MFA Onboarding Template: Register and Log in with a Built-In Authenticator

How to use this template:

* This template provides onboarding instructions for users who want to use a built-in authenticator, such as Windows Hello, Touch ID or Face ID, as an MFA verification method. (For products built on the Salesforce Platform, an admin must enable this option before its available to users.)
* Built-in authenticators are supported by these Salesforce products only:
  + Products built on the Salesforce Platform
  + Heroku
  + Marketing Cloud Intelligence
  + MuleSoft Anypoint Platform
  + Tableau Cloud
* This template assumes you’re using the free MFA functionality provided by Salesforce for direct logins to your Salesforce products. 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 your Salesforce products and your MFA implementation.
  + The onboarding steps are a little different for [products built on the Salesforce Platform](#register_sfa_platform_products) versus [other Salesforce products](#register_sfa_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.
    - For products built on the Salesforce Platform: [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 Salesforce org.
  + Review the comments for tips and guidance.
  + Edit any placeholders, which are noted with [brackets and red text], to include your company’s details.
  + Include your MFA help resources and instructions on how your users can ask questions or get assistance.
* 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 users.

How to Register and Use a Built-In Authenticator for Multi-Factor Authentication (MFA) Logins

|  |  |
| --- | --- |
| **Confirm that you meet the requirements to use a built-in authenticator** | * Your computer/mobile device, operating system, and browser support the Web Authentication ([FIDO2 WebAuthn](https://fidoalliance.org/fido2/fido2-web-authentication-webauthn/)) standard. |
| * Your built-in authenticator service, such as Windows Hello, Touch ID, or Face ID, is enabled and configured to verify your identity via a biometric like a fingerprint or facial recognition scan, or a PIN. |

**Register a built-in authenticator**

To use a built-in authenticator as a verification method for MFA logins, go through the registration process to connect it to your account.

**Tip**: A built-in authenticator is tied to your device. If you log in from multiple computers (for example, a desktop workstation and a laptop), you either need to register a built-in authenticator on each device or register a second type of verification method that you can use on devices where you don’t have a built-in authenticator.

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

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Graphical user interface, application  Description automatically generated | **2** | **3**  Graphical user interface, text, application, chat or text message, website  Description automatically generated | **4**  Graphical user interface, application, Teams  Description automatically generated |
| 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 built-in authenticator on your device** from the list of verification methods. | Click **Register**. | When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. |

|  |  |  |  |
| --- | --- | --- | --- |
| **5**  Graphical user interface, application, Teams  Description automatically generated | **6**  A picture containing text, monitor, electronics, computer  Description automatically generated |  |  |
| Assign a name to your built-in authenticator so it’s easy to recognize, then click **Done**. | And that’s it! You’ve successfully connected your built-in authenticator to your account, and you finish logging in to your account. |  |  |

To register a built-in authenticator from personal settings in your account:

1. In 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 Built-in Authenticators section, click **Add**.
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 3 through 6 in the above table.

**Log in with a built-in authenticator**

To use a built-in authenticator to verify your identity for MFA logins:

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Graphical user interface, application  Description automatically generated | **2**  Graphical user interface, text, application  Description automatically generated | **3**  Graphical user interface, text, application  Description automatically generated | **4**  A picture containing text, monitor, electronics, computer  Description automatically generated |
| In a supported browser, on the login screen, enter your username and password, as usual. | When you see the Verify Your Identity screen, click **Verify**. | When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. | You’re successfully logged in to your account. |

**How to Get Help**

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

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| * Your built-in authenticator service, such as Windows Hello, Touch ID, or Face ID, is enabled and configured to verify your identity via a biometric like a fingerprint or facial recognition scan, or a PIN. |

**Register a built-in authenticator**

To use a built-in authenticator as a verification method for MFA logins, go through the registration process to connect it to your account.

**Tip**: A built-in authenticator is tied to your device. If you log in from multiple computers (for example, a desktop workstation and a laptop), you either need to register a built-in authenticator on each device or register a second type of verification method that you can use on devices where you don’t have a built-in authenticator.

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|  |  |  |  |
| --- | --- | --- | --- |
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| 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 built-in authenticator on your device** from the list of verification methods. | Click **Register**. |

|  |  |  |  |
| --- | --- | --- | --- |
| **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 |  |
| When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. | Assign a name to your built-in authenticator so it’s easy to recognize, then click **Done**. | And that’s it! You’ve successfully connected your built-in authenticator to your account, and you finish logging in to your account. |  |

To register a built-in authenticator from personal settings in your account:

1. In 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 Built-in Authenticators section, click **Add**.
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 7 in the above table.

**Log in with a built-in authenticator**

To use a built-in authenticator to verify your identity for MFA logins:

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Graphical user interface, application  Description automatically generated | **2**  Graphical user interface, text, application  Description automatically generated | **3**  Graphical user interface, text, application  Description automatically generated | **4**  A picture containing text, monitor, electronics, computer  Description automatically generated |
| In a supported browser, on the login screen, enter your username and password, as usual. | When you see the Verify Your Identity screen, click **Verify**. | When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. | You’re successfully logged in to your account. |

**How to Get Help**

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

How to Register and Use a Built-In Authenticator for Multi-Factor Authentication (MFA) Logins

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| * Your built-in authenticator service, such as Windows Hello, Touch ID, or Face ID, is enabled and configured to verify your identity via a biometric like a fingerprint or facial recognition scan, or a PIN. |

**Register a built-in authenticator**

To use a built-in authenticator as a verification method for MFA logins, go through the registration process to connect it to your [Salesforce product] account.

**Tip**: A built-in authenticator is tied to your device. If you log in from multiple computers (for example, a desktop workstation and a laptop), you either need to register a built-in authenticator on each device or register a second type of verification method that you can use on devices where you don’t have a built-in authenticator.

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

|  |  |  |  |
| --- | --- | --- | --- |
| **1**  Graphical user interface, application  Description automatically generated | **2**  A screenshot of a phone  Description automatically generated with low confidence | **3**  Graphical user interface, text, application, chat or text message, website  Description automatically generated | **4**  Graphical user interface, application, Teams  Description automatically generated |
| 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 **Built-In Authenticator** from the list of verification methods. | Click **Register**. | When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. |

|  |  |  |  |
| --- | --- | --- | --- |
| **5**  Graphical user interface, application, Teams  Description automatically generated | **6**  A picture containing text, monitor, electronics, computer  Description automatically generated |  |  |
| Assign a name to your built-in authenticator so it’s easy to recognize, then click **Done**. | And that’s it! You’ve successfully connected your built-in authenticator to your Salesforce account, and you finish logging in to your account. |  |  |

**Log in with a built-in authenticator**

To use a built-in authenticator to verify your identity for MFA logins:

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| --- | --- | --- | --- |
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| In a supported browser, go to the login screen for your [Salesforce product], and enter your username and password, as usual. | When you see the Verify Your Identity screen, click **Verify**. | When prompted by your browser, provide the identifier that you previously set up with your built-in authenticator, such as your fingerprint, facial scan, PIN, or password. | You’re successfully logged in to your account. |

**How to Get Help**

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