

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

salesforce

Experience Cloud : Show Me How

Learn about Experience Cloud's out-of-the-box features, best practices and tips & tricks.

August 19, 2021





Topics

Campaign Marketplace
Multi-Factor Authentication

Today's Session

A Few Logistics

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Sit Back and Watch

- Don't try to follow along

Ask Questions in the Q&A panel

- We will do our best to answer as many questions live as possible
- We will answer all questions in the chat

Recording will be Emailed the Next Day

- Watch all past recordings:
www.learnexperiencecloud.com/s/topic/0TO1U000000UGfSWAW/show-me-how

Please Fill Out the Survey at the End



Today's Speakers



John Kim
Success Guide



Parker George
Success Guide



Forward-Looking Statement



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This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, the one-time accounting non-cash charge that was incurred in connection with the Salesforce.org combination; stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth and sustainability goals. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the company's results could differ materially from the results expressed or implied by the forward-looking statements we make.

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THANK YOU





Campaign Marketplace

Create and share marketing campaigns, guidelines, and assets with partners

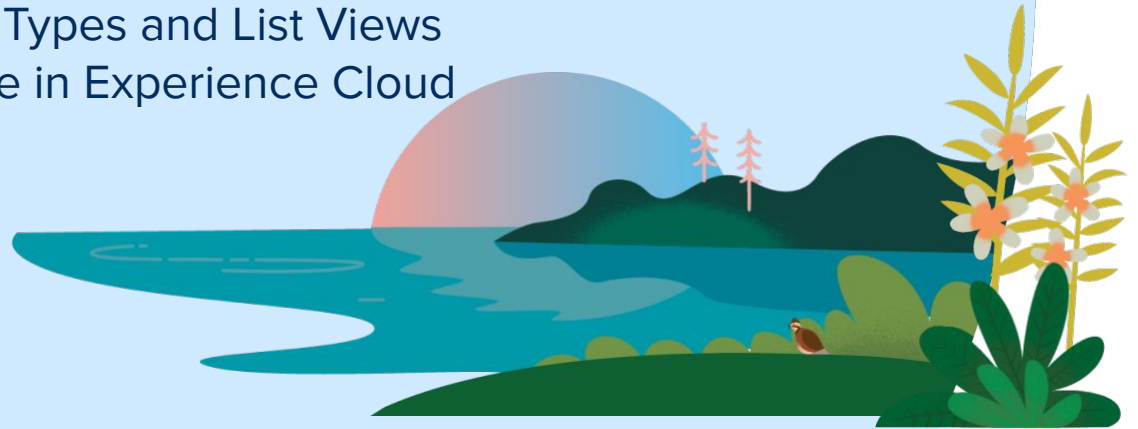




Agenda

Campaign Marketplace

- What is a Campaign?
- What is a Campaign Marketplace?
- Page Layouts, Record Types and List Views
- Campaign Marketplace in Experience Cloud
- Resources
- Q&A



A stylized illustration of a forest landscape. Two large, dark brown trees with thick trunks and dense green foliage frame the top and sides of the image. In the background, there are rolling green hills and several tall, thin evergreen trees. The sky is a light, hazy blue. In the bottom right corner, there are some smaller green plants and yellow flowers. A small red and white bird is perched on a branch of the tree on the left.

What is a Campaign? What is a Campaign Marketplace?

What is a Campaign?

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Marketers use campaigns to analyze how many leads they're generating, how much pipeline they're building, and how many deals they're closing as a result of marketing efforts.

Campaign
Regional Field Marketing

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Type	Status	Start Date	End Date	Campaign Effectiveness	Active
Event	In Progress	5/2/2021	8/31/2021	zero	<input checked="" type="checkbox"/>

Details [Related](#)

Campaign Name
Regional Field Marketing

Description
Focused, regional events for targeted accounts and opportunities. Includes dinners, networking events, golf outings and professional sports games.

Details

Parent Campaign Regional Field Marketing	Campaign Owner Parker George
Type Event	Start Date 5/2/2021
Status In Progress	End Date 8/31/2021
	Active <input checked="" type="checkbox"/>

Planning

Leads in Campaign 0	Budgeted Cost in Campaign \$36,000
Contacts in Campaign 0	Expected Revenue in Campaign \$50,000

What is a Campaign Marketplace?

