue "Verify" button. Codes change every 60 seconds.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.

Logging In - Okta Verify Authentication

If "Okta Verify Enter a Code" is selected, launch the Okta Verify app on your mobile phone.

Okta Verify

Key in the code currently displayed for MFT in the Okta Verify app into the "Enter Code from Okta Verify app" field and click the blue"Verify" button. Codes change every 60 seconds.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.

Enter a code
jsmith@smithenterprises.com
Enter code from Okta Verify app
Verify
Verify with something else
Back to sign in
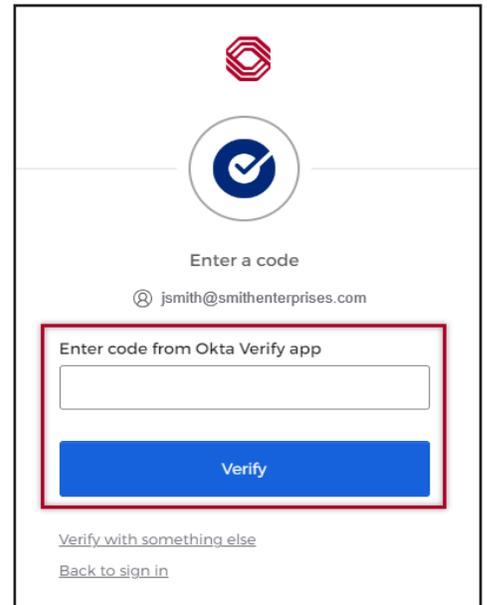
If "Okta Verify Push Notification" is selected, the below message will appear on screen and you will receive a message on your phone from Okta Verify confirming it is you.

Get a push notification
jsmith@smithenterprises.com
Push notification sent
☑ Send push automatically
Verify with something else
Back to sign in

okta
Did you just try to sign in?
M MFT – External Users – Test
📍 Near Texas, United States
    More info
💻 Windows 10
    UNRECOGNIZED DEVICE
🕐 2 minutes ago, 1:36 PM
🌐 https://bokfmfttst.oktapreview.com
Yes, it's me   No, it's not me
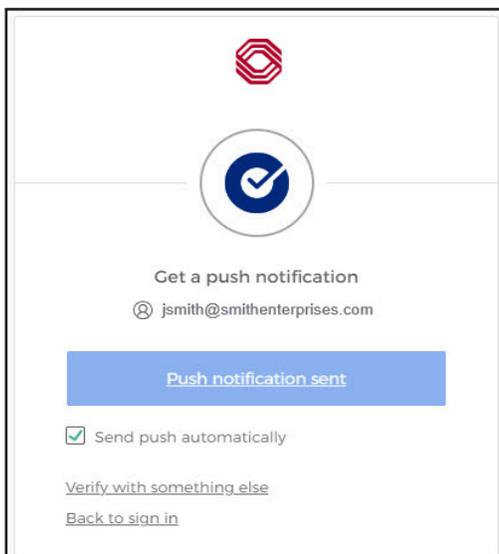
Select "Yes, it's me" on your phone. **Note:** If you ever receive a push notification and you are not trying to sign in, select "No it's not me", change your MFT password immediately and contact the Bank.

Once you have authenticated, you are then directed to the MFT landing page.

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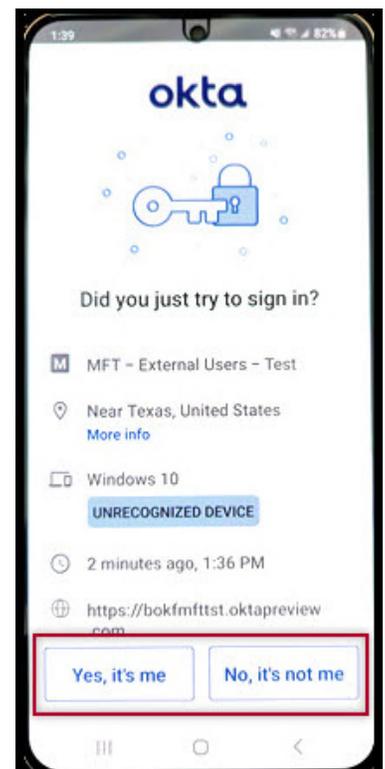
Logging In - Phone (SMS Text) Authentication
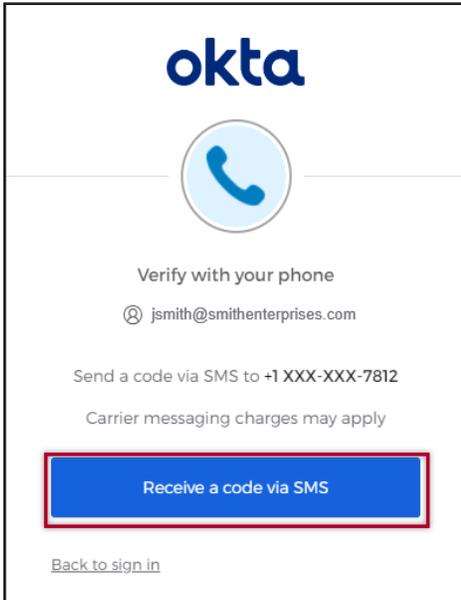
The phone "SMS" authentication prompt appears. Click the blue "Receive a code via SMS" button.

Key in the authentication code that you just received on your phone into the "Enter Code" field and click the blue "Verify" button.

You are then directed to the MFT landing page.

If you experience any issues while logging in, please consult the Technical Support section.
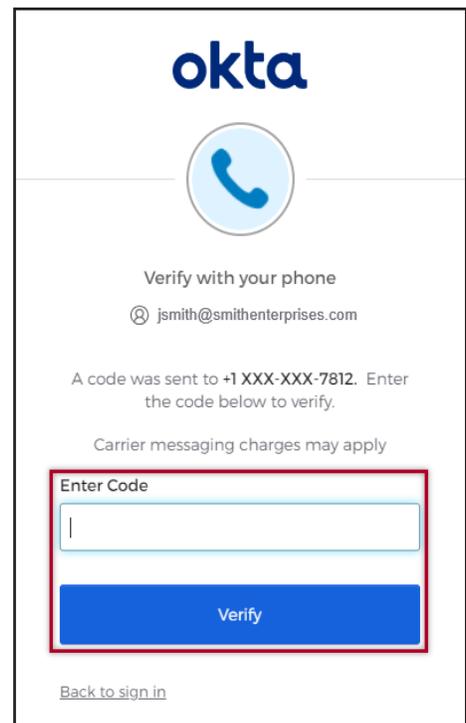
Technical Support

If you experience any issues or have questions about using the site, please reach out to your Client Services Professional. If your Client Services Professional is unavailable, please call 855-505-8600 to open a support case.

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