



# **Salesforce Multi-Factor Authentication (MFA)**

*User Configuration and Login Guide Login*

*January 25, 2023*

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## Multi-factor Authentication Overview

Unfortunately we live in a world where “bad” actors are constantly looking to gain access to critical personal and organizational data. By now our personal lives, almost all of us have experienced and felt the pain associated with a data breach or compromise from a company we work with and trust. There is a continuous tug-of-war between companies and hackers who are trying to break through the security walls.

We, in the financial services, have an especially large target on our back from the hacking community.

We have to stay in front the “bad” people and ensure we continuously monitor and stay in front of new threats to our clients’ data and information.

One of the most successful counter balances to these threats is to use “Authentication,” “Multi-Factor Authentication” or “MFA.” Essentially, MFA requires two forms of verification before a user is allowed to login to an application. Many of us already have experience MFA when logging into our online/mobile bank applications, Government websites and even fantasy football sites.

Likewise, Salesforce has mandated for all organizations that MFA must be implemented in Q1 of this year. Our window dictated by Salesforce is to be install by February 11<sup>th</sup>.

Below is an overview of the two-step process that must be completed by any user that needs to log into Salesforce.

- 1) Initial Setup and Configuration of the Salesforce MFA solution by each user.
- 2) How to login to Salesforce once the MFA solution has been configured.

Enjoy the ride!!!

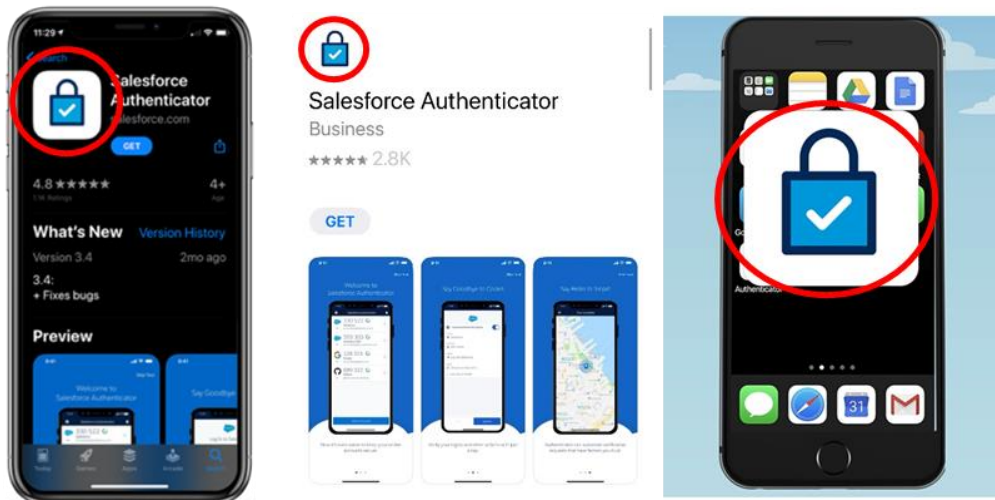
## Setup and Configuration of Salesforce Multi-factor Authentication solution

For a video with additional information on why Multi-factor Authentication is being implemented, please see the attached video. [How to Use Salesforce Authenticator for MFA Logins \(For Lightning Experience and Salesforce Classic\) \(vidyard.com\)](#)

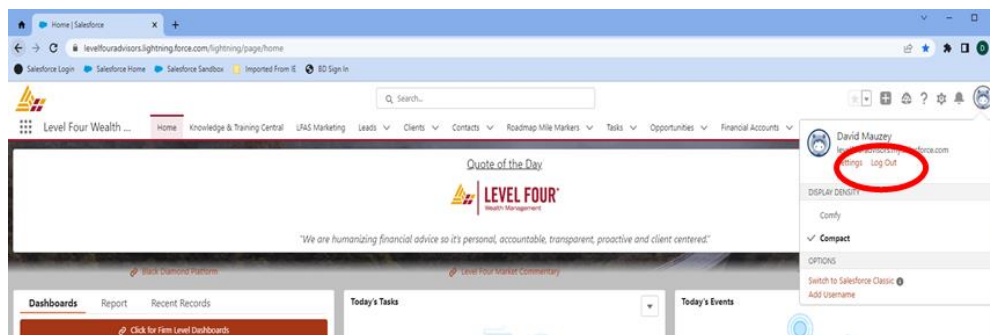
**IMPORTANT:** To begin the configuration process, you will need to know your Salesforce userid and password. You will not be able to use any of your “Saved” userid and password login information. If you do not know your Userid and Password, the Salesforce administration team will need to assist with the password reset process.

