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 directly in your Salesforce products. Customize this template to match your Salesforce product and your MFA implementation.
  + The onboarding steps are a little different for [products built on the Salesforce Platform](#register_security_key_platform_products) versus [other Salesforce products](#register_security_key_other_products). To determine if your product is built on the Salesforce Platform, see [Products That Support Multi-Factor Authentication](https://help.salesforce.com/articleView?id=sf.mfa_supported_products.htm) in Salesforce Help.
  + Review the comments to Admins for tips and guidance.
  + Edit any placeholders, which are noted with [brackets and red text], to include your company’s details.
  + Include details about how you’re distributing security keys to users.
  + Include your MFA rollout resources, and instructions on how your users can ask questions or get assistance.
* If you're using your SSO identity provider's MFA services instead, modify the content and screenshots to align with the details of that implementation (including the verification methods that your identity provider supports).
* Decide how you want to distribute onboarding instructions to your 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 your 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 FIDO U2F standard |
| * Security key has a USB-A, USB-C, or Lightning connector |
| * You must use Chrome, version 41 or later, to log in to Salesforce. 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 Salesforce 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**  Graphical user interface, text  Description automatically generated | **4**  Graphical user interface, application  Description automatically generated |
| If you haven’t received your security key yet, contact [contact information] for help. | In a supported browser, log in to Salesforce. 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) 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 Salesforce account, and you finish logging in. |  |

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

1. Log in to Salesforce, 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) 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 5 through 7 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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| --- | --- | --- | --- |
| **1**  Graphical user interface, application  Description automatically generated | **2**  Graphical user interface, application, Teams  Description automatically generated | **3**  Icon  Description automatically generated | **4**  A picture containing text, monitor, electronics, computer  Description automatically generated |
| In a supported browser, go to the Salesforce login screen and enter your username and password, as usual. | Salesforce prompts you 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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| **Confirm that you meet the requirements to use a security key** | * Security key is compatible with the FIDO U2F standard |
| * Security key has a USB-A, USB-C, or Lightning connector |
| * You must use Chrome, version 41 or later, to log in to Salesforce. 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 [Salesforce product] account.

When you log in for the first time after MFA has been turned on, follow these onscreen instructions.

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Icon  Description automatically generated | **2**  Graphical user interface, application  Description automatically generated | **3**  Graphical user interface, application  Description automatically generated | **4**  Graphical user interface, text, 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 [Salesforce product] account. You may be prompted to verify your identity with a one-time passcode via email or text message. | Select **Security Key** from the list of verification methods. | Connect the security key to your computer, then click **Register**. |

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| --- | --- | --- | --- |
| **5**  Graphical user interface, application, Teams  Description automatically generated | **6**  Graphical user interface, application  Description automatically generated | **7**  A picture containing text, monitor, electronics, computer  Description automatically generated |  |
| When prompted by the browser, press the button on the security key. | Assign a name to your security key so it’s easy to recognize, then click **Done**. | And that’s it! You’ve successfully connected your security key to your [Salesforce product] account, and you finish logging in. |  |

**Log in with a security key**

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

|  |  |  |  |
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| **1**  Graphical user interface, application  Description automatically generated | **2**  Graphical user interface, application  Description automatically generated | **3**  Graphical user interface, application  Description automatically generated | **4**  A picture containing text, monitor, electronics, computer  Description automatically generated |
| In a supported browser, go to the login screen for your [Salesforce product], and enter your username and password, as usual. | Connect the security key that you registered for your account to your computer, then click **Verify**. | When prompted by the 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.]