Set Up and Manage Salesforce Communities

Salesforce, Summer '19

@salesforcedocs

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CONTENTS

Set Up and Manage Salesforce Communities 1

Salesforce Communities Overview 3
- Plan Your Implementation 5
- Prerequisites 6
- How Communities Use Lightning 6
- Browser Support for Communities 8
- Access Communities in the Salesforce App 9
- Lightning Communities Limitations 11
- Communities Usage Allocation 13

Setting Up a Community 16
- Enable Salesforce Communities 17
- Manage Your Community with Community Workspaces 18
- Update Org-Wide Community Settings 20
- Community Setup Basics 31
- Customize Login, Self-Registration, and Password Management for Your Community . . . 87
- Enable Other Salesforce Features in Communities 105
- Deploy a Community from Sandbox to Production 141

Community Authentication and Security 147
- Enable Clickjack Protection in Communities 148
- Authenticate Community Users 149
- Encrypt Community Data 156
- Content Security Policy in Lightning Communities 156

Secure Your Community or Portal 162
- Give Secure Access to Unauthenticated Users with the Guest User Profile 163
- SEO Best Practices and Considerations for Guest Users 168
- Community User Visibility Best Practices for Guest Users 169
- Control Public Access to Your Lightning Community with Community Builder 170
- Object-Specific Security Best Practices for Guest Users 174
- Test Guest User Access in Your Community or Portal 176

Plan Your Community Design Strategy 176
- Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities 177
- Use Visualforce and Salesforce Sites 179

Override Default Pages in Your Community with Custom Pages 180
- Use a Custom Page for Service Unavailability 180
- Use a Custom Community Home Page 181
- Add Custom Pages That Don't Require Login 183

Which Community Template Should I Use? 184
- The Customer Account Portal Template 186

The Partner Central Template . . . 187
The Customer Service Template . . . 190
The Build Your Own Template . . . 193
Objects Supported by Out-of-the-Box Components and Pages in Community Templates . . . 193
Customer Service Community Setup Checklist . . . 198
Migrate a Koa or Kokua Template Community to a New Template . . . 199
Which Components Can I Use with Each Template? . . . 201
Customize Communities with Community Builder . . . 384
Community Builder Overview . . . 384
Manage Your Community's Pages and Their Properties in Community Builder . . . 422
Share More Salesforce Object Data in Your Community . . . 448
Track Community Users with Your Google Analytics Tracking ID . . . 455
Multilingual Communities Overview . . . 457
Improve Community Performance . . . 463
Analyze and Improve Community Performance . . . 464
Community Cloud Content Delivery Network Considerations . . . 468
Set Up the Community Cloud Content Delivery Network . . . 469
Improve Community Performance with Browser Caching . . . 471
Progressive Rendering Overview . . . 472
Progressive Rendering Guidelines . . . 473
Prioritize Component Display Order with Progressive Rendering . . . 474
Salesforce Content Management System (CMS) . . . 476
Start Using Salesforce CMS . . . 479
CMS Workspaces . . . 481
Create Content . . . 493
Organize Content . . . 500
Add Your Content to Your Community . . . 514
Connect Your External Content Management System to Your Community . . . 525
Before Using CMS Connect . . . 526
Create a CMS Connection . . . 528
Edit a CMS Connection . . . 532
Connect JSON Content from Your CMS to Your Community . . . 533
Personalized Content in CMS Connect . . . 534
Change the Load Order of CMS Connections . . . 535
Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse . . . 536
Create a Lightning Bolt Solution . . . 538
Export a Customized Lightning Community Template in a Lightning Bolt Solution . . . 539
Export a Customized Community Theme in a Lightning Bolt Solution . . . 541
Export a Customized Community Page in a Lightning Bolt Solution . . . 543
Add Flows to a Lightning Bolt Solution . . . 544
Export and Packaging Considerations for Lightning Bolt Solutions . . . 545
Requirements for Distributing Lightning Bolt Solutions . . . 547
Package and Distribute a Lightning Bolt Solution . . . 548

Community Management 549
Community Managers, Moderators, and Admins Working Together 549
Measure Community Success with Dashboards 557
Community Cloud and Marketing Cloud Integration with Journey Builder 562
Community Journey Data Model 564
Email Preferences 564
Triggering Journeys Based on Events 565
Triggering Journeys Based on Audiences 565
Determine If an Object Can Trigger Journeys 566
Sync an Object to the Marketing Cloud 566
Community Objects for Creating Member Journeys 567
Insights for Community Engagement 568
Enable and Map Engagement Insights for Community Managers 570
Create Your Own Insights for Your Community 571
Create Custom Actions for Community Insights 572
View and Customize Engagement Insights for Your Community 576
Community Moderation Strategies and Tools 577
Track Community Activity with the Moderation Overview Page 579
Enable Members to Flag Items in Your Community 580
Community Moderation Criteria 580
Community Moderation Rules 583
Review and Approve Posts and Comments in Your Community 591
Moderate Flagged Posts and Comments in Your Community 592
Moderate Flagged Discussions in Your Community 594
Moderate Flagged Files in Your Community 596
Moderate Flagged Direct Messages in Your Community 597
Moderate Flagged Private Messages in Your Community 598
Set Up Apex Triggers for Flagging Items 599
Community Pulse 600
Communities Moderation Limits and Limitations 601
Organize Communities with Topics 601
Manage Topics in Communities 605
Automatically Assign Topics to Articles 606
Set Up Featured Topics 608
Set Up Navigational Topics 609
Set Up Content Topics (Beta) 610
See Your Community's Topics and Subtopics in One Place 610
Add Topics to Articles or Remove Them 612
Translate Topics Names and Descriptions for Communities with International Audiences 613
Customize Recommendations in Communities 614
Create Targeted Audiences for Your Community Recommendations 616
Gamification 616
Recognition Badges 617

Reputation Overview . . . 630
Community Reporting . . . 636
Report on Communities with the AppExchange Packages for Community Management . . . 637
Service Community Scorecard . . . 700
Set Up Report Management for External Users—Create and Edit Reports . . . 702
Track Community Activity with Custom Reports . . . 703
Communities Report and Dashboard Considerations . . . 705
Allow External Users to Report on Tasks and Events . . . 706
Google Analytics™ for Salesforce Communities Package . . . 707
Manage Partner Relationships in Communities . . . 719
Partner Central—Build Lightning Partner Communities . . . 720
Create a Partner Community with Partner Central—Setup Tasks . . . 721
Enable Partner Functionality in Your Org . . . 722
Migrate from a Partner Portal to a Community . . . 723
Prep Your Org for a Partner Community . . . 724
Manage Channel Partnerships with Channel Programs and Levels . . . 741
Partner Account Relationships and Account Relationship Data Sharing Rules . . . 744
Lead Distribution and Deal Registration . . . 751
Market Development Funds . . . 760
Reach More Customers with Channel Marketing . . . 772
Track Performance with Partner Scorecard . . . 775
Configure Features with Guided Setup . . . 778
Configure Guided Setup Reports . . . 781
Manage Customer Relationships with the Community Cloud . . . 784
Build a Portal with the Customer Account Portal Solution . . . 784
Create a Customer Account Portal—Setup Tasks . . . 785
What's Your Customer Account Portal Strategy? . . . 786
Extend Salesforce to Customers with the Correct Licenses . . . 787
Give Customers Access to Your Knowledge Base Through Help Center . . . 787
Help Center Setup Tasks . . . 788
Create a Help Center . . . 789
Help Center Template Pages . . . 791
Change from Help Center to a New Template . . . 792
Educate Your Users About Communities . . . 793
Switching Between Your Salesforce Org and Your Communities . . . 794
Share Personal Contact Information Within Communities . . . 796
Search Behavior in Communities . . . 798
Manage Your Community Email Notifications . . . 800
Chatter in Communities . . . 801
Community Cloud Cookies . . . 827
Communities Resources . . . 828

Index . . . 829

SET UP AND MANAGE SALESFORCE COMMUNITIES

Communities are branded spaces for your employees, customers, and partners to connect. You can customize and create communities to meet your business needs, then transition seamlessly between them.

You can use Communities to:

- Drive more sales by connecting your employees with your distributors, resellers, and suppliers
- Deliver world-class service by giving your customers one place to get answers
- Manage social listening, content, engagement, and workflow all in one place

Base your community on one of our preconfigured Lightning Community templates with drag-and-drop components, or on standard Salesforce functionality and tabs. With Communities, you can share a subset of features and data from your internal Salesforce org, and customize your community to use your company branding.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Communities live inside your org and can be easily accessed from the App Launcher in Lightning Experience or the global header in Salesforce Classic.

Check out Communities and Community Users in Your Salesforce Org, a quick video about how communities live in an org, the differences between community licenses, and how Salesforce accounts and community users are associated with one another.

IN THIS SECTION:

Salesforce Communities Overview

Communities are a great way to share information and collaborate with people who are key to your business processes, such as customers, partners, or employees. Whether you call it a portal, a help forum, a support site, HR central, or something else, an online community is a great place to connect with the important folks in your life in a new and different way. Use easy point-and-click branding tools with ever-evolving Lightning templates or go with Visualforce to create branded collaboration spaces.

Setting Up a Community

Setting up a community includes a series of tasks that you must perform in Salesforce setup and in the community itself. From enabling communities to setting up user profiles for community membership and designing your community, we've got you covered!

Community Authentication and Security

You can help keep your community more secure by enabling clickjack and other protections, authenticating users, and encrypting some of the community's data.

Secure Your Community or Portal

Communities and portals help you connect with customers and partners. When building your community or portal, you can use various settings and permissions to protect your data and your customers' data. Keeping your data secure is a joint effort between you and Salesforce.

Plan Your Community Design Strategy

Which Community Template Should I Use?

Community templates let you build responsive communities for delivering rich, branded spaces for your customers and partners.

Customize Communities with Community Builder

Use templates to quickly set up a community and then customize it with your company's branding, share Salesforce records with community members, and work with them in a collaborative space that meets your needs.

Improve Community Performance

Use the Community Page Optimizer to analyze community performance. Use the Community Cloud Content Delivery Network and browser caching to improve page load times.

Salesforce Content Management System (CMS) (Beta)

A content management system (CMS) lets you create and manage content from a single location, and then use that content in multiple places. With Salesforce CMS, you can share content across communities, curate content on a community by community basis, and assign access roles to control who creates content.

Connect Your External Content Management System to Your Community

Do you have a website built in an external content management system (CMS)? You can connect that CMS content to your community for consistent branding, reuse of material, and ease of maintenance.

Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.

Community Management

Community Management is your one-stop shop for administering, managing, and moderating your community.

Community Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your community based on triggering events or geared for specific audiences. Greet new members with rich content emails, send reminders to members who need profile pics, or schedule follow-up emails for members who log a case. To use this feature, you must have both Communities and Marketing Cloud licenses.

Insights for Community Engagement

Insights are reports that help your community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage community engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

Community Moderation Strategies and Tools

Community moderation allows you to empower members of your community to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Organize Communities with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in a community. Use topics to structure your community content or highlight key discussions. You can create topics or use the topics that organically emerge from community member posts.

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your community.

Community Reporting

Use community reporting to see short-term and long-term trends in various areas of your community. The preconfigured AppExchange package makes reporting a snap for community managers. You can also give the power of reporting to your community members.

Educate Your Users About Communities

Tell community members what to expect from their community experience.

Communities Resources

SEE ALSO:

Plan Your Implementation
Enable Salesforce Communities
Create Communities
Manage Your Community
Communities Resources

Salesforce Communities Overview

Communities are a great way to share information and collaborate with people who are key to your business processes, such as customers, partners, or employees. Whether you call it a portal, a help forum, a support site, HR central, or something else, an online community is a great place to connect with the important folks in your life in a new and different way. Use easy point-and-click branding tools with ever-evolving Lightning templates or go with Visualforce to create branded collaboration spaces.

You can create multiple communities within your organization for different purposes. For example, you could create a customer support community to reduce support costs, or a channel sales community for partner deal support, or you could have a community dedicated to an upcoming event.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Base your community on one of our preconfigured Lightning Community templates with drag-and-drop components, or on standard Salesforce functionality and tabs. With Communities, you can share a subset of features and data from your internal Salesforce org, and customize your community to use your company branding.

Learn About Communities

Before you create a community, we recommend going over a few key concepts in Trailhead.

- Community Cloud Basics (Module)
- Community Rollout Strategy (Module)
- Communities and Community Users in Your Salesforce Org (Video)

Create, Design, and Manage Communities

- Set Up and Manage Communities (PDF)
- Community Managers Guide (PDF)
- Report on Communities with the AppExchange Packages for Community Management
- Google Analytics™ for Salesforce Communities Package
- Set Up SEO for Your Community
- Who Sees What in Communities Series (Video)

Limitations, Supported Browsers, and Mobility

- Communities User Licenses
- Browser Support for Communities
- Access Communities in the Salesforce App

Advanced Community Customization

- Lightning Communities Developer Guide
- Community Cloud Developer Center
- Build a Custom Theme Layout Component for Lightning Communities (Project)
- Customize Your Community (Trail)
- Lightning Aura Components Developer Guide
- Lightning Web Components Developer Guide
- Visualforce Developer Guide
- Visualforce Component Reference

AppExchange Packages to Use with Communities

- Community Management Package for Communities with Chatter
- Community Management Package for Communities without Chatter

Going from Portals to Communities

- Migrating from Portals to Communities (PDF)
- Create and Manage Partner Portals (PDF)

Stuck? Ask for Help in a Trailblazer Community

- Community Cloud
- Community Cloud Best Practices
- Community Management

IN THIS SECTION:

Plan Your Implementation

It helps to make a few key decisions well in advance of setting up your community and customizing it.

Prerequisites

How Communities Use Lightning

There's lots of Lightning striking Salesforce these days and it can be tricky to know how it all works together. Here's the rundown.

Browser Support for Communities

Browser support for communities varies by the device on which you access the community and the community template.

Access Communities in the Salesforce App

Accessing communities from the Salesforce mobile app depends on several factors, including the type of template used to create the community and the licenses and permissions of community members.

Lightning Communities Limitations

Be aware of the limitations that apply to Lightning communities such as Customer Service and Partner Central.

Communities Usage Allocation

Communities usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your communities. Salesforce provides tools to help you monitor communities usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

Plan Your Implementation

It helps to make a few key decisions well in advance of setting up your community and customizing it.

- Determine the business requirements of the community. What types of users are you creating the community for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or marketing.
- Estimate the size of the community. This will help determine your licensing requirements.
- Decide if you want your community content to be publicly available to guest users without licenses
- Plan the look-and-feel of your community and then evaluate the available customization options. With Communities, you have the following choices:
  - **Lightning Communities**: Community Builder comes with rich, responsive templates for communities targeted at customer support scenarios. Templates offer easy customization via an intuitive GUI and allow for a quick rollout of your community. This option doesn't require programming experience or knowledge of the Lightning platform.
  - **Visualforce + Salesforce Tabs**: Communities comes with some out-of-the-box branding themes that you can use along with standard Salesforce tabs in your community. In addition, you can use Visualforce to extensively customize your community's appearance and leverage all the capabilities of the Lightning platform. This option requires programming capabilities.

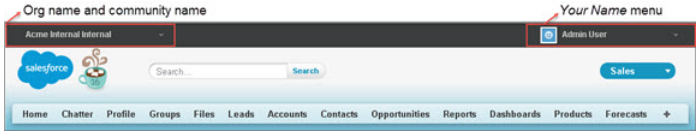
SEE ALSO:

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

Prerequisites

Before you enable Communities:

- Ensure that your organization has Communities licenses. From Setup, enter *Company Information* in the Quick Find box, then select **Company Information**. Your licenses are listed near the bottom of the page.
- Enable the global header for employees or internal users in your organization that you plan to add as members of your community. The global header lets you easily switch back and forth between your internal organization and your community. Note that the global header introduces some navigation and look-and-feel changes that will be unfamiliar to your users, so plan to alert them ahead of time.



How Communities Use Lightning

There's lots of Lightning striking Salesforce these days and it can be tricky to know how it all works together. Here's the rundown.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What is Salesforce Lightning?

Lightning includes a new experience, framework, and ecosystem. Lightning makes it easier to build responsive applications for any device.

Lightning includes these technologies:

- **Lightning Component Framework**, which gives you a UI development framework that accelerates development and app performance.
- **The Lightning App Builder** lets you build Lightning pages visually, without code, using standard and custom Lightning components. You can make your Lightning components available in the Lightning App Builder, so administrators can build custom user interfaces without code.
- **The Community Builder** is like the Lightning App Builder, except that it's used to design and build communities using Lightning components. Just like the Lightning App Builder, you can use standard or custom components so administrators can create community pages with point-and-click customization.

Some Salesforce products built with the Lightning framework include Lightning Experience, the Salesforce app, and the various Lightning-based community templates (like Customer Service, Partner Central, and Aloha) and Lightning Bolt Solutions.

What is Lightning Experience?

Lightning Experience is the name of for the desktop user experience, intended for internal Salesforce users only. For more information, see the Lightning Experience section in Help & Training.

When people talk about "Lightning communities", what do they mean?

Lightning in the context of communities means the use of Lightning components to build communities. This is done through out-of-the-box templates, such as Customer Service, Partner Central, or Lightning Bolt Solutions.

How is the Lightning framework used in communities?

Lightning communities and Lightning Experience use the same *underlying* Lightning framework technology—but it isn't necessary to enable Lightning Experience to use Lightning communities.

Think of it this way: You have a dishwasher and a washing machine in your house. Can you turn one on without the other? Of course. Sure, they have a few things in common: They both need electricity to work, they both live in your house, and have the word "wash" in their names. But they run independently of one another.

Here are some common questions (and answers!) to consider when you're thinking of using Lightning component-based community templates.

Do I need to turn on Lightning Experience in my internal org to use Lightning communities?

No! You don't need to enable Lightning Experience to use Lightning communities, such as Customer Service, Partner Central, and Lightning Bolt Solutions. Lightning communities use the same underlying technology as Lightning Experience, *but are independent of one another*.

If I turn on Lightning Experience in my internal org, can I still use the Salesforce Tabs + Visualforce template for a community?

Yes! Turning on Lightning Experience for your internal users has no impact on what template you use in our external-facing communities.

Creating a community is essentially like building a web site. You can build it with the Lightning framework or with Visualforce and the Lightning Platform. The UI enabled in your internal Salesforce org makes no difference to what UI technology you use for your community.

If I build a custom Lightning component for the Lightning App Builder, can I use it in Community Builder?

Yes! See the *Lightning Communities Developer Guide* for more information.

Can I enable Lightning Experience for my Salesforce Tabs + Visualforce communities?

No. By definition, a Salesforce Tabs + Visualforce community uses Visualforce and the Lightning Platform technology under the hood. There's no toggle in a Salesforce Tabs + Visualforce community that allows you to switch to Lightning technology. Also, remember that Lightning Experience is a user experience that's for internal Salesforce users only.

If you want a community with the Lightning look and feel, create a community with a template that uses Lightning technology.

If I turn on Lightning Experience in my internal Salesforce org, are there communities-related features that I can't use?

Switch to Salesforce Classic for the following functionality.

Feature or Setting	Available with Differences	Not Available	Notes
Global header		✔	To switch between your org and communities in Lightning Experience orgs, use the App Launcher.
Cloning or creating email templates as a Partner Community or Customer Community Plus user		✔	
Enabling Topics for Objects to make Salesforce Knowledge articles available in a community		✔	
Enabling Work.com to use Mission Badges in Lightning communities		✔	

Note: Most of the Communities functionality that is not supported in Lightning Experience affects only Salesforce admins, which doesn't prevent you from enabling Lightning Experience in your org. You can always enable Lightning Experience for most profiles in your Salesforce org, and give the System Admin profile the option to switch to Salesforce Classic.

SEE ALSO:

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

Browser Support for Communities

Browser support for communities varies by the device on which you access the community and the community template.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce Tabs + Visualforce

Salesforce Tabs + Visualforce communities are supported on all desktop browsers that Salesforce supports. These communities are also accessible from the Salesforce app.

Lightning Communities

Lightning communities, such as Customer Service, Partner Central, and Help Center, are supported on the following browsers.

On Desktop Computers

Platforms	Apple Safari (Latest Version)	Google Chrome™ (Latest Version)	Microsoft® Edge (Windows® 10 only)	Microsoft® Internet Explorer® 11	Mozilla® Firefox® (Latest Version)
Apple® Mac OS® Desktop	✔	✔			✔
Microsoft® Windows® Desktop		✔	✔	✔ (1)	✔

Note: (1) While you can still use Microsoft Internet Explorer 11 for viewing communities, you can no longer use it to access Community Builder.

If users attempt to access a Lightning community with an unsupported browser that can load the Lightning framework, they see a popup window encouraging them to update their current browser, or switch to a newer browser. If an unsupported browser is able to properly load the Lightning community, the popup window can be dismissed. To disable the popup from appearing to users, contact Salesforce Customer Support and request that the **Unsupported Browsers for Lightning Communities** permission is disabled. If you used a WebView to create a mobile Lightning community, review your current community experience to ensure that the popup window appears the way you'd like.

If users attempt to access a Lightning community in an unsupported browser that is unable to load the Lightning framework (such as IE11 or below, including IE11 in compatibility mode), they see a blank page.

Note: Users don't see the unsupported browser error message on Lightning community login pages. If you know your user base is using unsupported browsers to access your Lightning community, create Visualforce login pages to use instead of the default Lightning community login pages.

On Mobile Devices

Platforms	Apple Safari (Latest Version)	Google Chrome™ (Latest Version)	Microsoft® Internet Explorer® 11	Microsoft® Edge (Windows® 10 only)	Mozilla® Firefox® (Latest Version)
Android™ Phone and Tablet		✓			
iOS Phone and Tablet	✓				
Windows® 8 Phone			✓		
Windows® 10 Phone				✓	

Note: Only browsers that support Lightning Experience also support Community Workspaces.

SEE ALSO:

Supported Browsers for Salesforce Classic

Supported Browsers for Lightning Experience

Access Communities in the Salesforce App

Accessing communities from the Salesforce mobile app depends on several factors, including the type of template used to create the community and the licenses and permissions of community members.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Grant the Necessary Permissions

Make sure that community members can access the Salesforce app.

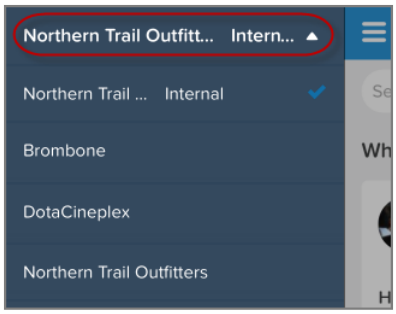
- Verify that the app is enabled for your org (default) or enable it. From Setup, enter *Settings* in the Quick Find box, then select **Salesforce Settings**.
- Set up access to the Salesforce mobile web for external users in your community. On each external user record, select **Mobile User**. (When the mobile web is enabled for your internal org, only internal users are automatically assigned the **Mobile User** setting.)

  Without this setting, community members must append `/one/one.app` to the community URL (for example, `https://universaltelco.force.com/customer/one/one.app`) to access the community via Salesforce mobile web.
- Allow community access via the Salesforce for Android and Salesforce for iOS by granting the "API Enabled" profile permission to external users with communities licenses.

Salesforce Tabs + Visualforce Communities

Communities that use the Salesforce Tabs + Visualforce template are supported in all versions of the Salesforce app. Internal users use the switcher at the top of the app navigation menu to access their communities. External users see this menu when they belong to

multiple communities and can use it to switch between communities. This switcher automatically populates with the communities the user has access to, so no additional setup is required.



Type of User	Salesforce Mobile Web	Salesforce for iOS	Salesforce for Android
Users with standard Salesforce licenses Internal org users who are also in a community	Log in to Salesforce from a supported mobile browser. Then use the switcher at the top of the navigation menu and select a community.	Log in to the app. Use the switcher at the top of the navigation menu and select a community.	Log in to the app. Use the switcher at the top of the navigation menu and select a community.
External users with the following community licenses: • Customer Community • Customer Community Plus • Partner Community • Customer Portal • Partner Portal • High-Volume Portal User • Lightning External Apps • Lightning External Apps Plus	Navigate to the community URL and log in with the community credentials. If the community URL doesn't contain `one/one.app`, append it to the URL.	On the Salesforce app login screen, tap . Add the community as a new connection, using the community URL for the host name: (`<domainname>.force.com/<path-prefix>`). Then, select the community connection and log in with the community credentials.	On the Salesforce app login screen, tap . Add the community as a new connection, using the community URL for the host name: (`<domainname>.force.com/<path-prefix>`). Then, select the community connection and log in with the community credentials.
Unlicensed users (also known as guest users)	Navigate to the community URL. Guest users can only access public community content that doesn't require them to log in.	Not supported	Not supported

Lightning Communities

Lightning communities aren't supported in the Salesforce app because their styling doesn't display well. These communities are mobile-responsive and it's best to access them directly from a supported mobile browser using the community URL.

Community Management, Community Workspaces, and Community Builder

Community Management and Community Workspaces aren't available. We recommend that you use the supported browsers on desktop computers to make customizations in Community Management, Community Workspaces, and Community Builder.

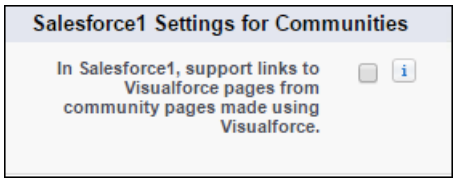
IN THIS SECTION:

Salesforce App Settings for Communities
Easily link to Visualforce pages from other Visualforce pages in the Salesforce app by selecting the checkbox under **Salesforce Settings for Communities** in Communities Settings.

Salesforce App Settings for Communities

Easily link to Visualforce pages from other Visualforce pages in the Salesforce app by selecting the checkbox under **Salesforce Settings for Communities** in Communities Settings.

Example:



Note: The setting keeps the Apex prefix in all your community URLs.

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit Communities settings:
- Customize Application

Lightning Communities Limitations

Be aware of the limitations that apply to Lightning communities such as Customer Service and Partner Central.

General Limitations

- Lookup fields aren't supported for custom objects or in template-based communities created before Spring '16.
- When Lightning communities users save an opportunity, they're not prompted to add products, even when the **Prompt users to add products to opportunities** setting is enabled. Only users in communities built with Salesforce Tabs + Visualforce are prompted to add products.
- In multilingual communities, the login page for the community appears in the default language for the community. To create login pages in other languages, use custom Visualforce pages.
- Google reCAPTCHA only works when access to Google web traffic is allowed. Causes for these disruptions vary, and can include network outages or government-mandated blocks. If a large percentage of your community is blocked from Google web traffic, consider requiring users to log in to post to the community.
- The Create New option for lookups isn't supported in Customer Service communities. Also, only external users (not guest users) can access asset lookup fields.
- For templates that use data categories, like Koa and Kokua, only one category group can be active at a time. Each group can have a maximum of five hierarchy levels in each group.

Note: The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

- For guest users, case validation doesn't run when cases are submitted through the Contact Support component. Validation runs once the submission is processed in the queue. Salesforce recommends writing custom client-side validation or writing custom Apex before inserting triggers to sanitize the case content.
- Partner and customer users can't be added to account teams.

Partner Communities

- Partner Central doesn't support the language picker.
- To protect your sales data, we disable guest user access for the navigation menu in Partner Central by default.
- Partner Central doesn't provide out-of-the-box self-service customer support features, such as navigational topics, articles, and the search publisher. To extend support to your partners, consider exposing cases in your community and creating a quick action button for creating cases.
- You can't export communities built on Partner Central as Lightning Bolt solutions. You can export individual pages, but not the entire community.

Browser Limitations

- Mobile devices using the BlackBerry or Microsoft Windows operating systems aren't supported.
- Internet Explorer versions before 11 aren't supported. We've created a page that automatically lets your users know that they must either upgrade or use a newer browser.

  You can also redirect to your own page that informs users that those browsers aren't supported. Create a file such as *ieRedirect.js* and include it in the header script section of the Site.com page. Make sure that the file contains the following code:

```
if (window.attachEvent && !window.addEventListener) {
 window.location = '<your redirect page>';
}
```

- Only the latest versions of Chrome, Firefox, and Safari (on Mac OS) are supported.

Note: Customers accessing your Lightning communities from unsupported browsers receive a warning that site features may not work as intended and are directed to use a different or updated browser for the best experience. They can still choose, after the warning, to use the site with their current browser and reduced effectiveness, if they want. For the list of Salesforce supported browsers, see Browser Support for Communities on page 8.

Communities Usage Allocation

Communities usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your communities. Salesforce provides tools to help you monitor communities usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Edition	Bandwidth Allocation (per rolling 24-hour period per community)	Service Request Time (per rolling 24-hour period per site)	Maximum Page Views
Developer Edition	500 MB	10 minutes	N/A
Enterprise Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	500,000
Unlimited Edition Performance Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	1,000,000

Bandwidth

The number of megabytes served and received from both the community's origin server and the cache server. The origin server refers to the Web server that hosts your community site. The cache server refers to the CDN server that serves your cache community site pages. This allocation is only calculated for non-authenticated community users."Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Service Request Time

The total server time in minutes required to generate pages for the community. This allocation is only calculated for non-authenticated community users.

"Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Page View

A request from a non-authenticated community user to load a page associated with your community. Requests from authenticated community users are not counted as page views. Cached page views are also counted.

Requests that Count as Page Views

Requests for the following *are* counted as page views:

Requests for...	Example
Your community domain	`http://mycommunity.force.com`
Your custom community web address	`http://community.mycompany.com`

Any page associated with your community	`http://mycommunity.force.com/mypage`
	`http://mycommunity.force.com/s/mypage`
	`http://community.mycompany.com/mypage`
	http://community.mycompany.com/s/mypage

Requests for...	Example
Custom login pages	

Requests that Do Not Count as Page Views

Requests for the following are ***not*** counted as page views:

Requests for...	Example
Authorization Required error page	`http://mycommunity.force.com/unauthorized`
AJAX requests: • JavaScript remoting • Visualforce	• Apex: RemoteAction • Visualforce: <apex:actionFunction>
Resources loaded on the page, such as `robots.txt` or the favorite icon	`http://mycommunity.force.com/robot.txt` `http://community.mycompany.com/favicon`
Attachments and documents	
Error pages, apart from Authorization Required, such as Limit Exceeded and Maintenance	`http://mycommunity.force.com/BandwithExceeded`
Tab clicks within a page	
Images included in an HTML field	`http://mycommunity.force.com/servlet/rtaImage`
Custom file field	`http://mycommunity.force.com/servlet/fileField`
System pages associated with your community, such as the login, logout confirmation, and forgot password pages	`http://community.mycompany.com/login` `https://community.mycompany.com/s/login`
API REST calls	`http://mycommunity.force.com/Service/apexrest`

Page View Allocations

The following table lists community page view allocations for each edition. This allocation applies to all the communities in your org.

Edition	Maximum Number of Communities	Maximum Page Views
Enterprise Edition	100	500,000/month
Unlimited Edition Performance Edition	100	1,000,000/month

A few things to bear in mind with page view allocation:

- Your org's page view entitlement is the sum of page views included in the edition plus any additional page views purchased from Salesforce.
- Salesforce calculates page view overages by looking at a 12-month look-back period. If your community page views exceed the org allocation for page views, contact Salesforce to understand how to buy overages. Community members and unauthorized users can still access your community, even if your org goes over its page view allocation.

Let's look at Acme Enterprises, which has set up a customer community. Their Enterprise Edition org includes 500,000 page views per month. Acme expects its community to take off, so they purchase another 500,000 page views per month. Their total page view entitlement is 1 million page views per month. So, over the course of a 12-month look back period, Acme's community can have 12 million page views (that's 12 x 1 million page view allocation).

The community has a spike in usage for a month, and goes over its 1 million allocation. Is Acme charged an overage? No, because the next month the community has fewer than 1 million page views. It all averages out when the calculation is made at the end of the 12-month look back period. In short, the community has to average 1 million page views per month over the course of a 12-month look back period to remain below its allocation.

Monitoring Usage

Accurately monitor your community's page view usage with the Page Views - Monthly Trend report, found in Community Management Package for Communities from the AppExchange. Install the package that is right for your communities:

- Community Management Package for Communities with Chatter
- Community Management Package for Communities without Chatter

You can also see page view usage in your org's Company Information section. In Setup, enter `Company Information` in the **Quick Find** box and click **Company Information**.

Note: The page view allocation found under Usage-Based Entitlement may not reflect the correct allocation for your Salesforce edition.

API Usage Allocation in Communities

Communities API usage limits listed here are in addition to your Salesforce org's API limits.

	Customer Community	Customer Community Plus	Partner Community	Lightning Platform Starter	Lightning Platform Plus
API Calls per Day	0	200 per member (member-based license) 10 per member (login-based license)	200 per member (member-based license) 10 per member (login-based license)	200 per member for Enterprise Edition orgs 200 per member for Unlimited Edition orgs	1000 per member for Enterprise Edition orgs 5000 per member for Unlimited Edition orgs

Setting Up a Community

Setting up a community includes a series of tasks that you must perform in Salesforce setup and in the community itself. From enabling communities to setting up user profiles for community membership and designing your community, we've got you covered!

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Enable Salesforce Communities

Enabling Salesforce Communities is the first step to creating communities.

Manage Your Community with Community Workspaces

Community Workspaces is your one-stop shop for building, setting up, and monitoring your community. You can access the Community Builder and Administration workspaces to manage your community's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Update Org-Wide Community Settings

Update org-wide settings for objects, sharing rules, roles, and permissions that affect community users as well.

Community Setup Basics

Setting up a community involves adding members, defining what records are shown in your community and to whom, branding, and enabling other features such as SEO.

Customize Login, Self-Registration, and Password Management for Your Community

Configure the default login, logout, password management, and self-registration options for your community. Or customize the behavior with Apex and Visualforce or Community Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

Deploy a Community from Sandbox to Production

We recommend creating, customizing, and testing your community in a test environment first, before you deploy it to your production org.

Enable Salesforce Communities

Enabling Salesforce Communities is the first step to creating communities.

Note: After you enable Communities, you can't disable it.

If your org's access to Communities is suspended for non-payment, all your communities are deactivated, including the communities in Preview. When Communities is reenabled, all communities are inactive. You can activate these communities, but you can't return to the Preview state.

1. From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**.

   Note: If you don't see this menu, Communities might not be available for your Salesforce org. Contact your Salesforce account executive.

2. Select **Enable communities**.
3. Select a domain name for your communities, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name. The Communities domain name is the same for all communities. You create a unique URL for each community when creating it by entering a unique name at the end of the URL. For example, if your Communities domain name is `UniversalTelco.force.com` and you're creating a customer community, you can enter *customers* to create the unique URL `UniversalTelco.force.com/customers`.

   Important: You can't change the domain name after you save it.

   You can designate a custom domain by entering it in on the Domain Management page. From Setup, enter *Domains* in the Quick Find box, then select **Domains**.

4. Click **Save**.

If you have the Create and Set Up Communities permission, you can now create communities.

- In Lightning communities and Lightning Experience, the App Launcher lets members switch between their Salesforce org and communities that they're a member of. By default, the App Launcher is hidden in existing communities and displayed in new communities.
- In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets users switch between their Salesforce org and communities that they're a member of.

SEE ALSO:

Can I use the same domain name for my Salesforce Sites and my Communities?

Community Settings

Who Can See What in Communities

Enable the Global Header for Communities

Enable the App Launcher in Lightning Communities

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Communities:

- Customize Application

Manage Your Community with Community Workspaces

Community Workspaces is your one-stop shop for building, setting up, and monitoring your community. You can access the Community Builder and Administration workspaces to manage your community's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Note: You can customize your community at any time, but if you plan on making major changes, we recommend deactivating the community first.

To enable Community Workspaces, in Setup, enter *Communities Settings* in the Quick Find box. Under Community Management Settings, select **Enable Community Workspaces**. Community Workspaces is enabled by default for all communities created after Spring '17.

To go back to Community Manager, in Setup, enter *Communities Settings* in the Quick Find box. Under Community Management Settings, deselect **Enable Community Workspaces**.

Important: The options available in Community Workspaces are based on your community template selection and preferences. That's why some options in the following list might not appear in your community. To display all sections, go to **Administration** > **Preferences**, and select **Show all settings in Community Workspaces**.

Community Workspaces includes the following workspaces.

Builder

Community Builder lets you brand and design your community pages. Create and customize pages, modify or add Lightning components, customize the community's navigation menu, and manage page-level settings.

Moderation

From the Home tab in Moderation, view your community's home page dashboard and reports for flagged posts, comments, messages, and files. From the Rules tab, administrators can set up moderation rules and content criteria for the community.

Note: If your home page still displays a message to install the Salesforce Communities Management package, your administrator hasn't mapped a dashboard yet.

Content Targeting

Manage your community's Topics and Recommendations from the Content Targeting workspace. Create a navigation menu and showcase popular topics in your community from the Topics tab. Drive community engagement from the Recommendations tab.

Dashboards

View dashboards and reports for your community. The administrator sets up dashboards that display in the Reporting tabs. Monitor activity and take immediate action in your community from the Engagement tab using Insights.

CMS Connect

Connect your content management system (CMS) to your community. Dynamically render headers, footers, banners, CSS, JavaScript, and other CMS content on your community pages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To access moderation rules and criteria:

- Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To customize administration settings or use Community Builder:

- Create and Set Up Communities
- AND is a member of the community

Administration

From the Administration workspace, you can update the basic setup of your community. Configure preferences, manage community membership, and select branding properties to apply. Set up reputation levels and points to reward members for activity in the community feed.

Guided Setup

Configure features with Guided Setup. It walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. Each setup step gives easy-to-follow directions and navigable links to setup pages.

Important: If you're an administrator and accidentally remove yourself from a community, you can't access the Administration settings in Community Workspaces. To add yourself back to the community or make other membership updates, use the API.

Note: If you set clickjack protection for your community site to the level for the most protection, pages in some workspaces, including Administration, appear as blank pages. To avoid this problem, use the recommended setting. If you encounter this issue, in Setup, enter `Custom URLs` in the Quick Find box, and select **Custom URLs**. Click the label for the Community (not the Site.com Community link), and reset the clickjack protection level to the recommended setting.

IN THIS SECTION:

Access Community Workspaces

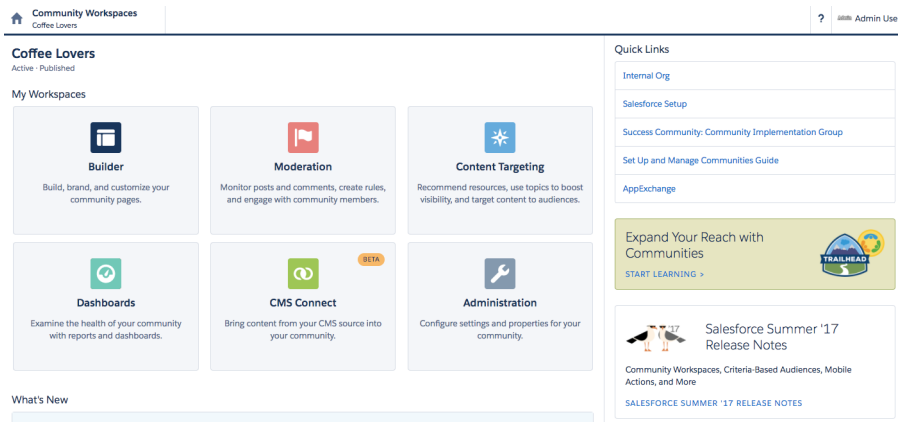
The streamlined Community Workspaces centralizes community moderation, building, and administration. Access Community Builder, administration, dashboards, and other features from one place.

Access Community Workspaces

The streamlined Community Workspaces centralizes community moderation, building, and administration. Access Community Builder, administration, dashboards, and other features from one place.

1. From Setup, enter *Communities Settings* in the Quick Find box, then click **Communities Settings**.
2. Enable Community Workspaces under Community Management Settings. Click **Save**.
3. From Setup, enter *All Communities* in the Quick Find box, then click **All Communities**. To access a community's workspace area, click **Workspaces** next to its name.

Example:



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To access moderation rules and criteria:

- Manage Communities OR Create and Set Up Communities

To customize administration settings or use Community Builder:

- Create and Set Up Communities

Update Org-Wide Community Settings

Update org-wide settings for objects, sharing rules, roles, and permissions that affect community users as well.

IN THIS SECTION:

Community Settings

Update general settings to control access and sharing for external users in your communities.

Set the Default Number of Community Roles

Set the default number of roles created when adding partner or customer accounts to communities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Custom Community Roles

Community members are typically assigned the role of partner, customer, or employee. However, you can create custom roles that replace standard ones. You can also choose to display the member's company name in place of a role.

Enable Super User Access for Your Communities

When you enable super user access, you can grant super user access to partner users in communities. Super user access allows partner users to view the data of other users with the same role in the partner role hierarchy.

Enable Report Options for External Users

Allow external users with Partner Community or Customer Community Plus licenses with the "Run Reports" permission, to view and modify report options so that they can summarize and filter reports.

Allow Customers to Change Case Statuses

Let customer users change case statuses in communities. This functionality is available only for users with the Customer Community Plus license.

Customer Portal Users

About High-Volume Community Users

High-volume community users are limited-access users intended for orgs that have thousands to millions of communities users.

Giving Access to Records Using Sharing Sets

Use sharing sets to grant portal or community users access to records that are associated with their accounts or contacts.

Use Share Groups to Share Records Owned by High-Volume Community Users

Share groups allow you to share records owned by high-volume community and portal users with internal and external users.

Community Settings

Update general settings to control access and sharing for external users in your communities.

- Set the default number of roles created when a partner account is enabled
- Enable super user access for external users
- Set up sharing sets for high volume community users
- Enable report options for external users
- Let customer users change case statuses
- Enable linking between Visualforce pages in a community on the Salesforce app

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit Communities settings:

- Customize Application

Set the Default Number of Community Roles

Set the default number of roles created when adding partner or customer accounts to communities.

These settings apply if your community is set up with Partner Community, Customer Community Plus, or Lightning External Apps Plus user licenses. The limit is three roles; the system default is one. For example, if three partner roles are currently created when an account is enabled for your community–Executive, Manager, and User–but you need only the User role for new accounts, you can reduce the number to one role.

Note: For better performance, we recommend setting this value to `1`. You can then use Super User Access to grant specific users access to data owned by other users in their account.

1. From Setup, enter `Communities Settings` in the Quick Find box, then select **Communities Settings**.
2. Select the number of roles per account.
   a. If you're using Partner Community licenses, set the **Number of partner roles**.
   b. If you're using Customer Community Plus licenses, set the **Number of customer roles**.
3. Click **Save**.

This setting does not affect the number of roles for existing accounts.

SEE ALSO:

Community Settings
Communities User Licenses
Enable Super User Access for Your Communities

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set the number of default roles:
- Customize Application

Set Custom Community Roles

Community members are typically assigned the role of partner, customer, or employee. However, you can create custom roles that replace standard ones. You can also choose to display the member's company name in place of a role.

Creating custom role names is done simply through member administration in community management. Using a company name instead of a role is simpler yet: just turn on the **Show Company Name as Community Role** permission enabled. If the permission is off, users may see the company name elsewhere, such as on a member's profile, but not in place of the role.

To create custom roles for communities:

1. In Setup, search for Communities in the **Quick Find** box and select **All Communities**.
2. Open Community Workspaces or Community Management.
3. Under **Administration**, click **Members**.
4. Under **Community Role**, select **Custom**.
5. Enter the new name you want to use instead of the role name. You can replace any or all of the names. You can even remove a role by deleting the role name.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Enable Super User Access for Your Communities

When you enable super user access, you can grant super user access to partner users in communities. Super user access allows partner users to view the data of other users with the same role in the partner role hierarchy.

You can grant super user access to anyone with a Partner Community or a Customer Community Plus license.

Granting super user access to external users in your community lets them access more data and records, regardless of sharing rules and organization-wide defaults. Super users can access data owned by other partner users who have the same role or a role below them. Super user access applies to cases, leads, custom objects, and opportunities only. External users have access to these objects only if you expose them using profiles or sharing and add the tabs to the community.

1. From Setup, enter `Communities Settings` in the **Quick Find** box, then select **Communities Settings**.
2. Select **Enable Partner Super User Access**.
3. Click **Save**.

Next, assign super user access to individual users.

To disable super user access, deselect **Enable Partner Super User Access**. If you re-enable this feature, all users who were assigned super user access previously get super user access again.

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Super User Access:
- Customize Application

IN THIS SECTION:

Grant Super User Access to Customer Users in Your Community
Enable super user access so that external users in communities can access more records and data.

SEE ALSO:

Grant Super User Access to a Partner User
Grant Super User Access to Customer Users in Your Community
Community Settings

Grant Super User Access to Customer Users in Your Community

Enable super user access so that external users in communities can access more records and data.

You can grant customer super user access to users with Partner Community or Customer Community Plus licenses.

The "Portal Super User" permission lets you do the following on your accounts:

- View, edit, and transfer all cases
- Create cases for contacts
- View and edit all contacts, whether communities-related or not
- View account details when they're the contact on a case
- Report on all contacts, whether portal enabled or not, if the Reports tab is added to your community and the user has the "Run Reports" permission

Add the "Portal Super User" permission to a permission set and assign it to Customer Community Plus users so that they have access to their account and can view and edit all of its cases and contacts without having the ability to manage other external users.

Note: When Customer Community Plus users with the Portal Super User permission create contacts, the ownership of those contacts defaults to the channel manager associated with the user's account.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Either create or clone a permission set.
3. In the App Permissions section, add the "Portal Super User" permission.
4. Click **Save**.
5. Assign the permission set to your Customer Community Plus users by clicking **Manage Assignments** and then adding the appropriate users.

SEE ALSO:

Enable Super User Access for Your Communities

Grant Super User Access to a Partner User

Enable Report Options for External Users

Allow external users with Partner Community or Customer Community Plus licenses with the "Run Reports" permission, to view and modify report options so that they can summarize and filter reports.

1. From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**.
2. Select Enable report options for external users.
3. Click **Save**.

External users with Partner Community or Customer Community Plus licenses that have the "Run Reports" permission, now see report options on the run report page.

SEE ALSO:

Community Settings

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable report options for external users:

- Customize Application

Allow Customers to Change Case Statuses

Let customer users change case statuses in communities. This functionality is available only for users with the Customer Community Plus license.

1. From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**.
2. Select Allow customer users to change case statuses.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Customer Portal Users

Note: Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Community Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

If you're still working with the Customer Portal, see the Customer Portal Guide for more information.

Note: High-volume portal users are available for customer portals or communities intended for many thousands to millions of users. See About High-Volume Portal Users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

About High-Volume Community Users

High-volume community users are limited-access users intended for orgs that have thousands to millions of communities users.

Unlike other community users, high-volume community users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume community users include the Customer Community, High Volume Customer Portal, and Authenticated Website license types.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Characteristics

High-volume community users:

- Are contacts enabled to access a community.
- Are assigned to the Customer Community, High Volume Customer Portal, or Authenticated Website license.
- Only share the records they own with Salesforce users in sharing groups.

Access to Records

High-volume community users can access the following types of records, based on specific conditions:

- They can access their own account and contact records, based on implicit sharing.
- They have "Read" access on the account they belong to.
- They can access a record's parent, and the organization-wide sharing setting for that record is Controlled by Parent.
- The organization-wide sharing setting for the object is Public Read Only or Public Read/Write.

Admins can create sharing sets to grant high-volume community users additional access to records; see Set Up Sharing Sets.

Limitations

- High-volume community users can't manually share records they own or have access to.
- You can't transfer cases from non-high-volume community users to high-volume community users.
- High-volume community users can't own accounts.
- You can't add case teams to cases owned by high-volume community users.
- You can't include high-volume community users in:
  - Personal groups or public groups.
  - Sharing rules.
  - Account teams, opportunity teams, or case teams.
  - Salesforce CRM Content libraries.

  These limitations also apply to records owned by high-volume community users.
- You can't assign high-volume community users to territories.

SEE ALSO:

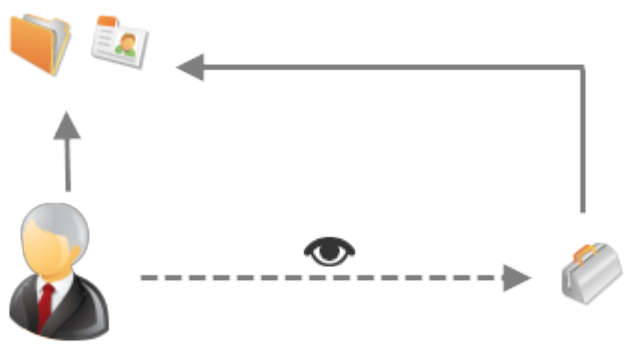
Use Share Groups to Share Records Owned by High-Volume Community Users

Giving Access to Records Using Sharing Sets

Use sharing sets to grant portal or community users access to records that are associated with their accounts or contacts.

Available in: Salesforce Classic and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Determine how access is granted using an access mapping in the sharing set. Access mappings support lookups from the user and target record to the account or contact. You can determine the objects to use in the access mapping, and they must both either point to an account or contact.



For example, you can use a sharing set if you would like to:

- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

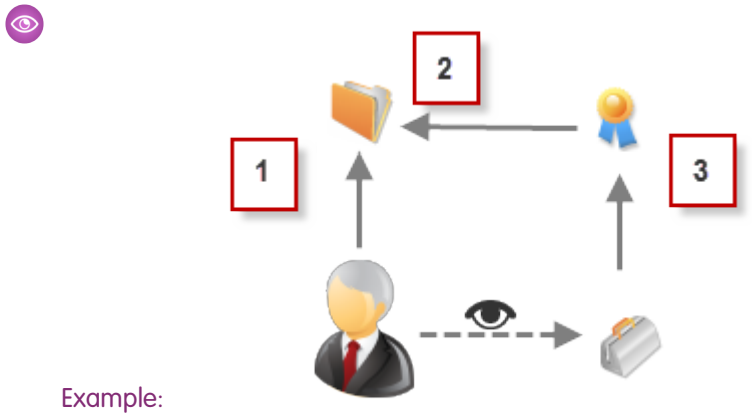
The following objects can be used with sharing sets:

- Account
  - Account sharing sets can control access to Contract, Entitlement, and OrderItem objects
- Asset
- Campaign
- Case
- Contact
- Custom Objects
- Individual
- Lead
- Opportunity
- Order
- ServiceAppointment
- Service Contract
- User
- Work Order

Sharing sets can be used with these user licenses:

- Authenticated Website
- Customer Community Login
- Customer Community Plus
- Partner Community
- Customer Community User
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website User
- Overage High Volume Customer Portal User

The following example shows an access mapping on a sharing set. This example grants portal or community users access to all cases associated with the entitlements on their account, even if they are not directly associated with the case.



Example:

1. Account lookup on portal or community user
2. Related account on entitlement
3. Entitlement lookup on case

Note: Portal or community users gain access to all order entitlements and order items under an account to which they have access. To share records owned by high-volume portal users, use a share group instead.

IN THIS SECTION:

Set Up Sharing Sets

Grant community users access to records using sharing sets.

Set Up Sharing Sets

Grant community users access to records using sharing sets.

A sharing set grants community or portal users access to any record associated with an account or contact that matches the user's account or contact. You can also grant access to records via access mapping in a sharing set. Access mappings support indirect lookups from the user and target record to the account or contact. For example, grant community or portal users access to all cases related to an account that's identified on the users' contact records.

Sharing sets apply across all communities that a community user is a member of. For more information, see "Giving Access to Records Using Sharing Sets".

1. From Setup, enter `Communities Settings` in the Quick Find box, then select **Communities Settings**.
2. In the Sharing Sets related list, click **New** to create a sharing set, or click **Edit** to edit an existing sharing set.
3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or update sharing sets:

- Customize Application

6. Select the objects you want to grant access to.

   The following objects can be used with sharing sets:

   - Account
     - Account sharing sets can control access to Contract, Entitlement, and OrderItem objects
   - Asset
   - Campaign
   - Case
   - Contact
   - Custom Objects
   - Individual
   - Lead
   - Opportunity
   - Order
   - ServiceAppointment
   - Service Contract
   - User
   - Work Order

   The Available Objects list excludes:

   - Objects with an organization-wide sharing setting of Public Read/Write
   - Custom objects that don't have an account or contact lookup field

7. In the Configure Access section, click **Set Up** or **Edit** next to an object name to configure access for the selected profiles, or click **Del** to remove access settings for an object.

   Note: Objects with **Set Up** in the Action column aren't configured for high-volume user access. Until you configure an object, high-volume users have limited or no access to its records.

8. Grant access based on an account or contact lookup:

   - Select a value in the User dropdown list to determine the account or contact lookup on the user.
   - Select a value in the Target Object field to determine the account or contact lookup on the target object.

   For example, to grant access to all cases associated with an account identified on the user's contact record, select `Contact.Account` and `Account` respectively.

   Note: Both selected fields must point to either an account or contact. For example, `Contact.Account` and `Entitlement.Account` both point to an account.

9. Choose an access level of Read Only or Read/Write. (If the object's organization-wide sharing setting is Public Read Only, then only Read/Write is available.)

10. Click **Update**, then click **Save**.

After creating a sharing set, create share groups to give other users access to records created by high-volume community users.

Note: Access granted to users via sharing sets does not roll up to users higher to them in their role hierarchies. Also, the share groups functionality isn't available to users with Customer Community Plus and Partner Community licenses.

SEE ALSO:

Community Settings

About High-Volume Community Users

Set Up Contacts to Multiple Accounts

Use Share Groups to Share Records Owned by High-Volume Community Users

Share groups allow you to share records owned by high-volume community and portal users with internal and external users.

High-volume users are limited-access community or portal users, intended for orgs with many thousands to millions of external users. Because high-volume users don't have roles, performance issues associated with role hierarchy calculations are eliminated. Use a share group to share records owned by high-volume community and portal users.

Share groups apply across communities or portals and are associated with sharing sets.

Let's look at a quick video that describes how share groups work: Who Sees What in Communities: Community-Specific Sharing.

To set up share groups for your communities:

1. From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**.
2. Click the name of the sharing set you want to associate your new share group.
3. Click the Share Group Settings tab.
4. Click **Activate** to turn on the share group.

   Activating the share group can take a while. An email is sent to you when the process finishes.

   Note: Deactivating a share group removes *all* other users' access to records owned by high-volume community or portal users. An email isn't sent to you when the deactivation process finishes.

5. Click **Edit** to add users to the share group. You can add both internal users from your organization as well as external users from the same parent account as the high-volume user.
   a. From the Search dropdown, select the type of member to add.
   b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
   c. Select members from the Available Members box, and click **Add** to add them to the group.
   d. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To share records owned by high-volume community users to other users:

- Customize Application

SEE ALSO:

Community Settings

About High-Volume Community Users

Set Up Sharing Sets

Community Setup Basics

Setting up a community involves adding members, defining what records are shown in your community and to whom, branding, and enabling other features such as SEO.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Sharing CRM Data in a Portal or Community

Sharing CRM data in a portal or community can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your portal or community.

Customize Communities

Update basic community settings like your community URL, community name, members, login options, and general preferences in the Administration section of Community Workspaces or Community Management.

Brand Your Community

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Workspaces or Community Management. You can add your own logo, colors, and copyright so that your community matches your company's branding and is instantly recognizable to your community members.

Enable Notifications in Lightning Communities

With Global Notifications, your members receive messages wherever they are working, whether in their communities or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Enable the App Launcher in Lightning Communities

Display the App Launcher in Lightning communities to make it easy for members to move between their communities and their Salesforce org. This functionality is available in any community based a Lightning community template or Lightning Bolt solution.

Enable the Global Header for Communities

In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets you switch between your communities and your Salesforce org.

Share a Link to Your Community

You can allow members to preview your community before making it active.

Update Your Community Settings

Manage your community name, description, community status, and community template all from one location.

Deactivate a Community

Enable Optional Community Features

Enable other optional features in your community such as user nicknames, guest access, private messages, direct messages, content flagging, and reputation levels.

Set Up SEO for Your Community

Have search engines, such as Google™ or Bing®, index your community so that customers, partners, and guest users can easily discover community pages via online searches. Search Engine Optimization (SEO) can significantly improve discovery for public communities.

Sharing CRM Data in a Portal or Community

Sharing CRM data in a portal or community can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your portal or community.

Before implementing your community or portal, familiarize yourself with how communities coexist in a Salesforce org. Check out these resources for more information:

- **Video:** Communities and Community Users in Your Salesforce Org
- **Trailhead Module:** Community Rollout Strategy

Another important concept is that the type of Community Cloud license your users have affects the types of sharing available to them. Based on the Community Cloud licensed used to access a community or portal, users have **standard** or **simple** sharing capabilities.

Standard sharing refers to all the sharing mechanisms available to internal Salesforce org users, plus various sharing mechanisms that come with Community Cloud licenses (sharing sets, share groups, super user access). Standard sharing is available to Customer Community Plus and Partner Community licenses.

Simple sharing means that users don't have access to roles and sharing via the role hierarchy, and is normally employed in communities and portals with a high volume of users. Simple sharing is available to Customer Community license holders. For more information about what's included in the various licenses, check out Communities User Licenses.

Resources for Sharing and Security
Org-Wide Defaults
Salesforce Org Resources • **Video** – Who Sees What: Organization Wide Defaults • **Salesforce Help** – Organization-Wide Sharing Defaults • **Trailhead** – Module: Data Security **Community-Specific Resources** • **Video** – Who Sees What in Communities: External Org-Wide Defaults • **Salesforce Help** – External Organization-Wide Defaults Overview • **Trailhead** – Share CRM Data with Your Partners
Account Roles and Role Hierarchies
Salesforce Org Resources • **Video** – Who Sees What: Record Access via Roles

Resources for Sharing and Security

- **Salesforce Help**
  - User Role Hierarchy
- **Trailhead**
  - Module: Data Security

Community-Specific Resources

- **Video**
  - Who Sees What in Communities: Accounts and Role Hierarchies
- **Salesforce Help**
  - Create Community Users
  - Set the Default Number of Community Roles
  - Sharing Data with Partner Users
- **Trailhead**
  - Share CRM Data with Your Partners

Sharing Rules

Salesforce Org Resources

- **Video**
  - Who Sees What: Record Access via Sharing Rules
- **Salesforce Help**
  - Sharing Rules
- **Trailhead**
  - Module: Data Security

Community-Specific Resources

- **Video**
  - Who Sees What in Communities: Sharing Rules
- **Trailhead**
  - Share CRM Data with Your Partners

Community-Specific Sharing

Community-Specific Resources

- **Video**
  - Who Sees What in Communities: Community-Specific Sharing
- **Salesforce Help**
  - Sharing Set Overview

Resources for Sharing and Security

- Use Sharing Sets in Communities
- Share Groups
- Super User Access

- **Trailhead**
  - Share CRM Data with Your Partners

Create Communities Users

USER PERMISSIONS

To create or edit partner users:	Manage External Users
To create or edit customer users:	Manage External Users OR Manage Customer Users Important: When creating customer users, the account that the new contact is associated with must have an account owner that is assigned a role.
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To log in as a partner or customer user:	Manage External Users OR Manage Customer Users Important: The Manage Customer Users permission is on by default for standard users created before Summer '18. AND Edit on Accounts Note: This permission is not needed if the person logging in has a higher role than the partner or customer user they are logging in as.

To allow an external user to access your community, add the user to an account as a contact record. Then enable the contact record as a customer user or partner user, depending on your business relationship.

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A few things to bear in mind about creating users.

- When you enable a contact record as an external user, you can assign a Partner Community, Customer Community, or Customer Community Plus license to them, depending on your business relationship.
- Only business accounts (and not person accounts) can be partner accounts, and you can use only partner accounts to create partner users.
- You can only configure the **Log in to Community as User** action on the contact layout using Lightning Experience. After you enable a partner or customer user in Salesforce Classic, **Log in to Community as User** is available on the contact record, even if it has been removed from the contact layout.

1. On the account record, view or add the contact record for the person you want to add to a community.
2. On the contact detail page, click **Manage External User**, then select **Enable Partner User** or **Enable Customer User**.

   This option creates a user record in your Salesforce org with some details prepopulated from the contact record.

   Note:
   - To access the Manage External User button in Lightning Experience, add it to the Account and Contact page layouts. Go to **Contact** actions and add the Manage External User action to the Salesforce Mobile and Lightning Experience Actions section of the layout.
   - If you don't see the Enable Partner User or Enable Customer User buttons, ask your administrator to check whether they're included in the Contact page layout. If the buttons are included, ensure that your org has customer or partner community licenses available.

3. Edit the user record for this external user and assign the appropriate user license: Partner Community for partners and Customer Community or Customer Community Plus for customer users.
4. Select the appropriate profile and role for the partner or customer user.

   Note: Make sure that you choose a profile that has the appropriate tabs exposed. Also, each customer or partner account has a role hierarchy associated with it. All customer and partner user roles roll up to the account owner.

5. If you haven't activated the community to add the external user to, deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated.
   - If you opt to notify the user immediately but the user is not a member of any active community, Salesforce doesn't send the email.
   - You can send a welcome email with the login information by selecting the **Send welcome email** option when you activate a community.
   - If you don't send a welcome email when you activate the community, you must manually send this information to the user.
6. Click **Save**.

- Customer or partner users can't directly log in to Salesforce; they must use a community to access your Salesforce data. To add a customer or partner user to a community, add their user profiles to a community.
- Customer Users don't see the Notes & Attachments related list on accounts or contacts.
- Community Users can't own community-enabled accounts.
- Creating an external user with a Customer Community Plus license is similar to creating a partner user. On the contact record, click **Manage External User**, and select **Enable Partner User**. Also, when editing the user record, select the Partner Community User profile or a profile cloned from it.
- To troubleshoot issues or ensure that the community is configured appropriately, on the contact detail page, click **Manage External User**, and select **Log in As Partner User** or **Log in as Customer User**. Unless you have a higher role than the partner or customer

user that you are logging in as, you must have Edit permission on Accounts to log in as a partner or customer user. A new browser window opens, and you are logged in to the community on behalf of the external user.

- When you log in as an external user, you see the behavior that the external user sees. For instance, external users see only the community dropdown menu if they have access to more than one active community. If external users have access to only one active community and they view another community in preview, the users don't see the dropdown menu in the preview community.
- When logged in as another user, an admin or support user can't authorize OAuth data access for the user. For example, if an admin logs in as another user, the admin can't authorize OAuth access for third-party applications to user accounts. This restriction includes single sign-on.

  Note: When two-factor authentication is enabled for a community, admins can't use the login as feature to access the community. See Set Two-Factor Authentication Login Requirements and Custom Policies for Single Sign-On, Social Sign-On, and Communities.

- External users can't be deleted. If you no longer want an external user to have access to a community, deactivate the user.

Check out Communities and Community Users in Your Salesforce Org, a quick video about how communities live in an org, the differences between community licenses, and how Salesforce accounts and community users are associated with one another.

Take a few minutes to see how users, roles, and accounts are related in this video, titled Who Sees What in Communities: Accounts and Role Hierarchies.

SEE ALSO:

Delegate External User Administration
Add Members to Your Community
How do external community members get login information?
Reset An External User's Password for Communities
Communities User Licenses
Upgrade Community User Licenses
Partner User Roles
Customize Email Sent from Communities for Email Verification

Upgrade Community User Licenses

Upgrading a community or portal user user's license allows you to give them access to more data within your community. With the right combination of permissions via the user's new license, profile, role, and permission sets, you can preserve the user's record and Chatter history.

Before you upgrade a user's license:

- Enable communities in your org.
- Review which user licenses can be upgraded.
- Explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should ideally provide at least the same or comparable level of data access as previous assignments.
- The Customer Community Plus and Partner Community licenses require the user to have a role, which imposes a few restrictions.
  - ***An upgrade to a license that requires a role is irreversible.***
  - If the account does have roles and you don't specify one, we associate the user with the lowest role in the hierarchy: Partner <Account Name> User or Customer <Account Name> User.
  - If the user belongs to an account that doesn't have roles, we create one for you.
- Before upgrading a user to the Partner Community license, enable the user's account as a partner account. A partner account can be associated with both customer and partner users, so customer users on the same account aren't affected.
- A license upgrade automatically removes sharing sets, permission sets, and permission set license assignments previously associated with the user.
- License upgrades are subject to most limits that apply to new users, such as the maximum number of licenses and roles in your org, username uniqueness requirements, and so on.

You can upgrade most customer user licenses to either the Customer Community Plus or the Partner Community license.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Click **Edit** next to the user you want to upgrade.
3. Select the new license, profile, and role for the user.
4. Optionally, specify a new profile and role.

   Note: If the account the user belongs to has no roles, we create one behind the scenes and assign the lowest role that exists in the hierarchy. If the account does have roles, you must choose one and assign the lowest role that exists in the hierarchy.
5. Save your changes.

After you upgrade a user's license, bear in mind that:

- Changes in profiles and permission sets might affect community membership. Ensure that upgraded users have access to the intended communities.
- We recalculate sharing rules that apply to the upgraded user, for example through their public groups, criteria-based sharing, and record ownership (implicit sharing).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or edit customer users:
- Manage External Users

  OR

  Edit Self-Service Users

To create, edit, and delete profiles:
- "Manage Profiles and Permission Sets"

To log in as a partner or customer user:
- Manage External Users

  OR

  Edit Self-Service Users

  Important: The Edit Self-Service Users permission is on by default for standard users.

  AND

  Edit on Accounts

To allow portal users to upgrade to Partner or Customer licenses:
- "Allow LitePortalUser Upgrade"

- Users upgraded to the Customer Community Plus are automatically associated with the All Customer Portal Users public group. Similarly, users upgraded to the Partner Community licenses are associated with the All Partner Users public group.

SEE ALSO:

Communities User Licenses

Communities Licenses Eligible for Upgrades

Communities Licenses Eligible for Upgrades

In general, we support upgrades from most customer licenses to the Customer Community Plus or Partner Community licenses. Specifically, we support license upgrades for all users where their `UserType` equals `CSPLitePortal` (in the Salesforce API) to `PowerPartner` or `PowerCustomerSuccess`.

You can upgrade the following licenses to the Customer Community Plus or Partner Community License.

- Customer Community
- External Identity
- High Volume Customer Portal
- Overage High Volume Customer Portal
- Authenticated Website User Overage
- Authenticated Website User

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

There are other customer licenses associated with the `CSPLitePortal` user type that support license upgrades, but with some loss of data access. For example, the user may lose access to some objects they previously had access to, or the new license might not include one or more user permissions available with the previous license.

Warning: *We strongly recommend that you explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should provide at least the same or comparable level of data access as previous assignments.*

License Conversion and Upgrade Compatibility

Original license	Convert to...		
	Customer Community (Named User or Login Based)	**Customer Community Plus (Named User or Login Based)**	**Partner Community (Named User or Login Based)**
Partner Gold Partner Silver Partner Bronze Partner	⊘ Switching from a partner portal license to a Customer Community license would result in a loss in functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a partner portal license to a Customer Community Plus license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	✓ An administrator can change the license type and profile on the user record.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	**Customer Community Plus (Named User or Login Based)**	**Partner Community (Named User or Login Based)**
Customer Portal Manager Custom Customer Portal Manager Standard Overage Customer Portal Manager Custom Overage Customer Portal Manager Standard	⊘ Switching from a customer portal license to a Customer Community license would result in a loss in functionality. An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.	✓ An administrator can convert a Customer Portal Manager Custom, Customer Portal Manager Standard, Overage Customer Portal Manager Custom, or Overage Customer Portal Manager Standard license (for a named user) to a Customer Community Plus license and vice versa, by changing the license type and profile on user record.	⊘ An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
External Identity High Volume Customer Portal Overage High Volume Customer Portal Authenticated Website User Overage Authenticated Website User	✓ An administrator can change the license type and profile on the user record.	✓ An administrator can change the license type and profile on the user record.	✓ An administrator can change the license type and profile on the user record.
Customer Community	✓ An administrator can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	✓ An administrator can change the license type and profile on the user record.	✓ An administrator can change the license type and profile on the user record.
Customer Community Plus	⊘ Switching from a Customer Community Plus license to a Customer Community license would result in a loss in functionality. An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new	✓ An administrator can convert a Customer Community Plus license (for a named user) to a Customer Community Plus Login license and vice versa, by changing the license type and profile on user record.	⊘ An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	**Customer Community Plus (Named User or Login Based)**	**Partner Community (Named User or Login Based)**
	user record and associate it with the new license.		
Partner Community	⊘ Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	✓ An administrator can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.
Lightning External Apps	✓ An administrator can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	✓ An administrator can change the license type and profile on the user record.	✓ An administrator can change the license type and profile on the user record.
Lightning External Apps Plus	⊘ Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An administrator must disable the contact as a Partner User and re-enable as a Customer User.	✓ An administrator can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.

To upgrade users with other license types, you must deactivate them, create new user identities for them, migrate their data over, and associate it with their new user records. For detailed instructions, see User License Conversions in the *Migrating from Portals to Communities* guide.

Migrate Community Users Between Licenses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You can move community users between certain licenses using Data Loader. For example, you can migrate users between the Customer Community Member and Customer Community Login licenses. Before moving a user to another license, set up a profile for the new license type you are moving the user to.

Migrating users to different licenses applies to the following scenarios.

- Between the Customer or Partner Community and Customer Community Login or Partner Community Login licenses
- Between the Customer Portal or Partner Portal and Customer Community or Partner Community licenses

  Note: Making this change results in admin work and requires the creation of a new user record.

- Between the Customer Community and Customer Community Plus licenses

  Note: Make sure that you want to give Customer Community users the more advanced sharing options available to Customer Community Plus users.

Step 1: Export the User Report

1. Log in to Data Loader.
2. Click **Export**.
3. Click **Next**.
4. Select the **User (User)** object.
5. For the extraction target, enter *users.csv*.
6. Click **Next**.
7. Select the query fields **Id** and **ProfileId**.
   a. For Fields, select **IsActive**.
   b. For Operator, enter *equals*.
   c. For Value, enter *true*.
   d. Click **Add Condition**.
8. Add another condition.
   a. For Fields, select **AccountId**.
   b. For Operator, enter *not equals*.
   c. Leave Value blank.
   d. Click **Add Condition**.
9. The generated query is `Select Id, ProfileId FROM User WHERE IsActive = true AND IsActive = true AND AccountId = 'null'`.

   Note: You can copy and paste the query from this step.

10. Click **Finish**.
11. Click **Yes**.

Step 2: Query Permission Set IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Select the **Permission Set (PermissionSet)** object.
5. For the extraction target, enter *permissionsets.csv*.
6. Click **Next**.
7. Choose the query fields **Label** and **Id**.
8. The generated query is `SELECT Label,Id FROM PermissionSet`.

   Note: You can copy and paste the query from this step.

9. Click **Extract**.
10. Click **OK**.

Step 3: Query the Permission Set Assignments

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Permission Set Assignments (PermissionSetAssignment)** object.
6. For the extraction target, enter *permissionsetassignment.csv*.
7. Click **Next**.
8. Copy the following query from this Help topic and paste it into the generated query box: `SELECT AssigneeId,Id,PermissionSetId FROM PermissionSetAssignment WHERE Assignee.UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal')`.

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your query needs.

9. Click **Finish**.
10. Click **Yes**.

Step 4: Query Profile IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Profile (Profile)** object.
6. For the extraction target, enter *profiles.csv*.
7. Click **Next**.

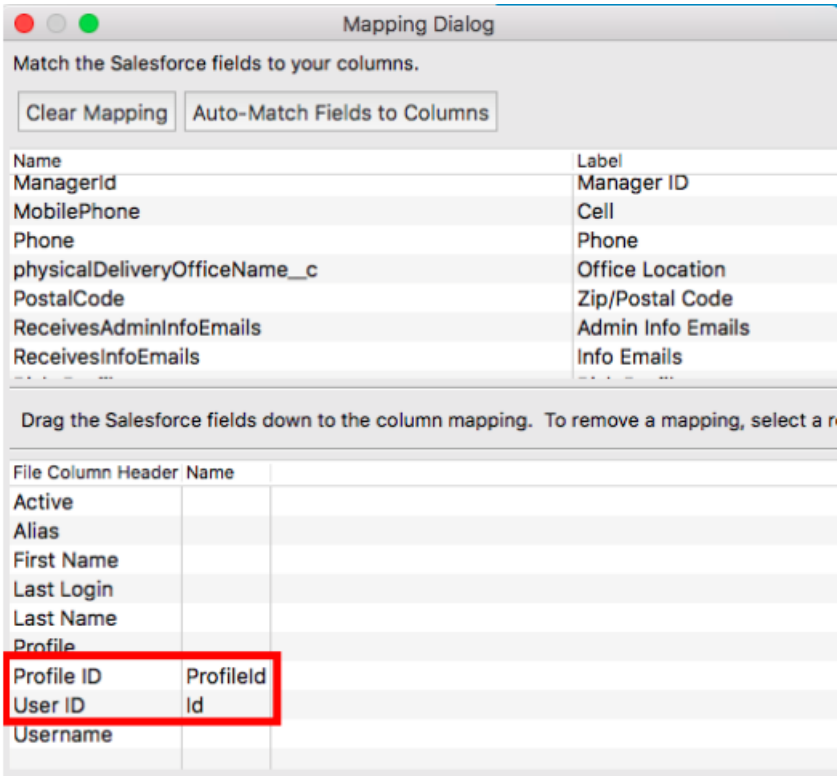
8. Copy the following query into the generated query box: `SELECT Name,UserLicense.Name,Id FROM Profile WHERE UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal')`.

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your needs.

9. Click **Finish**.
10. Click **Yes**.

Step 5: Update User Profiles

1. Open the `users.csv` file you created.
2. Rename the ProfileID column to *`OldProfileId`*.
3. Add a column named *`ProfileID`*.
4. In the new ProfileID column, add the profile ID that you want to move the user to using the `profiles.csv` file as your guide.
5. Save the `users.csv` file.
6. Open Data Loader, and click **Update**.
7. Select the **User (User)** Salesforce object.
8. Select the **users.csv** file.
9. Click **Next**.
10. Map the ProfileId field to the Profile ID column, and map the Id field to the User ID column.



Warning: This step deletes all permission set assignments for these users. Before performing these updates, make sure that you've saved the permissions to the `permissionsetassignment.csv` file. Otherwise, you lose all history of which permission sets your community users had.

11. Click **Next**.
12. Click **Finish**.

Step 5: Insert Permission Set Assignments

1. Open the `permissionsetassignment.csv` file.
2. Rename the PermissionSetId column to *`OldPermissionSetId`*.
3. Add a column named *`PermissionSetId`*.
4. In the new PermissionSetId column, add the permission set ID that you want to move the user to using the `permissionsetassignment.csv` file as your guide.
5. Save the `permissionsetassignment.csv` file.
6. Open Data Loader, and click **Insert**.
7. Select the **Permission Set Assignment (PermissionSetAssignment)** Salesforce object.
8. Select the **permissionsetassignment.csv** file.
9. Click **Next**.
10. Map the PermissionSetId field to the PermissionSetId column, and map the Id field to the User ID column.
11. Click **Next**.
12. Click **Finish**.

Communities License Limitations

Here are a few limitations related to communities licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- There are different requirements for username uniqueness depending on the type of license your community is using. Customer, Customer Community Plus, and Lightning External Apps Starter licenses require unique usernames within the Salesforce org that a community belongs to. Partner Community licenses, Employee Community, Lightning External Apps Plus licenses require unique usernames across all Salesforce orgs that the user belongs to.
- A user with a Partner Community license must be associated with a business account that is enabled as a partner account. Partner users can't be associated with person accounts.
- Users with community and portal licenses can't create or update email templates.
- Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing set support for the Contacts to Multiple Accounts feature is available as a pilot feature.
- Customer users with the following licenses can't update case statuses in communities built on the Salesforce Tabs + Visualforce template on desktop browsers. They can still update case statuses from Salesforce mobile web.
  - Customer Community
  - High Volume Portal User
  - Customer Portal

- Users with the Partner Community license can't access the Quotes tab in communities using the Salesforce Tabs + Visualforce template. They can view, modify, and update quotes according to their permissions from other locations in the UI, such as from opportunities.
- The **Enable notifications for communities** permission is read-only and cannot be changed for Partner Community profiles.

Person Account Communities User Limitations

A Salesforce user can be the owner of up to 50,000 person account portal users. This includes person account users with Customer Community Plus, Customer Portal, and other role-based portal licenses. Person account users with high volume portal licenses such as High Volume Customer Portal or Customer Community don't count against this limit. Users with partner portal or Partner Community licenses can't be person accounts users, so this limit doesn't apply.

You can't merge person accounts that are enabled to use portal or community users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create Communities

Create communities using a wizard that helps you choose a community template that meets your business needs.

To see the number of communities you can create for your org, from Setup, enter `All` in the Quick Find box, and select **All Communities**. The maximum number of communities appears at the top of the page.

1. To create a community, from Setup, enter `All` in the Quick Find box, select **All Communities**, and then click **New Community**.
   The Community Creation wizard opens with several templates for you to choose from. If you have Lightning Bolt solutions available in your org, they are listed in the wizard.
2. To see more information about a template, select it.

   Customer Account Portal
   A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.

   Partner Central
   A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.

   Customer Service
   A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.

   Help Center
   A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Build Your Own

Provides the basic pages every community needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your community, customize your branding and themes.

Aloha

A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication, including social logins.

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Allows full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce app.

Keep in mind that Salesforce Tabs + Visualforce isn't a Lighting-based template and therefore doesn't work with Community Builder.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

3. Select the template that you want to use.
4. Read the template description and key features, and click **Get Started**.
5. Enter a community name.

   Note: If you're creating multiple communities, differentiate the beginning of the community name. Community names are truncated in the global header dropdown menu. Users can see up to 32 characters of the name, and names include the status. Make sure that the visible part of the name allows users to distinguish between multiple communities.

6. For URL, enter the name of your community.

   This name is appended to the Communities domain that you created when you enabled communities for this org. For example, if your Communities domain name is `UniversalTelco.force.com` and you're creating a customer community, you can enter *`customers`* to create the unique URL `UniversalTelco.force.com/customers`.

   Note: You can create one community that doesn't have a custom URL.

   You can change your community name and URL after the community is activated, but users aren't redirected to the new URL. So be sure to inform your community members before changing the name or URL.

7. Click **Create**.
   The community is created in Preview status. Now you're ready to build and customize or manage and moderate your community.

When you create a community, Salesforce supplies default pages for login, self-registration, change password, forgot password, and your home page. These pages are based on which template you use to create your community. You can customize these default pages at any time in the Login & Registration page of the Administration workspace.

Important: After you create a community, your profile is added to the list of profiles that have access to the community. Then all users with this profile can log in to the community after it's active. If you don't want all users with your profile to have access

to the community, remove the profile, and give yourself access through a different profile or permission set. Then create a profile specifically for your community users.

SEE ALSO:

- Set Up and Manage Salesforce Communities
- How many communities can my org have?
- Edit Community Pages and Components in Community Builder
- Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity

How many communities can my org have?

You can have up to 100 communities in your Salesforce org. Active, inactive, and preview communities, including Lightning Platform sites, count against this limit.

To see this limit in your org, from Setup enter *Communities* in the Quick Find box, then select **All Communities**. The Maximum number of communities field displays 100.

SEE ALSO:

- Create Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customize Communities

Update basic community settings like your community URL, community name, members, login options, and general preferences in the Administration section of Community Workspaces or Community Management.

You can customize your community at any time, but if you plan to make major changes, we recommend deactivating the community first.

1. Open Community Workspaces or Community Management.
2. Click **Administration**, then select what you want to customize.

   Important: The options available in Community Management or Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community doesn't use topics, you don't see the Topics section. Some options in the following list might not appear in your community by default. To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Community Management** or **Show all settings in Community Workspaces**.

   - Members
   - Tabs
   - Branding
   - Login & Registration
   - Emails
   - Pages
   - Preferences
   - Settings

3. To share the community with stakeholders while it's still in Preview, copy the URL displayed on the **Administration** > **Settings** page.

   By sharing your community in Preview, you can get useful feedback to incorporate before going live. Also, by having early members post, comment, and share records, your community appears active when members log in to the community for the first time.

   Keep in mind that you must add users as members of the community before you can share the community URL.

After you finish customizing your community, activate the community to make it available to members. If you enable welcome emails when you activate, a welcome email is sent to all members. If users are new portal users, their welcome email includes their username and password.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To access moderation rules and criteria:

- Manage Communities OR Create and Set Up Communities

To customize administration settings or use Community Builder:

- Create and Set Up Communities

Add Members to Your Community

Use profiles and permission sets to manage community membership during the setup process.

Using profiles and permission sets, you can:

- Grant or remove access for groups of users. Once you add a profile or permission set, all users assigned to that profile or permission set become members of the community.
- Enforce a membership policy. New users added to a profile or permission set that is already associated with a community automatically gain access.

Permission sets allow added flexibility for adding members. You can grant community access to a subset of users from the same profile, without needing to clone the profile.

Standard, Chatter, and partner profiles can be added to communities; Chatter customers, from private groups with customers, can't be added to communities even if they're assigned permission sets that are associated with communities.

Note: Profiles and permission sets associated with communities can't be deleted from Salesforce. You must remove the profiles or permission sets from the communities first.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Members**.
3. To add members using profiles:
   a. To filter profiles, select a profile type from the drop-down menu. To search for a specific profile, enter a search term and click **Find**.

      Search returns profiles for the selected filter.

      Note: Search results include profiles that are already part of the community.

   b. Select the user profiles you want to allow access to your community. Press CTRL to select multiple profiles.
   c. Click **Add**. To remove a profile, select it and click **Remove**.

      If you remove a profile from a community, users with that profile lose access to the community, unless the users are assigned permission sets or other profiles that are still part of the community. Their posts and comments still appear.

      Important: If you're an admin and accidentally remove yourself from a community, you can't access the Administration settings in Community Management or Community Workspaces. To add yourself back to the community or make other membership updates, use the API.

4. To add members using permission sets:
   a. To search for a specific permission set, enter a search term and click **Find**.
   b. Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.
   c. Click **Add**.

      If you remove a permission set from a community, users with that permission set lose access to the community, unless the users are associated with profiles or other permission sets that are still part of the community. Their posts and comments still appear even after they lose access.

5. Click **Save**.

If the community is `Active` and welcome emails are enabled, users with the profiles or permission sets you added receive a welcome email. The welcome email includes a username and a change password link if it is sent to an external user who hasn't logged in to a community yet.

When the community is `Active`, welcome emails are sent and the community is discoverable by members. When a community is in `Preview` status, only members with the login URL can view the community. If a community is `Inactive`, only users with the "Create and Set Up Communities" permission can access it through the Community menu, regardless of membership.

There are additional options for granting access to your community:

- Enable self-registration so that external users can register on their own
- Enable authentication providers, such as Facebook, so that external users can log into the community without creating an account

For more information about these additional options, see Customize Login, Self-Registration, and Password Management for Your Community.

SEE ALSO:

Customize Communities

Enable the Global Header for Communities

Determine User Visibility in Your Community

User sharing lets you decide whether all users in a community are visible to each other.

There are two settings to consider when setting up sharing for external users and both are turned on by default when you enable Communities.

The **Community User Visibility** setting controls whether sharing is available for all the communities in your org. If Community User Visibility is enabled, you have the option of selecting **See other members of this community**, with turns visibility on or off, on a community-by-community basis.

The default setting allows an external user to see other external users under the same account and users in common communities. You can change the organization-wide default for Users to make your communities more restrictive or open, depending on your use case.

If the you deselect **Community User Visibility**, external users can't see each other. For example, John and Sally are external users. John can't:

- Search for Sally
- Find Sally in the community People tab, even if Sally is a member of the community
- Add Sally to a group
- Share a file or record with Sally

If John and Sally are members of the same group or share the same record, then they can see each other's conversations and updates within the group or on the record, but nowhere else.

If Sally belongs to the same account as John, and John has delegated external user administration privileges, then John can see Sally. Delegated External User Administration takes priority over user sharing.

Note: User sharing doesn't apply to the Recently Viewed list on the People tab in Chatter or on user lookups. From that list, users can view people they have viewed before, but who aren't members of the community.

To view or change user sharing settings for your organization:

1. From Setup, enter *Sharing Settings* in the `Quick Find` box, then select **Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Deselect the **Community User Visibility** checkbox make external users visible only to themselves and their subordinates.

4. Click **Save**.

You can change the visibility of members on a community-by-community basis, from that orgs settings. Go to **Workspaces** > **Administration** > **Preferences** and select or deselect **See other members of this community**.

SEE ALSO:

Control User Visibility on a Community-By-Community Basis

Controlling Who Community or Portal Users Can See

Control User Visibility on a Community-By-Community Basis

Ensure that members can see only other members of the community that they're logged into. Enable Community User Visibility to control member visibility on a community-by-community basis.

To enable Community User Visibility:

1. Log into your org and go to **Workspaces** > **Administration** > **Preferences**. Check the box next to **See other members of this community**.
2. Go to **Setup** > **Sharing Settings**, and enable **Community User Visibility**.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Reset An External User's Password for Communities

An external user's password can be reset either by the user or by the administrator of the org hosting the community.

In either case, when someone initiates a reset of an external user's password, an email is sent to the user with a link to reset the password. Password reset links expire after 24 hours. When users click the link, they are required to reset their password before proceeding.

If a user-initiated password reset request can't be processed, users receive an email telling them why. Password reset requests fail if a user's account is temporarily or permanently locked due to too many unsuccessful login attempts or if the request was sent outside approved login hours, IP ranges, or network locations.

SEE ALSO:

Create Communities Users

How do external community members get login information?

How do external community members get login information?

External users get their login credentials in welcome emails from a community.

When you enable a contact as a customer user or partner user, they don't receive their login credentials until you add them to a community with welcome emails enabled. If welcome emails are disabled for the community, the external user doesn't receive credentials, and you must manually send them. To do so, from Setup, enter *Users* in the Quick Find box, select **Users**, select the checkbox next to the user's name, and then click **Reset Password**. An email containing the user's username and a link to reset the password is sent to the user. The link in this email expires after 24 hours.

SEE ALSO:

Create Communities Users

Reset An External User's Password for Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

How do I update community membership using the API?

If you aren't a member of a community, you can't access Community Management to update administration settings, including membership. As an alternative, you can use the API and Data Loader to add yourself and others to a community.

Tip: You can also use other data loaders to update your community membership such as Workbench.

1. Get the `networkId` for your community.

   From Setup, enter *`All Communities`* in the `Quick Find` box, select **All Communities**, and then right-click your community URL and select **Inspect**. The `data-networkId` property provides your `networkId`.

2. Get the `profileId` or `permissionsetId` you want to add.

   From Setup, enter *`Profiles`* in the `Quick Find` box, then select **Profiles** or **Permission Sets**. Click on the profile or permission set that you want to add. The ID is the last part of the URL.

   For example, at *`mycompany.salesforce.com/00aa11bb22`*, the ID is *`00aa11bb22`*.

3. Create a .csv file with columns for `networkId` and `parentId`. For `parentId`, list the `profileId` or `permissionsetId` you want to add.
4. Open Data Loader and select the **Network Member Group** object. Specify the location of the .csv file you created and complete the Data Loader steps.

Once you have successfully added members using Data Loader, the members will be able to access Community Management from the **Manage** link on the **All Communities** page in Setup.

Note: In order to access Community Management, the member must also have "Create and Set Up Communities" or "Manage Communities" permission.

SEE ALSO:

Insert, Update, or Delete Data Using Data Loader

Add Tabs to Your Community

If you're using the Salesforce Tabs + Visualforce template, you can add tabs to your community.

Tip: If you want to use all custom pages in your community, you can choose to hide tabs.

Before you begin, keep these things in mind:

- Enable the tabs that are required for the type of activity you're performing in this community. For example, sharing accounts and opportunities with your partners or sharing cases and solutions with customers who need support. Don't clutter your community with tabs that users don't need.
- Profiles control access to tabs. If a profile doesn't have access to a tab, the tab is hidden for that profile in the community. In that case, you must manually expose the tabs in the profiles for your community members so that they can see the tabs in the community.
- Lightning Component tabs aren't supported in Communities.
- Chatter Free users in your community don't see any tabs except the Chatter tab.

After you identify the features you want your community members to see, you can expose those features by choosing the corresponding tabs during setup. The tabs that you select also determine community navigation in the Salesforce app.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Tabs**.

