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. (For products built on the Salesforce Platform, an admin must enable this option before its available to users.)
* 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 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.
    - 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 details about how users can acquire a security key.
  + 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 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 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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| --- | --- | --- | --- |
| **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 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 help resources.]
* [Add contact information where users can ask questions and get help.]

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**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**  Graphical user interface, text  Description automatically generated | **4** |
| 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**. |

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| **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. |  |

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 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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| 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 help resources.]
* [Add contact information where users can ask questions and get help.]

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

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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.

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| --- | --- | --- | --- |
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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 [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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| 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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| 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 help resources.]
* [Add contact information where users can ask questions and get help.]