



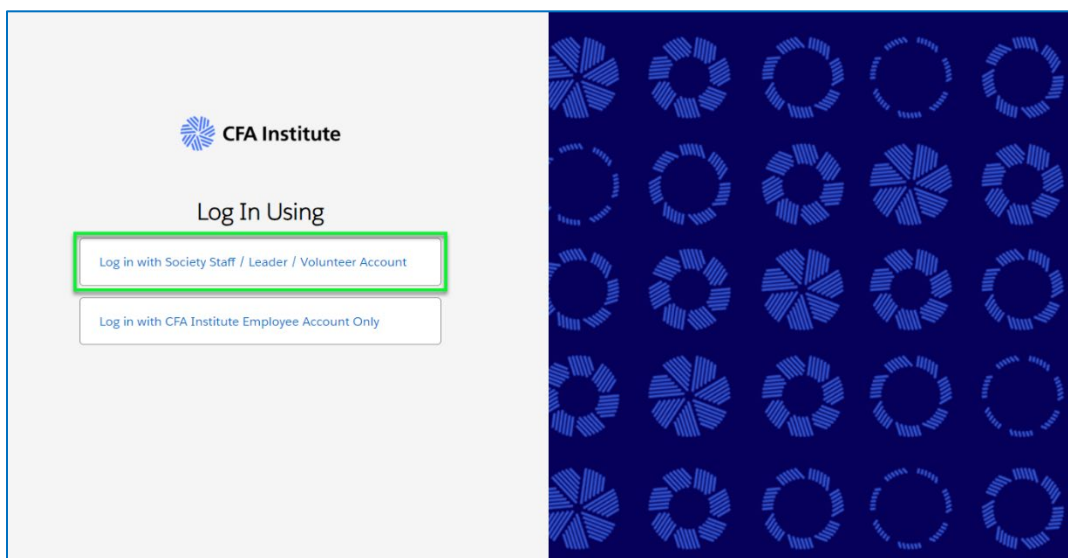
Logging in to Salesforce

Welcome to Salesforce! This platform is intended to be the single system for societies to access contact data. To log into the system, please follow these steps:

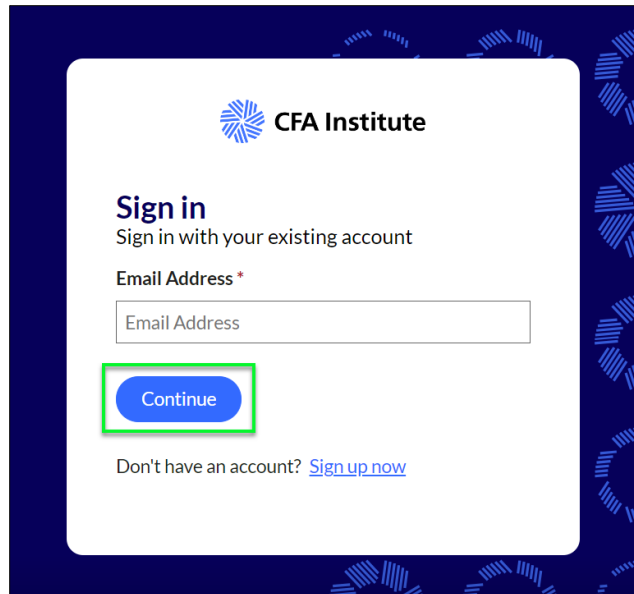
1. Close browser tabs to other CFA Institute sites. We recommend using Chrome, Edge, or Firefox as your browser.
2. Clear your browser's cache and cookies. This step ensures former logins are not being cached.
3. Login to Salesforce using the appropriate link:
 - Full License (users with Marketing Cloud access): <https://cfainstitute.my.salesforce.com>
 - Partner License (all other users): <https://cfainstitute.my.site.com/partners>

Unsure which link to use? Look for your welcome email or contact the Society Operations team via the Society Support Center to verify your access information.

4. You will see a screen like the one below. Choose the option for **Log in with Society Staff / Leader / Volunteer Account**.



5. On the Log In screen, please enter the email and password associated with your CFA Institute account. Click the blue buttons to continue.



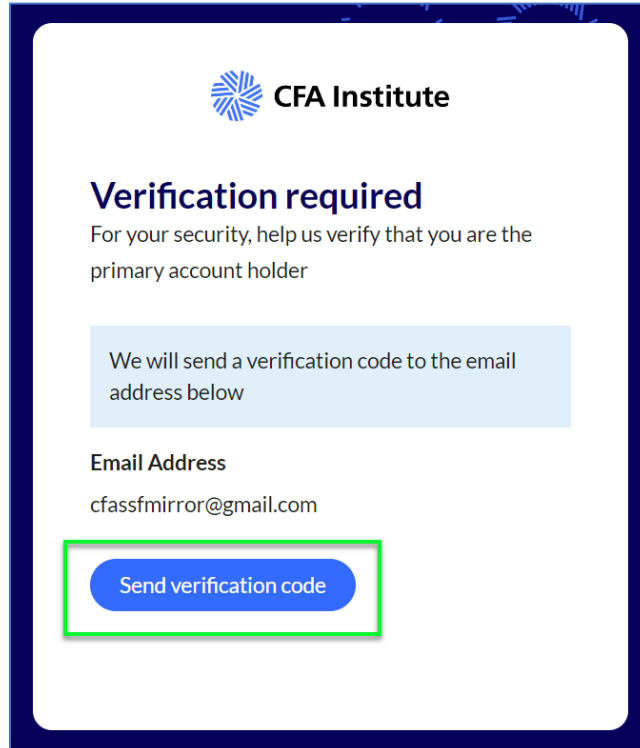
The image shows the CFA Institute login interface. At the top is the CFA Institute logo. Below it, the text "Sign in" is followed by "Sign in with your existing account". There is a label "Email Address *" above a text input field containing the placeholder "Email Address". Below the input field is a blue button with the text "Continue", which is highlighted with a green rectangular border. At the bottom, there is a link that says "Don't have an account? [Sign up now](#)".