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Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. They can also customize the look and feel of the marketplace and highlight information that is important to partners. **Partners can then choose which campaigns work best for them.**

The screenshot displays the Pacifica Campaign Marketplace interface. At the top, there is a search bar and navigation tabs for Home, Sales, Marketing, Resources, and MDF & Co-Op. The main content area is titled "Campaign Marketplace" and "All Campaigns". It features six campaign cards arranged in a 2x3 grid:

- EMAIL:** Pacifica Enterprise Solutions Product Launch. Announce the latest Pacifica Enterprise solutions to your enterprise customers. This email campaign invites customers to tune into live product announcements taking place on November 6th.
- OTHER:** Gate Industry Content. Share proprietary articles, reports, and other content on your company blog or social networks. Gate this content with a sign-up form to generate leads.
- SEMINAR / CONFERENCE:** West Coast Solutions Summit. Invite prospects to join you at the Pacifica Solutions Summit in San Jose, California, taking place on March 13, 2018.
- OTHER:** Social Media Brand Awareness. Build brand awareness on social networks like Twitter, LinkedIn, and more.
- ADVERTISEMENT:** Product Guide Mailer. Send out your products guides to target companies. Market development funds and Co-op funds are available to help cover printing and mailing costs and product guide templates are provided to get you started.
- SEMINAR / CONFERENCE:** Southwest InfoTech 2018. Host a booth and meet potential customers at Southwest InfoTech 2018 in San Antonio, Texas. Market development funds are available to help cover travel and material costs.

A stylized illustration of a forest landscape. Two large, dark brown trees with green foliage frame the top and sides of the image. In the background, there are rolling green hills and several green pine trees. The sky is a light blue gradient. The overall style is clean and modern.

Page Layouts, Record Types and List Views

[Example] Steps to Prepare a Campaign Marketplace

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1. Go to Customize | Campaigns | Page Layouts.
2. **Create 2 page layouts:** one for the channel marketer and one for the partner profiles in your partner site.
3. Go to Customize | Campaigns | Record Types and **create a record type** called Channel Marketing.
4. Go to Campaigns | Create New View and **create a campaign list view** called Campaign Marketplace.
5. Create campaigns for your partner users using the Channel Marketing record type.

SETUP > OBJECT MANAGER

Campaign

Page Layouts	
4 Items, Sorted by Page Layout Name	
PAGE LAYOUT NAME	CREATED BY
Campaign Layout	Parker George, 2/26/2021, 10:43 AM
Parent Campaign Layout	Parker George, 2/26/2021, 10:43 AM
Partner-Led Campaign	SDO_A1, 2/26/2021, 10:43 AM
Partner-Led Campaign (for Partners)	SDO_A1, 2/26/2021, 10:43 AM

***Note: These steps are recommended but not required**

A stylized illustration of a forest landscape. Two large, dark brown trees with thick trunks and dense green foliage frame the top and sides of the image. In the background, there are rolling green hills and several tall, thin evergreen trees. The sky is a light, hazy blue. In the bottom right corner, there are some smaller green plants and yellow flowers. A small red and white bird is perched on a branch of the tree on the left.

Campaign Marketplace in Experience Cloud

Campaign Marketplace

Experience Cloud



Use the Campaign Marketplace component to share your Campaigns

The screenshot displays the Campaign Marketplace interface. At the top, there is a header with a lightning bolt icon and the text 'Campaign Marketplace'. Below this, the main content area is titled 'Available Campaigns' and contains two campaign cards. The left card is for 'Nurture Marketing Campaign', which is an email campaign. The right card is for 'Regional Field Marketing', which is an event. Each card includes a description, type, and end date.

Type	End Date
Email	8/31/2021
Event	8/31/2021



A stylized illustration of a forest landscape. Two large, dark brown trees with thick trunks and dense green foliage frame the top and sides of the image. In the background, there are rolling green hills under a light blue sky. Several green pine trees are scattered across the landscape. In the foreground, there are various green plants and flowers, including a small red and white bird perched on a branch of the tree on the left.