1. Install the Salesforce Authenticator App on your mobile device via the App Store (Apple) or Google Play (Andriod). Type in “Salesforce Authenticator” and hit search.

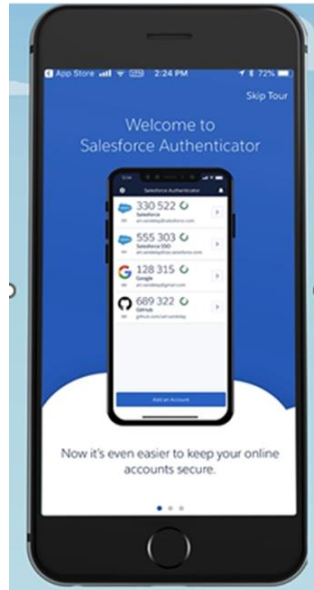
**IMPORTANT:** Be very selective in the application that you are selecting in App Store or Play. Look for the application icon that have the “Lock with the Check Mark” (See RED circled icons in the below screen shots). I noticed several applications will pop up that look similar and even have will use the word “Salesforce” in the description but are not the official Salesforce Authenticator.



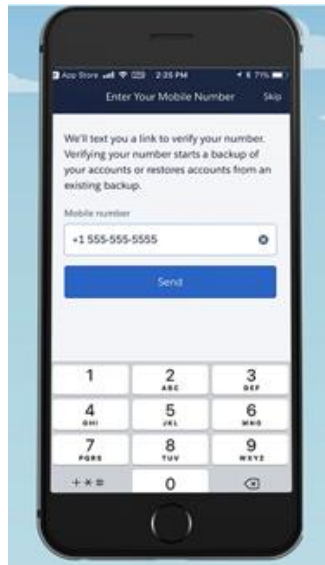
2. Log out of Salesforce completely and close all current browsers (Chrome or Edge).



3. Go back to your mobile device and open Salesforce Authenticator. The Salesforce Authentication app will first take you on a brief tour of the application before you start the initial connectivity process.



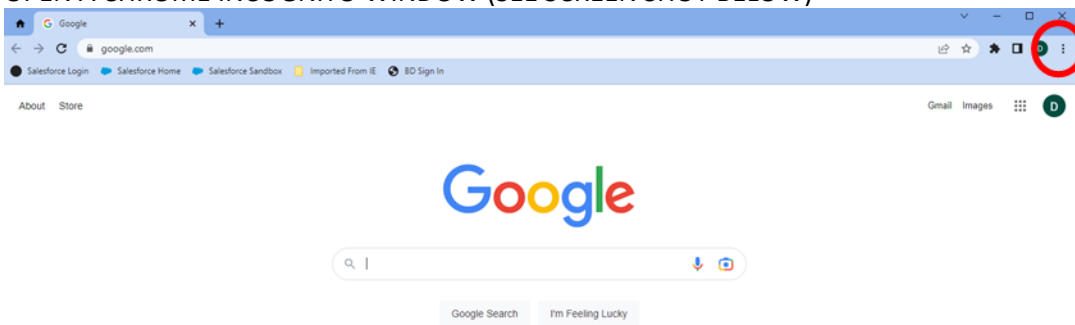
4. Once you open Salesforce Authenticator, you will need to enter the secondary device (ie mobile/cell phone) that will be used to authenticate. Enter your phone number.



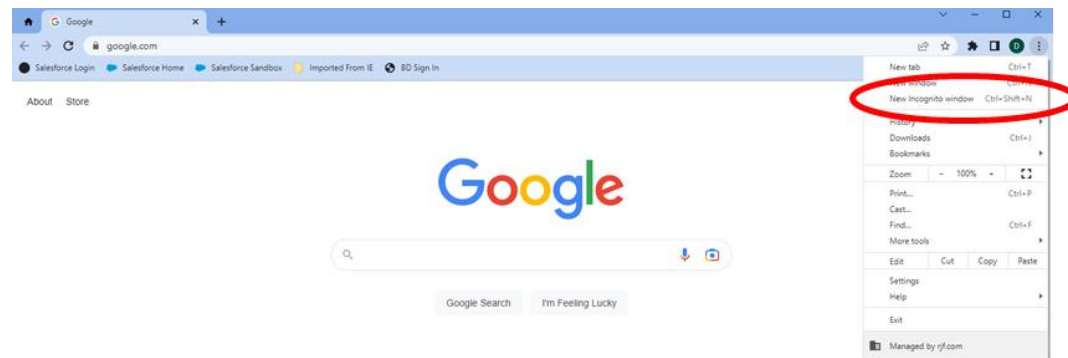
5. A text will be delivered to your mobile device with a link to complete setup of the MFA authentication for your userid.
6. Open the Salesforce authenticator application and enter the code.  
**IMPORTANT:** The code you enter should be retained for future use. This code can be used to help you restore the user credentials if something goes wrong and a mobile device is lost or is replaced.



