MFA Onboarding Template: Register and Log in with a Security Key

How to use this template:

* This template provides onboarding instructions for users who want to use a physical security key as an MFA verification method.
* This template assumes you’re turning on MFA for direct logins to your customer’s org. If you're using an SSO identity provider's MFA service instead, modify the content and screenshots to align with the details of that implementation (including the verification methods that the identity provider supports).
* Customize this template to match the customer’s MFA implementation.
  + As of the Summer ’23 Salesforce release, [the MFA registration experience can begin with either a list of all supported verification methods or with the Connect Salesforce Authenticator screen](https://help.salesforce.com/s/articleView?id=sf.security_optimize_verification_method_registration.htm). Pick the version of the template that’s appropriate for your customer’s org.
  + Review the comments for tips and guidance.
  + Edit any placeholders, which are noted with [brackets and red text], to include your customer’s details.
  + Include details about how users can acquire a security key.
  + Include your MFA rollout resources and instructions on how users can ask questions or get assistance.
* Decide how you want to distribute onboarding instructions to users. Options include saving this template as a PDF file and emailing it to users, hosting a PDF on an internal site, or generating an HTML page for online access.

Delete this text before sharing with users.

How to Register and Use a Security Key for Multi-Factor Authentication (MFA) Logins

|  |  |
| --- | --- |
| **Confirm that you meet the requirements to use a security key** | * Security key is compatible with the WebAuthn (FIDO2) or FIDO U2F standard |
| * Security key has a USB-A, USB-C, or Lightning connector |
| * Most major browsers support WebAuthn. For U2F keys, you must use Chrome, version 41 or later; other browsers aren’t supported. |

**Register a security key**

To use a physical security key as a verification method for MFA logins, register it to connect it to your account. You can register a key at any time, even before MFA is turned on.

To register a security key the first time you log in after MFA is turned on, follow these onscreen instructions.

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Icon  Description automatically generated | **2**  Graphical user interface, application  Description automatically generated | **3** | **4**  Graphical user interface, application, Teams  Description automatically generated |
| If you haven’t received your security key yet, contact [contact information] for help. | In a supported browser, log in to your account. You may be prompted to verify your identity with a one-time passcode via email or text message. | Select **Use a Universal Second Factor (U2F) or WebAuthn (FIDO2) key**. | The Register a Security Key screen displays. Connect the security key to your computer. If prompted by your browser, press the button on the key. |

|  |  |  |  |
| --- | --- | --- | --- |
| **5**  Graphical user interface, application, Teams  Description automatically generated | **6**  A picture containing text, monitor, electronics, computer  Description automatically generated |  |  |
| When the security key is registered, click **Continue**. | And that’s it! You’ve successfully connected your security key to your account, and you finish logging in. |  |  |

To register a security key from your personal settings in your account:

1. From a supported browser, log in to your account, then go to your personal settings.
2. Enter Advanced User Details in the Quick Find box, then select **Advanced User Details**.
3. In the Security Key (U2F or WebAuthn) field, click **Register**.
4. For security purposes, you may be prompted to log in to your account or verify your identity by receiving a one-time passcode via email or test message.
5. Complete steps 4 through 6 in the above table.

**Log in with a security key**

To use a security key to verify your identity for MFA logins:

|  |  |  |  |
| --- | --- | --- | --- |
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| In a supported browser, go to the login screen and enter your username and password, as usual. | You’re prompted to insert your security key. | Connect the security key to your computer. If prompted by your browser, press the button on the security key. | You’re successfully logged in to your account. |

**How to get help**

* [Add links to your company’s MFA rollout resources.]
* [Add contact information where users can ask questions and get help.]

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| If you haven’t received your security key yet, contact [contact information] for help. | In a supported browser, log in to your account. You may be prompted to verify your identity with a one-time passcode via email or text message. | The Connect Salesforce Authenticator screen displays by default. Click **Choose Another Verification Method**. | Select **Use a Universal Second Factor (U2F) or WebAuthn (FIDO2) Key**. |

|  |  |  |  |
| --- | --- | --- | --- |
| **5**  Graphical user interface, application, Teams  Description automatically generated | **6**  Graphical user interface, application, Teams  Description automatically generated | **7**  A picture containing text, monitor, electronics, computer  Description automatically generated |  |
| The Register a Security Key screen displays. Connect the security key to your computer. If prompted by your browser, press the button on the key. | When the security key is registered, click **Continue**. | And that’s it! You’ve successfully connected your security key to your account, and you finish logging in. |  |

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