Tips and Best Practices

Campaign Marketplace - Tips and Best Practices

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- Campaign images should be about 600px by 200px
 - **Tip:** Be sure the 'Campaign Image' field is on the Campaign page layout
- Check the following if you are having issues seeing a Campaign in the Marketplace
 - Is the **Active** checkbox field checked?
 - Is the **End Date** field set to a past date?
 - Is the **List View** set up to show the correct campaigns?
 - Does the user have access to the [Campaign object and records](#)?
- **Tip:** When a Partner 'Signs Up' for a Campaign, a child Campaign is created for the Partner. Additional considerations for mapping data to the child Campaign can be found in ['Best Practices for Campaign Marketplace'](#).

Resources

Campaign Marketplace in Experience Cloud

Set Up Campaign Marketplace

https://help.salesforce.com/articleView?id=ccf_overview.htm&type=0

Best Practices for Campaign Marketplace

<https://www.learnexperiencecloud.com/s/article/Assessing-Your-Self-Service-Community-Experience>

Campaign Basics

https://trailhead.salesforce.com/en/content/learn/modules/campaign_basics



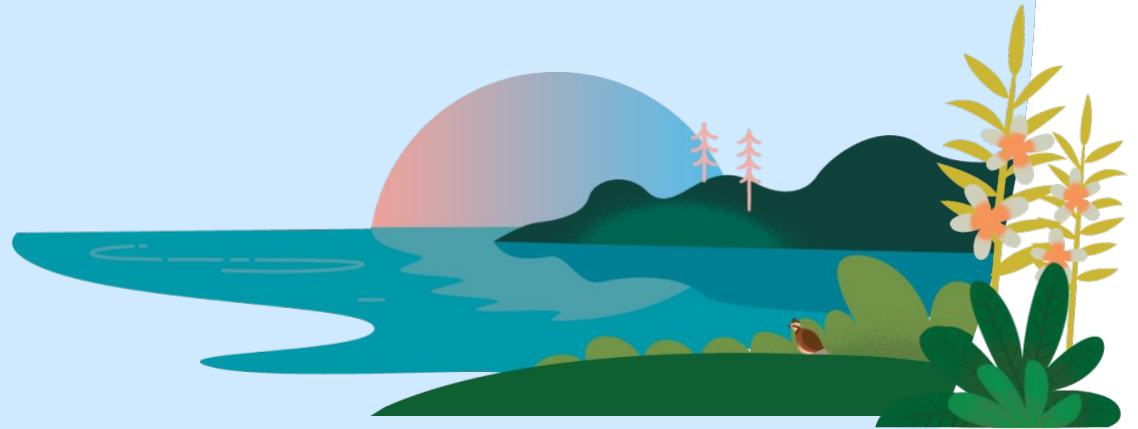
The text "Q&A" in a bold, blue, sans-serif font, centered in the middle of the page. The background is a stylized illustration of a forest with large trees, a bird, and a blue sky.