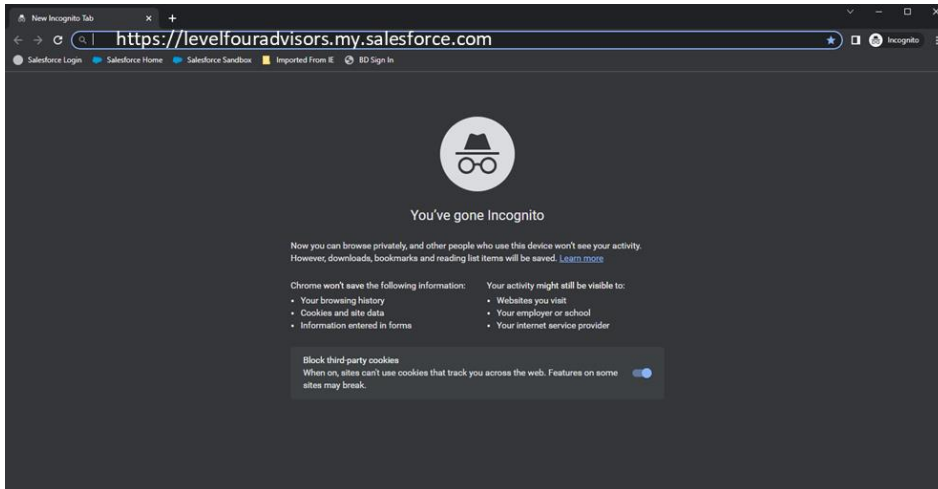
7. OPEN A CHROME INCOGNITO WINDOW (SEE SCREEN SHOT BELOW)