   Tip: If you're using one of the preconfigured templates instead of Salesforce Tabs + Visualforce, the **Tabs** page is hidden by default. To display the page, click **Administration** > **Preferences**, then select **Show all settings in Community Management** or **Show all settings in Community Workspaces**.
3. Select the tabs to include in your community from the Available Tabs list. To select multiple tabs, press CTRL.
4. To add a tab, click **Add**. To remove a tab, select it in the Selected Tabs list and click **Remove**.
5. To change the order that the tabs display, click **Up** or **Down**.

   The tab at the top of the list is the landing tab for the community. When members access the community, it is the first tab they see.

   If members don't have access to the community landing tab, they see the first tab that they have access to from the selected community tabs. If they don't have access to any of the tabs, they see the Home tab.
6. Click **Save**.

Important: Changing from the Salesforce Tabs + Visualforce template to a Community Builder-based template removes all tabs from your community.

SEE ALSO:

Customize Communities

Rename the Chatter Tab

Rename the Chatter Tab

Most likely, many of your community members will use the Chatter tab as their home base. You can customize it to meet your company's branding.

The Chatter tab is the fastest way for your community members to see what's most important to them: activity feeds, groups, bookmarks, files, and more. Many of your community members will most likely use the Chatter tab as their home base. Customize the name of the Chatter tab in your community to match your company branding—for example, you can use your company's name or any other name that would be recognizable to your members.

1. From Setup, enter *Rename Tabs and Labels* in the Quick Find box, then select **Rename Tabs and Labels**.
2. Select your default language from the Select Language drop-down list at the top of the page.
3. Under Chatter Tabs in Communities, click **Edit** next to the community you want to edit.
4. Type the singular and plural versions of your preferred tab name, for example, Partner and Partners. Select Starts with a vowel sound if appropriate.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To rename the Chatter tab:

- Customize Application

  OR

  View Setup and Configuration

  AND

  Be designated as a translator

Brand Your Community

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Workspaces or Community Management. You can add your own logo, colors, and copyright so that your community matches your company's branding and is instantly recognizable to your community members.

Important: Follow these steps to design your community's branding. If you're using the Community Builder to create your custom pages, you can use the Community Builder instead.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Branding**.
3. Use the lookups to choose a header and footer for the community.

   First upload the files for your header and footer to the Documents tab. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The footer must be an HTML file. The maximum file size for all HTML files is 100 KB. So if you have a footer HTML file that is 70 KB and you want to use an HTML file for the header, it must be 30 KB or smaller.

   The header you choose replaces the Salesforce logo below the global header. The footer you choose replaces the Salesforce copyright and privacy footer.
4. Click **Select Color Scheme** to select from the predefined color schemes. Or click the text box next to the page section fields to select a color from the color picker.

   Here's how selected colors show up in your community and in the Salesforce app.

Color Choice	Where It Appears
Header Background	Top of the page, under the black global header. If you select an HTML file in the Header field, it overrides this color choice. Top of the login page. Login page in the Salesforce app.
Page Background	Background color for all pages in your community, excluding the login page.
Primary	Tab when it's selected.
Secondary	Top borders of lists and tables. Button on the login page.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

SEE ALSO:

Customize Communities
Brand Your Community's Login Page
Create Dynamic Branding URLs

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Customize Email Sent from Communities for Email Verification

You can customize email sender information and Chatter email branding. You can also customize email templates, such as templates for welcoming new members and resetting member's passwords. You can customize email templates in the user interface or with Visualforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. From Setup, enter *All* in the Quick Find box, and select **All Communities**. Next to your community, click **Workspaces**.
2. Click **Administration**, and then select **Emails**.
3. Enter custom values for the email sender's name and address to replace the default values.

   Note: If you change the sender's email address, we send a verification email to the new address. The change is pending, and we continue to use the existing address while we await verification. The requested address doesn't take effect until you click the confirmation link in the email. If verification is already pending for a new email address, and you specify a different new address, we retain the latest value and use that value for verification.

   If you enter a custom value for the sender's address and you have enabled mail relay, your Chatter emails use the relay.

4. Customize what displays in the footer of Chatter emails.

   Important: Both a logo and email footer text are required. Keep in mind that:

   - All Chatter emails display the Chatter logo and Salesforce information by default unless you replace them with your org's own logo and information.
   - If you previously customized the logo or footer text and want to restore the default values, use the API to set these fields to `null`.

   a. To replace the default Chatter logo, choose a logo.

      The logo must be an existing document in the Documents tab and must be marked Externally Available Image. Images of 150 x 50 pixels on a transparent background work best.

   b. To replace the default footer text, enter up to 1,000 characters.

      The default text includes the Salesforce name and physical address. We recommend including your org's physical address to comply with applicable anti-spam laws.

5. To send email to users when they're added to the community, select **Send welcome email**.

   Important: Welcome emails contain login information for external members. If you don't select this option, you must send username and password information directly to the user who's registering for your community.

   Salesforce sends welcome emails when:

   - A community changes from Preview status to Active status. An inactive community doesn't receive emails unless the associated org has a default portal or if the user's profile is part of an active portal.
   - An admin adds a profile or permission set to an active community.
   - A user of an active community is assigned a profile or permission set.

   By default, the link provided in the welcome email is valid for seven days, but you can change the duration.

   a. From Setup, enter *Sessions* in the Quick Find box, then click **Session Settings**.

   b. From the dropdown menu, select **Link Expires In**, and select the duration.

Note: If a profile or permission set is part of multiple communities, users with that profile or permission set receive a welcome email from each community. The first email contains login credentials, but emails from subsequent communities simply contain a link to the community.

6. To send email to users when they receive a one-time password, for One-Time Password, look up and select the email template, `Communities: One-Time Password Email`.

   Important: This one-time password email message is not enabled by default. If you don't select this option, Salesforce sends a generic message for identity verification.

   Salesforce sends verification emails whenever users are required to confirm their identity.

   - An external user attempts to log in to your community with an email address.
   - An external user attempts to log in to your community from a new browser.
   - An external user attempts to register a mobile or U2F device.

7. To send an email to users to verify their email address, for User Verification Email, look up and select the email template, `Communities: User Verification Email`.

   Salesforce sends async verification emails along with a verification link to users so they can verify their identity. After verifying their email address, external users can log in with a one-time password (OTP) via email (passwordless login).

8. To select an email template for Forgot Password, Change Password, Case Comment, User Lockout, One-Time Password emails, or User Verification Email, click . Then select an email template from the list.

   Password reset links expire after 24 hours.

   You can customize the default email templates.

   Note: When you customize the contents of a default email template, use the `{!Community_Url}` merge field to populate the URL for the current community. This field ensures that emails have the correct URL to direct users to the appropriate community. The `{!Community_url}` merge field is not available for the User Lockout template.

9. Click **Save**.

Emails that are sent as a result of approvals and workflows, and changes to unscoped objects, like cases, are sent based on community membership. For example, if a workflow triggers an email, all the recipients are grouped based on community membership and then one email is sent to each group. If the user is a member of multiple active communities, the email comes from the oldest active community.

Note: Objects that you can see whether you're in a community or your internal Salesforce org are called unscoped objects. Unscoped objects include records like opportunities, accounts, cases, and the like.

Another way to customize community emails is to use these fields on the API Network object.

- `CaseCommentEmailTemplateId`—ID of the email template used when submitting a comment on a case.
- `ChangePasswordEmailTemplateId`—ID of the email template used when notifying users that their password has been reset.
- `EmailFooterLogoId`—ID of the Document object that displays as an image in the footer of community Chatter emails.
- `EmailFooterText`—Text that displays in the footer of community Chatter emails.
- `EmailSenderAddress`—Read only. Email address from which community emails are sent.
- `EmailSenderName`—Name from which community emails are sent.
- `ForgotPasswordEmailTemplateId`—ID of the email template used when users forget their password.
- `LockoutEmailTemplateId`—ID of the email template used when users try to reset their password after locking themselves out of their community from too many login attempts.

- `NewSenderAddress`—Email address that has been entered as the new value for `EmailSenderAddress` but has not been verified yet. After a user has requested to change the sender email address and has successfully responded to the verification email, the `NewSenderAddress` value overwrites the value in `EmailSenderAddress`. This value becomes the email address from which community emails are sent.
  - If verification is pending for a new email address and you set `NewSenderAddress` to null, the verification request is canceled.
  - `NewSenderAddress` is automatically set to null after `EmailSenderAddress` has been set to the new verified address.
  - If verification is pending for a new email address, and you specify a different new address for this field, only the latest value is retained and used for verification.
- `OptionsSendWelcomeEmail`—Determines whether a welcome email is sent when a new user is added to the community.
- `VerificationEmailTemplateId`—ID of the email template used when users must verify their identity, for example, when they log in without a password or from a new device.
- `WelcomeEmailTemplateId`—ID of the email template used when sending welcome emails to new community members.

SEE ALSO:

Merge Fields for Communities

Customize Communities

Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer

Use Your Classic Email Templates in Lightning Experience

Merge Fields for Communities

You can personalize the email that you send to community members by adding merge fields to your Communities email templates.

When you enable Salesforce Communities in your org, Salesforce provides text-based email templates to simplify communicating with your community members. You can use these templates to:

- Welcome new members
- Handle forgotten passwords
- Reset passwords
- Notify users when they're locked out after failing to log in after so many attempts
- Comment on cases
- Send one-time passwords for identity verification
- Send verification links in asnyc email messages for identity verification

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community email templates have merge fields unique to communities. You can find them under the Network Member Fields field type. You can also use other merge field types, such as Receiving User and Organization. Here are a few merge fields commonly used in Community email templates.

Field Name	Description
{!Network_Community_Name}	The name of the community.

Field Name	Description
{!Network_Community_Url}	The URL to the login page of the community, for example, `https://acme.force.com/partners/login`. {!Community_Url} is populated in the: • Welcome New Member template when **Send welcome email** is selected • Forgot Password or Change Password template if the external user receiving the email is a member of the community
{!Receiving_User.Username}	The username of the user receiving the email.

Note: Available merge fields differ between email templates. View Available Merge Fields at the top of each email template to see the available fields.

For more flexibility, you can create custom Communities email templates in Visualforce. For a Visualforce email template, use the `$Network` global merge field type and its properties, as described in this table. These fields are populated only in Visualforce Communities email templates.

Field Name	Description
`$Network.ActionForVerificationEmail`	Used in one-time password (OTP) emails to specify the action that prompted sending a verification email.
`$Network.AsyncVerificationLink`	Used in asynchronous emails to send a verification link (URL) to users. Users click the link to verify their email address with Salesforce. After verifying their email address, external users can log in with a one-time password (OTP) via email (passwordless login).
`$Network.BrowserForVerificationEmail`	Used in OTP emails to specify the browser where the action occurred that prompted sending a verification email.
`$Network.CodeForVerificationEmail`	The verification code sent in the OTP email.
`$Network.Name`	The name of the community.
`$Network.NetworkUrlForUserEmails`	The URL to the login page of the community, for example, `https://acme.force.com/partners/login`. If this merge field is in the welcome email to new members, the URL is appended with a link to a reset password page.
`$Network.OperatingSystemForVerificationEmail`	Used in OTP emails to specify the operating system where the action occurred that prompted sending a verification email.
`$Network.passwordLockTime`	Used in the formula field for lockout emails to specify how long a user must wait until logging in again after being locked out.

For more information on creating Visualforce templates, see the Visualforce Developer Guide.

If your community uses cases, approvals, or workflows, emails created from an email template that use the `{!<any_object>.Link}` or `{!Case.Link}` merge fields include a link to the record in the community. If the user receiving the email is a member of multiple active communities, the link goes to the oldest active community. If the user is already logged in to a community and clicks the link in the email, the link goes to that community. If the user is not a member of any community, the link goes to the internal org. If the user is a member of a portal and a community, the link goes to the community.

Field Name	Description
{!Case.Link}	Used in: • Case comment notifications to contacts and owners • Case creation and update notifications to contacts
{!<any_object>.Link}	Used in: • Approval requests sent to approvers and delegated approvers • Workflow email alerts

To insert merge fields into your Communities email templates,

1. From Setup, enter *Email Templates* in the Quick Find box, and select **Classic Email Templates**. Next to an email template, click **Edit**.
2. Under Available Merge Fields, from the dropdown menu, select the field type, and then select the field. For merge fields specific to communities, select **Network Member Fields**.
3. Copy the merge field value into the body of the email template.

SEE ALSO:

Customize Email Sent from Communities for Email Verification

Email Templates in Salesforce Classic

One-Time Password Email Template

You can customize the email that you send to external users to verify their identity with a one-time password (OTP). The email includes a verification code that users enter to prove their identity. Control how you communicate with your customers and partners by rewording the email that comes with the verification code.

Your org sends out an email with a one-time password for all email verifications, such as when you set up:

- Device activation—Require external users to verify their identity when they log in from a different browser or new device. You enable device activation from the external identity profile, under Session Settings.
- Passwordless login—Set up a login page for your community that allows users to log in with their email address. You create a passwordless login page from your community's Login & Registration page. See Customize Your Community's Login Experience.
- Two-factor authentication—Require users to log in with two-factor authentication.

The one-time password email template is available to communities as of Winter '19.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. From Setup, enter *All* in the Quick Find box, and select **All Communities**. Next to your community, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to One-Time Password, and select **Communities: One-Time Password Email**.
4. Click **Save**.

   Your community is set up to send verification code notifications to users.

5. To customize the notification, edit the email template.
   a. From Setup, enter *Email Templates* in the Quick Find box, and select **Classic Email Templates**.
   b. Next to Communities: One-Time Password Email, select **Edit**.
   c. Edit the text in the email body.

      Note: Do not remove `{!Verification_Code}`.

   d. (Optional) In the email body, insert merge fields listed under Available Merge Field. To get the merge field value, select a field type, and then select a field. Copy and paste the merge field value into the email body.

      For example, from the Field Type dropdown, select **Network Member Fields**, and then select **Community Name**. The Merge Field Value displays `{!Community.Name}`.

   e. Click **Save**.

You can also use Visualforce to create a custom OTP email template using the `$Network` global merge field type. See Merge Fields for Communities.

User Lockout Email Template

You can customize the email template you send to users when they attempt to reset their password after getting locked out of your community due to too many failed login attempts. You can change the look to match your brand and how and when users can unlock their accounts.

Users are unable reset their passwords when their accounts are locked. Depending upon their password policy, they may need to wait a period of time or reach out to an admin to unlock their account before they can reset their password. Admins set the password policy, including the maximum allowable invalid login attempts, on the community user's profile page. This password policy determines the next steps users take to unlock their account. The default email template includes a formula that checks the profile's password policy and pulls that information into the notification sent.

The user lockout email template is available to communities as of Summer '18.

1. From Setup, enter *All* in the Quick Find box, and select **All Communities**. Next to your community, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to User Lockout, and select **Communities: User Lockout Email**.
4. Click **Save**.
   Your community is set up to send notifications to users when they're locked out of their accounts.
5. To change the formula or make other customizations, edit the email template.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Note:

- The formula included in this template is only for lockout emails. When applied to another email type, the formula returns a blank message.
- The `{!Community_url}` merge field is not available for the lockout template.

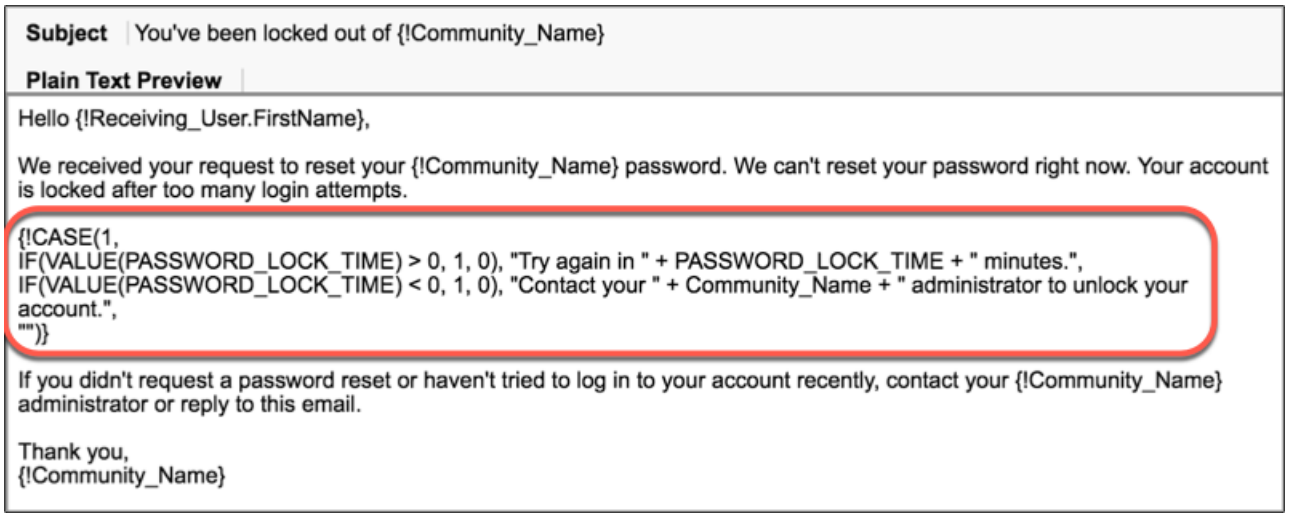
a. From Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.

b. Next to Communities: User Lockout Email, select **Edit**.

c. Edit the text in the email body. To personalize your email content, use the available merge fields listed at the top of the page.

d. Click **Save**.

Example: If the password policy locks users out for 15 minutes before they can try to log in again, the formula returns the following message: "Try again in 15 minutes."



Enable Notifications in Lightning Communities

With Global Notifications, your members receive messages wherever they are working, whether in their communities or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

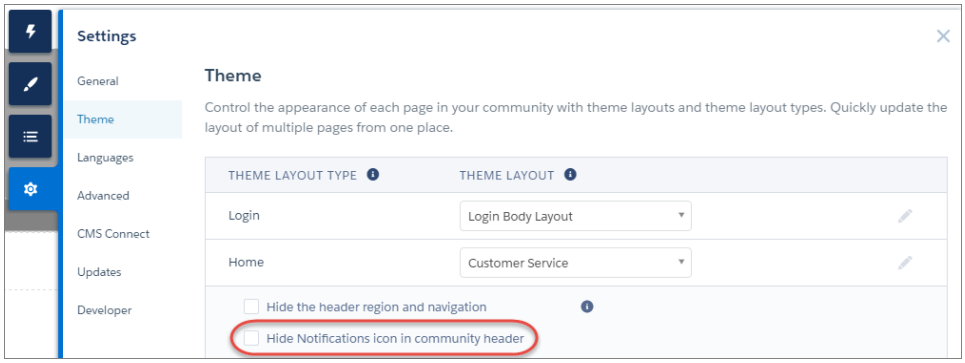
To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

All events that trigger notifications are supported. Members can even trigger notifications on record feeds. For example, an internal member can trigger a notification from the Salesforce org by @mentioning an external member on a lead or opportunity. When a member clicks a notification, the originating detail page or other appropriate location is displayed for seamless collaboration across communities and apps.

Note: If you use the Build Your Own template, create the Feed Detail page so you can see notifications.

By default, the Notifications icon is hidden in existing communities and displayed in new communities.

1. In Community Builder, click on the left sidebar and then click **Theme**.
2. For the default Customer Service theme layout, show or hide Notifications for your members by selecting **Hide Notifications icon in community header**.



Enable the App Launcher in Lightning Communities

Display the App Launcher in Lightning communities to make it easy for members to move between their communities and their Salesforce org. This functionality is available in any community based a Lightning community template or Lightning Bolt solution.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The App Launcher displays a tile for every app and published community (both Tabs + Visualforce and Lightning communities). Unlike in Lightning Experience, the All Items area and AppExchange link aren't available. Users see only the apps and communities that they're authorized to see according to their profile or permission sets.

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

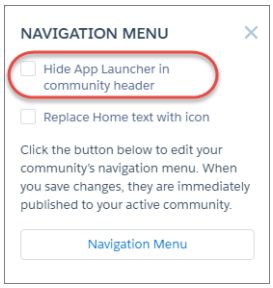
To let members see the App Launcher:
- Show App Launcher in Communities

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

The App Launcher is automatically enabled for new communities, but for older communities, you may need to enable it manually.

1. In Community Builder, select the **Navigation Menu** component in the page you're configuring.

2. To display the App Launcher in existing communities, ensure **`Hide App Launcher in community header`** is deselected.



3. To let users see the App Launcher, ensure the Show App Launcher in Communities permission is enabled in user profiles in Setup. By default, this user permission is enabled for all standard profiles but it's not enabled for custom profiles. Enable this user perm on custom profiles or create a permission set.

Note: The App Launcher is not available in any Salesforce mobile experience or in Salesforce Tabs + Visualforce communities. Members who use Salesforce Tabs + Visualforce communities and Salesforce Classic can use the global header to switch between their communities and their Salesforce org.

SEE ALSO:

Switching Between Your Salesforce Org and Your Communities

Enable the Global Header for Communities

Enable the Global Header for Communities

In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets you switch between your communities and your Salesforce org.

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

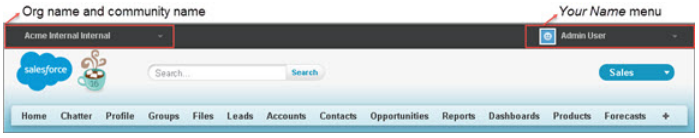
USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

Communities must be enabled in your Salesforce org to use the global header.

Important: The global header is visible only in Salesforce orgs using Salesforce Classic. Salesforce orgs using Lightning Experience can use the App Launcher.



The View Global Header permission is disabled by default for all standard profiles. To view the global header, users must be assigned the View Global Header permission either by selecting it on standard profiles, creating custom profiles, or by creating a permission set. Create permission sets to easily assign this permission to specific people.

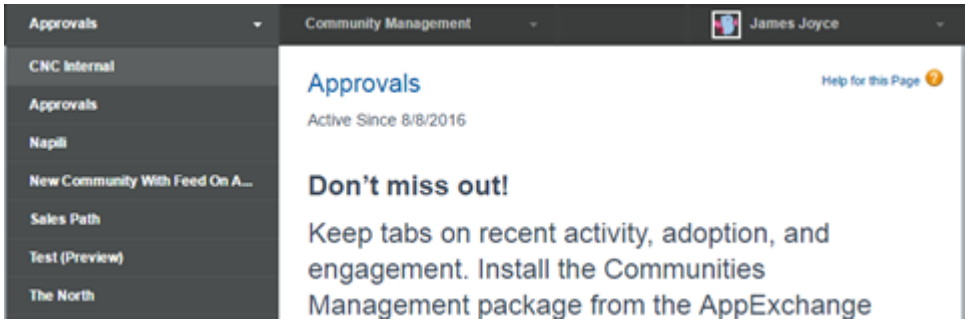
1. From Setup, enter *`Permission Sets`* in the `Quick Find` box, then select **Permission Sets**.
2. Click **New** and create a permission set that includes the System Permission `View Global Header`.
3. Assign the permission set to the appropriate users.

Users with this permission set see the global header at the top of all pages. They can use the menu on the left to switch between their internal org and any communities they have access to.

The *Your Name* menu on the right side contains links to edit contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features.

In a Salesforce Tabs + Visualforce community, users with either the Manage Communities or the Create and Set Up Communities permission see a gear icon ( ) they can use to switch to Community Workspaces or Community Management.

Note: Within Community Workspaces or Community Management, users see the global header and the Community Management menu, even if they don't have the View Global Header permission. However, we recommend that you still assign the View Global Header permission so users can switch between your Salesforce org and communities.



SEE ALSO:

Switching Between Your Salesforce Org and Your Communities

Enable the App Launcher in Lightning Communities

Share a Link to Your Community

You can allow members to preview your community before making it active.

You can only share the link for a preview community with users who were added as members of the community.

Sharing a link to a community in `Preview` status allows you to easily gather stakeholder feedback. The community functions just as it will when you make it active, so stakeholders can try out all functionality and review your branding and customizations. Additionally, you can take advantage of having early members who can post, comment, and share records so that members enter an active community from their first login.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Settings**.
3. Copy the URL displayed on the page and share it with your stakeholders.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To share a preview URL for your community:

- Create and Set Up Communities

Keep in mind that you can only share the URL with users who you added as members of the community.

SEE ALSO:

Customize Communities

Communities Statuses

Activate Your Community

Activate your community to make it accessible to community members. The result of activation differs somewhat depending on the type of community you have.

- **Salesforce Tabs + Visualforce**: Activating the community makes the community URL active and enables login access for community members. If welcome emails are enabled when you activate, a welcome email is sent to all members. If any of those users are new portal users, their welcome email includes their username and password.
- **Lightning communities**: Activating the community sends out a welcome email to all community members. Activation is also required to successfully set up SEO for Lightning communities. To make the community URL active and enable login access for community members, publish the community.

To activate a community:

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Settings**.
3. Click **Activate Community**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

SEE ALSO:

Communities Statuses

Customize Communities

Deactivate a Community

Communities Statuses

Communities can have one of the following statuses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Status	Description
`Preview`	Customization of the community isn't complete, and the community has never been activated. Once you activate a community, you can't go back to `Preview` status. Users with "Create and Set Up Communities" can access communities in `Preview` status if their profile or permission set is associated with the community. They can also share a link to these communities with users whose profiles or permission sets are associated with the community. The link for sharing a `Preview` community is located on the Community Management page. If you're using Community Workspaces, the link for sharing a `Preview` community is located under Administration. No welcome emails are sent even if `Send welcome email` is selected.

Status	Description
	Note: If your org's access to Communities is suspended for non-payment, all your communities are deactivated, including the communities in Preview. When Communities is reenabled, all communities are inactive. You can activate these communities, but you can't return to the Preview state.
`Inactive`	The community was previously `Active` but was deactivated. You may want to deactivate a community if you need to: • Add or remove members • Add, remove, or change the order of tabs • Change the color scheme • Change the community URL When you deactivate a community , it no longer appears in the drop-down menu. Users with "Create and Set Up Communities" can still access the setup for `Inactive` communities regardless of membership. If members try to access `Inactive` communities using a direct link, they see an error page. Welcome emails are sent if `Send welcome email` is selected or if the user's email settings are not enabled.
`Active`	The community is active and available to members. Welcome emails are sent to new members if `Send welcome email` is selected.

SEE ALSO:

- Customize Communities
- Activate Your Community
- Deactivate a Community
- Share a Link to Your Community

Update Your Community Settings

Manage your community name, description, community status, and community template all from one location.

You can change your community name and URL after the community is activated, but users aren't redirected to the new URL. So be sure to inform your community members before changing the name or URL.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Settings**.
3. Edit your community settings as needed.
   - Select next to the community you want to change, and make your changes. You can change your URL from this page. However, if you've already activated your community, users aren't redirected to the new URL.
   - Manage the status of your community.
   - Change your community template.

SEE ALSO:

Change Your Community Template

Communities Statuses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Deactivate a Community

You may want to deactivate a community if you need to:

- Add or remove members
- Add, remove, or change the order of tabs
- Change the color scheme
- Change the community URL

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Settings**.
3. Click **Deactivate**.

   Your community is inactive and offline.

   When a community is inactive, members still see it in the menu, but can't access it unless they have the "Create and Set Up Communities" permission.

SEE ALSO:

Communities Statuses

Activate Your Community

Customize Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Change Your Community Template

If you use the Salesforce Tabs + Visualforce template, you can change your template to a Lightning community template or any installed Lightning Bolt Solution in Community Builder.

Note: Apart from the Help Center template, we don't recommend changing from one Lightning community template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new community instead. If you do change from one Lightning community template to another and lose your customizations, Salesforce Customer Support will be unable to assist you.

Important: There is no data loss when you change templates, but some customizations are lost. Be sure to review Considerations for Changing Your Community Template before changing your template.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Settings**.
3. Click **Change Template**.
4. Choose the template you want to switch to.
5. When prompted, select **Change Template** to confirm your changes.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

After you change the template, you are taken back to Community Workspaces or Community Management.

Check to make sure your community pages, such as the Login page or Community Home page, are still the best choice for your updated community template. For example, if you previously had a Salesforce Tabs + Visualforce template and switch to the Customer Service template, update your pages to use Community Builder pages instead of Visualforce pages. If necessary, customize your community in Community Builder and publish any changes you make.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

Considerations for Changing Your Community Template

Changing your community template affects the community navigation, branding, and customizations.

Note: Apart from the Help Center template, we don't recommend changing from one Lightning community template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new community instead. If you do change from one Lightning community template to another and lose your customizations, Salesforce Customer Support will be unable to assist you.

- When you change your template, Salesforce object data carries over, but some branding and component customizations do not. You may have to redo some of your customizations. You can back up most customizations by exporting your community. See Save a Copy of Your Community's Customizations.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Changing the community template updates the navigation options in Community Workspaces or Community Management. To view all available navigation options regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Community Workspaces or Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, `/s` is appended to the community URL. Be sure to update any links to your community with the updated URL.
- In active communities
  - When you switch over to the Koa, Kokua, or Customer Service templates, your template change is saved in a draft version. Use the draft version to further customize your community in Community Builder. Your community is updated only after you publish your changes.
  - When you switch to the Salesforce Tabs + Visualforce template from any other template, your changes immediately reflect in your active community. In this scenario, we recommend that you deactivate your community before you change your template. Once you've made all your changes, reactivate the community.
  - If your template is listed as `None`, it means you're not using a predefined template or you are using a modified version of one of our templates.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

Enable Optional Community Features

Enable other optional features in your community such as user nicknames, guest access, private messages, direct messages, content flagging, and reputation levels.

To use these settings, Chatter must be enabled in your organization.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Preferences**.
3. Change the desired settings.

General

- Display nicknames instead of full names in your community. Enabling nickname display in your community allows more privacy and protects member identities. This protection is especially helpful in a public community where unregistered visitors can access member profiles.
- Enable access to public Chatter content in your community so that guest users can access it without logging in. Allowing this access is a way to boost adoption. It helps customers easily find information they need without having to log in, register, or contact your company directly.
- Enable Chatter messages, which allow community members to have secure private conversations with other Chatter users. To expose Chatter messages for external users, administrators must also enable the Chatter tab in communities using the Salesforce Tabs + Visualforce template.
- Enable direct messages, which allows community members to have secure private conversations in communities built using the Customer Service template.
- Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

- Show all settings available in Community Management or Community Workspaces that are hidden by default based on how you set up your community. Enabling this setting overrides the dynamic navigation provided in Community Management and Community Workspaces.

Community Management or Community Workspaces

- Allow members to flag posts, comments, or files for moderation on page 580 within your community. Members can flag items that contain inappropriate language or sensitive information.
- Enable Reputation on page 631to allow community managers to set up a point system that rewards users who participate in the community. Administrators set up corresponding reputation levels that users see on their profile.
- Enable knowledgeable people on page 631so you can discover who's knowledgeable on topics and endorse people for their knowledge on a topic.
- Enable Upvoting and Downvoting to allow community members to participate in evaluating the worth of a question or answer. Up and down voting is enabled by default in communities created as of Winter '18 and later.
- Assign Permission to Verify Answers for Your Company to allow selected community members to mark an answer as company verified.
- Assign Post Pinning Permission to allow selected community members to pin a critical post to the top of a group or topics feed.
- Assign a Default Community to a User Profile to associate that profile with a specific community. Notification emails about network-agnostic objects, like cases, accounts, and opportunities, take on the default community's branding. Links in the emails take users to the default community—no more news from nowhere.
- Add Rich Publisher Apps to Your Feeds to enhance your feeds with payloads that are unique to your business process.

Files

- Set the maximum size in MB for files uploaded to the community.
- Specify the types of files that can be uploaded in the community.

4. Click **Save**.

IN THIS SECTION:

Show Nicknames Instead of Full Names in the Community

Enabling nickname display in your community allows more privacy and protects member identities. This protection is especially helpful in a public community where unregistered visitors can access member profiles.

Streamline Customer Support with Community 360

Community 360 informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

Use Custom Visualforce Error Pages for Authenticated Users

If you have customized Visualforce error pages, you can have those pages display for authenticated community users.

Limit Files in Your Community

Restrict the size and types of files that your community members can upload. This whitelist of file types lets you control what your community members upload and also prevents spammers from polluting your community with inappropriate files.

Configure a Custom Domain for Your Community

Set up a custom domain so that your community URLs reflect your company brand.

Add the Global Search Box to Your Customized Community HTML Header

If you customize your Salesforce Communities with an HTML header, you hide the global search box. To take advantage of this search functionality, add a form to your custom header.

Choose a Landing Tab

If you are using the Salesforce Tabs + Visualforce template, you can select a landing tab for your community.

SEE ALSO:

Show Nicknames Instead of Full Names in the Community

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use Custom Visualforce Error Pages for Authenticated Users

Enable Members to Flag Items in Your Community

Enable Reputation in Your Community

Limit Files in Your Community

Show Nicknames Instead of Full Names in the Community

Enabling nickname display in your community allows more privacy and protects member identities. This protection is especially helpful in a public community where unregistered visitors can access member profiles.

All users have nicknames by default, which they can modify by going to *Your Name* > **Edit Contact Info** in the global header or from their Chatter user profile.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Preferences**.
3. Select **Enable nickname display**, then click **Save**.

Nicknames appear in place of first and last names in almost all locations in the community. For example, they appear in feeds, list views, groups, search results, recommendations, and on user profiles and files. The Salesforce app and any community sites activated using community templates show nicknames as well.

A few restrictions to keep in mind about nickname display:

- Private messages display full names. You can choose to turn off private messages to avoid this display.
- Records and user lookups on records show full names. Keep in mind, though, that you can control record and user visibility with sharing rules.
- Mobile notifications in the Salesforce app show full names. You can turn off mobile notifications in the app to avoid this display.
- Searches by first, last, and full names aren't restricted and return matches, but the search results display only nicknames. Global search auto-complete recommendations show any first, last, and full names that the user has searched by or accessed via a record or another location. The recent items list also shows first, last, and full under the same conditions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable nickname display:

- Create and Set Up Communities

  AND

  Is a member of the community

SEE ALSO:

Enable Optional Community Features

Streamline Customer Support with Community 360

Community 360 informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Set Up Community 360

Enable Community 360 in your org and then set it up for each community you have.

Considerations When Using Community 360

When you enable Community 360 in your org, you're allowing data to be gathered from community members and stored in Salesforce. Here are some things to keep in mind when using Community 360.

Set Up Community 360

Enable Community 360 in your org and then set it up for each community you have.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Community 360 in a community:

- Access Community Management OR Manage Communities

  AND

  Is a member of the community

To edit profiles:

- Manage Profiles and Permission Sets

  AND

  Customize Application

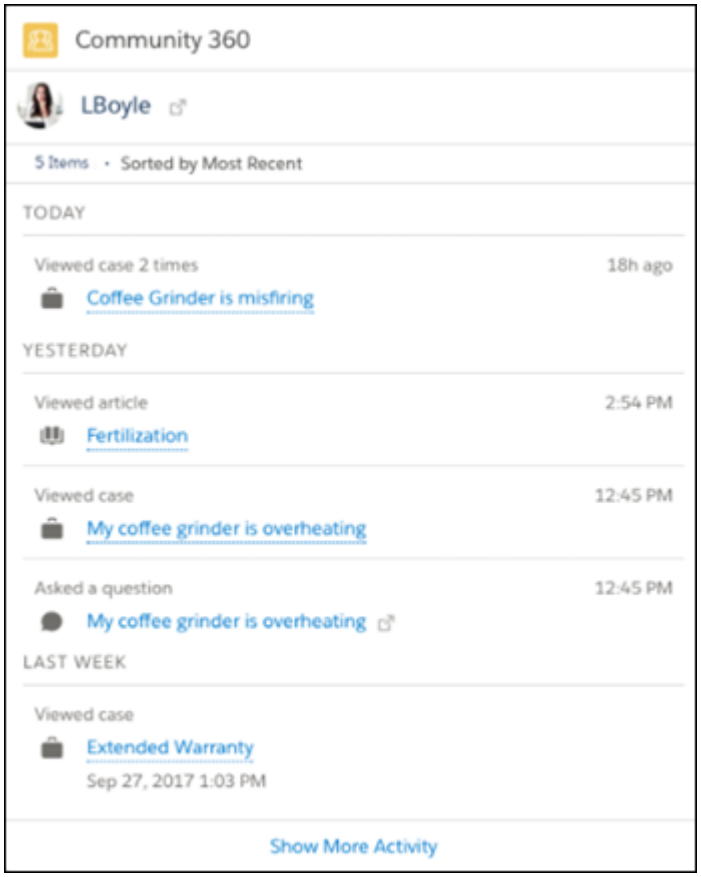
To create and save Lightning pages in Lightning App Builder:

- Customize Application

1. Open Community Workspaces or Community Management.
2. Select **Administration** > **Preferences**.
3. Select **Gather Community 360 data**.

   If you don't see the Community 360 option, it hasn't been enabled. Contact Salesforce Customer Support to enable it.
4. Click **Save**.
5. Assign the **View Community 360** profile permission to the customer support profiles that require it.
6. If you're using Salesforce console in Lightning Experience, open Lightning App Builder and simply drag the Community 360 component to any case or contact page layout.
7. If you're using Salesforce console in Salesforce Classic, add the Community 360 component by placing its Custom Console Component on the contact or case page layout. We recommend placing the component in the left sidebar, stacked, with a 400 pixel width.

   Your support agents see if the customer has opened a case, and which articles have been viewed in a community directly in the Service Console app.



Note:

- Community 360 checks the following: assets, contracts, cases viewed, articles viewed, article votes, posts made, posts viewed, custom objects, orders, products, and tasks.
- Community 360 data is stored in the `NetworkUserHistoryRecent` object. API access to the object is limited to users with the "Modify All Data" permission.
- Community 360 is not available in sandbox environments.

SEE ALSO:

Add Console Components to Page Layouts in Salesforce Classic

Considerations When Using Community 360

When you enable Community 360 in your org, you're allowing data to be gathered from community members and stored in Salesforce. Here are some things to keep in mind when using Community 360.

- Community 360 gathers and stores page views of logged-in community members. Agents can view activity on articles, assets, contracts, custom objects, discussions, orders, products, and tasks.
- With Sentiment Analysis (Pilot) in the Community 360 component, service agents see a positive or negative icon at the top of the console to capture the customer's mood at a glance. The

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

mood is calculated based on the customer's recent posts in the community. The sentiment information helps agents gauge levels of interest in other products or the need to tread carefully.

Note: We provide Sentiment Analysis to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Sentiment Analysis isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

- When you enable Community 360, you are authorizing data to be gathered from all logged-in community members. You can't exclude specific profiles from being tracked.
- Only Salesforce users with the View Community 360 profile permission see the Community 360 data.
- Community 360 isn't supported in communities created using the Salesforce Tabs + Visualforce template.
- Community 360 doesn't track Salesforce for Android and Salesforce for iOS community activity.

Use Custom Visualforce Error Pages for Authenticated Users

If you have customized Visualforce error pages, you can have those pages display for authenticated community users.

To assign or customize your Visualforce error pages, in Community Workspaces or Community Management, click **Administration** > **Pages** and click **Go to Lightning Platform**. The **Error Pages** section lists your current page selections.

When **Use custom Visualforce error pages** is selected, users who are logged in to the community will see your custom Visualforce error pages. When **Use custom Visualforce error pages** isn't selected, users logged in to the community see the default Visualforce error pages. Guest users who aren't logged in to the community always see the custom Visualforce error pages, regardless of whether or not you select the checkbox.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Preferences**.
3. Select **Use custom Visualforce error pages**, then click **Save**.

SEE ALSO:

Assigning Salesforce Site Error Pages

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Limit Files in Your Community

Restrict the size and types of files that your community members can upload. This whitelist of file types lets you control what your community members upload and also prevents spammers from polluting your community with inappropriate files.

Community file moderation must be enabled for your org before you can limit files in your community. If you don't see the option to limit files in Community Workspaces or Community Management, contact Salesforce.

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from the Salesforce app. You can also set community file limits using the SOAP API or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the community in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer community still apply.
- Files uploaded in your internal Salesforce org that are shared in a community aren't subject to community file limits.

1. Open Community Workspaces or Community Management.
2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.
   - `Maximum file size in MB`—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.
   - `Allow only these file types`—Enter file extensions separated with a comma (for example: *`jpg,docx,txt`*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.
3. Click **Save**.

After you set your community's file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

Note: By default, guest user files are blocked from being uploaded. Once developer customizations (Lightning pages, for instance) have been created, admins can change the settings to let guest users upload files. To enable, go to Setup > General Settings, and select Allow site guest users to upload files.

Note: Files uploaded by guest users are unassigned. Unassigned files are public by default. We recommend setting up a trigger to assign an owner to files uploaded by guest users. You may also wish to restrict file upload size or type using community file moderation.

SEE ALSO:

Enable Optional Community Features

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To limit the files in your community:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Configure a Custom Domain for Your Community

Set up a custom domain so that your community URLs reflect your company brand.

Note: HTTPS is required for using a domain with authenticated communities.

1. From Setup, enter *Domains* in the Quick Find box, then select **Domains**.
2. Click **Add a Domain**.
3. Enter the domain name.
4. Choose the HTTPS domain configuration option you want to serve this domain with. Optionally, specify a CNAME value if you're using a non-Salesforce provider to serve your domain.
5. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
6. Click **Save**. To add another domain, click **Save & New**.

If you plan to host more than one community on a domain, you'll need to set up custom URLs for each site. Custom URLs are the way to uniquely distinguish the communities within that domain. From Setup, enter *Custom URLs* in the Quick Find box, then select **Custom URLs**.

USER PERMISSIONS

To view a domain:
- View Setup and Configuration

To add a domain:
- Customize Application OR View Setup and Configuration plus either a Site.com Publisher license or Create and Set Up Communities

To edit or delete a domain:
- Customize Application

Before pointing your domain name's CNAME to a new target name, ensure that the target name exists in the DNS by using `dig` or `nslookup`. The target of your CNAME depends on when you create your domain name.

- To use HTTPS for domain names added before the Summer '13 release, adjust your CNAME to point to the FQDN followed by `.live.siteforce.com` instead of to the org's `force.com` subdomain. For example, if your pre-Summer '13 domain is `www.example.com`, its CNAME target is `www.example.com.live.siteforce.com` instead of `example.force.com`.
- Domain names added in Summer '13 or earlier don't have the 18-character org ID in the CNAME target.
- Domain names added in Summer '13 or later point to the location for setting up HTTPS in a custom domain.
- Domain names added in Winter '14 or later use a CNAME that points to the FQDN followed by your org's 18-character ID and `.live.siteforce.com`. For example, if your domain name is `www.example.com` and your 18-character org ID is `00dxx0000001ggxeay`, its CNAME target is `www.example.com.00dxx0000001ggxeay.live.siteforce.com`.

SEE ALSO:

Manage Your Domains

Manage Domains and Custom URLs

Add a Domain

Add the Global Search Box to Your Customized Community HTML Header

If you customize your Salesforce Communities with an HTML header, you hide the global search box. To take advantage of this search functionality, add a form to your custom header.

You can add the global search box to both templated and Salesforce Tabs + Visualforce communities.

Note: You are automatically redirected to a Classic UI, when configuring this feature in a templated community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. In your customized HTML header, embed a form similar to this one.

```
<form action="/<community name>/search/SmartSearch" method="get">
  <input id="phSearchInput" type="text" name="str"/>
  <input type="submit" value="Search"/>
</form>
```

2. Replace *<community name>* with the unique value you used for the URL when creating the community.

   For example, if you entered *customers* as the unique value for your community URL, the form would look like this example:

```
<form action="/customers/search/SmartSearch" method="get">
  <input id="phSearchInput" type="text" name="str"/>
  <input type="submit" value="Search"/>
</form>
```

Choose a Landing Tab

If you are using the Salesforce Tabs + Visualforce template, you can select a landing tab for your community.

Open Community Workspaces or Community Management. Go to **Administration** > **Tabs**, the first tab in the Selected Tabs list is the landing page.

There are multiple options for the landing tab in your community, and you should select the one that best meets members' needs.

- Chatter tab—If you select this tab, the feed is the first thing members see when they log in. This option is good for communities where people will spend a lot of time in Chatter and won't need a customized home page with additional components. You can also rename the Chatter tab.
- Home tab—If you select this tab, the Salesforce Home tab for your organization is the first thing members see when they log in. The components that display on the tab were added in the Home Page by your administrator. This is a good option if you're not using Chatter or don't want a feed-based home page view.
- Custom Visualforce tab—Selecting this option allows you to build a completely custom landing page.

Set Up SEO for Your Community

Have search engines, such as Google™ or Bing®, index your community so that customers, partners, and guest users can easily discover community pages via online searches. Search Engine Optimization (SEO) can significantly improve discovery for public communities.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Note: All Lightning templates, except Identity, are registered with an SEO service when they are activated. This service also captures any title, description, or metadata that a script loads dynamically.

To set up SEO for your community, it helps to know about a few standard files and SEO properties.

sitemap.xml

The `sitemap.xml` file contains a list of your community page URLs. Search engines use this list to find out which pages of your community are available for crawling and indexing. The sitemap for your community is based on what pages you have made public and what objects you expose in the Guest User Profile.

The file is generated at the root level of your community. To view the site map, navigate to `https://<community_URL>/s/sitemap.xml`.

If your community supports multiple languages, the site map includes an entry for each supported language.

```
<xhtml:link rel="alternate" hreflang="language_code"
href="page_URL?language=language_code" />
```

For example: `<xhtml:link rel="alternate" hreflang="fr" href="https://mycommunity.com/s/?language=fr" />`

You can submit the `sitemap.xml` file directly to search engines, such as Google™ Webmaster Tools and Bing® Webmaster Tools, so that users of those search engines can discover content in your community.

Note: If your community has a path prefix such as *https://<community_URL>/<sub_path>/*, you must create a root-level community and submit both properties to the webmaster tools for the site map to work.

1. Open Setup and navigate to the **Sites** setup page. (Enable Sites for your org if you haven't already.)
2. Confirm that you have a root-level community by reviewing the Site URL column. The address for a root-level community is only *https://<community_URL>* and doesn't have a custom domain name following it like *https://<community_URL>/<sub_path>*.

   If you do not have a root-level community, create one by selecting **New** and accepting the default web address.

robots.txt

The `robots.txt` file uses include and exclude rules to inform web spiders and robots about which areas of your community to index. This standard file is used across the web for SEO and gives you complete control over what is discoverable via search engines.

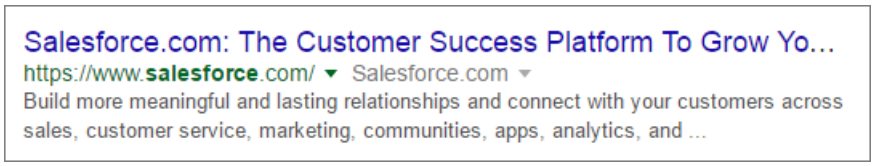
The file is automatically generated if your community exists at the root level without a subpath in the URL. To view the file, navigate to `https://<community_URL>/robots.txt`.

The auto-generated file allows your entire community to be indexed. However, you can limit indexing to specific areas by creating a Visualforce page to host the information.

Note: If `robots.txt` wasn't automatically created, it is quick and easy to do it manually. See Create a Custom robots.txt File for Your Community.

Page title and description properties

The `title` and `description` tags in the page `<head>` are important for SEO because they represent the link title and description that appear in search results pages.



Using the Page Properties area of Community Builder, you can customize the `title` and `description` tags for your community's standard pages. However, some template pages, such as the Article Detail and Topic Detail pages, set these properties dynamically according to the components on the page. For example, the title and description values of the Article Detail page are updated according to the article's title and summary, respectively. Other template pages, such as Messages, do not impact SEO and are not indexed, so the page properties don't list `title` and `description` tags.

Page title and description properties for dynamic pages

Adding tags for static pages in the `<head>` works great, but what about pages that are generated dynamically from a database or ever-changing inventories? We've got you covered so that you don't have to spend your entire day, every day, updating search terms. Using a combination of standard approaches and expressions, SEO management gets a lot easier.

Let's look at the `title` and `description` tags again with the idea of harnessing your Salesforce data to generate pages from records. To make these pages discoverable, you must provide the title and which object it comes from. You can use the following expressions anywhere you see **{ }** next to the name of an input field.

Table 1: Expressions for SEO

Expression	Description
{!Record._Object}	Returns the display name of the object. Output appears in the appropriate language, if available.
{!Record._Title}	Returns the title of the record as defined in the name field. Keep in mind that the name field might have a different label than "Name." Output appears in the appropriate language, if available.
{!Record.*FieldName*}	The value of the specified field for the record. The field name is case-sensitive and includes "__c" for custom fields. You can use this expression only in the SEO component. Output appears in the appropriate language, if available.

Note: Did you notice that the Object and Title expressions look a little different than usual? Use them as they are presented, and they'll work fine. They are unique for this area of Salesforce.

For example, you can display the object name of a record followed by its title: `{!Record._Object}: {!Record._Title}`. Or, add a specific field, such as `{!Record.Description}`.

Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access is enabled in the Community Builder settings so that the Guest User profile has access to the fields displayed.

Custom fields are enabled for the Guest User profile through field-level security (FLS) settings before they can be used in expressions.

If any queried field is restricted (by profile or FLS), the entire record does not load and your expressions do not render on the page. Null field values are returned as empty strings.

Customize meta tags

To optimize search results, you can modify meta tags for both standard and object pages. Choose **Page Properties** for the page. To configure page-level tags for that page, click **Edit Meta Tags** in the SEO section. You can create expressions that display object values from a page record, such as the name, title, and even the value of a specific field. With the ability to create page-level meta tags, it's also easy to add social media tags, for example, by using Open Graph tags.

Note: When you configure page-level tags, you can enter any valid HTML `<meta>` tags. When you add tags to the `<head>` section of your community's pages, for security reasons, you can enter only certain tags, attributes, and values on page 434.

IN THIS SECTION:

Create a Custom robots.txt File for Your Community

The `robots.txt` file uses include and exclude rules to inform web spiders and robots about which areas of your community to index. You can choose which areas of your community to index by creating a Visualforce page to host the information. Search engines use the file to index your community pages.

Make Object Pages Available for Indexing

Attract more visitors to your Lightning community by making an object's records public and available for indexing by search engines.

Provide Search Engines with Fresh Content Snapshots

Salesforce takes a weekly snapshot of your community's published public content, which works well for most updates. But let's say you update a page's content with important, time-sensitive information, such as price changes for a flash sale. Instead of waiting for the weekly update, you can take a snapshot every 24 hours to refresh the page content served to search engines.

Set Your Preferred Domain to Improve SEO Results

Multiple domains for the same community can dilute search engine results and lower page ranking. Choose which domain to use for indexing your community's pages and make duplicate search engine results a thing of the past.

Best Practices for Using SEO in Your Community

Follow these guidelines and best practices when using SEO in your community.

SEO for Communities FAQ

Answers to common questions about using SEO in your community.

SEE ALSO:

- Page Properties and Types in Community Builder
- Field-Level Security
- Add Markup to the Page <head> to Customize Your Community
- Create a Custom robots.txt File for Your Community
- Best Practices for Using SEO in Your Community
- SEO for Communities FAQ
- Set Up Federated Search in Communities

Create a Custom `robots.txt` File for Your Community

The `robots.txt` file uses include and exclude rules to inform web spiders and robots about which areas of your community to index. You can choose which areas of your community to index by creating a Visualforce page to host the information. Search engines use the file to index your community pages.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create a Visualforce page and robots.txt file for your community:

- Create and Set Up Communities

Your custom `robots.txt` file must contain the path to the auto-generated site map—for example, `https://<community_URL>/s/sitemap.xml`. The `robots.txt` file is at the root level of your community.

Note: Confirm that you have a root-level community or create one if you don't.

1. Open Setup and navigate to the **Sites** setup page. (Enable Sites for your org if you haven't already.)
2. Confirm that you have a root-level community by reviewing the Site URL column. The address for a root-level community is only *https://<community_URL>* and doesn't have a custom domain name following it like *https://<community_URL>/<sub_path>*.

   If you do not have a root-level community, create one by selecting **New** and accepting the default web address.

Here's an example of a Visualforce page with indexing rules for a community.

```
<apex:page contentType="text/plain">
User-agent: *
Disallow: /   # hides everything from ALL bots
Allow: /<path-prefix-1>/s  # add path you want to open to bots
Allow: /<path-prefix-2>/s  # add path you want to open to bots
Sitemap: http://<community_URL>/s/sitemap.xml
Sitemap: http://<community_URL>/<sub_path>/s/sitemap.xml
</apex:page>
```

Note: You may have more than one community, each with various subpaths. Keep in mind that they all share the same `robots.txt` file, so be sure that your indexing rules account for the pages in all your communities. The Visualforce page with the `robots.txt` information must be placed at the root-level community.

1. Create a list of include and exclude rules for the areas of your community that you want to expose to or hide from search engines. Save this information in a text file.
2. To create a Visualforce page, in Setup, enter *Visualforce Pages* in the Quick Find box. Then select **Visualforce Pages** and click **New**. Give it any name; you can even call it `robots`.
3. Add your list of indexing rules to the Visualforce page.
4. Click **Save**.
5. From Community Workspaces or Community Management, click **Administration** > **Pages** and click **Go to Lightning Platform**. Then click **Edit** on the Site Details page.
6. In the Site Robots.txt field, enter the name of the Visualforce page you created, or click to search for the file.
7. Click **Save**.
8. Optionally, submit your `sitemap.xml` file to search engines. For example, submit the file to Google™ Webmaster Tools and Bing® Webmaster Tools to allow users of those search engines to discover content in your community.
9. Google™ Webmaster Tools and Bing® Webmaster Tools require some form of verification for your site. One of the most reliable choices is by adding a `<meta>` tag to your community `<head>` markup that the tools sites provide for you.
   a. Open your community from Setup and go to Community Builder.
   b. Click **Settings** and select **Advanced**.
   c. Click **Edit Head Markup**.
   d. Paste the meta tag and attributes provided by the webmaster tools into the Head Markup dialog and click **Save**.
   e. Click **Publish** to make the changes to your community live.

   It can take up to 48 hours for the new header markup to be recognized online.

To confirm that the `robots.txt` file is available for robots and spiders, navigate to `https://<community_URL>/robots.txt`. Similarly, to view the site map, navigate to `https://<community_URL>/s/sitemap.xml`.

SEE ALSO:

- Set Up SEO for Your Community
- Best Practices for Using SEO in Your Community
- SEO for Communities FAQ

Make Object Pages Available for Indexing

Attract more visitors to your Lightning community by making an object's records public and available for indexing by search engines.

The guest user profile controls what unauthenticated users can see in a publicly available community. To make an object's records available for indexing, provide at least read access to that object and its fields.

1. In Community Builder, make sure that the community is publicly available. Select **Public can access the community** in **Settings** > **General**.
   This setting also enables the SEO settings tab.
2. On the SEO settings tab, configure which objects are public using the Guest User Profile.
   a. Click **Guest User Profile**.
   b. Click **Edit**, and in the Standard Object Permissions section, give at least read access to the object.
   c. Save your changes.
   d. In the Field-Level Security section, select **View** beside the object and ensure that the appropriate fields have at least read access.
   e. Save your changes.
3. In Community Builder, create object pages for the object, if they don't exist.
4. Activate your community, if you haven't yet.

   Tip: Always review which objects your Guest User Profile has access to before activating and publishing your community. This best practice controls the scope of your sitemap.xml file, and helps keep your community secure.
5. To make your changes live, publish your community.
   It can take up to 24 hours for the list of available objects to appear, along with the number of indexed records.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Provide Search Engines with Fresh Content Snapshots

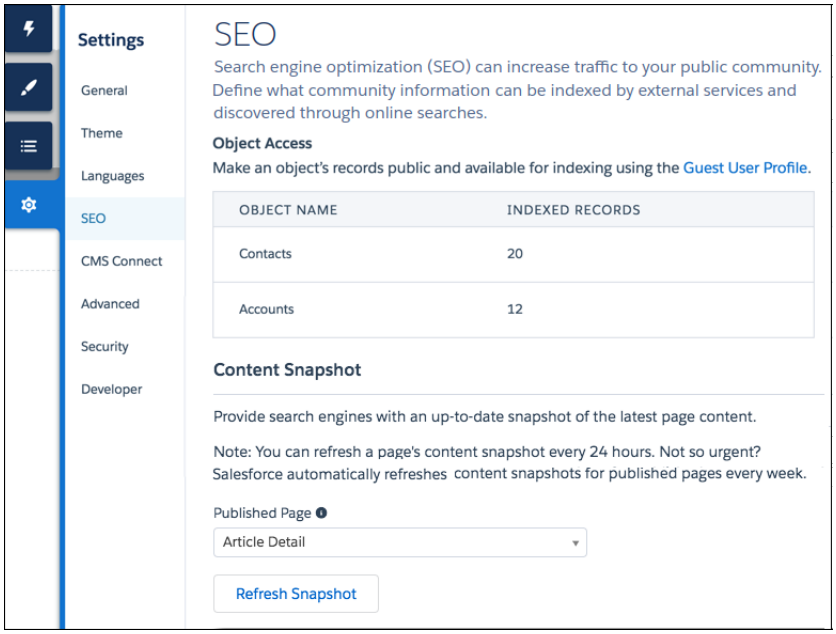
Salesforce takes a weekly snapshot of your community's published public content, which works well for most updates. But let's say you update a page's content with important, time-sensitive information, such as price changes for a flash sale. Instead of waiting for the weekly update, you can take a snapshot every 24 hours to refresh the page content served to search engines.

Tip: The Content Snapshot section appears in Community Builder only after you set a preferred domain for your Lightning community and ensure that your community is publicly available.

1. In Community Builder, update the page's content, and then publish your community to make your changes live.

   You can only take snapshots of published pages.

2. On the SEO settings tab, select the page in the Published Page dropdown.



3. Click **Refresh Snapshot**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create, customize, or publish a community:

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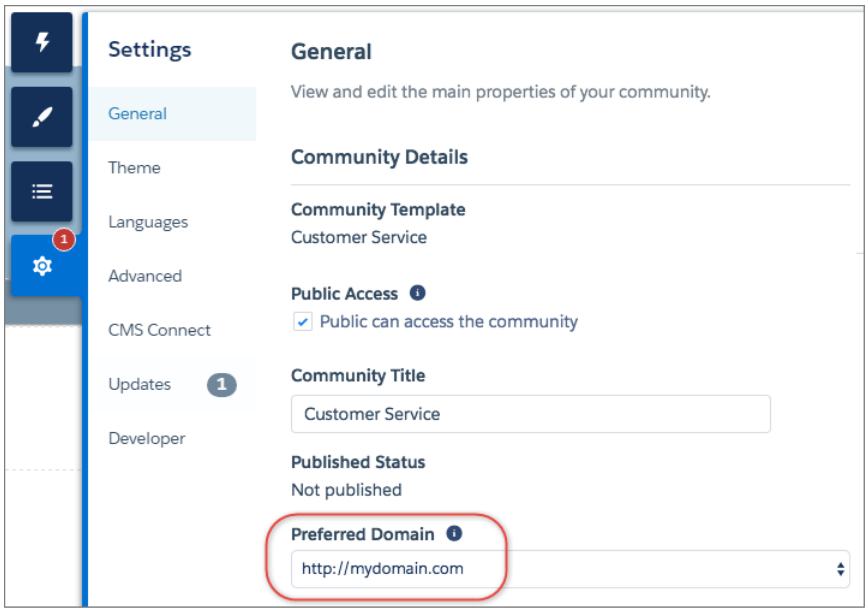
Set Your Preferred Domain to Improve SEO Results

Multiple domains for the same community can dilute search engine results and lower page ranking. Choose which domain to use for indexing your community's pages and make duplicate search engine results a thing of the past.

Tip: The Preferred Domain setting appears in Community Builder only after you set up domains and associate them with your community in Setup.

In Community Builder, go to **Settings** > **General** and select your preferred domain.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, and **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

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Note: If the Require Secure Connections (HTTPS) option is enabled in Site Configuration in Site.com Studio, you can set only HTTPS preferred domains.

Best Practices for Using SEO in Your Community

Follow these guidelines and best practices when using SEO in your community.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

- Don't create a custom site map. Use the auto-generated `sitemap.xml` file instead.
- If you create a custom `robots.txt` file, ensure that it points to the auto-generated site map—for example, `http://<community_URL>/s/sitemap.xml`.
- If your org supports multilingual Knowledge articles, we recommend not replacing the URLs of translated articles with language-specific URLs. Instead, keep the same URL as the base language article.

If your community supports multiple languages, the site map includes an entry for each supported language.

```
<xhtml:link rel="alternate" hreflang="language_code"
href="page_URL?language=language_code" />
```

- In Page Properties, ensure that each page's Title and Description fields have meaningful entries, where applicable. The page title is used in the browser tab or window, search engine results, and bookmarks. Content in the Description field is shown in search engine results to help people quickly decide whether it's the page they want.
- Before submitting the `sitemap.xml` file to search engines for crawling, navigate to `https://<community_URL>/s/sitemap.xml` as an unauthenticated user. We suggest using Google Chrome's incognito mode. Ensure that the URLs listed in the site map are appropriate for guest users.

  If a URL is mistakenly included in the list available to guest users, ensure that the correct permissions are enabled on the guest user profile and that your org is set up correctly. For example, to exclude Case Detail URLs from the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and for the Default Internal Access for Case setting, select **Private**.
- Redirecting HTTP requests to HTTPS is an SEO best practice. Therefore, we recommend against disabling the Require Secure Connections (HTTPS) setting on the Site Details page. To verify that the option is selected, in Community Workspaces or Community Management, click **Administration** > **Pages** > **Go to Lightning Platform**.
- 301 redirects are a great way to ensure that users and search engines are directed to the correct page. For example, for a URL such as `www.my_community.com`, we recommend creating a redirect to `my_community.com`. You can set up these redirects with your DNS provider.

SEE ALSO:

Set Up SEO for Your Community
Page Properties and Types in Community Builder
Create a Custom robots.txt File for Your Community
SEO for Communities FAQ

SEO for Communities FAQ

Answers to common questions about using SEO in your community.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

How often is the sitemap generated?

If a community has been published, is active, and is public, the sitemap XML is regenerated once every 24 hours. You can force a regeneration to begin by publishing new changes to the community.

Why does `sitemap.xml` have references to other site maps?

The auto-generated `sitemap.xml` file is an index file that lists other site maps. The file can contain a limited number of URLs. If your community contains many site map URLs, we partition them into several smaller site map files.

Does the site map include URLs for Salesforce object pages that come with my community template?

If you created a detail page for the object and enabled the object's "Read" permission on the guest user profile, the URLs for the object's pages are included in the site map.

Does the site map include URLs for the custom object pages that I create?

If you created a detail page for the object and enabled the object's "Read" permission on the guest user profile, the URL for the detail page is included in the site map. However, URLs for the list and related list pages aren't included.

How do I exclude the URLs for Case Detail from the site map and prevent them from showing up in search engine results?

To exclude Case Detail URLs from the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and for the Default Internal Access for Case setting, select **Private**.

Why doesn't the auto-generated `robots.txt` file appear when I navigate to `https://`*<community_URL>*`/robots.txt`?

Your community must be at the root level of your custom URL for the auto-generated `robots.txt` file to appear. If you don't have a custom URL set up and you're using the `*.force.com` domain, then a community without the path prefix must exist for `robots.txt` to show up.

How do I override the content of `robots.txt`?

You can override `robots.txt` by creating a Visualforce page to host the information.

Can I remove the `/s/` from the default community URL?

No, the `/s/` is required in the default community URL.

Is URL rewriting for creating custom vanity URLs supported?

No, URL rewriting isn't supported for template-based communities.

Does each article have its own URL?

Yes, each article that appears in the Article Detail page has its own URL, which is retrieved from the Knowledge article's `URL Name` field.

Article URLs use the format */article/:urlName*. However, the article's *recordId* is available for components on the Article Detail page, like the Article Content component, for use. The *recordId* on the page is set to the most recent Knowledge Article Version ID for a published article, uniquely defined by the URL Name and, if present, the translation language.

Tip:

- If your org has custom components that rely on the article's `urlName`, update the components to use `recordId` instead.
- If your org supports multilingual Knowledge articles, we recommend not replacing the URLs of translated articles with language-specific URLs. Instead, keep the same URL as the base language article.

Can I add titles and descriptions to articles for SEO purposes?

Each Knowledge article has a `URL Name`, a `Title`, and a `Summary` field. When the article is displayed in the Article Detail page in Community Builder, these fields are used for the page URL and the`title` and `description` tags in the page `<head>`, respectively.

The `title` and `description` tags in the page `<head>` are important for SEO because they represent the link title and description that appear in search results pages.

How are non-canonical URLs for object pages handled?

To improve your community's SEO ranking, we redirect non-canonical URLs to canonical URLs using 301 redirects. A canonical URL lets you tell search engines that slightly different URLs, which all point to the same content, are actually the same thing. A 301 redirect indicates that a URL has been permanently moved, which is optimal for SEO.

For example, let's say you add object pages for the Account object. In this case, the detail page has an object-specific Account Detail page and a generic Record Detail page. When community members access the generic Record Detail page (`/s/detail/`*recordId*), they're permanently redirected to the canonical URL of the object-specific Account Detail page instead (`/s/account/`*recordId*). Similarly, 301 redirects are used for list and related list pages.

Note: URL redirects occur only when a URL is accessed directly from the browser URL bar or from a link that's external to your community.

How are SEO-friendly URLs created for object detail pages?

To create a user-readable URL for the detail page of a standard or custom object, we append the value of the object's Name field to the URL. For example, for AW Computing's Account Detail page, we redirect `https://mycommunity.com/s/account/001R0000002NzuaIAC` to `https://mycommunity.com/s/account/001R0000002NzuaIAC/aw-computing`.

Where the Name field isn't available, we use the Subject or Title fields. Otherwise, we append "detail" to the URL.

Note: The Case, Dashboard, Group, Report, and User Profile objects aren't supported.

How do I get analytics for material that is brought in using CMS Connect?

Remember, the content you display in your community when using CMS Connect (JSON) doesn't live in your community. This means getting usage data requires a few extra steps.

Configure External Objects for the data that you are interested in tracking using Salesforce Connect or OData, Salesforce Reporting.

SEE ALSO:

Set Up SEO for Your Community

Create a Custom robots.txt File for Your Community

Best Practices for Using SEO in Your Community

Customize Login, Self-Registration, and Password Management for Your Community

Configure the default login, logout, password management, and self-registration options for your community. Or customize the behavior with Apex and Visualforce or Community Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

By default, each community comes with default login, logout, password management, and self-registration pages. Salesforce also includes associated Apex controllers that drive this functionality under the hood. You can use Community Builder or Visualforce to create custom branding and change the default behavior.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Brand Your Community's Login Page

You can brand the default login page that comes with your community. For example, you can use your own logo, change background colors, add a custom footer, and even change the content on the right side of the login page.

Create Dynamic Branding URLs

You can use dynamic branding to customize your community's login experience at run time. For example, you can change which logo to display depending on whether the user is an employee or customer. Or display a particular self-registration page based on the user's country code.

Customize Your Community's Login Experience

Customize your community's login experience—the experience that external users embark on when they log in to your site—from the Administration Login & Registration page. You can customize the default login page or the page you create with the Community Builder or Visualforce. For example, you can choose which login page to use, allow internal users to log in directly to your community, and set up support for multiple authentication providers and single sign-on.

Redirect Members to a Custom URL on Logout

When community members log out, they're taken to your community login page by default. You can choose to redirect them to a different location, such as your company website. Specify the URL to which community members are redirected when they log out from your community.

Use Custom Change Password and Forgot Password Pages in Your Community

You can customize Forgot Password and Change Password pages from the Workspaces Administration Login & Registration page. Or you can create custom password pages in Visualforce. You can also customize the default password templates in Visualforce.

Set Up Self-Registration for Your Community

Enable self-registration to allow unlicensed guest users to join your community. When your users self-register, you can choose to save them as contacts under a business account or create a person account for each self-registering user.

Customize Code for Lightning Components on Login Pages

To add custom logic to the Login pages in Lightning communities, customize the Lightning component for those pages.

Brand Your Community's Login Page

You can brand the default login page that comes with your community. For example, you can use your own logo, change background colors, add a custom footer, and even change the content on the right side of the login page.

Note: You can specify dynamic branding URLs so that the login page is different depending on who logs in and from where.

1. From Setup, enter *All Communities* in the Quick Find box, then click **All Communities**.
2. Next to the name of your community, click **Workspaces**.
3. Select **Administration**, and then select **Login & Registration**.
4. To change the logo, select whether the image is a file or URL.
   a. If you're using a file, choose the logo from your file system.

      You can use a GIF, JPG, or PNG file up to 100 KB. The image dimensions can be up to 250 px by 125 px.

      When you upload a logo, it is saved in a Communities Shared Document Folder on the Documents tab. You can't delete this folder.

   b. If you're using a logo at a fixed URL, enter the location.

   c. If you're using different logos for dynamic branding, create a URL with the dynamic experience ID parameter *{expid}*, for example, `https://universaldistributing.com/{expid}_logo.png`. The admin modifies the login URLs to pass the expid signal. When a user logs in, the value replaces the *{expid}* portion of the logo URL, for example, `https://universaldistributing.com/internal_logo.png`.

   d. If you create dynamic logos and right-frame URLs, modify your login implementation to direct the user to the appropriate login URL based on the run-time situation.

   Your logo appears in the top left of the login page.
5. Select the background color of the login page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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The color you choose appears as the background on the left side of the login page.

6. Enter the right-frame URL to the right-side content of the login page.

   The right-frame URL can be fixed or dynamic. A dynamic URL works the same as a dynamic logo.

   a. If the right-frame content is a fixed URL, enter the location.

   b. If the right-frame content is dynamic, create a URL with the `{expid}` experience ID parameter.

   An inline frame (iframe) is created on the right side of the login page to display the content specified in the URL.

7. Enter your text for the community login page footer, up to 120 characters.

   The default login page displays a footer at the bottom. If you're creating a custom login page, create your own footer.

8. Click **Save**.

The login page appears to all internal users, customers, partners, and guests according to the branding you choose. Behind the scenes, you (or your developer) update your login implementation to specify how to pass the `{expid}` value to the login URL. For example, add logic to your login button so that when `expid = INTERNAL`, the login button redirects the user to the login URL `https://universaldistributing.com/brands/expid=INTERNAL`.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Community

Create Dynamic Branding URLs

Customize the Default Login Process with Apex

Create Dynamic Branding URLs

You can use dynamic branding to customize your community's login experience at run time. For example, you can change which logo to display depending on whether the user is an employee or customer. Or display a particular self-registration page based on the user's country code.

When using dynamic branding to customize the login experience, it applies to the entire login process: the initial login page plus related pages, such as two-factor authentication or a login flow. You can add dynamic branding to Community Builder, Visualforce, and custom login pages.

Use dynamic URLs for your login pages to present a different look and behavior based on the run-time situation. For example, different logos appear depending on who the user is or where the user's logging in from. Dynamic branding relies on a URL parameter called the experience ID. The `{expid}` determines what the user experiences. At run time, the `{expid}` resolves to the current value, and the appropriate URL is created.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Here's a scenario. Universal Distributing wants to brand the login experience depending on whether the user is internal or external. You create logos for each brand, appropriately named `internal_logo.png external_logo.png`. Then you set the logo URLs so that internal users see `http://.../internal_logo.png` and external users see `http://.../external_logo.png`.

From the Administration Login & Registration page, you specify the logo URL with the `{expid}`: `https://universaldistributing.com/{expid}_logo.png`.

When an external user logs in, `{expid}` is set to external, the URL becomes `https://universaldistributing.com/external_logo.png`, and the external logo appears on the login page. Likewise, when an internal user logs in, `{expid}` is set to internal, the URL becomes `https://universaldistributing.com/internal_logo.png`, and the internal logo appears on the login page.

You define dynamic branding URLs for logos and right-frames on the Community Workspaces Administration Login & Registration page. They apply to default and custom login pages.

In addition to setting the experience ID, your login implementation must set the login URL according to the value of the experience ID. For example, by adding the logic to your login button, when `expid=INTERNAL`, the login button directs the user to `https://universaldistributing.com/brands/expid=INTERNAL`.

You can also use Visualforce and Apex to create dynamic URLs. Use the Apex `getExperienceId` method of the `System.Site` class to retrieve the value of the experience ID. To set the experience ID, use the `setExperienceId` method, or add an experience ID dynamic parameter to one of these login endpoints.

For example, use the `CommunitiesSelfReg` endpoint to pass in a different *`{expid}`* value to the self-registration page to deliver a different registration flow for each brand.

- ***`community-url`***`/services/oauth2/authorize/expid_`***`value`***
- ***`community-url`***`/idp/endpoint/HttpPost/expid_`***`value`***
- ***`community-url`***`/idp/endpoint/HttpRedirect/expid_`***`value`***
- ***`community-url_login_page`***`?expid=`***`{value}`***
- ***`community-url`***`/CommunitiesSelfReg?expid=`***`{value}`***
- ***`community-url`***`/.well-known/auth-configuration?expid=`***`{value}`***
- ***`secur`***`/forgotpassword.jsp?expid=`***`{value}`***
- ***`community-url`***`/services/auth/test/`***`authentication_provider`***`/?expid=`***`{value}`***
- ***`community-url`***`/services/auth/sso/`***`authentication_provider`***`/?expid=`***`{value}`***
- ***`community-url`***`/services/auth/link/`***`authentication_provider`***`/?expid=`***`{value}`***
- ***`community-url`***`/services/auth/oauth/`***`authentication_provider`***`/?expid=`***`{value}`***
- ***`community-url`***`/services/auth/authcallback/`***`authentication_provider`***`/?expid=`***`{value}`***

Customize Your Community's Login Experience

Customize your community's login experience—the experience that external users embark on when they log in to your site—from the Administration Login & Registration page. You can customize the default login page or the page you create with the Community Builder or Visualforce. For example, you can choose which login page to use, allow internal users to log in directly to your community, and set up support for multiple authentication providers and single sign-on.

External users are users with Community, Customer Portal, or partner portal licenses. Also, external users are users with the External Identity license.

Note: Use dynamic branding URLs to customize the user's login experience at run time. Dynamic branding applies to the entire login process—the initial login page plus related pages, such as two-factor authentication, Terms & Conditions, or login flow. You can add dynamic branding to default, Community Builder, Visualforce, and custom login pages.

- If your community uses the Salesforce Tabs + Visualforce template, the login page assigned to the community by default is called `CommunitiesLogin`. Use Community Builder or Visualforce to customize its appearance.
- If your community uses the Customer Service template, the login page assigned to the community by default is called `Login`. Use Community Builder to customize its appearance.
- To update the login behavior for Visualforce and Community Builder pages, update the `CommunitiesLoginController` Apex controller.
- If you create a custom login page, you must first modify the `CommunitiesLoginController` Apex controller and the `Site.login()` Apex method before you can assign it to a community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

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- If you create dynamic logos and right-frame URLs, modify your login implementation to direct the user to the appropriate login URL based on the run-time situation.
- You must publish custom Community Builder pages before you can assign them to a community.
- The login page you select in Community Workspaces overrides other login page assignments in Site.com or Salesforce site settings.

Follow these steps to set up the Login section of the Login & Registration page.

1. From Setup, enter *All Communities* in the Quick Find box, then click **All Communities**. Click **Workspaces** next to the name of your community.
2. Select **Administration**, then select **Login & Registration**, and make your changes under the Login section.
3. Optionally, choose a custom login page for your community. Select the page type, **Community Builder** or **Visualforce**. Then enter the name of the page in the search field, and click . In the search results window, click the name of the page to select it.

   Tip: To revert to the default login page for your community's template, select **Default Page**.

4. Optionally, select **Allow internal users to log in directly to the community**. This setting allows your internal users to use their internal username and password on the community login page.

   Internal users must be members of the community to log in directly from the community login page. After they log in, your internal users land on the community home page.

5. Select which login options to display.

   By default, users log in to the community using the default community username and password. If you want to allow them to log in with other credentials, such as their Facebook©, Google©, or Salesforce credentials from another org, select them from the list.

   Important: Configure authentication provider options in advance to use them for community logins. From Setup, enter *Auth. Providers* in the Quick Find box, then select **Auth. Providers**.

6. Optionally, allow external users to log in with SAML single sign-on (SSO).

   SSO is available only if your org has set up SAML for your community on page 150. Setting up SSO requires:

   - An Identity Provider Login URL.
   - A subdomain created with My Domain. After setting up the subdomain, your application and login page URLs begin with the name of the subdomain, for example, `https://mysubdomain.my.salesforce.com/`.

   Note: If you enabled Single Sign-On, you can redirect users to a specific page after they have logged in to Salesforce, by adding a startURL parameter to the networkId url. To redirect your customers to a specific page, add the following parameter to your company url: */servlet/networks/switch?networkId=<your 18 digit salesforce community ID, which can be found at the end of the community url>&startURL=<url of specific page you want to direct customers to>*

   To offer multiple SAML single sign-on options, enter *Single Sign-On Settings* in the Quick Find box, select **Single Sign-On Settings**, and then click **Enable Multiple Configs**. If you already had SAML enabled, and you then enabled multiple SAML configurations, your existing SAML configuration is converted to work with multiple configurations.

   Users see the option **Log In with Single Sign-On**. If you have enabled multiple SAML single sign-on options, each login option is labeled with the name of each SAML configuration.

7. Click **Save**.

Note: Don't rename or delete the default login page. It can cause problems with the default community login flow.

IN THIS SECTION:

Use Login Discovery to Simplify Login

If you want external users to log in with another identifier than their username, such as a phone number or email address, configure your community with the Login Discovery Page. After users enter the identifier, they are challenged to verify themselves. For example, they might need to enter a verification code sent via email or text. If the user correctly enters the code on the Verify page generated by Salesforce, the user is logged in to your community. If SSO-enabled, Login Discovery can send the user directly to the identity provider login page. With Login Discovery, users can identity themselves using an email address or phone number. It also supports custom identifiers, such as an employee number or federation ID, in Apex.

Customize the Default Login Process with Apex

You can provide community members with a custom login page that reflects your org's style and branding. To change the look, customize the `CommunitiesLogin` login page, or create your own Visualforce page. To change login behavior, modify the `CommunitiesLoginController` Apex controller.

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Create Dynamic Branding URLs

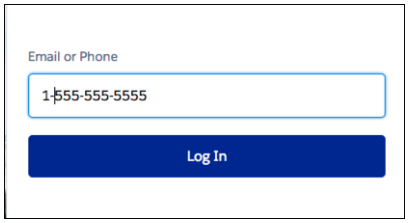
Customize Login, Self-Registration, and Password Management for Your Community

Use Login Discovery to Simplify Login

If you want external users to log in with another identifier than their username, such as a phone number or email address, configure your community with the Login Discovery Page. After users enter the identifier, they are challenged to verify themselves. For example, they might need to enter a verification code sent via email or text. If the user correctly enters the code on the Verify page generated by Salesforce, the user is logged in to your community. If SSO-enabled, Login Discovery can send the user directly to the identity provider login page. With Login Discovery, users can identity themselves using an email address or phone number. It also supports custom identifiers, such as an employee number or federation ID, in Apex.

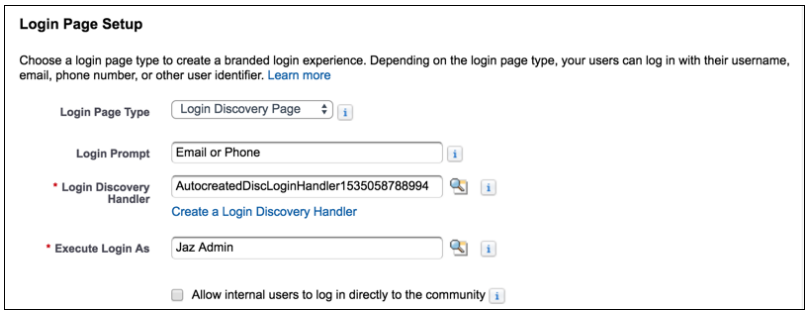
For an introduction to Login Discovery, watch A Mobile-First World Requires Mobile-First Login.

Create a Login Discovery Page to prompt users to log in with their email address, phone number, or a custom identifier.



1. From Setup, enter `All Communities` in the Quick Find box, then click **Workspaces** next to your community.
2. Select **Administration**, and then select **Login & Registration**.
3. Under Branding Options, customize the login page with your own logo, colors, and background.

   For details, see Brand Your Community with the Login & Registration Page.
4. For Login Page Type, choose **Login Discovery Page**.



5. For Login Prompt, enter the text that you want to appear as the prompt on your login page.

   For example, enter `Email Address or Phone Number`. You can localize the login prompt with a custom label. Use the `$Label` global variable, for example, `$Label.loginPrompt`.
6. Leave the Login Discovery Handler blank.
7. Click **Create a Login Discovery Handler**.

   Salesforce generates a default login discovery handler after you save the page. But continue to fill out the page before you save it.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To create and edit Visualforce pages:

- Customize Application

To edit Apex classes:

- Author Apex
- AND Customize Application

8. For Execute Login As, choose an admin with Manage Users permission.

   Execute Login As provides the context in which the Login Discovery handler runs. By assigning a user to the handler, operations performed by the handler are easily traced back to the login process. In production, you typically create a system user for the Execute Login As user.

9. Make sure that **Allow internal users to log in directly to the community** isn't selected.

   The Login Discovery Page doesn't support internal users (employees) logging in to the community directly. However, you can customize the handler to redirect users to an IdP. For internal users, you can set up Login Discovery with My Domain. From your My Domain Authentication Configuration settings, set the login page type to Discovery.

10. Click **Save**.

    Salesforce generates a default login discovery handler and populates the Login Discovery Handler field with its name. This handler accepts an email address or phone number from the login page and emails or texts a verification code to the user. If the user's email or phone number isn't verified, the user is prompted for a password.

You can modify the Login Discovery handler in Apex to extend its functionality. For details, see the `Auth.LoginDiscoveryHanlder`Interface in the *Apex Developer Guide*.

Note: To support text-message verification, you purchase a license for Identity Verification Credits. This usage-based license provides your org a predetermined number of SMS messages for identity verification.

Customize the Default Login Process with Apex

You can provide community members with a custom login page that reflects your org's style and branding. To change the look, customize the `CommunitiesLogin` login page, or create your own Visualforce page. To change login behavior, modify the `CommunitiesLoginController` Apex controller.

Note: To customize the Default login page or Community Builder login page, you update the `CommunitiesLoginController` handler in Apex by following these steps. To customize the LoginDiscovery login page, modify the `Auth.LoginDiscoveryHandler` interface as described in the *Apex Developer Guide*.

USER PERMISSIONS

To create and edit Visualforce pages:
- Customize Application

To edit Apex classes:
- Author Apex

  AND

  Customize Application

1. From Setup, enter *`Apex Classes`* in the Quick Find box, then select **Apex Classes**.
2. Next to `CommunitiesLoginController`, click **Edit**.
3. Add the following code.

```
global PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

4. If you created a custom login page, replace `SiteLogin` with the name of your Visualforce page.
5. Click **Save**.
6. Click **Edit** next to `CommunitiesLandingController`.
7. Add the following code.

```
public PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');
```

```
        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

8. If you created a custom login page, replace `SiteLogin` with the name of your Visualforce page.
9. Click **Save**.
10. From Setup, enter *Visualforce Pages* in the Quick Find box, then select **Visualforce Pages**.
11. Click **Edit** next to `CommunitiesLogin`.
12. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

13. Click **Save**.
14. Click **Edit** next to `CommunitiesLanding`.
15. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

16. Click **Save**.

Redirect Members to a Custom URL on Logout

When community members log out, they're taken to your community login page by default. You can choose to redirect them to a different location, such as your company website. Specify the URL to which community members are redirected when they log out from your community.

1. From Setup, enter *All Communities* in the Quick Find box, then click **All Communities**. Click **Workspaces** next to the name of your community.
2. Select **Administration**, then select **Login & Registration**.
3. Under Logout, enter the URL where you want your community members to go after they log out.
4. Click **Save**.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Community

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Use Custom Change Password and Forgot Password Pages in Your Community

You can customize Forgot Password and Change Password pages from the Workspaces Administration Login & Registration page. Or you can create custom password pages in Visualforce. You can also customize the default password templates in Visualforce.

Note: You can use dynamic branding URLs to specify a branded forgot password page. With dynamic branding, you can control which password page a user sees when logging in to your community.

To use a custom Community Builder Forgot Password page, first publish your login page in Community Builder.

1. From Setup, enter `All Communities` in the Quick Find box, then click **All Communities**. Click **Workspaces** next to the name of your community.
2. Select **Administration**, then select **Login & Registration**.
3. Under Password, select the page type, enter the name of the page in the search field, and click . In the search results window, click the name of the page to select it.
4. Click **Save**.

To revert to the default password page for your community's template, select **Default Page** as the page type.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Create Dynamic Branding URLs

Customize Login, Self-Registration, and Password Management for Your Community

Set Up Self-Registration for Your Community

Enable self-registration to allow unlicensed guest users to join your community. When your users self-register, you can choose to save them as contacts under a business account or create a person account for each self-registering user.

You can set up self-registration for your community from Community Workspaces.

Note: You can specify dynamic branding URLs when you customize the self-registration form. This way, you can control which registration form a user sees depending on who is accessing the community and from where.

Follow these steps to let guests join your community.

1. From Setup, enter `All Communities` in the Quick Find box, then click **Workspaces** next to the name of your community.
2. Select **Administration**, then select **Login & Registration**.
3. Under Registration Page Configuration, select **Allow external users to self-register**.

   The L&R page now displays fields for setting up self-registration.
4. From Registration Page Type, choose a self-registration page from the list.

   Each self-registration page type has advantages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

- Configurable Self-Reg Page—Gives you the ability to decide which identifiers guests register with, such as an email address, phone number, or username. You choose whether to require them to verify their identity and the information to collect when they register. With this page, you make it easy for guests to sign up by not requiring a username and password. The Configurable Self-Reg Page is branded according to the options set on the L&R page.
- Community Builder Page—Lets you use the Community Builder to manage and brand your self-registration page. This page requires users to register a username and password.
- Default Page—Gives you a simple self-registration page with basic styling. It's intended to serve as a starting point to customize the look and behavior of self-registration.
- Visualforce Page—Let's you enable the custom Visualforce page that you created to control the self-registration process.

a. If you choose Configurable Self-Reg Page, follow these instructions to set up self-registration.

b. If you choose Community Builder Page, click and select **Register** from the list. If Register isn't listed, return to Community Builder and click **Publish**.

c. If you choose Visualforce Page, click and select the appropriate Visualforce page from the list.

d. If you choose Default Page, you have a simple self-registration page.

With the Default Page, you can return to the default values when trying out different self-registration options.

5. Select the default profile to assign to self-registering users.

Note: You can only select profiles that are associated with the community. If the selected profile is removed from the community, the Profile resets to None.

6. Select the account that you want to assign self-registering users to.

The self-registering user is assigned as a contact of the account you specify. Ensure that the account you use is enabled as a partner. Go to the account, click **Manage External Account**, and click **Enable as Partner**.

If your org uses person accounts, leave this field blank. Then create a person account for each self-registering user.

7. Click **Save**.

After you set up self-registration, a Sign Up link appears on your community login page. When clicked, it directs external users to the self-registration page. When a user self-registers to join your community:

- Salesforce creates a user record with the information provided on the self-registration page.
- The user is assigned the profile that you specified when you set up self-registration.
- The user is associated with a business account or a person account, depending on how you set up your org.
- If a user attempts to self-register under a username already in use, they will get an error message. Salesforce administrators will not be notified when the error occurs.

Note: When a user self-registers, the user consumes one of your Communities licenses. When setting up your self-registration page, add criteria to ensure that the right people are signing up. To prevent unauthorized form submissions, we recommend that you use a security mechanism, such as CAPTCHA or a hidden field, on your self-registration page.

IN THIS SECTION:

Create Person Accounts for Self-Registering Users

If your business deals mostly with individuals, instead of creating them as contacts under a single business account, you can assign each self-registering user to a person account.

Use the Configurable Self-Reg Page for Easy Sign-Up

You can use the default self-registration page to sign up visitors with a username and password. But to give visitors a simpler, mobile-centric self-registration experience, use the Configurable Self-Reg Page. With this self-registration page, users can sign up with only an email address or phone number, instead of having to create a username and password. With this lightweight sign-up process, you can limit the amount of information that you collect from the users when they sign up. On subsequent logins, you can get more information, building a member's profile through progressive profiling powered by the login flow.