Agenda

MFA Basics

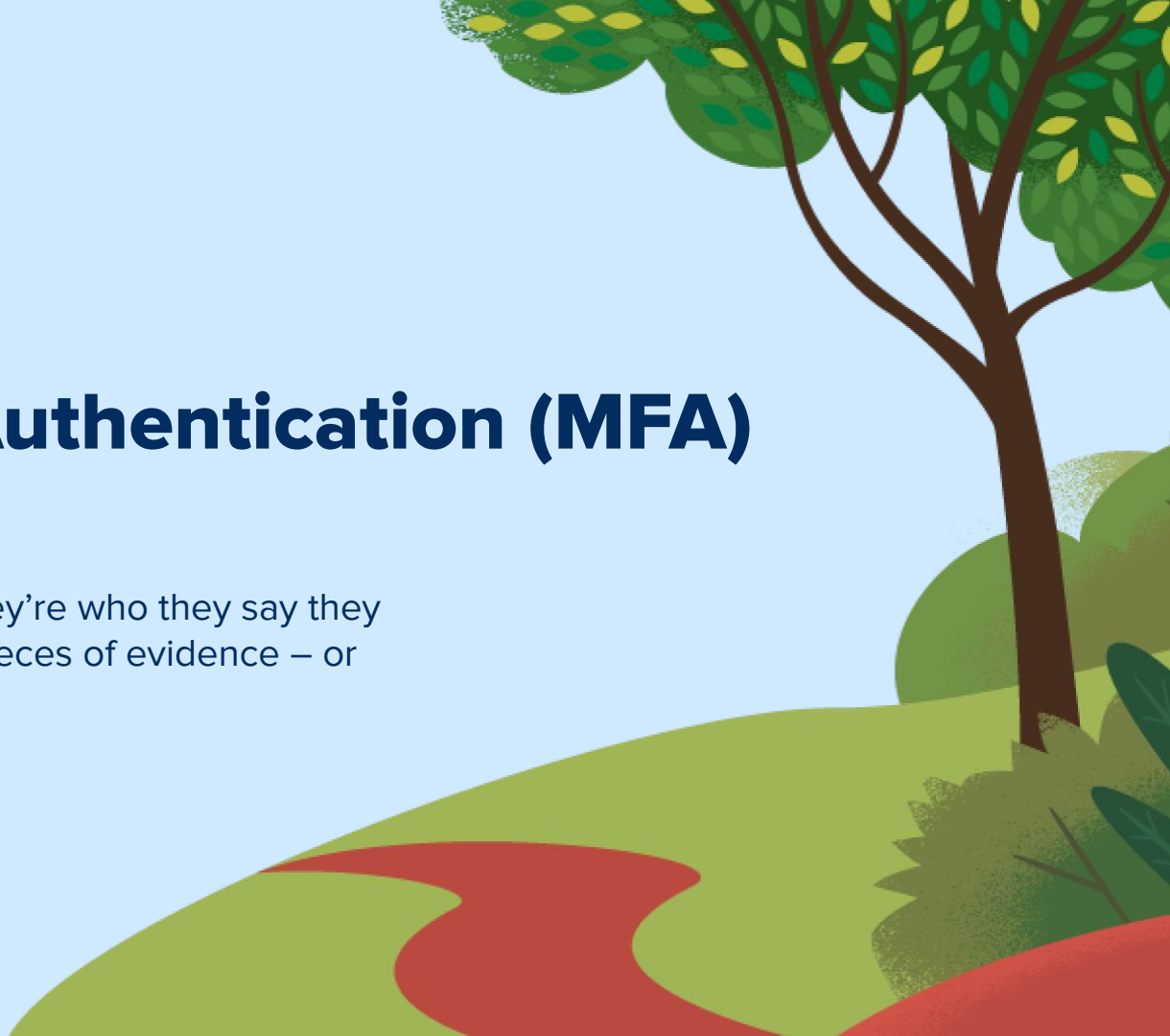
- What is MFA?
- How MFA Works
- Verification Methods
- Enabling MFA
- FAQs
- Resources
- Q&A





Multi-Factor Authentication (MFA) Basics

MFA requires users to prove they're who they say they are by providing two or more pieces of evidence – or factors – when they log in.