8. In the dropdown menu, select "New Incognito Window."

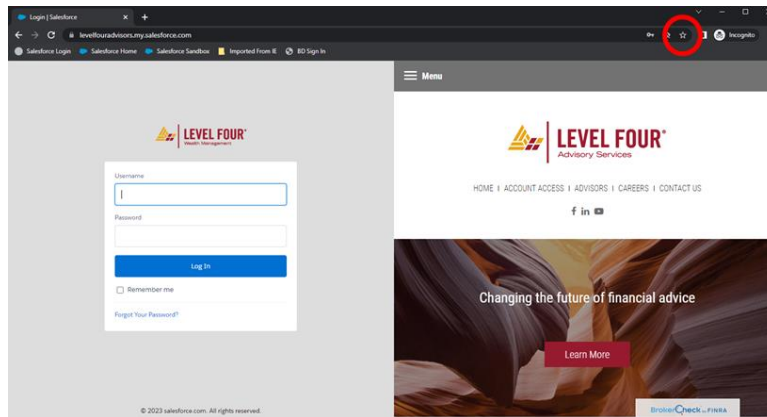


9. IN THE INCOGNITO WINDOW, type in: <https://levelfouradvisors.my.salesforce.com>

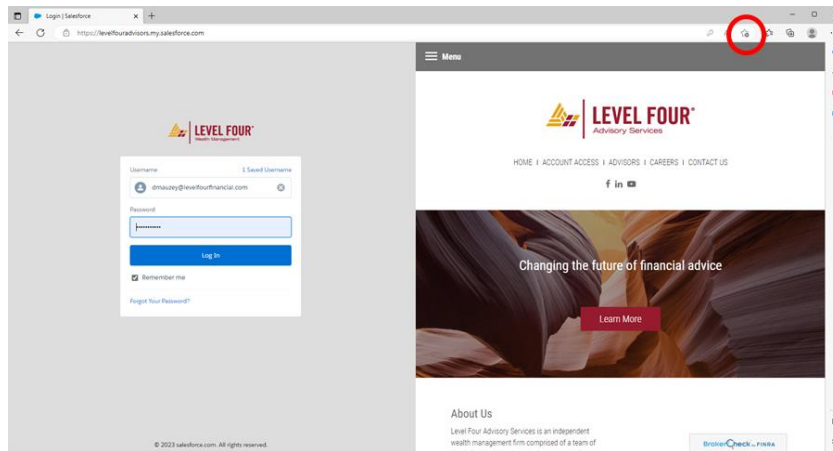


10. Save this Bookmark URL as a favorite in Chrome or your Microsoft Edge.

*Chrome:*



*Microsoft Edge:*

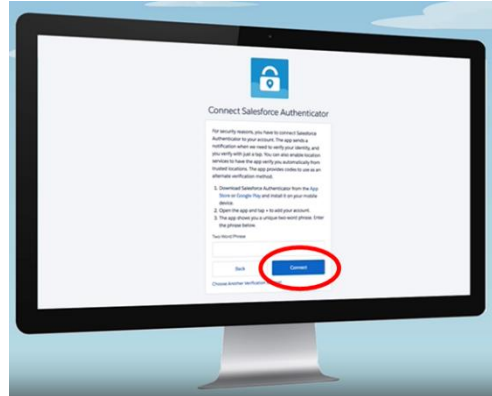


11. Log-On to Salesforce: Enter your Salesforce Userid and Password

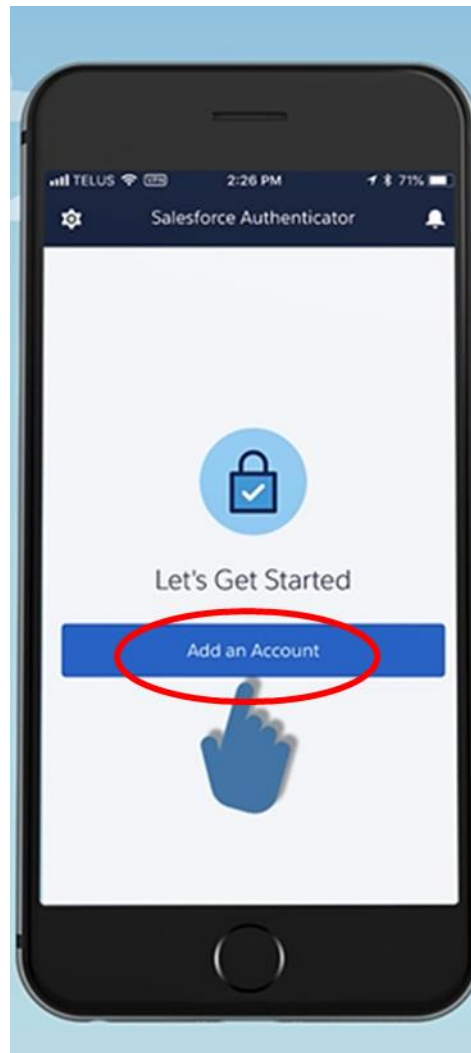
12. You will be prompted to enter a 6-digit code that has been sent to your mobile device via text or to your Outlook email if you choose to authenticate through your email. In the browser window, you will see a message that a code has been texted or email to you.

NOTE: Some users will go directly to “Add Account”. This occurs, go directly to Step 14.