Verify Member Identities for Community Self-Registration

When users sign up for your community with an email address or phone number, Salesforce sends them a verification code and generates the Verify page. The Verify page is where users confirm their identity, and you can replace the default Verify page with your own using Visualforce and a couple of Apex methods. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

Customize the Community Self-Registration Process with Apex

You can change how external users register for your community by modifying the default self-registration controller or by replacing it with your own custom self-registration controller. However, it's easier to modify the generated Configurable Self-Reg handler created when you choose Configurable Self-Reg Page from the Community Workspaces Administration Login & Registration page.

SEE ALSO:

- Customize Code for Lightning Components on Login Pages
- Create Dynamic Branding URLs
- Customize the Community Self-Registration Process with Apex
- Create Person Accounts for Self-Registering Users

Create Person Accounts for Self-Registering Users

If your business deals mostly with individuals, instead of creating them as contacts under a single business account, you can assign each self-registering user to a person account.

Important: Contact Salesforce Customer Support to enable Person Accounts. Only External Identity, Customer Community, and Customer Community Plus licenses support the creation of person accounts.

You set up self-registration for person accounts from your community's Login & Registration page. Under Registration, select **Allow external users to self-register**. Make sure that the **Account** field is empty. When you remove the Account information, new users are created as person accounts.

Salesforce creates a separate person account for each self-registering user. Each user is assigned the default profile you specified while setting up self-registration. You can customize the self-registration functionality with the self-registration Apex controller (`CommunitiesSelfRegController`), but it's not required.

You can also manually create person accounts and assign them to community users with Customer Community and Customer Community Plus licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

- Person Accounts
- Enable Person Accounts

Use the Configurable Self-Reg Page for Easy Sign-Up

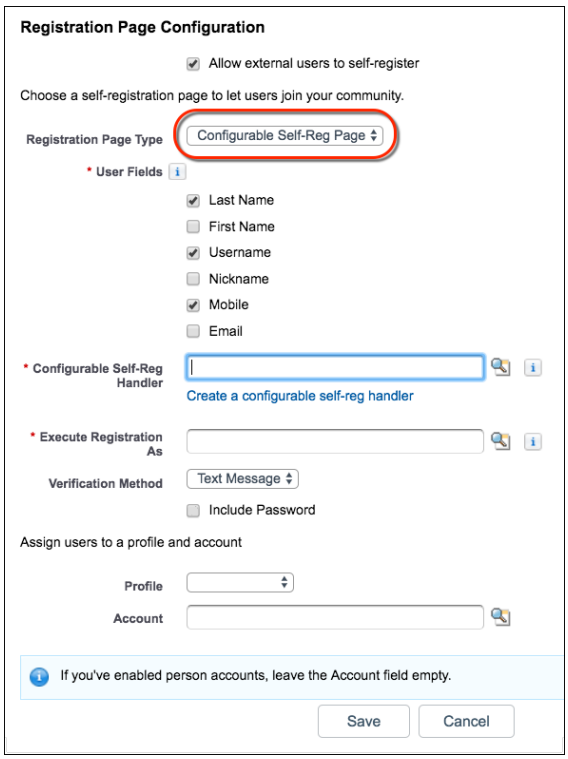
You can use the default self-registration page to sign up visitors with a username and password. But to give visitors a simpler, mobile-centric self-registration experience, use the Configurable Self-Reg Page. With this self-registration page, users can sign up with only an email address or phone number, instead of having to create a username and password. With this lightweight sign-up process, you can limit the amount of information that you collect from the users when they sign up. On subsequent logins, you can get more information, building a member's profile through progressive profiling powered by the login flow.

Create a configurable sign-up page from your community's Workspaces Login & Registration page. It's available when you create the login page using a Login Discovery Page, Visualforce Page, or Default Page. If your login page type is a Community Builder Page, Configurable Self-Reg Page isn't available.

For an introduction to configurable self-registration, watch A Mobile-First World Requires Mobile-First Login.

1. From Setup, enter `All Communities` in the Quick Find box, then click **Workspaces** next to your community.
2. Select **Administration**, and then select **Login & Registration**.
3. Select **Allow external users to self-register**.
4. For Registration Page Type, select **Configurable Self-Reg Page**.

   The Login & Registration page displays fields for setting up self-registration.



5. For User Fields, select which fields to display on the self-registration page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To create and edit Visualforce pages:

- Customize Application

To edit Apex classes:

- Author Apex
- AND Customize Application

Users are required to supply this information when they register. If the information isn't supplied, the handler populates the fields with dummy values. For example, if a last name isn't requested at sign-up, the user is assigned a last name like ExternalUser1550768707871.

6. Leave Configurable Self-Reg Handler blank.
7. Click **Create a configurable self-reg handler**.

   Salesforce generates a self-registration handler after you save the page. But continue to fill out the page before you save it.
8. For Execute Registration As, choose a Salesforce admin with Manage Users permission.

   Execute Registration As provides the context in which the Configurable Self-Reg handler runs. By assigning a user to the handler, operations performed by the handler are easily traced back to the registration process. For example, if a contact is created, this user creates it. In production, you typically create a system user for the Execute Registration As user.
9. For Verification Method, if you want visitors to verify their identity when they sign up, select either **Email** or **Text Message**.

   To require users to enter a password when they log in, select **None**.

   The verification method is independent of the user fields you select. For example, if you select **Email** as a user field and **None** as the verification method, Salesforce collects the user's email address, prompts for a password instead of sending a verification code.
10. If you want users to create a password when they sign up, select **Include Password**.

    When selected, the sign-up page contains Password and Confirm Password fields. Even if you set up email or text verification, you could collect a password at sign-up as a precaution. For example, if text-message verification is required but the mobile device isn't available, the user can log in with a password.

    Note: If you select **None** as the verification method, you must select **Include Password**. Otherwise, the new user can't log in.

    If you don't select Include Password, Salesforce generates a random password when the user is created.
11. For Profile, select a profile configured for your org, such as an External Identity, Customer Community User, or Partner Community User profile.
    This setting assigns new users a profile to control access. The profile selected here is passed to the Configurable Self-Reg handler. Unless modified, the new user is assigned this profile. If you don't specify a value here, make sure that your handler sets a user profile explicitly before inserting a user. Every user requires a profile.
12. For Account, choose the account to contain your community members. Each member is listed as a contact in the account.
    The account selected here is passed to the Configurable Self-Reg handler. Leave the field blank if your org is set up for Person accounts. If you want, you can override Account in Apex. For example, you can disassociate external users from accounts to create contactless users.
13. Click **Save**.
    Salesforce generates a configurable self-registration handler and populates the Configurable Self-Reg Handler field with its name. The resulting sign-up form prompts users to register with the user fields that you selected. A user is created only if identity verification is successful.
14. Check whether self-registration works.
    a. From a private (incognito) browser, open your community login page.
    b. Click **Sign Up**, and register a new user.
    c. If prompted for an email address or phone number, enter your own to complete the verification process.
    d. If verification succeeds, you are directed to the start page configured for your community, typically the community's home page.

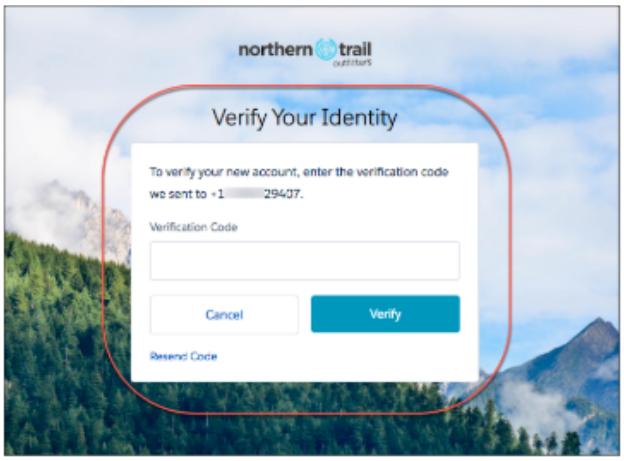
You can modify the handler in Apex to extend its functionality. For example, you can add logic to ensure that the new member's email address and phone number are unique in your org. You can also control how the user is created and populate fields on the self-reg form with your values. However, the handler can't change the prompts on the self-registration form. These prompts are determined by the user fields selected on the Login & Registration page, such as First Name, Last Name, and so on.

To modify the Configurable Self-Reg handler in Apex, see the `Auth.ConfigurableSelfRegHandler` Interface in the *Apex Developer Guide*.

Verify Member Identities for Community Self-Registration

When users sign up for your community with an email address or phone number, Salesforce sends them a verification code and generates the Verify page. The Verify page is where users confirm their identity, and you can replace the default Verify page with your own using Visualforce and a couple of Apex methods. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

Salesforce actually supplies two default Verify pages, one for email and one for SMS verification. For convenience, you can brand the default Verify pages with your logo, colors, and background, but you can't change the form itself. Here's the default Verify page for SMS verification.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. To replace the default Verify page with your own, create a Visualforce page. Include the Apex methods `System.UserManagement.initSelfRegistration` and `System.UserManagement.verifySelfRegistration`.

   `System.UserManagement.initSelfRegistration` initiates a verification challenge and includes a user object to be inserted after successful registration. `System.UserManagement.verifySelfRegistration` completes the verification, and if successful, the user is created and logged in. The method returns the `Auth.VerificationResult`, which contains the verification status and session ID after the user is created.

2. From Workspaces, set up community self-registration with the **Email** verification method.
   a. From Setup, enter *`All Communities`* in the Quick Find box, and then select **All Communities**. Next to your community, click **Workspaces**.
   b. Select **Administration**, and select **Login & Registration**.
   c. For Registration page type, select **Configurable Self-Reg Page**.
   d. For Verification Method, choose **Email**.

3. Optional. Create a list view that tracks whether users have verified their email addresses and phone numbers.
   a. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
   b. Click **Create New View** and select these verification-specific fields.
      - Admin Trusted Mobile Number
      - One-Time Password App
      - Salesforce Authenticator
      - Temporary Code
      - U2F Security Key
      - User Verified Email
      - User Verified Mobile Number

Customize the Community Self-Registration Process with Apex

You can change how external users register for your community by modifying the default self-registration controller or by replacing it with your own custom self-registration controller. However, it's easier to modify the generated Configurable Self-Reg handler created when you choose Configurable Self-Reg Page from the Community Workspaces Administration Login & Registration page.

These steps describe how to create a custom self-configuration page in Apex. For example, you can create a self-configuration page to assign different profiles or permission sets for different communities. The self-registration process entails:

- Generating a registration form that guests use to register with your community.
- Confirming that a password reset email is sent. The email is sent to users when the community requires users to log in with their passwords.

To generate the registration form, modify `CommunitiesSelfRegController` and the associated `CommunitiesSelfReg` Visualforce page. You use this single Apex controller regardless of which registration page type you choose. You also use this controller to implement multiple communities. Then you direct users to the appropriate start URL for each community.

To confirm that a password reset email is sent, modify `CommunitiesSelfRegConfirmController` and the associated `CommunitiesSelfRegConfirm` Visualforce page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

Note: The customizations you make in `CommunitiesSelfRegController` override the Login & Registration page settings. In orgs created before the Spring '15 release, existing Apex customizations for self-registration remain in effect.

Note: You can add, edit, or delete Apex using the Salesforce user interface only in a Developer Edition organization, a Salesforce Enterprise Edition trial organization, or sandbox organization. In a Salesforce production organization, you can only make changes to Apex by using the Metadata API `deploy` call, the Force.com IDE, or the Ant Migration Tool. The Force.com IDE and Ant Migration Tool are free resources provided by Salesforce to support its users and partners, but are not considered part of our Services for purposes of the Salesforce Master Subscription Agreement.

1. From Setup, enter *Apex Classes* in the Quick Find box, then select **Apex Classes**.
2. Click **Edit** next to `CommunitiesSelfRegController`.
3. Optionally, enter a value for `ProfileId` to define which type of profile to assign to the user.
4. Enter the account ID for the partner or customer account that users who self-register are associated with.

This account ID value overrides the default account set on the Login & Registration page.

Ensure that the account you use is enabled as a partner. Go to the account, click **Manage External Account**, then click **Enable as Partner**.

5. If you're enabling self-registration for multiple communities, add code to assign the correct profile, role, and account ID to each community.
6. Click **Save**.
7. Enable access to accounts and contacts for the guest profile. The guest profile is automatically associated with your community's Lightning Platform site.
   a. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**, and click **Workspaces** next to a community.
   b. Select **Administration**, select **Pages**, and then click **Go to Force.com**.
   c. Click **Public Access Settings**.
   d. Under Standard Object Permissions, select **Read** and **Create** next to Accounts and Contacts and click **Save**.
   e. Under Enabled Apex Class Access, click **Edit**.
   f. Add `CommunitiesSelfRegController` to **Enabled Apex Classes**, and click **Save**.
   g. Under Enabled Visualforce Page Access, click **Edit**.
   h. Add `CommunitiesSelfReg` to **Enabled Visualforce Pages**, and click **Save**.
8. Optionally, to customize the contents of the default self-registration page, edit the `CommunitiesSelfReg` page.

   Note: Don't rename or delete the default self-registration page. It can cause problems with the self-registration flow.

   a. From Setup, enter *Visualforce Pages* in the Quick Find box, then select **Visualforce Pages**.
   b. Click **Edit** next to `CommunitiesSelfReg`.
   c. Add code to customize the fields required for self-registration or the page's look and feel.
      In the default form, all fields except Password are required.
   d. Click **Save**.

When setup is complete, external users who submit the completed self-registration form are logged in to the community.

Note: If a user self-registers for a community with Chatter Answers enabled, the Chatter Answers User permission is not set for the user.

If you're using a custom Visualforce self-registration page instead of the default, update `CommunitiesSelfRegController`. Then replace `CommunitiesCustomSelfRegPage` with the name of your custom self-registration page.

Customize Code for Lightning Components on Login Pages

To add custom logic to the Login pages in Lightning communities, customize the Lightning component for those pages.

Each community comes with a default set of Login pages: Check Password, Forgot Password, Login, Login Error, Register. Each has a standard Lightning component that drives this functionality. You can add code logic to customize the login experience per your company and community's requirements.

1. From Setup, enter *Lightning Components* in the Quick Find box, then select **Lightning Components** under Develop.
2. From the list of components, click on the one you want to customize.

   For example, to customize the login experience, click loginForm.
3. On the Lightning component detail page, click **Developer Console**.
4. Follow the instructions in the code to expose the component in Community Builder.
5. Add custom code logic and save your changes as a new custom component.
6. Go back to Community Builder in your community and bring up the Login page from the list of pages. The custom component you created should display in the list of components.

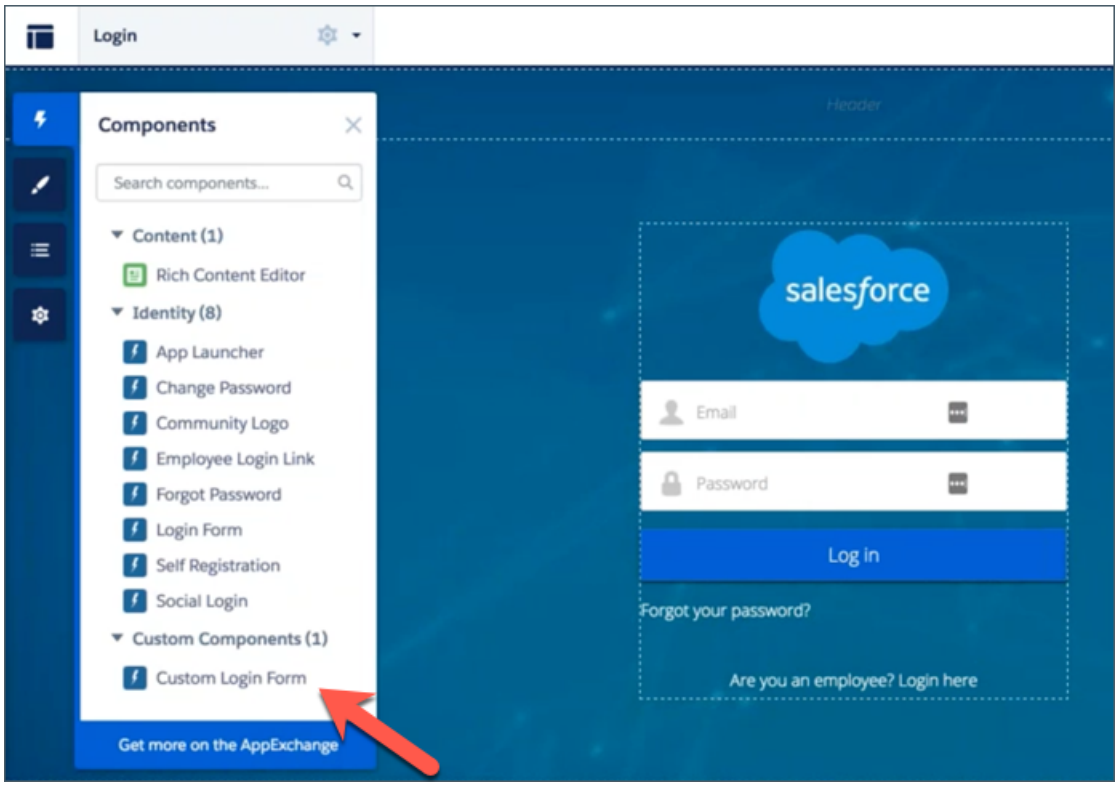
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and edit Lightning components:
- Customize Application



Enable Other Salesforce Features in Communities

Salesforce Communities offers a platform to expose a ton of Salesforce features and functionality to community members. For example, enable Salesforce Knowledge so customers can view knowledge articles in your community. Enable case feeds to facilitate discussions over customer cases. Or, let partners view Analytics dashboards in your community. There's also Chatter Questions, direct messages, Question-to-Case, and field service data. It's all fair game!

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Cases for Communities Users

Enable cases for external users so that they have access to and can create cases in your communities.

When you enable cases for external users in your community, you can assign cases to those members. Additionally, external members can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams.

Note: Case comments added by external users in communities are public and can be viewed by any user that can view the case. Also, external users can't edit case comments, associate assets with cases, delete cases, or update the case status.

1. Add the Cases tab to the list of available tabs in your community.
2. Set tab visibility and "Read," "Create," and "Edit" object permissions. You can either set them on the profile or using a permission set. We recommend using a permission set if you plan to apply these permissions selectively.
   a. If using a profile, such as the Partner Community profile, set the cases tab setting to `Default On` and enable the "Read," "Create," and "Edit" object permissions for cases.
   b. If using a permission set, create a permission set with the following settings for cases:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select "Read," "Create," and "Edit".

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable cases for Communities users:
- Manage Profiles and Permission Sets

If case comment notification to contacts is enabled, emails sent to external users include a link to the community. Emails sent to contacts for case creation and update notifications also include a link to the community.

SEE ALSO:

Restrict Community User Access to Cases

Merge Fields for Communities

Enable Portal Reply Email Notifications in Case Feed

Restrict Community User Access to Cases

Determine whether users with Customer Community Plus licenses can view and edit cases in which they are listed as the contact. You can disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

For example, Acme has offices around the world, and it wants to keep its cases private within each office location. By disabling the standard sharing behavior, community users who transfer from one of Acme's locations to another can no longer bring their assigned cases with them.

1. From Setup, enter *Sharing Settings* in the Quick Find box, and then select **Sharing Settings**.
2. In the Other Settings section, deselect **Grant community users access to related cases**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community Case Feed

With the community case feed, agents and community members see the life cycle of a case from start to finish. All case interactions appear in a unified, chronological Chatter case feed. Community members benefit from the added functionalities of Chatter, while support-side features help agents provide efficient, personalized support.

The community case feed gives community users an intuitive environment where they can manage their cases. Internal and external users see the following interactions in the community case feed:

- Chatter text, file, and link posts
- Questions in Chatter that are associated with the case
- Case emails

  Note: To learn more about case email visibility, see Emails in the Community Case Feed.

- Read-only social posts on cases if your Salesforce administrator enables them

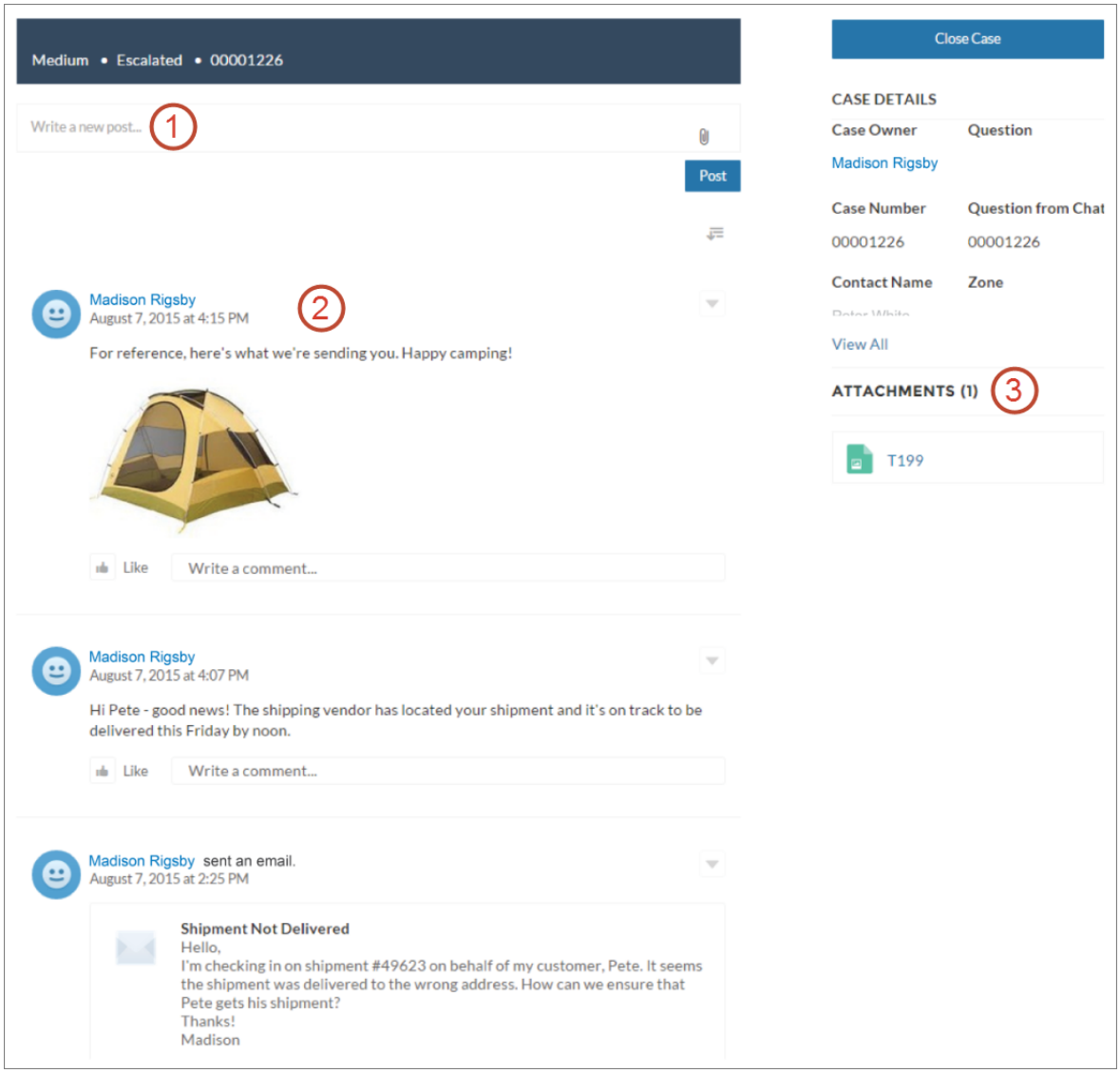
x

Community case feed in a community built on the Customer Service template:

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Using the publisher **(1)**, users create posts and attach files to the case. The feed **(2)** comes fully equipped with Chatter's collaboration tools: users can bookmark, like, and comment on posts, and mention other users. Images and comments appear inline, making it easy to scan the feed for details. The Attachments component **(3)** displays all case attachments.

When the community case feed is enabled, support agents can:

- Use the Community action in the console case feed to answer community questions and create private and public Chatter posts on cases
- Expose or hide a published post or email in the community case feed of external users

The community case feed is available in all communities that use the self-service community templates or Salesforce Tabs + Visualforce.

Known Issues

- In communities built on templates, emails in the community case feed don't display inline images or clickable links.

- In communities built on the Koa or Kokua community templates, users' names in the community case feed look like links but don't lead anywhere.

SEE ALSO:

Community Case Feed Considerations

Set Up the Community Case Feed

Expose or Hide a Published Post or Email in the Community Case Feed

Post on Cases and Community Questions with the Community Action in the Case Feed

Set Up the Community Case Feed

The community case feed lets community users and support agents see all case interactions in a unified feed. Also, agents can take more actions directly from the console. To set up the community case feed, enable it in your organization and make sure that the case page in your community is properly configured.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

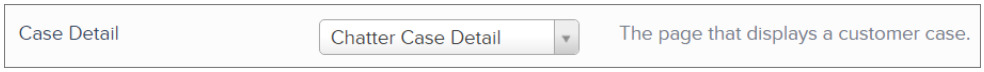
USER PERMISSIONS

To enable the community case feed:

- Customize Application
- Compact case feed enabled in your organization

Important: Before setting up the community case feed, read Community Case Feed Considerations.

1. Enable the community case feed:
   a. From Setup, enter `Support Settings` in the Quick Find box, then select **Support Settings**.
   b. Select **Enable Community Case Feed**.
   c. Optionally, select **Enable Email Notifications for Case Posts** (recommended).
   d. Click **Save**.
2. If your community was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
3. If your community uses the Customer Service template, confirm that your active case detail page supports the community case feed:
   a. In Community Builder, click .
   b. Click **Page Management**.
   c. Find Case Detail in the Name column, and make sure the active page assigned to it is either Chatter Case Detail (the default) or Record Detail.



If you change the active case detail page, publish your change.

Important: If the community case feed is enabled and you use Basic Case Detail as your active case detail page, external users see only case comments—not Chatter posts or emails—in their case feed. This gives external users far less visibility into their cases. To give users a full view of their case interactions, use Chatter Case Detail or Record Detail as your active case detail page.

Community Case Feed Considerations

Before setting up the community case feed, review this essential information.

If the community case feed is enabled:

- Agents can use the Community action in the console case feed to answer community questions and create private and public Chatter posts on cases.
- Agents can expose or hide published Chatter posts and emails in the case feed of external community users.
- External community users with access to a case see associated Chatter posts, questions, and emails in their case feed.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If email notifications for case posts are enabled:

- When someone makes an externally visible post on a case, all case contacts that are also Community members are notified by email. They can comment on the post by replying to the email.
- If you're already using custom email notification settings, such as those triggered by workflows, selecting this preference can create duplicate email notifications.
- In communities built on the Customer Service template or Salesforce Tabs + Visualforce, you can turn off these notifications. In your email notification settings, deselect **Posts on one of my cases** under "Email me when someone...".

SEE ALSO:

Emails in the Community Case Feed

Expose or Hide a Published Post or Email in the Community Case Feed

Set Up the Community Case Feed

Emails in the Community Case Feed

When you enable the community case feed, external users with access to a case see case emails in their feed. Emails in the community case feed include the email's author, recipients, text, and time sent.

By default, if the case contact sends or receives a case email, that email appears in the feed of all users—both internal and external—with access to the case. For an external user to view the case, their profile must include access to cases in the community.

For example, suppose Rita, an external user, posts a question in a community. The question remains unresolved, and a community moderator creates a case from it using the Question-to-Case action. If the support agent assigned to the case emails Rita from the email publisher, Rita and all other users with access to the case see the email in their case feed. Users with access to a case typically include the assigned support agent and the case contact.

If the community case feed is enabled, you can write an Apex trigger or process to hide or expose all case emails in the feeds of external community users. The `IsExternallyVisible` field of the EmailMessage object controls the visibility of email messages in the community case feed. When the field is set to `true` emails sent or received by the case contact are visible to external users with access to the case.

Example: The following trigger exposes all case emails in the feeds of external users with access to the case. This means that case emails between internal users will also be visible to external users with access to the case (for example, if the assigned support agent used the email publisher to email their shipping vendor). To *hide* all case emails from external users' case feeds, simply change `true` to `false`:

```
trigger makepublic on EmailMessage (before Insert) {
for(EmailMessage oe:trigger.new){
oe.IsExternallyVisible=true;
```

```
}

}
```

SEE ALSO:

Expose or Hide a Published Post or Email in the Community Case Feed

Expose or Hide a Published Post or Email in the Community Case Feed

When necessary, support agents can expose or hide individual case emails and published Chatter posts in the case feed of community users.

To change the external visibility of a published Chatter post or email on a case:

1. Navigate to the post or email in the compact case feed.
2. In the post or email's drop-down menu:
   - Select **Make Public** to expose an internal Chatter post or email in the case feed of external users with access to the case
   - Select **Make Private** to remove a Chatter post or email from the case feed of external users with access to the case

EDITIONS

Available in: Salesforce Classic

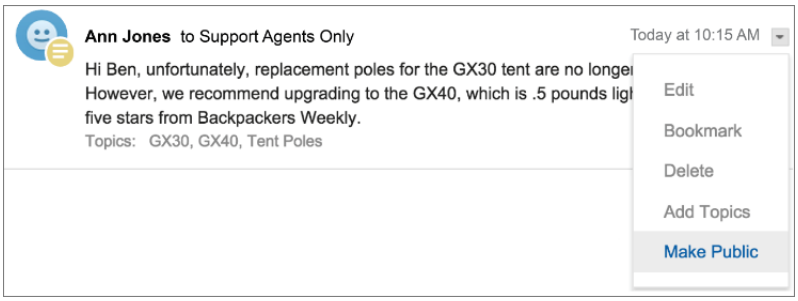
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit the external visibility of a published Chatter post or email on a case:

- Edit My Own Posts
- Edit Posts on Records I Own
- Compact case feed enabled in your organization
- Community case feed enabled in your organization

Make Public option on a case Chatter post:



Make Public option on a case email:

The agent who owns the case and their superiors see the **Make Public** and **Make Private** options on all case emails and Chatter posts on the case. Internal users who don't own the case also see these options on case posts or emails that they authored.

Making Emails and Chatter Posts *Private*

Clicking **Make Private** on a case Chatter post or email means that the case contact and any other external users with access to the case no longer see the post or email in their case feed. (It still appears in the feeds of internal users with access to the case.) An agent might choose to make an email or post in the community case feed private if they want to hide their correspondence with the case contact from the case feed of other external users with access to the case.

Note: Keep in mind that when you make an email private, the email recipient(s) already received the email. Similarly, when you make a Chatter post private, remember that external users with access to the case may have been notified by email when it was first posted.

Making Emails and Chatter Posts *Public*

Clicking **Make Public** on a case Chatter post or email means that the case contact and any other external users with access to the case now see the post or email in their case feed. An agent might choose to make an email or post in the community case feed public in order to keep the case contact updated about internal progress on the case.

Note:

- The case feed offers handy visual cues to help agents quickly identify which case posts are externally visible. To learn about enabling these visual cues, see "Feed View Options" in Settings for Feed Views in Case Feed.
- You can write an Apex trigger or process to hide or expose all case emails from the community case feed of external users. For more information, see Emails in the Community Case Feed.

SEE ALSO:

Community Case Feed

Enable Chatter Questions in Your Community

Chatter Questions helps you promote community engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and communities can answer questions in Chatter just as they would comment on a Chatter post. Users in communities built on the Customer Service template can also attach files to questions.

To set up Chatter Questions in your community, simply add the Question action to the global publisher layout. In organizations created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.

Note: Chatter Questions is not available in communities built on the Koa and Kokua community templates.

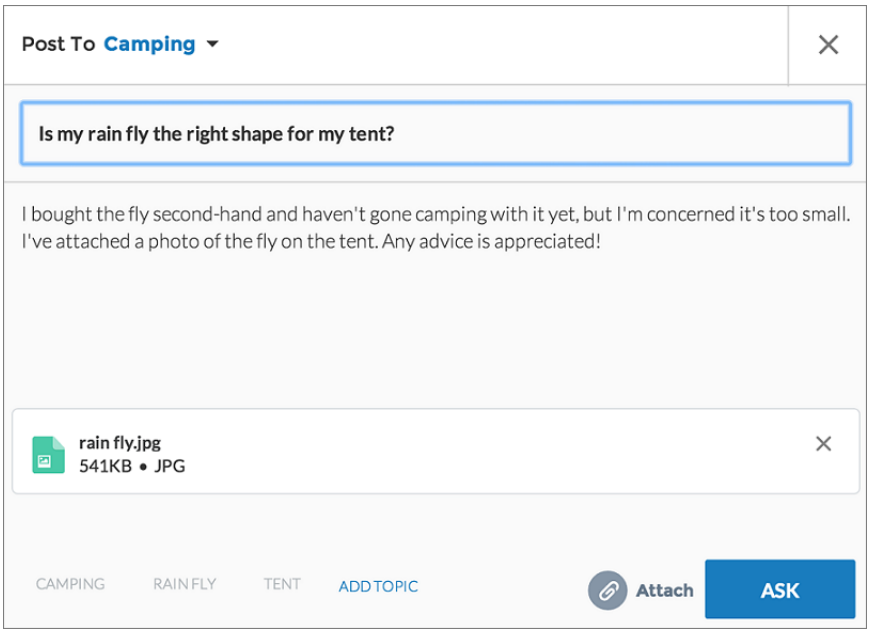
EDITIONS

Available in: Salesforce Classic

Chatter Questions is available in: **Group**, **Professional**, **Developer**, **Performance**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To edit the global publisher layout:
- Customize Application



1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. Click **Edit** next to the global publisher layout.
3. Drag the Question action from the palette to the global publisher layout. If the Question action already appears in the layout, drag it to the location where you want it.
4. Click **Save**.

Note: If you're using a customized publisher layout in groups or on records, make sure that the Question action is added to those layouts as well.

SEE ALSO:

Track Chatter Questions Use in Your Salesforce Organization and Communities

Enable Chatter Answers in Your Community

Chatter Answers is a self-service support community where users can post questions and receive answers and comments from other users or support agents.

Note: Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see End of Support for Chatter Answers in Spring '18. Starting with Summer '13, Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Answers if it was enabled before the Summer '13 release.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Chatter Answers in Salesforce Communities:
- Customize Application

To set up Chatter Answers in Salesforce Communities, follow these high-level steps:

1. Enable Chatter Answers.
   a. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
   b. Select **Enable Chatter Answers**.
2. Ensure that your community members have access to the following objects within your organization:
   - Questions
   - Knowledge Articles
   - Data Categories
3. Create a zone for Chatter Answers.
   a. Enable the zone for Chatter Answers.
   b. Set the Visible In setting to the community that you want the zone shown in.
   c. As a best practice, select a public group from your organization to designate as a Customer Support Agents Group.
4. Add the Q&A tab to your community.
   a. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities** and click **Community Workspaces** or **Manage** next to a community.
   b. Click **Administration** > **Tabs**.
   c. Add the Q&A tab to the Selected Tabs list.
   d. Click **Save**.
   e. Click **Close**.
5. Make the Q&A tab visible on profiles that need access to it.
   a. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
   b. Click **Edit** for the profile that you want to make the Q&A tab visible for.
   c. Under Standard Tab Settings, set the Q&A tab to Default On.
   d. Click **Save**.

After you have enabled Chatter Answers in your community, consider the following extra deployment options:

- A public-facing Salesforce Site with or without a portal.
- A Visualforce tab, which provides branding, a customized landing page, and custom access to Chatter Answers within your community.

If a user self-registers for a community with Chatter Answers enabled, the Chatter Answers User permission is not automatically set for the user. Set permissions for Chatter Answers on the community user.

Add a Translate Button to Feed Items in Communities

The translation setting in Community Builder puts a Translate with Google menu on every feed item. Translations are offered through a Google Cloud Translation API key that you provide.

Before you configure translation, go to https://cloud.google.com/translate, and get your translation key.

Note: Google Cloud Translation is a subscription service. For pricing information, see https://cloud.google.com/translate/pricing.

Take these steps to add a Google Cloud Translation API key to your community.

1. In Community Builder, go to **Settings** > **Languages** and enter your Google Cloud Translation API key.
2. Click **Validate & Save Key**.

   This action checks the validity of your key, and, if valid, saves your setting.

After you verify and save your key, a **Translate with Google** menu appears on all feed items in your community. Feed items include posts, questions, polls, and their comments, answers, and replies.

- To translate the feed item into the default language, click **Translate with Google**.

  For community members, the default language comes from the locale that's set on the user's profile. For guest users, it comes from the locale set in the user's browser.
- To select a language, click the menu icon and select from the list.

These languages appear on the translation list.

Albanian	Arabic	Armenian	Basque	Bengali
Bosnian	Bulgarian	Catalan	Chinese Simplified	Chinese Traditional
Croatian	Czech	Danish	Dutch	English
Estonian	Finnish	French	Georgian	German
Greek	Hebrew	Hindi	Hungarian	Icelandic
Indonesian	Irish	Italian	Japanese	Korean
Latvian	Lithuanian	Luxembourgish	Macedonian	Malay
Maltese	Montenegrin	Norwegian	Polish	Portuguese
Romanian	Romansh	Russian	Serbian	Slovak
Slovenian	Spanish	Swedish	Tagalog	Tamil
Thai	Turkish	Ukrainian	Urdu	Vietnamese
Welsh	—	—	—	—

EDITIONS

Available in: Lightning communities accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To configure feed translations in a community

- Is a System Administrator OR has the permission
- Manage Communities OR Create and Set Up Communities
- AND is a member of the community

After translation, **Translate with Google** switches to **View Original**, so it's easy to switch back to the original language.

SEE ALSO:

Multilingual Communities Overview

Enable Upvoting and Downvoting

Use community preferences to enable upvoting and downvoting in lieu of liking on questions and answers in your community. When you enable upvoting and downvoting, members see an **Upvote** option under a question or answer and a **Downvote** option on the question or answer's overflow menu. The **Like** option goes away. Upvoting and downvoting are disabled by default in communities created in Spring '19 and later.

For communities created before the Winter '18 release, it's an easy task to enable up and down voting in your community.

EDITIONS

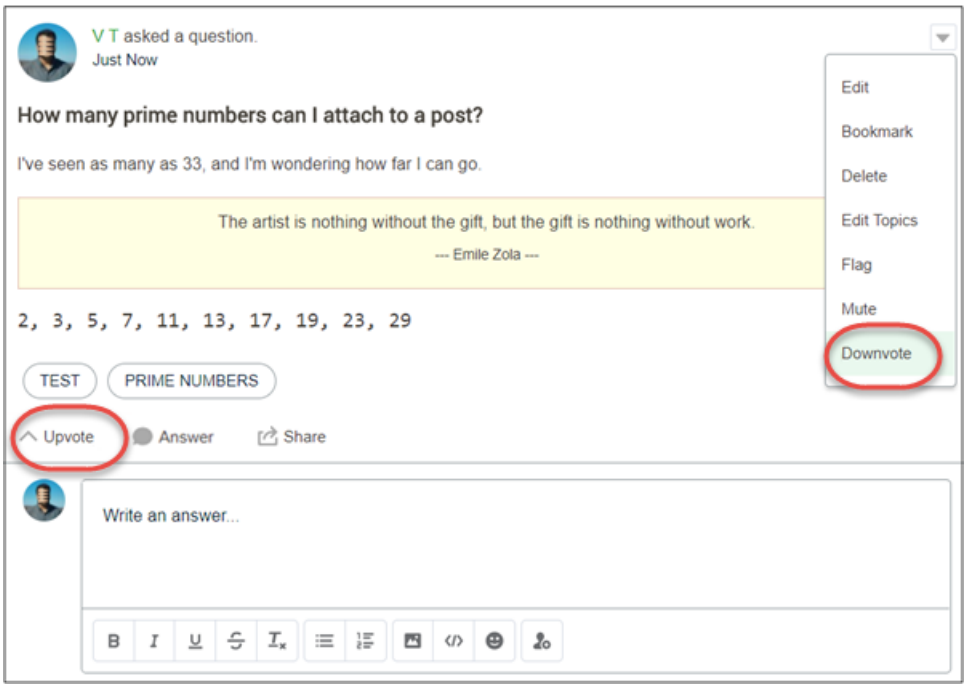
Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable up and down voting in a community:

- Create and Set Up Communities

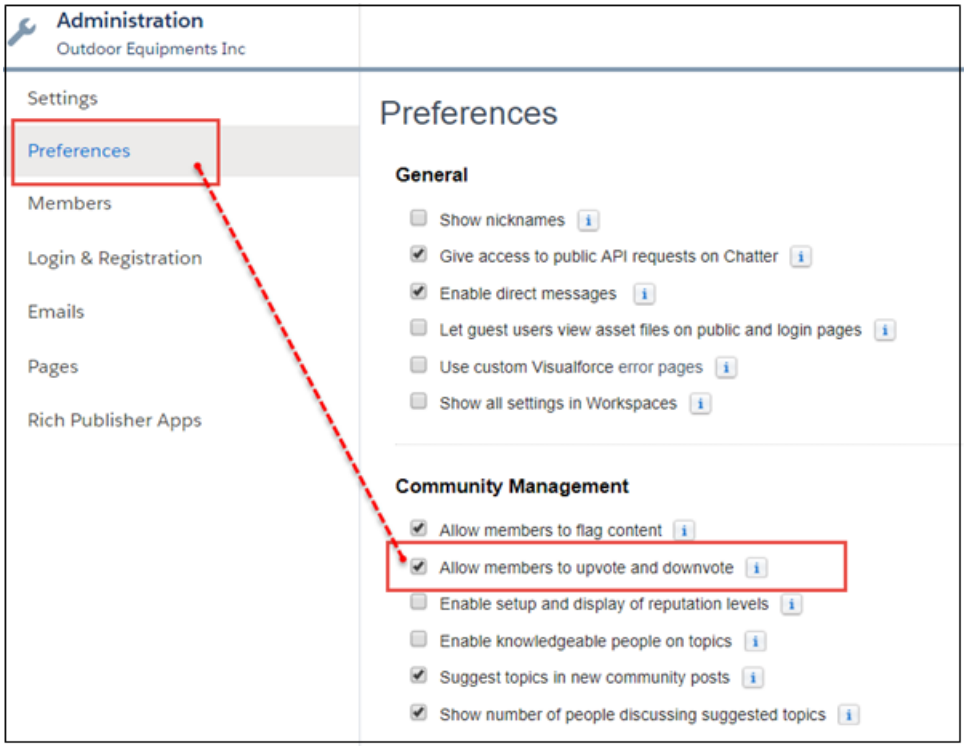


When you change to upvotes, pre-existing likes are included in the upvote count. Click the count to see a list of the people who have upvoted.

Note: No one is listed more than once, even if a person both liked and upvoted a question or answer. But each like and upvote is counted. For example, if someone both liked and upvoted a question, the count is 2, although their name is listed only once. If you prefer not to merge like and upvote counts, contact Salesforce support.

Note: On influence cards, upvotes count as likes received. Your own upvotes on your own posts or comments aren't counted towards influence. Downvoting a post or comment doesn't reduce the like count, unless a user is changing their own upvote to a downvote.

1. In your community, go to Community Workspaces and click the Administration workspace.
2. Open the Preferences page, and, under Community Management, select **Allow members to upvote and downvote**.



3. Click **Save**.

Assign Permission to Verify Answers for Your Company

Sometimes there's more than one correct answer to a question. Among the correct answers, your company can prefer one course for people to follow. You can highlight an answer your company endorses by marking it as Company Verified. Questions marked as Company Verified or as Best Answer are copied to the top of the thread under a Top Rated Answers section. As the community admin, you can give permission to the members best qualified to speak for the company. You can grant **Verify Answers to Chatter Questions** through user profiles or permission sets.

Assign the **Verify Answers to Chatter Questions** permission in Setup. You can assign the permission by adding it to a permission set or a user profile.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission to company-verify answers in a community:

- Create and Set Up Communities

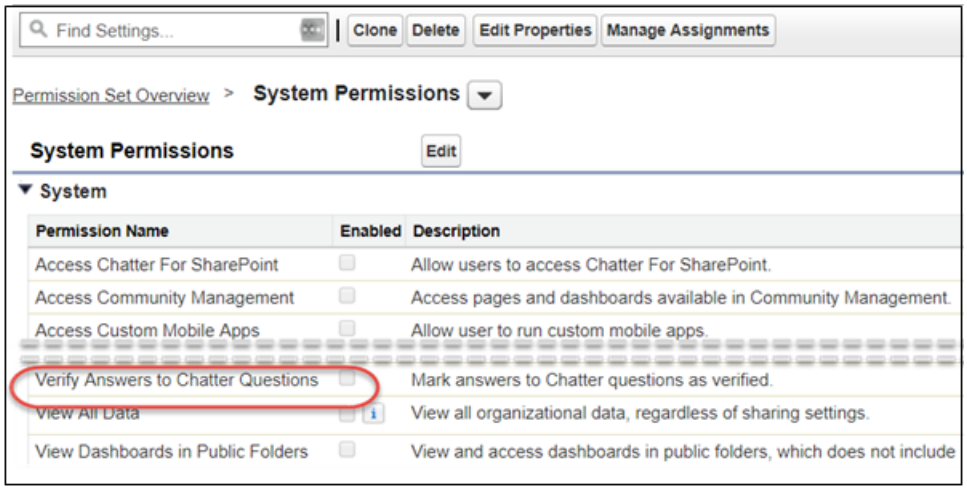
Assign Permission to Verify Answers Through a Permission Set

These steps guide you through assigning the **Verify Answers to Chatter Questions** permission through a permission set.

Assign the **Verify Answers to Chatter Questions** permission in Setup.

1. In Setup, enter `Permission Sets` in the `Quick Find` box, then click **Permission Sets** in your results.

2. Open the permission set you plan to use.
3. Open **System Permissions**, click **Edit**, and select **Verify Answers to Chatter Questions**.



4. Click **Save**.
5. If necessary, assign the permission set. You can assign permission sets to a single user from the user detail page. You can assign multiple users to a permission set from any permission set page.
   The **Company Verify** option appears on the answer overflow menu only to users with the **Verify Answers to Chatter Questions** permission.

SEE ALSO:

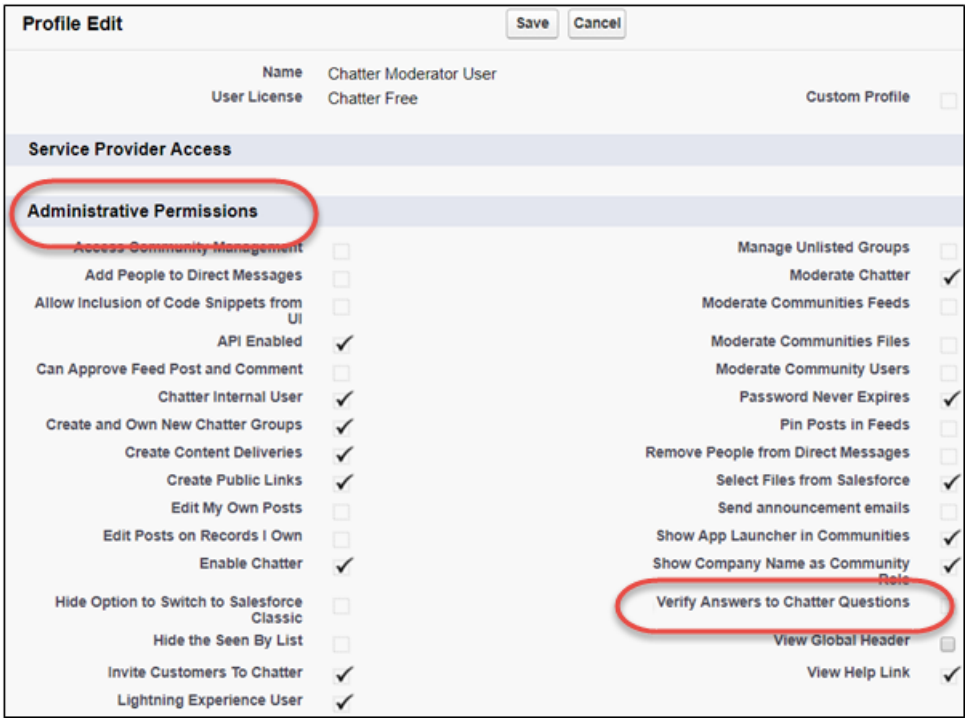
Manage Permission Set Assignments

Assign Permission to Verify Answers Through a User Profile

These steps guide you through assigning the **Verify Answers to Chatter Questions** permission through a user profile.

Assign the **Verify Answers to Chatter Questions** permission in Setup.

1. In Setup, enter *Profiles* in the Quick Find box, then click **Profiles** in your results.
2. Click **Edit** next to the profile you plan to use.
3. Under **Administrative Permissions**, select **Verify Answers to Chatter Questions**.



4. Click **Save**.
   All users with this profile are now able to verify answers on behalf of your company in the community feeds that they have access to.

   Note: The **Company Verify** option appears on the answer overflow menu only to users with the **Verify Answers to Chatter Questions** permission.

Assign Post Pinning Permission

Let post pinning get your most critical information the best exposure. In community group and topics feeds, when someone posts critical information, an authorized user can pin that post to the top of the feed. The post stays in place until an authorized user unpins it. Authorized users can pin up to three posts to the top of a feed. After you enable post pinning through your org's Chatter settings, you can assign the **Pin Posts in Feeds** permission through a permission set or a user profile.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

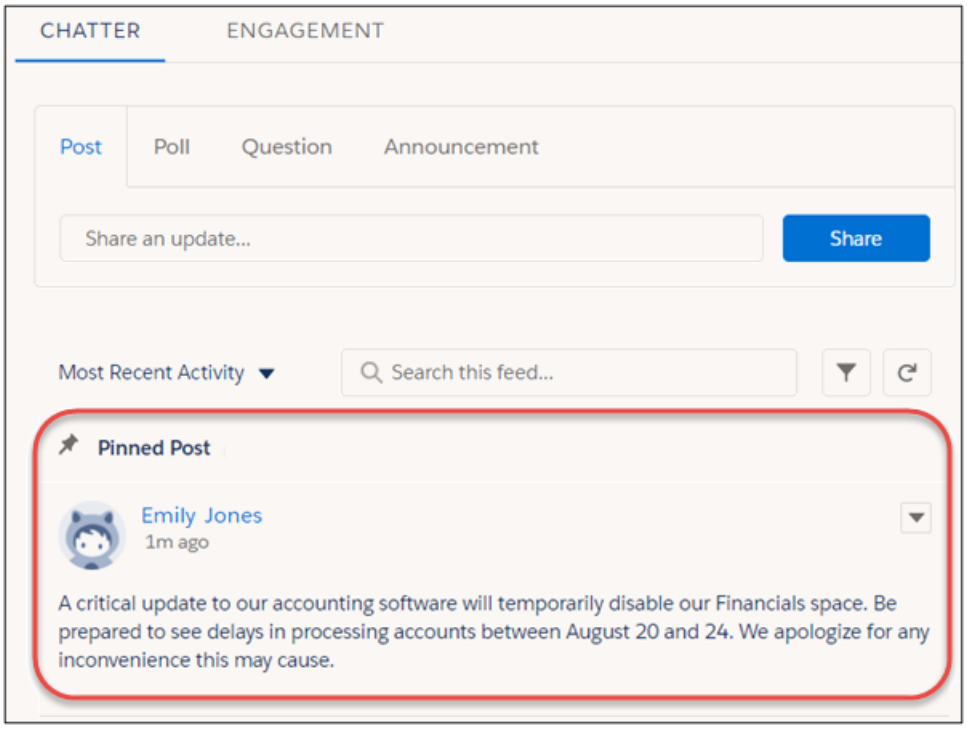
USER PERMISSIONS

To assign post pinning permission to a user in a community:

- Enable Chatter

  AND

  Create and Set Up Communities



When all permissions are in place, the **Pin** option appears on a feed item's overflow menu in community group and topics feeds. The **Pin** option doesn't appear on a feed item's overflow menu in the item's detail view.

Start by enabling post pinning for your org. Go to **Setup > Chatter Settings**, and select **Allow post pinning**. After post pinning is enabled, admins, community managers, and group owners and managers can pin posts. Admins can also assign the Pin Posts in Feeds permission to selected users. Assign post pinning permission in Setup through user profiles and permission sets.

When you pin a post, it appears twice in the feed: where it was posted and in its pinned position at the top of the feed. You can pin only the posts that were added directly to the feed. You can't pin posts that were added through an @mention.

Pinned posts are similar to announcements with these differences.

- Announcements are available only to group feeds. Post pinning is available to group and topics feeds.
- Announcements follow a linear timeline: you post it and you let it expire. Pinned posts are more flexible: you can pin posts from the past or the present.
- An announcement expires on a set date. A pinned post stays pinned until an authorized user unpins it.
- As the admin, you can choose who is authorized to pin posts. Only group owners and managers and users with the "Modify All Data" permission can post and delete group announcements.
- Authorized users can pin up to three posts to the top of a feed. You can post one announcement per group feed.
- You can add style to a pinned post with the rich text editor.

Assign Permission to Pin Posts Through a Permission Set

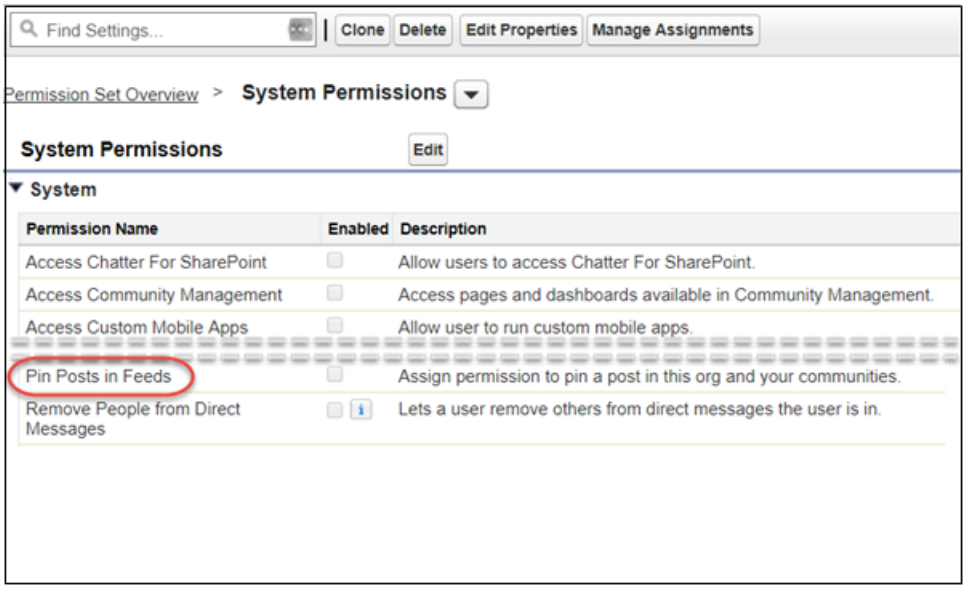
These steps guide you through assigning the Pin Posts in Feeds permission through a permission set.

Before you assign the Pin Posts in Feeds permission, enable post pinning for your org. Go to **Setup > Chatter Settings**, and select **Allow post pinning**.

Assign the Pin Posts in Feeds permission in Setup.

1. In Setup, enter *Permission Sets* in the Quick Find box, then click **Permission Sets** in your results.

2. Open the permission set you plan to use.
3. Open **System Permissions**, click **Edit**, and select **Pin Posts in Feeds**.



4. Click **Save**.
   If necessary, assign the permission set. You can assign permission sets to a single user from the user detail page. You can assign multiple users to a permission set from any permission set page.

   Note: The **Pin Post** option appears on the post overflow menu only to users with permission. The option appears on the post overflow menu only in the feed and not in the post's detail view.

SEE ALSO:

Manage Permission Set Assignments

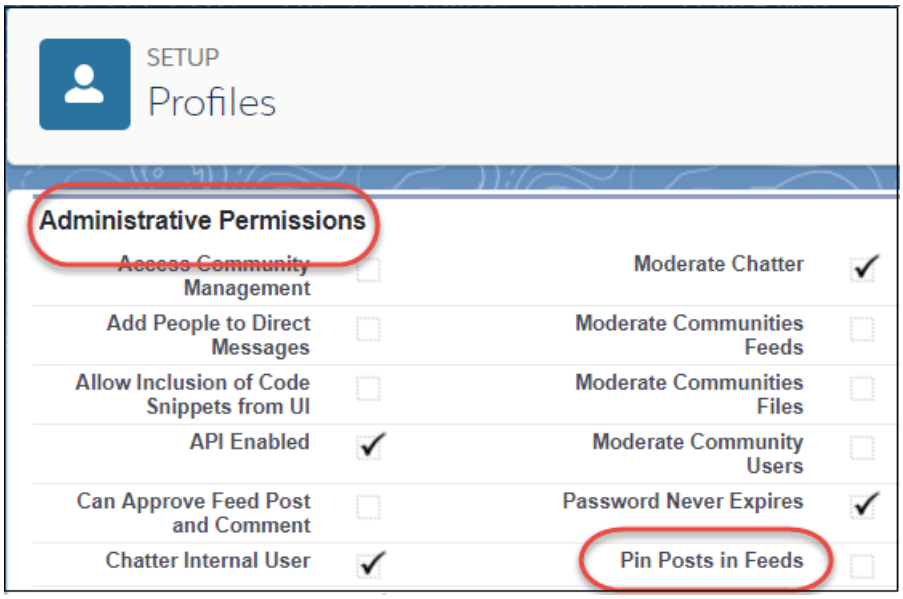
Assign Permission to Pin Posts Through a User Profile

These steps guide you through assigning the Pin Posts in Feeds permission through a user profile.

Before you assign the Pin Posts in Feeds permission, enable post pinning for your org. Go to **Setup > Chatter Settings**, and select **Allow post pinning**.

Assign the Pin Posts in Feeds permission in Setup.

1. In Setup, enter *Profiles* in the Quick Find box, then click **Profiles** in your results.
2. Click **Edit** next to the profile you plan to use.
3. Under **Administrative Permissions**, select **Pin Posts in Feeds**.



4. Click **Save**.
   Everyone assigned the edited profile can pin up to three posts to the top of the group and topics feeds that they have access to.

   Note: The **Pin Post** option appears on the post overflow menu only to users with permission. The option appears on the post overflow menu only in the feed and not in the post's detail view.

Move Feed Items from One Public Group Feed to Another

In communities, the **Move** option on feed item overflow menus offers a way to relocate feed items from one public group feed to another. Use Move to improve an item's visibility or to place it in a more relevant context. For example, if a user posts a Sales poll in a Marketing feed by mistake, the poll can easily be moved to the right location. System Administrators, Community Managers, and Chatter Moderators can move posts, polls, and questions.

Note: You can't move feed items into or out of public, broadcast-only groups.

When you move an item:

- Mentions are preserved.
- Announcements become announcements in the target group.
- Things that are included in or attached to the feed item stay included or attached.

  For example, moved items bring their answers, comments, replies, topics, bookmarks, attachments, and other related entities with them. If an answer is marked as best, that status is preserved.

Note: To move a post that's pinned, unpin it first.

1. Open the overflow menu on the feed item to be moved, and select **Move**.
2. In the Move Feed Item to Another Public Group dialog, search for the group to move the item to.
3. In the search results, select the target group, and then click **Move**.

EDITIONS

Available in: Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To move feed items from one public group feed to another

- Is a System Administrator OR has the permission
- Moderate Communities Feeds
- AND is a member of the community

The item, along with all of its related entities, is removed from the first public group and placed in the second.

Users receive notifications about the moved feed item according to their preferences. So, assuming people have opted in to the related notification setting:

- People who follow the target group are notified.
- When the person who moved the feed item is also a follower of the target group, they are notified.
- People who are mentioned in the moved feed item are notified about the mention.
- The moved item's author is not notified. The author isn't notified because, no matter their notification settings, a feed item's author isn't notified about their post actions.

SEE ALSO:

Community Moderation Strategies and Tools

Assign a Default Community to a User Profile

Assign a default community to a user profile to associate that profile with a specific community. Any links in the notification lead back to the default community—no more news from nowhere.

Assign a **Default Community** value in Setup through Profiles.

1. In Setup, enter *Profiles* in the Quick Find box, then click **Profiles** in your results.
2. Click the name of the profile you want to change.
3. In the Default Community section, click **Edit**.
4. Select a community from the **Community** list.
5. Click **Save**.
   All community members who are assigned the user role are associated with the selected default community. When they receive email notifications about network-agnostic objects, like accounts, cases, and opportunities, links in the notification emails lead back to the default community. When they receive their new-user email or notifications about password resets, links in those messages also lead back to their default community.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign a default community to a user profile:

- Chatter Enabled

  AND

  Create and Set Up Communities

Add Rich Publisher Apps to Your Feeds

Customize the Chatter publisher with payloads that are unique to your business process. Add a form to a post; choose from a selection of branding images; add inspiration to your feed with profound quotations. Select from the custom apps your team creates or acquires from AppExchange. Add up to five apps to the Chatter publisher.

Add Rich Publisher Apps to the Chatter publisher through the Administration workspace in your community.

1. In the Profile menu, click **Community Workspaces**.
2. Click the **Administration** workspace.
3. On the Administration page, click **Rich Publisher Apps**.
4. Move apps between the Available Apps and Selected Apps lists.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To add Rich Publisher Apps to the Chatter publisher in your community:

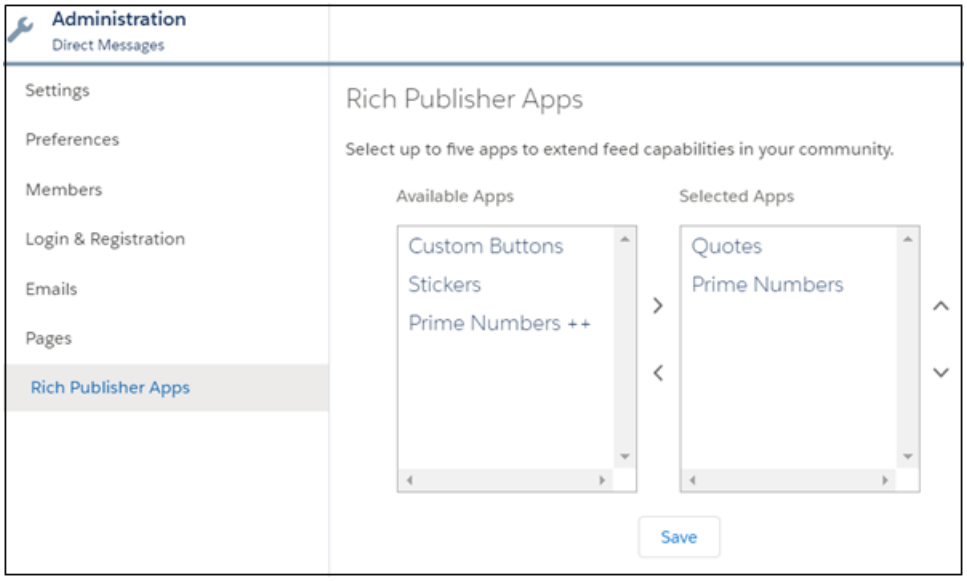
- Chatter Enabled

  AND

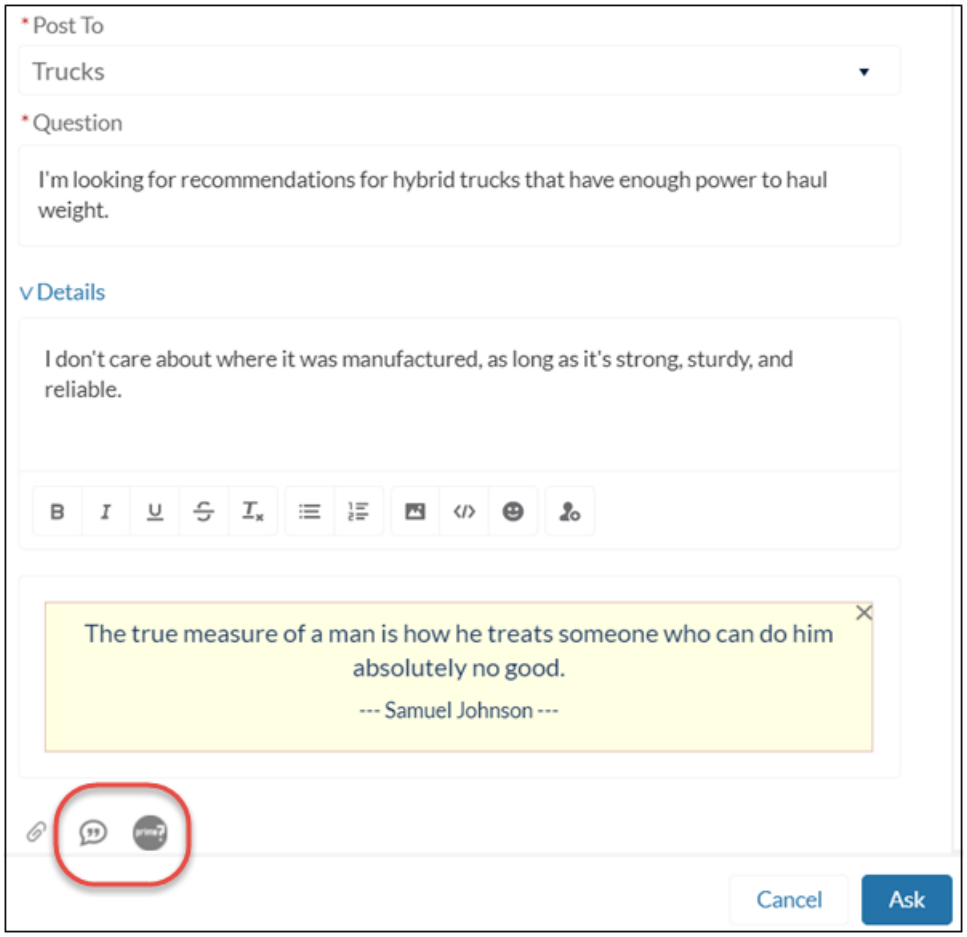
  Create and Set Up Communities

  AND

  Enable Rich Publisher Apps for community feeds



5. Rearrange the Selected Apps list in the order you want the apps' icons to appear in the Chatter publisher.



Selected apps appear to the right of the Attach icon in the Chatter publisher. The apps appear in the order you arranged them in the Selected Apps column.

Enable Direct Messages in Your Community

Allow community members to send direct messages to start a private conversation with one or more members. Direct messages are supported in all Lightning communities and in Lightning Bolt Solutions, such as the Lightning Partner Management solution.

Note: Review the the limitations that apply before you enable direct messages for your community.

Direct messages offer privacy for more sensitive conversations. Imagine a scenario where a customer brings up an issue they have with a product in the community feed. A support agent can share that post and address the customer's concerns privately in a direct message. Similarly, a channel manager can discuss sensitive sales data with one or more partner users in a partner community.

Note: Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication in communities. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

1. Make sure that Chatter is enabled in your org.
2. Open Community Workspaces or Community Management.
3. Under Administration, click **Preferences**.
4. Select **Enable direct messages** and save your changes.
5. In Community Builder, click the **Profile Header** component on the community Home page and select **Include My Messages**. The My Messages link appears in the user profile dropdown menu.
6. Optionally, add other components to your community pages to facilitate easy access to direct messages.
   - Add the **Messages** page to your community's navigation menu for prominent placement and easy access.
   - Add the **New Message Button** component to any page you want to allow community members to create messages from.
   - Add the **Message Notification** component to the community home page.
7. Publish your community.

After enablement, community members can start a direct message conversation:

- From the Messages page.
- From user profiles and from hovers on users names.
- From the Message Notification and the New Message Button components on community pages.
- By sharing a feed post as a direct message.

Members can also flag messages that are spam or inappropriate. They can also opt to receive email notifications when someone sends them a direct message or responds to a conversation they're a part of. Community members can access their direct message conversations by clicking **My Messages** in their user profile dropdown menu.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable direct messages:

- Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

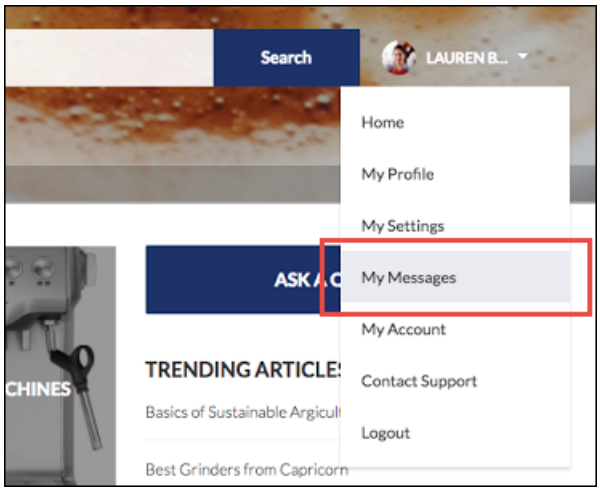
  Is a member of the community

To make all posts available to moderation, including direct messages, in Communities Settings under Community Moderation Rule Settings:

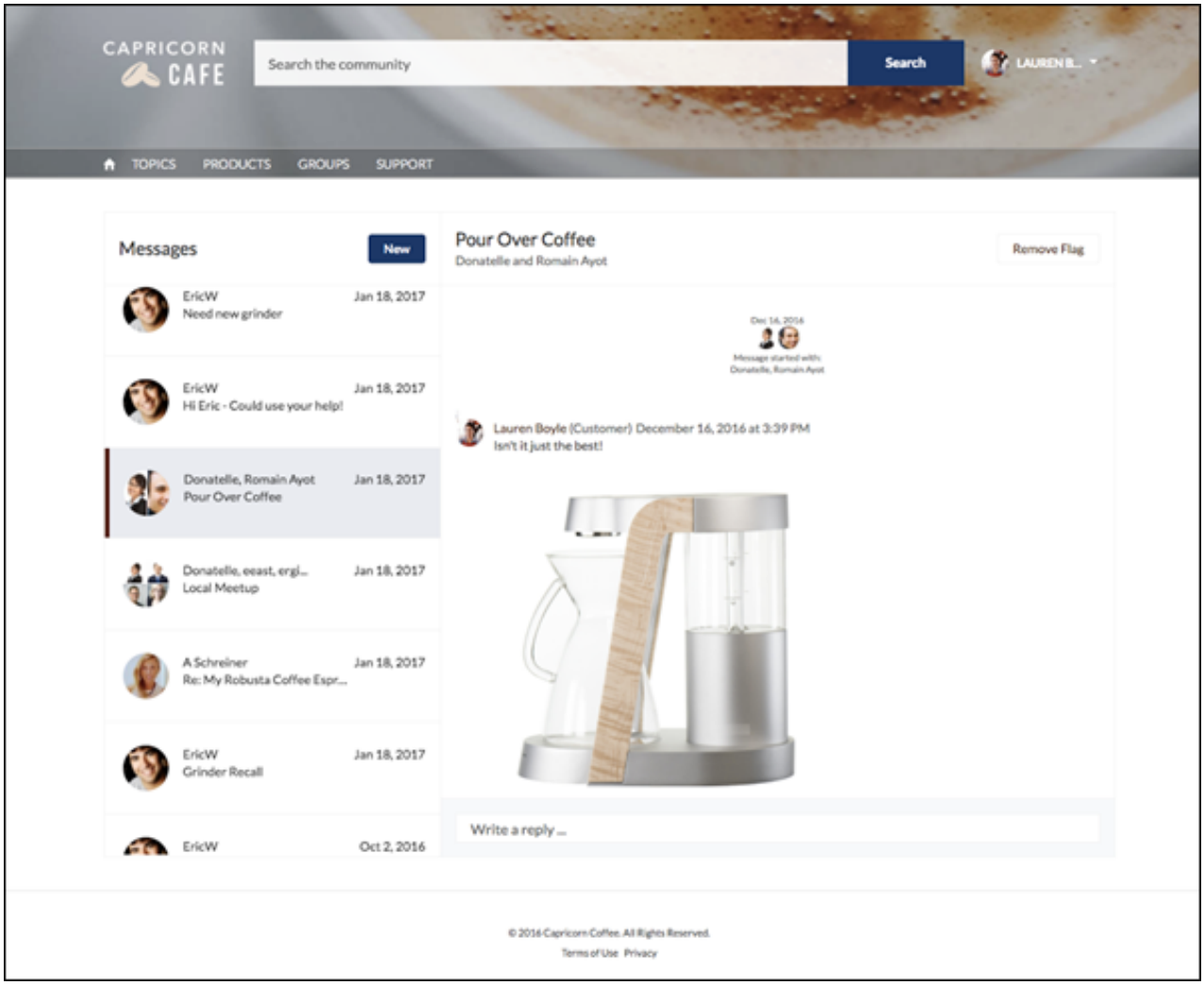
- Moderation applies to all feed posts regardless of where they are visible

To enable Chatter:

- Customize Application



Here's what the messages list view looks like:



SEE ALSO:

- Edit Community Pages and Components in Community Builder
- Moderate Flagged Direct Messages in Your Community
- Manage Your Community Email Notifications

Direct Message Limitations

Before you enable direct messages for your community, review these considerations.

- Direct messages require Chatter to be enabled in your org.
- Direct messages can be enabled only in Lightning communities and in Lightning Bolt Solutions.
- Users with the "View All Data" and "Modify All Data" permissions can't access direct message data unless they are participants in the conversation.
- Only users with the "Manage Chatter Messages and Direct Messages" permission can view all the direct messages data in your org.
- To moderate flagged direct messages, the moderator needs "Moderate Chatter Messages and Direct Messages" permission and the "Moderate Communities Chatter Messages" permission.
- To maintain privacy, community search doesn't show direct message in search results.
- When community members flag a direct message, the entire conversation is flagged. Individual messages can't be flagged.
- If you have private messages enabled in your community, they remain available. However, direct messages are better integrated with Lightning technology. We recommend that you switch to direct messages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For Developers

Direct messages are supported in the Chatter REST API. Under the hood, direct messages are a special implementation of feed posts and comments parented to a direct message entity. If you use the Chatter REST API to create a custom implementation of direct messages, a few things to keep in mind:

- The first message is stored as a feed post and the responses are stored as comments.
- Unlike other objects, direct messages can't have multiple feed posts associated with a single direct message conversation.
- You can't follow, like, share, mention people in, mute, and bookmark feed items associated with direct messages. You also can't associate topics with direct message feed items.
- Feeds associated with direct messages aren't accessible via search, public feeds, or streams.
- Email notifications for direct messages aren't supported for custom implementations built for the internal Salesforce org.
- In the community UI, direct messages display only to the participants in the conversation. However, Apex code runs in system mode, which means that the permissions of the current user aren't taken into account. This limitation has implications for pages that use Apex and Visualforce.
  - Review your Visualforce pages to ensure that direct message data isn't exposed.
  - Review your AppExchange apps that are written in Apex to ensure that direct message data isn't exposed.
  - Visualforce and Apex developers in your organization might be able to access direct message data.

Use permission sets, profile-level permissions, and sharing checks in your code to limit user access.

SEE ALSO:

Enable Direct Messages in Your Community

Set Up Question-to-Case

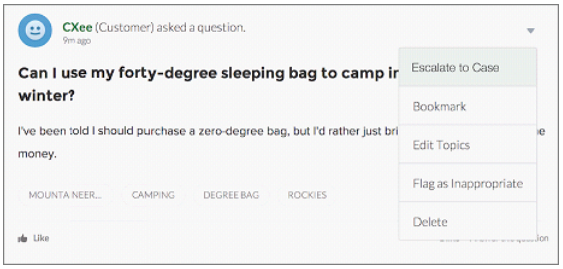
Add Question-to-Case to your communities, your Salesforce organization, or both.

Question-to-Case lets moderators create cases from unresolved questions in Chatter, which makes it easier to track and resolve your customers' issues. Moderators can create cases from questions directly in the feed, or you can set up processes—similar to workflow rules—in Process Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Question-to-Case is only available in communities where Chatter Questions is enabled.

IN THIS SECTION:

1. Question-to-Case Overview

   Question-to-Case lets moderators create cases from questions in Chatter, which makes it easier to track and resolve your customers' issues. Question-to-Case is available in the full Salesforce site and Salesforce mobile web, as well as in communities where Chatter Questions is enabled.

2. Enable Question-to-Case

   Question-to-Case lets moderators create cases from questions in Chatter to ensure that your customers' questions are quickly resolved. Enable Question-to-Case in your communities, Salesforce organization, or both.

3. Add the Question from Chatter Field to the Case Detail View

   When a case is created from a question in Chatter, the `Question from Chatter` field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.

4. Add the Escalate to Case Action to the Feed Item Layout

   Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

5. Confirm Access to the Escalate to Case Action

   Does your Salesforce org use more than one record type for cases? Make sure that the profiles that need Question-to-Case have access to the record type associated with the Escalate to Case action. If your org has only one record type for cases, skip this process.

6. Customize the Escalate to Case Action Layout
   Choose which fields appear on the Escalate to Case action, and in what order, based on the information you need to track for each case.
7. Automatically Assign Cases from Questions to a Queue
   Case assignment rules aren't supported in Question-to-Case, so by default, cases created from questions are assigned to the moderator who escalates the question. You can write a workflow rule or process that automatically adds cases that were created from questions to a queue so agents can claim them.
8. Automatically Create Cases from Unresolved Questions in Chatter
   As your community or organization develops, ensure that users get speedy answers to their questions. Question-to-Case lets moderators escalate unresolved questions to cases in the feed, but you can make your case resolution process even more efficient by setting up processes—similar to workflow rules—in Process Builder. Set up a process that automatically creates a case from questions that meet specified criteria.
9. Create a Case from a Question in Chatter
   If a question in Chatter hasn't been resolved, moderators can create a case from the question. Question-to-Case must be enabled in your organization or community.

Question-to-Case Overview

Question-to-Case lets moderators create cases from questions in Chatter, which makes it easier to track and resolve your customers' issues. Question-to-Case is available in the full Salesforce site and Salesforce mobile web, as well as in communities where Chatter Questions is enabled.

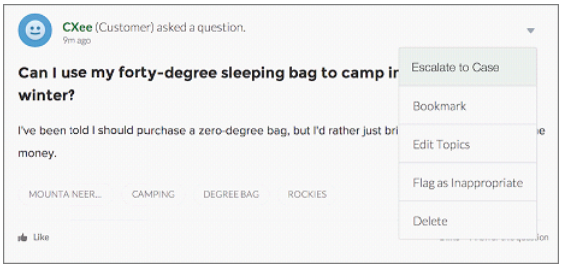
When a customer uses the Question action in Chatter to ask a question, similar questions and Knowledge articles appear below the Chatter publisher. If the similar questions and articles don't address the issue, the customer posts the question.

If a question isn't resolved, you can escalate the question to a case. Users with the "Moderate Chatter" or "Moderate Communities Feeds" user permission can create cases from questions directly in the feed, or you can set up processes—similar to workflow rules—in Process Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.

EDITIONS

Available in: Salesforce Classic

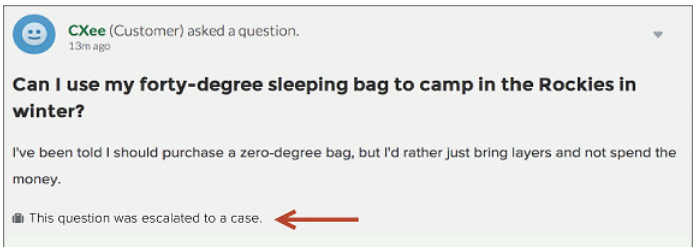
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



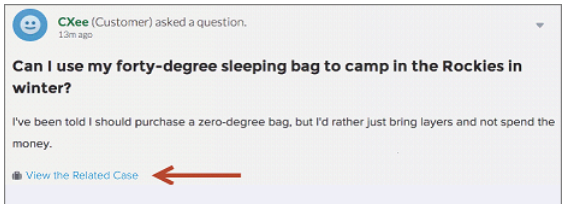
When a customer's question is turned into a case, the customer receives an email with the case number and a link to the case. The customer can view the case via a link on the question that's visible only to them, while moderators see a note on the question indicating that a case was created.

Note: The person who asked the question must have access to cases so they can view their case.

Moderator Flag

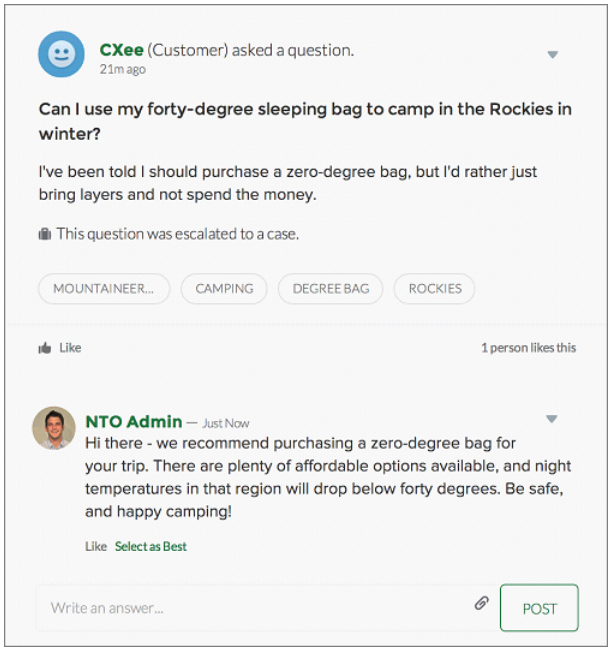


Customer Flag



Note: On escalated questions in Salesforce (as opposed to communities), the notification is visible to all users, not just moderators.

When agents find a solution, they can respond to questions directly from the console, and the customer sees the agent's response on the question or in the My Cases view. Agents choose whether the reply is visible to the community, or only to the customer who asked the question.



To get started, see Set Up Question-to-Case.

Enable Question-to-Case

Question-to-Case lets moderators create cases from questions in Chatter to ensure that your customers' questions are quickly resolved. Enable Question-to-Case in your communities, Salesforce organization, or both.

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. To enable Question-to-Case in all communities where Chatter Questions is enabled, select **Enable Question-to-Case in Communities**.
3. To enable Question-to-Case in your Salesforce organization, select **Enable Question-to-Case in Salesforce**.
4. Click **Save**.

Note: Make sure your case page layout is feed-based. The feed-based case page layout lets agents and moderators use the Community action to respond to escalated questions. If your organization was created before Spring '14, your case page layout may not be feed-based.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Question-to-Case:
- Customize Application

Add the Question from Chatter Field to the Case Detail View

When a case is created from a question in Chatter, the Question from Chatter field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.

First, use field-level security to specify which users can see the Question from Chatter field on case detail pages.

1. From the object management settings for cases, go to Fields.
2. Click **Question from Chatter**.
3. Click **Set Field-Level Security**.
4. Select **Visible** for any profile that you want to be able to use Question-to-Case.
5. Click **Save**.

After you make the field visible to users, you can choose to add it to the Case Details view.

1. From the object management settings for cases, go to Page Layouts.
2. Click **Edit** next to the page layout that you want to customize.
3. Drag the Question from Chatter field from the Fields section of the page layout editor palette to the Case Information section of the page.
4. Click **Save**.
5. Click **Page Layout Assignment** to confirm that the user profiles which need Question-to-Case are assigned to the page layout that you customized. In addition, assign internal users who need access to the Question from Chatter field on cases to that page layout.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To customize page layouts
- Customize Application

SEE ALSO:

Find Object Management Settings

Add the Escalate to Case Action to the Feed Item Layout

Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

1. From Setup, enter *Feed Item* in the Quick Find box, then select **Feed Item Layouts**.
2. Click **Edit** next to Feed Item Layout.
3. Drag the Escalate to Case action from the Quick Actions category in the palette to the Quick Actions in the Salesforce Classic Publisher section.
4. Click **Save**.
5. Click **Page Layout Assignments** to confirm that the user profiles that need Question-to-Case are assigned to the Feed Item Layout.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit page layouts:
- Customize Application

Confirm Access to the Escalate to Case Action

Does your Salesforce org use more than one record type for cases? Make sure that the profiles that need Question-to-Case have access to the record type associated with the Escalate to Case action. If your org has only one record type for cases, skip this process.

First, check which record type is assigned to the profiles that need access to the Escalate to Case action.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click the name of a profile.
3. In the Record Type Settings section, make a note of which case record types the profile uses.
4. In the Permissions section, make sure that the user profile has either the **Moderate Chatter** or **Moderate Communities Feeds** permission enabled.

Then, check which record type the Escalate to Case action uses, and change it if necessary.

1. From Setup, enter *Actions* in the Quick Find box, then select **Feed Item Actions**.
2. Click **Edit** next to the Escalate to Case action.
3. Confirm that the Record Type field shows a record type that's assigned to the profiles that need access to this action. If it doesn't, select an appropriate record type from the drop-down list.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Record types available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign record types:
- Customize Application

Customize the Escalate to Case Action Layout

Choose which fields appear on the Escalate to Case action, and in what order, based on the information you need to track for each case.

1. From Setup, enter *Actions* in the Quick Find box, then select **Feed Item Actions**.
2. Click **Layout** next to the Escalate to Case action.
3. Drag any fields you want to add to the action from the action layout editor palette, and reposition them if necessary.
4. Click **Save**.

Note: In public communities, you can't look up a contact when the case is submitted, so we recommend that you remove the Contact field from the Case Action layout.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize page layouts:
- Customize Application

Automatically Assign Cases from Questions to a Queue

Case assignment rules aren't supported in Question-to-Case, so by default, cases created from questions are assigned to the moderator who escalates the question. You can write a workflow rule or process that automatically adds cases that were created from questions to a queue so agents can claim them.

You can assign escalated questions to a queue in several ways. The basic approach is to write a process in Process Builder that automatically assigns a case to a specified queue when the Type field on the case equals Question. You can also build the process to accommodate multiple queues. For example, have your process assign cases with a certain topic to a different queue.

The way you use queues in escalated questions depends on your users, your goals, and more. Find an approach that best fits your business needs.

To learn how to create a queue, see Create Queues.

EDITIONS

Available in: Salesforce Classic

Question-to-Case is available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Automatically Create Cases from Unresolved Questions in Chatter

As your community or organization develops, ensure that users get speedy answers to their questions. Question-to-Case lets moderators escalate unresolved questions to cases in the feed, but you can make your case resolution process even more efficient by setting up processes—similar to workflow rules—in Process Builder. Set up a process that automatically creates a case from questions that meet specified criteria.

Important: These steps apply only to organizations and communities that use Chatter Questions. Not sure if that's you? See Differences Between Q&A Features in Salesforce.

You can use Question-to-Case in processes in several ways. For example, consider setting up processes that:

- Create a case from a question if a week has passed, the question has received more than 10 likes, and a best answer hasn't been selected.
- Create a case from a question immediately if the question contains the word "competitor."

EDITIONS

Available in: Salesforce Classic

Question-to-Case is available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Process Builder is available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Processes related to Question-to-Case act on the Feed Item object. The process includes a flow that evaluates whether question posts meet your escalation criteria. You can create flow variables based on several Feed Item fields, including:

- `BestCommentId`: The ID of the comment that was selected as the best answer. If no comment has been selected as the best answer, this field is null.
- `CommentCount`: The number of comments on a question.
- `LikeCount`: The number of likes on a question.

Tip:

- Each flow variable's data type must match the feed item field's data type. `CommentCount` and `LikeCount` are number fields, while `BestCommentId` is a text field.
- The creation of a feed item can trigger a process, but updates to feed items (such as likes and comments) cannot. Depending on your process, you might need to specify how much time must pass before a related flow runs.

Create a Case from a Question in Chatter

If a question in Chatter hasn't been resolved, moderators can create a case from the question. Question-to-Case must be enabled in your organization or community.

1. Navigate to the question in the feed.
2. Select **Escalate to Case** in the action drop-down menu.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a case from a question in Salesforce:

- Moderate Chatter OR Modify All Data

  AND

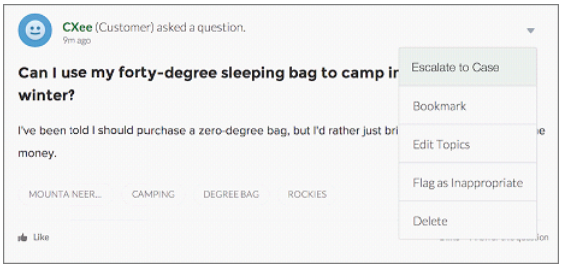
  Create on cases

To create a case from a question in a community:

- Moderate Chatter OR Modify All Data OR Moderate Communities Feeds

  AND

  Create on cases



A window appears that's pre-populated with the case subject, contact, and description. Unless Question-to-Case has a queue associated with it, the case is automatically assigned to you.