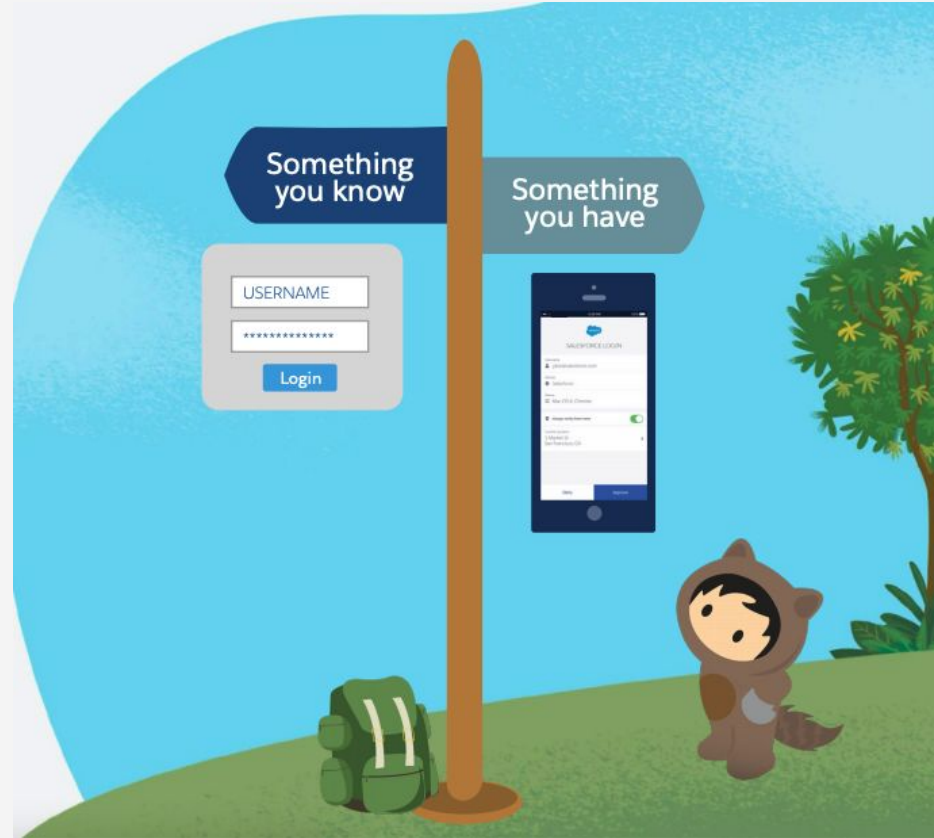


How does Multi-Factor Authentication Works



- Username and Password

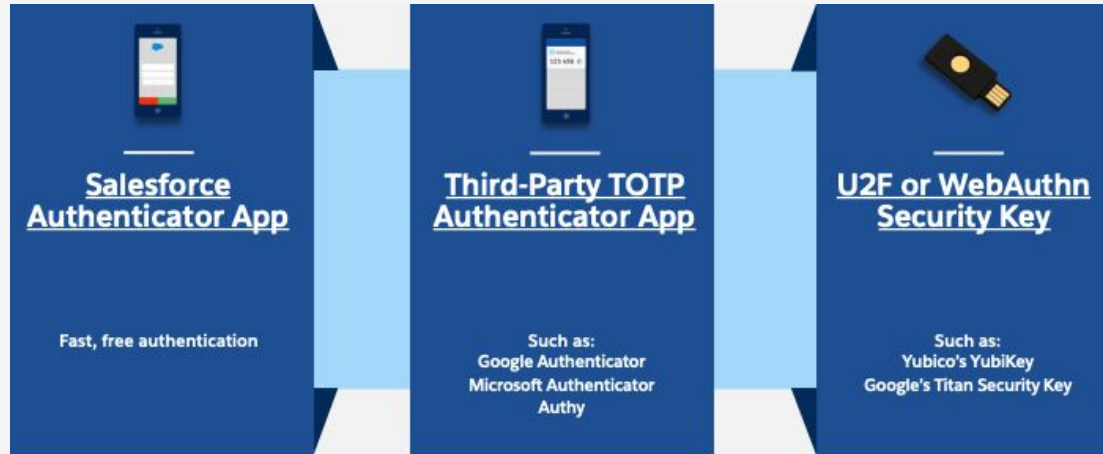
- Authenticator App or Security Key



MFA Verification Methods for Salesforce



- User enters the username and password, as usual
- Then the user is prompted to provide a verification method



Enabling Multi-Factor Authentication



- In Setup, enter “Permission Set” in the Quick Find box.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search box on the left contains 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a 'Help for this Page' icon. Below the title, there is a dropdown menu for 'All Permission Sets' and buttons for 'Edit', 'Delete', and 'Create New View'. A table lists various permission sets with columns for Action, Label, Description, License, Created Date, and Created By. The table is filtered to show 25 items, with 0 selected. The page footer shows 'Page 1 of 11'.