13. From your browser, enter the code texted or emailed to you and select “Connect”.

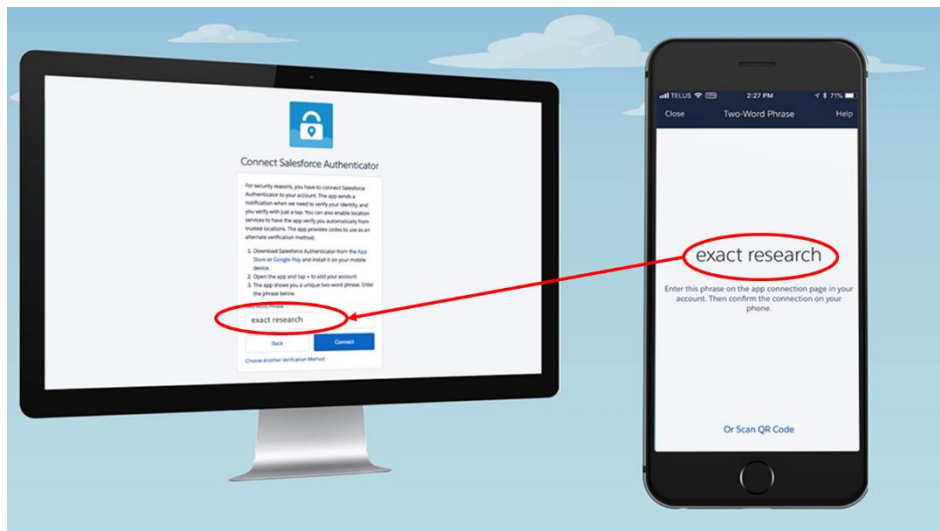


14. Now go back to the Salesforce Authenticator application on your mobile device and select “Add an Account”.

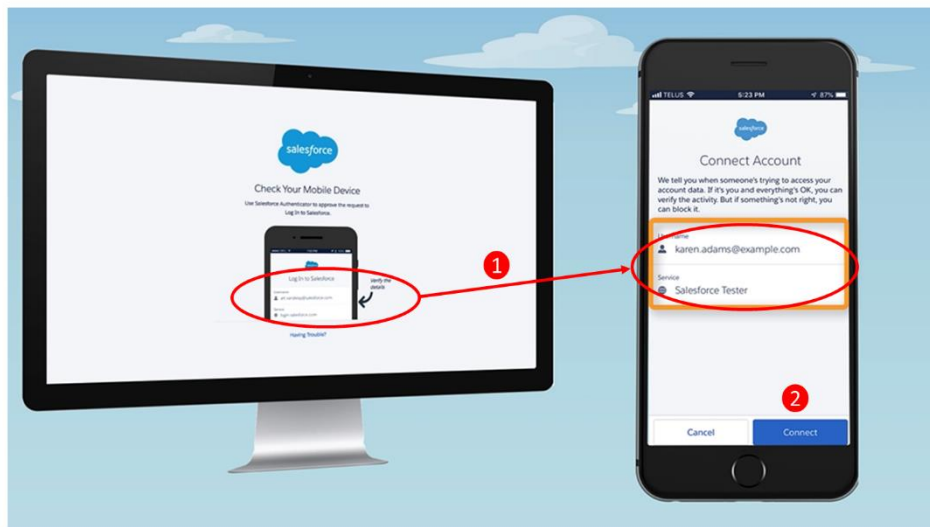




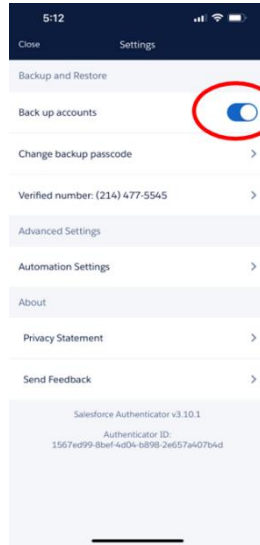
15. On your mobile device, you will receive a 2-word pass phrase which should be entered into the browser under the column “Two-Word Phrase”.



16. On your browser, you will be asked to confirm you userid information. Review (1) and hit “Connect” (2) if the user information aligns to your email.



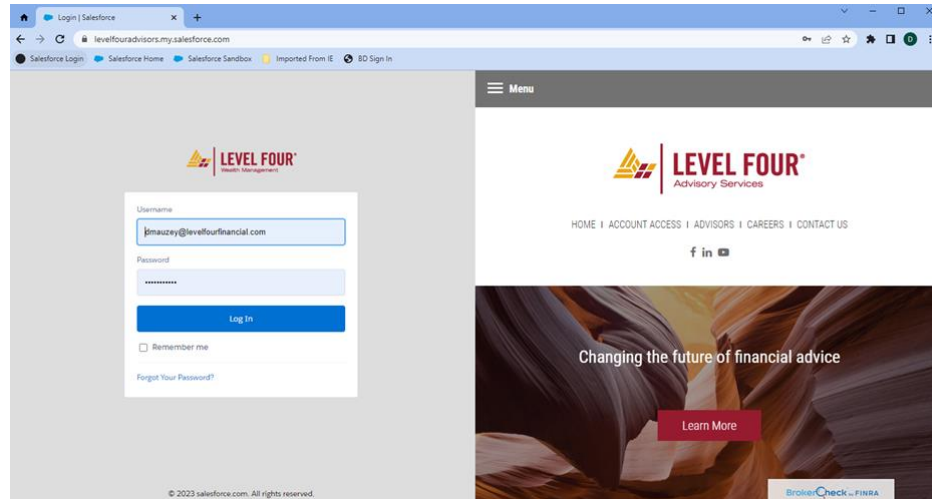
17. On your mobile device, Set backup to “On” to ensure if device is lost or replaced you will be able to retain your Salesforce MFA user credentials.



