MFA Onboarding Template: Register and Log in with Salesforce Authenticator

How to use this template:

* This template provides onboarding instructions for users who want to use the Salesforce Authenticator mobile app 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 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 Salesforce Authenticator for Multi-Factor Authentication (MFA) Logins

**Register Salesforce Authenticator**

To use Salesforce Authenticator as a verification method for MFA logins, register the app to connect it to your account. You can register the app at any time, even before MFA is turned on.

To register Salesforce Authenticator the first time you log in after MFA is turned on, follow these onscreen instructions.

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  A screenshot of a cell phone  Description automatically generated with medium confidence | **2**  Graphical user interface, application  Description automatically generated | **3** | **4** |
| Install Salesforce Authenticator on your mobile device. It’s available from the Apple App Store or Google Play. | On your computer, 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 the Salesforce Authenticator mobile app**. | The Connect Salesforce Authenticator screen displays. |

|  |  |  |  |
| --- | --- | --- | --- |
| **5**  Icon  Description automatically generatedGraphical user interface, text, application  Description automatically generated | **6**  A close - up of a cell phone  Description automatically generated with medium confidence | **7** | **8**  A picture containing text, monitor, electronics, computer  Description automatically generatedGraphical user interface, application, Teams  Description automatically generated |
| On your mobile device, open Salesforce Authenticator and tap **Add an Account**. | The app displays a two-word phrase. | On your computer, enter the phrase in the Two-Word phrase field. Then click **Connect**. | In Salesforce Authenticator, verify the connection details, then tap **Connect**. And that’s it! You finish logging in. |

To register Salesforce Authenticator from your personal settings in your account:

1. Download and install the Salesforce Authenticator app on your mobile device. The app is available from the Apple App Store or Google Play.
2. Log in to your account, then go to your personal settings.
3. Enter Advanced User Details in the Quick Find box, then select **Advanced User Details**.
4. In the App Registration: Salesforce Authenticator field, click **Connect**.
5. 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.
6. Complete steps 4 through 8 in the above table.

**Log in with Salesforce Authenticator**

To use Salesforce Authenticator to verify your identity for MFA logins:

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| --- | --- | --- | --- |
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| On the login screen, enter your username and password, as usual. | You’re prompted to use Salesforce Authenticator to verify your identity. | On your mobile device, respond to the push notification to open Salesforce Authenticator. | In Salesforce Authenticator, verify that the login request is from you, then tap **Approve**. 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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| Install Salesforce Authenticator on your mobile device. It’s available from the Apple App Store or Google Play. | On your computer, log in to your account. You may be prompted to verify your identity with a one-time passcode via email or text message. | The screen to register Salesforce Authenticator displays automatically. | On your mobile device, open Salesforce Authenticator and tap **Add an Account**. |

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| The app displays a two-word phrase. | On your computer, enter the phrase in the Two-Word phrase field. Then click **Connect**. | Salesforce Authenticator is connected to your account. Confirm the connection details in the app. | In Salesforce Authenticator, verify the connection details, then tap **Connect**. And that’s it! You finish logging in. |

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