Action	Permission Set Label	Description	License	Created Date	Created By
Del Clone	* Please Add New Permsets to the Admin_User_Perm...	It improves performance of the app to have them grouped.		8/15/2021	John Kim
Clone	AI Platform	AI Platform Permission Set	Cloud Integration User	8/15/2021	John Kim
Clone	Access Walkthroughs	Users can view custom walkthroughs in Lightning Exper...	Walkthroughs	8/15/2021	--
Clone	ActionPlans		Action Plans	8/15/2021	--
Clone	Advanced Approvals Admin	Admin user permissions across all Salesforce CPQ Adv...		8/15/2021	SDO_A2
Clone	Advanced Approvals User	Standard user permissions across all Salesforce CPQ A...		8/15/2021	SDO_A2
Del Clone	Analytics Demo Integration			8/15/2021	SDO_A5
Del Clone	Analytics Demo Tools Standard			8/15/2021	SDO_A8
Clone	Analytics View Only User	User permissions for View-only licensed apps.	Analytics View Only Embedded App	8/15/2021	--
Clone	Appointment Assistant Guest Permissions	Provides the relevant permissions for a community gue...		8/15/2021	SDO_A4
Clone	Appointment Assistant Guest Permissions	Provides the relevant permissions for a community gue...		8/15/2021	SDO_A4
Clone	AuthorizeDotNet Admin			8/15/2021	SDO_A2
Del Clone	B2B Commerce - Bundle Product Admin	What: Bundle Product Admin		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Bundle Product User	What: Bundle Products User		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Cart Validation Users	What: Cart Validation Standard User		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Cross-Sell Recommendations Admin	What: Cross-Sell Recommendations Admin User		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Cross-Sell Recommendations User	What: B2B Commerce Cross-Sell Recommendations St...		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Customer Community Plus	What: This is for users with license: Customer Portal M...		8/15/2021	SDO_hp
Del Clone	B2B Commerce - Featured Products Component	What: Featured Products Component access		8/15/2021	SDO_A7
Del Clone	B2B Commerce - Guest	What: Grants anonymous users access to the communi...		8/15/2021	SDO_A7

Enabling Multi-Factor Authentication



- Create a new Permission Set for MFA

The screenshot displays the Salesforce Setup interface for creating a new Permission Set. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Permission Sets' and 'Create'. The 'Enter permission set information' section is active, showing the following fields:

- Label:** Multi-Factor Authentication Required
- API Name:** Multi_Factor_Authentication_Required
- Description:** Requires MFA when users log in to Salesforce
- Session Activation Required:**

The 'Select the type of users who will use this permission set' section is also visible, with the following information:

- Who will use this permission set?:** (Instructions: Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses. Choose a specific user license if you want users with only one license type to use this permission set. Choose a specific permission set license if you want this permission set license auto-assigned with the permission set. Not sure what a permission set license is? [Learn more here.](#))
- License:** --None--

Enabling Multi-Factor Authentication



- Once you save it, use “Find Settings” box to locate the “Multifactor-Authentication for User-Interface login” permission.

The screenshot shows the Salesforce Setup interface for a Permission Set. The breadcrumb trail is Setup > Home > Object Manager > Permission Sets. A search bar at the top left contains the text "Permission Sets". The left sidebar shows a navigation menu with "Users" and "Permission Sets" (selected). Below the sidebar, a message reads: "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Permission Sets" and displays the configuration for the "Multi-Factor Authentication Required" permission set. The page includes a search bar for the permission set name, which currently contains "user interface log". Action buttons for "Clone", "Delete", "Edit Properties", and "Manage Assignments" are visible. The configuration details are as follows:

Description	Requires MFA when users log in to Salesforce	API Name	Multi_Factor_Authentication_Required
System Permissions			
Multi-Factor Authentication for User Interface Logins			
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	John Kim, 8/16/2021, 6:02 PM
Last Modified By	John Kim, 8/16/2021, 6:02 PM		

Below the configuration details, there is an "Apps" section with the following sub-sections:

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages
- External Data Source Access**: Permissions to authenticate against external data sources
- Flow Access**: Permissions to execute Flows
- Named Credential Access**: Permissions to authenticate against named credentials
- Data Category Visibility**: Define access to data categories
- Service Presence Statuses Access**: Permissions to access Service Presence Statuses

At the bottom left of the "Apps" section, there is a note: "Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)"

Enabling Multi-Factor Authentication



- Then, click edit at the top of the screen and select “Multi-Factor Authentication for User-Interface login” permission.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'Multi-Factor Authentication for User Interface Logins' permission is checked, while all other permissions are unchecked.