3. If needed, edit the case details.
4. Create the case.

After a case is created from a Chatter question, the customer who asked the question receives an email notifying them that a case was created from their question. The email provides the case number and a link to the case.

Agents can post a response to the question directly from the case feed using the Community action in the publisher. Agents choose who can view the response by selecting either "Customer Only" or "Everyone". They can also navigate to the original question from the case's detail page by clicking the link in the `Question from Chatter` field.

Enable Salesforce Knowledge in Your Community

Enable Salesforce Knowledge to quickly get articles to your customers and agents in a community. Knowledge articles provide accurate information to customers when and where they need it.

Note:

- Your Salesforce org needs at least one Salesforce Knowledge license to enable and set up Salesforce Knowledge.
- Salesforce Tabs +Visualforce community members without the Knowledge One permission can't access Salesforce Knowledge through communities. They also can't access Salesforce Knowledge in communities via Salesforce mobile web, Salesforce for Android, or Salesforce for iOS.

If you haven't yet, check out Salesforce Knowledge. After setting up your knowledge base, either in Salesforce Classic or Lightning Experience, complete the following steps to view articles in your communities.

1. Update profiles to give users Read permissions:
   a. In Setup, enter `Profiles` in the Quick Find box, and then click **Profiles**.
   b. Either clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles to enable the Read permission, or use a permission set. Give Read permission for the article types (if using Salesforce Knowledge in Classic) or record types (if using Lightning Knowledge) that you want to share with community users.
   c. Give Read permissions to each guest user profile you'd like to have access to Salesforce Knowledge.

      Note: Users may try to access articles which can no longer be found. For example, the article may be deleted, archived, doesn't exist, or the user doesn't have access to view it. In this case, guest users are directed to a login page. Users that are already logged in see an "Invalid Page" error.

2. If you want your community users to have different category group visibility settings, change the visibility settings by permission set, profile, or role. For example, you can prohibit users with the Customer Community User profile from seeing articles in a certain category group by changing the profile's data category visibility.
3. Enable Topics for Objects (accessed only in Salesforce Classic) for any Salesforce Knowledge objects.
   a. In Classic Knowledge, objects include any article type you create during setup.
   b. In Lightning Knowledge, enable topics for the Knowledge object.
4. While Salesforce Knowledge uses data categories to organize content, Lightning communities use topics. You can easily map the articles in your data categories to topics in a community. To map articles to topics automatically:
   a. In Community Workspaces, click **Content Management** > **Topics** > **Automatic Topic Assignment**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Communities is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. The Help Center template is available in **Essentials** Edition.

Salesforce Knowledge is available in: **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** Edition.

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities

  AND

  Is a member of the community

To set up Salesforce Knowledge, create article types and article actions, and modify category groups assignments:
- Customize Application

  AND

  Manage Salesforce Knowledge

To assign user licenses:
- Manage Internal Users

To create data categories:
- Manage Data Categories

b. After enabling Automatic Topic Assignment, map topics to data category groups and data categories. You can choose to add the topics to all the articles existing in data categories, and to articles added in the future. You can map your exact hierarchy from data categories to topics, up to eight levels of depth.

5. Map articles to topics automatically.

Although Salesforce Knowledge uses data categories to organize content, and Lightning communities use topics, you can easily map the articles in your data categories to topics in a community.

6. Enable thumbs up and thumbs down voting on articles in your community so you can identify helpful articles and ones that need improvement.

a. In Community Builder, navigate to the Article Detail page.

b. Click the Article Content component to view its properties.

c. In the property editor, select **Enable Article Voting** and customize the vote prompt and confirmation text if desired.

d. Publish your changes.

SEE ALSO:

Salesforce Knowledge

Build Your Knowledge Base in Salesforce Classic

Enable Ideas in Your Community

Ideas enable a group of users to post, vote for, and comment on ideas. Enabling Ideas in a community provides an online, transparent way for you to attract, manage, and showcase innovation.

To manage organization-wide settings for Ideas, follow these high-level steps:

1. From Setup, enter *Ideas Settings* in the Quick Find box, then select **Ideas Settings**

a. To enable Ideas for your organization, select the Enable Ideas checkbox.

Once you enable the HTML editor, you can't disable it.

b. Optionally, select Enable Text-Formatting, Images and Links to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.

c. Ensure that the multi-select Categories field is enabled by clicking the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the Categories field enabled.

d. To let Ideas members associate more than one category with an idea, select Enable Categories. Once you enable multi-select categories, you can't disable it.

e. To let users earn points and ratings based on their activity in each zone, select Enable Reputations.

f. In the Half-Life (in Days) field, enter the number of days.

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

2. Define and customize fields for Ideas:

a. Define picklist values for the Categories and Status fields.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize Ideas settings:
- Customize Application

To view Ideas:
- Read on Ideas AND Read on Idea Themes

Make sure that you add the categories and statuses to the zones you'll be including in the community.

b. Set field-level security for standard and custom fields.

c. Create custom fields and set validation rules on them.

Custom fields appear in the Additional Information section on the Post Idea and Idea Detail pages.

d. Optionally, add the `Attachment` field to the layout and set field-level security to enable users to add files to their ideas.

3. To enable experts within your zones, create a public group that includes these users.
4. Optionally, enable Idea Themes in your organization.
5. Create one or more zones to organize ideas into logical groups, and associate the zones with the community.
6. Customize your Ideas page layouts to display the information you want to see.
7. Create validation rules that prevent offensive language from being used in the zone
8. Set up Apex triggers and validation rules for comments on ideas.
9. Enable user profiles for community members and moderators and ensure the profiles can access Ideas.

Important: To view Ideas, guest user profiles created after October 1, 2018 must have the Read on Ideas and Read on Idea Themes user permissions manually enabled.

10. Add the Ideas tab and the Idea Themes tab to the community.

SEE ALSO:

Enable and Customize Ideas Settings

Set Up Approvals for External Users in Your Community

Customer and partner users in your community can be assigned as approvers on records or added directly to queues. They can see and take action through the My Approvals and Approval History related lists on the record. Approvals can also be triggered directly from the Chatter feed.

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.

Note:

- Users with high-volume licenses, such as High Volume Customer Portal and Authenticated Website, can't approve records.
- External users with legacy portal licenses can approve records in communities, but not in portals.

When setting up approvals or queues, use the lookup fields to find customer and partner users.

For example, when setting up an approval, if you want to automatically assign a customer user as an approver use the lookup list to find and specify the user.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, delete, or clone approval processes:

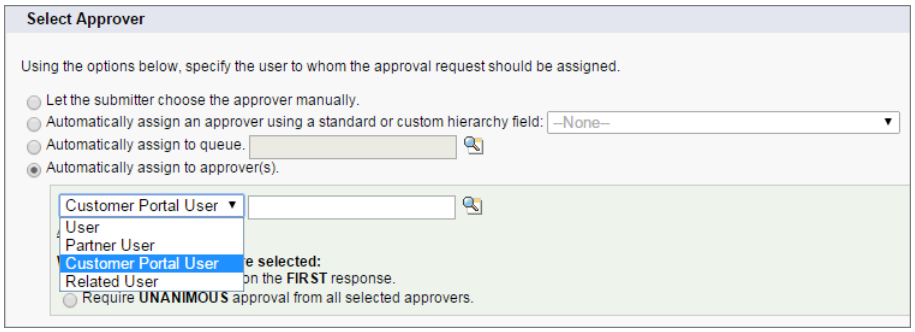
- Customize Application

To create or change queues:

- Customize Application

AND

Manage Public List Views



If you set up email notifications for your approval workflows, emails are sent based on community membership. If the user is a member of multiple active communities, the email comes from the oldest active community. Any links included in the email point users directly to the approval within the community.

In the Salesforce app, users can see and take action from the Approval History related list, but they can't submit requests for approval. To submit requests for approvals, the user must do so from the full Salesforce site.

SEE ALSO:

- Set Up an Approval Process
- Approval Limits
- Create Queues

Enable Analytics in Your Community

Enable Analytics for Communities to allow your partner and customer users to view and explore Analytics dashboards in your community.

Note: Only users with a Customer Community Plus, Partner Community, or Lightning External Apps Plus license can use this feature. This feature is supported in communities but not in portals.

Complete the following steps to share Analytics dashboards in your community.

1. Set up Analytics in your Salesforce org, as described in the Analytics Platform Setup section.
2. Enable Analytics for Communities and set up community members. See Enable Analytics for Communities.
3. In Analytics, create dashboards and save them in an Analytics app. Designate that app for sharing with the community. For more information about working with Analytics, refer to the Analytics Library.
4. Embed your Analytics dashboards using either Community Builder or Visualforce.
5. From the Analytics app containing your dashboards, give access to community members by selecting **Share**. In the Share dialog, select **Enable sharing with Communities**. Invite community partners and customers to share the app.

For information, see Share Analytics with Communities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Communities is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Analytics is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in: **Developer** Edition

USER PERMISSIONS

To create, customize, or activate a community:

- Create and Set Up Communities

  AND is a member of the community they're trying to update

To modify Analytics settings:

- Analytics Platform permission set license with Manage Analytics permission

To view, explore, and share embedded Analytics dashboards:

- Analytics for Communities permission set license with View Analytics on Communities pages permission

Additional Communities Limitations

Here are a few limitations when using features in communities.

- Drag-and-drop scheduling using events and calendars is not available in communities.
- Channel Programs and Market Development Fund object list views and records do not display on Salesforce for iOS.
- You can't create or edit reports in Lightning communities.
- Partner users can't create account teams and add members to them.
- Partner users can't edit or delete members of an account shared with them by an internal user.
- The default account teams option is not available for communities.
- Partner and portal users do not receive emails to notify them of upcoming tasks. Reminder notifications are displayed on the bell icon.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Deploy a Community from Sandbox to Production

We recommend creating, customizing, and testing your community in a test environment first, before you deploy it to your production org.

When testing is complete, you can use change sets or the Metadata API to migrate your community from one org to another. Both options are ideal for building and testing a community in a test environment, such as sandbox, and then deploying to another org, such as production.

- **Change sets**—If you're more comfortable working with point-and-click tools, then change sets are your deployment friend.

  Change sets represent sets of customizations in your org (or metadata components) that you can deploy to a connected org.

- **Metadata API**—Up to speed on the Metadata API and more comfortable in the world of code? Then use the Metadata API to deploy changes programmatically.

  The Metadata API lets you retrieve, deploy, create, update, or delete customization information for your org, such as communities, custom object definitions, and page layouts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Deploy Your Community with Change Sets

Use change sets to move your community between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your community in your test environment and then migrate the community to production when testing is complete.

Considerations for Deploying Communities with Change Sets

Keep the following considerations and limitations in mind when migrating your Lightning or Salesforce Tabs + Visualforce community with change sets.

Deploy Your Community with the Metadata API

Use the Metadata API to move your community from one Salesforce org to another. Set up and test your community in your test environment, and then retrieve the community's data and deploy it to your production org.

Deploy Your Community with Change Sets

USER PERMISSIONS	
To customize or publish a community:	Create and Set Up Communities
To edit deployment connections and use inbound change sets:	Deploy Change Sets AND Modify All Data Note: If a user requires access only to metadata for deployments, you can enable the Modify Metadata Through Metadata API Functions permission. This permission gives such users the access they need for deployments without providing access to org data. For details, see "Modify Metadata Through Metadata API Functions Permission" in Salesforce Help.
To use outbound change sets:	Create and Upload Change Sets, Create AppExchange Packages, AND Upload AppExchange Packages

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use change sets to move your community between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your community in your test environment and then migrate the community to production when testing is complete.

You can use change sets to move Lightning communities and Salesforce Tabs + Visualforce communities.

1. Create and test your community in your preferred test org, such as sandbox.
2. From Setup in your test org, enter `Outbound Change Sets` in the Quick Find box, and then select **Outbound Change Sets**.
3. Create a change set, and click **Add** in the Change Set Components section.
4. Select the **Network** component type, choose your community, and then click **Add to Change Set**.
5. To add dependent items, click **View/Add Dependencies**. We recommend selecting all the dependencies listed.

   Tip:

   - For navigation menus that link to standard objects, custom list views aren't included as dependencies. Manually add the custom list view to your change list.
   - Manually add new or modified profiles or permission sets referenced in **Administration** > **Members**.
   - The list of dependencies has two Site.com items—`MyCommunityName` and `MyCommunityName1`. `MyCommunityName` holds the various Visualforce pages that you can set in Administration (in Community Workspaces or Community Management). `MyCommunityName1` includes the pages from Community Builder.

6. Click **Upload** and select your target org, such as production.

   Make sure that the target org allows inbound connections. The inbound and outbound orgs must have a deployment connection.
7. From Setup, select **Inbound Change Sets** and find the change set that you uploaded from your source org.
8. Validate and deploy the change set to make it available in the target org.

Warning: When you deploy an inbound change set, it overwrites the community in the target org.

9. Manually reconfigure any unsupported items in the target org community.
10. Add data for your community, and test it to make sure that everything works as expected. Then publish your changes to go live.

SEE ALSO:

Considerations for Deploying Communities with Change Sets
Change Sets Best Practices
Upload Outbound Change Sets
Deploy Inbound Change Sets

Considerations for Deploying Communities with Change Sets

Keep the following considerations and limitations in mind when migrating your Lightning or Salesforce Tabs + Visualforce community with change sets.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General

- When you deploy an inbound change set, it overwrites the community in the target org. So although you can't use a change set to delete a component, such as a community, you can delete the pages within a Lightning community. For example, let's say you delete pages from a Lightning community in sandbox and then create an updated outbound change set. When you redeploy the change set in a target org, such as production, the pages are also deleted there.
- If you update the community template in the source org to unify its Community Builder branding properties, ensure that you also update the template in the target org before deploying the change set.

Administration

Administration settings are in Community Workspaces or Community Management.

- Remember to add any new or modified profiles or permission sets referenced in **Administration** > **Members** to your outbound change set. They're not automatically included as dependencies.
- For communities created in a sandbox org before the Summer '17 release, you must resave administration settings prior to migration to transfer them successfully.
- Until you publish your community in the target org, settings for the change password, forgot password, home, self-registration, and login pages appear to return to their default values.
- To update settings in the Members area and the Login & Registration area, you must deploy the changes in separate change sets. First update and deploy the Members area setting, and then update and deploy the Login & Registration settings.

Navigation Menu

The Navigation Menu component is available in Community Builder for Lightning communities.

- For menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies.
- Until you publish you community in the target org, menu items that point to community pages appear to be broken.

Recommendations

- Updates to recommendation names aren't supported. If you change the name of a recommendation in the source org having previously migrated it, the target org treats it as a new recommendation.
- Recommendation images aren't supported.
- When you deploy an inbound change set, it overwrites the target org's scheduled recommendations with those from the source org.

Unsupported Settings and Features

The following items aren't supported. Manually add them after you deploy the inbound change set.

- Navigational and featured topics
- Audience targeting
- Dashboards and engagement
- Recommendation images
- Branding panel images in Community Builder
- The following Administration settings in Community Workspaces or Community Management:
  - The Account field in the Registration section of the Login and Registration area
  - The **Select which login options to display** option in the Login section of the Login and Registration area
  - The Settings area
  - The Rich Publisher Apps area

SEE ALSO:

Change Sets Best Practices

Change Sets Implementation Tips

Deploy Your Community with Change Sets

Deploy Your Community with the Metadata API

Use the Metadata API to move your community from one Salesforce org to another. Set up and test your community in your test environment, and then retrieve the community's data and deploy it to your production org.

You can use the Metadata API to move Lightning communities and Salesforce Tabs + Visualforce communities.

The following metadata types combine to define a community. To successfully migrate a community, use the Metadata API `retrieve` call to retrieve XML file representations of your org's components.

- `Network`—Represents a community. Contains administration settings, such as page override, email, and membership configurations.
- `CustomSite`—Contains the domain and page setting information, including `indexPage`, `siteAdmin`, and URL definitions.
- `SiteDotCom`—Contains the community site layout.

For additional information on these metadata types and instructions on migrating data, see the *Metadata API Developer Guide* and the *Ant Migration Tool Guide*.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tips and Considerations

- Before migrating data to another org, enable Communities in the destination org and enter the same domain name that you used in your sandbox org to avoid getting an error.
- For each community, the network component has a unique name and URL path prefix. When you retrieve the network component, the generated XML file name is based on the name of the network. When migrating, the API looks at the file name and if it exists, updates the community. If it doesn't exist, the API creates a community. If someone changes the community name in the sandbox and then tries to migrate, they see an error because the API is trying to create a community with the existing path prefix.
- Examine the XML file for `CustomSite` to make sure that all dependencies are brought over. If any are missing, explicitly state them in the XML file.
- In addition to the `Network`, `CustomSite`, and `SiteDotCom` components, include all the other components required by your community, such as custom objects, custom fields, custom Lightning components, and Apex classes.
- If you rename a community in **Administration** > **Settings**, make sure that the source and target communities have matching values for the `picassoSite` and `site` attributes in the `Network` component.
- If there are any changes to the guest user profile, include the profile as part of the community migration.
- When you migrate user profiles, users are added to the community in the production org. Emails are then sent to members in the same way as for any new community.

Sample Template

The following sample contains all of the fields that you can migrate through the Metadata API.

```
<?xml version="1.0" encoding="UTF-8"?>
<Network xmlns="http://soap.sforce.com/2006/04/metadata">
    <allowInternalUserLogin>true</allowInternalUserLogin>
    <allowMembersToFlag>true</allowMembersToFlag>
    <allowedExtensions>txt,png,jpg,jpeg,pdf,doc,csv</allowedExtensions>
   <caseCommentEmailTemplate>unfiled$public/ContactFollowUpSAMPLE</caseCommentEmailTemplate>


<changePasswordTemplate>unfiled$public/CommunityChangePasswordEmailTemplate</changePasswordTemplate>

    </communityRoles>
    <disableReputationRecordConversations>true</disableReputationRecordConversations>
    <emailSenderAddress>admin@myorg.com</emailSenderAddress>
    <emailSenderName>MyCommunity</emailSenderName>
    <enableCustomVFErrorPageOverrides>true</enableCustomVFErrorPageOverrides>
    <enableDirectMessages>true</enableDirectMessages>
    <enableGuestChatter>true</enableGuestChatter>
    <enableGuestFileAccess>false</enableGuestFileAccess>
    <enableInvitation>false</enableInvitation>
    <enableKnowledgeable>true</enableKnowledgeable>
    <enableNicknameDisplay>true</enableNicknameDisplay>
    <enablePrivateMessages>false</enablePrivateMessages>
    <enableReputation>true</enableReputation>
    <enableShowAllNetworkSettings>true</enableShowAllNetworkSettings>
    <enableSiteAsContainer>true</enableSiteAsContainer>
    <enableTalkingAboutStats>true</enableTalkingAboutStats>
    <enableTopicAssignmentRules>true</enableTopicAssignmentRules>
    <enableTopicSuggestions>true</enableTopicSuggestions>
    <enableUpDownVote>true</enableUpDownVote>
```

```
<forgotPasswordTemplate>unfiled$public/CommunityForgotPasswordEmailTemplate</forgotPasswordTemplate>

    <gatherCustomerSentimentData>false</gatherCustomerSentimentData>
    <lockoutTemplate>unfiled$public/CommunityLockoutEmailTemplate</lockoutTemplate>
    <maxFileSizeKb>51200</maxFileSizeKb>
    <navigationLinkSet>
        <navigationMenuItem>
            <label>Topics</label>
            <position>0</position>
            <publiclyAvailable>true</publiclyAvailable>
            <target>ShowMoreTopics</target>
            <type>NavigationalTopic</type>
        </navigationMenuItem>
    </navigationLinkSet>
    <networkMemberGroups>
        <permissionSet>MyCommunity_Permissions</permissionSet>
        <profile>Admin</profile>
    </networkMemberGroups>
    <networkPageOverrides>
       <changePasswordPageOverrideSetting>VisualForce</changePasswordPageOverrideSetting>

        <forgotPasswordPageOverrideSetting>Designer</forgotPasswordPageOverrideSetting>
        <homePageOverrideSetting>Designer</homePageOverrideSetting>
        <loginPageOverrideSetting>Designer</loginPageOverrideSetting>
        <selfRegProfilePageOverrideSetting>Designer</selfRegProfilePageOverrideSetting>
    </networkPageOverrides>
    <picassoSite>MyCommunity1</picassoSite>
    <selfRegistration>true</selfRegistration>
    <sendWelcomeEmail>true</sendWelcomeEmail>
    <site>MyCommunity</site>
    <status>Live</status>
    <tabs>
        <defaultTab>home</defaultTab>
        <standardTab>Chatter</standardTab>
    </tabs>
    <urlPathPrefix>mycommunity</urlPathPrefix>
    <welcomeTemplate>unfiled$public/CommunityWelcomeEmailTemplate</welcomeTemplate>
</Network>
```

Sample `package.xml` Manifest File

A manifest file defines the components that you're trying to retrieve. The following sample shows a `package.xml` manifest file for retrieving all the components of a community.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>Network</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomSite</name>
    </types>
```

```
    <types>
        <members>*</members>
        <name>SiteDotCom</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomTab</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomObject</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexPage</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexComponent</name>
    </types>
    <types>
        <members>*</members>
        <name>Portal</name>
    </types>
    <types>
        <members>*</members>
        <name>Profile</name>
    </types>
    <types>
        <members>*</members>
        <name>Document</name>
    </types>
    <version>43.0</version>
</Package>
```

SEE ALSO:

Deploy Your Community with Change Sets

Community Authentication and Security

You can help keep your community more secure by enabling clickjack and other protections, authenticating users, and encrypting some of the community's data.

IN THIS SECTION:

Enable Clickjack Protection in Communities
Clickjacking is a type of attack that tricks users into clicking something, such as a button or link, because they perceive it to be safe. By creating hidden iframes pointing to your community pages, hackers can entice users to click an element that appears to be on a different web page. But instead of the visible element handling the click, the click is hijacked and some element of the invisible community iframe on top receives it. Clickjacking can potentially lead to data intrusion, unauthorized emails, changed credentials, or other malicious site-specific results. With clickjack protection, however, you can secure your community by controlling whether browsers allow frames pointing to your community pages.

Authenticate Community Users
You have several options for authenticating both external and internal users in your community. External users are users with Community, Customer Portal, External Identity, or partner portal licenses. By default, they can log in with the username and password that Salesforce assigns them for the community. Your org's internal users are employees with full Salesforce licensing capabilities. These users follow the employee login flow using their Salesforce username and password. Beyond these default settings, you can configure SAML, external authentication providers, or OAuth to authenticate all users in your community. You can also configure self-registration to use Login Discovery, which makes it easier for users to authenticate.

Encrypt Community Data
You can add a measure of security to your community by encrypting files, attachments, and many popular data fields.

Content Security Policy in Lightning Communities
Lightning communities use Content Security Policy (CSP), a W3C standard that controls the source of content that can be loaded on your community's pages. CSP helps protect against cross-site scripting (XSS) attacks. With two different levels of security, you can optimize your site design choices and level of risk.

Enable Clickjack Protection in Communities

Clickjacking is a type of attack that tricks users into clicking something, such as a button or link, because they perceive it to be safe. By creating hidden iframes pointing to your community pages, hackers can entice users to click an element that appears to be on a different web page. But instead of the visible element handling the click, the click is hijacked and some element of the invisible community iframe on top receives it. Clickjacking can potentially lead to data intrusion, unauthorized emails, changed credentials, or other malicious site-specific results. With clickjack protection, however, you can secure your community by controlling whether browsers allow frames pointing to your community pages.

You can set clickjack protection to one of the following levels.

- **Allow framing by any page (no protection)**: The least secure level.
- **Allow framing of site or community pages on external domains (good protection)**: Allows framing of your community pages by pages on your external domains, but only if the domains are whitelisted.
- **Allow framing by the same origin only (recommended)**: The default level for Communities. Allows framing of community pages by pages with the same domain name and protocol security.
- **Don't allow framing by any page (most protection)**: The most secure level, but for Salesforce Tabs + Visualforce communities, it can cause certain pages to appear as blank pages. To avoid this issue, use the default setting instead.

Tip: The location for enabling clickjack protection differs depending on whether your community is a Lightning community or a Salesforce Tabs + Visualforce community. If your community has a mixture of both Lightning and Visualforce pages, enable clickjack protection in both locations.

Enable Clickjack Protection for Lightning Communities

1. In **Settings**, click **Security**.

2. Under **Clickjack Protection**, select a Clickjack Protection Level from the dropdown.

Enable Clickjack Protection for Salesforce Tabs + Visualforce Communities

1. In Community Workspaces, click **Administration** > **Pages** > **Go to Force.com**.
2. Click **Edit** on the Site Detail page.
3. Select your preferred level of clickjack protection and save your changes.
4. If you chose to allow framing of your community pages on your external domains, click **Add Domain** in the Whitelisted Domains for Inline Frames section and enter the domain that you want to allow iframes on.

Tip: Whitelisted domains take effect only when **Allow framing of site or community pages on external domains** is selected.

Note: Internet Explorer supports clickjack protection through the legacy X-Frame-Options HTTP Header only. This header supports `sameorigin`, `deny` (none), `allowall`, and `allow-from` *`uri`*. In particular, `allow-from` *`uri`* supports only one URI.

To support a list for IE users, the framing site must identify itself to the community domain by passing in a query parameter in the `iframe` tag. For example, if you add `https://example.com` as a whitelisted external domain, then the page on `https://example.com` must make its iframe as follows:

```
<iframe src="https://mysite.force.com?_iframeDomain=https://example.com"></iframe>
```

You can also set the whitelisted external domain in the `iframeDomain` cookie. This method allows iframes if the `_iframeDomain` URL variable isn't saved when navigating between pages in IE.

```
Cookie iframeDomainCookie = ApexPages.currentPage().getCookies().get('iframeDomain');

if (iframeDomainCookie == null) {
    iframeDomainCookie = new Cookie('iframeDomain','www.example.com');

    // Set the new cookie for the page
    ApexPages.currentPage().setCookies(new Cookie[]{iframeDomainCookie});
}
```

Authenticate Community Users

You have several options for authenticating both external and internal users in your community. External users are users with Community, Customer Portal, External Identity, or partner portal licenses. By default, they can log in with the username and password that Salesforce assigns them for the community. Your org's internal users are employees with full Salesforce licensing capabilities. These users follow the employee login flow using their Salesforce username and password. Beyond these default settings, you can configure SAML, external authentication providers, or OAuth to authenticate all users in your community. You can also configure self-registration to use Login Discovery, which makes it easier for users to authenticate.

Note: The following authentication options also work with custom HTTPS web addresses.

IN THIS SECTION:

Configure SAML for Communities

If your organization uses an existing single sign-on capability to simplify and standardize your user authentication, you can extend this capability to communities.

Configure Authentication Providers

Internal and external users can access a community through an external authentication provider that supports the OpenID Connect protocol. For example, if you configure Facebook as an external authentication provider, your users log in to Facebook through a link on the community login page. Facebook authenticates the user, allowing them access to the community.

Configure Authentication Flows with OAuth

If your organization wants to build integrations between communities and custom-branded apps, such as mobile or desktop apps, you can use OAuth to create a branded login page.

Verify Email Addresses with Async Email

Send email messages to internal and external users to ensure they're registered with a valid email address that they own. Async email messages contain a verification link (URL). Users simply click the link to verify their email address. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Community

Configure SAML for Communities

If your organization uses an existing single sign-on capability to simplify and standardize your user authentication, you can extend this capability to communities.

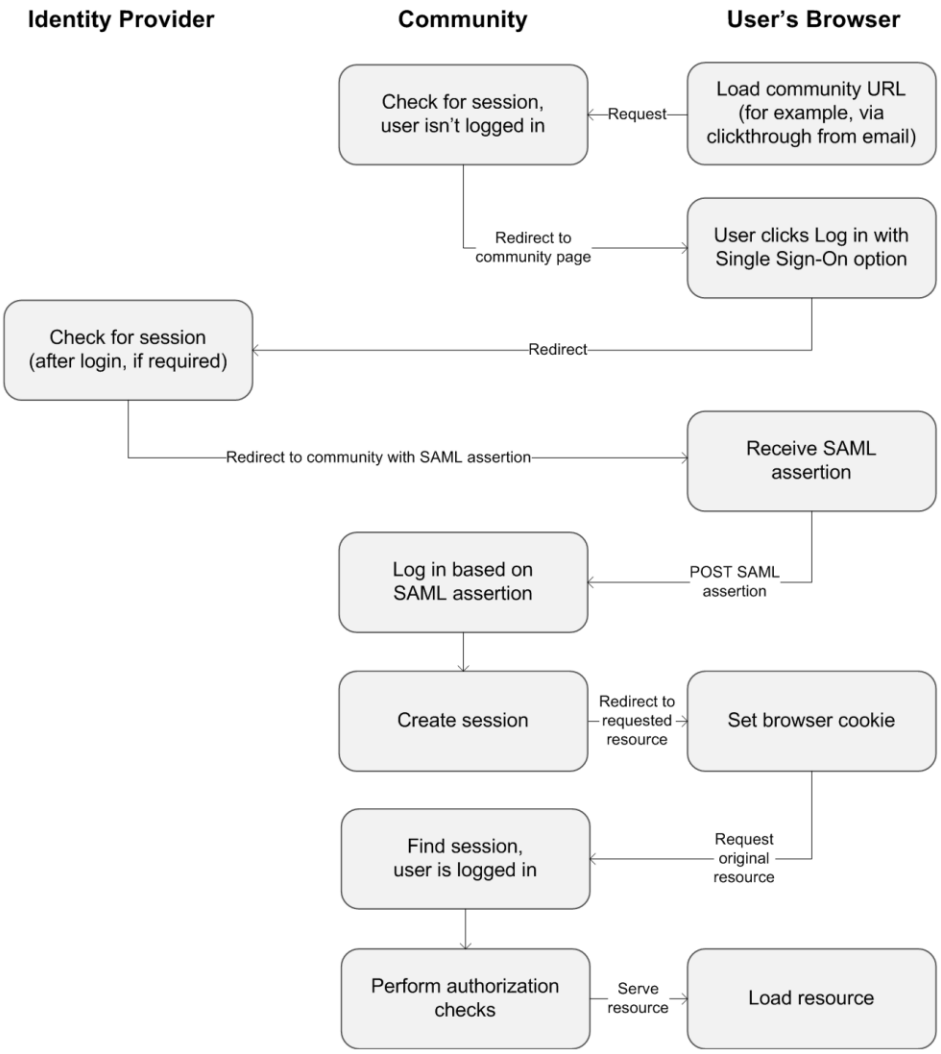
The following information assumes that you are already familiar with Security Assertion Markup Language (SAML) authentication protocols and know how to work with your identity provider to configure single sign-on for your organization. When implementing SAML for communities, the key is to use the community URL associated with login for the single sign-on flow. Also make sure that the community URL in the SAML assertion POST includes `/login`.

Here is a summary of how SAML requests and responses are processed between the user's browser, the community, and your identity provider.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



This table compares what's required for community SAML assertions to what's required for other types of Salesforce domains.

Requirement	Standard	Portal	Salesforce Sites	Community
URL where SAML assertion POST is made.	login.salesforce.com	login.salesforce.com	login.salesforce.com	*`community URL`*
Are `organization_id` and `portal_id` required in assertion?	No	Yes–passed as an attribute	Yes–passed as an attribute	No **Note:** Required if using Just-in-Time provisioning to create portal users in the community. Community-specific portal users can be provisioned with `portal_id` excluded.
Is `siteUrl` required in assertion?	No	No	Yes–passed as an attribute	No

The following sample SAML assertion shows the community URL specified as the Recipient, for a sample customer community in the Acme organization. This example applies to an organization that has a single SAML configuration.

```
<samlp:Response ID="_f97faa927f54ab2c1fef230eee27cba21245264205456"
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
   <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:nameid-format:
      entity">https://www.salesforce.com</saml:Issuer>

   <samlp:Status>
      <samlp:StatusCode Value="urn:oasis:names:tc:SAML:2.0:
         status:Success"/>
   </samlp:Status>

   <saml:Assertion ID="_f690da2480a8df7fcc1cbee5dc67dbbb1245264205456"
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
      <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:
         nameid-format:entity">https://www.salesforce.com</saml:Issuer>

      <saml:Subject>
         <saml:NameID Format="urn:oasis:names:tc:SAML:1.1:
            nameid-format:unspecified">saml_portal_user_federation_id
         </saml:NameID>

         <saml:SubjectConfirmation Method="urn:oasis:names:tc:
            SAML:2.0:cm:bearer">
         <saml:SubjectConfirmationData NotOnOrAfter=
            "2009-06-17T18:48:25.456Z"
            Recipient="https://acme.force.com/customers/login/?
saml=02HKiPoin4f49GRMsOdFmhTgi_0nR7BBAflopdnD3gtixujECWpxr9klAw"/>
         </saml:SubjectConfirmation>
      </saml:Subject>

      <saml:Conditions NotBefore="2009-06-17T18:43:25.456Z"
                       NotOnOrAfter="2009-06-17T18:48:25.456Z">

         <saml:AudienceRestriction>
            <saml:Audience>https://saml.salesforce.com</saml:Audience>
         </saml:AudienceRestriction>
      </saml:Conditions>

      <saml:AuthnStatement AuthnInstant="2009-06-17T18:43:25.456Z">

         <saml:AuthnContext>
            <saml:AuthnContextClassRef>urn:oasis:names:tc:SAML:2.0:
               ac:classes:unspecified
            </saml:AuthnContextClassRef>
         </saml:AuthnContext>
      </saml:AuthnStatement>

   </saml:Assertion>
</samlp:Response>
```

If your organization has multiple SAML configurations, the previous sample SAML assertion applies but note these differences in the Recipient.

- The trailing slash after `login` is not required

- The `so` parameter is required and must specify the organization ID

The Recipient would look like this:

```
Recipient="https://acme.force.com/customers/login?so=00DD0000000JsCM"
```

When logging out of a community, external users authorized using SAML for single sign-on are redirected to the `Custom Logout URL`, if one is set in the community's SAML settings. To access the SAML settings, from Setup, enter *`Single Sign-On Settings`* in the Quick Find box, then select **Single Sign-On Settings**.

SEE ALSO:

Example SAML Assertions

Best Practices and Tips for Implementing Single Sign-On

Single Sign-On with SAML on Force.com

Configure Authentication Providers

Internal and external users can access a community through an external authentication provider that supports the OpenID Connect protocol. For example, if you configure Facebook as an external authentication provider, your users log in to Facebook through a link on the community login page. Facebook authenticates the user, allowing them access to the community.

Note: The following information assumes that you are familiar with the use of authentication providers for single sign-on. For more information, see External Authentication Providers.

Internal and External Users

External users are users with Community, Customer Portal, External Identity, or partner portal licenses. Your org's internal users are employees with full Salesforce licensing capabilities.

Your Salesforce developer must update the Apex `createUser(portalId, userData)` registration handler method to account for both internal and external user creation during OpenID Connect SSO to communities. For example, the developer can use a unique attribute in the `userData` object to determine whether the newly created user is internal or external. For detailed information, see RegistrationHandler Interface in the *Apex Developer Guide*.

The remaining processes of creating external users, configuring the service provider website, and defining the authentication provider in your org remain the same.

Visualforce Login Page

If you're using a custom Visualforce login page instead of the default login page, use the `Single Sign-On Initialization URL` as the target URL of a custom login button. You can locate this URL on the Auth. Provider detail page.

For example:
`https://login.salesforce.com/services/auth/sso/`*`orgID`*`/`*`URLsuffix`*`?community=https://acme.force.com/support`

Janrain

If you're using Janrain as the authentication provider, pass the following code string to the Janrain login widget deployed on your site.

```
janrain.settings.tokenUrl='https://login.salesforce.com/services/authcallback/orgID/URLsuffix'
+'?flowtype=sso&community='+encodeURIComponent('https://acme.force.com/customers');
```

SEE ALSO:

- External Authentication Providers
- Use Request Parameters with Client Configuration URLs
- Customize Login, Self-Registration, and Password Management for Your Community

Configure Authentication Flows with OAuth

If your organization wants to build integrations between communities and custom-branded apps, such as mobile or desktop apps, you can use OAuth to create a branded login page.

The following information assumes that you're familiar with OAuth protocols and authentication flows for remote access applications. Communities support all available authentication flows, except for the username-password OAuth authentication flow and the SAML assertion flow. When implementing branded OAuth flows for communities, you configure the authorize URL to use the community URL. The authentication flow then directs users to the application approval page.

Note: When logged in as another user, an admin or support user can't authorize OAuth data access for the user. For example, if an admin logs in as another user, the admin can't authorize OAuth access for third-party applications to user accounts. This restriction includes single sign-on.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For example, to authenticate a user using an authorize URL like the following:

```
https://login.salesforce.com/services/oauth2/authorize?
response_type=token&client_id=your_app_id&redirect_uri=your_redirect_uri
```

Replace the `login.salesforce.com` host name with the full path to the community URL:

```
https://acme.force.com/customers/services/oauth2/authorize?
response_type=token&client_id=your_app_id&redirect_uri=your_redirect_uri
```

When implemented successfully, this URL directs users to the community login page. After they authorize the app, you then set a user access token and refresh token for future authentication. In requests for the token endpoint, replace the host with the community, like this:

```
https://acme.force.com/customers/services/oauth2/token
```

Note: After you acquire the `access_token`, you can pass it as a Bearer token in the Authorization header request. This example shows a REST API call to communities: `https://community.force.com/customers/services/data/v32.0/ -H "Authorization: Bearer`

```
00D50000000IehZ\!AQcAQH0dMHZfz972Szmpkb58urFRkgeBGsxL_QJWwYMfAbUeeG7c1E6
LYUfiDUkWe6H34r1AAwOR8B8fLEz6n04NPGRrq0FM"
```

SEE ALSO:

- Authenticate Apps with OAuth
- Digging Deeper into OAuth 2.0 in Salesforce
- Using OAuth to Authorize External Applications
- "Step Three: Connect to Chatter REST API Using OAuth" in the Chatter REST API Developer Guide

Verify Email Addresses with Async Email

Send email messages to internal and external users to ensure they're registered with a valid email address that they own. Async email messages contain a verification link (URL). Users simply click the link to verify their email address. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. Use the Apex method `asyncEmailConfirmation` to send a verification link in an email message.

   Here's an example.

```
System.UserManagement.sendAsyncEmailConfirmation('005RM000001a0Ox', '00XRM000000hxnG',
 '0DBRM000000015i', '/s/contactsupport');
```

2. Optional. Customize the async email template.
   a. From Setup, enter *Email Templates* in the Quick Find box, and then select **Classic Email Templates**.
   b. Next to Communities: User Verification Email, click **Edit**.
   c. To personalize your email content, edit the text in the email body. Use the available merge fields listed at the top of the page.

      To find verification-specific fields, select **Network Member Fields** as the field type.

3. Optional. For more flexibility, create a custom async email message that includes a verification link.

   To insert a verification link, use the `$Network AsyncVerificationLink` field.

4. Optional. Create a list view that tracks certain verification fields, such as whether users have verified their email addresses and phone numbers.
   a. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
   b. Click **Create New View** and select these verification-specific fields.

- Admin Trusted Mobile Number
- One-Time Password App
- Salesforce Authenticator
- Temporary Code
- U2F Security Key
- User Verified Email
- User Verified Mobile Number

Encrypt Community Data

You can add a measure of security to your community by encrypting files, attachments, and many popular data fields.

Note: Beginning with Spring '17, Shield Platform Encryption no longer masks encrypted data in the presentation layer. This may affect some users' ability to work with encrypted data. If you have data you don't want specific users to see, revisit their field-level security settings, record access settings, and object permissions.

Keep the following things in mind:

- You can encrypt data in communities, but not in portals.
- If you are using Classic Encryption, data in encrypted custom fields is still masked.
- Your community's specific settings for personally identifiable information (PII) apply regardless of whether data is encrypted.
- Data encryption doesn't change anything about the community user experience. However, encrypting the Account Name field has an effect on how users' roles are displayed to admins. Normally, a community user's role name is displayed as a combination of their account name and the name of their user profile. When you encrypt the Account Name field, the account ID is displayed instead of the account name.

  For example, when the Account Name field is not encrypted, a user belonging to the Acme account with the Customer User profile would have a role called `Acme Customer User`. When Account Name is encrypted, the role is displayed as something like `001D000000IRt53 Customer User`.

SEE ALSO:

Strengthen Your Data's Security with Shield Platform Encryption

Content Security Policy in Lightning Communities

Lightning communities use Content Security Policy (CSP), a W3C standard that controls the source of content that can be loaded on your community's pages. CSP helps protect against cross-site scripting (XSS) attacks. With two different levels of security, you can optimize your site design choices and level of risk.

What Is CSP?

CSP is a list of rules that define the "Content-Security-Policy" HTTP header that is sent to the browser when someone visits your community. Web browsers use these rules to help block requests to unknown servers for different kinds of resources (scripts, images, and other data). Strict CSP makes your community the most secure against these kinds of attacks by preventing requests to all other servers, unless explicitly approved, or *whitelisted*.

CSP is about what is part of your site and what isn't. One of the most important aspects about CSP is how it defines the boundaries of your community. Anything not loaded through your community's domain name, such as a logo hosted on a separate company site, is considered a third-party host.

This approach to CSP follows the *same-origin policy* that browsers already enforce. You can access third-party hosted materials, but you must first choose a security level for your site. Then, whitelist the hosts as appropriate.

Tip: Including Salesforce hosted data and files doesn't cause CSP alerts. Salesforce is technically a third-party host for your community, but we automatically whitelist those addresses.

You can choose from two security levels.

Script Security Level	Description
Strict CSP: Block Inline Scripts and Script Access to All Third-party Hosts	Recommended—provides maximum security. • Blocks all inline scripts from running in your site • Allows non-script resources, such as images, from approved third-party hosts to display
Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts	Provides moderate security. • Blocks script hosts that are not explicitly whitelisted • Allows non-script resources, such as images, from approved third-party hosts to display

What Does CSP Affect?

Whether you're an administrator, content manager, or developer, be aware of CSP and the impact it has on the pages of your community.

Web browsers use CSP rules to help mitigate many kinds of cross-site scripting (XSS) attacks by blocking requests to unknown servers for different kinds of resources (scripts, images, and other data). Strict CSP makes your community the most secure against these kinds of attacks by preventing requests to all other servers, unless they've been explicitly whitelisted. CSP can affect any aspect of your site that can have calls to external sources such as Rich Text and HTML components, `<head>` declarations, custom Lightning components, or CMS Connect content.

Let's look at a couple of examples.

Example: You decide to host your company logo on an external host rather than uploading it in the Themes panel in Community Builder or using a static resource. If your community is running Strict CSP, it prevents the community from loading all third-party data, including images, on the page. To allow the logo to load, you must add the host to the CSP Trusted Sites in your Salesforce org settings.

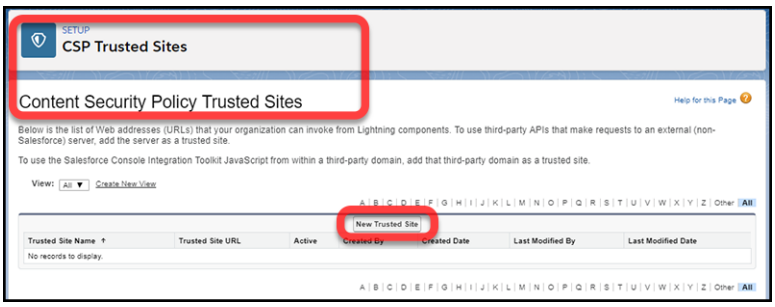
Example: You pull in the posts from your company blog using CMS Connect. Because this references an external host, whitelist that host when running CSP so your content displays. You can also whitelist hosts that the external content accesses so scripts and images work.

Where Do I Whitelist Hosts?

Where you whitelist hosts depends on the kind of resource you're calling. Some of the settings are shared with Lightning Experience across your entire org, while some are specific to each community.

For non-script resources hosted outside your community, such as a logo or style sheet stored on a corporate site, whitelist the host in CSP Trusted Sites in your Salesforce org settings. Unsure whether you fall into this category? If your `<head>` markup, or any content

or code in your community (including custom components), uses a `src` attribute defined by `https://any.otherdomain.com` or `wss://any.otherdomain.com`, you're using non-script resources that must be whitelisted.

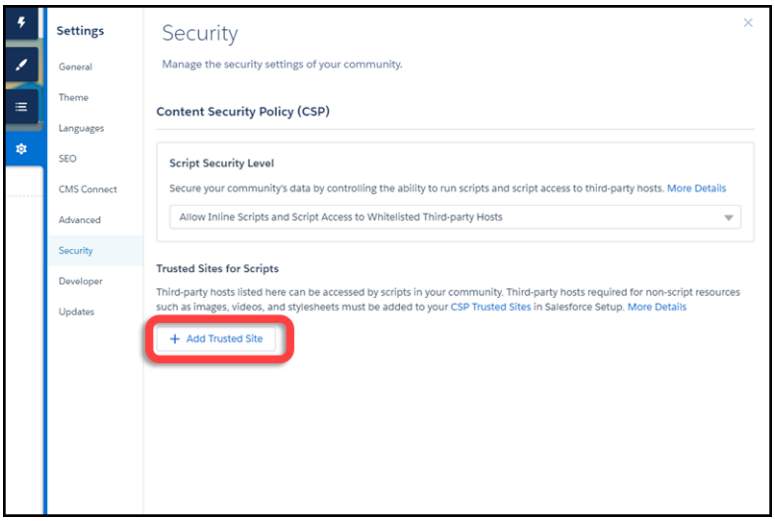


Note: CSP Trusted Sites in your org settings supports the following directives for trusted sites in Lightning Experience and Lightning Communities. CSP directives allow more control around how specific kinds of resources are loaded.

- `connect-src`
- `frame-src`
- `img-src`
- `style-src`
- `font-src`
- `media-src`

Unsure whether you fall into this category? If your `<head>` markup, or any content or code in your community (including custom components), uses a `src` attribute defined by `https://any.otherdomain.com` or `wss://any.otherdomain.com`, you're using non-script resources that must be whitelisted.

For script resources, such as JavaScript, whitelist the hosts in **Security** > **Settings** in Community Builder. The **Add Trusted Sites** button appears when you select the **Allow...Access to Whitelisted Third-party Hosts** security level. If you change to Strict CSP, these whitelisted sites remain, which allows you to switch selections easily.



Note: Communities allow `unsafe-inline` and `unsafe-eval`, when not using strict CSP, to support common services such as Google Tag Manager.

What Do I Need to Do and When?

To make sure that your community works as expected, the "Allow Inline Scripts and Script Access to Any Third-party Host" setting maintains the same security level as before Winter '19.

However, in Spring '19 (February 2019), Strict CSP becomes the standard CSP setting for all *new* communities. And in Winter '20 (October 2019), the current default setting is being removed for existing communities. Consider the level of security your community requires, and decide when to take the required steps.

Note: We recommend using Chrome to develop your site because we added extra error guidance when viewing your site. After you set the CSP security level for your community, test it in other browsers to make sure that your customers have a good experience.

IN THIS SECTION:

Select a Script Security Level

Choose a script security level to control whether scripts can be executed from your community.

Content Security Policy Tips and Best Practices

While choosing a setting for your Content Security Policy (CSP) is easy, the impact can be far ranging and unexpected. We've collected up some tips and guidance to avoid surprises.

SEE ALSO:

Developer Documentation: Content Security Policy Overview

Static Resources

Create CSP Trusted Sites to Access Third-Party APIs

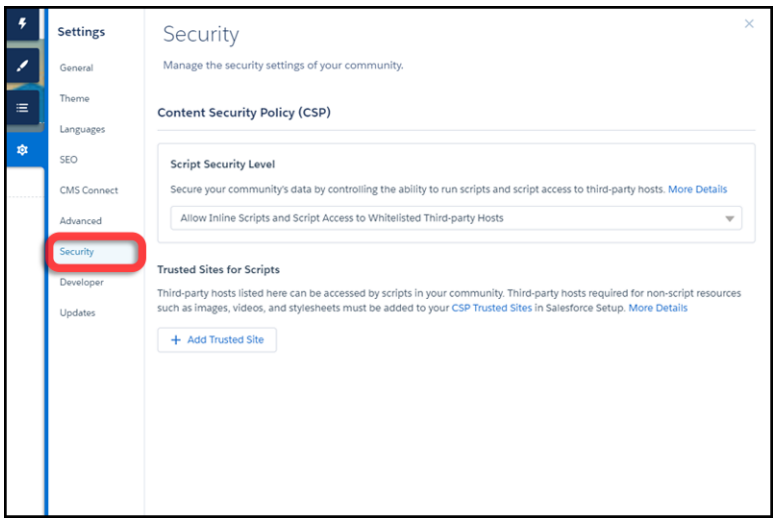
Developer Documentation: CspTrustedSite

Select a Script Security Level

Choose a script security level to control whether scripts can be executed from your community.

Selecting a script security level depends on your needs and tolerance for risk. We recommend running Strict CSP for optimum security. You can easily switch between levels to test how different security levels affect your customers' experience.

1. Open **Settings** > **Security** in Community Builder.



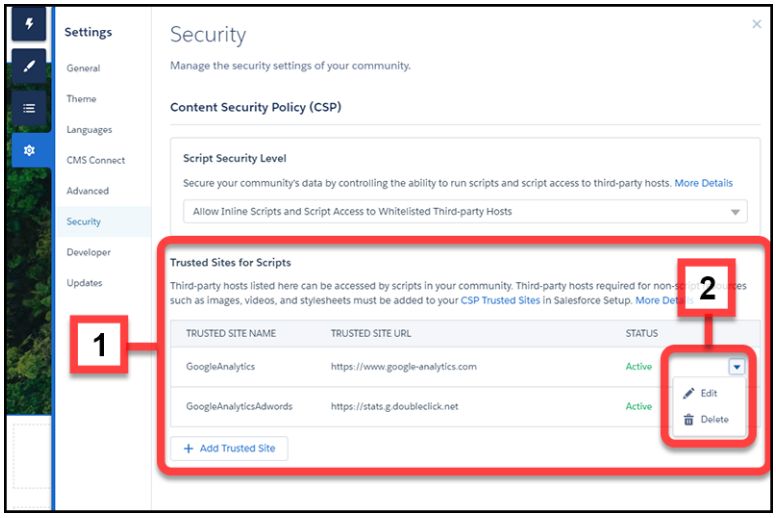
2. Select a script security level.

Script Security Level	Description
Strict CSP: Block Inline Scripts and Script Access to All Third-party Hosts	Recommended—provides maximum security. • Blocks all inline scripts from running in your site • Allows non-script resources, such as images, from approved third-party hosts to display
Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts	Provides moderate security. • Blocks script hosts that are not explicitly whitelisted • Allows non-script resources, such as images, from approved third-party hosts to display

Note: In the Spring '19 release, Strict CSP is the default security level for new communities. We recommend that you review and adjust your site to run with this security level now to avoid future challenges. However, selecting a more relaxed script security level is still an option.

3. If you selected **Allow...Access to Whitelisted Third-party Hosts**, whitelist any third-party hosts by clicking **Add Trusted Sites**. Enter a friendly name and the host address, and click **Add Site**.
After you add a site, it appears in the Trusted Sites for Scripts section (1), where you can edit or delete it (2).

Note: Activate or deactivate trusted sites in the edit screen. You can turn them on or off without having to remove them from your site configuration for easy testing or maintenance.



Note: Whitelisted sites are specific to a community. To use them in other communities, you must whitelist them separately.

4. If you use non-script resources hosted elsewhere, such as images or style sheets, add those sites to CSP Trusted Sites. In Setup, search for *CSP* and click **CSP Trusted Sites**.

Hosts whitelisted in CSP Trusted Sites are available to Lightning Experience, Communities, or All, depending on the context you apply. If available to Communities, that host is whitelisted for all communities in your org.

5. For changes to the script security level to take effect, publish your community.

SEE ALSO:

- Create CSP Trusted Sites to Access Third-Party APIs
- *Developer Documentation:* CspTrustedSite
- Enable Google Analytics™ for Your Community

Content Security Policy Tips and Best Practices

While choosing a setting for your Content Security Policy (CSP) is easy, the impact can be far ranging and unexpected. We've collected up some tips and guidance to avoid surprises.

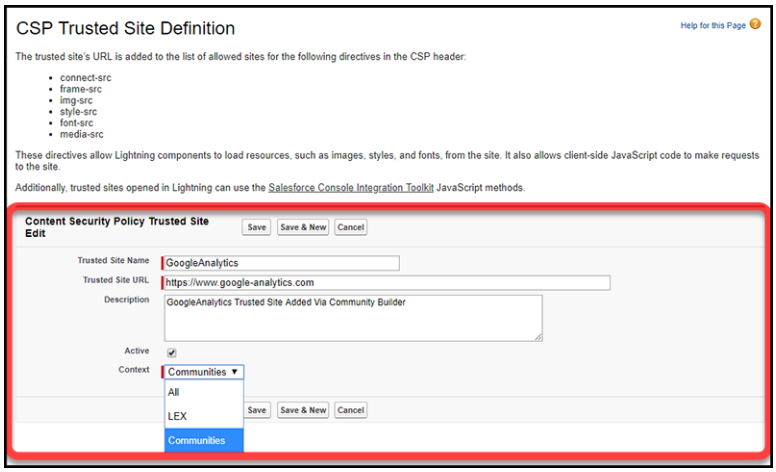
In addition to error messages and feedback, you can use the developer console in your browser to help identify any directive issues or CSP violations.

If you use Google Analytics in your community, we automatically add the following sites to your org's CSP Trusted Sites in Setup:

- `https://www.google-analytics.com`
- `https://stats.g.doubleclick.net`

This ensures that both Analytics and the AdWords features can function.

Note: These sites are listed in CSP Trusted Sites in with a context of Communities. The directive is only supported in the policy for Communities, and only on a per community basis. These sites are listed only once in CSP Trusted Sites regardless of how many communities have Google Analytics enabled.



SEE ALSO:

Enable Google Analytics™ for Your Community

Secure Your Community or Portal

Communities and portals help you connect with customers and partners. When building your community or portal, you can use various settings and permissions to protect your data and your customers' data. Keeping your data secure is a joint effort between you and Salesforce.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

IN THIS SECTION:

Give Secure Access to Unauthenticated Users with the Guest User Profile

Public communities lend themselves well to business-to-consumer (B2C) type scenarios and help you to reach a broader audience. You can use a guest user profile to control public access to data, content, and objects in your community that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

SEO Best Practices and Considerations for Guest Users

To help end users discover publicly accessible content in your community through search engines, Salesforce provides you with several tools for search engine optimization (SEO). For Lightning communities, Salesforce generates a sitemap with a list of the publicly accessible pages based on the data that you made available to guest users through Community Builder and object access on the guest user profile. For communities built with Salesforce Tabs +Visualforce, customers are responsible for creating the sitemap and indicating which pages are included.

Community User Visibility Best Practices for Guest Users

Community and guest users often need to see one another in a public setting, especially when you implement a public forum, such as a self-service community, or build a public-facing app, such as ideas. Keep these guest user visibility best practices and considerations in mind when setting up your public-facing forum or site.

Control Public Access to Your Lightning Community with Community Builder

Set the public access level to your Lightning community, and set page-specific access to your community pages.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

Test Guest User Access in Your Community or Portal

After you've implemented the recommended security settings, take your community or portal on a test drive to see what guest users see.

Give Secure Access to Unauthenticated Users with the Guest User Profile

Public communities lend themselves well to business-to-consumer (B2C) type scenarios and help you to reach a broader audience. You can use a guest user profile to control public access to data, content, and objects in your community that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

Check out this video to learn more about how guest user profiles work: Open Up Access to Your Community or Portal with the Guest User Profile.

When you create a community, Salesforce creates a profile, a user record, and sharing mechanisms that are available only to guest users, regardless of whether the community is configured for public access. Each public community or portal uses this guest user profile and record to let unauthenticated users browse the site. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

For instance, let's say you have three communities or portals set up in your Salesforce org. Each community or portal has its own guest user profile and guest user record.

Here's how it works.

- Community 1 —> Guest User Profile 1 —> Community 1 Site Guest User
- Community 2 —> Guest User Profile 2 —> Community 2 Site Guest User
- Community 3 —> Guest User Profile 3 —> Community 3 Site Guest User

A guest user has access to certain pages in your community as long as the community is active in your org. For example, guest users can always see login and login error pages in your community.

To secure your community for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable public access to community content:

- Create and Set Up Communities

  AND

  Is a member of the community

IN THIS SECTION:

Configure the Guest User Profile

Before publishing your community with public access enabled, configure the guest user profile so that your customers can view and interact with your community without logging in.

Configure the Site Guest User Record

Each time a community or portal is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile. It works like other user records in Salesforce, so you can add it to assignment rules, queues, public groups, manual sharing, and permission sets.

SEE ALSO:

Enable Optional Community Features

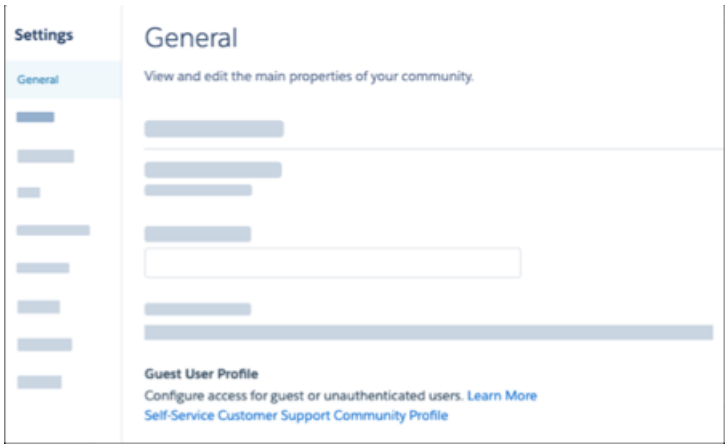
Methods Available to Communities Guest Users

Configure the Guest User Profile

Before publishing your community with public access enabled, configure the guest user profile so that your customers can view and interact with your community without logging in.

For Lightning communities, access the guest user profile from Community Builder.

1. In Salesforce Setup, enter `communities` in the Quick Find box and select **All Communities**.
2. Next to the community that you want to access, click **Builder**.
3. In Community Builder, click the Settings icon and select **General**.
4. Under Guest User Profile, click the profile name.



5. Click **Edit**.
6. Scroll to the Standard Object Permissions section, and change the object permissions to meet your business needs.
7. Click **Save**.

For Salesforce Tabs + Visualforce communities, access the guest user profile from Community Workspaces.

1. In Salesforce Setup, enter `communities` in the Quick Find box and select **All Communities**.
2. Next to the community that you want to access, click **Workspaces**.
3. Select **Administration** > **Pages** > **Go to Force.com**.
4. Click **Public Access Settings** and change the access levels based on your needs.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces:

- Create and Set Up Communities

  AND

  Is a member of the community

To edit app and system permissions in profiles:

- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:

- Manage Profiles and Permission Sets

  AND

  Customize Application

IN THIS SECTION:

Best Practices and Considerations When Configuring the Guest User Profile
When configuring the guest user profile, keep these best practices and considerations in mind.

Best Practices and Considerations When Configuring the Guest User Profile

When configuring the guest user profile, keep these best practices and considerations in mind.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General Best Practices and Considerations

- The guest user profile is specific to the particular community or portal. Check the guest user profile for each of your communities or portals to ensure data security.
- As long as the community is active, guest users can access a subset of community pages, such as login and error pages.

Sharing Settings

External org-wide defaults control which objects external users, including guest users, can see and what their base level of access is.

- Review your organization-wide defaults, and ensure that External Org-Wide Defaults are enabled.
- Set all external org-wide defaults to their most restrictive setting, preferably **Private**.
- Review the external org-wide defaults that are set to **Controlled by Parent**, and make sure that the parent sharing settings are set to **Private**.
- Securing external sharing settings starts with securing internal sharing settings. To ensure that guest users access only what they need, review your data sharing model.

Object Settings

- Review all default object permissions in the guest user profile, and apply the most restrictive permissions for the guest user. For almost all objects, we recommend that the guest user has no access. If your business case calls for object data to be exposed to the guest user, set a maximum Read permission where possible.
- When guest users create records, such as cases via web-to-case or other records created via flows, the site guest user is the record owner. If the record owner isn't changed, anyone who has guest access to your community or portal can see the record.
- Never assign the View All or Modify All permission to guest users.
- Never assign update or delete permissions to guest users.

System Permissions

- Review all system permissions, and deselect the permissions that aren't necessary for your use case.
- Disable the View All Users permission if you don't want guest users to see other community users.

  Note: When you deselect View All Users, guest users no longer have access to user or topic feeds in a community.

- Disable the Run Flows permission if guest users aren't using flows. If guest users need flow access, disable the pause option on flows that guest users are accessing.

API Usage

The API Enabled permission in system permissions lets external applications or connectors use the API to authenticate or access Salesforce data. Some examples of API usage are Workbench, Dataloader.io, Jitterbit, Excel Connector, the Salesforce app, Mobile SDK apps, Salesforce IoT, and connected apps.

- Check if the API Enabled permission is enabled for the guest user profile.
- Salesforce strongly recommends that you disable the API Enabled permission unless guest users explicitly need API access.
- Disable the permission in a sandbox first to see how guest user access is affected.

Visualforce Page and Apex

- Review all whitelisted Visualforce and Apex pages. Remove pages that you don't want guest users to access.
- The following Salesforce-provided Visualforce pages are added by default to the guest user profile to provide common services, such as authentication flows or site maintenance.
  - BandwidthExceeded
  - CommunitiesLanding
  - CommunitiesLogin
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - CommunitiesTemplate
  - Exception
  - FileNotFound
  - ForgotPassword
  - ForgotPasswordConfirm
  - InMaintenance
  - SiteLogin
  - SiteRegister
  - SiteRegisterConfirm
  - UnderConstruction
- If your site doesn't offer self-registration, remove these self-registration pages from your guest profile:
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - SiteRegister
  - SiteRegisterConfirm
- Remove all other Visualforce pages unless they're needed to support specific business processes (ISV app, custom app).
- Restrict Apex classes for guest users. Allow Apex class access only for REST or SOAP API use. Apex classes that serve as Visualforce controllers don't need explicit access.
- In Apex class and subclass code, look for record updates or queries that don't check field-level security or object permissions or are in "without sharing" classes. Keep Apex and subclass code that runs without sharing or bypasses field-level security and object permissions to a minimum.
- If guest users can execute Aura-enabled Apex controllers, such as a custom Lightning component, always use the "with sharing" keyword.

Data Category Settings

- If you have Classic Knowledge implemented in your org, check data category settings to ensure that guest users can access all the Salesforce Knowledge categories that you want them to.

Field-Level Security

- Review the field-level security of objects that guest users can access to ensure that they have access to the correct fields.
- Remove field-level access to fields that you don't want guest users to see.

Configure the Site Guest User Record

Each time a community or portal is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile. It works like other user records in Salesforce, so you can add it to assignment rules, queues, public groups, manual sharing, and permission sets.

1. In the guest user profile, click **Assigned Users**.
2. In the Full Name column, click the site guest user record link.
3. Make your changes, and click **Save**.

IN THIS SECTION:

Best Practices and Considerations When Working with the Site User Record
Keep these best practices and considerations in mind when configuring the site user record.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Builder:
- Create and Set Up Communities

  AND

  Is a member of the community

To edit app and system permissions in profiles:
- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application

Best Practices and Considerations When Working with the Site User Record

Keep these best practices and considerations in mind when configuring the site user record.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General Best Practices and Considerations

- Enforce authentication where possible, and lock down access to the site guest user.

Record Ownership

- The site guest user must never own records.
- When a guest user creates a record, such as a case via web-to-case or a record created via a flow, the site guest user is the record owner. If the record owner isn't changed, anyone who has guest access to your community or portal can see the record. To remove the site guest user as the owner's record:
  - Set up your processes, flows, and Apex triggers to automatically change the record owner to a user or queue within your org.
  - For cases and leads, set up an assignment rule to change the record owner to a user or queue in your org.
  - Depending on your use case, you could set up one queue or several queues, for example, one queue for leads and another for cases.
- In some use cases, you might need to give Read access to guest users to newly created records (such as ideas created by guest users in a community).
  - Create a public group that includes only a community's guest user (one guest user per public group).
  - Create a criteria-based sharing rule on the object, and assign the rule to the public group previously created.

Sharing Settings

Important: External org-wide defaults apply to guest users and authenticated users in a community or portal.

- Review your external org-wide defaults on all standard and custom objects and keep them private if possible.
- Set external org-wide defaults to private, and open up access with sharing rules.
  - Create one public group, and add the site guest user (repeat for each site guest user record).
  - Create a criteria-based sharing rule and assign it to the public group associated to the guest user.
- Never share data with guest users with owner-based sharing rules.
- Never add the site guest user to queues. If a guest user is part of a queue, you could accidentally grant visibility into records owned by the queue.
- Never add guest users to a public group other than one created for the sole purpose of driving guest user record visibility.
- Create a trigger or process that disables manual sharing for guest users.

SEO Best Practices and Considerations for Guest Users

To help end users discover publicly accessible content in your community through search engines, Salesforce provides you with several tools for search engine optimization (SEO). For Lightning communities, Salesforce generates a sitemap with a list of the publicly accessible pages based on the data that you made available to guest users through Community Builder and object access on the guest user profile. For communities built with Salesforce Tabs +Visualforce, customers are responsible for creating the sitemap and indicating which pages are included.

Lightning Communities

- To control which objects are included in your sitemap, whenever possible use generic object pages rather than creating specific object pages.
- Use Community Builder to review which objects and records are available to the guest user profile and therefore included in your sitemap.
- Use robots.txt for more control over which data is available for search engines to index when they crawl your community.

- Submit your sitemap to search engines, such as Google Search Console, only after completing the previous steps.

Salesforce Tabs + Visualforce Communities

- In your sitemap, include only publicly accessible Visualforce pages and objects that you want discoverable by search engines.
- Use robots.txt for more control over which data is available for search engines to index when they crawl your community.
- Submit your sitemap to search engines, such as Google Search Console, only after completing the previous steps.

Note:

- The generation of your sitemap.xml file is limited to production environments. The file isn't created in sandbox.
- All standard and object pages that require authentication as part of a publicly accessible community aren't included in the sitemap file and therefore aren't exposed to search engines for indexing.

SEE ALSO:

Create a Custom robots.txt File for Your Community

Best Practices for Using SEO in Your Community

Community User Visibility Best Practices for Guest Users

Community and guest users often need to see one another in a public setting, especially when you implement a public forum, such as a self-service community, or build a public-facing app, such as ideas. Keep these guest user visibility best practices and considerations in mind when setting up your public-facing forum or site.

- Protect the identity of your most active users by hiding the Knowledgeable Users and Reputation Leaderboard components using audience targeting in Community Builder.
- Never use the View All Users permission to give guest users visibility to other users.
- The Community User Visibility setting in Sharing Settings is org-wide. Never use this setting to grant visibility to other users.
- To give user visibility to community users, enable **See other members of this community** on a community-by-community basis.
- If your community or forum needs to remain private, don't use the Community User Visibility setting. This setting shows authenticated users to guest users. Instead, use sharing rules or sharing sets on the user record to open up user visibility where needed.
- Consider using nicknames to protect the identity of your community members.
- Review the user profile page layout, and restrict exposed fields to a minimum.

Control Public Access to Your Lightning Community with Community Builder

Set the public access level to your Lightning community, and set page-specific access to your community pages.

If you allow public access, your community pages are accessible to the public, including unlicensed users. If don't allow public access, members must log in to access the community.

1. To enable public access in a Lightning Community, open Community Builder.
   - From the All Communities page in Setup, click **Builder** next to the community name.
   - From a community, click **Community Builder** in the profile menu.
2. Click **Settings**.
3. Select **Public can access the community**.

EDITIONS

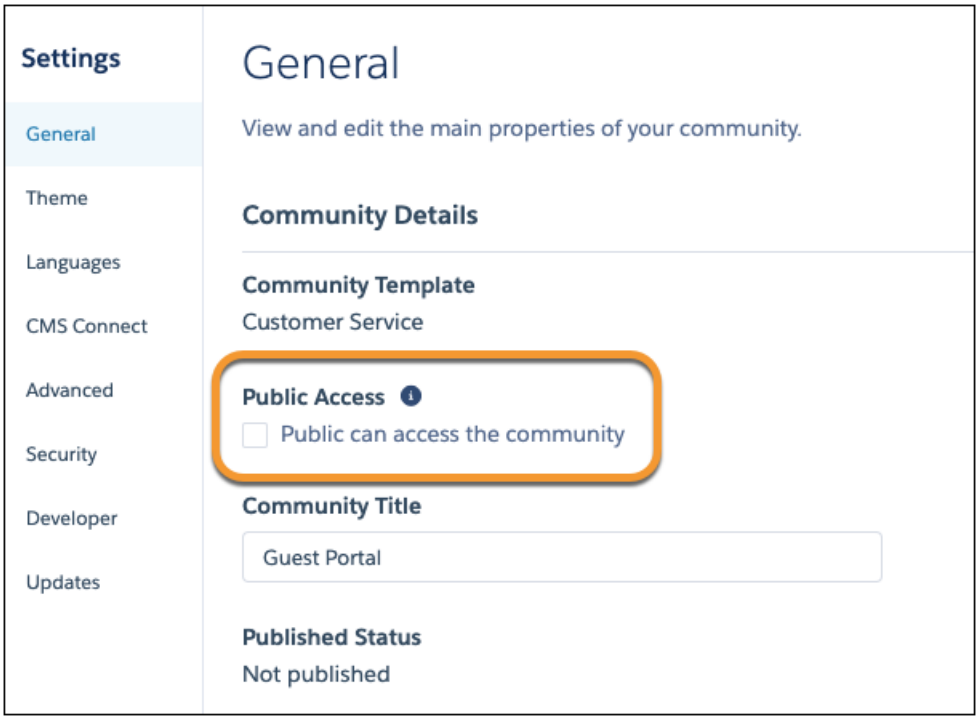
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



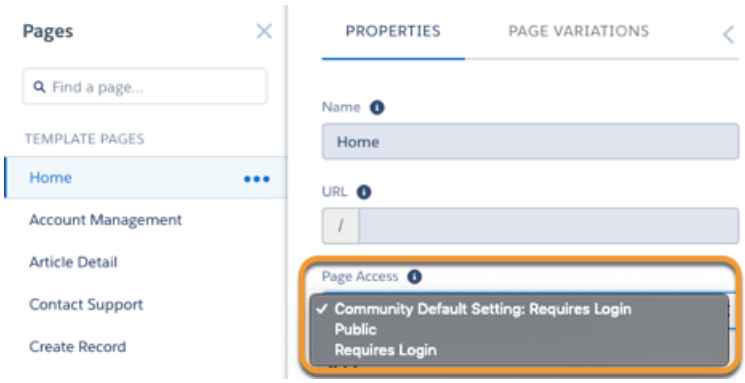
You can also set page-level access to specific Lightning community or portal pages in Page Properties.

Community Default Setting
Reflects your choice for public access under General Settings.

Public
Makes the page public regardless of the community's default setting.

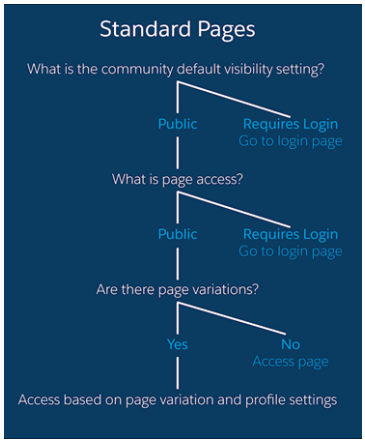
Requires Login

Makes the page private and requires members to log in, regardless of the community's default setting.

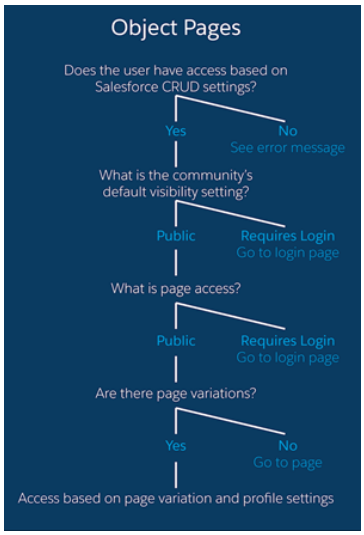


How do these settings work with audience criteria-based page visibility in Community Builder? When a member is trying to access a page, Salesforce first checks the community's default setting. Is it public or does it require users to log in? Then Salesforce looks at the page access. When that's cleared, Salesforce checks that the audience criteria-based visibility that you set in Page Variations.

How does this logic work for standard pages?



And what's the logic behind pages that show object data?



You can also set privacy settings for some components, such as the Tabs and the Navigation Menu components. To make a component on a public page visible to guest users, select **Publicly available** in the component's properties.

Important:

- Regardless of the settings, some pages are always public, and others are always private. Public pages include login-related pages (Login, Register, Forgot Password, Login Error, Check Password). The Messages page for direct messages is always private.
- If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public pages** preference is enabled in **Administration** > **Preferences** in Community Workspaces or Community Management. This preference lets guest users view asset files shared with the community on publicly accessible pages. It remains enabled as long as the page has public access enabled.

IN THIS SECTION:

Best Practices and Considerations for Page-Level Access in Community Builder

Community Builder is a powerful tool for keeping your Lightning community or portal secure. Keep these best practices and considerations in mind when working with access levels in Lightning communities.

Lightning Communities Search Best Practices and Considerations for Guest Users

When setting up your search pages and components for communities and portals, keep these best practices and considerations in mind to keep data secure from guest users.

Set Up Web-to-Case for Guest Users

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in.

Best Practices and Considerations for Page-Level Access in Community Builder

Community Builder is a powerful tool for keeping your Lightning community or portal secure. Keep these best practices and considerations in mind when working with access levels in Lightning communities.

- Don't create object pages for objects that aren't exposed to external users. If you have object pages that aren't being used, delete them.
- Use generic record pages when possible.
- If you set up object pages for authenticated users, test the pages to ensure that guest users can't see them.

Lightning Communities Search Best Practices and Considerations for Guest Users

When setting up your search pages and components for communities and portals, keep these best practices and considerations in mind to keep data secure from guest users.

Search Page

- Review page access settings for the search page to ensure that you want the search page accessed by guest users.
- To limit access to the search page, consider creating a search page variation with a guest audience.

Global Search Results Component

The Global Search Results component is the main component on the Search page in any community. The component allows admins to select the objects shown in search results.

- Guest users only see results on objects they have access to.
- Actual record access for the guest user isn't limited to the objects the admin configures in the Global Search Results component. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure that the guest user doesn't have access to your org's sensitive data.

Search Box Component

- As with the Global Search Results component, the admin sets up which objects to show in searches. However, record access for the guest user isn't limited to the objects the admin configures in the Global Search Box and Global Search for Peer-to-Peer Communities components. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure the guest user doesn't have access to your org's sensitive data.

Set Up Web-to-Case for Guest Users

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in.

To let guest users create cases, first create a case page layout for unauthenticated users. This allows you to capture and create basic information that would already be associated with a registered user.

Tip: Assign case field-level security and guest user actions appropriately so guest users have access to what they need but can't see your company private information.

1. From Setup, enter *Web-to-Case* in the Quick Find box, then select **Web-to-Case**.
2. Select **Enable Web-to-Case**.
3. To ensure that guest users can log cases through contact support, from Setup, enter *Communities* in the Quick Find box, then select **All Communities**.
4. Select **Builder** next to the community you want your guest users to log cases via contact support.
5. Click the drop-down arrow next to your community name and select **Community Management**.
6. On the left-hand panel, click **Administration**.
7. Click **Pages**.
8. Click **Go to Force.com**.

9. On the Sites Detail page, click **Edit**.
10. Enable **Guest Access to the Support API**.
11. Add **NewCase**, or a custom quick action to add cases, to the Selected Quick Actions.
12. Click **Save**.

Note: When using a self-service template, it's unnecessary to set up the other options on the Web-to-Case Settings page.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

IN THIS SECTION:

Chatter and Discussions Best Practices and Considerations for Guest Users

Turning on Chatter for communities and portals enables discussions among your portal and community users. Keep these best practices and considerations in mind when you're setting up Chatter and discussions.

Files Best Practices and Considerations for Guest Users

To view a file on a record, community users need access to the record, and record file visibility must allow community users. Files shared with users, Chatter groups, and topics follow the same sharing model as the objects that the files are shared on. Files in Libraries can be exposed to community users, but the community user must be added as a member of the library.

Chatter and Discussions Best Practices and Considerations for Guest Users

Turning on Chatter for communities and portals enables discussions among your portal and community users. Keep these best practices and considerations in mind when you're setting up Chatter and discussions.

General Best Practices

- Check System Permissions in the guest user profile to assign or remove Chatter-specific permissions to guest users.

Groups

- Give only internal and trusted members the ability to create groups. Consider a group creation workflow with an approval process.
- Keep the number of groups to a minimum, and audit your community's groups on a regular basis.
- Keep groups private whenever possible.
- Consider a process on who can manage groups.
- Review the content in the group detail page to make sure it meets your community's content standards.
- Review files that are publicly accessible and associated to groups to make sure that they meet your community's content standards.

User-Generated Content

- Set up moderation rules for all content created by users.

Topics

- Enforce a minimum access policy for topics.

- Never assign guest users Create Topics or Assign Topics user permissions.
- Carefully choose who can create topics in a community.
- Deselect **Suggest topics in new communities posts** in **Community Workspaces** > **Administration**.

Enabling API Access to Chatter for Guest Users

The following Lightning and Visualforce pages and components in communities need access to underlying Chatter capabilities to load correctly for guest users. Enabling public access through the guest user profile and the API exposes data for guest users through Chatter in Apex, which is helpful when you're building your own community pages from scratch.

- Case
- Featured Feeds
- Feed
- Group
- Group Detail
- Headline
- Record Information Tabs
- Related Lists
- Reputation
- Search & Post Publisher

To enable access to Chatter functionality, access Community Workspaces or Community Management.

1. Select **Administration** > **Preferences**.
2. Select **Give access to public API requests on Chatter**.
3. Click **Save**.

Files Best Practices and Considerations for Guest Users

To view a file on a record, community users need access to the record, and record file visibility must allow community users. Files shared with users, Chatter groups, and topics follow the same sharing model as the objects that the files are shared on. Files in Libraries can be exposed to community users, but the community user must be added as a member of the library.

The logic for sharing files with community users also applies to guest users. If guest users have access to an object, they can have access to files shared with that object if the file visibility allows community users.

Use this community preference to give guest users access to files: Give access to public API requests on Chatter.

- Review permissions for who can create content deliveries and public links to make sure that they align with your business needs.
- Review library membership and permissions to make sure that they meet your business needs.
- You can add both users and public groups as members of a Content Library. Public groups pose a risk of extending access beyond who you want to have access.
  - Review who are library administrators. Admins have the power to add more library members.
  - Don't add a public group to a library unless you know who is in the group and the type of members who will be added in the future.
  - Review which library permissions grant the ability to create content deliveries (the Deliver Content permission).
- Make sure that unintended files aren't public.
  - Query ContentAsset to check for the field isVisibleByExternalUsers.

  - Query documents to check for the field IsPublic.
  - Query StaticResource to check whether the CacheControl field is set to Public.
- Audit file visibility on records.
- Export ContentVersion to get a list of all files in the org. Export ContentDocumentLink to see all the records that the files are shared with and what the file visibility is for the share to the record.

  Note: For each file, you see multiple shares, such as one share to the owner and multiple shares to different records. Some rows, such as a share to the owner could have the visibility set to AllUsers, but this setting doesn't grant access to community users. Only shares to records that have the visibility set to AllUsers mean that community users who have access to that record have access to its related files.

Test Guest User Access in Your Community or Portal

After you've implemented the recommended security settings, take your community or portal on a test drive to see what guest users see.

- Access your community or portal using an incognito window to make sure that you're logged out.
- Browse to each public page to make sure that your guest user has the correct access level.
- Browse to object pages to see what the guest user can see.
- Do a global search in the community for specific records to see a search results page.
- Access the community from a mobile device to see the mobile guest user experience.
- Access direct links to various object detail pages as a guest user to ensure that there's no access.
- Access `[www.domain.com]/[siteprefix]/sitemap.xml` to view what is listed in your community sitemap to guest users. The sitemap.xml shows what information is exposed to search engines.

Plan Your Community Design Strategy

If you chose to use custom pages in your community instead of out-of-box tabs and branding, you need to decide whether to use Community Builder or Lightning Platform. Once you make the decision, use the following sections to help you customize community pages:

- Customize Communities with Community Builder
- Use Visualforce and Salesforce Sites

You can also customize these other areas of your community:

- Add the Global Search Box to Your Customized Community HTML Header on page 76
- Configure a Custom Domain for Your Community
- Rename the Chatter Tab

IN THIS SECTION:

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

When you create a community, you can create a Lightning community or a Salesforce Tabs + Visualforce community. With either option, you can build branded, publicly available pages such as landing or marketing pages, and private custom pages that only community members can access. So which option is the best for you? Well, that depends on your skills and the needs of your organization.

Use Visualforce and Salesforce Sites

Each community has one associated Salesforce Site where you can make advanced customizations to your community.

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

When you create a community, you can create a Lightning community or a Salesforce Tabs + Visualforce community. With either option, you can build branded, publicly available pages such as landing or marketing pages, and private custom pages that only community members can access. So which option is the best for you? Well, that depends on your skills and the needs of your organization.

Lightning Communities

Community Builder is an intuitive, convenient tool for creating and customizing your Lightning community. Create a Lightning community based on a pre-configured template, and then apply branding, edit pages, update your template, and publish changes all from one user-friendly interface. With Lightning communities you can:

- Create the portal or community that is right for you, using the following templates: Customer Service, Partner Central, Customer Account Portal, Build Your Own, and Help Center.
- Enjoy Lightning extensibility including new pages, new navigation items, custom layouts, new components, and access to the AppExchange.
- Design pixel-perfect, branded pages including your own CSS styles. Control the look and feel of the community with a custom theme layout and custom components.
- Create public pages that anyone can access, or add private pages that require users to log in.
- Build and iterate quickly using drag-and-drop reusable page components.
- Use ready-made forms to create web-to-lead forms or gather customer feedback.
- Create data-driven pages, such as product catalogs or other listings, using your organization's data.
- Easily support multilingual experiences through Translation Workbench and Community Builder.
- Reuse your Visualforce pages, actions, buttons, links, and canvas apps in Lightning communities.
- Create and export industry-specific solutions and use them to jump-start new communities, or package and distribute them for others, using Lightning Bolt solutions.

Salesforce Tabs + Visualforce Communities

Suitable for developers with experience using Visualforce, Salesforce Tabs + Visualforce lets you build custom pages and apps with Lightning Platform capabilities, including analytics, workflow and approvals, and programmable logic. If you want to create sites programmatically using Apex and APIs, Salesforce Tabs + Visualforce is the way to go. With Salesforce Tabs + Visualforce communities you can:

- Support high volume authenticated visitors and concurrent transactions while maintaining low page-load times.
- Harness Lightning Platform capabilities including analytics, workflow and approvals, and programmable logic.
- Integrate with partner apps (managed packages) that use Visualforce.
- Use 3rd-party web application frameworks for community rendering.
- Take advantage of dynamic web applications, such as an event management application.
- Create private pages that you can add as a tab within your community.
- Write your own controllers, or extensions to controllers, using Apex code.

- Build dynamic web applications, such as an event management application.

Features at a Glance

Still unsure which product to choose? Use this table to learn more about each product's features.

Feature	Lightning Communities	Salesforce Tabs + Visualforce Communities
Public pages	✓	✓
Pre-configured templates and page layouts	✓	
Authenticated pages	✓	✓
Lightning Bolt Solutions	✓	
Visualforce pages (Add Visualforce pages to Lightning communities using the Visualforce Page component in Community Builder.)	✓	✓
Audience targeting for pages and groups	✓	
Custom themes	✓	✓
Out-of-the-box login, logout, self-registration, and error pages	✓	✓
Drag-and-drop environment	✓	
Lightning components	✓	
IP restrictions	✓	✓
Access to standard and custom objects	✓	✓
Analytics and reports	✓	✓
Page creation using Apex, APIs, and controllers		✓
Workflows	✓	✓
Flows	✓	
Full Lightning Platform capability		✓
Custom objects	✓	✓

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace

your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

SEE ALSO:

Customize Communities with Community Builder
Which Community Template Should I Use?
How Communities Use Lightning
Use Visualforce and Salesforce Sites

Use Visualforce and Salesforce Sites

Each community has one associated Salesforce Site where you can make advanced customizations to your community.

For example, with Salesforce Sites you can:

- Add public pages to your community that don't require login.
- Use branded self-registration and login pages to enable users to register for or log in to your community.
- Customize the provided error pages to reflect your community's branding. You can customize the "Authorization Required (401)" and "Page Not Found (404)" pages.
- Leverage Visualforce pages to create private pages that only community members can access.

For information about using Salesforce Sites, refer to the online help.

Tips and Considerations

- Salesforce Sites pages use the branding styles that you specify in the Create Community wizard. To disable these styles, set the `standardStylesheets` attribute on the `<apex:page>` tag to `false`.
- Consider these limitations when using Salesforce Sites with Communities:
  - Out-of-the-box RSS feeds, analytics tracking, and custom portal profile pages aren't available
  - Custom change-password pages aren't available
  - Login to custom domains is only available with HTTPS
- Because Salesforce Sites are served directly from the Salesforce org, a site's availability is directly related to the org's availability. Your sites are unavailable during your org's maintenance window for major releases. Users who try to access a site see either a Lightning Platform-branded maintenance page or your custom Service Not Available page.
- You can redirect a community home page to its companion Site.com home page. To do so:
  - Set a URL Redirect on the Salesforce Site detail page
  - Set the Source URL to `/`, which represents the home page for the community
  - Set the Target URL to `s`, which represents the home page for the Site.com site

SEE ALSO:

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

Override Default Pages in Your Community with Custom Pages

Use company-branded Community Home and Service Not Available pages by overriding the standard pages in your community.

- Use a Custom Community Home Page
- Use a Custom Page for Service Unavailability

You can override other default community pages in the Site.com or Lightning Platform settings for your community. To do this, open Community Workspaces or Community Management. Next, under Administration, click **Pages** and then click **Go to Lightning Platform** or **Go to Site.com Studio**. Page selections in Community Management or Community Workspaces automatically override any previously specified page selections in the Site.com or Lightning Platform settings.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Use a Custom Page for Service Unavailability

On rare occasions, if your community is not available because of a service outage, Salesforce displays a generic Service Not Available page with Lightning Platform branding. You can replace this page with a custom company-branded static resource page for a personalized user experience for your community members.

The Service Not Available static resource:

- Must be a public .zip file 1 MB or smaller.
- Must contain a page named `maintenance.html` at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

For more information, refer to *Assigning Salesforce Site Error Pages* in the Salesforce Help.

1. Open Community Workspaces or Community Management.
2. Navigate to **Administration** > **Pages**.
3. Click next to **Service Not Available** to search for and select your custom page.
4. Click **Save**.

If there is a service outage at any time, your community displays your selected page. A couple things to keep in mind:

- This page selection doesn't affect communities that use Site.com Studio pages.
- The Service Not Available page, once customized, is available for all communities in the same domain. Depending on the needs of your organization, this might not be desirable. To avoid using the same page for all the communities in your domain, create and assign separate Service Not Available pages for each community.

  For example, consider a scenario where you have two communities in your domain: a customer community (`universaltelco.force.com/customer`) and a partner community (`universaltelco.force.com/partner`). If you use a custom Service Not Available page for only the customer community, then the partner community will display the same page during a service outage, unless you create and assign a separate Service Not Available page to the partner community.

  Domains that have a custom URL with a root path prefix use that site's Service Not Available page for paths on the domain that aren't custom URLs of other sites that have their own Service Not Available pages.

  For example, sites `http://www.example.com/` and `http://www.example.com/site1` have assigned Service Not Available pages. Site `http://www.example.com/site2` does not have an assigned Service Not Available page.

Requests to `http://www.example.com/`, `http://www.example.com/Page1`, and `http://www.example.com/site2` display the Service Not Available page assigned to `http://www.example.com/`.

Requests to `http://www.example.com/site1` and `http://www.example.com/site1/Page1`, display the Service Not Available page assigned to `http://www.example.com/site1`.

If a site does not have an assigned Service Not Available page, and the sites of parent custom URLs in the same domain also don't have assigned Service Not Available pages, the Maintenance page is displayed.

SEE ALSO:

Override Default Pages in Your Community with Custom Pages

Use a Custom Community Home Page

Personalize the standard community home page with company branding by using a custom Site.com Studio or Visualforce page.

The community home page is shown to unauthenticated users in a public community and it allows you to specify a landing page for guest users without setting up redirects. This page is also known as your Active Site Home page.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Pages**.
3. For the Community Home page:
   a. Select the page type: **Community Builder** or **Visualforce**.

      Note: When **Community Builder** is selected, only published Site.com Studio pages are included in the search results.

   b. Enter the name of the page or leave the field blank to get a list of available options.
   c. Click , then click the name of the page in the search results to select it.
4. Click **Save**.

Page selections in Administration automatically override any previously specified page selections in the Site.com or Salesforce Site properties.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

SEE ALSO:

Configure the Default Community Login Page to Use a Custom Home Page

Override Default Pages in Your Community with Custom Pages

Configure the Default Community Login Page to Use a Custom Home Page

If you're using external authentication providers and a custom home page, ensure that users are accessing the correct home page.

To do so, edit the `CommunitiesLandingController` so that it has the correct `startURL` for your community. The `CommunitiesLandingPage` is the Active Site Home Page for your community, meaning that it is shown when someone enters a direct URL to your community. For instance, if your domain is *`universaltelco.force.com`* and your community URL is *`customers`*, the `CommunitiesLandingPage` is shown when someone enters `http://universaltelco.force.com/customers`.

There are 2 methods for using a custom home page:

- Update the `CommunitiesLandingController` code to redirect to the new page:
  1. From Setup, enter *`Apex Classes`* in the `Quick Find` box, then select **Apex Classes**.
  2. Click **Edit** next to `CommunitiesLandingController`.
  3. Replace the code so that it reads:

```
public with sharing class CommunitiesLandingController {
        // Code we will invoke on page load.
    public PageReference forwardToStartPage() {
        String communityUrl = 'https://universaltelcom.force.com';
        String customHomePage = '/apex/hello';
        if (UserInfo.getUserType().equals('Guest')) {
            return new PageReference(communityUrl + '/login?startURL=' +
EncodingUtil.urlEncode(customHomePage, 'UTF-8'));
        }else {
            return Network.communitiesLanding();
        }
      }
        public CommunitiesLandingController() {}
    }
```

  4. Replace *`https://universaltelcom.force.com`* with the URL for your community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Management or Community Workspaces:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To customize administration settings:

- Create and Set Up Communities
- AND is a member of the community

To edit Apex classes:

- Author Apex

5. Click **Save**.

- Alternatively, you can replace the Active Site Home Page with a custom Visualforce page.
  1. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**.
  2. Click the **Manage** button next to the community name.
  3. Click **Administration** > **Pages** > **Go to Lightning Platform**.
  4. In the Site Detail section, click **Edit**.
  5. In the `Active Site Home Page` field, select your custom Visualforce page.
  6. Click **Save**.

When a user enters the community URL, they see the new Active Site Home Page.

SEE ALSO:

Use a Custom Community Home Page

Add Custom Pages That Don't Require Login

Within a community, you can have publicly available pages that are accessible without requiring login, making them ideal for landing or marketing pages.

Communities leverage Salesforce Sites technology to set a custom domain for your organization and a URL prefix for each community created in your organization. If you want to further customize your communities beyond what's available in setup, you can use Salesforce Sites or Site.com to create completely customized pages.

Tip: Communities can have a combination of Visualforce and Site.com pages. By default, the pages you create don't require login, but you can add authenticated pages if needed.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Pages** and then in the Advanced Customizations area, click either:
   - **Go to Lightning Platform** to create pages that don't require login or edit out-of-the-box error pages.
   - **Go to Site.com Studio** to open Site.com Studio, where you can create public, branded pages. (You can also create authenticated pages that require login.)
3. After you create a public page in Site.com Studio, you must publish the Site.com site to allow users to access the page.

For more information about creating pages, refer to these resources:

- Creating Site.com Pages
- Managing Salesforce Site Visualforce Pages
- Manage Salesforce Sites Standard Pages

Which Community Template Should I Use?

Community templates let you build responsive communities for delivering rich, branded spaces for your customers and partners.

With Community Builder, you can edit a Lightning template's components to include information about your community, add images to extend your branding, and include CMS content—without any coding. And if you want a more customized experience, you can create custom pages, add components to pages, build custom Lightning components, and expose more Salesforce objects.

Note: Apart from Salesforce Tabs + Visualforce, all templates are Lightning-based templates that you customize in Community Builder. However, although the Aloha template is Lightning-based, it's used to create an App Launcher, not a community. So when we talk about *Lightning community templates*, we mean all templates except Aloha and Salesforce Tabs + Visualforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customer Account Portal

A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.

Partner Central

A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.

Customer Service

A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.

Help Center

A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.

Build Your Own

Provides the basic pages every community needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your community, customize your branding and themes.

Aloha

A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication, including social logins.

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Allows full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce app.

Keep in mind that Salesforce Tabs + Visualforce isn't a Lighting-based template and therefore doesn't work with Community Builder.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace

your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

IN THIS SECTION:

The Customer Account Portal Template

The Customer Account Portal template improves customer relationships and decreases service costs. The template provides features that make it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

The Partner Central Template

Partner Central is designed to support partner relationship management workflows: channel sales, channel marketing, lead distribution, deal registration, partner recruitment and onboarding. Plus, Partner Central also includes functionality to map reports and dashboards for monitoring your pipeline.

The Customer Service Template

The Customer Service template provides a rich, self-service experience for your customers, where they can get answers to their questions at any time, on any device. With integrated knowledge articles and case management, customers can search for and view articles, post questions to the community, or contact a support agent.

The Build Your Own Template

The Build Your Own template provides the basic pages every community needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your community.

Objects Supported by Out-of-the-Box Components and Pages in Community Templates

Check out the list of all the objects supported by out-of-the-box components and pages in Community Builder-driven templates.

Customer Service Community Setup Checklist

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Customer Service template.

Migrate a Koa or Kokua Template Community to a New Template

The Koa and Kokua templates are in phased retirement, and you can no longer use them to create communities. Salesforce supports existing communities built with Koa and Kokua, but we recommend migrating to newer Lightning community templates. The new Lightning communities provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Which Components Can I Use with Each Template?

Lightning community templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which templates each component can be used in, and when it became available.

SEE ALSO:

Create Communities

Choosing Between Lightning Communities and Salesforce Tabs + Visualforce Communities

The Customer Account Portal Template

The Customer Account Portal template improves customer relationships and decreases service costs. The template provides features that make it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

Included Features

- Lightning community pages and components
- Tile menu, for a visual navigation experience
- Global search with a customizable list of searchable objects
- Dashboards and reports
- Customizable branding and design
- Rich, responsive look and feel across multiple devices

Advanced Features That You Can Configure

- Audience targeting—Deliver custom content to partners by geography, tier, or other criteria.
- Lightning components—Check out the full list of compatible Lightning components that you can use to build out your community.

Included Pages

The Customer Account Portal includes the following pages.

- Home
- Article Detail
- Contact Support
- Create Record
- Error
- Feed Detail
- Messages
- Question Detail
- Search
- Top Articles
- Topic Catalog
- Topic Detail
- User Settings
- Case object pages
- Group object pages
- Dashboard object pages
- Report object pages
- User Profile
- User List
- User Related List
- Generic record pages

- Login pages

The Partner Central Template

Partner Central is designed to support partner relationship management workflows: channel sales, channel marketing, lead distribution, deal registration, partner recruitment and onboarding. Plus, Partner Central also includes functionality to map reports and dashboards for monitoring your pipeline.

What You Get Out-of-the-Box

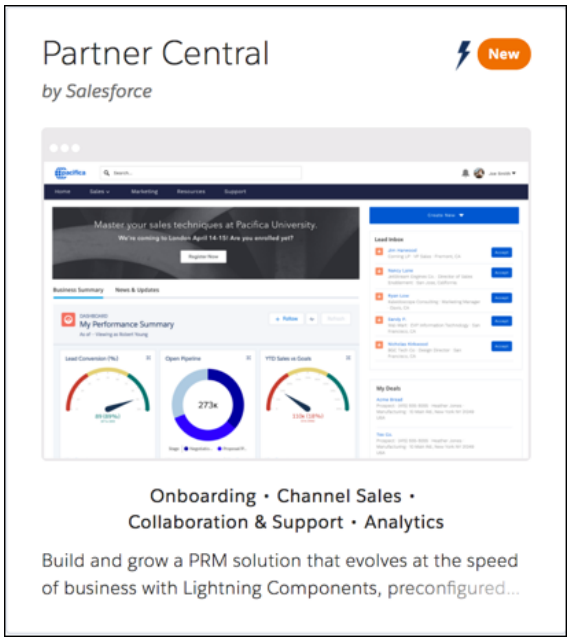
- Guided setup
- Lightning community pages and components
- The Lead Inbox component to pass leads to partners
- Customizable Quick Create action menu that you can configure for deal registration
- Customizable navigation menu with preconfigured list views for leads, deals, and campaigns
- Global search with a customizable list of searchable objects
- Dashboards and reports
- Customizable branding and design
- Collaboration features such as groups, feeds, topics
- Rich, responsive look and feel across multiple devices

Advanced Features You Can Configure for Partner Central

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Wave: Configure Wave reports for your community.
- Google Analytics™: Track community activity with Google Analytics.
- Lightning Components: Check out the full list of compatible Lightning components you can use to build out your community.

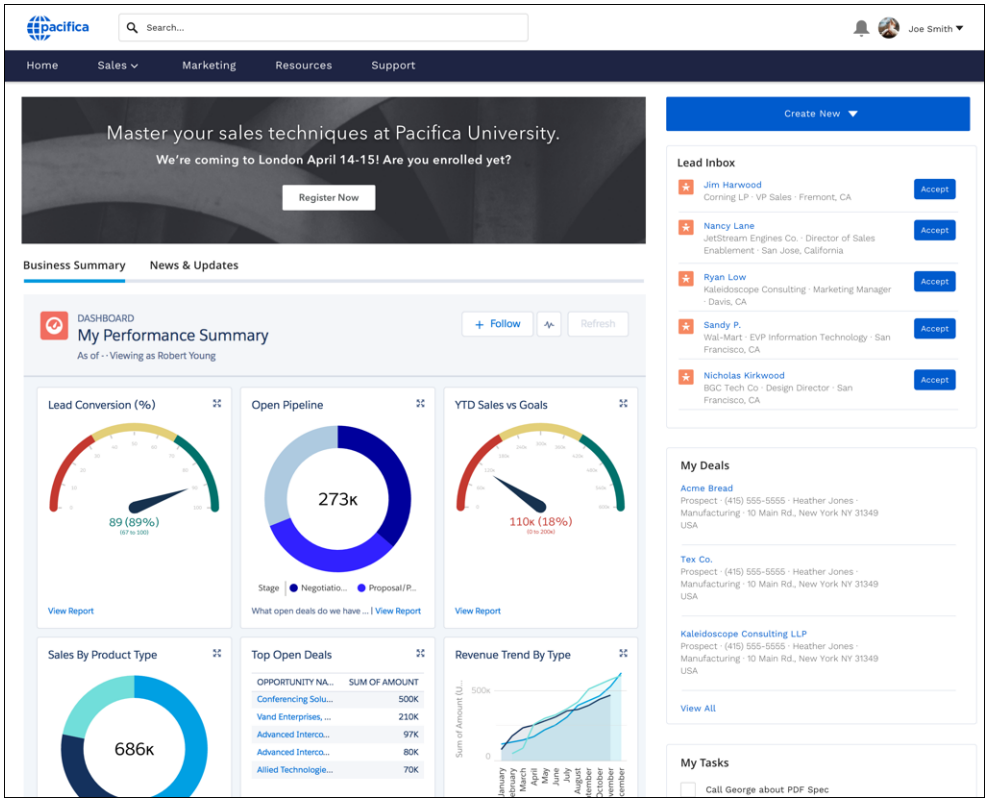
Partner Central in Action

Partner Central in Community Workspaces

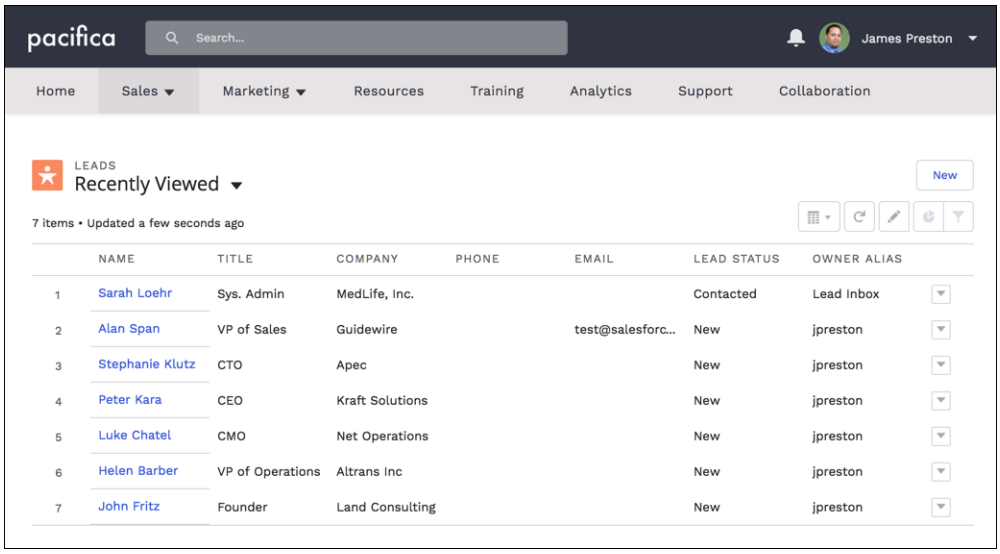


Partner Central Home Page

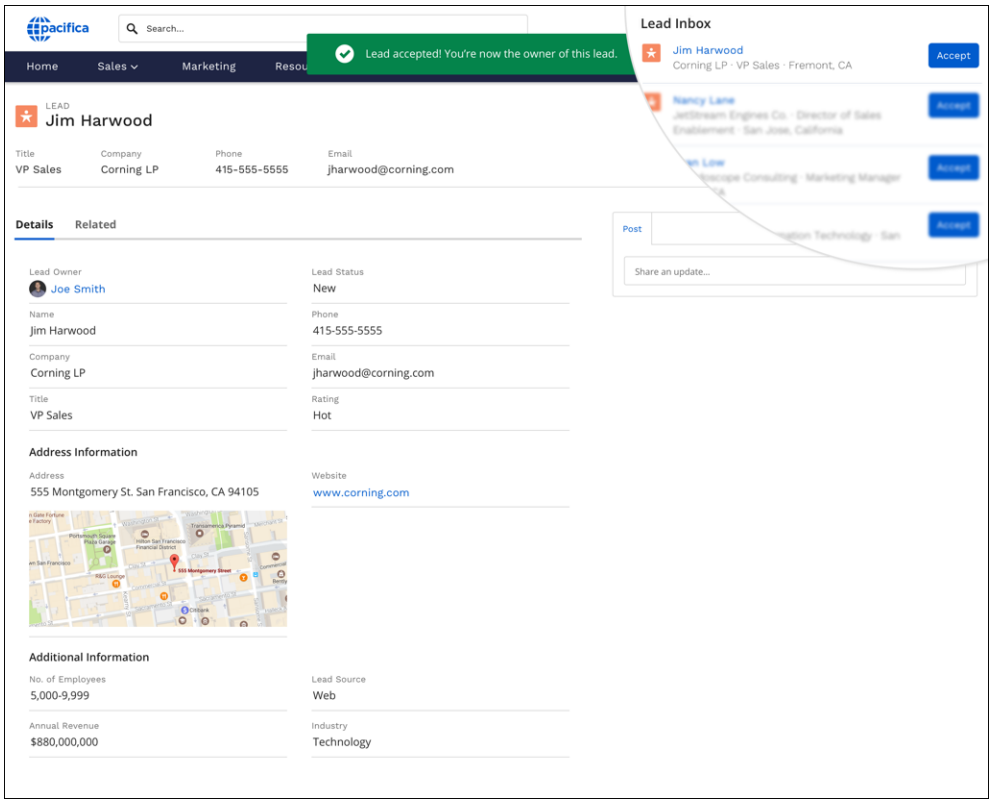
The Partner Central Home page, which includes the lead inbox, global search, navigation menu, Quick Create action menu, compact list views for deals and tasks, and reports and dashboards.



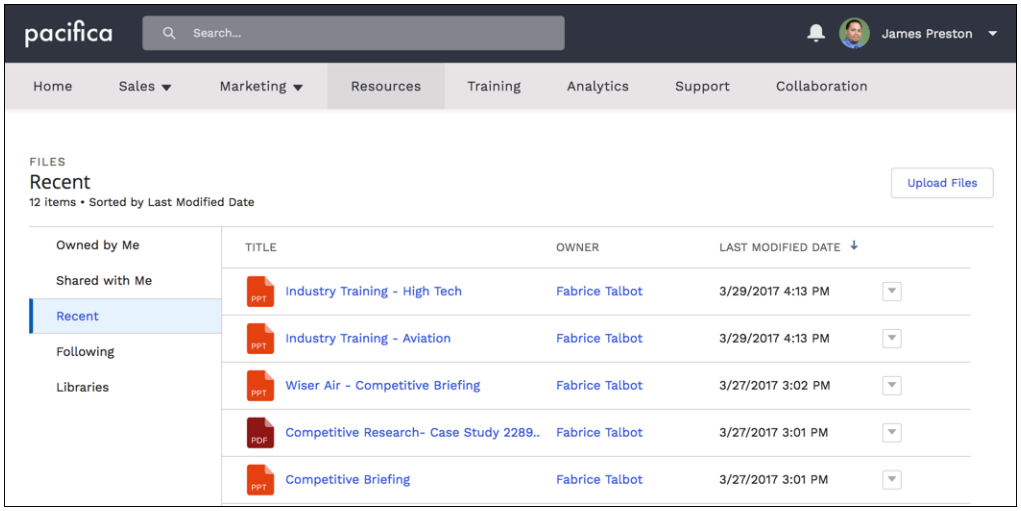
Leads List View



Lead Inbox and Lead Detail



Resources Page—Share Files and Libraries with Partners



The Customer Service Template

The Customer Service template provides a rich, self-service experience for your customers, where they can get answers to their questions at any time, on any device. With integrated knowledge articles and case management, customers can search for and view articles, post questions to the community, or contact a support agent.

What You Get Out-of-the-Box

- Lightning community pages and components
- Self-resolution of cases through knowledge and case creation
- Collaboration features such as groups, feeds, topics
- Global search with a customizable list of searchable objects
- Moderation rules to weed out trolls and bots
- Dashboards and reports
- Recommendations
- Customizable branding, design, and navigation
- Rich, responsive look and feel across multiple devices

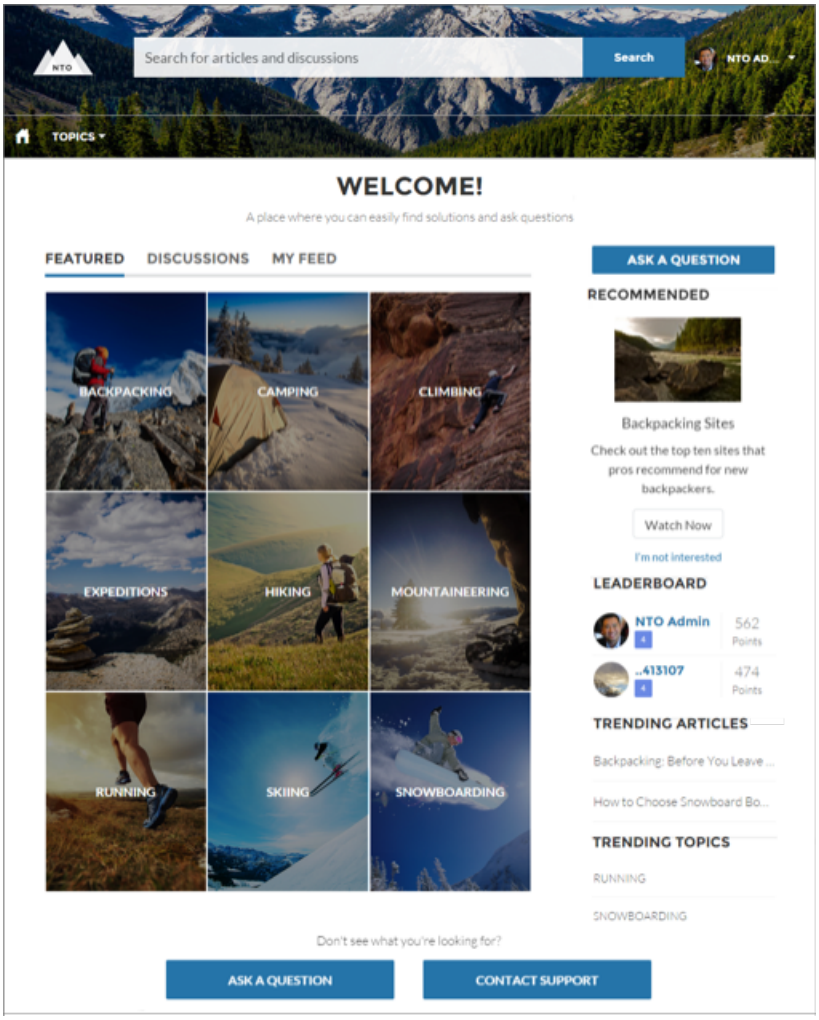
Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track community activity with Google Analytics.
- Prebuilt and custom Lightning components: Check out the full list of compatible Lightning components you can use to build out your community.

Customer Support in Action

Customer Service Home Page

The Customer Service Home page includes featured topics and feeds, a leaderboard, recommendations, trending articles and topics, and support options. In addition, every page in the Customer Service template includes the template header, which provides global search, a profile menu, and navigation.



Customers Can Find the Help They Need

The Customer Service template adds discussions and suggested articles to your support community. When customers type a question in the search text box, the results include articles and similar questions that are based on matches with the typed text. If the answer isn't in the results, they can get help from the community by asking a question in the community. Community experts discuss the issue and provide a solution. And if they decide to contact customer support, they're shown a list of suggested articles based on keywords from the case subject and description. So there's an excellent chance they can find an answer without needing to create a support case.

Both guest users and logged-in users can access articles, search and view discussions, and contact agents through official support channels. When they log in to the community, they're also able to ask questions and participate in discussions in the feed. Members in the community can answer questions in the community, just like commenting on a post in Chatter. And when a best answer is found, it's prominently displayed in the feed, allowing other users to quickly and easily find the answer.

Enhanced Profile and Navigation Experience

The Customer Service template has an enhanced profile and navigation experience for logged-in users. From the profile menu, users can quickly access their profile details, Chatter feed and list of cases, and contact customer support. Users with permissions to create or manage the community can also access community management and setup pages directly from the profile menu. Users can edit their contact information and profile photo directly from their profile details. They can view statistics, such as how many posts and comments

they've made and how many people they're following and are following them. User profiles also show user nicknames and reputation levels if they're enabled in the community.

Improved Community Organization with Topics

The Customer Service template adds the flexibility of topics to organize your community. Topics help you structure a community to quickly guide members to the information that matters most. Choose navigational topics to provide an easy way for customers to explore the community, and featured topics to highlight current conversations and issues. Trending topics and related topics let members find active discussions and popular content in the community. Member-created topics, meanwhile, let users organize information for each other, creating a personalized experience that boosts community engagement. When setting up a community, you associate topics with existing data categories, so your articles appear in the appropriate topics in the community.

Note: While the Customer Service template uses topics to display articles and questions, Knowledge articles are associated with data categories when they are created. To ensure that articles appear in the community, set data category visibility at the profile level for each category you associate with a topic. For instructions on setting default data category visibility, see Modify Default Data Category Visibility.

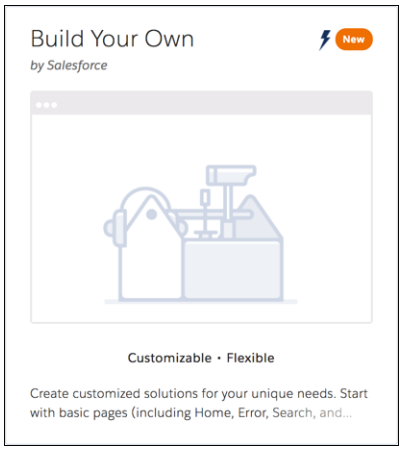
Included Pages

The Customer Service template includes the following pages.

- Home
- Account Management
- Article Detail
- Contact Support
- Create Record
- Error
- Feed Detail
- Messages
- Question Detail
- Quip Doc Related List
- Search
- Top Articles
- Topic Catalog
- Topic Detail
- User Settings
- Case object pages
- Dashboard object pages
- File object pages
- Group object pages
- Record object pages
- Report object pages
- Stream object pages
- User object pages
- Generic record pages
- Login pages

The Build Your Own Template

The Build Your Own template provides the basic pages every community needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your community.



What You Get Out-of-the-Box

- Lightning community pages and components
- Customizable branding and design

Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track community activity with Google Analytics.
- Prebuilt and custom Lightning components: Check out the full list of compatible Lightning components you can use to build out your community.

Add Pages and Components

To view all components in the Components panel, select **Settings** > **Advanced** and click **Show All Components** in the Components Panel area.

Objects Supported by Out-of-the-Box Components and Pages in Community Templates

Check out the list of all the objects supported by out-of-the-box components and pages in Community Builder-driven templates.

When we talk about supported objects in templates, we mean that you can use our out-of-the-box components on the object pages, as detailed here.

API names are indicated in parentheses.

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Account (Account)	✅	✅	✅
Activity History (ActivityHistory)	✅		
Address (Address)	✅		
Approval History (ProcessInstanceHistory)	✅		
Approval Process Work Item (ProcessInstanceWorkItem)	✅		
Approval Step (ProcessInstanceStep)	✅		
Asset (Asset)	✅	✅	✅
Asset Relationship (Asset Relationship)	✅		
Assigned Resource (AssignedResource)	✅		
Associated Location (AssociatedLocation)	✅		
Calendar (Calendar)	✅		
Campaign (Campaign)	✅	✅	✅
Campaign Member (CampaignMember)	✅	✅	
Case (Case)	✅	✅	✅
Channel Program (ChannelProgram)	✅	✅	
Channel Program Level (ChannelProgramLevel)	✅	✅	
Channel Program Member (ChannelProgramMember)	✅		
Contact (Contact)	✅	✅	✅
Contract (Contract)	✅	✅	✅
Custom Objects	✅	✅	✅

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Dashboard (Dashboard)	✅	✅	
Email Message (EmailMessage)	✅		
Event (Event)	✅		✅
External Objects	✅	✅	✅
Group (CollaborationGroup)	✅	✅	✅
Lead (Lead)	✅	✅	✅
Location (Location)	✅	✅	✅
Maintenance Asset (MaintenanceAsset)	✅		
Maintenance Plan (MaintenancePlan)	✅	✅	✅
Note (Note and NoteAndAttachment)	✅		✅
Open Activity (OpenActivity)	✅		
Operating Hours (OperatingHours)	✅	✅	✅
Opportunity (Opportunity)	✅	✅	✅
Opportunity Contact Role (OpportunityContactRole)	✅		
Opportunity Product (OpportunityLineItem)	✅		
Opportunity Team Member (OpportunityTeamMember)	✅		
Order (Order)	✅	✅	✅
Partner Fund Allocation (PartnerFundAllocation)	✅	✅	
Partner Fund Claim (PartnerFundClaim)	✅	✅	
Partner Fund Request (PartnerFundRequest)	✅	✅	

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Partner Marketing Budget (PartnerMarketingBudget)	✅	✅	
Price Book (Pricebook2)	✅	✅	
Price Book Entry (PricebookEntry)	✅		
Product (Product2)	✅	✅	
Product Consumed (ProductConsumed)	✅		
Product Item (ProductItem)	✅	✅	✅
Product Item Transaction (ProductItemTransaction)	✅		
Product Request (ProductRequest)	✅	✅	✅
Product Request Line Item (ProductRequestLineItem)	✅	✅	✅
Product Required (ProductRequired)	✅		
Product Transfer (ProductTransfer)	✅	✅	✅
Quote (Quote)	✅	✅	
Quote Line Item (QuoteLineItem)	✅		
Report (Report)	✅	✅	
Resource Absence (ResourceAbsence)	✅		
Resource Preference (ResourcePreference)	✅		
Return Order (ReturnOrder)	✅	✅	✅
Return Order Line Item (ReturnOrderLineItem)	✅		

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Service Appointment (ServiceAppointments)	✅		
Service Crew (ServiceCrew)	✅	✅	✅
Service Crew Member (ServiceCrewMember)	✅	✅	✅
Service Report (ServiceReport)	✅		
Service Resource (ServiceResource)	✅	✅	✅
Service Resource Capacity (ServiceResourceCapacity)	✅		
Service Resource Skill (ServiceResourceSkill)	✅		
Service Territory (ServiceTerritory)	✅	✅	✅
Service Territory Location (ServiceTerritoryLocation)	✅		
Service Territory Member (ServiceTerritoryMember)	✅		
Shipment (Shipment)	✅	✅	✅
Skill Requirement (SkillRequirement)	✅		
Shared Contacts (AccountContactRelationship)	✅		
Task (Task)	✅	✅	✅
Time Sheet (TimeSheet)	✅	✅	✅
Time Sheet Entry (TimeSheetEntry)	✅		
Time Slot (TimeSlot)	✅		
User (User)	✅		
Work Order (WorkOrder)	✅	✅	✅

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Work Order Line Item (WorkOrderLineItem)	✅		
Work Type (WorkType)	✅	✅	✅

Note: To be searchable in communities, objects must be searchable in Lightning Experience and supported in community templates.

Customer Service Community Setup Checklist

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Customer Service template.

Have you considered everything on these lists?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Before you begin:

Gather your branding assets:

- ☐ High-resolution image of your company logo
- ☐ Color scheme (or an image to upload to automatically generate one)
- ☐ Image to use as a header
- ☐ Thumbnail images (385x385 pixels), if you're using Featured Topics

In your internal Salesforce org:

- ☐ Enable Salesforce Communities. Choose a unique URL that works for your business, because you can't change it after it's been set.
- ☐ Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).
- ☐ Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge and Embedded Chat.
- ☐ Review profiles and add permission sets as needed.
- ☐ Set up Web-to-Case.

If you're using Salesforce Knowledge:

- ☐ Review your data categories.
- ☐ Enable feed tracking for your Knowledge article types.

As You're Making Your Community:

In your internal Salesforce org:

- [ ] Add members to your community.

Configure the Guest User Profile (access using Community Management or the Community Builder):

- [ ] Give read and create permissions for the case object.
- [ ] If using Salesforce Knowledge, give guests access to your data categories.

In Community Management or Community Workspaces:

- [ ] Set up navigational topics and subtopics, and associate articles to each topic.
- [ ] Set up featured topics and associated images.
- [ ] Download the latest Salesforce Communities Management from the AppExchange.
- [ ] Set up moderation criteria and rules.
- [ ] Enable and set up reputation.

In Community Builder:

- [ ] Customize your community to match your company's branding.
- [ ] Add standard and custom Lightning components to customize their design and content.

After Making Your Community

- [ ] Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.
- [ ] Incorporate their feedback, and then publish your community.
- [ ] Seed the community with some initial content: welcome posts, groups, and relevant or fun articles.

Migrate a Koa or Kokua Template Community to a New Template

The Koa and Kokua templates are in phased retirement, and you can no longer use them to create communities. Salesforce supports existing communities built with Koa and Kokua, but we recommend migrating to newer Lightning community templates. The new Lightning communities provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Migration Options

Because your Koa and Kokua communities aren't using the latest Lightning technology, we recommend creating a new Lightning community that reflects the most recent innovations and features.

If you choose to migrate your community by using the **Change Template** button from **Workspaces** > **Administration**, be aware that the migrated version won't reflect all the innovations made to the product.

To determine which Lightning template is right for your use case, check out Which Community Template Should I Use?. Also think about what you envision for the future. If your use case is strictly a help forum, consider using the Customer Service community. Otherwise, consider the Customer Account Portal as an option.

Note: Always test your community implementation first in a sandbox before publishing your new community. See Deploy a Community from Sandbox to Production.

Your Koa or Kokua community allows you to expose your Salesforce Knowledge implementation to the world while giving community users the chance to file cases. The Customer Service template lets you do both, but it also lets you do other things, such as add Chat

capabilities or the potential for customers to edit their cases. If the Customer Service template's extra features are more than you need, you can remove community pages and components.

Filtering in Searches

Koa and Kokua searches allow community users to filter by article type and category. These filtering options are only available in the Koa and Kokua templates. However, you can scope searches to specific topics and see all articles associated with that topic. You can also look for search components created by trusted Salesforce partners and distributed via AppExchange.

Data Categories Versus Topics

Your Koa or Koa community used your Salesforce Knowledge setup and data categories to organize content for your community. The Customer Service template also uses Salesforce Knowledge in the back end to organize content, but in the community, content is organized using topics. You can map the articles in your data categories to topics in a community.

To map articles to topics automatically:

1. Select **Community Workspaces** > **Content Targeting** > **Automatic Topic Assignment**.
2. Enable **Automatic Topic Assignment**.
3. Map topics to data category groups and data categories. You can choose to add the topics to all existing articles existing and articles added in the future.

Because data categories aren't the primary content organization scheme in the Customer Service template, you can't use the following components.

- Article Type Filter
- Category Filter
- Category Navigation
- Expanded Category Navigation
- Featured Data Categories
- Featured Search
- Trending Articles

You can map your exact hierarchy from data categories to topics, up to eight levels of depth.

Data Category Permissions

Thoroughly check the data category permissions for all profiles accessing your newly built community. If you add new profiles and users to your community, make sure that all the articles' data categories are set to the right permissions for your users. In particular, check the permission on the guest user profile for each community.

Viewing Articles

The Article Listview and Article Home components are only supported in the Koa and Kokua templates. Use the Top Articles by Topic component for a list view in a Customer Service community. When you click a topic in the Top Articles by Topic component, you see the topic detail page with a list of articles for that topic.

Left-Hand Navigation

Use custom themes to replicate the left-hand navigation scheme seen in the Koa and Kokua templates.

New URL

Your new community's URL is different from your old Koa or Kokua URL. Give your customers a smooth transition from one to the next by following these steps.

1. In your Koa or Kokua community, select **Workspaces** > **Administration**.
2. Click the pencil button to change the community's URL.

3. Change the URL, and click **Save**.
4. In your new community, select **Workspaces** > **Administration**.
5. Click the pencil button to change the community's URL.
6. Change the URL to match your old URL.
7. To handle bookmarked articles, consider rewriting your communities' URLs.

Important: Change the URL only after testing that your new community works just as you want it to.

Which Components Can I Use with Each Template?

Lightning community templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which templates each component can be used in, and when it became available.

Tip: The Components panel in Community Builder lists all components that you can add to the page you're editing.

Communities that are based on Salesforce Tabs + Visualforce don't use Lightning components.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

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Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Article Content	✓	✓	✓		✓	All versions
Ask Button	✓	✓			✓	All versions
Breadcrumb	✓	✓	✓	✓	✓	All versions
Calendar				✓		
Campaign Marketplace	✓	✓	✓	✓	✓	All versions
Case Attachments	✓				✓	Before Summer '17[1]
Case Banner	✓				✓	Before Summer '17[1]

[1] This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Case Comments	✓				✓	Before Summer '17[1]
Case Comments Publisher	✓				✓	All versions
Case Deflection	✓	✓	✓	✓	✓	Spring '18 and later
Case Detail	✓				✓	Before Summer '17[1]
Case Feed	✓				✓	From Summer '15 until Summer '17[1]
Case Feed Publisher	✓				✓	From Summer '15 until Summer '17[1]
Case List	✓				✓	Before Summer '17[1]
CMS Collection	✓	✓	✓	✓	✓	Winter '19 and later
CMS Connect (HTML)	✓	✓	✓	✓	✓	All versions
CMS Connect (JSON)	✓	✓	✓	✓	✓	All versions
CMS Single Item on page 241	✓	✓	✓	✓	✓	Winter '19 and later
CMS Single Item (Detail) on page 244	✓	✓	✓	✓	✓	Winter '19 and later
Community Calendars	✓	✓	✓		✓	All versions
Contact Request Button & Flow	✓	✓	✓		✓	Spring '19 and later
Contact Support Button	✓	✓	✓	✓	✓	All versions
Contact Support & Ask Buttons[2]	✓				✓	Winter '16 and later

[2] Contact Support is included as part of the Contact Support & Ask Buttons component.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Contact Support Form	✓	✓	✓		✓	Spring '18 and later
Create Case Form	✓	✓	✓		✓	All versions
Create Record Button	✓	✓	✓		✓	Winter '16 and later
Create Record Form	✓	✓	✓		✓	Winter '16 and later
Custom Lightning Components	✓	✓	✓	✓	✓	Winter '16 and later
Dashboard	✓	✓	✓		✓	Winter '16 and later
Dashboard List	✓	✓	✓		✓	Winter '16 and later
Deflection Tracking	✓*	✓†	✓†	✓†	✓*	* Spring '19 and later † Summer '19 and later
Einstein Analytics Dashboard	✓	✓	✓		✓	Summer '17 and later
Engagement	✓		✓			Winter '17 and later
Featured Topics	✓	✓		✓	✓	Winter '16 and later
Featured Topics & Feeds	✓				✓	All versions
Feed	✓	✓	✓		✓	Winter '16 and later
Feed Compact	✓	✓	✓		✓	Winter '16 and later
Feed History	✓	✓	✓		✓	Winter '17 and later
Feed Post & Comments	✓	✓	✓		✓	Summer '15 and later
Feed Publisher	✓	✓	✓		✓	Winter '16 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Files List	✓	✓	✓	✓	✓	Winter '16 and later
Flow	✓	✓	✓	✓	✓	Winter '18 and later
Follow Button	✓	✓			✓	Summer '15 and later
Global Search Box	✓	✓	✓		✓	All versions
Global Search for Peer-to-Peer Communities	✓					
Global Search Results	✓	✓	✓	✓	✓	All versions
Group	✓	✓	✓		✓	Winter '16 and later
Group Banner	✓	✓	✓		✓	Winter '16 and later
Group Detail	✓	✓	✓		✓	Winter '16 and later
Group Related List	✓	✓	✓		✓	Winter '16 and later
Headline	✓	✓		✓	✓	All versions
HTML Editor	✓	✓	✓	✓	✓	All versions
Event Insights	✓	✓	✓	✓		Winter '19 and later
Knowledgeable People	✓	✓			✓	Summer '15 and later
Language Selector	✓	✓	✓	✓	✓	Winter '16 and later
Lead Inbox	✓	✓	✓		✓	Summer '17 and later
Libraries	✓	✓	✓	✓	✓	Winter '18 and later
Member Profile and Settings	✓	✓	✓		✓	Winter '18 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Membership	✓	✓	✓		✓	Winter '17 and later
Message Notification	✓	✓			✓	Spring '17 and later
Navigation Bar	✓				✓	Before Winter '16
New Message Button	✓	✓			✓	Spring '17 and later
Path (Lightning Community Component)	✓	✓	✓		✓	Winter '16 and later
Paused Flows	✓	✓	✓		✓	All versions
Profile Header	✓	✓	✓		✓	Before Winter '18[3]
Quip				✓		
Quip Docs Related List				✓		
Recommendations		✓			✓	Winter '18 and later
Recommendations Carousel	✓	✓	✓	✓	✓	Summer '15 and later
Record Banner	✓	✓	✓		✓	Winter '16 and later
Record Information Tabs	✓	✓	✓		✓	Winter '16 and later
Record List	✓	✓	✓		✓	Winter '16 and later
Record Related List	✓	✓	✓		✓	Winter '16 and later
Related Articles List	✓	✓	✓		✓	Summer '16 and later
Related Questions List	✓	✓			✓	Summer '16 and later

[3] User Profile Menu replaces Profile Header in Lightning templates based on Winter '18 and later versions of Lightning templates.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Related List - Single	✓	✓	✓		✓	Winter '19 and later
Related Topics List	✓	✓	✓		✓	Spring '15 and later
Report Chart	✓	✓	✓		✓	Winter '16 and later
Report List	✓	✓	✓		✓	Winter '16 and later
Report Summary	✓	✓	✓		✓	Winter '16 and later
Reputation Leaderboard	✓	✓	✓		✓	Spring '15 and later
Rich Content Editor	✓	✓	✓	✓	✓	Winter '16 and later
Scroll To	✓				✓	All versions
Search & Post Publisher	✓				✓	All versions
Search Results	✓	✓	✓	✓	✓	All versions
Set Case Status Button	✓	✓			✓	All versions
Embedded Service	✓	✓	✓		✓	Summer '17 and later
Stream Detail	✓	✓	✓		✓	Winter '18 and later
Stream List	✓	✓	✓		✓	Winter '18 and later
Suggested Actions on page 346	✓	✓	✓	✓	✓	Spring '19 and later
Survey	✓	✓	✓		✓	Winter '18 and later
Tabs	✓	✓	✓	✓	✓	Winter '16 and later
Tile Menu (Beta)	✓	✓	✓	✓	✓	All versions

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
Top Article by Topic	✓	✓	✓		✓	Winter '16 and later
Topic Catalog	✓	✓	✓	✓	✓	Spring '16 and later
Topic Description	✓	✓			✓	Spring '16 and later
Topic Metrics	✓	✓	✓		✓	Winter '16 and later
Topics	✓	✓	✓		✓	Winter '19 and later
Totals	✓	✓	✓		✓	Winter '16 and later
Trending Articles by Topic	✓	✓	✓		✓	Winter '17 and later
Trending Topics	✓	✓	✓	✓	✓	Spring '15 and later
Unanswered Questions	✓	✓			✓	Winter '16 and later
User Profile	✓	✓	✓		✓	Spring '16 and later
User Profile Detail	✓	✓	✓		✓	Winter '16 only
User Profile Image	✓	✓	✓		✓	All versions
User Profile Knowledgeable About	✓	✓			✓	Winter '16 and later
User Profile Menu	✓	✓	✓		✓	Winter '18 and later[3]
User Profile Related List	✓	✓	✓		✓	Spring '16 and later
User Profile Stats	✓	✓			✓	Spring '15 and Summer '15
User Profile Summary	✓	✓	✓		✓	All versions

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own	Available in Versions
User Profile Tabs	✓	✓			✓	Spring '15 and later
User Settings	✓	✓	✓		✓	Spring '15 and later
Visualforce Page Component	✓	✓	✓	✓	✓	Spring '17 and later

Login Components

Component	Available in Versions
Employee Login Link	All versions
Forgot Password	All versions
Login Form	All versions
Self-Registration	All versions
Social Login	All versions

SEE ALSO:

Getting Started with the Aloha Community Template for Salesforce Identity

Components for Use with the Koa and Kokua Community Templates

Find out which components you can use with the Koa and Kokua self-service community templates.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

Component	Koa	Kokua	Available in Versions
Article List	✓	✓	All versions
Article Type Filter	✓	✓	All versions
Article Content	✓	✓	All versions
Back Button	✓	✓	Spring '15 and earlier

Component	Koa	Kokua	Available in Versions
Case Attachments	✅	✅	All versions
Case Banner	✅	✅	All versions
Case Comments	✅	✅	All versions
Case Comments Publisher	✅	✅	All versions
Case Detail	✅	✅	All versions
Case Feed	✅	✅	Summer '15 and later
Case Feed Publisher	✅	✅	Summer '15 and later
Case List	✅	✅	All versions
Category Filter	✅	✅	All versions
Category Navigation	✅	✅	All versions
Contact Support & Ask Buttons	✅	✅	All versions
Create Case Form	✅	✅	All versions
Expanded Category Navigation	✅	✅	All versions
Featured Data Categories	✅	✅	All versions
Featured Search	✅	✅	All versions
Feed Post & Comments	✅	✅	Summer '15 and later
HTML Editor	✅	✅	All versions
Language Selector	✅	✅	Winter '16 and later
Profile Header	✅	✅	All versions
Rich Content Editor	✅	✅	Winter '16 and later
Search	✅	✅	All versions
Set Case Status Button	✅	✅	All versions
Toggle Button	✅	✅	All versions
Trending Articles	✅	✅	All versions
User Profile Image	✅	✅	All versions
User Profile Summary	✅	✅	All versions

Component	Koa	Kokua	Available in Versions
User Profile Summary & Image	✓	✓	Winter '16 and later
CUSTOM COMPONENTS			
Custom Lightning Components	✓	✓	Winter '16 and later

Account Brand Details

Use the Account Brand Details component to show company information and brand details on the Account Management page.

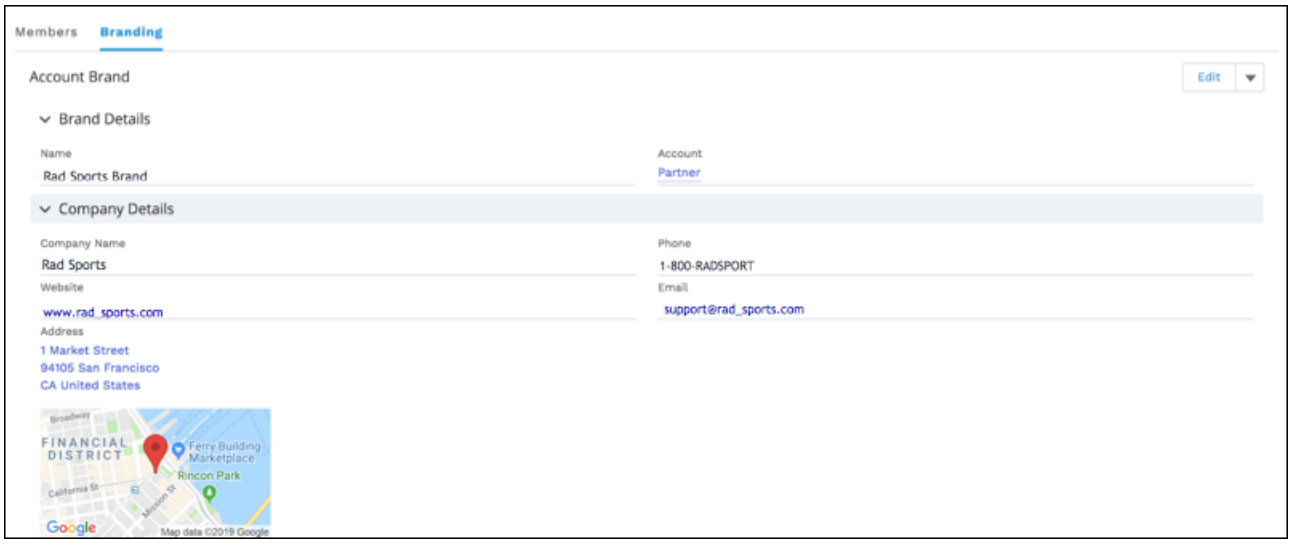
When you go to the Account Management page, you can access both Community Members and Account Brand Details. Account Brand Details contains company information used for branding purposes, such as websites, email address, phone numbers, addresses, and company logos.

Note: Add the Account Brand related lists to Accounts, so partners can access brand information.

1. Drag the **Account Brand Details** component to the page, and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Account Id`	Account Id is used to look up the associated Account Brand record.

Example: Account Brand Details component:



Account Management

Channel managers can delegate partner users to help manage accounts. Using the Members tab, delegated account managers can activate and deactivate accounts and reset a member's password. They can also manage branding assets that channel managers can use to create co-branded emails, marketing campaigns, and websites.

Partner users who have been granted delegated external user administration rights can access Account Management from their community. From Account Management, they can manage members of their partner account from the **Members** tab.

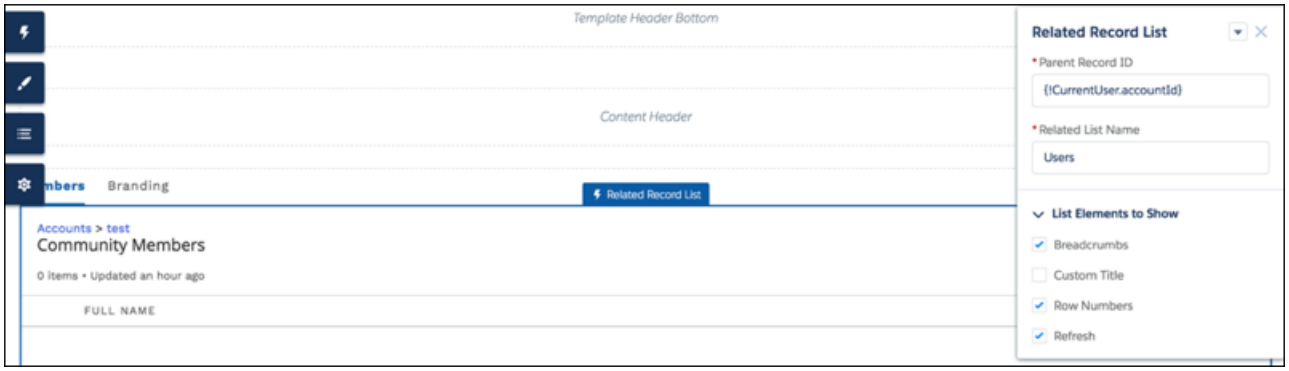
Partner users who have been granted delegated external user administration can create and edit account brands from the **Branding** tab.

Note: Add the **Account Brand** and **Community Members** related lists to **Accounts**, so partners can access member and brand information.

1. Select the **Account Management** component in the page you're configuring.
2. Click the tab that you would like to configure.
3. To view the component properties, select the Properties pane:

Property	Details
`Parent Record ID`	{!CurrentUser.accountId}
`Related List Name`	Name of the related list displayed.
`List Elements to Show`	• Breadcrumbs • Custom Title • Row Numbers • Refresh
`Account Id`	{!CurrentUser.accountId}

Example: Account Management component in Community Builder



Activity Timeline

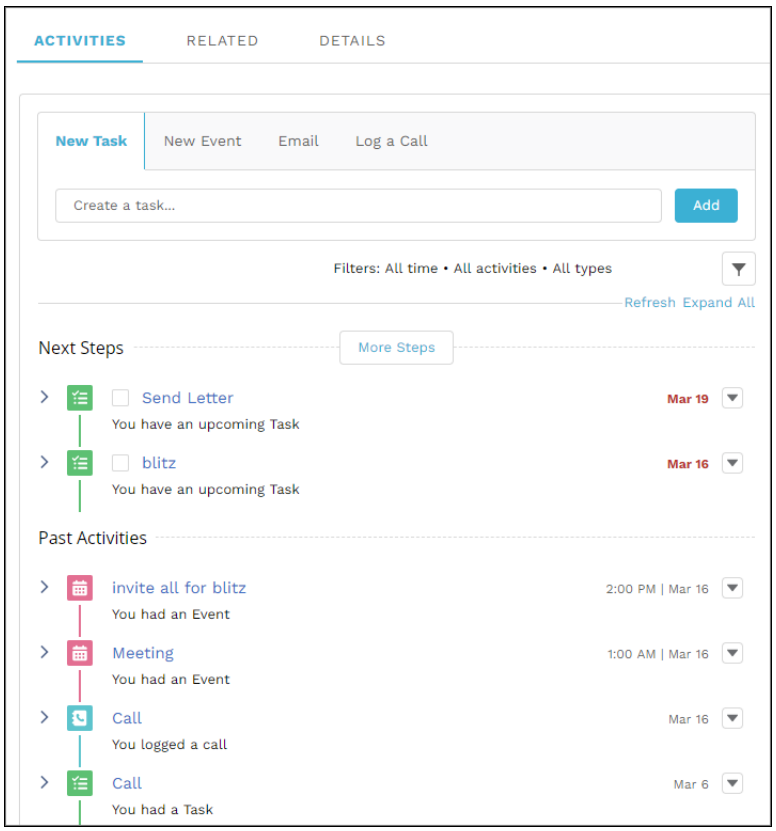
Track your open activities and activity history and view them from a record information tab in your community.

The activity timeline is supported for accounts, campaigns, contacts, contracts, leads, opportunities, orders, quotes, and activity-enabled custom objects.

1. Select the **Activities** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`RecordId`	The ID of the record. This value is automatically populated.

Example:



Article List

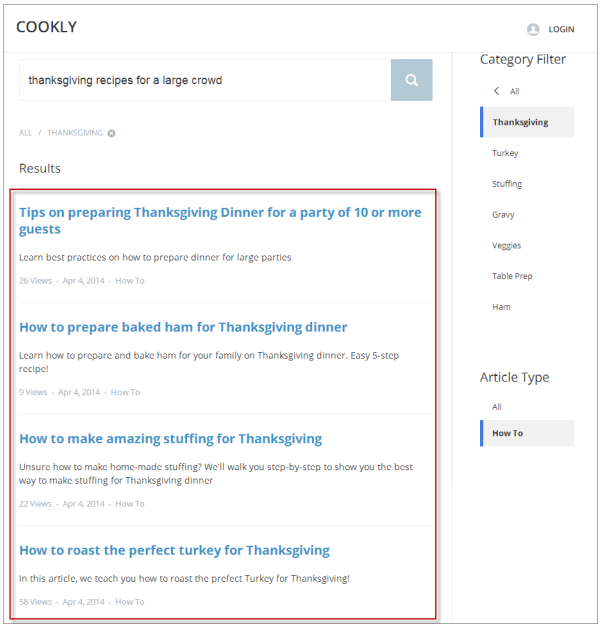
The Article List component lets users view articles that result from a search or from filtering without needing to leave the page.

The list includes the name and the type of article, its most current revision date, as well as how many views it's received. The list of articles can be filtered using the Article Type Filter component. The component also includes a breadcrumb component with navigation links, and a button that controls the appearance of the right menu for tablets and mobile display.

1. Select the **Article List** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Page Size`	Enter the number of articles per page of the list. The default is 25.
`Article Type`	Specify the type of article to appear in the list.
`Search Term`	Leave this field blank. It's the field in which users type their search queries.

Example: Sample Article List component:



SEE ALSO:

Which Components Can I Use with Each Template?

Article Type Filter

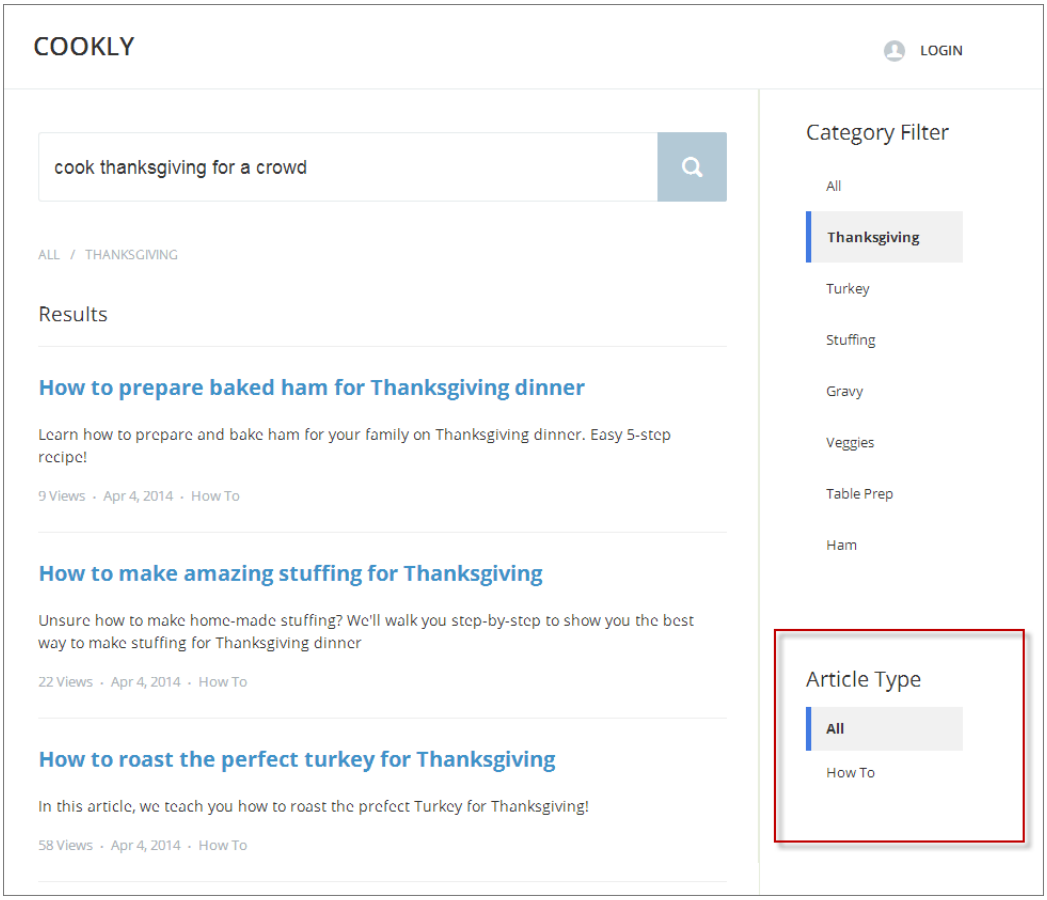
The Article Type Filter component lets users filter the article list based on the selected article type after they've viewed search results.

An article's type determines the type of content it contains, its appearance, and which users can access it.

1. Select the **Article Type Filter** component in the page you're configuring.

   There are no properties to set for this component.

Example: Sample Article Type Filter:



SEE ALSO:

Which Components Can I Use with Each Template?

Article Content

The Article Content component lets users view and vote on an individual article after they've selected it from search results.

Note: Before Spring '16, this component was named Single Article View.

The article's title, latest revision date, and article type appear with the body of the article.

Note: When a user views an article that's been returned from a Web search, the navigation breadcrumbs show the path to the first category associated with the article.

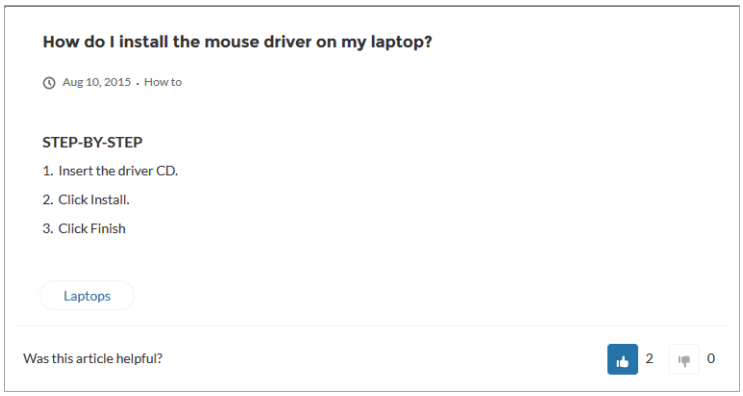
If you enable article voting for this component, authenticated users see a prompt to vote below each article. Users can give articles a thumbs up or thumbs down vote. If your org uses star rating on articles, thumbs up votes are recorded as five stars and thumbs down votes are recorded as one star. Article voting is available in the Winter '16 and later versions of community templates.

When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

1. Select the **Article Content** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Record Id`	This value is retrieved when the individual article is selected.
`URL Name`	This value is retrieved when the individual article is selected.
`Show title in the article header`	Select this option to show the title in the article's header.
`Allow voting on articles`	Select this option to let users vote on articles. This option is not selected by default. This functionality is available only in the Winter '16 and later versions of community templates.
`Show topics`	Select this option to show topics associated with an article.

Example: Sample Article Content component:



SEE ALSO:

Which Components Can I Use with Each Template?

Articles with This Topic

The Articles With This Topic component is used on the Topic Detail page in communities built using the Customer Service template. It shows articles that have been tagged with the topic in question.

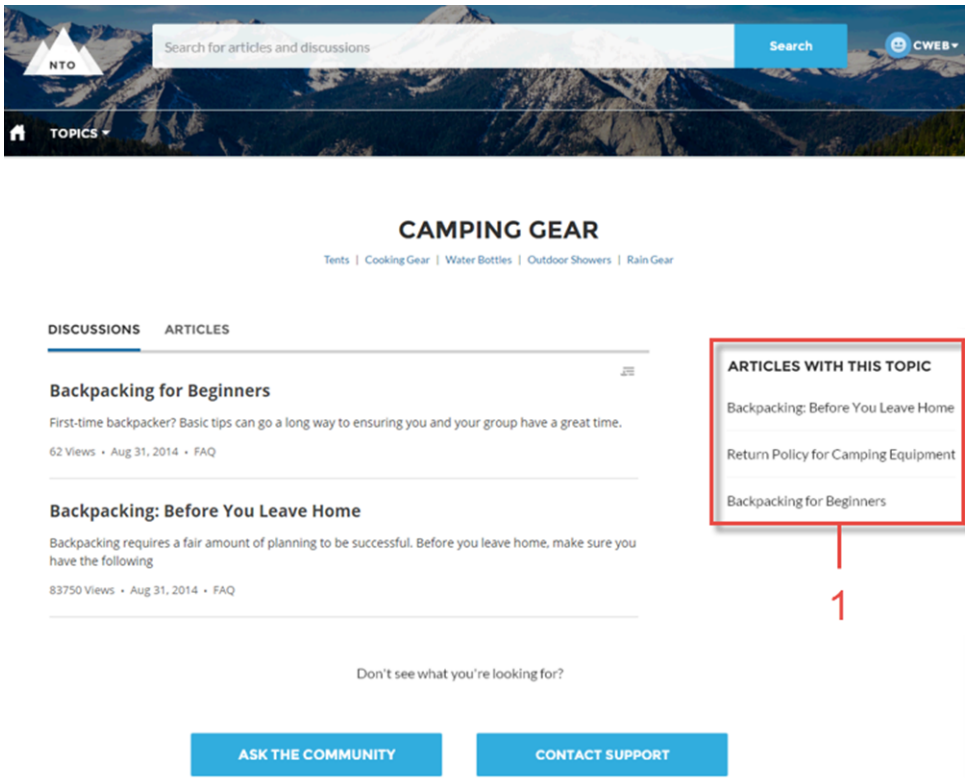
1. Select the **Articles With This Topic** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Topic ID`	The system supplies this value, and populates the component with articles specific to the topic shown on the topic detail page.
`Title`	Enter text for the title. The default text is `Articles With This Topic`.

Property	Details
`Show Title`	Show the title by checking this box.
`Number of Articles`	Select the number of articles you'd like to show at a time. The default number is 10.

Note: In order for articles to populate this component, the community language and article language must match.

Example: Sample Articles With This Topic component:



SEE ALSO:

Which Components Can I Use with Each Template?

Ask Button

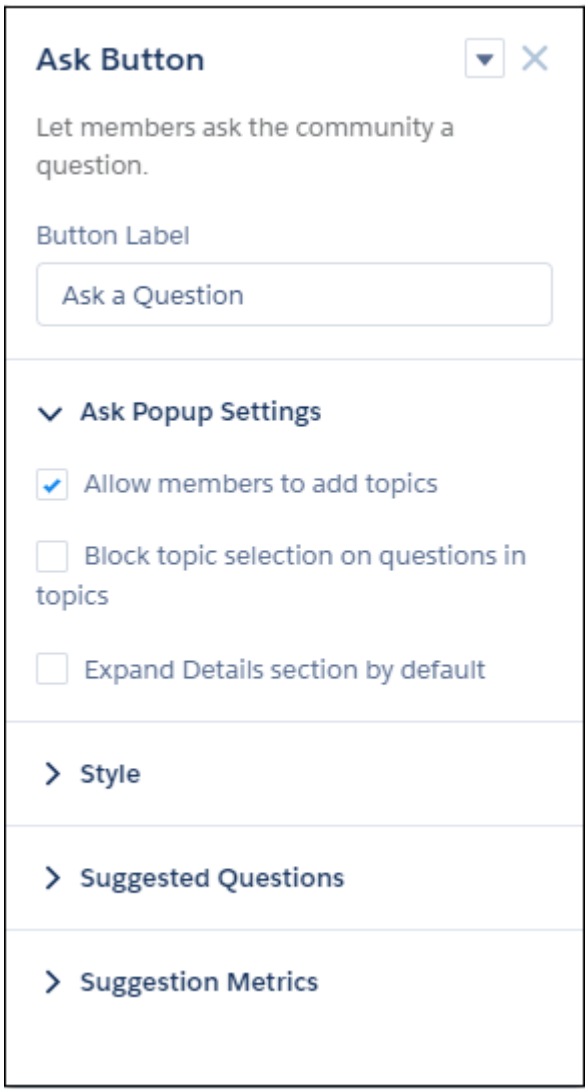
The Ask Button component lets users click a button to ask a question that is then published to the community. Users must log in to ask questions and participate in discussions.

Note: Before Spring '16, this component was named Ask the Community.

The Customer Service template pages come with two Ask Button components: one at the top of the page, and one at the bottom. The two aren't linked, so you can remove one button or use different text or styling for each button.

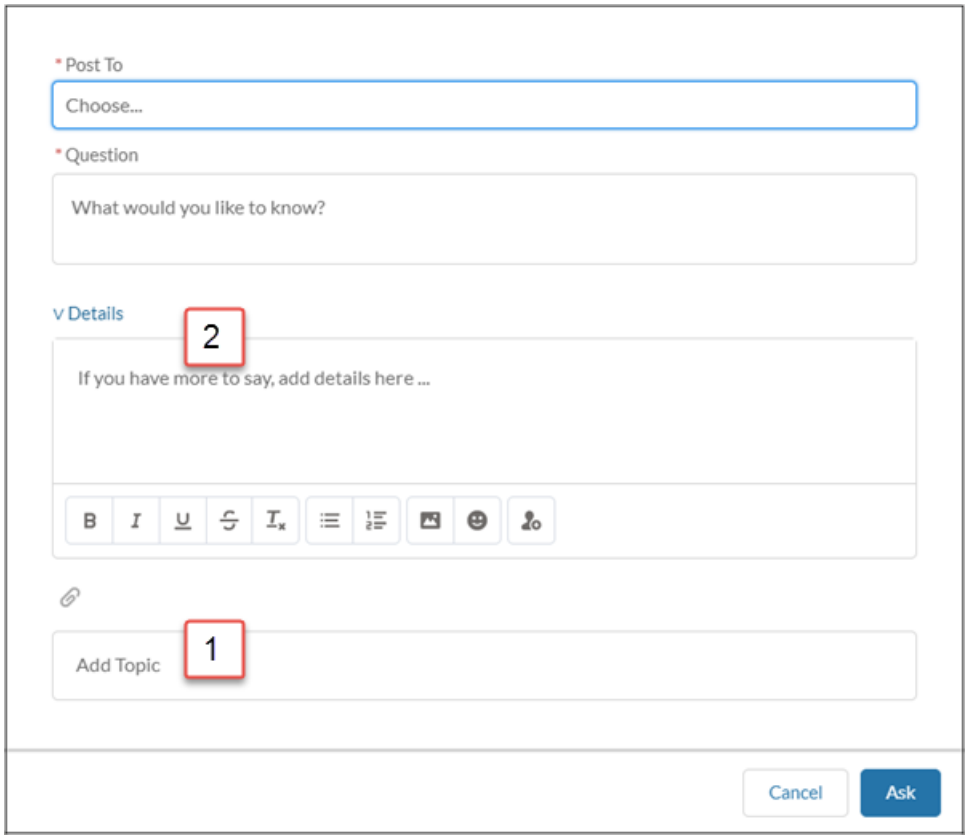
1. Select the **Ask Button** component on the page you're configuring.

2. In the property editor, configure properties for the component:



Property	Details
`Button Label`	Enter the text to show on the Ask button. The default is *`Ask a Question`*.
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher (1) and to allow members to add topics.
`Block topic selection on questions in topics`	In a topic feed, block members from choosing a different topic from the Post To list when they ask a question.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state (2).

Property	Details