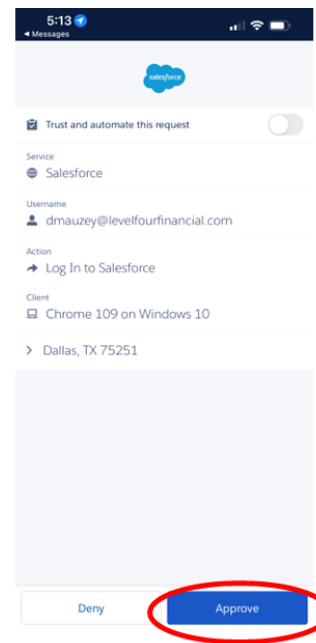
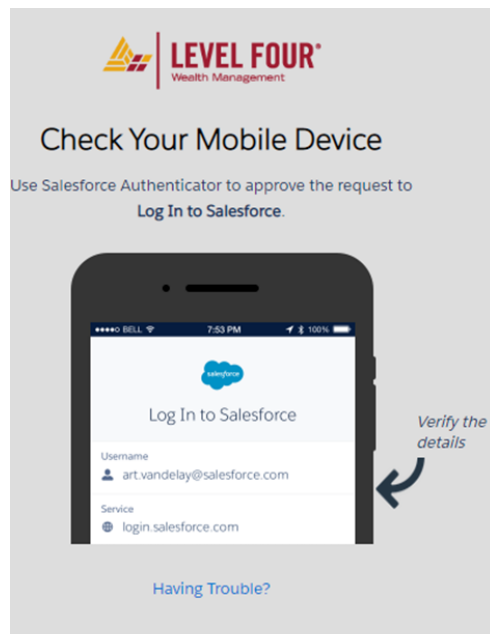
18. This completes the initial set up and configuration of the Salesforce Multi-Factor Authentication (MFA) module!!!

## How to login to Salesforce once MFA is configured.

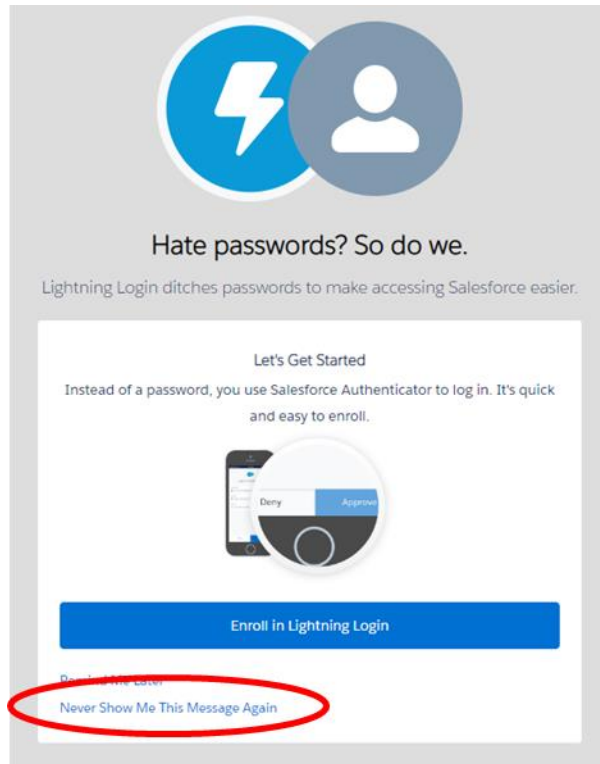
1. Open your browser (Chrome or Microsoft Edge) and either select from your “Favorites” or enter the Level Four URL: <https://levelfouradvisors.my.salesforce.com>.



2. Type in your userid and password.
3. Salesforce will send a request for “Approval” to your mobile device.



4. CRITICAL: Salesforce will ask you if you want to “Enroll in Lightning Login.” Decline by selecting the “Never show me this message again.”



5. Congrats! You will then be routed to the Salesforce homepage.