Permission Name	Permission Description	Status
Manage Tableau CRM Private Assets	Delete Tableau CRM datasets in other users' My Private Apps.	<input type="checkbox"/>
Manage Tableau CRM Subscriptions	Read and delete user subscriptions in Lightning Experience.	<input type="checkbox"/>
Manage Tableau CRM Templated Apps	Create and manage apps based on available app templates.	<input type="checkbox"/>
Manage Translation	Manage translated labels in the Translation Workbench.	<input type="checkbox"/>
Manage Trust Measures	Create, edit and delete trust measures.	<input type="checkbox"/>
Manage Unlisted Groups	View and moderate unlisted Chatter groups.	<input type="checkbox"/>
Mass Edits from Lists	Edit multiple records simultaneously from a list with inline editing.	<input type="checkbox"/>
Mass Email	Send mass emails to contacts and leads.	<input type="checkbox"/>
Merge Topics	Merge one or more topics.	<input type="checkbox"/>
Moderate Chatter	Deactivate Chatter Free users, assign moderator privileges to Chatter Free users, and remove posts.	<input type="checkbox"/>
Moderate Chatter Messages in Experience Cloud Sites	Moderate Chatter Messages in Experience Cloud sites.	<input type="checkbox"/>
Moderate Experience Cloud Site Feeds	Moderate Chatter Feeds in Experience Cloud sites.	<input type="checkbox"/>
Moderate Experience Cloud Site Users	Allows users to manage Experience Cloud site member access, such as freezing a user.	<input type="checkbox"/>
Moderate Files in Experience Cloud Sites	Moderate Salesforce Files in Experience Cloud sites.	<input type="checkbox"/>
Modify All Data	Create, edit, and delete all organization data, regardless of sharing settings.	<input type="checkbox"/>
Modify Data Classification	View and modify field-level data classification metadata.	<input type="checkbox"/>
Modify Metadata Through Metadata API Functions	Create, read, edit, and delete org metadata. Users must have appropriate access rights to the metadata they're trying to modify. Be careful if delegating this permission. Some metadata executes in system context, when object permissions, field-level security, and sharing rules that apply to the user are ignored. For example, Apex executes in system context.	<input type="checkbox"/>
Modify Secure Agents	Allow user to make changes to Secure Agents	<input type="checkbox"/>
Multi-Factor Authentication for API Logins	Require users to enter a code from a time-based one-time password (TOTP) authenticator app instead of the emailed security token in the API.	<input type="checkbox"/>
Multi-Factor Authentication for User Interface Logins	Require users to provide an additional verification method in addition to their username and password when logging in to Salesforce orgs.	<input checked="" type="checkbox"/>
myTrailhead Branding Management	Let users manage branding on myTrailhead.	<input type="checkbox"/>
myTrailhead Content Access	Let users log in to myTrailhead and view private namespaces.	<input type="checkbox"/>
myTrailhead Content Creation	Give users access to Trailmaker content-styling tools.	<input type="checkbox"/>
myTrailhead Custom Steps	Let users create custom steps in trailmixes.	<input type="checkbox"/>
myTrailhead Preview Mode	Let users preview content on myTrailhead.	<input type="checkbox"/>
myTrailhead Release Management	Let users manage content releases.	<input type="checkbox"/>
Natural Language Search	Show results for natural language searches and list views.	<input type="checkbox"/>
Notification Emails: Add Recipients	Specify recipients of email notifications from Tableau CRM dashboard widgets. All recipient email addresses appear in the "to:" field of the emails, so recipients can see each other's email addresses regardless of User Sharing settings.	<input type="checkbox"/>
Password Never Expires	Prevent the user's password from expiring.	<input type="checkbox"/>

Enabling Multi-Factor Authentication



- Next, you would assign the permission set to your users. Once you click on “Manage Assignments” then “Add Assignments,” you can check the box next to the user who should login with MFA.