`Button Text Color`	Set the color to use for button text when the button is inactive. Note: For all values, link icon shows that the current selection comes from colors defined in the community theme.
`Button Text Hover Color`	Set the color to use for button text when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Set the position of a button within its container by selecting *`Center`*, *`Left`*, or *`Right`*.
`Suggest questions`	Select to show previous questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that asks if they were satisfied with the information provided when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.
`Follow-Up Prompt`	Enter the follow-up question you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*



Example: Sample Ask Button component:

SEE ALSO:

Which Components Can I Use with Each Template?

Case Deflection

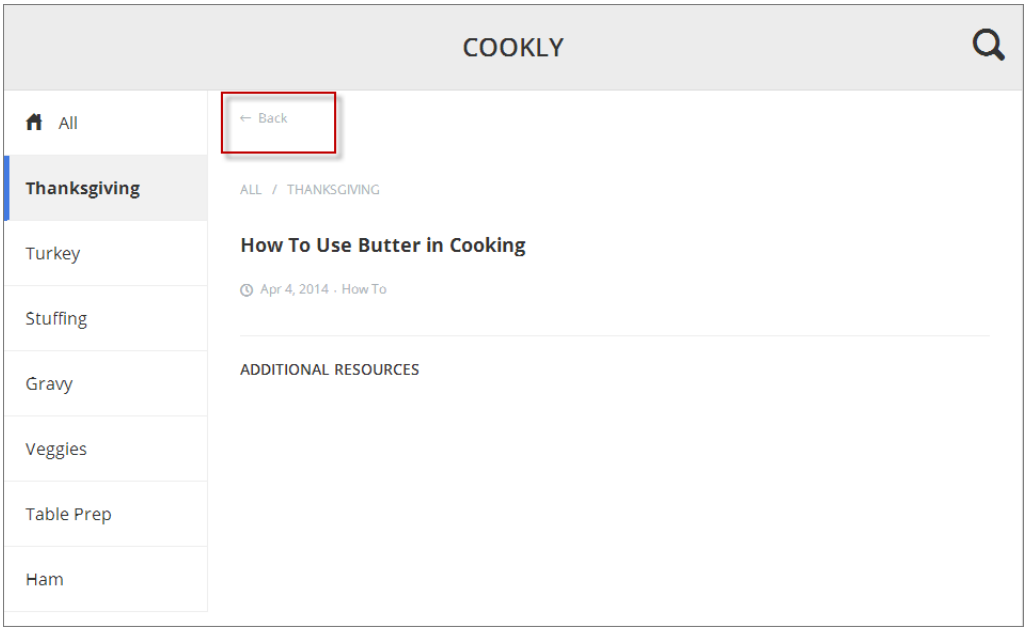
Back Button

The Back Button component displays a button that lets users navigate to the previous context.

Note: The Back Button is available as a standalone component only in Kokua communities built before the Spring '15 release.

1. Select the **Back Button** component in the page you're configuring.
   There are no properties to set for this component.

Example: Sample Back Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

Breadcrumb

Use the Breadcrumb component in the Customer Service template on topic, article, or feed detail pages to let your customers easily navigate back to parent or grandparent topics.

1. Select the **Breadcrumb** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Unique Name or ID`	Use `{!topicID}` on topic pages, `{!feedItemID}` on question or feed item pages, and `{!urlName}` on article pages.

Note: While topics reside in a fixed hierarchy, articles and feeds can be assigned to multiple topics at once. When an article or feed is assigned to a multiple of topic hierarchies, the Breadcrumb component shows topics that are the most discussed in a community.

SEE ALSO:

Which Components Can I Use with Each Template?

Campaign Marketplace

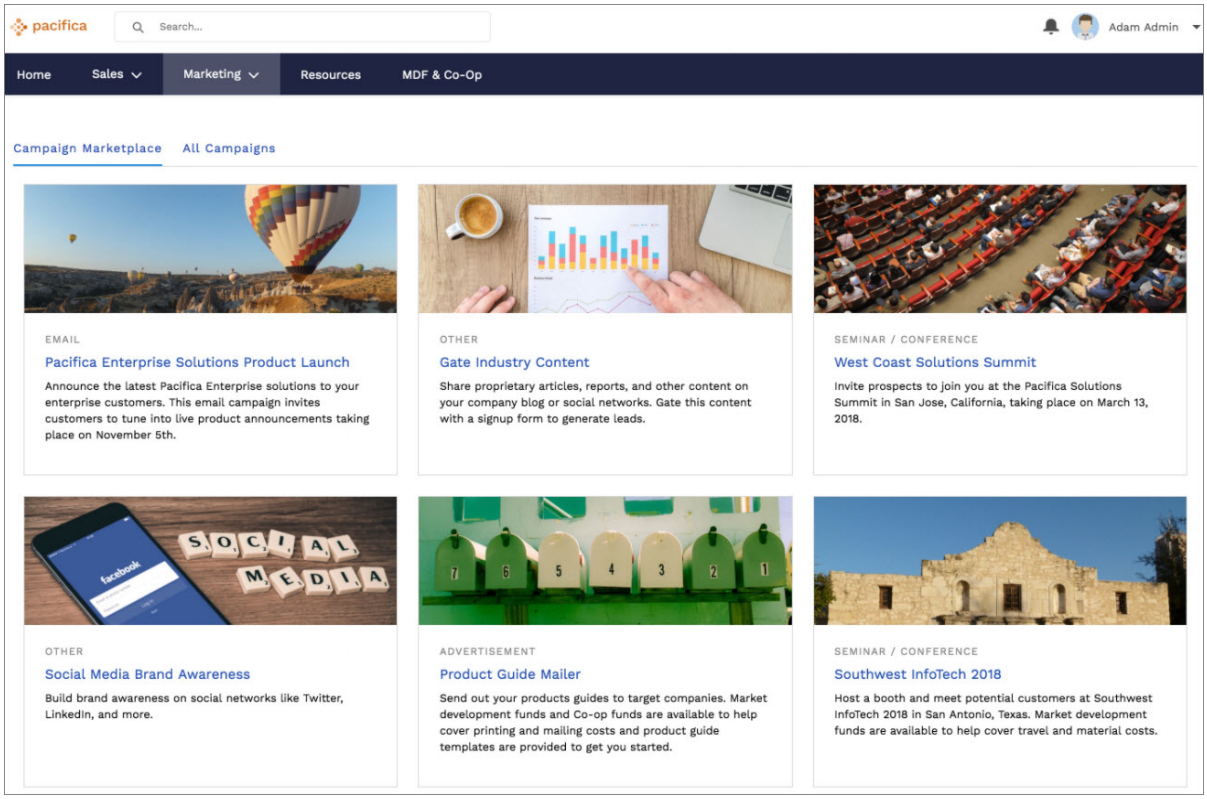
With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. Partners can then choose which campaigns work best for them.

Configure Campaign Marketplace to display pre-approved campaigns for partners. This feature is available in Lightning communities and Lightning Bolt solutions.

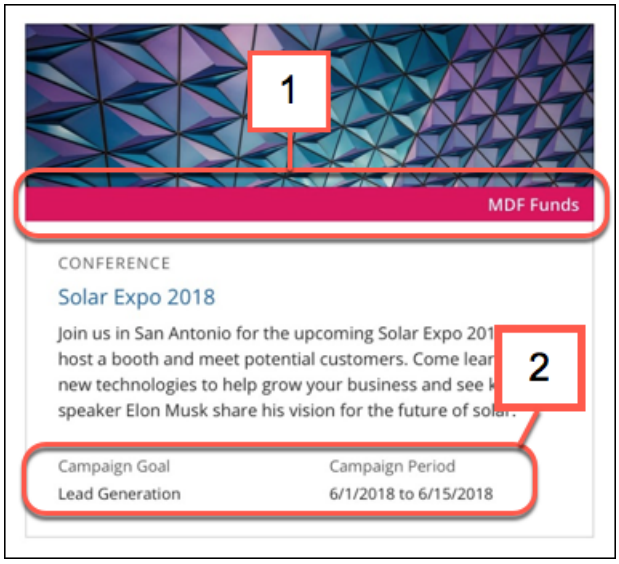
1. Select the **Campaign Marketplace** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`List View Name`	This field looks up to the list view of campaigns created by the admin.
`Sort By`	This field establishes how campaign tiles are categorized.
`Sort Order`	This field establishes the order that campaign tiles appear in.
`Header Label`	The label that appears at the top of the campaign marketplace.
`Show Image`	Select this option to display the `Image` field on a campaign.
`Highlight`	This designates the field to highlight in the campaign marketplace.
`Highlight Color`	Select a color to highlight your campaigns with.
`Category Field`	This field appears at the top of each campaign tile. Add a category field to callout important information about a campaign.
`Title Field`	The title of the campaign.
`Body Field`	Information displayed in the body of the campaign tile.
`Data Fields`	Add data fields to call out additional important information about a campaign. The data fields appear at the bottom of the campaign tile.

Example: Organize marketing campaigns with the Campaign Marketplace.



Add 1) highlights and 2) data fields to call out additional information about a campaign.



Case Attachments

The Case Attachments component lets users view a list of all attachments associated with a case.

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

Mobile device users can expand and collapse the list of attachments when they are looking at the details of their case.

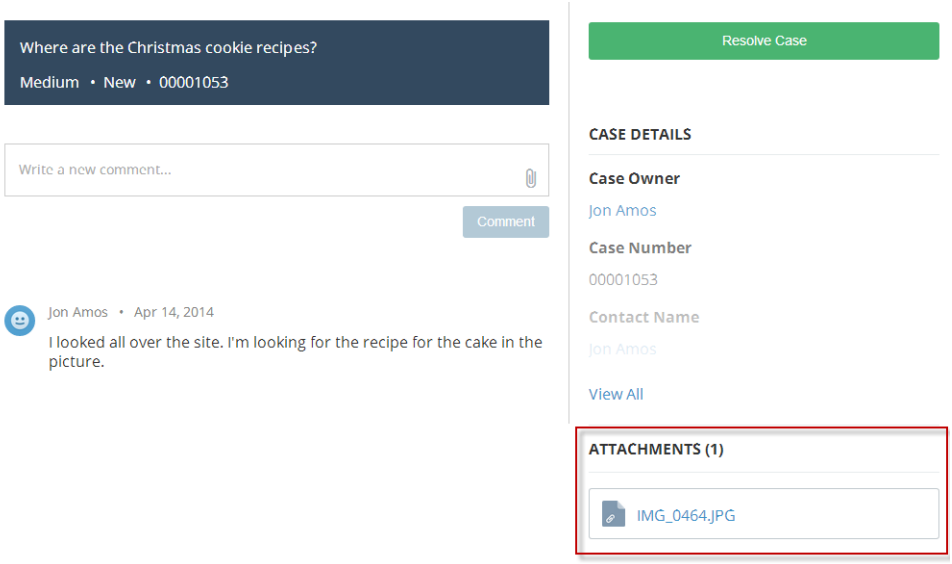
Note:

- You can't attach a file to a case while in Preview mode in Community Builder. When the community is published, you can attach files to cases.
- For users to see case attachments, the Case page layout and case record types for their profile must include the Attachments related list.

1. Select the **Case Attachments** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

Example: Sample Case Attachments component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Banner

The Case Banner component lets users see a case's status, case ID, and other summary information.

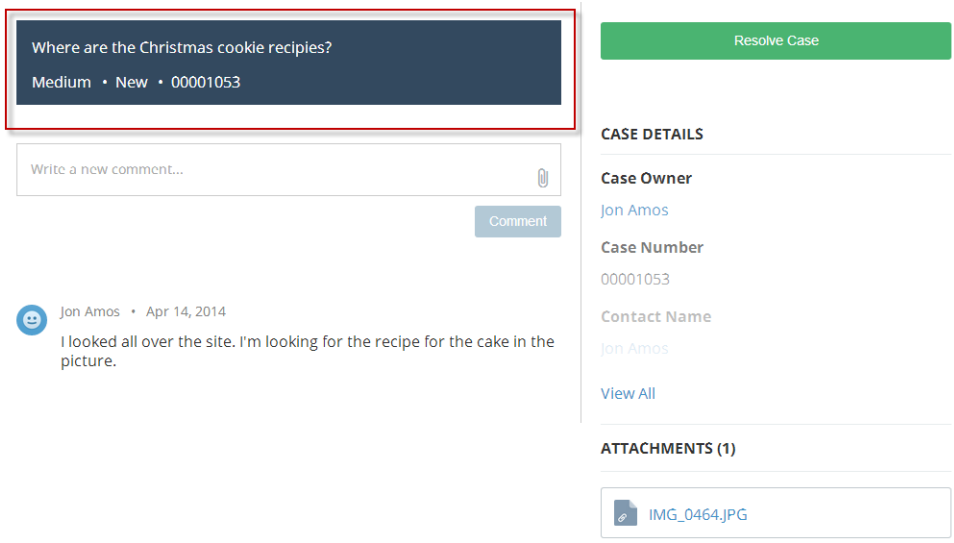
Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

1. Select the **Case Banner** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

Note: Before Spring '16, this component was named Case Highlights.

Example: Sample Case Banner component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Comments

The Case Comments component in Community Builder shows a list of all the comments that a customer and an agent have added to the case. The comments are visible as related records.

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

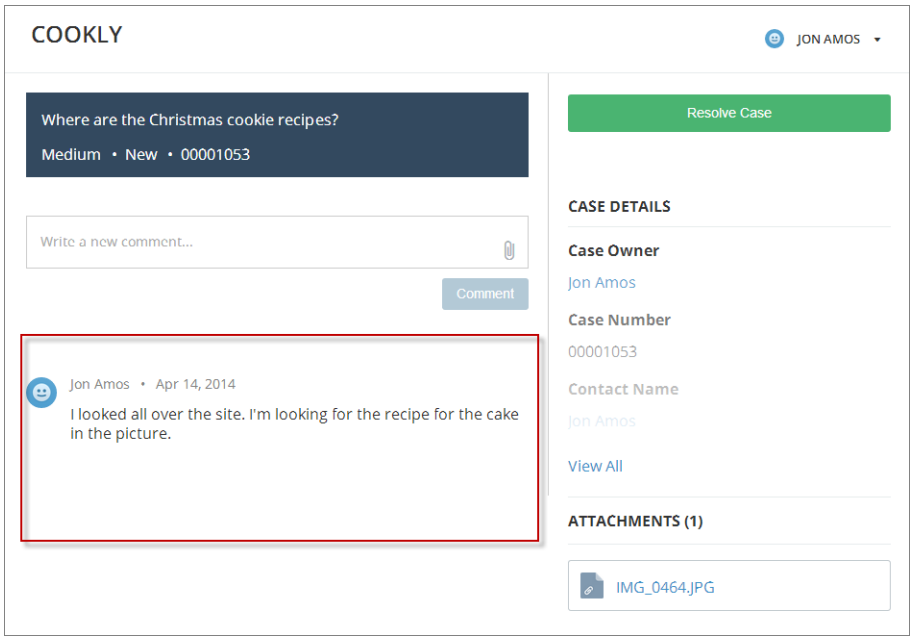
If an attachment has been uploaded with a comment it is shown separately in the Attachments component.

Note: For users to see case comments, the Case page layout and case record types for their profile must include the Case Comments related list.

1. Select the **Case Comments** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

Example: Sample Case Comments component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Deflection

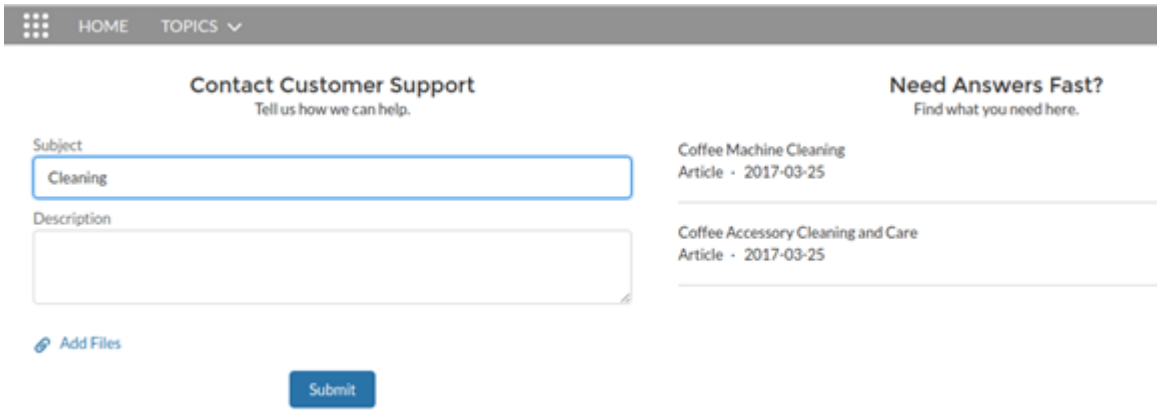
The Case Deflection component searches text as it's being entered into the Contact Support Form component, and returns relevant articles and discussions. If users don't get the answer they need, they can continue with their request for support.

If you built your community before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing community to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your community's case deflection. Check out this topic if you want to migrate to the new components.

1. Select the **Case Deflection** component in the page you're configuring. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand.
`Title`	Text that appears above suggested articles and discussions. The default is **Need Answers Fast?**.
`Subtitle`	Subtitle shown above suggested articles and discussions. The default is **Find what you need here.**.
`Maximum Suggestions to Display`	Maximum number of suggested articles and discussions to show. The default is 6.
Empty State Content	Click to expand.
`Topic ID`	Use the dropdown menu to elect a topic to show before community users start entering text in the Contact Support Form component. If you leave this field empty, the component shows trending topics.
Content Types	Click to expand.
`Articles`	Select to include articles in suggestions.
`Discussions`	Select to include discussions in suggestions.
Deflection Metrics	Click to expand. You can view the data that's gathered in this section in the Case Deflection Dashboard. This dashboard is available as part of the Salesforce Community Management Package, which you can find on the AppExchange.
`Ask users if they're satisfied with the suggested content`	Let users tell you whether the suggested articles and discussions helped solve their case.
`Satisfaction Prompt`	Ask users if they're satisfied with suggestions. Default text is: **Did the content help solve your issue?**
`Ask follow-up prompt`	Ask a follow-up question, provided users answer the first question.
`Follow-Up Prompt`	Enter the text to use for your follow-up question. Default text is: **Stop creating your case?**
`Redirect URL for Abandoned Cases`	The URL of the page you'd like users to see if they abandon their case.
`Confirmation Message`	Default text is: **Got it!**

Example: Sample Case Deflection component:



SEE ALSO:

- Ask Button
- Contact Support & Ask Buttons

Case Comments Publisher

Use the Case Comments Publisher component to let customers and agents collaborate using comments on cases. Your customers can open cases, post comments, upload attachments, and check the status of their cases from any of their devices.

Note: Before Spring '16, this component was named Case Publisher.

The component provides a chronological, filterable list of comments your customers and agents have had within the context of a case. It includes case activities, internal and external comments, attachments, and status changes. When authenticated users add a comment to a case, they can add a file to the case as an attachment. So when a customer creates a case using a mobile phone, they can take a picture with their phone's camera and attach it to the case.

Note: Users must have edit access on cases in order attach files with the Case Comments Publisher component.

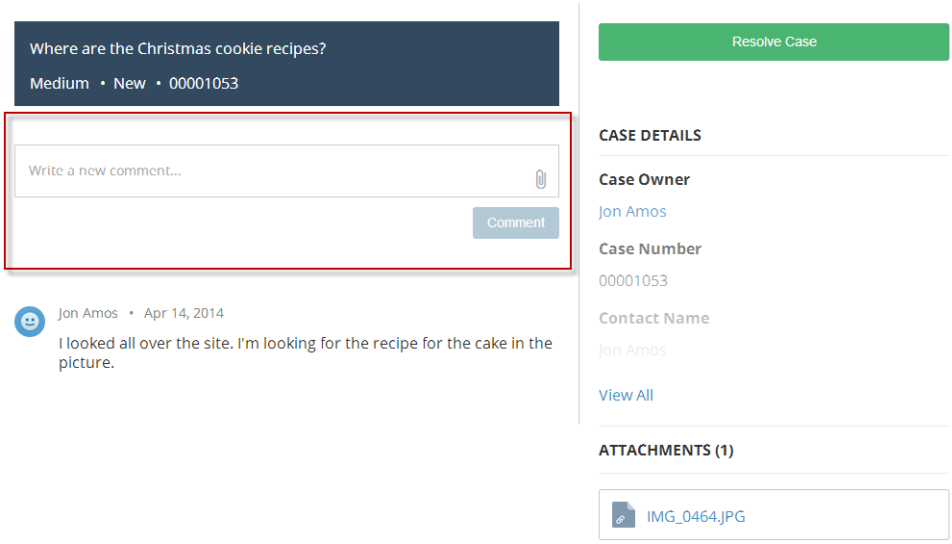
By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

1. Select the **Case Comments Publisher** component in the page you're configuring.
2. To configure properties for the component, select the Properties pane:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
`Publisher Placeholder Text`	Enter the text that appears in the search bar. The default value is **Write a new comment...**.
`Mobile Header Text`	Enter the text that appears as the header for mobile users. Mobile and tablet see the text as the header for the comment text area.

Property	Details
`Can Attach Files`	Lets users attach a file to the comment.
`Post Button Label`	Enter the text for the button that submits the case or comment.

Example: Sample Case Comments Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Detail

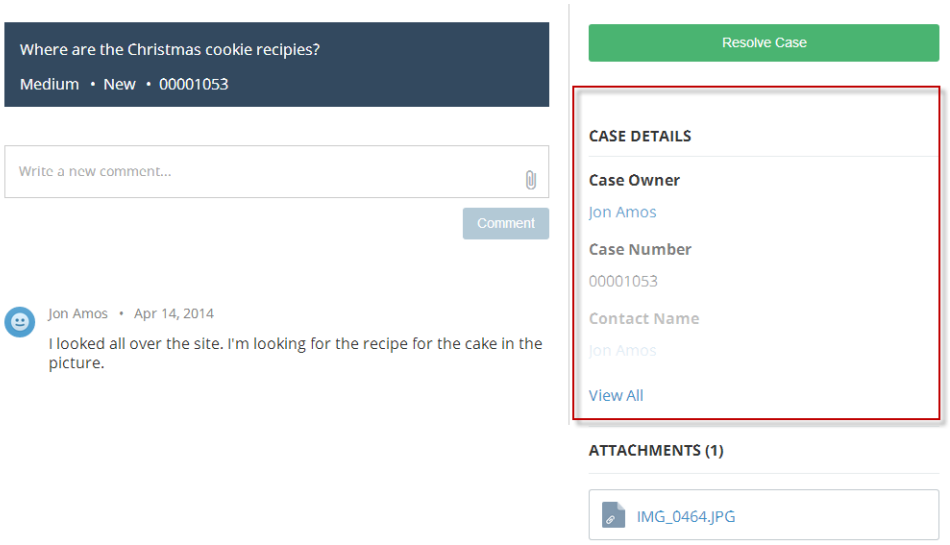
The Case Detail component lets users see all of the details of their case in a collapsible section.

1. Select the **Case Detail** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

Example: Sample Case Detail component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Feed

The Case Feed component shows a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments.

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

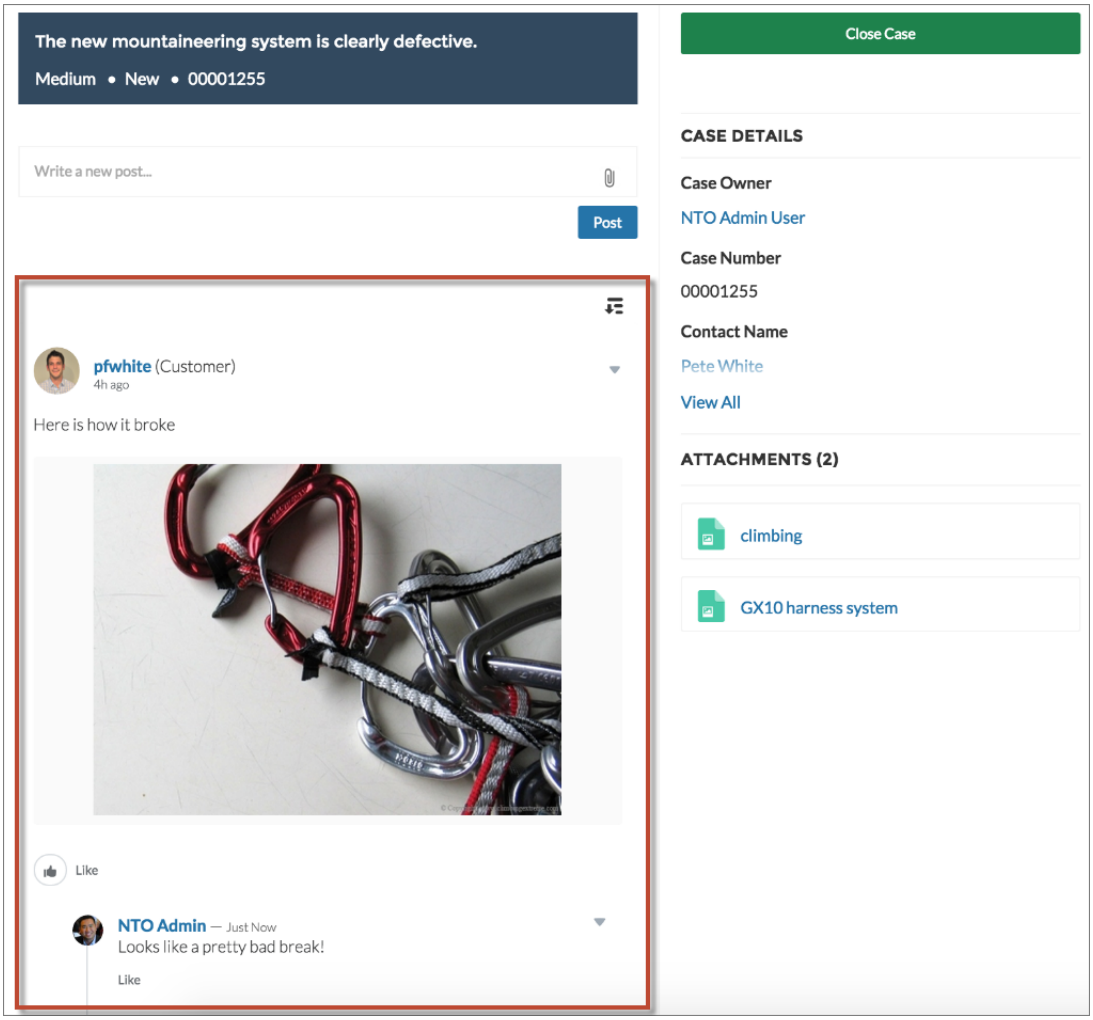
Comments and attachments on posts appear inline below the post for desktop and tablet users, and attachments are also shown separately in the Attachments component.

Important: Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up the Community Case Feed.

1. Select the Case Feed component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Case ID	Enter this value: `{!recordId}`

Example: Sample Case Feed component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case Feed Publisher

The Case Feed Publisher component lets customers create Chatter posts on cases and upload attachments from any of their devices.

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

Attachments are shown in the Attachments component. By default, users can attach any supported file type that is 2 GB or less.

Important:

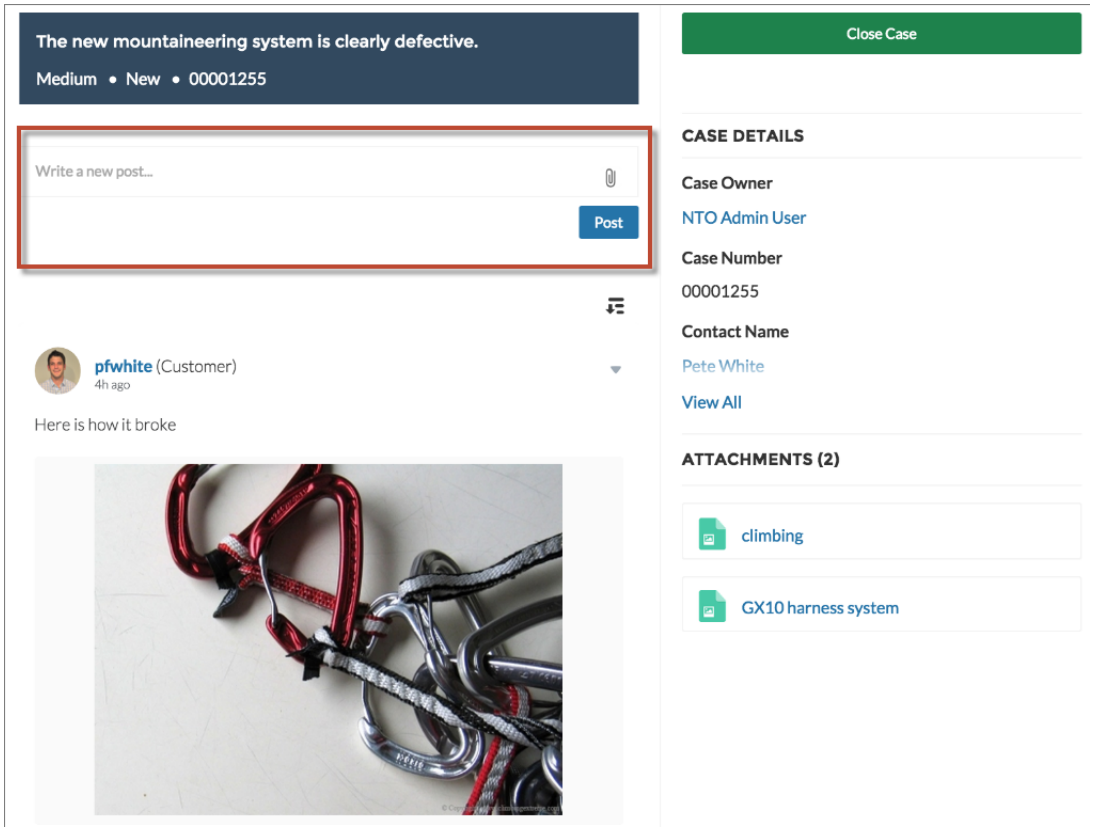
- Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up the Community Case Feed.
- If an agent posts on a customer's case within a community built using the Customer Service template, the post is only visible to other internal users. To ensure that customers see agent posts, agents should use the Community action in the console.

1. Select the Case Feed Publisher component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Case ID	Enter this value: `{!recordId}`
Publisher Placeholder Text	Text that appears in the search bar. The default value is **Write a new post...**.
Mobile Header Text	Text that appears as the header for mobile users. Mobile and tablet users see the text as the header for the post text area.
Can Attach Files	Lets users attach a file to the post.
Post Button Label	Text for the button that submits the post.

Note: Before Spring '16, this component was named Case Chatter Publisher.

Example: Sample Case Feed Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

Case List

The Case List component displays a list of the user's cases. Only authenticated users can see a list of the cases that they've created.

Note: This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in communities.

You can select the fields to display by editing the Cases list view.

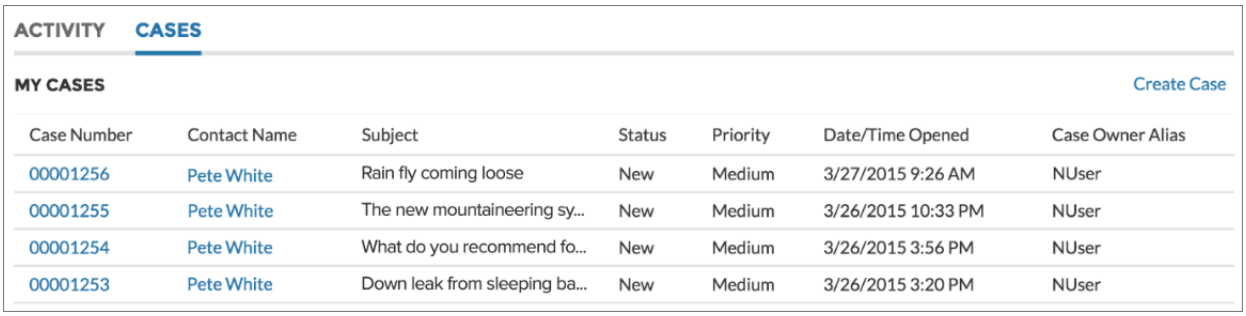
Note: The name of the first column in Case List displays as the case title on mobile devices. We recommend using `Subject` as the first column so mobile users can easily scan their cases. To change the column order in the Case List component, edit the case list view that your organization has assigned to it. By default, the Case List component uses the All Open Cases list view from Salesforce.

1. Select the **Case List** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Case Filter Name or ID`	Enter the name of the list view that displays cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Header Title`	Enter the text for the label that appears at the top of the list of cases. The default for this field is `My Cases`.
`Create Case Label`	Enter the text you'd like to display on the button that users can click to create a case. The default text is `Create Case`.

Note: Before Spring '16, this component was named My Cases.

Example: Sample Case List component:



SEE ALSO:

Which Components Can I Use with Each Template?

Category Filter

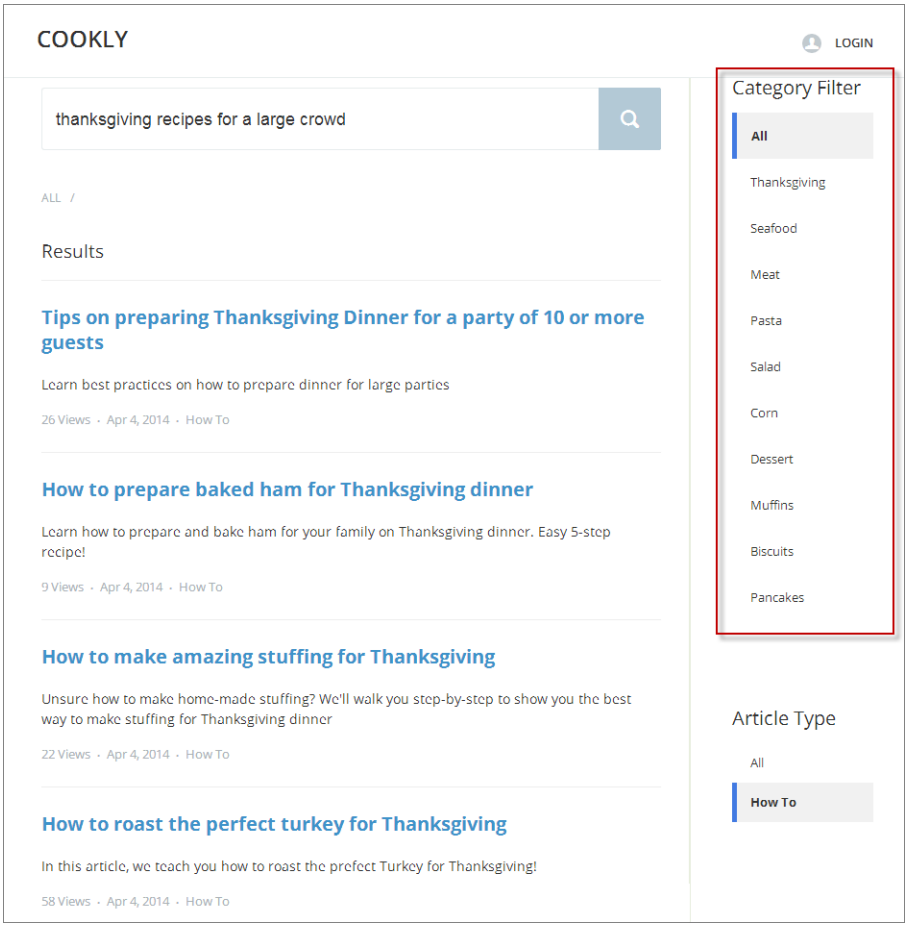
The Category Filter component lets users filter the article list based on selected data categories so that they can see articles from those categories only.

Users can filter the Article View by selecting one or more data categories.

1. Select the **Category Filter** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.

Example: Sample Category Filter component:



SEE ALSO:

Which Components Can I Use with Each Template?

Category Navigation

The Category Navigation component shows a list of child categories for a selected parent category.

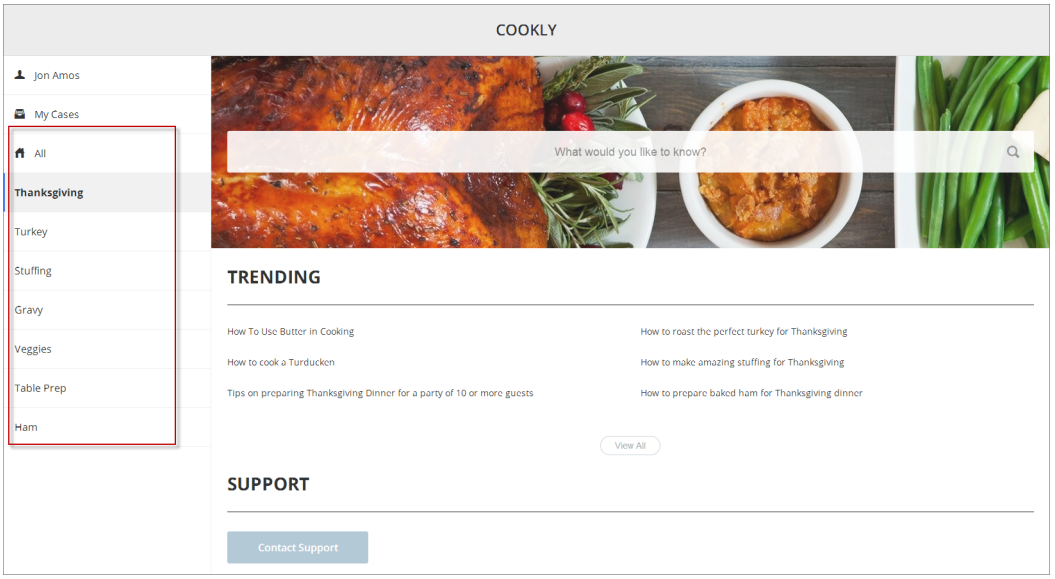
Users can click the child category to view the articles that are associated with it. For long lists of categories, users can view all of the categories and collapse the list to show fewer categories.

1. Select the **Category Navigation** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.

Property	Details
`Auto-Collapse`	Select the checkbox to have the category navigation component collapse automatically after a category is selected.

Example: Sample Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Template?

CMS Collection (Beta)

The CMS Collection component displays JSON content from a content management system (CMS).

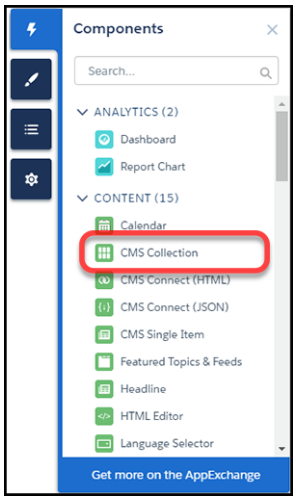
The CMS Collection component can be added to a page multiple times and can use collection sources from native content or Salesforce CRM. You can add the CMS Collection component to pages before creating your first collection, but until a collection is associated with the component you won't have access to the layout options. You can create collections of content in Content Management

1. Add a **CMS Collection** component to your page.

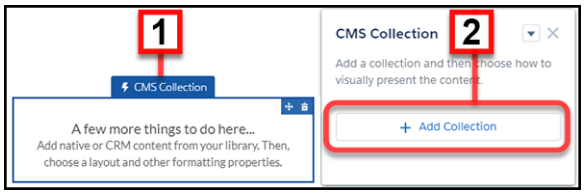
USER PERMISSIONS

To create, customize, or publish a community:

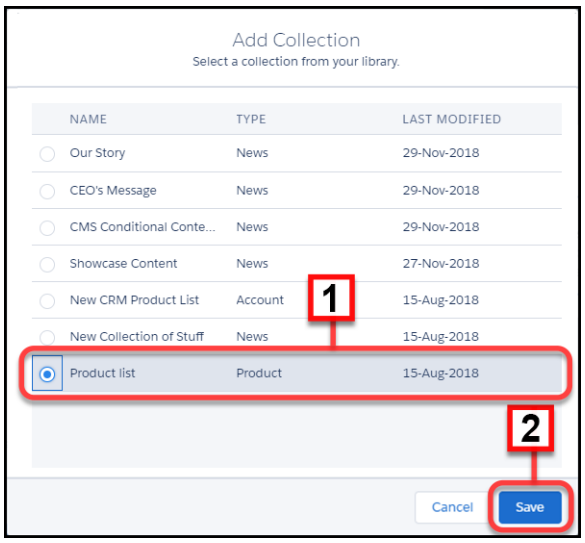
- Create and Set Up Communities AND View Setup and Configuration



2. Click the component (1) to open the options menu. Then click **+ Add Content** (2) to select an available collection.

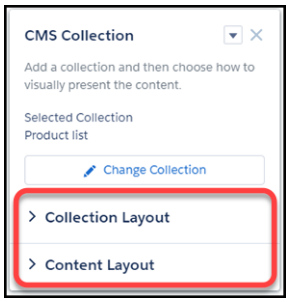


3. Choose a collection from your library and click **Save**.



Note: The Type column lets you know the source of a collection. **News** is any collection comprised of CMS content. When you see an object name, such as **Account** or **Product**, that indicates a Salesforce CRM collection.

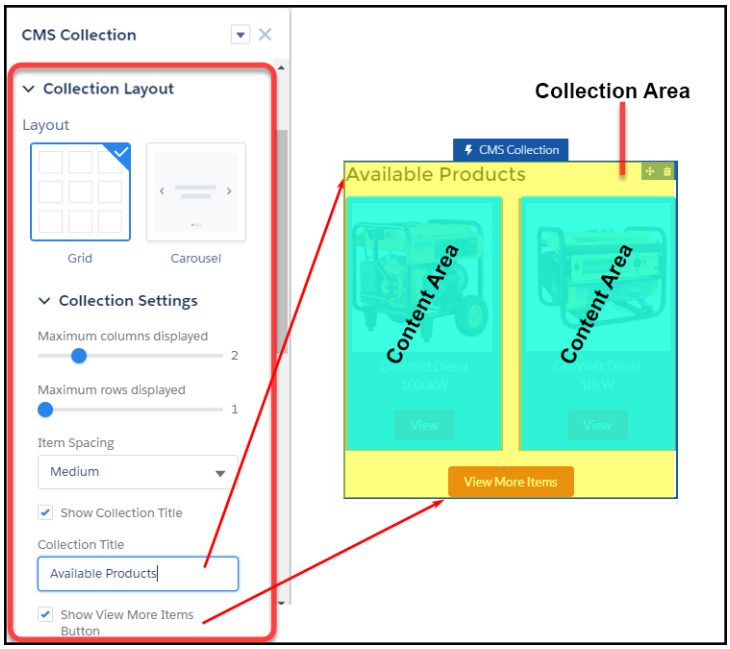
4. Now that you have some content feeding into the component, you have layout options to work with.

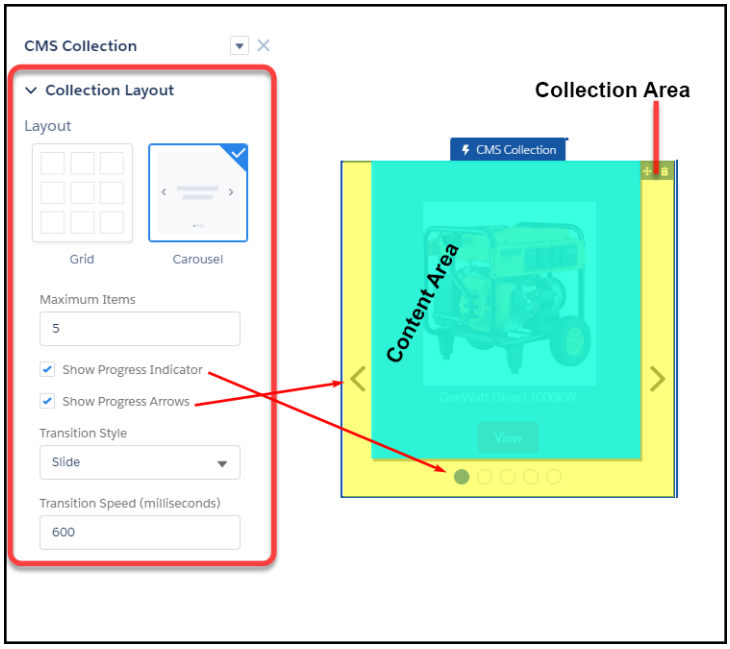


There are two levels of layout.

- **Collection Layout** determines how the individual content items are displayed on the page within the component. (As a 3x3 grid or as a carousel, for instance.)
- **Content Layout** options control how the content from an individual item is displayed within its box in the collection layout. For instance, how images are presented or how text is laid out for each individual item.

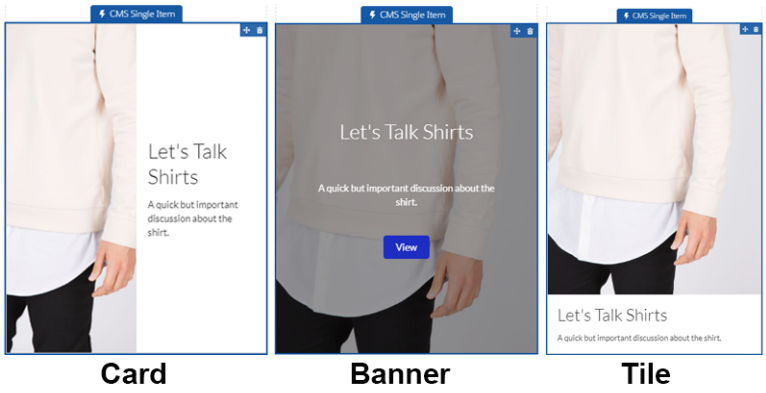
5. First choose how the collection displays by selecting and adjusting the **Collection Layout** options.



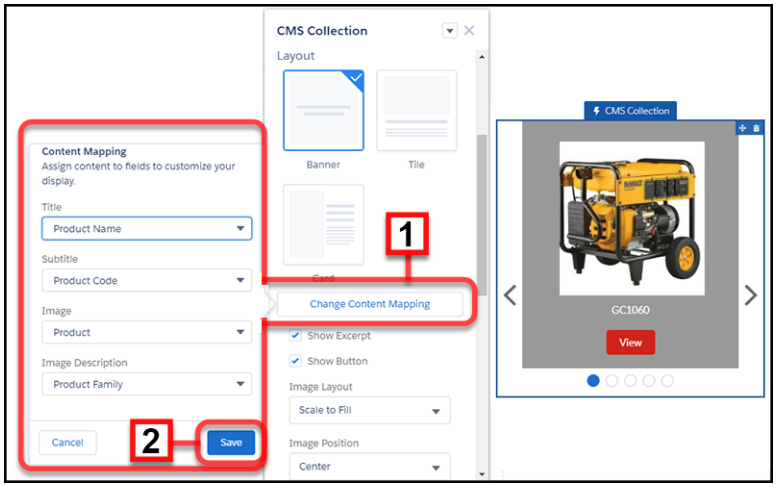


To see these layouts in action, preview your community.

6. Now choose the **Content Layout**. Most of the options will feel familiar. For instance, you have several content layout options such as Card, Banner, or Tile.



When using a Salesforce CRM collection, the fields from the objects are mapped into the content fields, such as Title and Image. Communities makes its best guess for you, but you can remap the fields to populate your component differently. Click **Change Content Mapping** (1) and then choose the available object field from the dropdown. Click **Save** (2) to apply the changes.



For Salesforce CRM content, the optional **View** links to the record detail page for the content item associated with the button. For CMS content it links to the News Detail page, which can be configured separately.

SEE ALSO:

Which Components Can I Use with Each Template?

CMS Connect (HTML)

The CMS Connect (HTML) component lets you display HTML content from a content management system (CMS). After setting up a connection in your CMS Connect workspace, drag a CMS Connect component on a page to render content from that connection.

Before using the CMS Connect (HTML) component, set up a connection on page 528 in your CMS Connect workspace. Then choose **Use in Builder** for the connection you want to use.

1. From the Component panel in Community Builder, drag a CMS Connect component to the page and location where you want to display it.
2. Select the component. In the property editor, configure its properties.

Property	Details
`CMS Source`	Select the CMS source that contains the content to display. If no sources are listed, click **Manage Connections** to set one up.
`Component Path`	Enter the path to the component to display. If the connection has a root path, enter only the component part of the path. For example, if you entered `content/capricorn` for the

Property	Details
	root path, enter only `banner1` for the component path. If your connection doesn't have a root path, enter the full path for the component.

CMS Connect (JSON)

The CMS Connect (JSON) component displays JSON content from a content management system (CMS).

Before using the CMS Connect (JSON) component, set up a connection on page 528 in your CMS Connect workspace. The connection includes the server URL and paths to your JSON information. It also defines content lists and content items that you want to display. Then choose **Use in Builder** for the connection you want to use.

1. In Community Builder, drag a CMS Connect (JSON) component from the Components panel to the location on the page where you want to display it.
2. Using the property editor, configure the component's properties.

Property	Details
`CMS Source`	Select the CMS source containing the content that you want to display. If no sources are listed, go to your CMS Connect workspace and define content items and content lists for the connection.
`JSON Content`	Select the JSON content. Choose from the content items and content lists that you set up in the connection. In the property editor, the fields that you see depend on what you select. For example, if you select a content list, you see the layout options for a list.
`Component Path`	Applies only for content items. Enter the path to the component to display. For example, enter the ID of a blog.
`Content List Layout`	Choose a layout for your content list. Currently, the only option is Grid. Define the grid layout using the Items Per Page and Columns properties.
`Content List Item Layout`	Choose a layout for items in your content list. Currently, the only option is Card. To specify card properties (Title, Author, and so on), enter a JSON expression or value. For example, enter `@key`, `6`, or `{!id}`.
`Content Item Layout`	Choose a layout for your content item. Currently, the only option is Detail. To specify detail properties (Title, Author, and so on), enter a JSON expression or value.
`Items Per Page`	Enter the number of content items that display on each page.

Property	Details
`Columns`	Enter the number of columns of content items that display on desktops and tablets. Phones display content items in a single column.
`Title`	Enter a JSON expression or text for the title, such as `@title`.
`Author`	Enter a JSON expression or text for the author, such as `@author/name`.
`Published On`	Enter a JSON expression or text in ISO format for the publish date. For example, `@date` or YYYY-MM-DDTHH:mm:ss.sssZ.
`Body`	Enter a JSON expression or text for the content body, such as `@content`.
`Image Source`	Enter a JSON expression for the image source of the content item, such as `@featured_image`.
`Navigation` section	Set up the navigation link for content items in your content list.
`Link Text`	Enter the link text to display on your community page. The default is Read More.
`Type`	Select whether the link points to a generated page or an external URL with the content items in your content list.
`Page`	Displays the name of the generated detail page. The default name reflects the CMS source and content type name for your connection. To change the default name, URL, or layout of this page, change the page properties using the Pages menu.
`URL`	Enter the fully qualified URL to the content. Note: You can also specify JSON expressions, such as @link.

SEE ALSO:

Reuse Content with CMS Connect JSON

Add CMS Connect (JSON) Components to Your Community Pages

Example: Connect JSON Content to Your Community

CMS Single Item (Beta)

The CMS Single Item component displays native content items created and maintained in Content Management.

Before using the CMS Single Item component, create native content in CMS for Community Cloud. You can add the component to your site without a content source but will be unable to configure it until you have linked it to content.

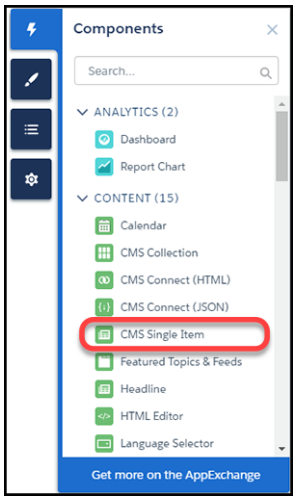
Note: You can only add native content that has been published from the native content form. If you have a published piece of content and also have a draft version, the latest **published** version is what is available to select.

USER PERMISSIONS

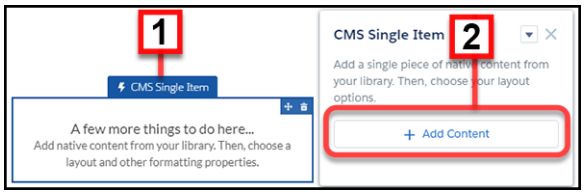
To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

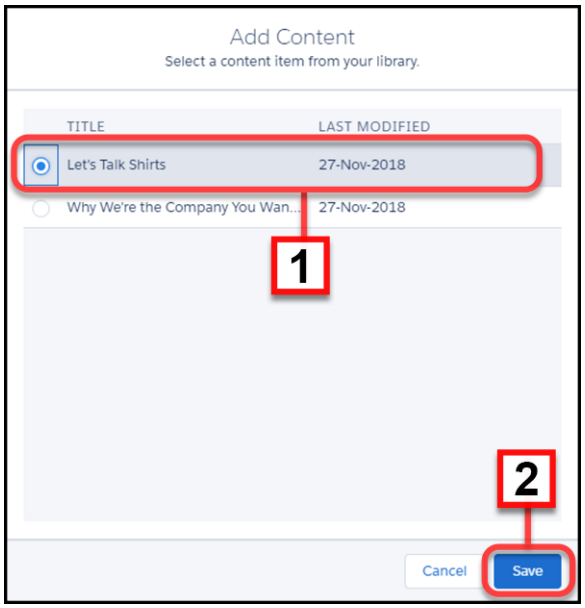
1. Open Community Builder.
2. Select and drag the **CMS Single Item** component to your page.



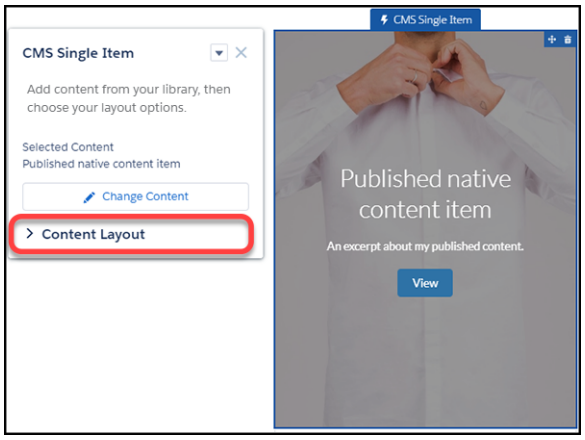
3. Click the component (1) to open the options menu. Then click **+ Add Content** (2) to select a piece of available CMS content as your source.



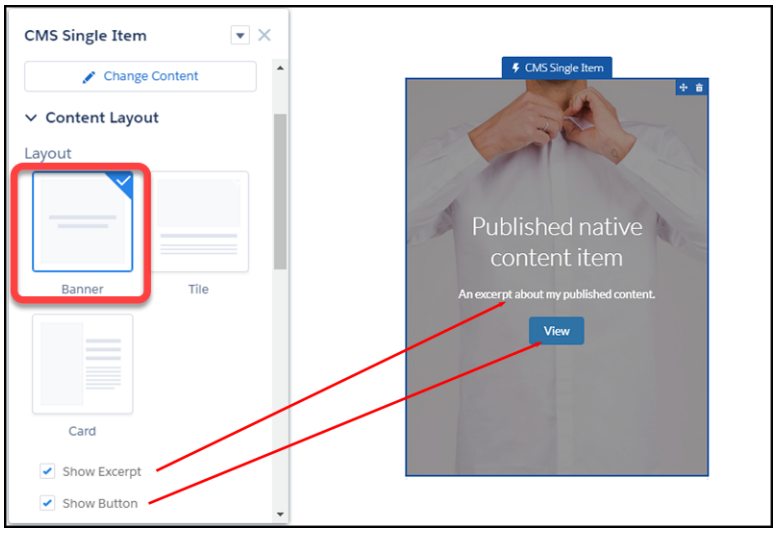
4. From the available content (content that has been published), select the source (1) and click **Save** (2).



5. The content populates the component and now you can choose how to present its contents by expanding **Content Layout**.

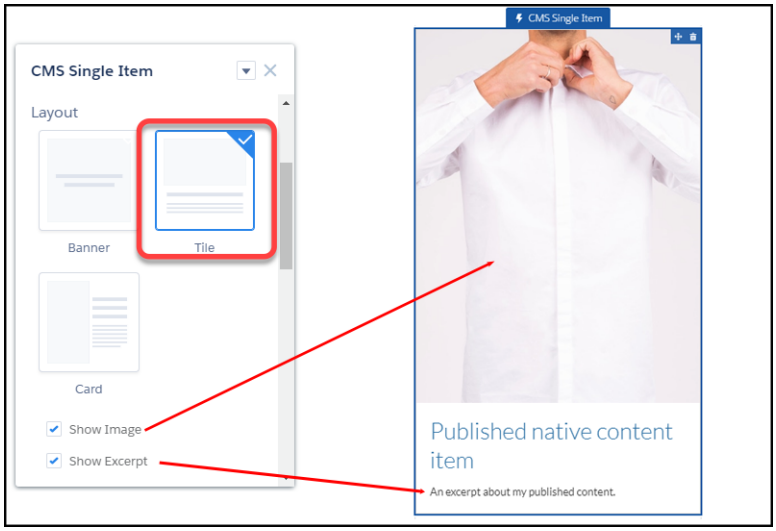


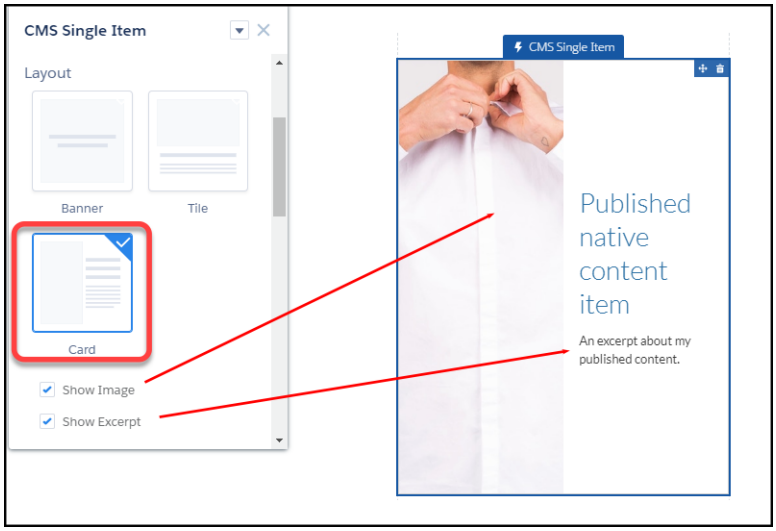
6. There are many familiar layout options for font size, image position, and overlays. There are also a few that may not be as familiar.



You can choose the overall configuration of the content by selecting one of the main layouts, each of which has its own options. For instance, you can choose to overlay the banner image with the excerpt you entered in the CMS Content form. You can also add a button, with an editable label, that opens the full piece of content on the News Detail page when clicked.

Tile and Card layouts have similar options, but use the content fields a little differently. You may have noticed there is no **Show Button** option available for these layouts. For Tile and Card, the title text of the content becomes a link to the detail page automatically.





7. Publish your community to make the changes live.

SEE ALSO:

Which Components Can I Use with Each Template?

CMS Single Item (Detail) (Beta)

The CMS Single Item (Detail) component supports CMS for Communities as the common detail component for material displayed by all CMS Single Item components.

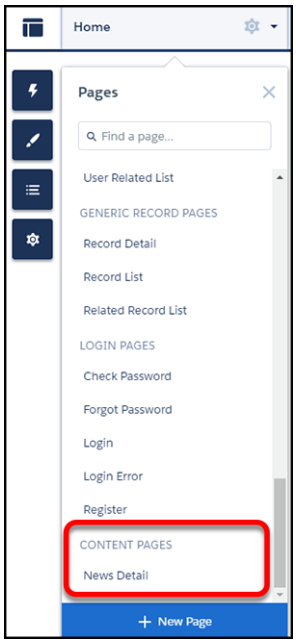
CMS Single Item (Detail) can only be added to the News Detail page.

1. From the Pages menu, select **News Detail**.

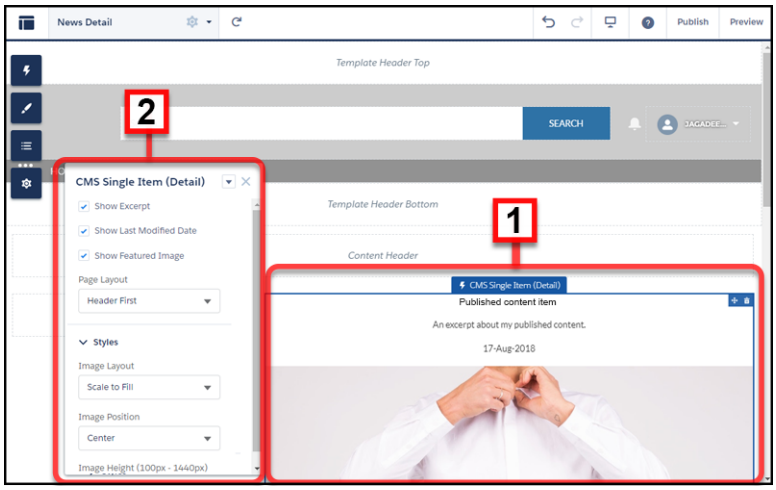
USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



2. Select the **CMS Single Item (Detail)** (1) component to open its options menu (2).



The CMS Single Item (Detail) options allow you to expose or hide various fields from the CMS content form. In addition, you can choose to style the content to meet your needs and guidelines.

The CMS Single Item (Detail) component is a general container for all CMS content and can only be used on the News Detail page. You can adjust the layout and content of the News Detail page as you do other pages in your community.

SEE ALSO:

Which Components Can I Use with Each Template?

Community Calendars

View your events and others' calendars from your Lightning community on your desktop or mobile device.

Your admin can configure the calendar to display details in the side panel of the calendar component or they can hide the sidebar. Calendar sidebars are turned on by default and display your "My Events" calendar and other users' calendars that have been shared with you. If your calendar is set up to display the side panel, you can collapse it if you need more space.

Note: There are a few things to keep in mind when using calendars in a community:

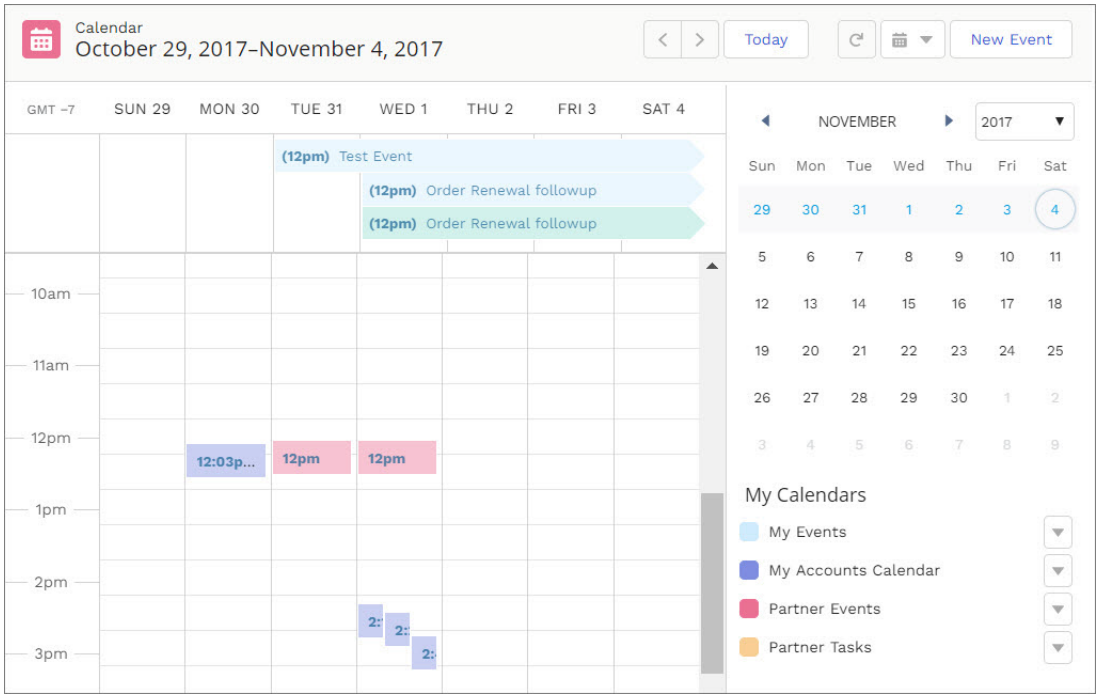
- The option to hide or open the side panel in the Communities Calendar is only available in calendars that have been configured to **Show Calendar Sidebar**.
- Internal users and partners users can add a public calendar to their Other Calendars section.
- Partners can view events, but can't edit them.
- Customer users don't have access to public calendars and events.

You can share your My Events calendars with other team members and add their calendars to your view. If you want to change one of your events, simply drag it to a new time slot.

1. Select the **Calendar** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Show Calendar Sidebar`	Select this option to display the calendar sidebar by default. To work with this item, use the full Salesforce site.
`Show Other Calendars`	Select this option to display calendars that have been added to the user's calendar view. To work with this item, use the full Salesforce site.
`Let Users Create New Calendars`	Turn on this option to create a calendar. To work with this item, use the full Salesforce site.

Example:



Contact Request Button & Flow

Add the Contact Request Button & Flow component to let members click a button to request that customer support get back to them. Members describe the problem and enter their contact details in a popup window. After the request is sent, a support person can review the issue and contact the customer for follow-up and resolution.

Tip: To use this component, create a contact request flow from the Customer Contact Requests page in Setup. When a customer submits a request, a contact request record is created. You can route contact request records using Omni-Channel.

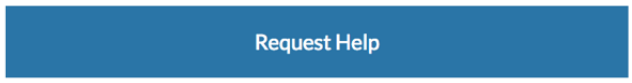
Contact Request works in public communities and communities that require authentication. Make sure that your community users have the Run Flows permission, including your Guest User profile that's used in public communities. Without this permission, members won't see the button to submit contact requests.

1. On the page that you're configuring, select the **Contact Request Button & Flow** component.
2. In the property editor, configure the component properties.

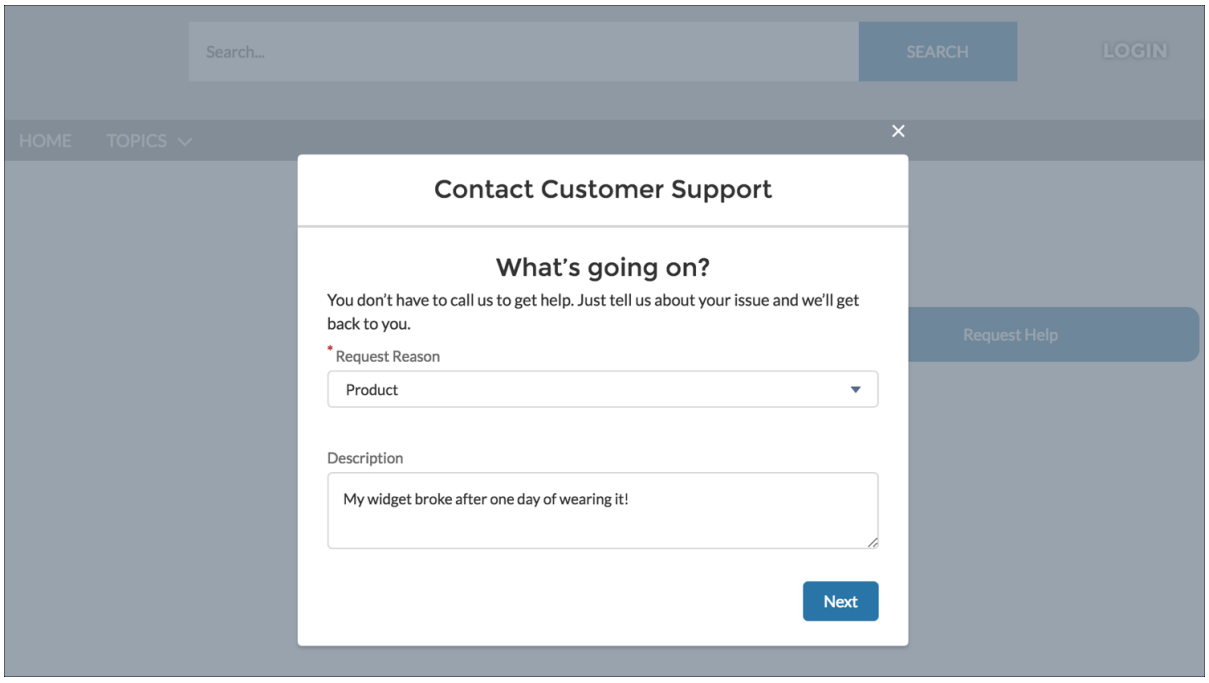
Property	Details
`Button Label`	The text to display on the support request button. The default is Request Help.
`Contact Request Flow`	Select a contact request flow that you created in Setup or in Flow Builder. Only active flows that have the type Contact Request Flow are supported.
`Button Text Color`	Set the color of text to use for the button label. Note: The link icon shows that the current selection comes from colors defined in the community theme.

Property	Details
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Request Button & Flow component.



When a user clicks the button a popup window appears.



SEE ALSO:

Let Customers Request that Support Get Back to Them

Contact Support Button

The Contact Support Button component adds a button that users click to create a case. When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.

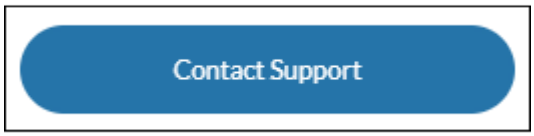
Each button instance supports its own property values. So, if you have two Contact Support buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your community theme so that they all look the same. But each button instance remains unique.

Note: Guest users can't attach files when creating a case.

1. Select the **Contact Support Button** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Button Label`	The text to show on the button that users click to create a case. The default text is `Contact Support`.
`Button Text Color`	Set the color of text to use for the button label. Note: The link icon shows that the current selection comes from colors defined in the community theme.
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Support Button component:



Contact Support & Ask Buttons

The Contact Support & Ask Buttons component adds two buttons to the page. The Contact Support button lets users click a button to create a case. The Ask button lets members ask a question and publish it to the community. All members must be logged in to ask the community a question.

Note: Before Spring '16, this component was named Call to Action.

When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.

Note: Guest users can't attach files when creating a case.

Each button instance supports its own property values. So, if you have two sets of Contact Support & Ask buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your community theme so that they all look the same. But each button instance remains unique.

1. Select the **Contact Support & Ask Buttons** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Header Label`	The text to show at the top of the component.
`Ask Community Label`	The text to show on the Ask button. The default text is `Ask a Question`.
`Contact Support Label`	The text to show on the Contact Support button. The default text is `Contact Support`.
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher and to allow members to add topics.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state.
`Button Text Color`	Set the color of button text to use when the button is inactive. Note: The link icon shows that the current selection comes from colors defined in the community theme.
`Button Text Hover Color`	Set the color of text to use when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.

Property	Details
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button border.
`Suggest questions`	Select to show questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that solicits information about their satisfaction with the content provided to them when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles you provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.
`Follow-Up Prompt`	Enter the follow-up question that you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*

Example: Sample Contact Support & Ask Buttons component:

SEE ALSO:

Which Components Can I Use with Each Template?

Case Deflection

Contact Support Form

The Contact Support Form allows guest and authenticated users to create cases from a community. It works in conjunction with the Case Deflection component to help community members find articles and discussions to answer questions as text is being entered into the form.

If you built your community before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing community to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your community's case deflection.

Check out this topic if you want to migrate to the new components.

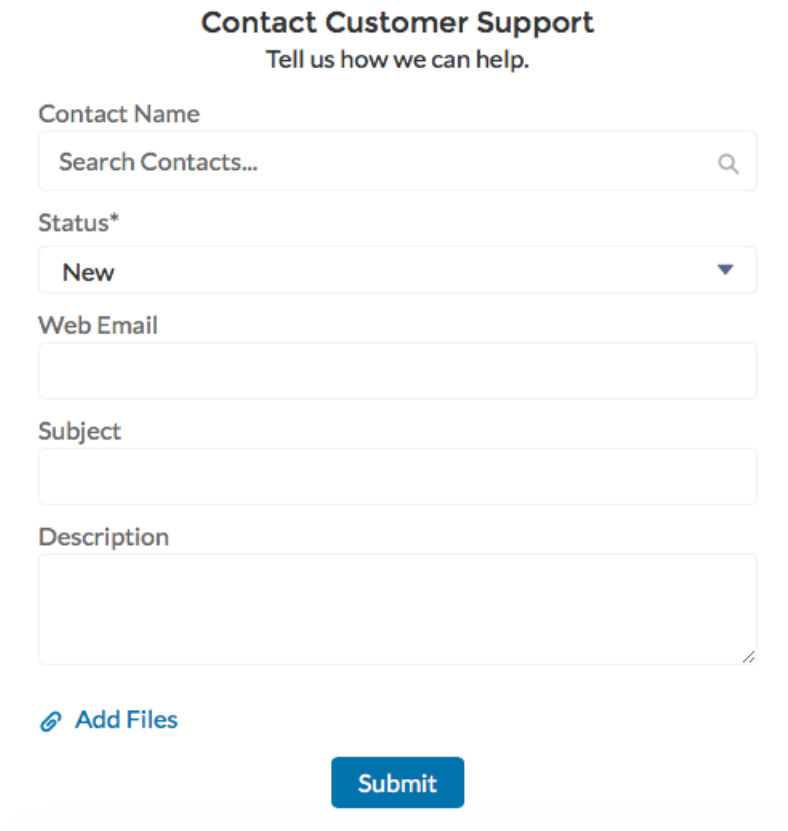
Note: When you configure the case page layout for your community, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

1. Select the **Case Deflection** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand the section with general setting properties.
`Title`	Text that displays at the top of the form customers use to create a case. The default is **Contact Customer Support**.
`Subtitle`	Subtitle at the top of the form customers use to create a case. The default is **Tell us how we can help**.
Authenticated Users	Click to expand.
`Global Action`	A global action that allows users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for authenticated users`	Link to the area in Salesforce Setup where you can create global actions.

Property	Details
`Attach files`	Select to allow users to attach files to their cases. They can upload up to 10 files.
`File Upload Button Label`	Label for the button to allow customers to upload files. Default text is *`Upload File`*.
Guest Users	Click to expand.
`Global Action`	A global action that allows guest users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for guest users`	Link to the area in Salesforce Setup where you can configure global actions for guest users.
Confirmation Text	Click to expand.
`Confirmation Title`	The title at the top of the page confirming that a case was created. Default text is **Your case was created.**
`Confirmation Subtitle`	More information under the confirmation title, after a case was created. Default text is **We'll get back to you soon.**
`Case Summary`	Shows the case subject and case number for the user's future reference.
`Show Call to Action button`	Select this option to have folks take a follow-up action after filing a case.
`Call to Action`	The URL of the site you'd like your users to see after filing a case.
`Call to Action Text`	Call to action text label, based on what you'd like your users to do.
`Call to Action Button Text`	Text label for the call to action button.

Example: Sample Contact Support Form component:



Create Case Form

The Create Case Form component searches text as it's being entered into a case and displays articles based on the typed text. If users don't see an answer, they can contact support for help. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

Before Spring '16, this component was named Case Creation.

Note: When you configure the case page layout for your community, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

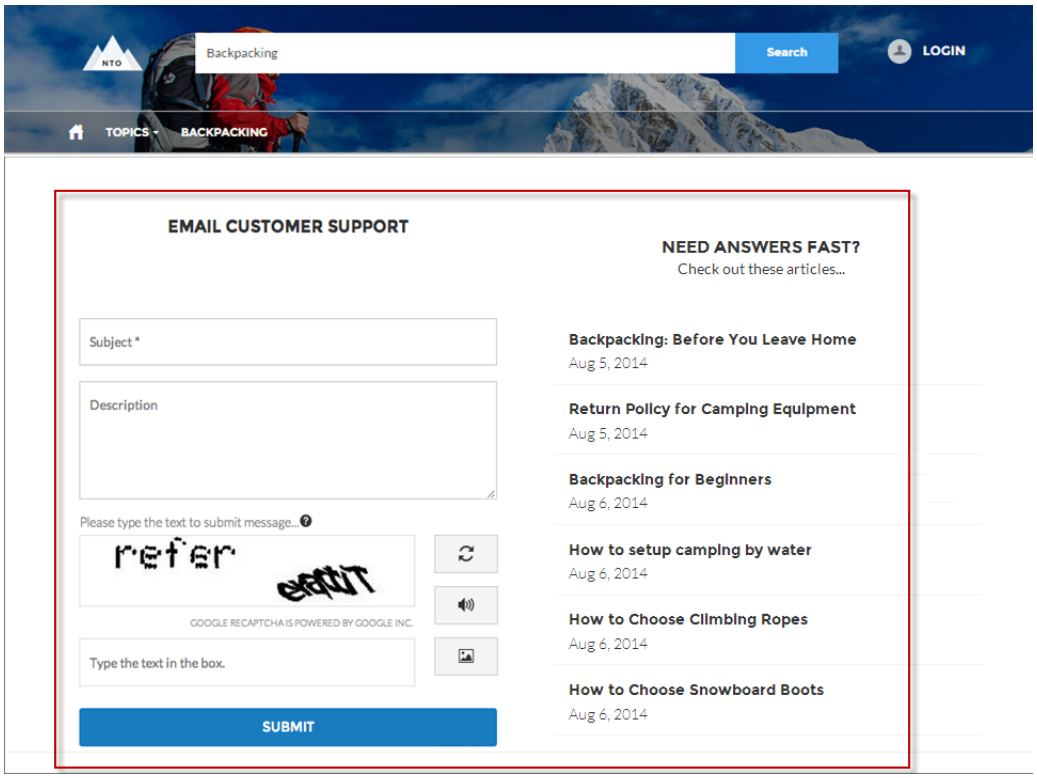
1. Select the **Create Case Form** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand the section with general setting properties.
`Attach Files`	Lets authenticated users attach a file to the comment in the case. Your organization's settings control the limits for file sizes. If you enable Web-to-Case to let guest users create cases, keep in mind that guest users can't attach files to a case.

Property	Details
`Header Title`	Text that displays at the top of the page customers use to create a case. The default is Email Customer Support.
`Confirmation Message Title`	Text that appears as the title of the message confirming that the case has been created. The default is: Your request was submitted successfully.
`Confirmation Message Description`	Text that appears as the body of the message confirming that the case has been created. For example, You'll hear back from us soon.
Actions in the Publisher	Click to expand the section with action properties.
`Signed-In User Case Action`	The name of the action that creates cases for authenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout. The NewCase action is a default in your Salesforce org.
`Guest User Case Action`	The name of the action that creates cases for unauthenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout.
Case Deflection	Click to expand the section with case deflection properties.
`Use Case Text to Suggest Articles`	Uses the text users type in the case title and description fields to suggest articles in the deflection area of the page. Article deflection appears only when you've implemented Salesforce Knowledge in your org.
`Number of Articles`	Number of articles that display in the component.
`Top-Level Category`	Top-level data category for template-driven communities using data categories. This is the data category that articles used for deflection come from.
Category Group name for article deflection	Data category group name for template-driven communities using data categories.
`Deflection Banner Text`	Text that displays as the title of the deflection area of the page. The default is Need Answers Fast?.
`Deflection Text`	Text that displays as the subtitle in the deflection area of the page.
`Mobile-Only Deflection Text`	Text that displays in the deflection area for users of mobile devices.
reCAPTCHA Settings	Click to expand the section with reCAPTCHA settings. **Important:** Google no longer supports reCAPTCHA v1, which is the only version currently available in communities. In order to use reCAPTCHA v2 and above in communities, use a custom Lightning component.
`reCAPTCHA for Guest Case Creation`	Adds the reCAPTCHA widget to your page. The reCAPTCHA widget requires guest users to complete a text field successfully before they can create a case.
`Secret Key for reCAPTCHA`	Enter the key that you received when you registered for the service.

Property	Details
`Site Key for reCAPTCHA`	Enter the key that you received when you registered for the service. Note: Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

Example: Sample Create Case Form component:



SEE ALSO:

Which Components Can I Use with Each Template?

Migrate to the Contact Support Form and Case Deflection Components

If you built your community before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing community to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your community's case deflection.

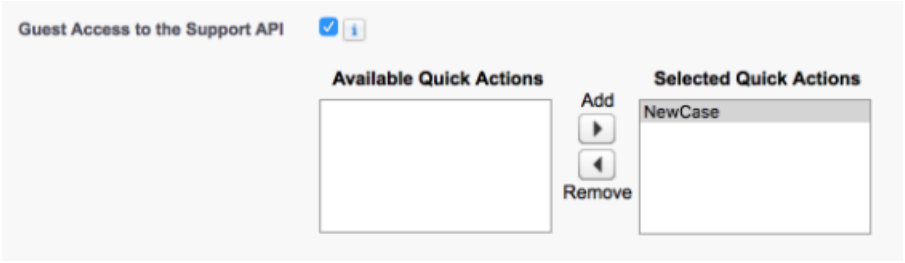
Replace the Case Create Form component with the Contact Support Form and Case Deflection components using the following steps.

Note: Enable Web-to-Case in your org if it's not already enabled.

1. Create a new page variation you can use for case deflection. In the Customer Service, make a variation of the Contact Support page. In the Customer Account Portal template, make a variation of the Contact Us page. We recommend the 2-column, 1:1 ratio layout.
2. Drag the Contact Support Form and Case Deflection components on the page. Configure the component properties.

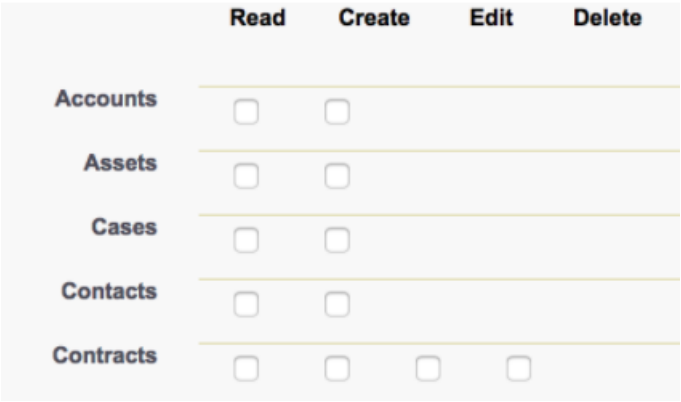
   Note: One of the properties on the Contact Support Form component is the global action used to create cases. Create new global actions in Salesforce Setup. For a global action to be used in the Contact Support Form component, it must be a **Create a Record** action type with the case object as the target.

3. Enable **Guest Access to the Support API**, and whitelist the global actions you want to use.
   a. In Salesforce Setup, enter `Sites` in the `Quick Find` box and select **Sites**.
   b. Select the **Guest Access to the Support API** checkbox to enable it.
   c. Add your global actions to the **Selected Quick Actions** box.



   d. Click **Save**.

4. Configure your community's guest user profile. Disable access to object permissions for guest users.



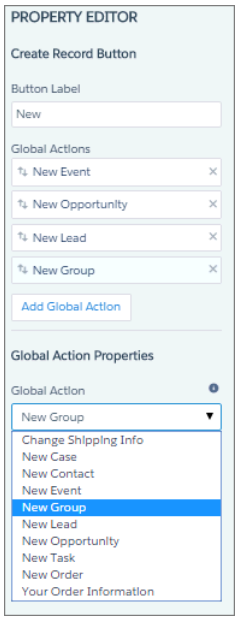
   Note: Your guest users could need object permissions for custom objects, or other functionality in your community. Test your implementation so you have the best object permission configuration for your community.

Create Record Button

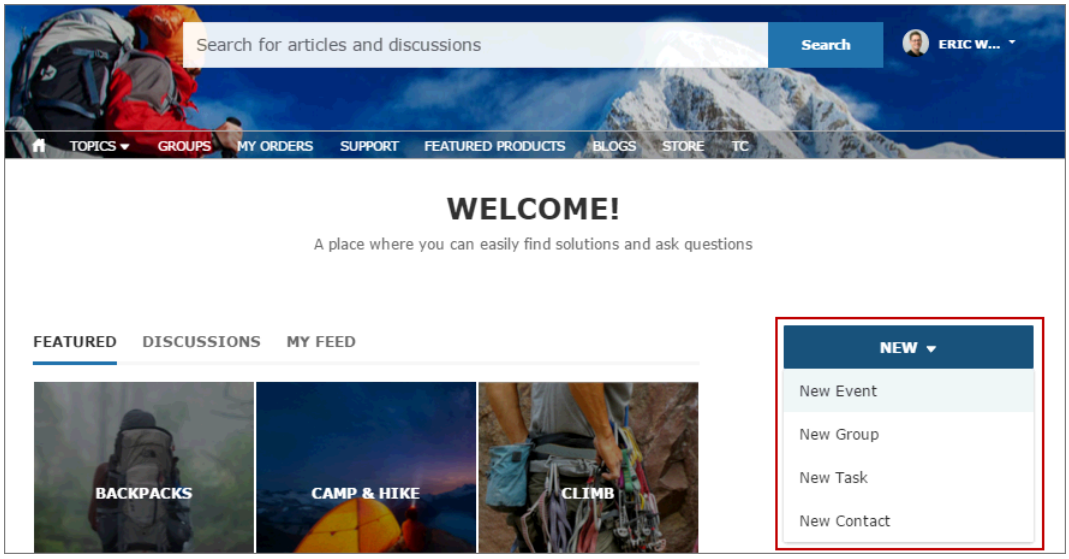
Use the Create Record Button component to allow community members to create records using global actions.

This component relies on the global actions defined in your org by the administrator. If you associate more than one action with this button, it acts like a drop-down list. When a community member selects an action from the list, the Create Record page dynamically loads the appropriate action layout for that action using the Create Record Form component.

1. Add the **Create Record Button** component to a page or select it on the page you're configuring. For example, you could add this to the Home page to make it easy for community members to find.
2. Click **Add Global Action** to add an action to the Global Actions list.
3. Select each action and modify its type and public availability in the Global Action Properties section below.
   - Select the global action type to be associated with each action in the Global Actions list.
   - Select Publicly Accessible to make that action available for guest users in the community.



Example: Sample Create Record Button component on a community home page.



Create Record Form

The Create Record Form component displays the action layout when a user clicks an action from the Create Record button.

When a community member clicks an action from the Create Record button in your community, they're redirected to the Create Record page, which uses the Create Record Form component to display the fields in the associated global action layout. The page and component automatically pick up the global action layout defined in Setup based on the clicked action and the Action Name property is automatically populated. No additional configuration is required.

Example: Sample Create Record Form component.

Custom Lightning Components

Incorporate custom Lightning components in your community design in Community Builder.

Note: As of API version 45.0, you can build Lightning components using two programming models: Lightning Web Components, and the original model, Aura Components.

To develop custom Aura components for your community:

- Implement each component from the Developer Console as shown in this example:

```
<aura:component
implements="forceCommunity:availableForAllPageTypes"
access="global">
```

- To make the component's properties editable in Community Builder, include a design resource named `componentName.design` with your Lightning component bundle.

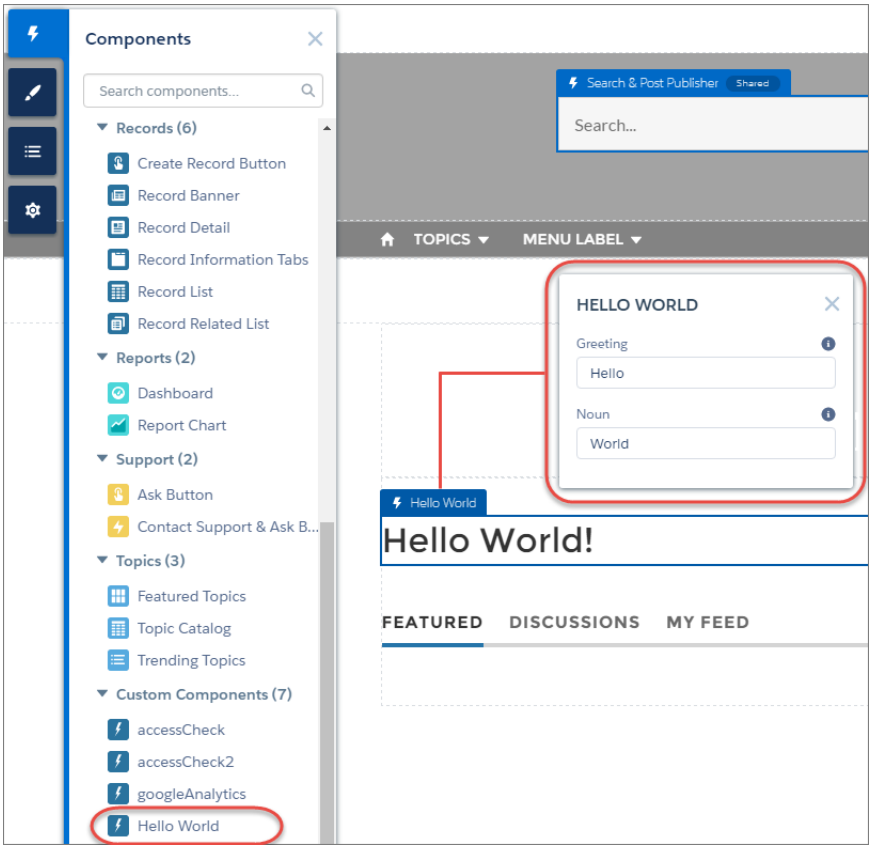
  Note: See *Lightning Communities Developer Guide*.

To develop custom Lightning web components for your community, see *Lightning Web Components Developer Guide: Configure a Component for Lightning Communities*.

Custom Lightning components configured for Communities behave just like standard community template components. Drag and drop the component to the page canvas. To edit its properties, select the component on the page canvas, and then enter changes in the floating component property editor.

Custom components appear in the Components panel along with your template's components.

Example: A custom component added to the page canvas, with properties open in the property editor:



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Customizable User Settings

The Customizable User Settings component displays an authenticated user's username, email address, language, locale, time zone, profile visibility, and email notification settings. You can customize the labels for each of these fields to fit your org's needs.

On the Customizable User Settings component, users can change their language, locale, and time zone so that the community is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the community. Users can also choose to receive email based on events in the community. If users don't want to receive email about events in the community, they can disable email notifications. You have the option of updating the labels on many of these fields.

1. Select the **Customizable User Settings** component on the page.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	Don't update this field. The system supplies this value.
`Hide the Connected Sources tab`	Prevents the Connected Sources tab from appearing on the Customizable User Settings component.
`Account Details Tab Title`	Customizable text. The label for the Account Details tab. This tab includes account, location, profile visibility, and email notifications section. Default text is **Account Details**.
`Connected Sources Tab Title`	Customizable text. The label for the Connected Sources tab. This tab lists external and other data sources to which the user is connected. Default text is **Connected Sources**.
`User Settings Header`	Customizable text. The label for the settings page. Default text is **My Settings**.
`Account Section Header`	Customizable text. The label for the Account section. This section includes username, password, and email address fields. Default text is **Account**.
`Location Section Header`	Customizable text. The label for the Location section. This section includes language, locale, and time zone fields. Default text is **Location**.
`Hide profile visibility section`	Prevents the Profile Visibility section from appearing on the Customizable User Settings component.
`Profile Visibility Section Header`	Customizable text. The label for the Profile Visibility section. This section includes the option to restrict what others can see on a user's profile page. Default text is **Profile Visibility**.
`Profile Visibility Section Description`	Customizable text. The description of the Profile Visibility section. Default text is **Customize who is able to see what on your profile page**.
`Profile Visibility Section Hint Text`	Customizable text. The hint text that appears when users hover over the help icon next to the description. It defines each visibility level. Default text is **Restricted: Visible to the users who created the site. Members: Visible to logged-in members. Public: Visible to anyone viewing pages, logged in or not.**
`Hide email notifications setting`	Prevents email notifications from appearing in a user's personal Chatter settings.
`Email Notifications Section Header`	Customizable text. The label for the Email Notification section. The section includes options for enabling or disabling all or some email notifications. Default text is **Email Notifications**.

Property	Details
`Email Notifications Section Description`	Customizable text. The description of the section that lists the various actions that send email notifications. Default text is **When email notifications are enabled, email me when someone:**.
`Hide feed and post notifications`	Prevents feed and post notifications from appearing in a user's personal Chatter settings.

Tip: For orgs where Single Sign-On (SSO) is enabled, consider hiding the Change Password link on a user's My Settings page.

a. In Setup, create a permission set, for example *`Single Sign On Link`*.

b. In System permissions, set "Is Single Sign-On Enabled" to *`On`*.

c. Assign the permission set to appropriate users in your org.

The "Change password" page no longer appears on their My Settings page.

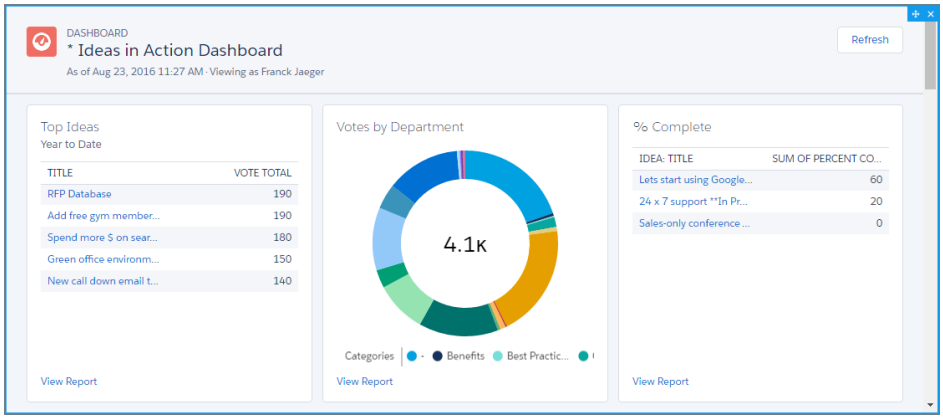
Dashboard

Use the Dashboard component to drag and drop dashboards you set up in your org's public folder to your community's pages.

1. Select the **Dashboard** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Dashboard Name`	Select an available dashboard.
`Height`	Adjust the height of the dashboard. Column width controls the dashboard width.

Example: Sample Dashboard component:



Note:

- Members can't change the dashboard's running user in the community. This view is read only.

- If you apply filters on the Dashboard Detail page, and drill down to a report, the Report Detail page won't show the applied filters.

Dashboard List

The Dashboard List component lets users view dashboards in list form.

The dashboard list can be filtered with these criteria:

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

In addition, users have access to dashboard folders. Folders include:

- Created by Me
- Shared with Me
- All Folders

The Dashboard List component doesn't have any editable properties.

Note: The Dashboard List component can only be used on the Dashboard List page.

Example: Sample Dashboard List component:

[insert image]

Deflection Tracking

The Deflection Tracking component gathers data from users about the deflection content that you provide. Prompt users with a customized set of answers, and capture their feedback in your Salesforce org. Use the Salesforce Case Deflection Reporting Package for Lightning Communities to build reports about the effectiveness of your deflection content. Reports help you plan your content strategy with the support of real data.

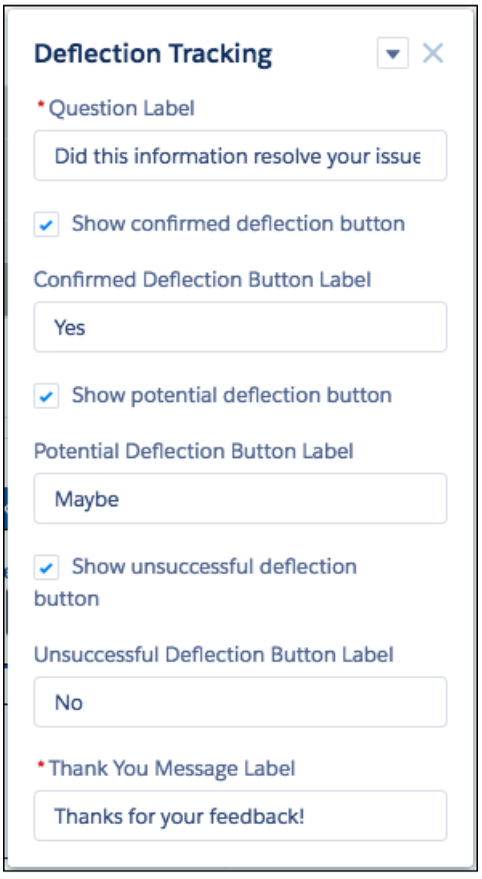
1. Select the **Deflection Tracking** component, and drag it onto any Feed Detail, Question Detail, or Article Detail page. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure properties for the component:

Property	Details
`Question Label`	Enter a prompt that asks users if they're satisfied with the suggested content. Default text is: **Did this information resolve your issue?**.
`Show confirmed deflection button`	Select to include a confirmed deflection button that users click to confirm that the information resolved their issue.
`Confirmed Deflection Button Label`	Enter a label for the confirmed deflection button. Default text is: **Yes**.
`Show potential deflection button`	Select to include a potential deflection button that users click to show that the information possibly resolved their issue.

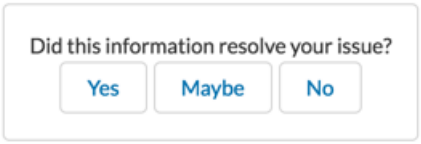
Property	Details
`Potential Deflection Button Label`	Enter a label for the potential deflection button. Default text is: **Maybe**.
`Show unsuccessful deflection button`	Select to include an unsuccessful deflection button that users click to show that the information didn't resolve their issue.
`Unsuccessful Deflection Button Label`	Enter a label for the unsuccessful deflection button. Default text is: **No**.
`Thank You Message Label`	Enter a message thanking the user for their response. Default text is:**Thanks for your feedback!**.

3. Publish the page.

Example: Sample Deflection Tracking component set up in Community Builder:



Sample Deflection Tracking component in viewable user page:



Install the Salesforce Case Deflection Reporting Package to see how well the Deflection Tracking component actually deflects cases from being created. Use the Community Case Deflection Metrics dashboard to get metrics on potential and confirmed case deflections and the most helpful articles and discussions.

SEE ALSO:

- Case Deflection
- Community Case Deflection Metrics Dashboard and Reports
- Ask Button
- Contact Support & Ask Buttons

Einstein Analytics Dashboard

Use the Einstein Analytics Dashboard component to add Einstein Analytics to your community's pages.

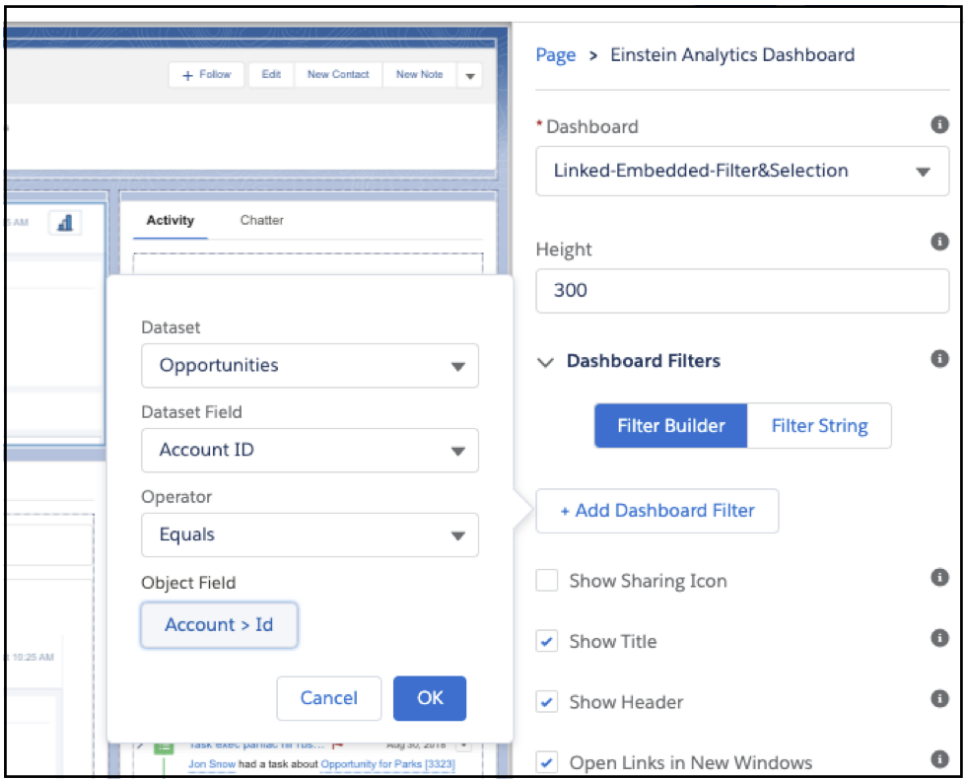
1. Select the **Einstein Analytics Dashboard** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Dashboard`	Select an available dashboard from the dropdown list.
`Height`	Specify the height of the dashboard, in pixels. The default is 300.

`Dashboard Filters`	Add selections or filters to the embedded dashboard at runtime. You can filter dataset fields by variables or specified values. Specify filters either by using the point-and-click Filter Builder or by entering JSON strings in the Filter String box. For filtering on dimensions, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': ['$value3', '$value4']}}]}}`
	For filtering on measures, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': [[$value3]]}}]}}`
	datasets takes dataset system names which are found in the left panel of the edit page for a dataset. (If your org has namespaces, include the namespace prefix and two underscores before the dataset system name.)
	fields takes dimensions or measures in the dataset. To find the names, click the Explore icon to open the widget, select Show SAQL from the Options menu.

Property	Details
	values can be specific values or fields in a Salesforce object To find the name of a field, go to Setup, locate the object you want, and select Fields. Use the Field Name (also known as the API name). For custom fields, use the name with "__c" at the end. With the **selection** option, the dashboard is shown with all its data, and the specified dimension values are highlighted. The selection option can be used alone or with the filter option. Selection takes dimension values only. To use this option, the dashboard must include a list, date, or toggle widget that groups by the specified dimension. With the **filter** option, the dashboard is shown with only filtered data. The filter option can be used alone or with the selection option. Filter takes dimension or measure values. Use **operator** with the filter option. Supported operators for dimensions: in; not in; matches Supported operators for measures: = ; >= ; > ; <= ; <. • If a filter or selection can't be applied, the attribute is ignored and the dashboard appears with all its data and no selection. • The Filter Builder is available only when adding the Einstein Analytics Dashboard component in a record page layout. If you're adding the component in an app or home page layout, you can still create filters by entering JSON strings in the text box. • The Filter Builder supports filters that associate Analytics dataset fields with Salesforce record object fields or custom object fields. The dataset fields must be dimensions (not dates or measures), and the object field values must be tokenizable (not static values). Use the Filter String text box to specify filters or dashboard selections not supported by the Filter Builder. • A filter can't be viewed or edited in the Filter Builder if it was created or edited in the Filter String text box.
`Show Sharing Icon`	Add the Share icon on the dashboard. When this option is selected, users can click the icon to open the Share dialog, where they can post to Chatter and download images and data. To show the Share icon, the minimum dashboard height is 612 pixels. Default is false.
`Show Title`	Control the visibility of the dashboard title. When this option is selected, the dashboard's title appears above the dashboard. Default is true.
`Show Header`	Control the visibility of the dashboard header. When this option is selected, the dashboard is displayed with a header bar that includes the Open in Analytics icon, the date and time that the dashboard's data was updated, and the dashboard views menu. Note that the header bar also appears if either Show Sharing Icon or Show Title is selected.
`Open Links in New Windows`	Specify where links from the dashboard to other assets are opened. When this option is selected, links open in new windows. When this option isn't selected, links open in the same window. Default is true.
`Hide On Error`	Control whether or not users see a dashboard that has an error. When this option is selected, if the dashboard has an error, it won't appear on the page. When this option isn't selected, the dashboard appears but doesn't show any data. An error can occur when a user doesn't have access to the dashboard or it has been deleted. Default is false.
`Set Component Visibility`	Add filters to control whether the dashboard appears on a page.

Example: Einstein Analytics Dashboard component:



Engagement

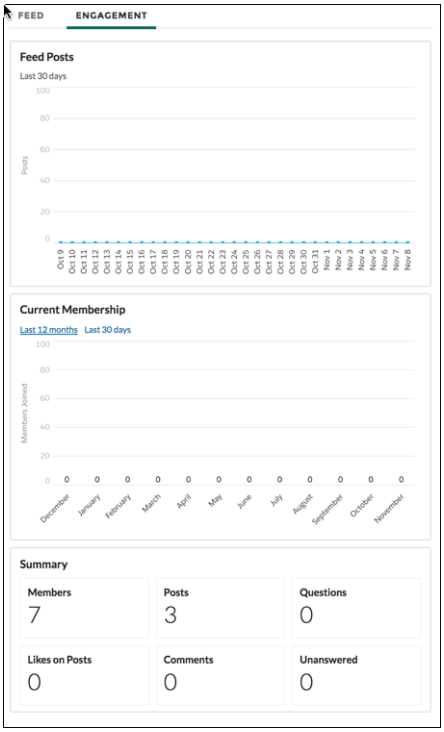
The Engagement component displays charts related to member engagement in the Chatter group.

The Engagement component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Engagement** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Expanded Category Navigation

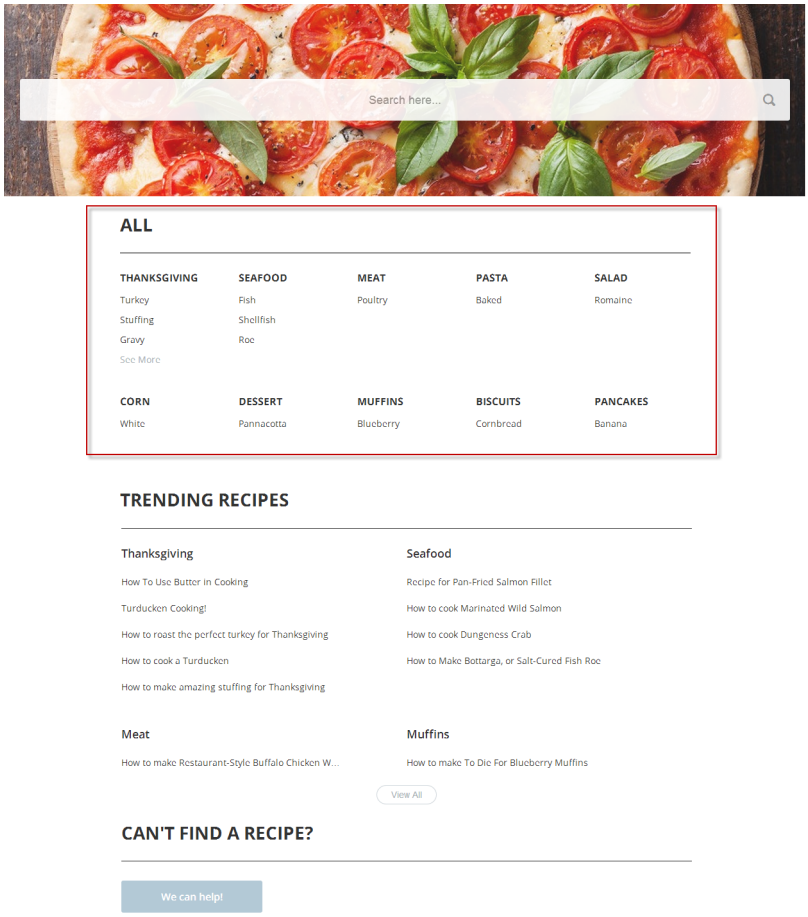
The Expanded Category Navigation component organizes articles based on a hierarchy of categories.

Users can select a top-level category and then view the related categories and subcategories as they're browsing for articles. Then they can click the child category to view the articles that are associated with it. For long lists of categories, users can expand the list to view all of the categories and then collapse it to make it more compact.

1. Select the **Expanded Category Navigation** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Title`	If you'd like to display another name for the top-level data category, enter the text in this field. For example, if the top-level category name is *`Desserts`*, you can change the text to *`Easy Dessert Recipes`*. The text you enter in this field appears only as the title of the page. You aren't changing the name of the category in navigation breadcrumbs or anywhere else
`Max Number of Sub-Categories`	Specify the to limit the number of child categories to display for each parent category. The default is 3.
`Max Number of Categories`	Specify the maximum number of parent categories to display in the page. The default is 10, but there is no restriction on the number of parent categories you can display.

Example: Sample Expanded Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Template?

Featured Data Categories

The Featured Data Categories component displays a group of data categories, with an image and title showing for each data category within the specified group. Images help your users select which group of articles they'd like to browse.

Before you begin, first upload image files to the Assets folder on the Overview tab of Site.com Studio. The recommended frame size for this image file is 480 x 480 pixels. The recommended file size is up to 400 KB.

Use the convention `<datacategoryname>-<size>.<filetype>` to name the image files, so that the system associates the correct image file with the data category of the same name. For Featured Data Categories, the file names for your images must match exactly the name of each data category and include a notation for square images (`s`):

<datacategoryname>`-s.jpg`

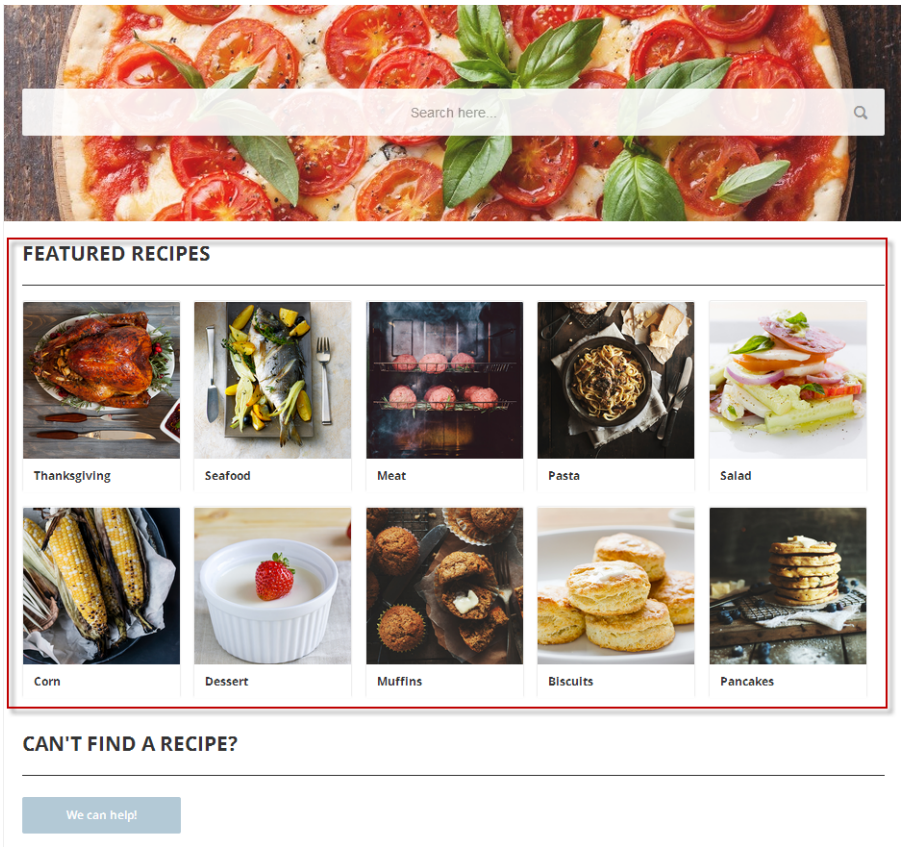
For example, for a data category with the name *Desserts*, the corresponding square image file is named `Desserts-s.jpg`.

Tip: Salesforce recommends .jpg format for image files and .png format for graphic art. To increase the speed at which pages load, use progressive JPEG compression whenever possible.

1. Select the **Featured Data Categories** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Number of Data Categories`	Type the number of data categories to display from the group. Categories display in the order listed in the data categories group.
`Category Image URL`	Specify the relative URL to display the image associated with each data category using the expression `{!Global.PathPrefix}/{!DataCategory.Name}.jpg`. The expression maps directly to `<datacategoryname>-<size>` and displays images for the data categories in the order in which they are listed in the data category group. For subfolders, use the expression `{!Global.PathPrefix}/<Name of the Subfolder>/{!DataCategory.Name}.jpg`. For images from another source, use `http://<other source>/{!DataCategory.Name}.jpg`.
`Title`	Enter the title text for the list of featured data categories.

Example: Sample Featured Data Categories component:



SEE ALSO:

Which Components Can I Use with Each Template?

Featured Search

The Featured Search component lets your users search for articles within a specified data category. When a user types in the search text box, the system returns articles and search strings based on matches with the characters being typed. You can customize the search to display an image for the data category in which the user is searching.

Before you begin, first upload image files to the Assets folder on the Overview tab of Site.com Studio. The recommended frame size for Featured Search component images is between 1280–2560 pixels wide by 175 pixels high. Images with an aspect ratio of 3:1 (wide and relatively short) provide the best results. The recommended file size is up to 1 MB.

Use the convention `<datacategoryname>-<size>.<filetype>` to name the image files, so that the system associates the correct image file with the data category of the same name. For Featured Search, the file names for your images must match exactly the name of each data category and include a notation for wide images (`w`):

***`<datacategoryname>`*`-w.jpg`**

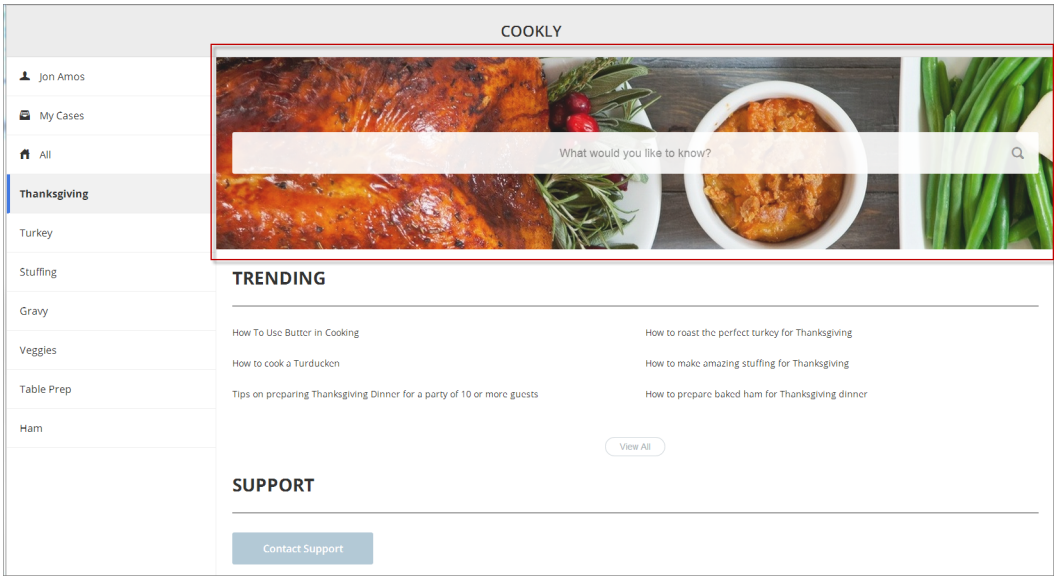
For example, for a data category with the name *Desserts*, the corresponding wide image file is named `Desserts-w.jpg`.

Tip: Salesforce recommends .jpg format for image files and .png format for graphic art. To increase the speed at which pages load, use progressive JPEG compression whenever possible.

1. Select the **Featured Search** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Placeholder Text`	Enter the text that appears in the search bar. The default text is `What would you like to know?`
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Disable Background Image`	Select the checkbox if you don't want to display the background image for the category. The search box becomes smaller and more compact.
`Max Number of Auto Query Suggestions`	Enter the number of search queries to return per match.
`Max Number of Article Title Match Results`	Enter the maximum number of articles to return per match.
`Category Image URL`	Specify the relative URL to display the image associated with each data category using the expression `{!Global.PathPrefix}/{!DataCategory.Name}.jpg`. The expression maps directly to `<datacategoryname>-<size>` and displays images for the data categories in the order in which they are listed in the data category group. For subfolders, use the expression `{!Global.PathPrefix}/<Name of the Subfolder>/{!DataCategory.Name}.jpg`. For images from another source, use `http://<other source>/{!DataCategory.Name}.jpg`.

Example: Sample Featured Search component:



SEE ALSO:

Which Components Can I Use with Each Template?

Featured Topics

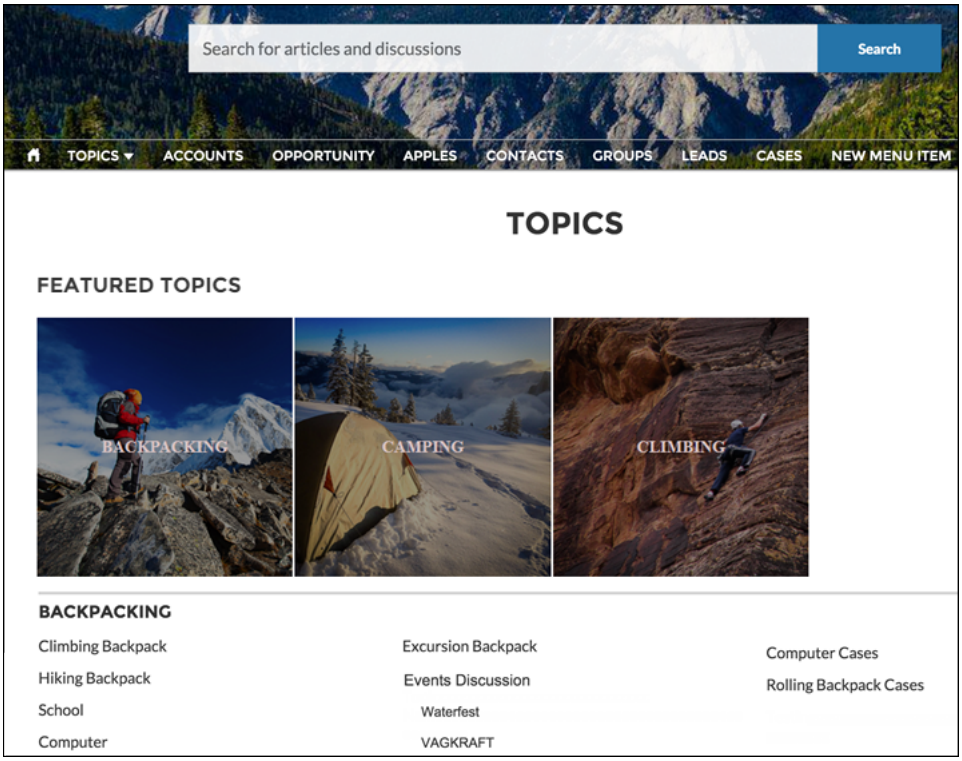
The Featured Topics component lets you place your community's designated featured topics and the images that represent them on any community page.

1. From the Components list, select the Featured Topics component and drag it onto a community page.
2. On the page, select the **Featured Topics** component.
3. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the featured topics area. The default text is `Featured Topics`.
`Show Title`	Check to show the title. Clear to hide the title.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is `0,0,0,0.4`.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the community's theme. In Builder, you can test your hover color in Preview mode.
`Border Radius`	Slide to adjust the curve of featured topic tile borders. **Note:** If the component is in a narrow container, a round radius tends to look more oval.

Property	Details
	If you set border radius to `50`, very round, we recommend that you set Text Position to `left`, `right`, or `center`. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Builder, you can test your hover color in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it's inactive. In the property's **rgba** field, the default is `0,0,0,0`.
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is `0,0,0,0`. In Builder, you can test your hover color in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • `Top Left` • `Top Center` • `Top Right` • `Left` • `Center` • `Right` • `Bottom Left` • `Bottom Center` • `Bottom Right`
`Text Alignment`	Set alignment of text within the text background. Select `Center`, `Left`, or `Right`. Note: Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Featured Topics on the Topic Catalog page.



SEE ALSO:

Set Up Featured Topics

Feed

The Feed component displays a feed of all record or group interactions, including posts, questions, and attachments.

Use the Feed component in the Customer Service template to add a feed to a record, topic, group, user profile, or community discussion. The component provides a chronological, filterable list of posts made with the Feed Publisher component. Users who click a post's timestamp are directed to an expanded view, which shows the post and all its related comments.

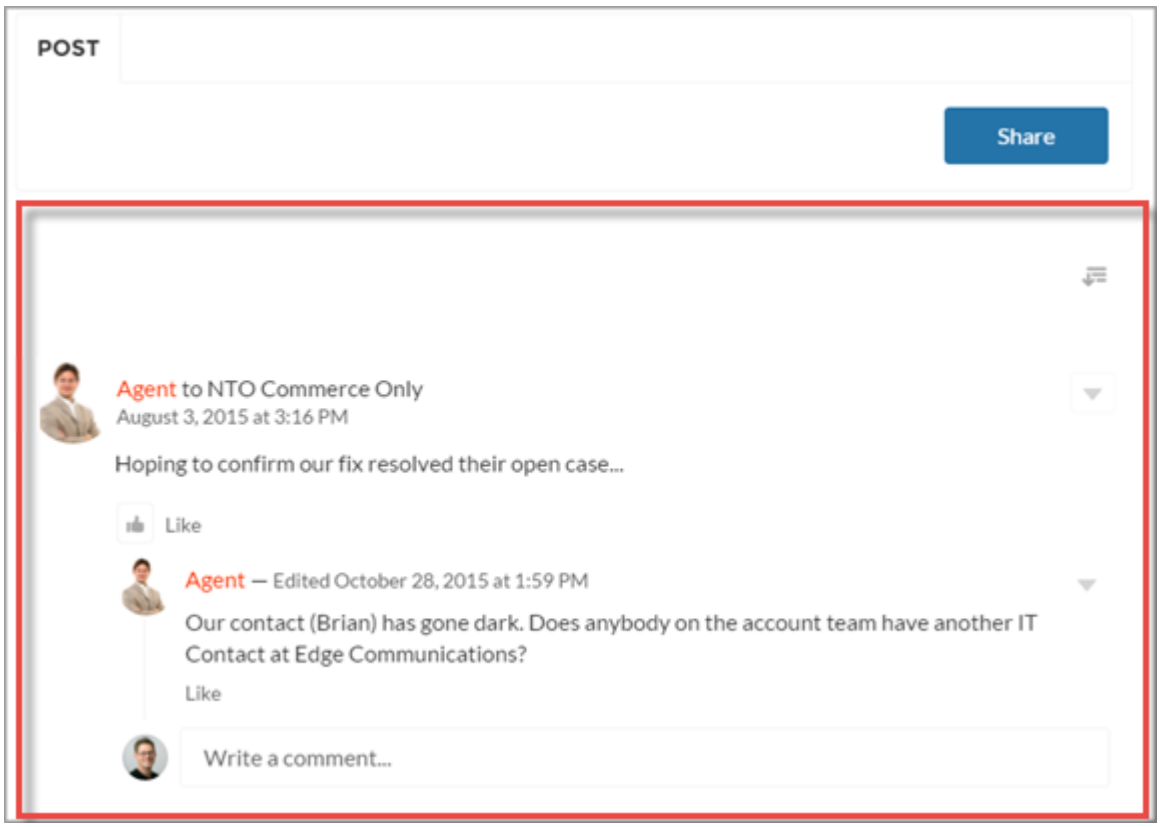
Comments and attachments on posts appear inline below the post for desktop and tablet users.

1. Select the **Feed** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Feed Type`	Select the type of feed you'd like to place on your page. Types include: • `Topic`—Topic feed shows everything that is posted to a selected topic. You can also use the `Topic` type for discussion feeds. • `Record`—Record feed shows everything that is posted to a selected record, like an account or opportunity. You can also use the Record Type for user profile feeds. • `Group`—Group feed shows everything that is posted to a selected group.

Property	Details
	Search is not supported on the `Topic` feed type. If you plan to make your feed searchable, select the `Group or Record` feed type.
`Record ID`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in `Feed Type`.
`Default Filter`	For feed entries that you want your community members to see, select the default filter.
`Default Sort Order`	The default sort order on a feed. Presents community members and guests with the initial experience that you intend. If users choose to change the sort order in their view, their selection sticks.
`Post Style`	Choose to expand or collapse post comments by default.
`Let members search feeds`	Choose to let community members search an individual feed. Search is not supported on the `Topic` feed type.
`Let members sort feeds`	Choose to let community members sort a feed. When sorting is enabled, members can sort a feed by the latest posts or most recent activity.

Example: Sample Feed component



Each feed type comes with a set of filters for limiting what's shown in the feed. This table lists and describes filter types, and it pairs filters with the feeds where they're available.

Note: The Bookmarks feed doesn't have any filters.

Filter Name	Description	Feed Types
All Updates	Shows all posts in a feed. No comments are show. Click a post's date and time stamp to navigate to its detail view. The detail view includes all comments on the post.	• Group or Record • My Feed • User Profile
All Questions	Shows all the questions in the feed.	• Community Discussion • Group or Record • My Feed • Topic
Posted by This User	When you visit someone's profile, this filter shows the posts authored by the user you're visiting. On your own profile, this filter shows the items that you posted.	• User Profile
Questions with Best Answer	Shows all questions with an answer that is marked as best.	• Community Discussion • Group or Record • My Feed • Topic
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.	• Community Discussion • Group or Record • My Feed • Topic
Unanswered Questions	Shows the questions that aren't answered.	• Community Discussion • Group or Record • My Feed • Topic
Unread Posts	Show posts that haven't been read.	• Group or Record

SEE ALSO:

Which Components Can I Use with Each Template?

Feed Compact

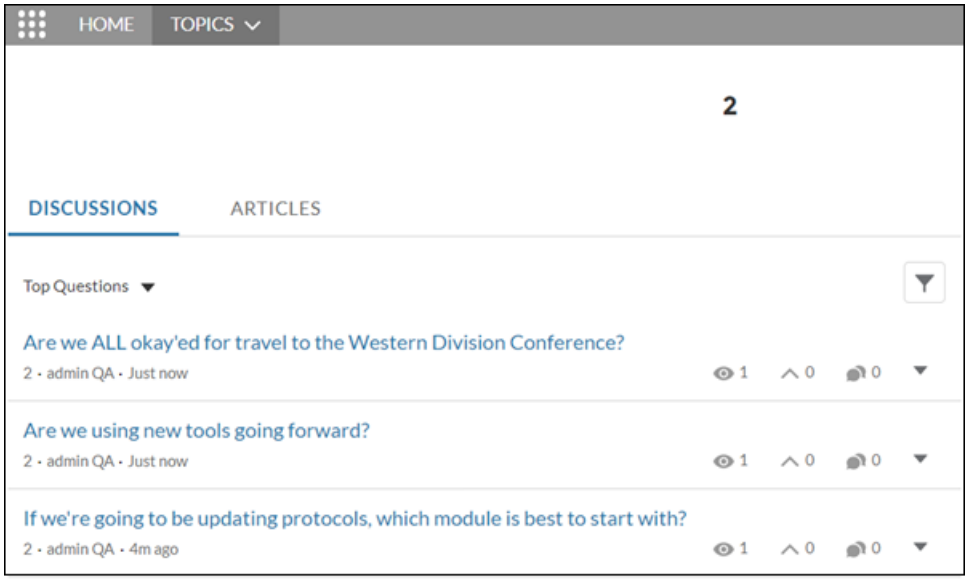
Use the Feed Compact component in the Customer Service template to add a compact, scannable version of a feed to an object. Object types that take a compact feed include a record, a topic, a group, a user profile, or an overall community discussion. Feed Compact is exclusively a Q&A feed. The component provides a chronological list of question posts made with the Feed Publisher component.

Compact feeds initially show only parent-level feed posts. Clicking a post takes you to the expanded post and all its related comments.

1. Select the **Feed Compact** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Show Views`	Select to show the number of times an item is viewed 2. A view is counted when an item is liked, commented on, or its detail view is opened. Clear to hide the view count.
`Show Likes`	Select to show the number of likes for each post. Clear to hide the number of likes.
`Show Comments`	Select to show the number of comments for each post. Clear to hide the number of comments.
`Compact Feed Type`	Select the object or context you want to associate this feed with. • Community Discussion—Shows all feed items tagged with a navigational topic, for example *`#Q4wins`*. Users don't have to follow a navigational topic to see it in the discussion. And feed items that discuss the topic but don't have the tag don't appear in the discussion, even to users who follow the topic. Shared feed items appear in a Community Discussion feed only if the message posted with the shared item (the share message) includes the topic tag. Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • Group or Record—Shows all feed items created on a record or in a group. • My Feed—Shows feed items that are tagged with a topic or person that you follow. My Feed also shows all of your personal community activity. You see all shared feed items unless another person shared the item with a group that you aren't a member of. There's an exception. You can share feed items to public groups you aren't a member of. With public groups, you see the feed item that you shared despite not being a member. • Topic—Shows all feed items that are tagged with the topic. Shared feed items appear in a Topic feed only if the message posted with the shared item (the share message) includes the topic tag (for example, *`#Q4wins`*). Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • User Profile—Shows your personal community activity. • Bookmarks—Shows feed items that you bookmarked.
`Entity Id`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in `Compact Feed Type`.
`Default Sort Order`	The default sort order on a feed. Presents community members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.

Example: **Sample Feed Compact component**



Feed Compact comes with a set of filters for limiting what's shown in the feed. This table lists and describes Feed Compact filter types.

Filter Name	Description
All Questions	Shows all questions in a compact feed. No answers are show. Click a question or its date-and-time stamp to navigate to its detail view. The detail view includes all answers to the question.
Unanswered Questions	Shows all questions that aren't answered.
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.
Questions with Best Answer	Shows all questions that have an answer that's marked as a best answer.

SEE ALSO:

Which Components Can I Use with Each Template?

Feed History

The Feed History component displays the number of posts per day in the past 30 days.

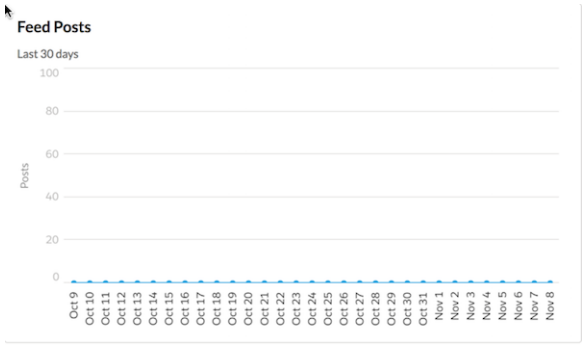
The Feed History component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Feed History** component in the page that you're configuring.

2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Feed Post & Comments

The Feed Post & Comments component shows the detailed view of an individual post, comment, or question in the community feed. For questions, it includes the question, all the answers to that question, and an indication if it was escalated to a case.

Note: Before Spring '16, this component was named Feed Item Detail.

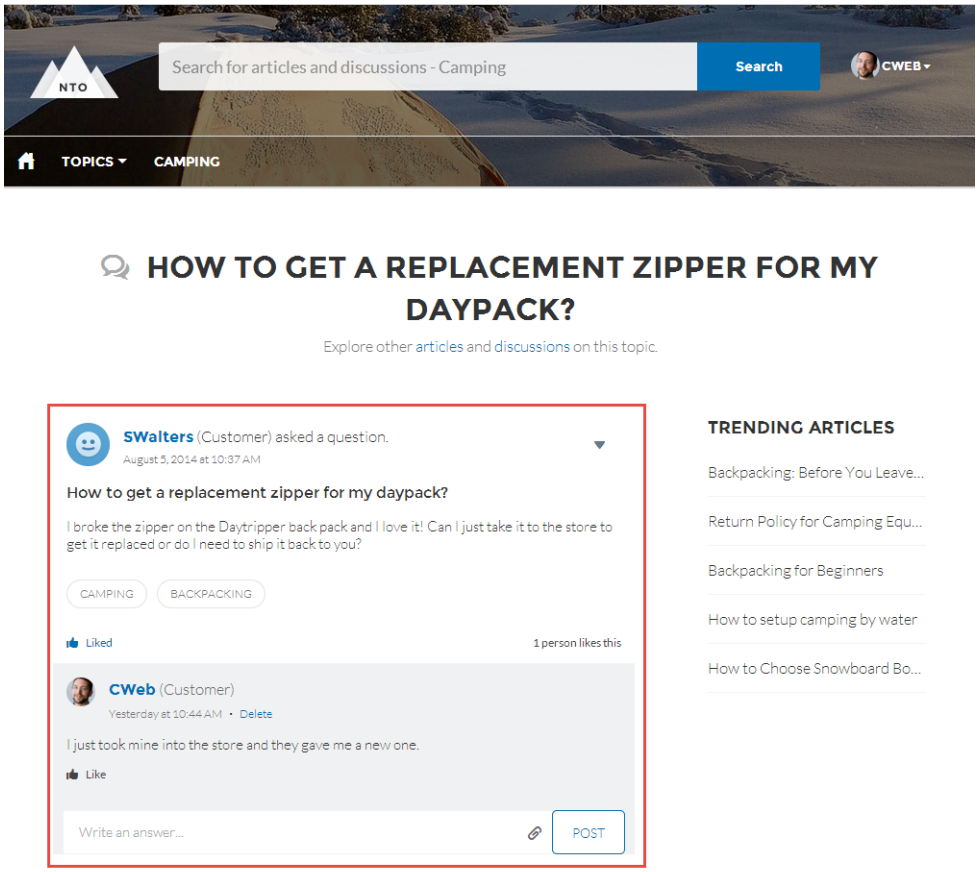
Only users who are logged in can post an answer to a question. Users can attach a file to a question or answer post by clicking the paperclip icon. They can choose to **Select a File** from files already uploaded to the community or **Upload a File** from the user's local drive.

Once an answer is posted, users can click ▾ at the top right corner of the post to edit, bookmark, delete, or flag the post. Also, users can edit the topics associated with the post. The editing and flagging features must be enabled for the community.

1. Select the **Feed Post & Comments** component in the page you're configuring.

   There are no properties to set for this component.

Example: Sample Feed Post & Comments component:



SEE ALSO:

Which Components Can I Use with Each Template?

Feed Publisher

The Feed Publisher component lets customers create rich text posts on records, groups, topics, and profiles, and attach files from any of their devices. It also supports multiple file attachments, inline images, and rich link previews. The Feed Publisher component isn't supported for articles.

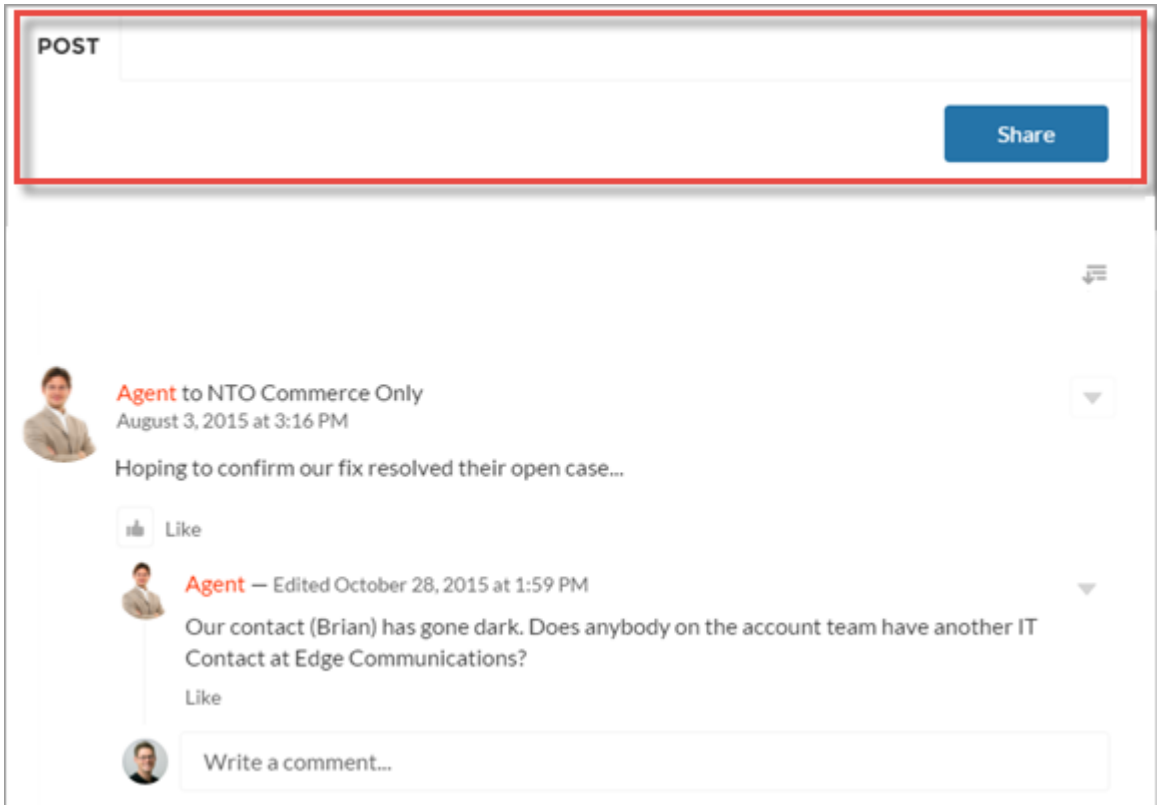
When community members create posts using the Feed Publisher, the posts are displayed in the related Feed or Feed Compact component for the page. By default, you can attach any supported file type up to 2 GB per file. For best performance, inline images up to 25 MB per image are recommended. Inline images over 25 MB appear at full size, and can be slow to load.

Note: Copying inline images from external sources and pasting them into the text editor is not supported.

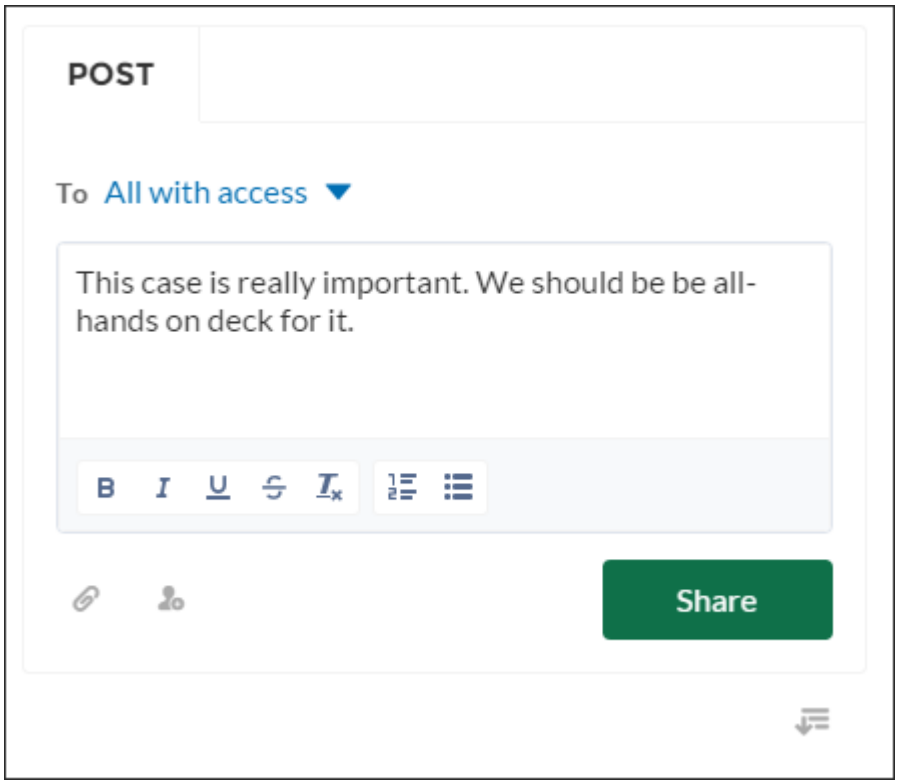
1. Select the **Feed Publisher** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Type`	Select the type of feed publisher you'd like to place on your page. To use global publisher actions defined in your Salesforce organization, choose Global. To use an object-specific publisher layout, choose Record. For example, use Record if you want to add the publisher to a custom group detail page. Use the publisher actions that are included in the group publisher layout for your org.
`Record ID`	The feed item ID. Typically, this field is automatically populated with the record ID when the page loads. Leave this field blank if you pick the Global feed publisher type.
`Publisher Layout Design`	Choose if you'd like to see the wide or narrow feed publisher layout design.

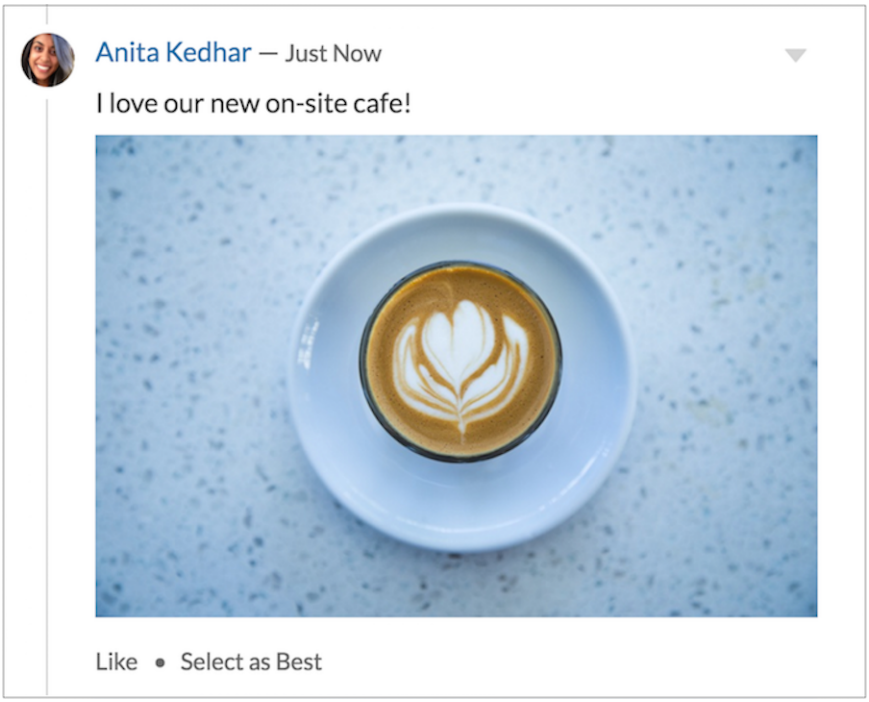
Example: Sample Feed Publisher component, wide layout



Example: Sample Feed Publisher component, narrow layout



Example: Sample feed post with inline image



SEE ALSO:

Which Components Can I Use with Each Template?

Files List

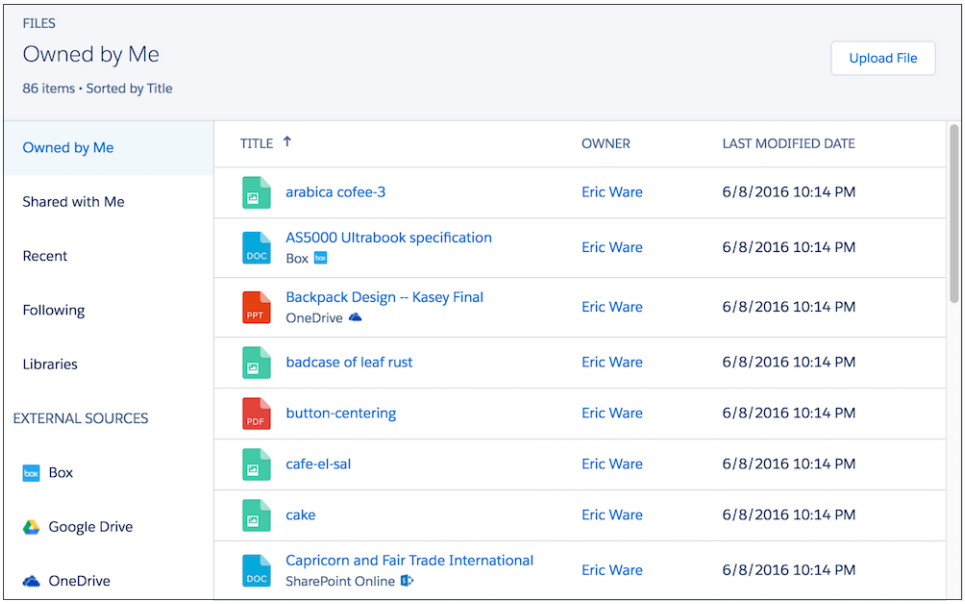
Use the Files List component in the Customer Service template to give community members a convenient place to view and manage their files.

Members can upload, sort, and filter files using the files list. Clicking a file opens the file previewer, where members can upload a new version, download, and delete the file. Filters in the left sidebar show different selections of files. The Libraries filter shows files from Salesforce CRM Content libraries, and Files Connect users can see their external libraries under External Sources.

1. Select the **Files List** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Files List`	Modify the number of records that display in the window, from 10 to 100. A scrollbar appears to let users scroll to see more records

Example: Sample Files List component, wide layout



Flow

Flows automate business processes to collect, update, edit, and create Salesforce information. With the Flow component in Community Builder, you can add flows to your pages. Add the Flow component to your community pages just like any other component.

Note:

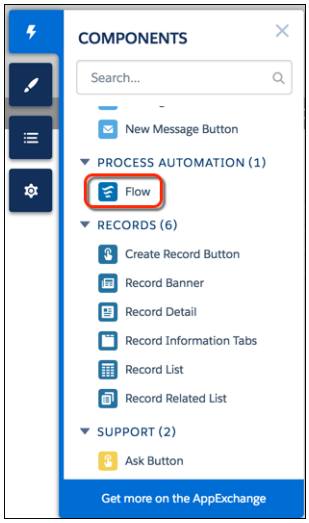
- Flows in Lightning communities are supported through the Flow and Suggested Actions components.
- Flow creators can overwrite error messages with their own content.

USER PERMISSIONS

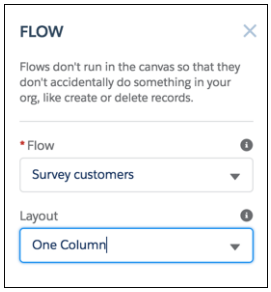
To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

To run a flow in a Lightning community
- Run Flows

1. Build a flow in Flow Builder.
2. Activate the flow.
3. Drag the Flow component into position on your community page.



4. In the property editor, select the flow you want to use and any other properties.



Flow
Only active screen flows are available. Flows that were built in the Desktop Flow Designer aren't supported.

Layout
By default, flows display in one column.

Input variables

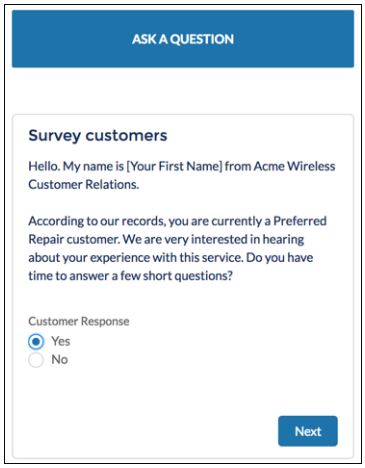
If you see other properties, they are the flow's input variables. Variables appear only if they allow input access.

Pass record ID into this variable

This option is available only for Text input variables in Record pages. For simplicity, we recommend passing the ID to only one variable.

For example, when this component is embedded in an Opportunity Record page, at run time the component passes the opportunity's ID into the selected input variable.

Example: Here's a flow called Survey customers in a community.



SEE ALSO:

- Which Components Can I Use with Each Template?
- Build a Flow
- Two-Column Flow Considerations
- Customize the Error Message for Running Flow Users (Best Practice)
- *Lightning Aura Components Developer Guide* : Create Custom Component for Guest User Flows

Allow Guest Users to Access Flows

Allow guest users to access flows within a community to create multi-part registration forms, decision trees, and conditional screens tailored to unauthenticated users. Flows give your guest users more flexibility to accomplish tasks and provide information before they have to register.

To allow guest user access from Community Builder:

1. Go to **Settings**.
2. On the General tab, select **Public can access the community** and then click the guest user profile.
3. Under System Permissions, turn on the **Run Flows** permission.

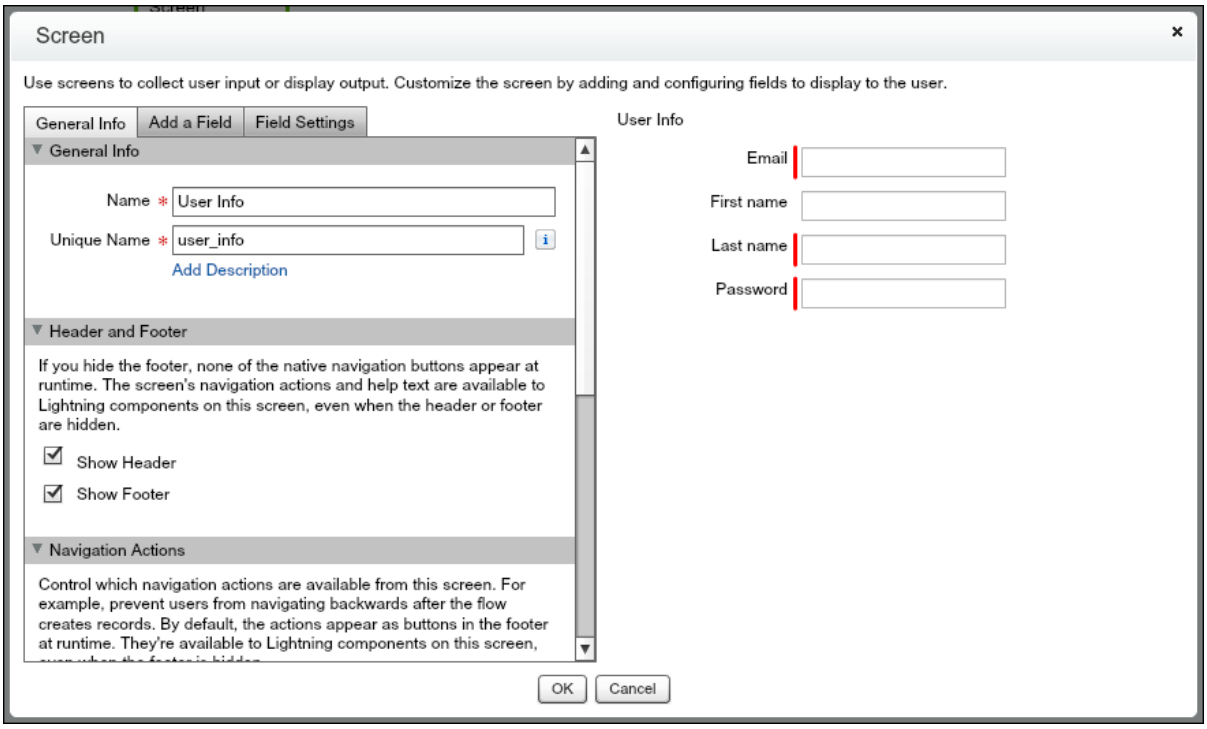
Note: To use Guest User Flows for login or self registration, demonstrated in the example below, a developer must create a Lightning component that implements `lightning:availableForFlowsScreens`. They must also create an Apex controller for that component that uses the API exposed on the site object.

To add a flow to your login page from Community Builder,

1. Go to the Login page and add the Flow component.
2. In the properties panel, select a predefined flow and a layout.
3. Edit the audience and assign it to Guest.
4. Delete the Login Form component.

Example: There are many use cases for allowing guest users to use flows, but one of the most common is collecting data privacy preferences before a visitor registers. Start by creating a flow and adding a User Interface screen that collects identifying information, such as email address and name.

Note: Guest users can't resume paused flows from Lightning communities, so we recommend removing the Pause button from flows that are available to guest users.



EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**.

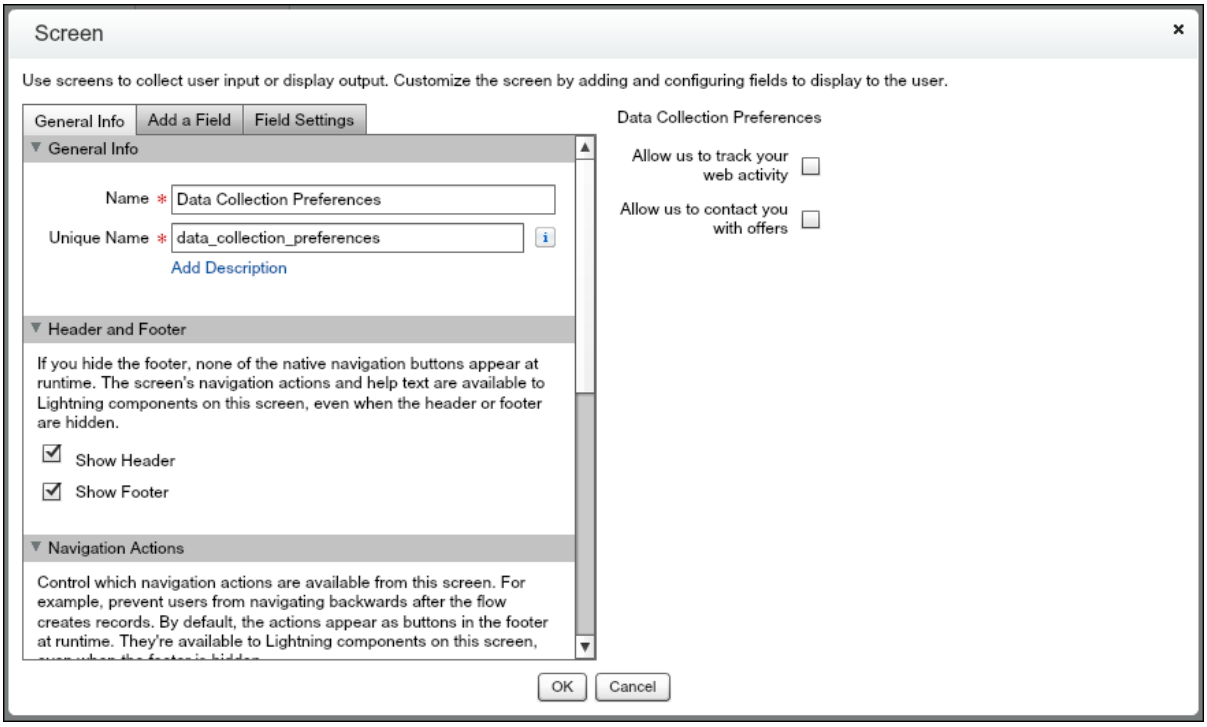
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create, customize, or publish a community:

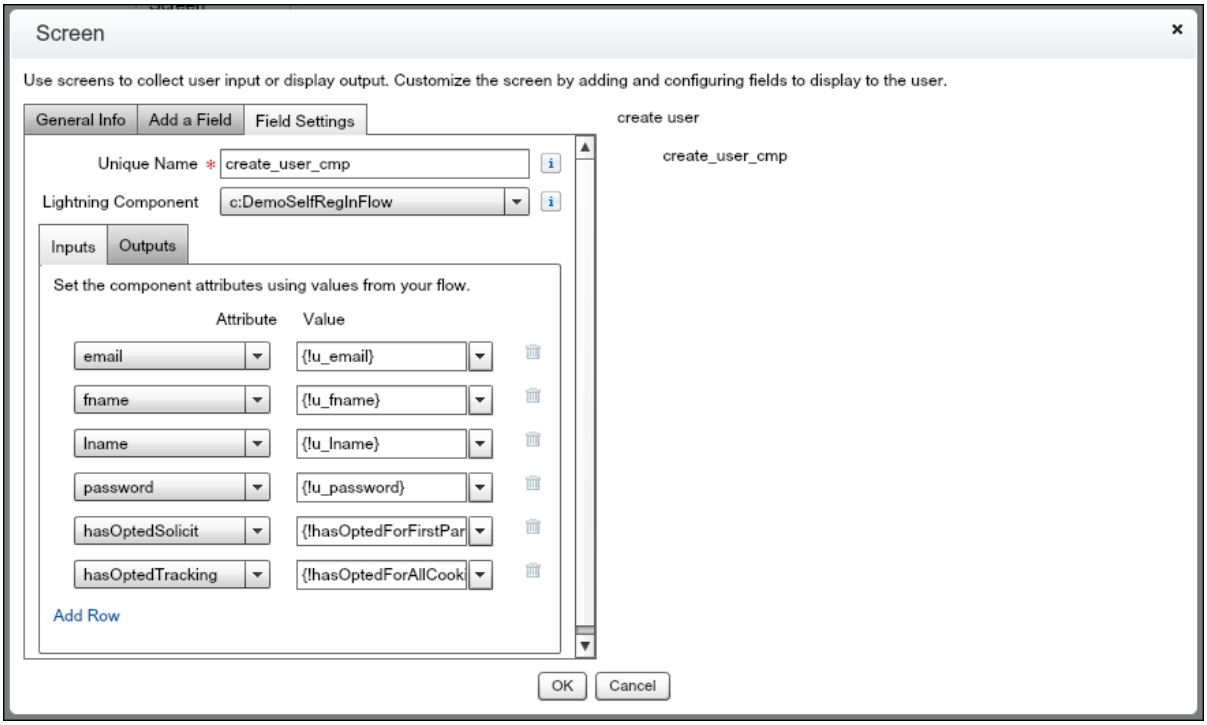
- Create and Set Up Communities AND View Setup and Configuration

Create a screen that collects the user's data collection preferences.



Note: To use data collection features, you must turn on Consent Tracking.

Create a final screen that uses your custom Lightning Component to pull the information collected in the previous screens into the user's profile when they register. Add a Lightning Component field to the screen and select your custom component from the dropdown. Match your attributes to the appropriate user fields in your org.



SEE ALSO:

Which Components Can I Use with Each Template?

Lightning Aura Components Developer Guide : Create Custom Component for Guest User Flows

Follow Button

The Follow Button component lets users follow topics, articles, and other users.

In the Page Editor, you can configure the follow button component on the User Profile, Article Detail, and Topic Detail pages. This component lets users follow other users, articles, or topics. When a user views their own profile, the button isn't visible because users can't follow themselves.

Each button instance supports its own property values. So, if you have two Follow buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your community theme so that they all look the same. But each button instance remains unique.

1. Select the **Follow Button** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Followed Record ID`	The system supplies this value. Don't update this field.
`Allow email notifications on topics`	Select to let user's receive email notifications for topic activity.

Property	Details
`Button Text Color`	Set the color of text that's used for the button label. Note: The link icon shows that the current selection comes from colors defined in the community theme.
`Button Text Hover Color`	Set the color of text that's used for the button label when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	To set the horizontal alignment of a button within its container, select *`Center`*, *`Left`*, or *`Right`*.

Example:

Note: Turn on Feed Tracking for each article type you want members to follow.

SEE ALSO:

Which Components Can I Use with Each Template?

Global Search Box

The Global Search component lets you expose global search in your community. Let your users search for any object available to them.

Autocomplete search results are based on the most recently used objects and records by the user, same as global search in your org. The search accounts for partially matching terms and non-adjacent terms.

1. Select the **Global Search Box** component in the page you're configuring.
   In the Partner Central template, for example, this box is on the Home page.
2. In the property editor, configure properties for the component:

Property	Details
`Placeholder Text for Search Field`	Specify the text that appears in the search box. The default text is Search...
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your community's autocomplete results.
`Maximum Autocomplete Results`	Enter the maximum number of autocomplete results displayed to the user during a search. The default is `5`.

Example: Sample Global Search Box component in Partner Central:

SEE ALSO:

Which Components Can I Use with Each Template?

Global Search for Peer-to-Peer Communities

Global Search for Peer-to-Peer Communities is a simplified version of the Search & Post Publisher that community admins use to separate the search function in the component from the publishing function. The component is also separate and distinct from the overall header, making it easier to customize to a community's needs.

Autocomplete search accounts for partially matching terms and non-adjacent terms.

1. In the page that you're configuring, select the **Global Search for Peer-to-Peer Communities** component.
2. In the property editor, configure properties for the component:

Property	Details
Placeholder Text for Search Field	Enter the text that appears in the search box. The default text is Search...
Autocomplete Search	Click to expand the section with autocomplete search properties.
Use autocomplete in searches	Select to let users see suggested search results as they type search terms.
Maximum Autocomplete Results	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects is displayed in the combined results tab. If a type doesn't have enough results, additional results of other types are displayed to reach the maximum number. This functionality is available only in the Winter '16 and later versions of community templates.

Property	Details
Limit autocomplete search results to Discussions and Articles	Select to show only discussions and articles in autocomplete results.
Objects in Autocomplete Results	Click **Add** to add searchable Salesforce objects to your community's autocomplete results.
Ask Community	Click to expand the section with properties regarding asking the community.
Show footer during search	Select to display the footer that gives members an option to ask the community a question.
Post to Ask the Community	Enter the text that invites users to post a question to the community or to customer support. The default is: Don't see what you're looking for?.
Create Your Question Prompt	Enter the text that users click to ask a question. The default is: Ask a question.
Create Your Sign-In Prompt	Enter the text that directs users to a login page before they ask a question. The default is: Sign in to ask a question.
Show topics	Allows users to add topics to the questions that they ask the community.
Show details	Allows users to enter details of the question that they ask the community.

SEE ALSO:

Which Components Can I Use with Each Template?

Global Search Results

The Global Search Results component displays search results from across the community. The results shown are based on search terms entered in the Search Publisher and can be displayed in one list or in multiple tabs.

1. Select the **Global Search** component.
2. In the property editor, configure properties for the component:

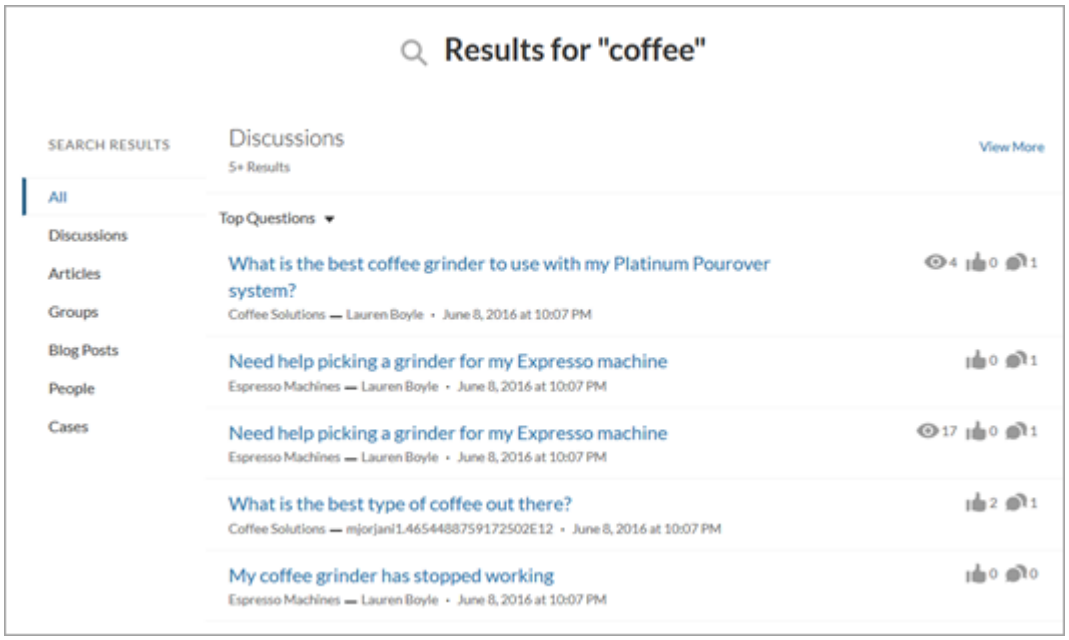
Property	Details
`{!searchString}`	The system supplies this search term to search across the community.
`Show the All results tab`	Check the box to show search results in one list under All.
`Search Results Tabs`	Add or remove tabs to customize which lists search results are displayed in.

Important: To allow your users to find a custom object's records when they search, in Salesforce setup create a custom tab set to *`Default On`* or *`Default Off`*. Creating a custom tab enables the custom object's **Allow Search** setting.

Example:

Note: To see results from all feed types in a community (including questions and posts on records), select the **Show search results from all feeds, including questions, posts, and comments** option on the Discussions tab.

Global Search Results shown in the community:



SEE ALSO:

- Which Components Can I Use with Each Template?
- Set Up and Manage Salesforce Search
- I Know a Record Exists—Why Can't I Find It?

Group

The Group component displays all the content in a group using a single composite component. It includes the group banner, which includes the member and owner actions, the group feed, description, and related lists (group members and files).

When you add groups to your community navigation menu, clicking the Groups item directs community members to a list of groups. Clicking a group in the group list loads the Group Detail page, which uses this component by default.

Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component on a custom page.

1. Select the **Group** component on the page you're configuring. By default, this component is located on the Group Detail page.

   Note: You must have at least one group in your community to view the Group Detail page and modify its components.

2. In the property editor, configure properties for the component:

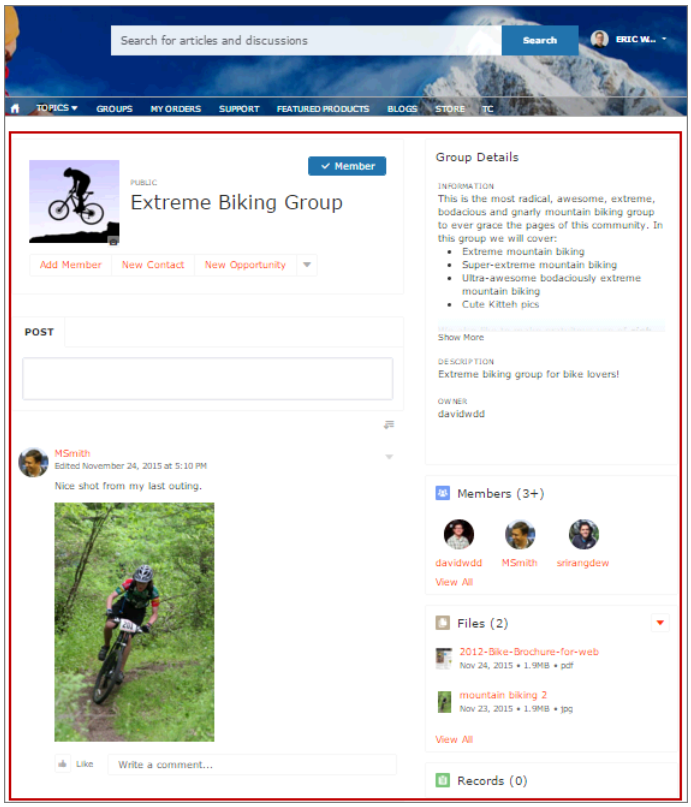
Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

Property	Details
`Feed Tab Label`	The label used for the group feed tab on mobile devices. The default text is `Feed`. The label you specify here doesn't affect labels on desktop browsers.
`Details Tab Label`	The label used for the group details tab on mobile devices. The default text is `Details`. The label you specify here doesn't affect labels on desktop browsers.
`Related Tab Label`	The label used for the related lists tab on mobile devices. The default text is `Related`. The label you specify here doesn't affect labels on desktop browsers.

Example:

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching *`Email Settings`* in the **Quick Find** search box in Salesforce Setup.

Sample Group component:



Note: The Group component is optimized to be responsive across all devices. If you want more control over the placement of group content, you can use separate components to create a custom layout. Use the Group Banner, Group Detail, Group Related

List, Feed Publisher, and the Feed or Feed Compact components to create a custom group page. However, creating a custom group page does not guarantee optimal display and responsiveness across desktop and mobile devices.

SEE ALSO:

Which Components Can I Use with Each Template?

Group Banner

Use the Group Banner component on custom group detail pages for your community. This component displays the group name, the group photo, the Join Group and Leave Group buttons, and other action buttons for group owners, managers, and members.

Use the Group Banner component with the Group Detail, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component.

1. Select the **Group Banner** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

Example: **Sample Group Banner component**

SEE ALSO:

Which Components Can I Use with Each Template?

Group Detail

Use the Group Detail component on custom group detail pages for your community. This component displays the content from the group description and information fields along with the name of the group owner.

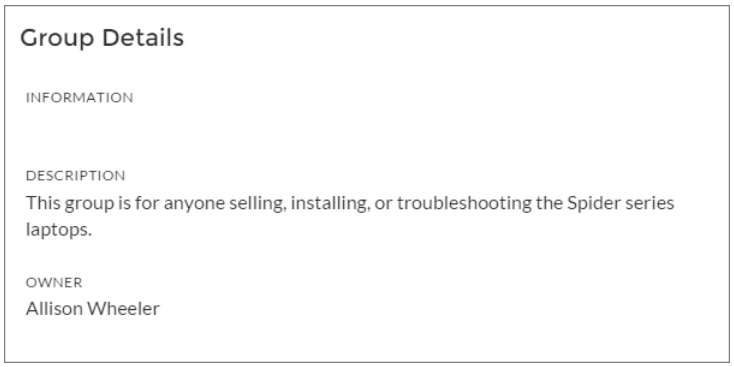
Use the Group Detail component with the Group Banner, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness

across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

1. Select the **Group Detail** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.
Header label	The label for the group details section. Affects both the desktop and mobile view.

Example: **Sample Group Detail component**



SEE ALSO:

Which Components Can I Use with Each Template?

Group Related List

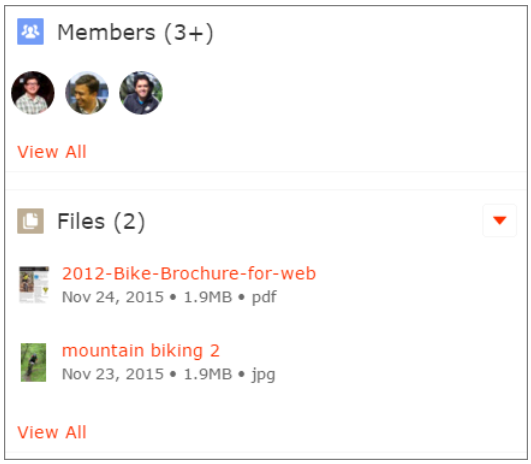
Use the Group Related List component on custom group detail pages for your community. This component displays the group files, members, and records.

Use the Group Related List component with the Group Banner, Group Detail, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

1. Select the **Group Related List** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

Example: **Sample Group Related List component**



SEE ALSO:

Which Components Can I Use with Each Template?

Headline

The Headline component gives you customizable headline text and text banner with inline links to pages that show discussions, topics, and articles. It also displays an icon to the left of the banner that identifies the content as an article or a discussion when either is selected.

1. Select the **Headline** component in the page you're configuring.
2. In the property editor, configure properties for the component:

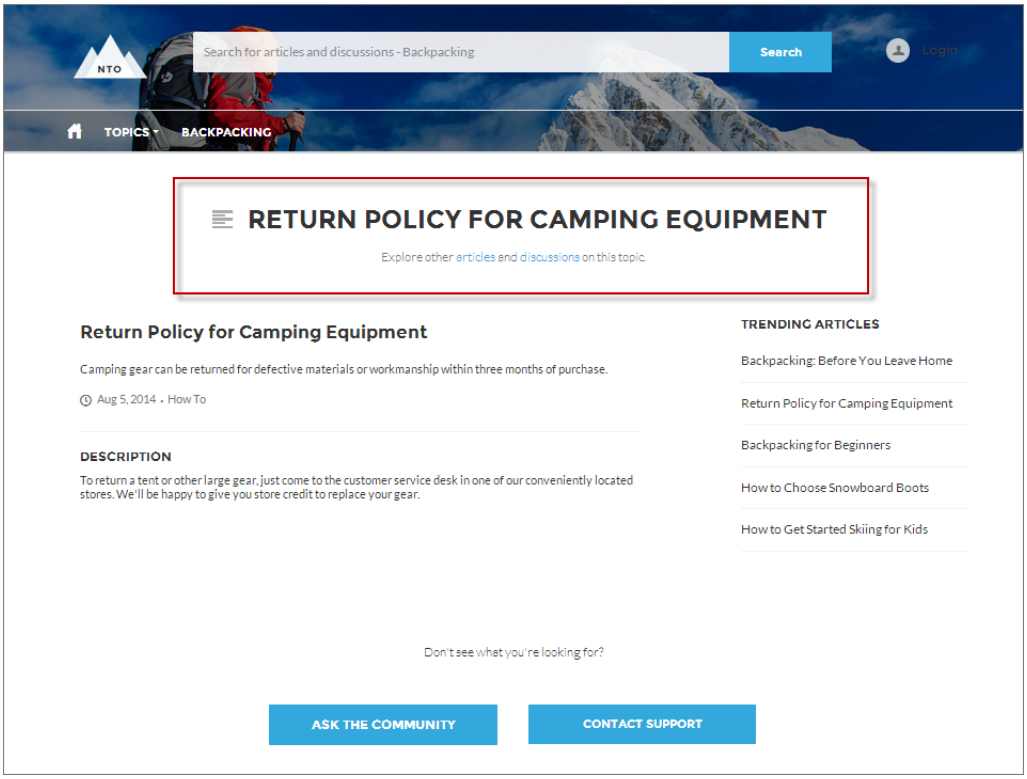
Property	Details
`Title`	Enter the static text for the page's headline. The default text for the page is `Welcome!`.
`Banner Text`	Enter the static text that appears on the home page. The default text is `A place where you can easily find solutions and ask questions.`
`Page Type`	Enter the type of content that the page displays in this page. Type either *`article`*, *`topic`*, or *`discussion`* to retrieve the title of the page and display an icon identifying the type of page the user is viewing.
`Unique Name or ID`	The system retrieves the ID from the URL of the question or article when it's selected.
`Banner Text with Articles and Discussions`	Enter the static text and link text that lets users select a page that shows articles or discussions. This text and links in this field appear on the page when Salesforce Knowledge is enabled and set up in your organization. You can translate and change the value of each component, but not the position of the component. `Explore other <a href="javascript:void(0)" class="headlineArticles">articles</a> and <a href="javascript:void(0)" class="headlineDiscussions">discussions</a> on this topic`

Property	Details
`Banner Text with Discussions`	Enter the static text and link text that lets users select a page that shows discussions only. This text and link in this field appear on the page when Salesforce Knowledge isn't enabled in your organization. You can translate and change the value of each component, but not the position of the component. `Explore other <a href="javascript:void(0)" class="headlineDiscussions">discussions</a> on this topic`
`Show Subtopics`	Below the headline, displays links to topics that are children of the current topic. (On mobile devices, these links appear in a Subtopics menu.) Only navigational topics support parent-child relationships.

If you have set up navigational subtopics, change the following properties in the property editor to populate topic and subtopics dynamically on the topic detail page:

Property	Details
`Title`	Enter *`{!topicName}`* to retrieve and display the topic name on the topic detail page.
`Page Type`	Enter *`topic`* as the page type.
`Show Subtopics`	Select this option to display subtopics.

Example: Sample Headline component:



SEE ALSO:

Which Components Can I Use with Each Template?

HTML Editor

The HTML Editor component lets you create and edit custom content in HTML.

1. In Community Builder, drag the HTML Editor component from the Components panel onto the page.

EDITIONS

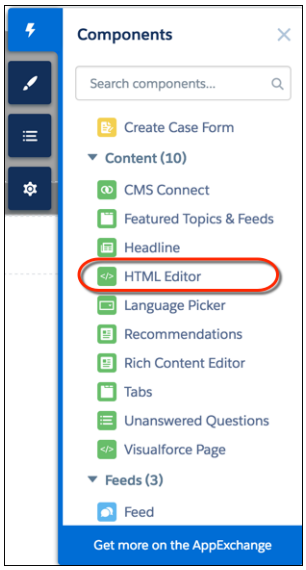
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

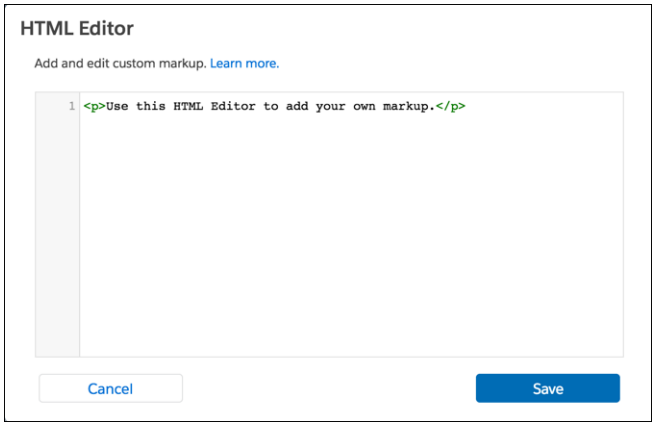
USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



2. Add and format HTML content.



The HTML Editor component supports the following HTML tags and attributes. Any exceptions are flagged in your markup.

Tags: a, abbr, acronym, address, area, b, basefont, bdo, big, blockquote, br, button, caption, center, cite, code, col, colgroup, dd, del, dfn, dir, div, dl, dt, em, fieldset, font, form, h1, h2, h3, h4, h5, h6, hr, i, iframe, img, input, ins, kbd, label, legend, li, map, menu, ol, optgroup, option, p, pre, q, s, samp, select, small, span, strike, strong, sub, sup, table, tbody, td, textarea, tfoot, th, thead, tr, tt, u, ul, var, xmp

Attributes: abbr, accept, accept,-charset, accesskey, action, align, alink, allowfullscreen, alt, autocomplete, axis, background, bgcolor, border, cellpadding, cellspacing, char, charoff, charset, checked, cite, class, classid, clear, code, codebase, codetype, color, cols, colspan, compact, content, coords, data, datetime, declare, default, defer, dir, disabled, download, enctype, face, for, frameborder, frameborder, headers, height, href, hreflang, hspace, http-equiv, id, ismap, label, lang, language, link, list, loop, longdesc, low, marginheight, marginwidth, max, maxlength, media, method, min, mozallowfullscreen, multiple, name, nohref, noresize, noshade, novalidate, nowrap, open, optimum, pattern, placeholder, poster, preload, pubdate, radiogroup, readonly, rel, required, rev, reversed, rows,

rowspan, rules, scheme, scope, scrolling, selected, shape, size, span, spellcheck, src, srclang, standby, start, step, style, summary, tabindex, target, text, title, type, usemap, valign, value, valuetype, version, vlink, vspace, webkitAllowFullScreen, width, xmlns, data-*

SEE ALSO:

Rich Content Editor

Featured Topics & Feeds

The Featured Topics & Feeds component gives members access to Featured Topics, Discussions, and My Feed in a tabbed setting. Community members must be logged in to see the My Feed tab. The Featured tab shows the featured topics you configured in the Content Management Workspace. You can boost your brand by providing images for featured topics. Topics and images are displayed as tiles on the Featured tab.

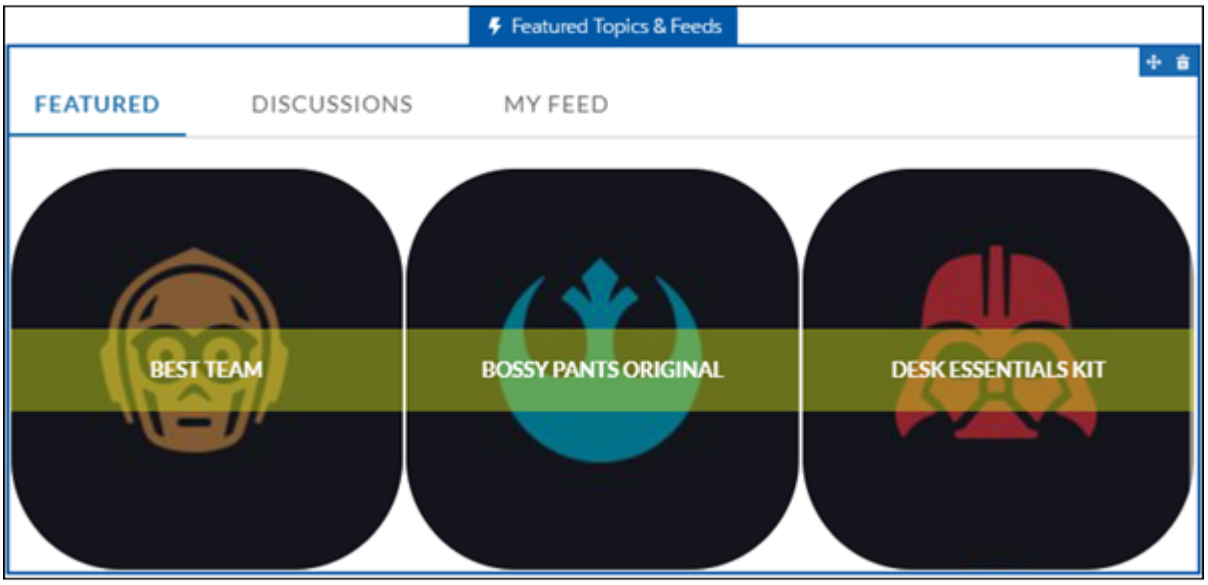
Note: Before Summer '16, this component was named Home Page Tabs.

1. Select the **Featured Topics & Feeds** component in the page you're configuring or drag the component from the Components panel to the page.
2. In the property editor, configure properties for the component:

Property	Details
`Featured Tab Label`	Enter a label for the Featured Topics tab. The default label is `Featured`.
`Discussion Tab Label`	Enter a label for the Discussions tab. The default label is `Discussions`.
`My Feed Label`	Enter a label for the My Feed tab. The default label is `My Feed`.
`Default Sort Order for Discussion Feed`	Present community members and guests with the initial feed sort order that you intend. If users change the sort order in their view, their selection sticks.
`Compact Feed in Discussion Tab`	Use the compact version of the feed on the Discussions tab. Compact feeds show only question titles and make it easier for users to scan the feed. Compact feeds don't support filters.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is *`0,0,0,0.4`*.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the community's theme. In Builder, you can test hover colors in Preview mode.
`Border Radius`	Slide to adjust the curve of the border around each featured topic tile. Note: If the component is in a narrow container, a round radius tends to look more oval. If you set border radius to *`50`*, very round, we recommend that you set Text Position to *`Left`*, *`Right`*, or *`Center`*. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.

Property	Details
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Builder, you can test hover colors in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it is inactive. In the property's **rgba** field, the default is `0,0,0,0`.
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is `0,0,0,0`. In Builder, you can test hover colors in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • `Top Left` • `Top Center` • `Top Right` • `Left` • `Center` • `Right` • `Bottom Left` • `Bottom Center` • `Bottom Right`
`Text Alignment`	Set alignment of text within the text background. Select `Center`, `Left`, or `Right`. Note: Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Sample Featured Topics & Feeds component:



SEE ALSO:

Which Components Can I Use with Each Template?

Event Insights

Use the Event Insights Community Builder component to show Salesforce IoT data to your Lightning community members.

Salesforce IoT and Event Insights must be enabled for your org. Before you can add the Event Insights component, create and activate an orchestration in Salesforce IoT.

1. Select the **Event Insights** component under Records in the page that you're editing.
2. In the property editor, configure the component's properties.

Property	Details
`Orchestration`	Choose the orchestration that contains the variables you want to show.
`Iot Variables`	Select the variables to display.

Note: This component is available only in Lightning Experience and only in English.

Knowledgeable People

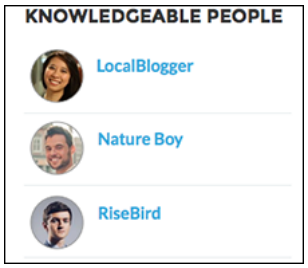
Highlight topic experts so the community can direct questions straight to them. The Knowledgeable People component displays up to five experts, chosen based on factors such as best answers, mentions, or likes on questions and posts.

In the Page Editor, you can configure the Knowledgeable People component on Topic View pages.

1. Select the **Knowledgeable People** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the component. The default text is `Knowledgeable People`.
`Topic ID`	The default entry, `{!topicId}`, displays unique knowledgeable users for each topic. To instead display knowledgeable users based on a specific topic, enter the topic ID.

Example:



For communities created in Spring '15 or earlier, complete these steps to add the Knowledgeable People component:

1. From the community, click in the global header.
2. Click **Administration** > **Preferences**, and select **Enable knowledgeable people on topics**.
3. Click **Administration** > **Pages**, and go to Site.com Studio.
4. In the Site Pages section, double-click the **main** page.
5. In the Views tab at left, double-click **Customer Service Topic View**.
6. Click the Page Elements tab , and search for the Knowledgeable People component.
7. Right-click the component, and place it in the `div.cSecondaryContent` section.

SEE ALSO:

Which Components Can I Use with Each Template?

Language Selector

The Language Selector component lets guest users select their preferred language on a page in your community.

You can add the language selector to the header or footer, or to any section of any page; it's not included on any pages by default. Only guest users see the language selector. For authenticated users, the community automatically displays in their profile language. For guest users, the community displays in the community default language. Customized labels and knowledge articles use the translations added by the community admin in Translation Workbench.

If guest users want to view the community in a different language, they can select their preferred language using the language selector. The language selector shows all languages supported in the community. When the user selects a language, the page reloads in that language.

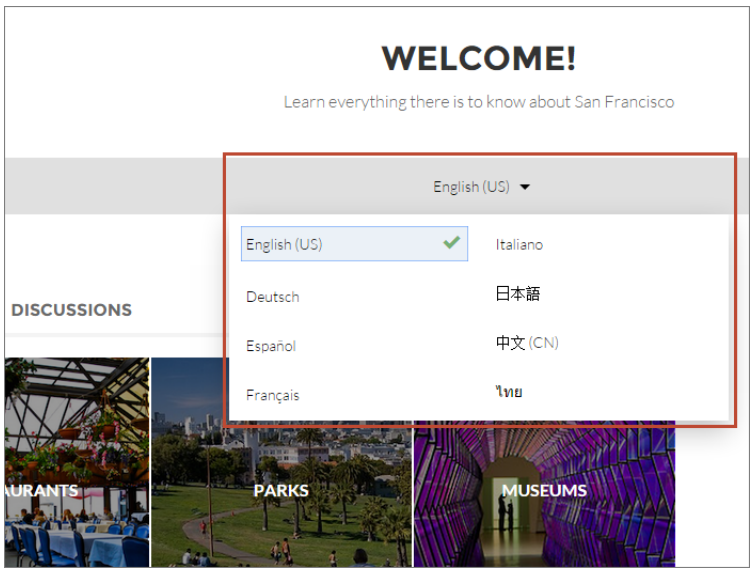
Note:

- The Language pane in Site.com Studio shows the default language and the list of languages supported in the community. If no languages apart from the default language have been set in Site.com Studio, the language selector shows the default language without a drop-down option. To learn more about setting site languages in Site.com Studio, see Create a Multilingual Site.
- To see the list of languages that guest users see, go to the Branding Editor in Community Builder. Make sure you're on a page that contains the language picker. Then click the drop-down icon on the language picker.
- Before Summer '18, Language Selector was named Language Picker.

1. Select the Language Selector component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Label`	Text that identifies this component on a page, which helps increase accessibility. Default text is *`Preferred Language`*.
`Button Label Alignment`	To specify how the language picker's label is aligned on the button, select *`Left`*, *`Center`*, or *`Right`*. The default value is `Center`.

Example: Sample Language Selector component with drop-down language list visible:



SEE ALSO:

Which Components Can I Use with Each Template?

Lead Inbox

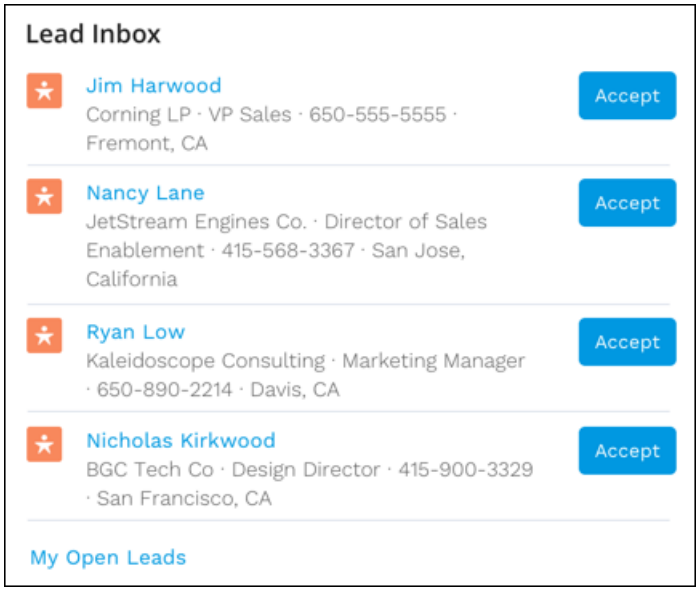
Use the Lead Inbox component to share a common pool of leads with partners in your community.

The lead inbox uses a queue and the list view associated with a queue to pass leads to partners. Partners included in the visibility settings for the queue and list view can see and accept leads from the Lead Inbox. Accepting a lead makes the user the owner of the lead.

1. Click the Lead Inbox component on the page you're configuring. By default, the Lead Inbox component lives on the Home page of the Partner Central template.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Specify a title for the lead inbox. The default title is `Lead Inbox`.
`Number of Leads`	Specify the number of leads to display in the lead inbox. The default value is `5`.
`Sort Order`	Select a sort order for the list of leads. You can sort by the date on which the lead was created, ascending or descending.
`Link to the leads list view`	Select to show a link to a lead list view on the lead inbox.
`Linked List View`	If you selected the previous option, specify the leads list view you'd like to show a link for. By default, the first leads list view in the org is selected.

Example: Sample Lead Inbox Component



SEE ALSO:

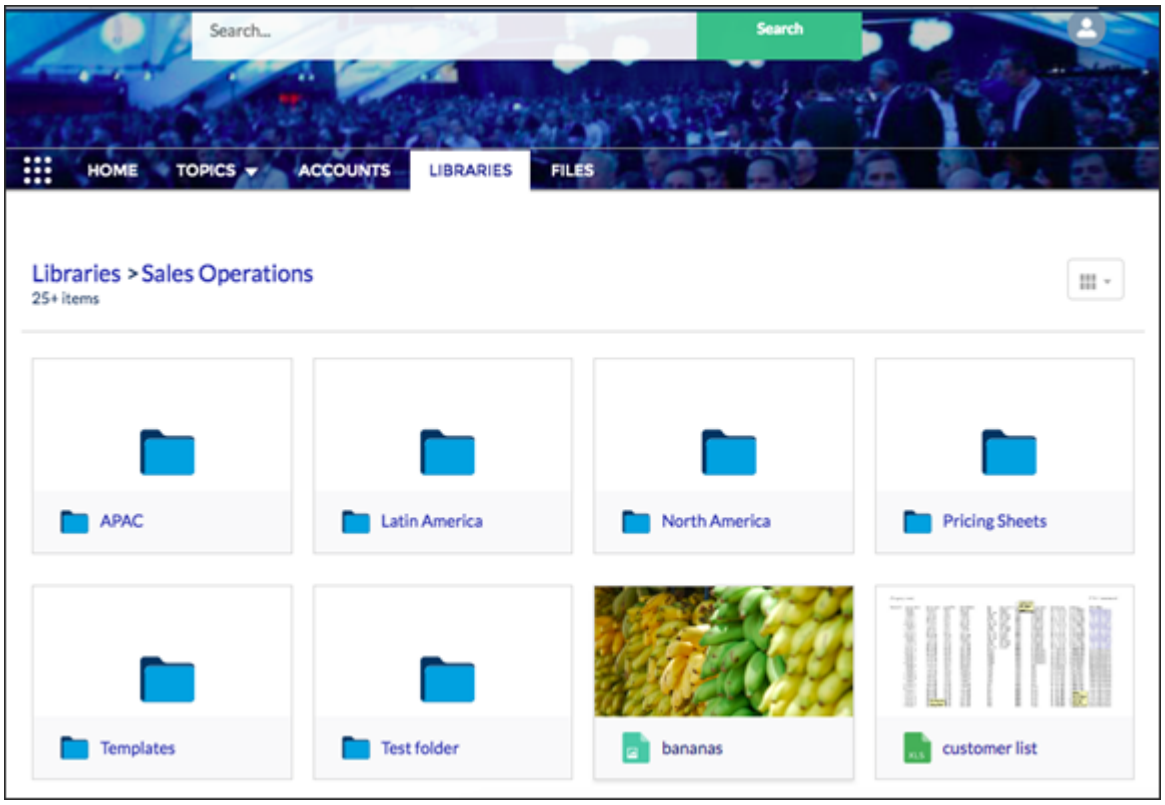
Which Components Can I Use with Each Template?

Libraries

Give access to your libraries to community members using the Libraries component. Use this component in Customer Service, Build Your Own, Partner Central, and Customer Account Portal templates.

Community members view and open libraries they have access to, either in a list view or a tile view. Drill down inside libraries and folders, and the files display as thumbnails, making it easy to spot a colorful spreadsheet or perfect photo. The Libraries component doesn't have any properties to edit, and can be used on any page that isn't already using the Files List component.

Example: Sample Libraries component



Member Profile and Settings

The Member Profile component allows community members to easily edit their account information. And the best part is that all a member's important information is in one place—profile information and various settings in one handy component. What does that mean for you and your business? Fewer phone calls into your call centers for simple updates.

The Member Profile component uses a default image in the header. Using the component's properties in Community Builder, you can choose to not show the default image.

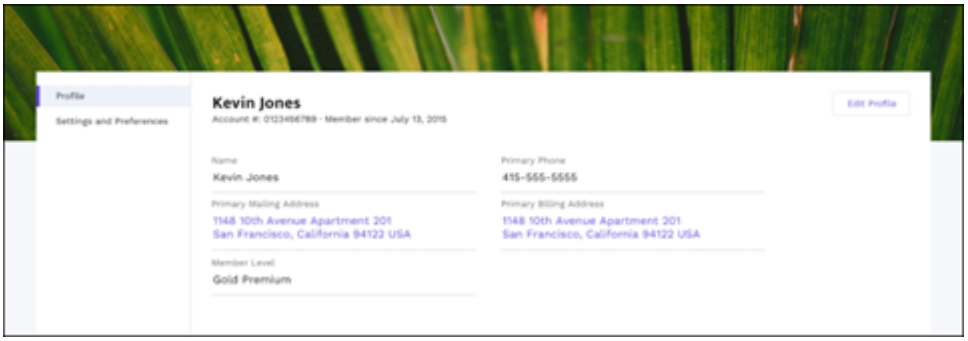
The fields you see in the Member Profile component are set in Salesforce setup **Setup** > **Users** > **Page Layouts** > **User Profile Page Layout**.

Use the Member Profile component on the User Profile page of communities made using the Customer Account Portal.

1. Select the **Member Profile** component in the page you're configuring.
2. To view the component properties, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show banner image at top`	Shows a banner image at the top of the Member Profile component. If unselected, no banner image is seen.
`Edit Banner Image`	Choose a banner image to show at the top of the Member Profile component.