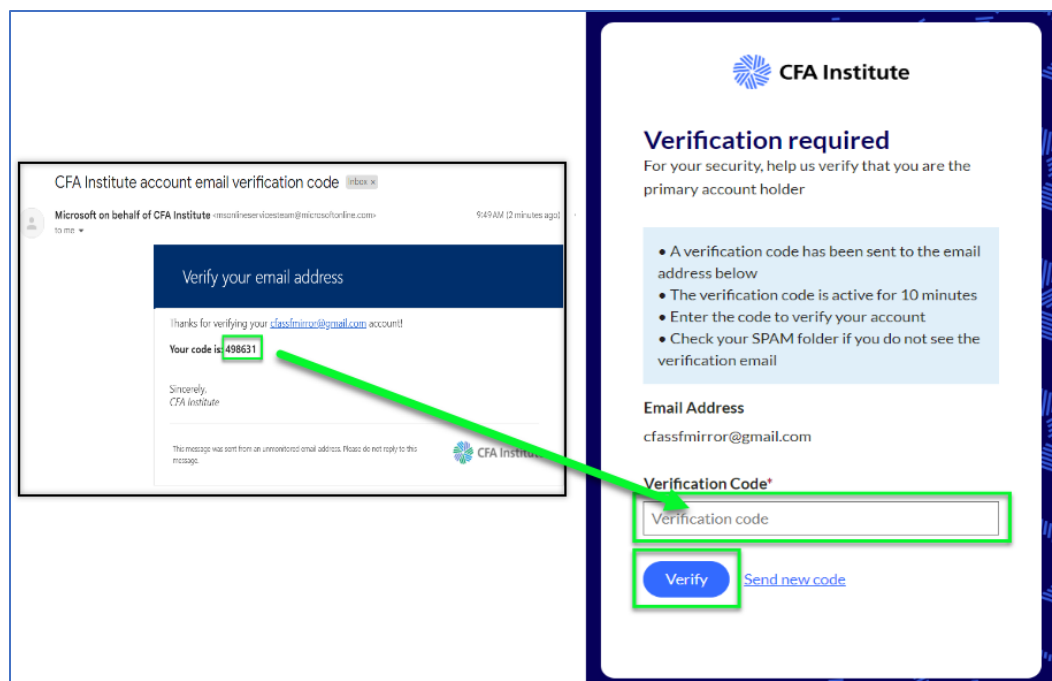
The image shows the CFA Institute login interface. At the top is the CFA Institute logo. Below it, the text "Sign in" is followed by "Enter your password". There is a label "Password*" above a password input field filled with dots. Below the input field is a link that says "[Forgot your password?](#)". At the bottom is a blue button with the text "Sign in", which is highlighted with a green rectangular border.

6. Upon entering your CFA Institute account login details, you will receive a “Verification” screen. As part of the multi-factor authentication process to ensure the security of our platforms, a 6-digit code will be sent to the email that is associated with your Salesforce license.
 - **Time to Receive the Code:** the code can take seconds to upwards of 5 minutes to receive based on internet traffic and your firewall and email spam settings. The email is being sent from noreply.societyoperations@cfainstitute.org. Please check your Spam or Junk folder to ensure the email has not landed there.
 - **Entering the Code:** the code must be entered within 10 minutes, or a new one will need to be requested.

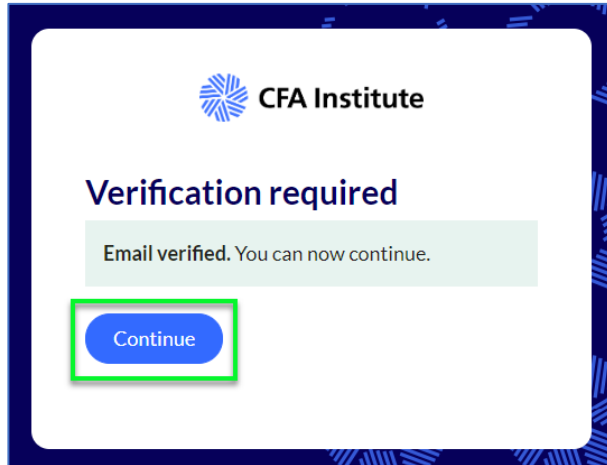
Click Send Verification Code and the system will generate and email you a code.



7. Check your email for a message from noreply.societyoperations@cfainstitute.org with the subject: CFA Institute Account Verification Code. Enter the bolded code onto the Salesforce verification screen and click the "Verify" button to login to the platform.



8. Once the code is verified, click Continue and you will see a Salesforce screen. You are now logged in.



Issues? If the code has not been received within 10 minutes or multiple unsuccessful login attempts have occurred please contact the Society Operations team at societysupport@cfainstitute.org for further assistance.