SETUP
Permission Sets

Assign Users
Admin Users Help for this Page

View: Admin Users [Edit](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Username	Assign	Email	Role	Profile
<input type="checkbox"/> Edit Login	Bot_GlTch	glTtch.vi7nd3wstskl.ce3d8mfymk@kimjohn-20210815.demo	<input type="checkbox"/>	glTtch@example.com		System Administrator
<input type="checkbox"/> Edit Login	Bot_Bldr	rbot@kimjohn-20210815.demo	<input type="checkbox"/>	rbot@example.com		System Administrator
<input type="checkbox"/> Edit Login	Bot_Sunrv	sbot@kimjohn-20210815.demo	<input type="checkbox"/>	sunrvbot@example.com		System Administrator
<input type="checkbox"/> Edit Login	Bot_Tracker	tbot@kimjohn-20210815.demo	<input type="checkbox"/>	trackerbot@example.com		System Administrator
<input type="checkbox"/> Edit Login	Chatbot_Einstein	cloud14dfmmmyvbn.7boy9u3ufg0@kimjohn-20210815.demo	<input type="checkbox"/>	cloud@example.com		System Administrator
<input type="checkbox"/> Edit Login	Dispatcher_Samantha	samdisoatch.copghdvrooh.wrcm1j9uebb@kimjohn-20210815.demo	<input type="checkbox"/>	sdisatch@example.com	CEO	System Administrator
<input type="checkbox"/> Edit Login	Exchange_Apc	apex.myyf5f9zrx.0az2kferds@kimjohn-20210815.demo	<input type="checkbox"/>	jchase@example.com	CEO	System Administrator
<input type="checkbox"/> Edit Login	Executive_Elliot	exexec.mjuy1kqare.z7nrv11paf0a@kimjohn-20210815.demo	<input type="checkbox"/>	exexec@example.com	VP of Sales	System Administrator
<input type="checkbox"/> Edit Login	Helcor_Einstein	ehelc.bodho00h7aj.kkquolroevjn.qvstalatiba@kimjohn-20210815.demo	<input type="checkbox"/>	harul.oark@example.com		Integration Admin
<input checked="" type="checkbox"/> Edit	Kim_John	kimjohn@kimjohn-20210815.demo	<input type="checkbox"/>	kim.john@salesforce.com	CEO	System Administrator
<input type="checkbox"/> Edit Login	Operations_Alf	aooperations.ez9qgk2tous.ahmsocp@vui@kimjohn-20210815.demo	<input type="checkbox"/>	aooperations@example.com	VP of Customer Service	System Administrator
<input type="checkbox"/> Edit Login	Patel_Neil	social.latvzomndio3k.c229btuoguyi@kimjohn-20210815.demo	<input type="checkbox"/>	npatel@example.com	Social Media Manager	System Administrator
<input type="checkbox"/> Edit Login	Social_Hub	shub.qvainvycv7.5k3icdkfhd.3oa8exv6gbx6@kimjohn-20210815.demo	<input type="checkbox"/>	vhaas@example.com	CEO	System Administrator
<input type="checkbox"/> Edit Login	Technician_James	james.5iqqz1aniv.z8rycuh25voc@kimjohn-20210815.demo	<input type="checkbox"/>	james.tech@example.com		System Administrator
<input type="checkbox"/> Edit Login	User_Einstein	user.vbuu935nvg.ccz888coaxem.q62awy0ouz@kimjohn-20210815.demo	<input type="checkbox"/>	harul.oark@example.com		Integration Admin

Show me fewer ▲ records per list page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All



Best Practices/FAQs



1. If you implement MFA for your customer or partner Experience Cloud sites, external users are able to log in using [SMS text messages as a verification](#) method. This option allows you to provide an extra layer of security for your sites while maintaining ease of access for users who don't interact with business-critical data.
2. MFA is not required for your company's Experience Cloud sites, employee communities, help portals, or e-commerce sites/storefronts. You don't have to enable MFA for external users who access these sites.
3. Sandbox



Resources

Multi-Factor Authentication

[Salesforce Multi-Factor Authentication FAQ](#)

[Securing Salesforce Account Access with Multi-Factor Authentication \(Webinar\)](#)

[Multi-Factor Authentication Guide for Admins](#)

[Multi-Factor Authentication Customization](#)



TRAILHEAD



The text "Q&A" in a bold, blue, sans-serif font, centered in the middle of the page. The background is a stylized illustration of a forest scene with two large trees framing the top and sides, a small bird on the left tree, and various green plants and hills at the bottom.

Thank You