`Show Settings tab`	Show the Settings tab on the component.
`Profile Tab Label`	Enter a label for the Profile tab. The default text is *`Profile`*.
`Settings Tab Label`	Enter a label for the Settings tab. The default text is *`Settings & Preferences`*.

Example: Sample Member Profile component.



Membership

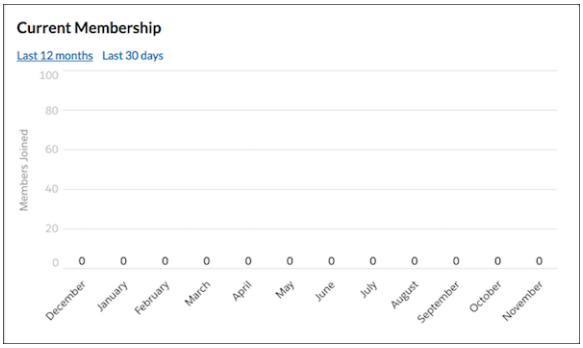
The Membership component displays the number of new group members, either in the past 30 days or the past 12 months.

The Membership component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Membership** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Message Notification

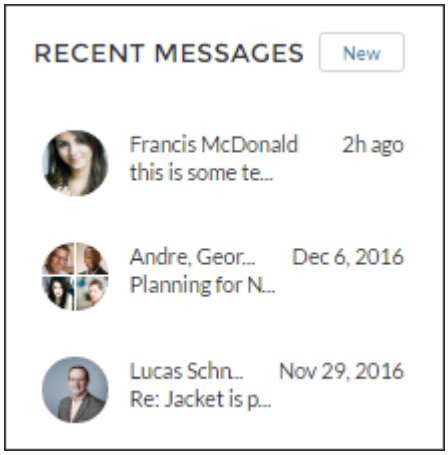
Add the Message Notification component to your community pages to let users view their recent messages from outside the Messages list view. The Message Notification component shows up to three recent messages and allows users to send new messages.

Add the Message Notification component to the community Home page and configure it in the Page Editor.

1. Select the **Message Notification** component.
2. In the property editor, configure properties for the component:

Property	Details
`Header Label`	Enter a title for the component. The default text is *`Recent Messages`*.

Example: Sample Message Notification component:



SEE ALSO:

Which Components Can I Use with Each Template?

Navigation Bar

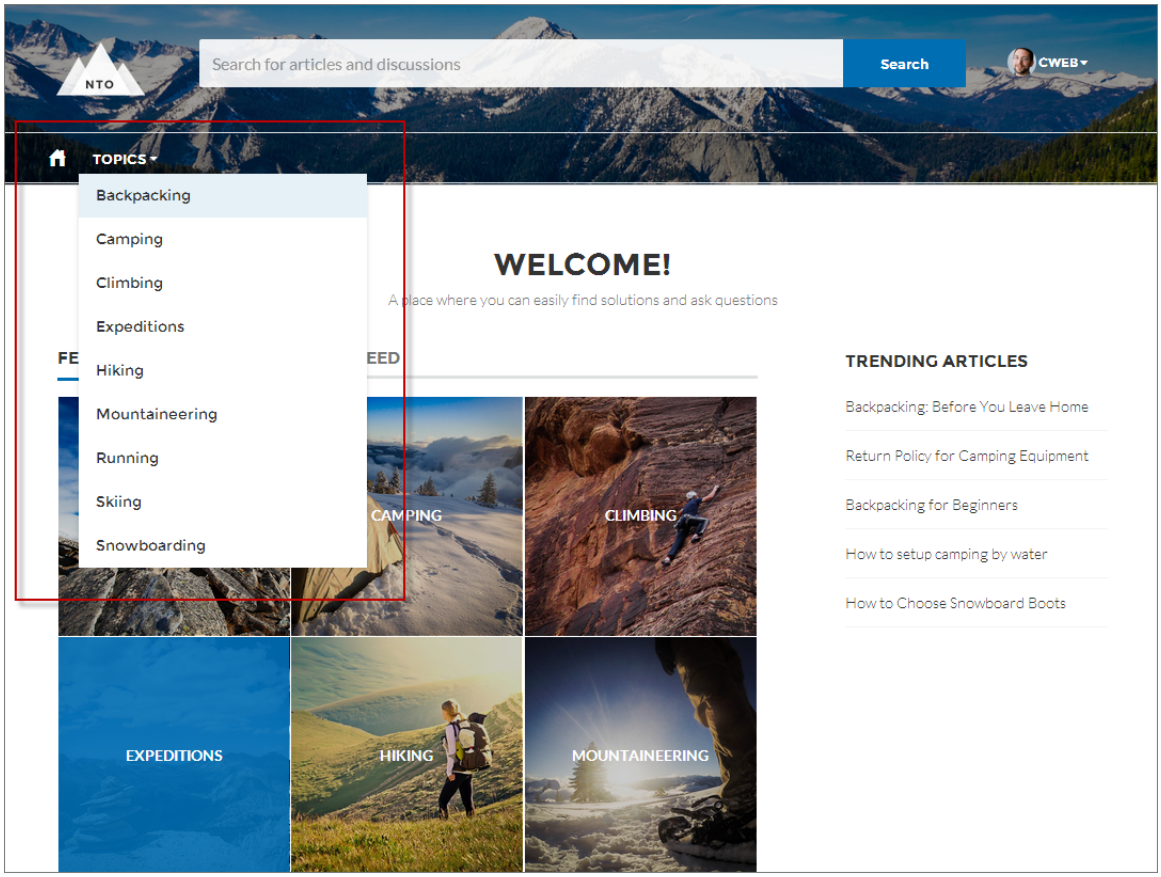
The Navigation Bar component lets users select different topics to browse and provides navigation back to the community home page.

If your Customer Service template version is Winter '16 or later, this component is replaced with the Navigation Menu component.

1. Select the **Navigation Bar** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Topic Menu Label`	Enter the text you want to appear as the label for the drop-down list of topics that appears in the navigation bar.

Example: Sample Navigation Bar component:



SEE ALSO:

Which Components Can I Use with Each Template?

Navigation Menu

The navigation menu component extends your community's navigation beyond navigational topics. Navigation menu items can include Salesforce objects, topics, pages in your community, URLs to external sites, and menu labels. Menu labels are parent headings under which you can nest other menu items. You can also enable the App Launcher to make it easy for members to switch between their communities and their Salesforce org.

When setting up the navigation menu, consider the following:

- You can add up to 20 navigation menu items. Menu items that don't fit on the first line of the navigation menu appear in a `More` overflow menu item.
- If you want to map a navigational topic to a menu item, you must first set it up in Community Management.
- To add a custom page as a navigation menu item, you must first publish the community.

To create or modify navigation menu items:

1. Select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing communities, deselect **`Hide App Launcher in community header`**.
3. To show an icon for Home instead of text, select `Replace Home text with icon`.
4. In the property editor, click **Navigation Menu**.

   In the menu editor overlay, you can edit or delete existing menu items, or add new ones.
5. To add a menu item:
   a. Click **Add Menu Item**.
   b. Enter the name you want to use in the navigation menu for this item.
   c. Select the type of item you're navigating to.

      Options include:

      - Community Page—Links to a page inside your community using a relative URL. For example, *`/contactsupport`*.
      - External URL—Links to a URL outside of your community. For example, *`http://www.salesforce.com`*.
      - Menu Label—Adds a parent heading for your navigation menu. Nest items underneath the menu label.
      - Navigational Topic—A drop-down with links to the navigational topics in your community. Navigational topics are set up in Community Management.
      - Salesforce Object—Available objects include accounts, cases, campaigns, contracts, contacts, dashboards, groups, leads, opportunities, orders, price books, products, quotes, reports, tasks, work orders, and any custom objects.

        Tip: Select this option to create a list view page for the selected object. This option is the easiest way to expose Salesforce record data in your community with minimum configuration.

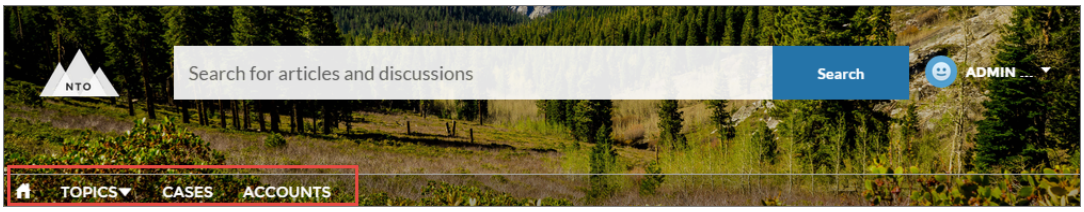
   d. Complete the fields based on the type you selected.

      - If you selected Salesforce Object, select the default list view to show.
      - If you selected Community Page, use the drop-down to select the community page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
      - To add the Messages page to your navigation menu, replace the `:messageId` parameter with *`Home`*.
      - If you selected External URL, enter the fully qualified URL. To keep navigation within your community, select the `Open link in the same tab` checkbox.
      - Select **Publicly Available** if you want the navigation menu item to show for guest users that aren't members of the community.
6. To move an item, click and drag the item to where you want it to appear in the menu. Nest other menu items underneath a menu label by dragging them to the right under the menu label.
7. To delete a menu item, hover over or click the item and click .
8. Save your changes.

If your community is already active, you see a Publish Changes button. **When you click this button, your new navigation menu changes are immediately visible to community members.**

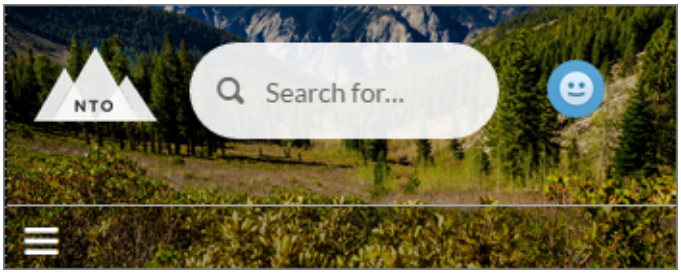
If your community is still in Preview status, you see a Save Changes button. When you click this button, your changes are saved and are visible to your community when you activate it.

Example: Sample Navigation Menu component:



On a mobile device, your community navigation menu collapses to better fit your screen.

Sample Navigation Menu component on a mobile device:



If your community hosts users who speak different languages, you can translate your navigation menu using the Translation Workbench. For information on using the Translation Workbench, see "Translate Terms" in the Salesforce help.

SEE ALSO:

Which Components Can I Use with Each Template?

New Message Button

The New Message Button lets community members start a direct message conversation from wherever you place the button.

Add the New Message Button component to a community page and configure it in the Page Editor.

1. Select the **New Message Button** component.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The ID of the recipient. The system attempts to detect and populate this value based on the page where the New Message Button is placed.
`Label`	Enter a title for the component. The default text is *`Send Message`*.

Example: Sample New Message Button component:

SEE ALSO:

Which Components Can I Use with Each Template?

Path (Lightning Community Component)

On object detail pages in Lightning Communities, use the Path component to indicate and mark the path through a business process.

You can add the Path component to Lightning Community object detail pages for the following objects:

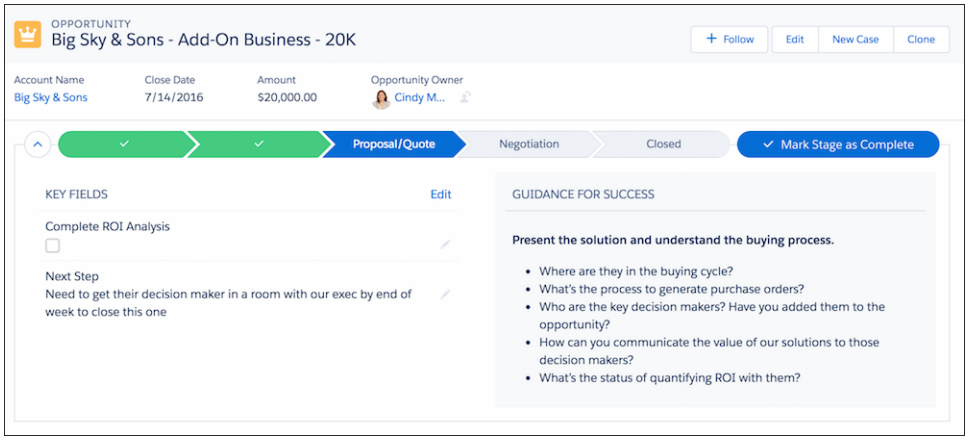
- Account
- Campaign
- Contract
- Lead
- Opportunity
- Order
- Partner Fund Allocations
- Partner Fund Claims
- Partner Fund Requests
- Partner Marketing Budgets
- Service Appointment
- Work Order
- Work Order Line Item
- Custom objects

For an overview of setting up Path in Salesforce, see Guide Users with Path. The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best.

Note: To make paths available on mobile devices, configure a custom path for mobile. In the mobile app, Path supports leads and opportunities only.

1. Set up a sales process in your org. If you're creating a path for service appointments, work orders, or work order line items, you can skip this step.
2. Set up the path in the Setup menu.
   a. From Setup, enter **Path** in the `Quick Find` box, then select **Path Settings**.
   b. Click **Enable**, and then click **New Path** to create a path.
3. Create object pages in Community Builder (for any object that supports Path).
4. Drag the **Path** component onto the detail page that you're configuring.

Example: Sample Path component:



SEE ALSO:

Which Components Can I Use with Each Template?

Paused Flows

Add the Paused Flows component to let your Lightning community members view all the paused flows they own, resume them at a more convenient time without losing their work, or delete them. When setting up a flow in Salesforce Setup, you must choose pause points in order to allow community users to pause and resume flows.

To pause a flow, your community members must have the **Run Flows** permission.

For example, your financial company has a flow to help folks apply for a credit card. Your customer gets stuck on one of the steps (what *was* my address 12 years ago?). Rather than lose the previous screens of information, the customer can press **Pause** to find the needed information. Or, your customer pauses a step and needs help to continue with the forms. The customer can contact your company, and a service agent can continue the flow for them.

In **Setup** > **Process Automation Settings**, select **Let users pause flows**. Once you set up a pause point in your flows, you can use the Paused Flows component in the Community Builder.

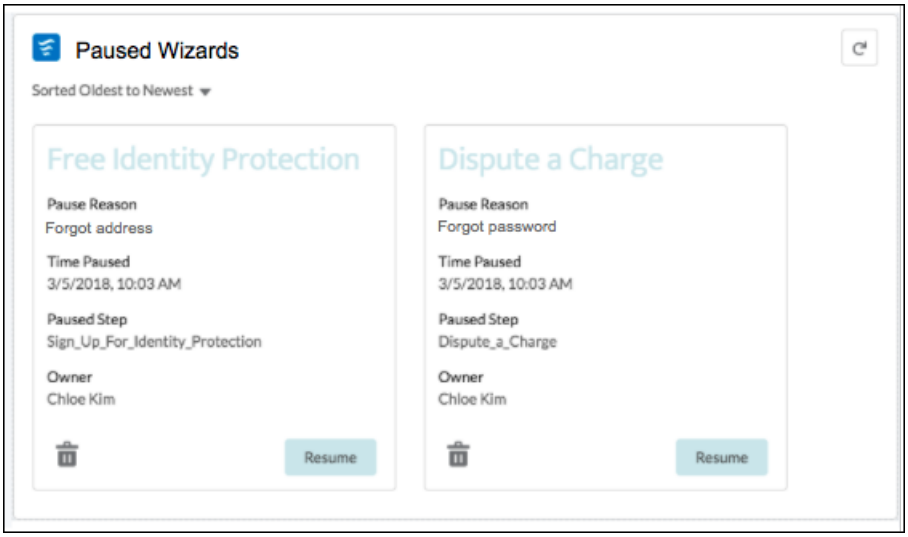
Note: While we call them flows here at Salesforce, your company could call them processes, forms, steps, or wizards. Use a naming convention that your customers understand for the title field.

1. Select the **Paused Flows** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Add a title that is easily understood by your community members. Default text is **Paused Flows**.
`Show number of flows in title`	Select to show the number of paused flows in the title, in parentheses.
`Maximum Paused Flows Displayed`	The maximum number of flows shown in the component is 10.

Property	Details
`Show pause reason`	Shows the reason the flow was paused.
`Show pause time`	Displays the time the flow was paused.
`Show pause step`	Displays the name of the step that the flow was paused.
`Show owner`	Displays the flow's owner.
`Delete button`	Displays a delete button to delete the flow.
`Resume Button Label`	The button text to resume a flow. Default text is **Resume**.
`Button Alignment`	Choose the button alignment. Default is **Center**.

Example: Sample Paused Flows component:



Profile Header

The Profile Header component displays a user's name (or nickname) and profile picture. It also displays a drop-down that lets users navigate to their profile, open a case, access their locale and email notification settings, or log out of the community. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Important: The User Profile Menu component replaces the Profile Header component in communities based on Winter '18 and later versions of Lightning community templates.

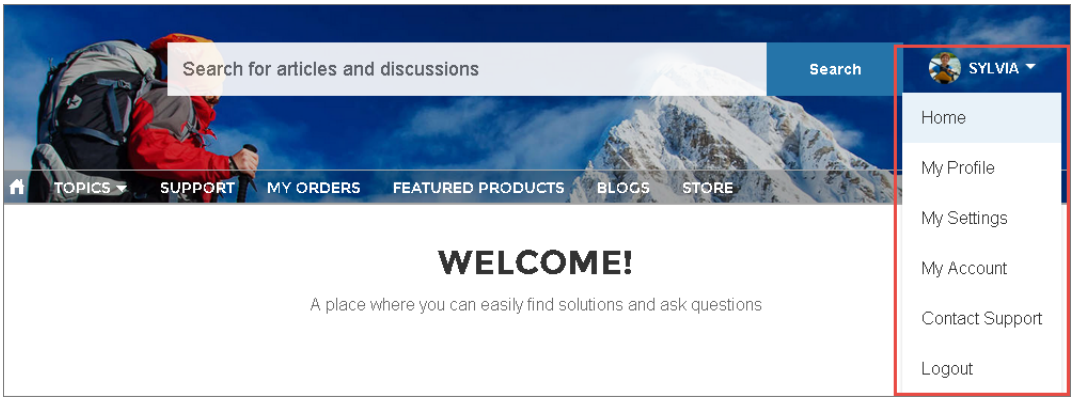
Users can't customize the profile photo functionality in the profile header—they need to edit all profile information from the profile details page.

Note: If nickname display is enabled in the community, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the community.

1. Select the **Profile Header** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Case Filter Name or ID`	The name or ID of the list view that displays the user's cases. This value is used throughout the community to display the user's list of cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select this checkbox to include the option to contact an agent from the profile.
`Home Label`	Enter the text you want to show for the link to the community home page from the user navigation menu. The default text is *`Home`*.
`View Profile Label`	Enter the text you want to show for the link to the profile detail page. The default text is *`View Profile`*.
`Contact Support Label`	Enter the text you want to show for the link to the page where the user can open a case. The default text is *`Contact Support`*.
`Login Label`	Enter the text you want to show for the link to log in to the community. The default text is *`Login`*.
`Logout Label`	Enter the text you want to show for the link to log out from the community. The default text is *`Log Out`*.
`Community Management`	Enter the text you want to show for the link to the Community Management page. The default text is . This link only appears for users with permissions to manage the community.
`Community Setup Label`	Enter the text you want to show for the link to the setup page for communities. The default text is *`Community Setup`*. This link is shown to users with permissions to create or modify the community's administration settings.
`User Settings` (Customer Service template only)	Enter the text you want to show for the link to access an authenticated user's personal settings for the community. The default text is *`My Settings`*.
`Show User Settings in Menu` (Customer Service template only)	Select this checkbox to show user setting in the profile drop-down list.
`My Account Label` (Customer Service template only)	Enter the text you want to show for the link that external users click to view their account record. The Default text is *`My Account`*. This feature is available in the Spring '16 version of the Customer Service template and later. Note: External community members who access the My Account link see their account details based on the configuration of the Record Detail page.

Example: Sample Profile Header component:



SEE ALSO:

Which Components Can I Use with Each Template?

Recognition Badges

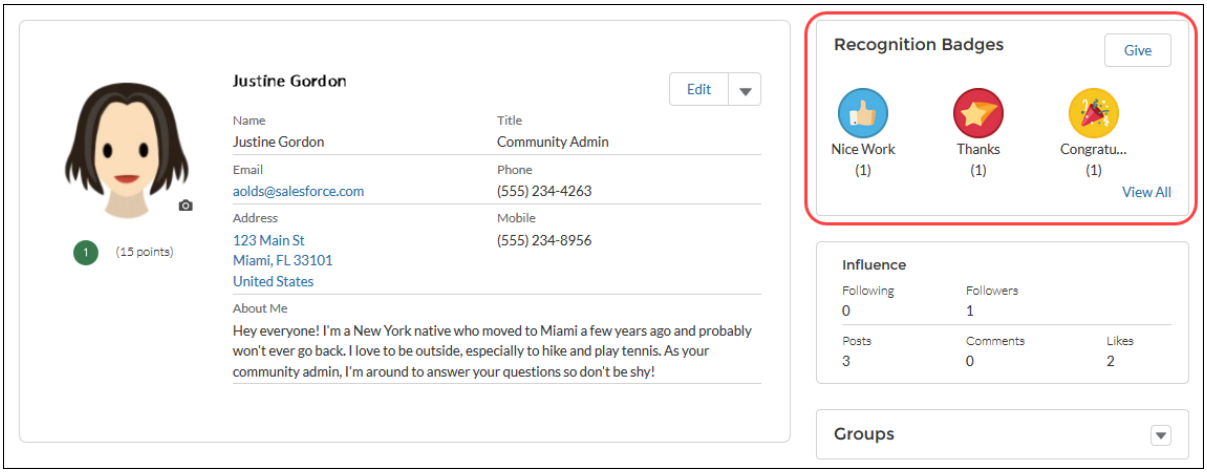
The Recognition Badges component displays up to three of the most recent badges earned by a user, the Give Badge button, and a link to view all of a user's badges.

From the User Profile page in Community Builder,

1. Add the Recognition Badges component to the User Profile page.
2. In the property editor, configure properties for the component:

Property	Details
`Id`	The system supplies this value. Don't update this field.
`Title`	Enter a title for the component. The default text is `Recognition Badges`.
`Button Text`	Enter a name for the button that users click to give badges. The default text is `Give`. The Give button is only available if the **Give Recognition Badges in Lightning Communities** permission is turned on.

Example: Sample Recognition Badges component



SEE ALSO:

Which Components Can I Use with Each Template?

Recommendations

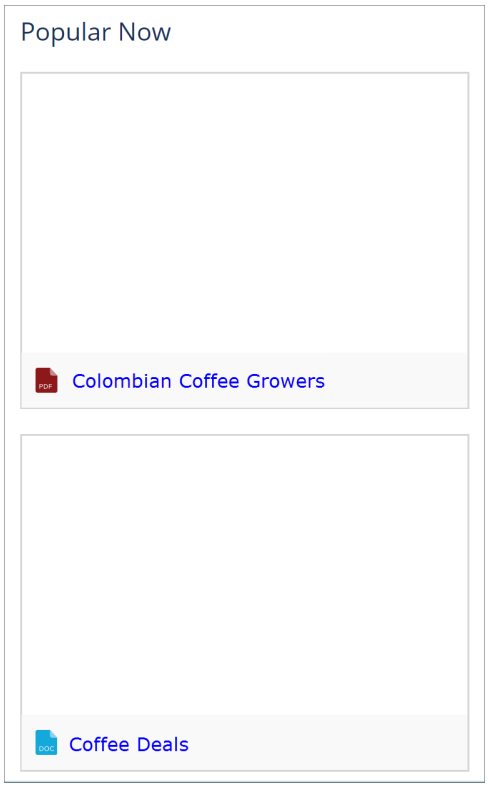
The Recommendations component displays the popular files for your community. Popularity is determined by the number of people who have recently viewed a file and whether the file includes text and is in a library.

The Recommendations component appears by default on the Resources page when a recommendation is available.

1. Select the **Recommendations** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the component. The default text is *`Popular Now`*.

Example: Sample Recommendations component



SEE ALSO:

Which Components Can I Use with Each Template?

Recommendations Carousel

The Recommendations Carousel component displays the custom recommendations and system-generated topic recommendations for your community.

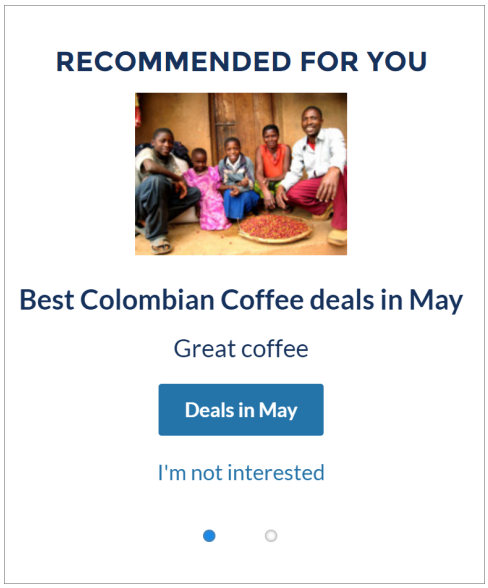
Note: Before Winter '18, this component was named Recommendations.

The Recommendations Carousel component appears on the page when a recommendation is available.

1. Select the **Recommendations Carousel** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the component. The default text is *`Recommended`*.
`Recommendation Channel`	Choose the recommendation channel. The default is *`Default Channel`*. To display recommendations that you created in a custom channel, choose that channel. Use these channel values; you can't rename or create other channels.

Example: Sample Recommendations Carousel component



SEE ALSO:

- Which Components Can I Use with Each Template?
- Customize Recommendations in Communities

Record Banner

The Record Banner component shows the record name, key record highlights, and action buttons that allow users to edit or delete the record.

Before Spring '16, this component was named Record Headline. The Customer Service template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (that uses a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Banner component along with the Record Information Tabs component to display record data.

- You can use the Record Banner component on custom record detail pages that you create. We recommend using it with the Record Information Tabs component.
- You can modify what fields display in the Record Banner component by customizing the Highlights Panel layout in the object's compact page layout.
- Community members with the necessary permissions can use the Edit and Delete buttons to modify or delete the record. These buttons don't display on mobile devices.

Note: For optimal appearance, choose a wide column width when placing this component on your community page.

1. From the Pages menu in Community Builder, select Record Detail or your custom record detail page.
2. Select the **Record Banner** component or drag the component from the Components panel to the page to add it.
3. In the property editor, configure properties for the component:

Property	Details
`Record ID`	The ID of the record displayed. Typically, this field is automatically populated.

Example: Sample Record Banner component in the Customer Service template.

SEE ALSO:

Which Components Can I Use with Each Template?

Record Detail

Use this component to share record details in a community built using the Customer Service template.

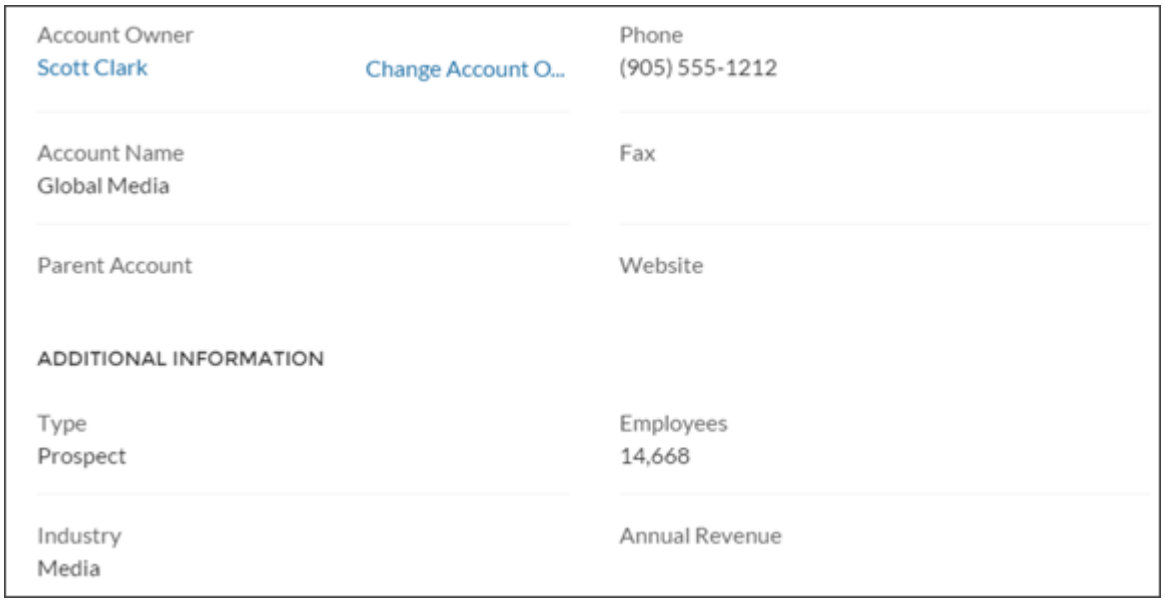
Simply drag the Record Detail component on a record detail or a custom page in the community, and it populates with record information stored in Salesforce. This component is a great way to share information with community members who need it most, like partners. Users accessing the community on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed. However, edit inline, available on desktop, will not function in mobile or tablet display.

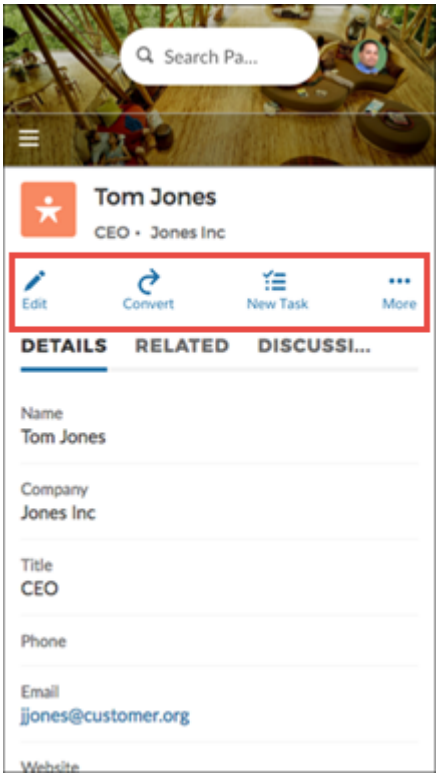
Note: To display the record feed, use one the feed components with the feed publisher component. To show the related records, use the Record Related List component. To show a combination of record details, related lists, and the record feed together, we recommend using the composite Record Information Tabs component.

1. Select the **Record Detail** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Record ID`	The record ID. Typically, this field automatically picks up the record ID when the page loads.

Example: Example of a Record Detail component on a community.





Example of actions on a mobile device.

Record Information Tabs

The Record Information Tabs component shows detailed record information, lists of related records, and the record feed.

Before Spring '16, this component was called Record Information. The Record Information Tabs component uses the Record Detail Page and the Record Banner component to display record data.

- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Related lists in the related tab show the number of related records in each list in parentheses. For example, if there are five related contacts associated to an account, the related list shows Contacts (5). If there aren't any related records, the list title shows (0).
- Community members with permissions can create new related records and send emails from the Related tab. They can also expand related record lists to see a longer list. These details are displayed on the generic Record Related List page. Related records in the related tab show the number of related records in parentheses.

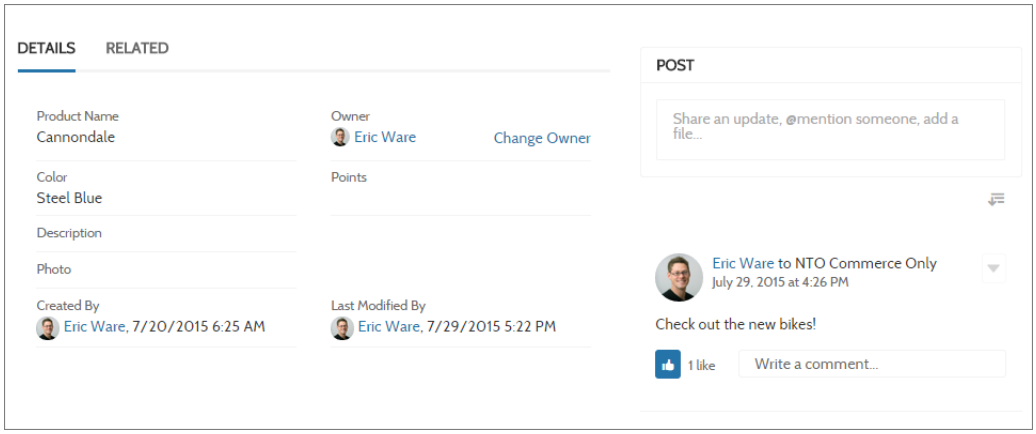
  Note: Emails are supported in accounts, contacts, leads, opportunities, and campaigns.

The Customer Service template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (that uses a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page.

1. From the Pages menu in Community Builder, select Record Detail or your custom record detail page.
2. Select the **Record Information Tabs** component or drag the component from the Components panel to the page to add it.
3. In the property editor, configure properties for the component:

Property	Details
`Record ID`	The ID of the record. This value is automatically populated.
`Details Tab Label`	Label for the tab that shows record details. The default label is Details.
`Related Tab Label`	Label for the tab that shows lists of related records. The default label is Related.
`Discussion Tab Label`	Label for the tab that shows the record feed. The default label is Discussions. This label is used on mobile devices only.

Example: Sample Record Information Tabs component.



SEE ALSO:

Which Components Can I Use with Each Template?

Record List

The Record List component shows a list of records on the Record List page. Users can view records, switch between record list views, and create records directly from the list view. If a user doesn't have access to a particular list view, they see the Recently Used list view instead.

Note: Before Spring '16, this component was named Record List View.

When you create a custom navigation menu item using the Salesforce Object type, it automatically links to a page that displays a list of the records for the selected object. Lightning community templates provide an out-of-the-box page to display such a list of records. This generic page is called the Record List page. It's used for all objects in your community that don't have a custom page assigned to them.

- The Record List component supports all Object Home page supported objects.
- You can use the Record List component on any page in your community. We recommend adding it to custom list views that you create. You can also create a navigation menu item to link to that page with its internal page URL.

1. Select the **Record List** component on the Record List page.
2. In the property editor, configure properties for the component:

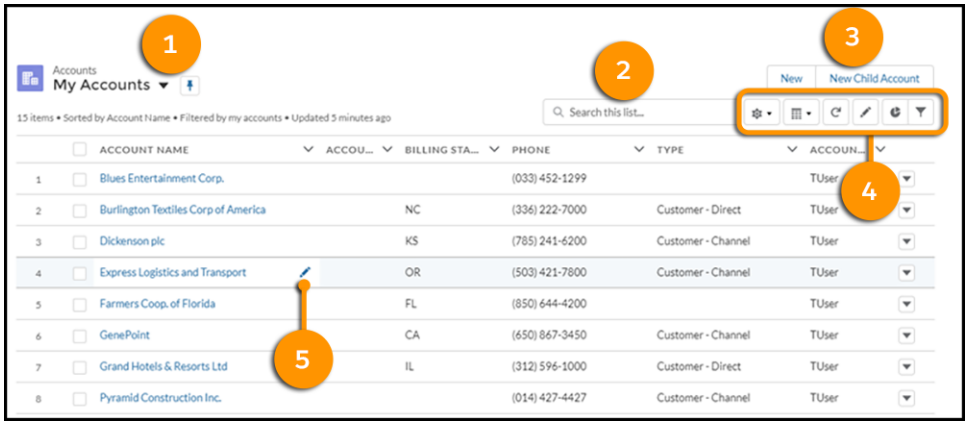
Property	Details
`Number of Records`	The number of entries retrieved to show in the list view. The default is 25. When the compact layout is selected, this property controls the number of records shown. If there are more than 25 records, users click a link to see the full list of records. The maximum number of records for the compact layout is 100. When the full layout is selected, this property controls the number of records initially shown. As a user scrolls down, more records are displayed. The maximum number of records per page for the full layout is 100.
`Layout`	Choose from full, standard, or compact layout. The compact layout is ideal for showing short lists of information in a narrow column or when displaying your community on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically switches to the compact layout. When choosing the layout, consider the following: • When using the full layout, use a column width of at least 50% of the page. We also recommend that you don't place another component below the Record List component on the page. – Full layout has a minimum height of 700 pixels. If you place a component below the full layout of the Record List component, the Record List component can overlap with the component below.

Property	Details
	– Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling can prevent community members from ever seeing the component below the Record List component. • Standard layout has some differences in display. – Only the first four fields of the list view are displayed. – When there is no data for the list view to display the Record List component is hidden. • Compact layout works in any size column. However, **View All** will always redirect to the object home (for example, case list or account list). It's recommended to create a standard page and add the compact list there to avoid issues when the full list for object home has been deleted.. Note: If there aren't records to display for either a standard or compact list view, the component is hidden.
`Object Name`	The Salesforce object whose records you want to show. The dropdown shows the supported objects. The component supports all Object Home page objects. See Objects Supported by Out-of-the-Box Components and Pages in Community Templates. If **Page's Object Name** name is selected, only `Page's Filter Name` will be available in the Filter Name field.
`Filter Name`	The list view to show for the selected object. The dropdown shows only list views that are valid for the object you select.
`Allow list pinning`[1]	Lets users select their preferred default view for a record list. Enabled by default. Lists, as elsewhere in Salesforce, can't be unpinned, but users can select a new list to change their default view. Note: Pinned lists always override menu and component list settings except when the navigation menu for a component receives its filter name from the name of the page—for instance, `My Accounts`. To allow users to see their pinned lists, create at least one additional menu item that takes `default` as the list view.
`Allow inline edit`[1]	Lets users edit individual fields in a list. Enabled by default.
`Show list actions`[1]	Displays available list view controls, such as new, sharing, filter, and any custom actions that you've created. Enabled by default. • Users require necessary permissions for the viewed object to use the **New** button on the component to create records. • For shared views, users need appropriate permissions to see the data. • Related Lists for Campaign members have quick filters to narrow results, but the resulting views can't be saved or shared.

[4] Available for Full layout only and therefore unavailable when viewed on mobile devices.

Property	Details
	• Community members can use search and quick filters to quickly find information in their current session. Users can click to filter the list view or remove filters. They can also click to view related charts.
`Show list search`[1]	Displays search field, scoped to the displayed list. Enabled by default.
`Show display options`[1]	Lets users view records in a table or Kanban format, or restricts them to a single type of view. Default is **Show All Options**.

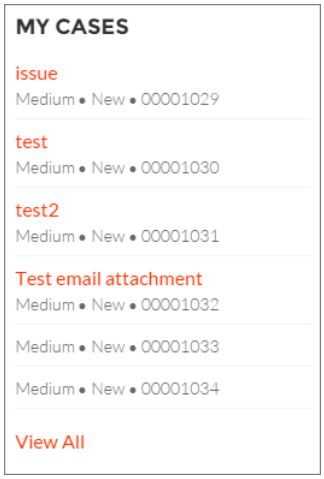
Example: Sample Record List component (Full layout):



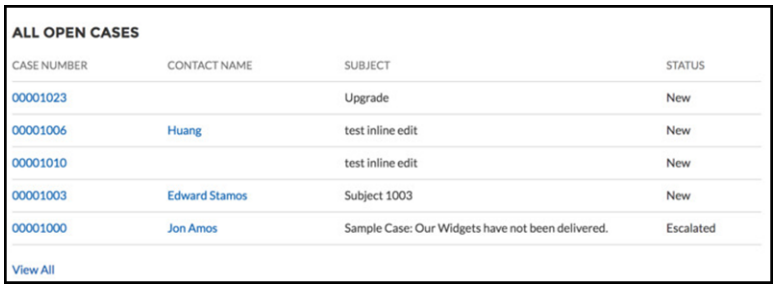
When all properties are enabled, community members can:

- Change the list view and pin it (1).
- Use search (2) to find items in long lists.
- Use list actions to accomplish list-related tasks, such as creating a record (3).
- Access list view controls (such as sharing settings), change how the list is displayed, view related charts, and filter the list view (4).
- Edit fields inline (5).

Sample Record List component (Compact layout):



Sample Record List component (Standard layout):



SEE ALSO:

Which Components Can I Use with Each Template?

Objects Supported by Out-of-the-Box Components and Pages in Community Templates

Record Related List

The Record Related List component shows a list of records that are related to a record. For example, if you're looking at an account, you can see a related list of contacts for that account. Use the Record Related List component on a record detail page or on a custom page to show a list of related records. Members can create records from the list and from lookups.

When a user expands the list of related records, the Related Record List page is displayed, which uses the Record Related List component under the hood. The component may occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

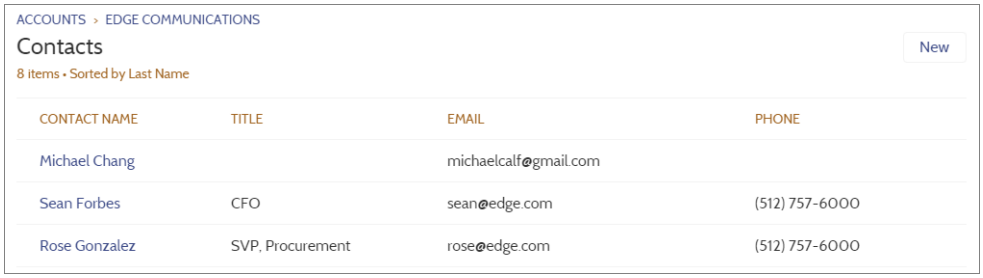
1. Select the **Record Related List** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Parent Record ID`	The ID of the parent record.
`Related List Name`	Name of the related list.

Property	Details
`Layout Design`	Layout width options to accommodate main body or narrow column placement of component.

Note: Related Lists for Campaign members have quick filters to narrow your results for fast results, but the resulting views can't be saved or shared.

Example: Sample Related Record List component:



Note: Record Related List row-level actions are not available on mobile for Lightning communities.

SEE ALSO:

Which Components Can I Use with Each Template?

Related List - Single

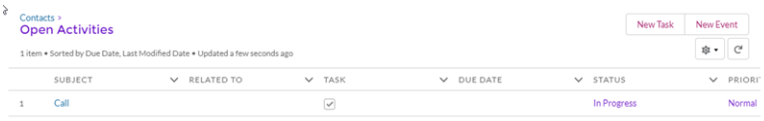
The Related List - Single component shows a list of related records based on one specific object. For example, if you're looking at a contact detail page, you can specify to see the cases related to that contact, without seeing all other types of related records. Use the Related List - Single component on an object page or on a custom page to add specific, related information in context for the page. Members can create records from the list and from lookups.

To see all related records, use the Record Related List component. When a user expands a related record, the detail page is displayed, which uses the Related List - Single component under the hood. The component may occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

1. Add the **Related List - Single** component to the page and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Related List`	The specific record type to retrieve and display for the page context.
`Layout Design`	Layout width options to accommodate main body or narrow column placement of your component.
`Change Related List Display`	Format presentation options for items in the list.

Example: Sample Related List - Single component:



Note: Row-level actions are not available on mobile for Lightning communities.

Related Articles List

The Related Articles List component displays the articles related to the article the user is viewing.

In the Page Editor, you can configure the Related Articles List component on the Article Detail page.

The component may occasionally be empty. For example, if there aren't any articles related to the current article, or if the current article was published in the last 24 hours, no related items populate the component.

1. Select the **Related Articles List** component.
2. In the property editor, configure properties for the component:

Property	Details
`Number of Articles`	Enter the maximum number of articles to display in the list. You can display up to 10 articles. The default value is 5.
`Title`	Enter a title for the list of related articles. The default text is `Related Articles`.
`Show Views`	Select to show the number of times an article is viewed 2. Clear to hide the view count.

Example: Sample Related Articles List component:

SEE ALSO:

Which Components Can I Use with Each Template?

Related Questions List

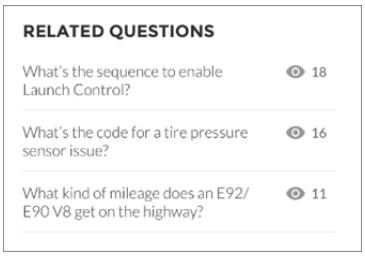
The Related Questions List component displays the questions related to the question the user is viewing.

In the Page Editor, you can configure the Related Questions List component on the Question Detail page. To use this component, your community must have a best answer for at least one question. The component may occasionally be empty. For example, if there aren't any questions related to the current question, or if the current question was asked in the last 24 hours, no related items populate the component.

1. Select the **Related Questions List** component.
2. In the property editor, configure properties for the component:

Property	Details
`Number of Questions`	Enter the maximum number of questions to display in the list. You can display up to 10 questions. The default value is 5.
`Title`	Enter a title for the list of related questions. The default text is `Related Questions`.
`Show Views`	Select to show the number of times a question is viewed, liked, or commented on, 2. Clear to hide the view count.

Example: Sample Related Questions List component:



SEE ALSO:

Which Components Can I Use with Each Template?

Related Topics List

The Related Topics List component displays the topics related to the topic being viewed by the user.

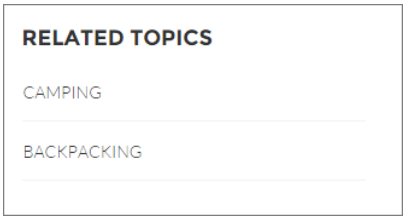
Note: Before Spring '16, this component was named Related Topics.

In the Page Editor, you can configure the Related Topics List component on the Topics View page.

1. Select the **Related Topics List** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the list of related topics. The default text is `Related Topics List`.
`Topic ID`	This field populates dynamically with the topic ID.
`Show the number of people using the Topic`	Shows the number of people who are using the topic.

Example: Sample Related Topics List component:



SEE ALSO:

Which Components Can I Use with Each Template?

Report Chart

Use the Report Chart component to add reports to your community pages. Display the reports that you set up in your Salesforce org's public folder.

When you click a report, you see the Report Detail page, which shows the Report Summary component. The report summary includes details from the source report in Salesforce.

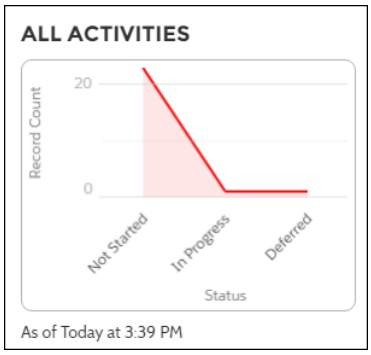
Note: In Report Chart properties, only the reports that have a chart appear on the dropdown list.

1. Drag the Report Chart component to the page, and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Report Name`	Reports with charts that are available for use in the community.
`Filter By`	Setting a filter on the report chart data is supported only for record pages. If you set a filter option, the Report Chart component displays only that filtered data to users.
`Refresh Time (Minutes)`	The number of minutes between each report refresh.
`Show report name`	Adds the report name to the community page.
`Show refresh button`	Shows a refresh button, so users can refresh the chart.

Warning: Instead of a report's developer name, the Report Chart component uses the ID of an associated report to populate the component. If a community page is deployed to another environment (such as from Sandbox to Production), the component breaks if the target org doesn't contain a report with the same ID. If the target org contains a different report that uses the same ID as the source org, the component references the wrong report.

Example: Report Chart component:



Report List

The Report List component lets users view reports in list form.

The report list can be filtered with these criteria:

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

In addition, users have access to report folders. Folders include:

- Created by Me
- Shared with Me
- All Folders

The Report List component doesn't have any editable properties.

Note: The Report List component can only be used on the Report List page.

Report Summary

The Report Summary component lets users see a snapshot of the report details from the source report.

Use the Report Summary component on the Report Detail page to see a report's details. Using the component, members can see a report chart, filter data, see the feed, refresh the report, or change its settings. Members with sufficient permissions can also clone, save, export, or subscribe to the report.

1. Select the **Report Summary** component in the Report Detail page.
2. In the property editor, configure properties for the component:

Property	Details
`Report Id`	This field autopopulates with the record ID of the report.

Reputation Leaderboard

The Reputation Leaderboard component displays a list of community members with the highest reputation points.

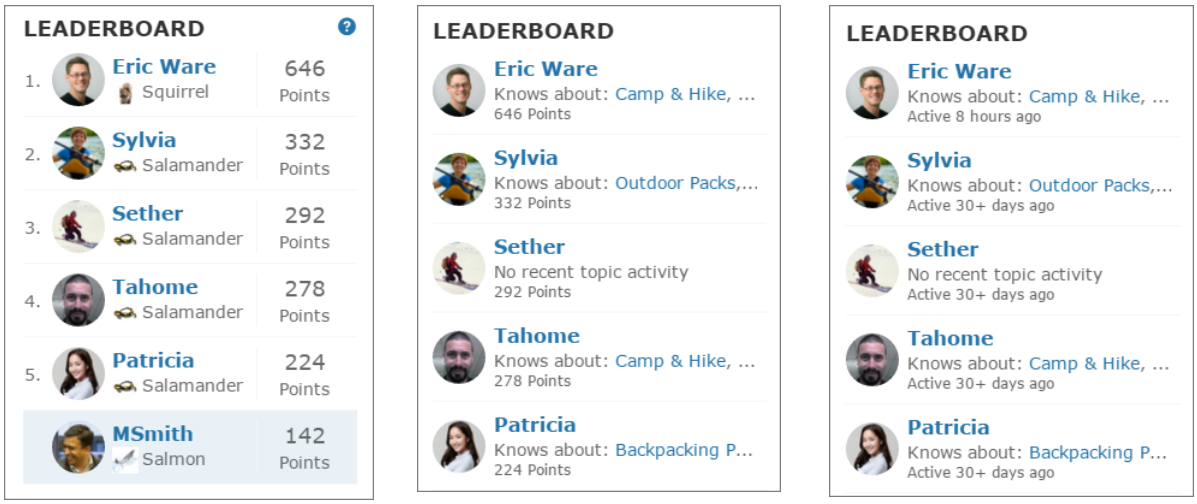
In the Page Editor, you can configure the Reputation Leaderboard component on the Home page.

1. Select the **Reputation Leaderboard** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the reputation leaderboard. The default text is `Leaderboard`.
`Number of Users`	Enter the maximum number of users to display. You can display up to 10. The default is 5.
`Show user rank`	Displays the ranks of the users shown in the leaderboard.
`Show logged-in user`	• If the logged-in user doesn't rank on the leaderboard, a row for the user appears at the bottom of the leaderboard. • If the logged-in user ranks on the leaderboard, AND the Show User Rank checkbox is selected, AND `Knowledge and Points` or `Knowledge and Last Active` is displayed, the user sees a message about their ranking. For example, "Congratulations! You rank #2."
`Show help bubble`	Displays a question mark icon at the top of the leaderboard that a user can hover over to get more info.
`Exclude internal users`	Excludes internal users from the leaderboard.
`Help Bubble Text`	Enter the message that appears when a user hovers over the question mark icon. The message can be up to 500 characters. The default text is `Earn points and climb to new levels when you contribute in the community!`
`Display Users':`	Determines what information about a user shows in the leaderboard. Options include: • Levels and Points—Shows a user's reputation level and total number of reputation points. • Knowledge and Points—Shows a user's total number of reputation points and topics that they're knowledgeable about. • Knowledge and Last Active—Shows topics a user is knowledgeable about and when the user was last active.
`Topic Knowledge Label (Up to 20 chars.)`	When Knowledge is shown in the leaderboard, this text appears before the topics a user is knowledgeable about. The default text is `Knows about`. For example, if a user is knowledgeable about backpacks, their leaderboard entry would say "Knows about: Backpacks."

Example: Sample Reputation Leaderboard component:

Level and Points **Topics and Points** **Topics and Last Active**



SEE ALSO:

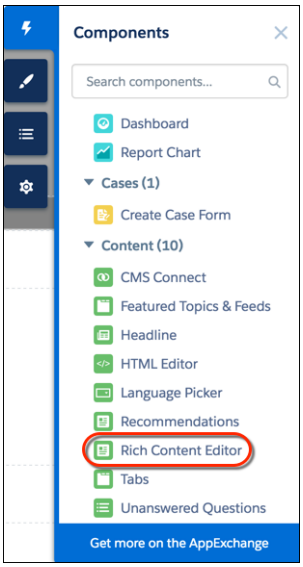
Which Components Can I Use with Each Template?

Rich Content Editor

The Rich Content Editor component lets you add formatted custom text to your community pages, along with images and videos.

If you prefer to create and edit your content in HTML, use the HTML Editor component.

1. In Community Builder, drag the Rich Content Editor component from the Components panel onto the page.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

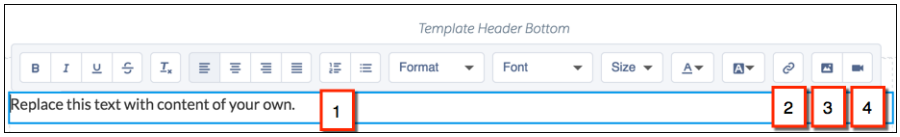
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

2. Add and format text (1), and add links (2), images (3), and YouTube or Vimeo videos (4) directly in the editor.

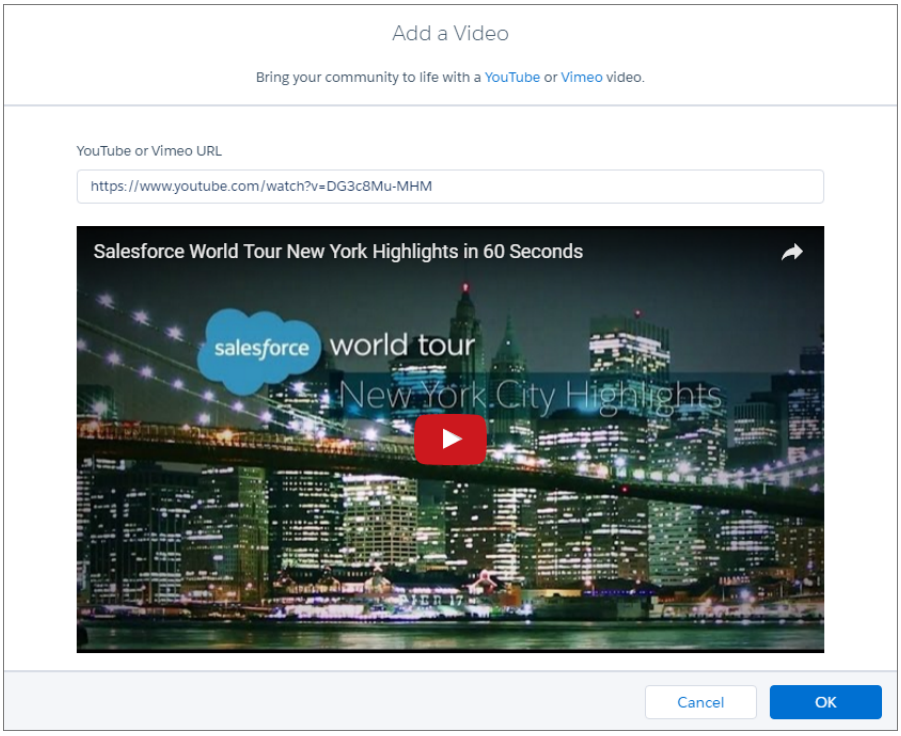


When you add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library.

Note: If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

Images and videos are supported only in Rich Content Editor components that were added after the Spring '16 release.

Example: Sample YouTube video in the Rich Content Editor component:



SEE ALSO:

Find and Create Asset Files in Community Builder

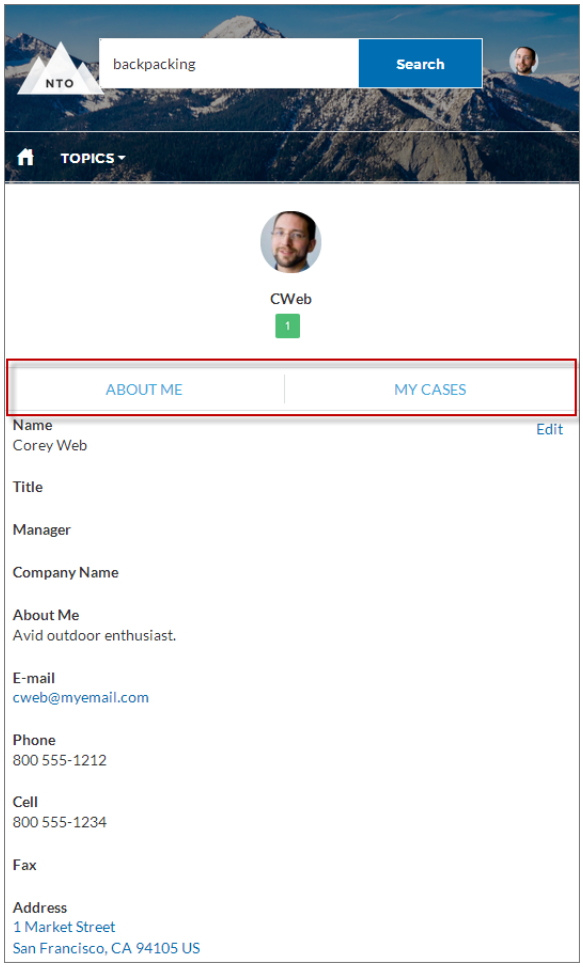
HTML Editor

Scroll To

Custom code on the Profile page in the Customer Service template lets users scroll to the selected component from a user's profile page. This saves a mobile user from having to scroll to a profile component that isn't visible on his or her device.

1. On the Profile page, right-click the area of custom code below the User Profile Header, and click `Edit`.
2. In the Edit Code page, you can change the labels that let mobile users navigate in their profile.

Example: Sample Scroll To component:



SEE ALSO:

Which Components Can I Use with Each Template?

Search

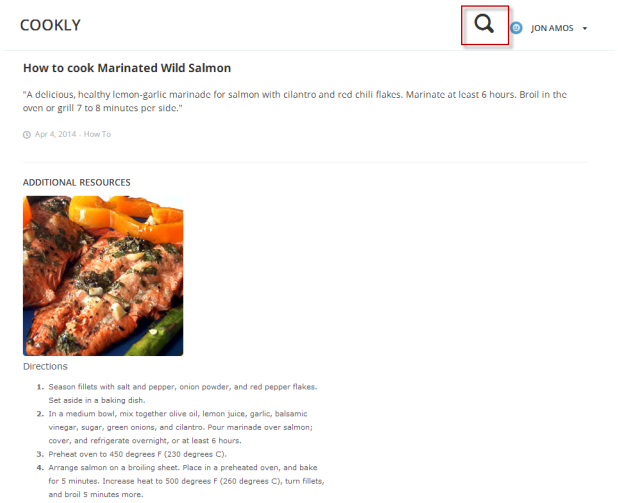
The Search component lets users search articles within the context of the page they're viewing.

When a user types in the search text box, the system returns suggested articles and search strings that match the characters typed in the search box.

1. Select the **Search** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Placeholder Text`	Enter the text that appears in the search bar. The default value is *`What would you like to know?`*
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Max Number of Auto Query Suggestions`	Select the number of search queries to return per match.
`Max Number of Article Title Match Results`	Select the number of articles to return per match.

Example: Sample Search component:



SEE ALSO:

Which Components Can I Use with Each Template?

Search & Post Publisher

The Search & Post Publisher component lets your users search for articles, discussions, and any object available to your community members and made searchable. It also lets users ask questions or contact support when they can't find the information they're looking for.

Autocomplete search results are based on whether the discussion, article title, or record contains the text entered by the user. The search accounts for partially matching terms and non-adjacent terms. For example, the results for "best backpack" could include a question titled "Which backpack is best for day hikes?" The results for "backpack" could include an article titled "Backpacking Tips." When a user performs a full search by clicking **Search**, the search engine also scans question descriptions and article text for matching terms.

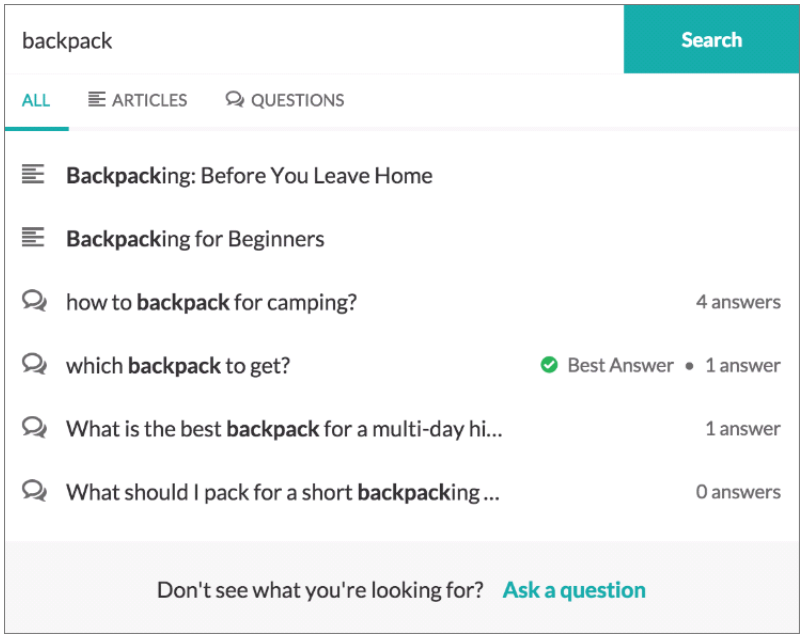
Customize the Search & Post Publisher to meet the needs of your community. Turn on autocomplete search to suggest search results to users, add a footer so that users can contact support if they can't find what they're looking for, and customize the post publisher for when users post questions to the community.

1. Select the **Search & Post Publisher** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Autocomplete Search	Click to expand the section with autocomplete search properties.
`Placeholder Text for Search Field`	Specify the text that appears in the search box. The default text is Search...
`Use autocomplete in searches`	Select this option to let users see suggested search results as they enter search terms.
`Show autocomplete results in one list`	Select this option to display suggested search results in one list as a community member enters search terms. Otherwise, the suggested results are shown in tabs. Note: This option must be enabled if you want autocomplete search results that can be sorted by relevance.
`Maximum Autocomplete Results`	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects is displayed in the combined results tab, but if there aren't enough of one type of result, additional results of the other type are displayed to reach the maximum. This functionality is available only in the Winter '16 and later versions of community templates.
`Show Discussions results before Articles`	By default, articles appear above questions in the combined search results, and the article results tab precedes the question results tab. Select this option to display questions before articles and to switch the tab order. This functionality is available only in the Winter '16 and later versions of community templates.
Autocomplete Results: Sort by Relevance	Click to expand the section that allows you to add searchable Salesforce objects to autocomplete results and have results sort by relevance.
`Objeccts in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your community's autocomplete results.
Autocomplete Results: Group by Object	Click to expand the section with that allows you to set grouping by object for autocomplete results.
`All Results Label`	Enter the name of the search results tab that displays results from all the searchable articles, discussions, and objects in the community. The default text is `All`. This functionality is available only in the Winter '16 and later versions of community templates.
`Article Results Label`	Enter the name of the search results tab that displays articles only. The default text is `Articles`. This functionality is available only in the Winter '16 and later versions of community templates.
`Discussion Results Label`	Enter the name of the search results tab that displays discussions only. The default text is Discussions. This functionality is available only in the Winter '16 and later versions of community templates.

Property	Details
Ask Community	Click to expand the section with properties regarding asking the community.
`Show footer during search`	Select this option to display the footer giving members an option to ask the community a question.
`Post to Ask the Community`	Enter the text that invites users to post a question to the community or to customer support. The default text is: Don't see what you're looking for?.
`Create Your Question Prompt`	Enter the text that users click to ask a question. The default text is: Ask a question.
`Create Your Sign-In Prompt`	Enter the text that directs users to a login page before they ask a question. The default text is: Sign in to ask a question.
Post to Publisher	Click to expand the section with posting properties.
`Discussion Publisher Title`	Enter the title of the modal window that members use to post questions.
`Select Navigational Topic Destination`	Enter the text that lets users pick a navigational topic for their question. The default text is: Post to a navigational topic.
`Post To Topic`	Enter the text that appears before the navigational topic name that the user chooses. For example, if a user posts a question to Coffee, the onscreen text says Post to Coffee.
`Topic Required Label`	Enter the text that shows that selecting a topic is required.
`Allow file attachments`	Select this option to let users attach a file to a question.
Contact Support	Click to expand the section with properties regarding contacting support.
`Let members contact support`	Select this option to let users contact customer support to create a case.
`Create Support Case Label`	Enter the text to display for the option to create a case. The default text is Contact Support.
`Create Private Support Case Label`	Enter the text to display for the option to contact support in a private message. The default text is Private.
`Case Action Name`	Enter the name of the action that creates new cases. Use the action layout editor to specify which fields to include in the layout. You also need to include this action in the Web-to-Case settings. For more information on quick actions and Web-to-Case, see the Salesforce Help.

Example: Sample Search Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

Search Results

The Search Results component lets users view tabbed lists of articles and discussions. The articles and discussions are returned when a user selects a topic or types a string in the Search Publisher.

Note: Before Spring '16, this component was named Results List.

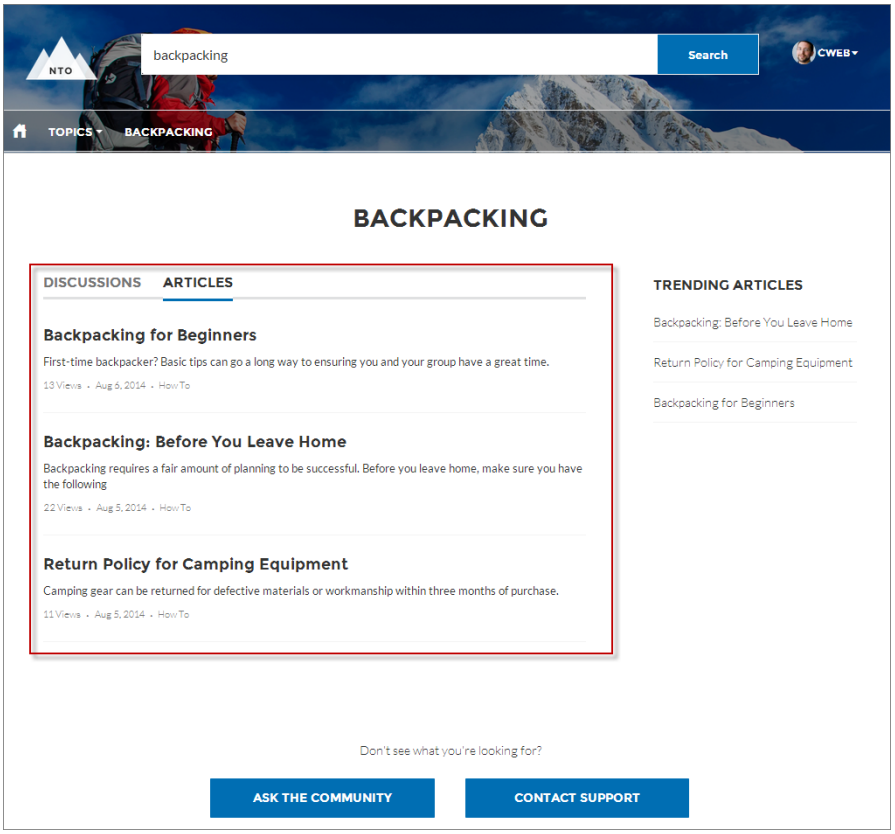
1. Select the **Search Results** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Articles Tab Label`	Enter the text that appears on the tab that users select to view the list of returned articles. The default text is `Articles`.
`Discussions Tab Label`	Enter the text that appears on the tab that users can select to view the list of returned discussions. The default text is `Discussions`.
`Topic ID`	The expression in the `Topic ID` field uses the topic ID that the user selects when filtering by topic.
`Search Term`	The expression returns results based on the text users enter when typing their search queries.
`Active Tab`	Specify which tab you want to appear as selected with its contents exposed, when the page loads. The expression retrieves the parameter from the query string in the URL for the page.

Property	Details
	Type *articles* to display the article search results first or *discussions* to display the contents of the discussion search results first.
Number of Articles	Enter the maximum number of articles to show in the component.
Show Article Tab	Select this checkbox if you have Salesforce Knowledge enabled and want community members to search for and view articles.
Default Sort Order for Feed	The default sort order for the feed on the Discussions tab. Presents community members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.
Show a streamlined question feed on the Discussions tab	Select to show a compact feed on page 278 on a search results Discussions tab.

Important: For articles to show up in the Search Results component, they must be associated with a topic. Moreover, the community language and article language must match.

Example: Sample Search Results component:



SEE ALSO:

Which Components Can I Use with Each Template?

Set Case Status Button

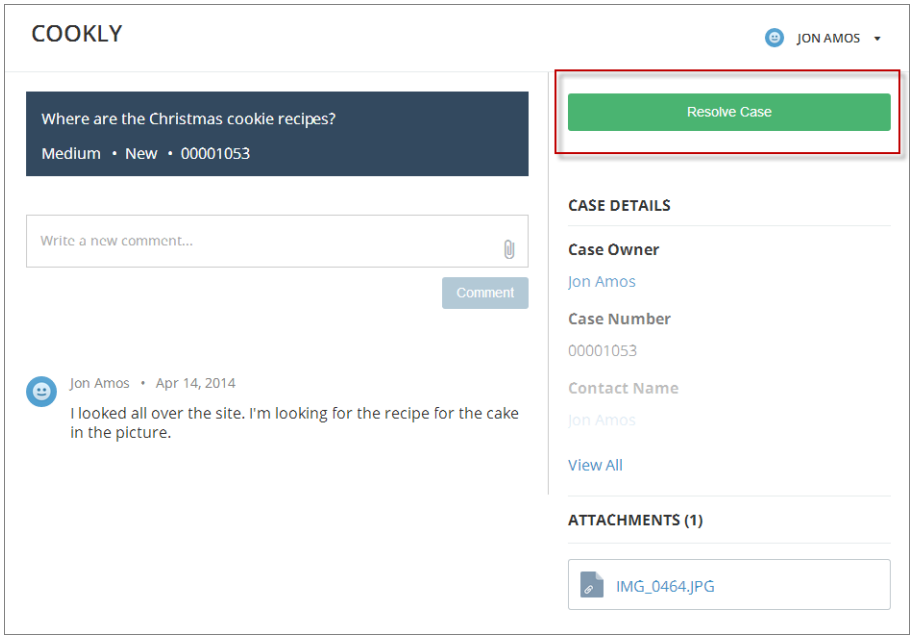
The Set Case Status Button component lets users click a button to mark a case as resolved and close it.

Note: Before Spring '16, this component was named Case Status Button.

1. Select the **Set Case Status Button** component in the page you're configuring.
2. Configure properties for the component in the property editor:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
`Active Status Label`	Enter the text that appears on the button when the case is still open. For example, the button can be labeled **Close Case** or **Resolve Case**.
`Inactive Status Label`	Enter the text that appears on the button when the case is closed. For example, the button can be labeled **Re-Open Case**.

Example: Sample Set Case Status Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

Embedded Appointment Management

The embedded Appointment Management component allows users to schedule, modify, or cancel an appointment.

Important:

- Make sure to set up Field Service, build the flows you need, and install the Field Service Lightning managed package before adding this component to your community pages.
- Remove the Embedded Chat component from the community pages where you want to use this component. You can use one embedded component per page.

1. Select the embedded Appointment Management component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Embedded Service Deployment	Select an embedded Appointment Management deployment.
Logged In Button Label	Enter a label for the appointment manager when users are logged in. The default label is `Book Appointment`.
Logged Out Button Label	Enter a label for the appointment manager when users aren't logged in. The default label is `Log In and Book Appointment`.

Property	Details
Button Loading Message	Enter a label for the appointment manager when the flow is loading. The default label is `Loading...`.

Embedded Service

The Embedded Service component allows users to request a chat with a support agent.

Important:

- Make sure to set up Chat and Embedded Service before adding this component to your community pages. For help, see "Set Up Embedded Service for Your Website" in the Salesforce help.
- Remove existing Chat buttons from the community pages where you want to use the Embedded Service component. If you don't remove Chat buttons, the component doesn't work.

1. Select the Embedded Service component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Chat Deployment	Select an Embedded Chat deployment.
Display Chat Button	Display the chat button to users.
Fill in Pre-Chat Fields	When selected, the name and email fields on your pre-chat form are pre-populated for logged-in users.
Button Label	Enter a label for the chat button. The user sees this before they start a chat. The default label is `Chat with an Expert`.
Offline Button Label	Enter a label for the chat button when there are no support agents available to chat. The default label is `Agent Offline`.
Offline Support Button Label	Enter a label for the chat button when there are no support agents available to chat, and your Embedded Service deployment has offline support enabled. Offline support lets you present a web-to-case form inside the chat window when agents are offline. The default label is `Contact Us`.
Chat Waiting Message	Enter a label for the chat button when a chat has been requested and is waiting for an agent. The default label is `Loading....`.
Chat Waiting Background Image URL	Enter a URL for an image to display in the chat window when a chat is waiting for an agent.
Agent Avatar Image URL	Enter a URL for an agent avatar image to display in the chat window. This avatar applies to all agents taking chats from this button. We recommend using an image no larger than 40x40 pixels

Property	Details
Pre-Chat Background Image URL	Enter a URL for a banner image to display in the chat window while the user fills out the pre-chat form.
Company Logo URL	Enter a URL for a logo to display in the minimized chat window when a chat is waiting for an agent. We recommend using an image no larger than 25x25 pixels.
Routing Order	Enter IDs for `userId`, `buttonId`, or `userId_buttonId`, separated by commas. This field sets a routing order to agents and chat buttons for the Embedded Service Deployment that overrides the assigned Chat button..
External Scripts	Enter the static resource name for the externals script(s) used to create custom chat events. Use the name of the static resource object, like *`CustomEvent`*, instead of the name of the file itself.
External Styles	Enter the static resource name for the external style(s) used to create custom chat events. Use the name of the static resource object, like *`CustomStyles`*, instead of the name of the file itself.

Stream Detail

The Stream Detail component is available to repair the Stream Detail page in the event its Stream Detail component is mistakenly removed.

1. In the Community Builder, select the **Stream Detail** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Stream ID`	Stream ID has a default variable value that gets the ID of whatever stream was selected on the Stream List page. We recommend that you leave this value at its default, `{!recordId}`. Changing this value fixes the display to one stream that only one community member has access to. That is, the member who created the stream with the fixed ID you enter here.

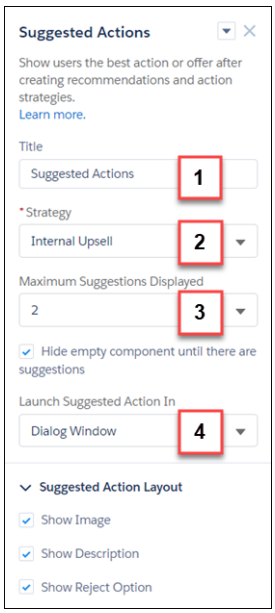
Stream List

The Stream List component is available to repair the Stream List page in the event its Stream List component is mistakenly removed. The Stream List component has no properties.

Suggested Actions

Suggested Actions brings the power of Einstein Next Best Action into Communities. Choose strategies that apply your org's business rules to display suggested offers and actions.

1. Create a recommendation strategy in the Strategy Builder.
2. Drag the Suggested Actions component onto your community page.
3. In the property editor, enter the title that you want customers to see (1) and select the strategy you want to display (2). Enter the maximum number of suggestions to display (3) and choose where the suggested actions open (4).



USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

To run a suggested action in a Lightning community
- Run Flows

  OR

  Flow User field enabled on the user detail page

Title
Displays this title for the component on the Community page. The default title is Next Best Action.

Strategy
Displays all available strategies created in Strategy Builder.

Maximum Suggestions Displayed
Allows up to four suggestions to display when there are multiple suggested actions available.

Hide Empty Component
Hides the component when there are no suggested actions initially available. If there are actions available when the app opens, the component continues to display, even if the actions run out.

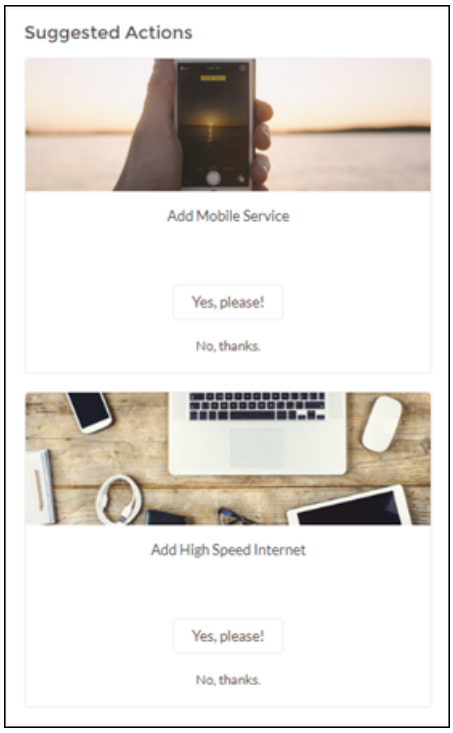
Launch Suggested Actions In
Specifies whether your suggestions open in a display window, a new browser window, or on a community flow page.

Show Image
Shows images associated with each suggested action. If the recommendation doesn't have an image, a placeholder displays.

Show Description
Displays the description defined on the Recommendation record.

Show Reject Option
Displays the reject option associated with suggested actions.

Example: Here's how a strategy looks when it displays in a community.



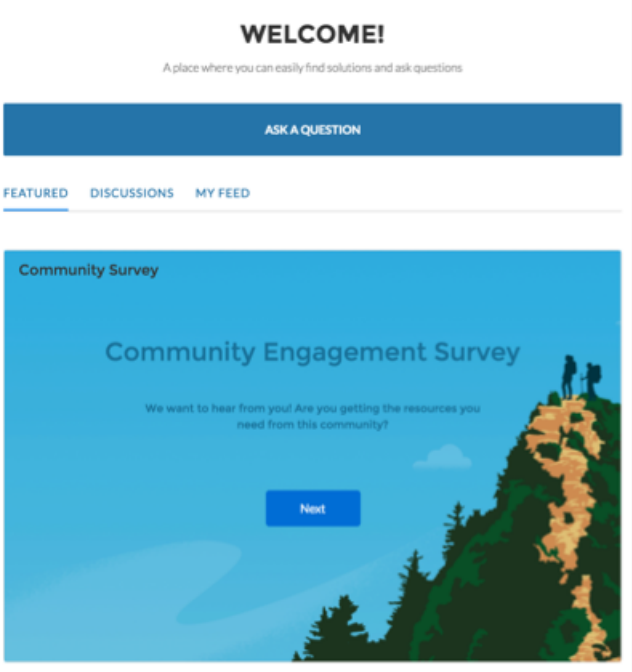
Survey

Use the Survey component to embed active surveys into your community's pages.

1. In the page that you're configuring, select the **Survey** component.
2. In the property editor, configure properties for the component:

Property	Details
Survey Name	Select an active survey.

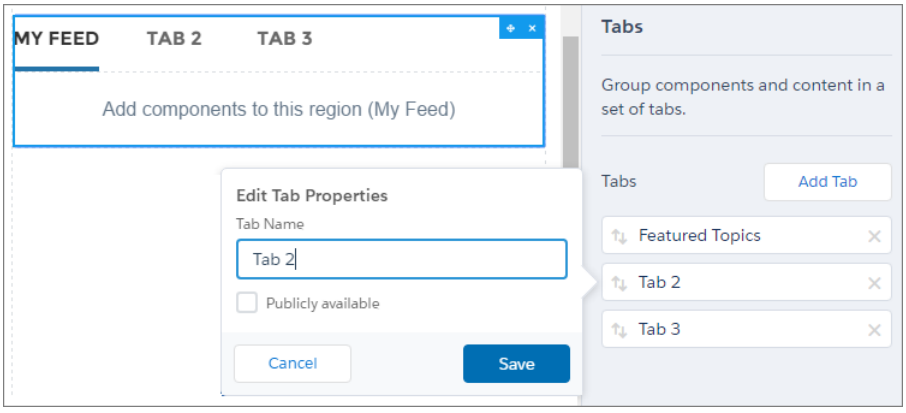
Example: Sample Survey component:



Tabs

Use the Tabs component in the Customer Service to group other components in a set of customizable tabs for structure. Add as many tabs as you need and whatever components you want. You can rename and reorder the tabs, and choose whether to show or hide individual tabs to guest users in the community.

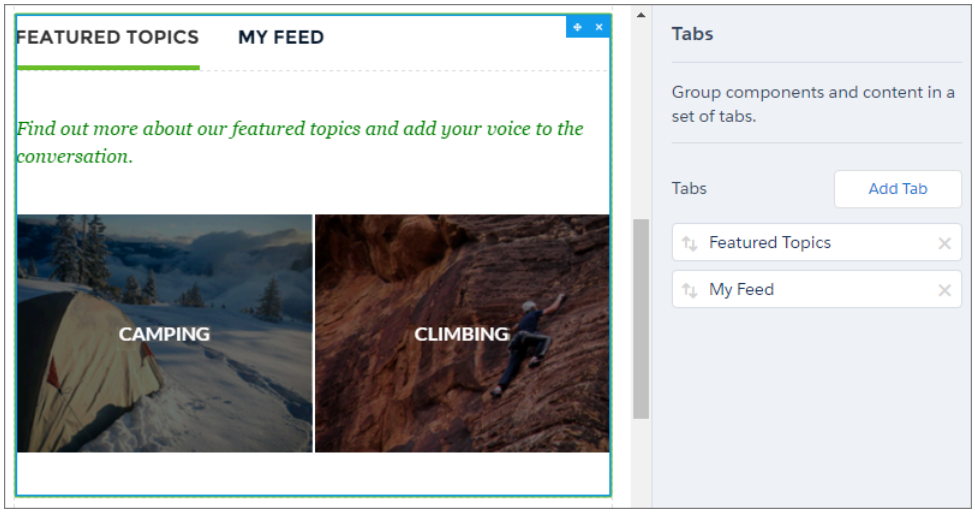
1. Add the **Tabs** component to a page or select it on the page you're configuring.
2. In the property editor, configure the component.
   - To add another tab, click **Add Tab**.
   - To rename a tab or set its public availability, select the tab. To make that tab available to guest users in the community, select **Publicly available**. If no tabs are publicly available, the entire Tabs component is hidden from guest users.
   - To reorder a tab, drag the tile to the correct position.



3. Add the components you need to each tab.

   Note: You can't add a Tabs component to another Tabs component.

Example: Sample Tabs component with two renamed tabs—Featured Topics and My Feed:



SEE ALSO:

Which Components Can I Use with Each Template?

Tile Menu (Beta)

Use the Tile Menu component in Community Builder to add an intuitive and visually stunning navigation experience in Customer Account Portals.

Customers using the Tile Menu can use images to access an external site, community page, record, or global action. For example, clicking an image takes a customer to a page to log a case or file a claim. You can set up a maximum of eight image-link combinations per Tile Menu component.

Note: This release contains a beta version of the tile menu that is production quality but has known limitations. To provide feedback and suggestions, go to IdeaExchange.

Note: The Tile Menu component isn't currently available for use in packageable Bolt Solutions.

When setting up the tile menu, consider the following:

To create or modify tile menu items:

1. Select the **Tile Menu** component in the page you're configuring.
2. In the property editor, click **Edit Tile Menu**.

   In the menu editor overlay, you can edit or delete existing menu items, or add new ones.
3. To add a menu item:
   a. Click **Add Link**.
   b. Enter the name you want to use in the tile menu for this item in **Text**.

c. Upload the image you want to associate to your link. When using the component in a full size column, we recommend JPG images that are 125 pixels high and up to 247 pixels wide. If you're using the component in any other column width, we recommend JPG images that are 125 pixels high and 336 pixels wide.

d. Select the type of item you're navigating to.

Options include:

- Community Page—Links to a page inside your community using a relative URL. For example, `/contactsupport`.
- External URL—Links to a URL outside of your community. For example, `http://www.salesforce.com`.
- Global Action—Adds a global action to your image.
- Salesforce Object—Available objects include accounts, cases, campaigns, contracts, contacts, dashboards, groups, leads, opportunities, orders, price books, products, quotes, reports, tasks, work orders, and any custom objects.

e. Complete the fields based on the type you selected.

- If you select Community Page, use the drop-down to select the community page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
- If you select External URL, enter the fully qualified URL. To keep navigation within your community, select the `Open link in the same tab` checkbox.
- If you select Global Action, select the action to associate with the image.
- If you select Salesforce Object, select the default list view to show.
- Select **Publicly available** if you want the tile menu item to show for guest users that aren't members of the community.

Note: Make the images in the tile menu viewable by community users, enable **Let guest users view asset files on public and login pages** in **Workspaces** > **Administration**. Then, give read access to Documents.

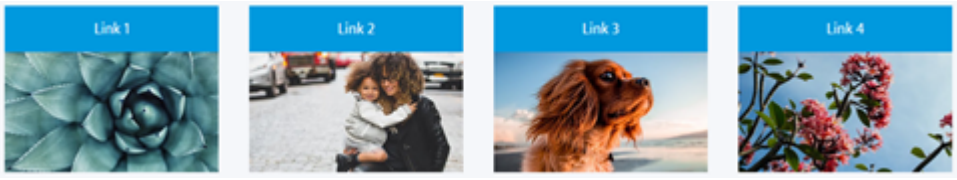
4. To move an item, click and drag the item to where you want it to appear in the menu.
5. To delete a menu item, hover over or click the item and click .
6. Save your changes.

If your community is already active, you see a Publish button. **When you click this button, your new tile menu changes are immediately visible to community members.**

Note: When using Translation Workbench to translate text in the Tile Menu, select **Navigation Menu Item** as your **Setup Component**.

7. Choose to show or hide the hover icon for your tile items.

Example: Example of a tile menu.



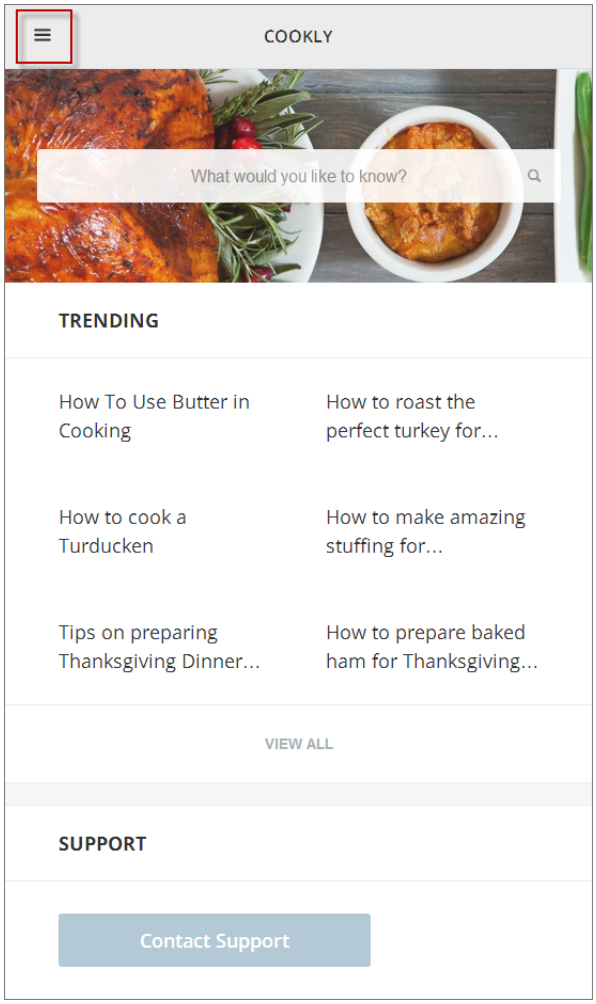
Toggle Button

The Toggle Button component lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn't appear in the desktop view.

You can find the **Toggle Button** component in the template header.

1. Select the **Toggle Button** component in the page you're configuring.
   There are no properties to set for this component.

Example: Sample Toggle Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

Top Article by Topic

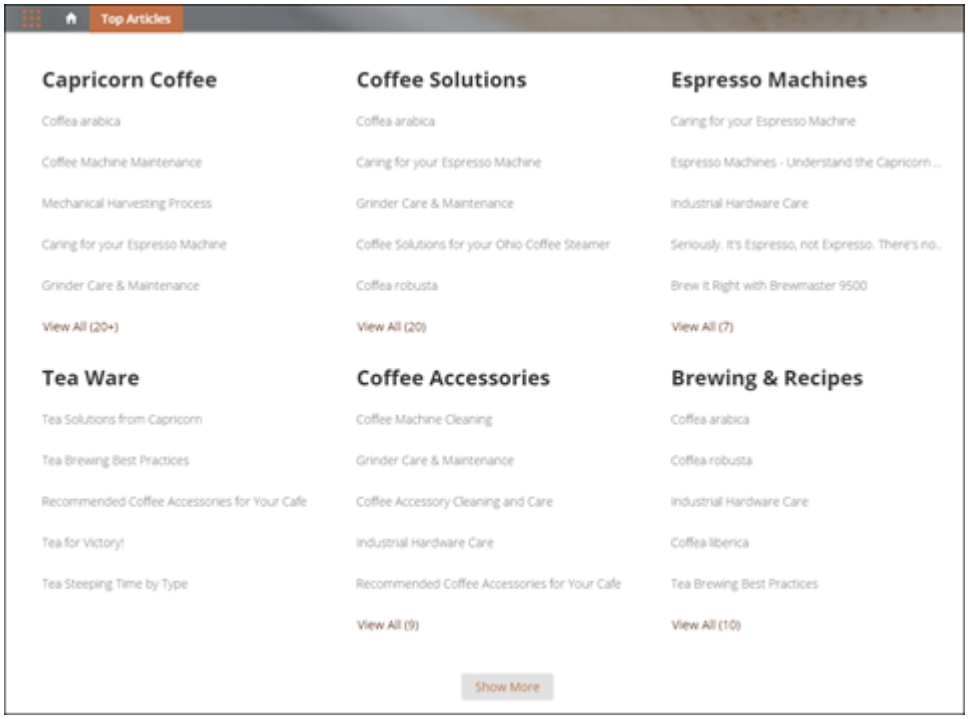
Give your customers more direction when they're browsing your knowledge articles. Using the Top Articles by Topic component, you can organize topics in one view. Articles populate under the topics, ranked by view count.

1. Select the **Top Articles by Topic** component.
2. In the property editor, configure the component.
   - To add another topic, click **Add**.
   - To set a topic's public availability, select the topic. To make that tab available to guest users in the community, select **Publicly available**.

- To reorder topics, drag the tile to the correct position.
- Indicate the number of articles to list under each topic (maximum 10).

Note: If you delete a topic from a community, but have it referenced in the Top Articles by Topic component, the topic name won't show. The articles, however, are listed under a blank topic name. To not see the article list, delete the topic name from the Top Articles by Topic component as well.

Example: Top Articles by Topic component in use:



Topic Catalog

The Topic Catalog component lets community members see a full listing of navigational parent and subtopics you have set up for the community in one convenient location.

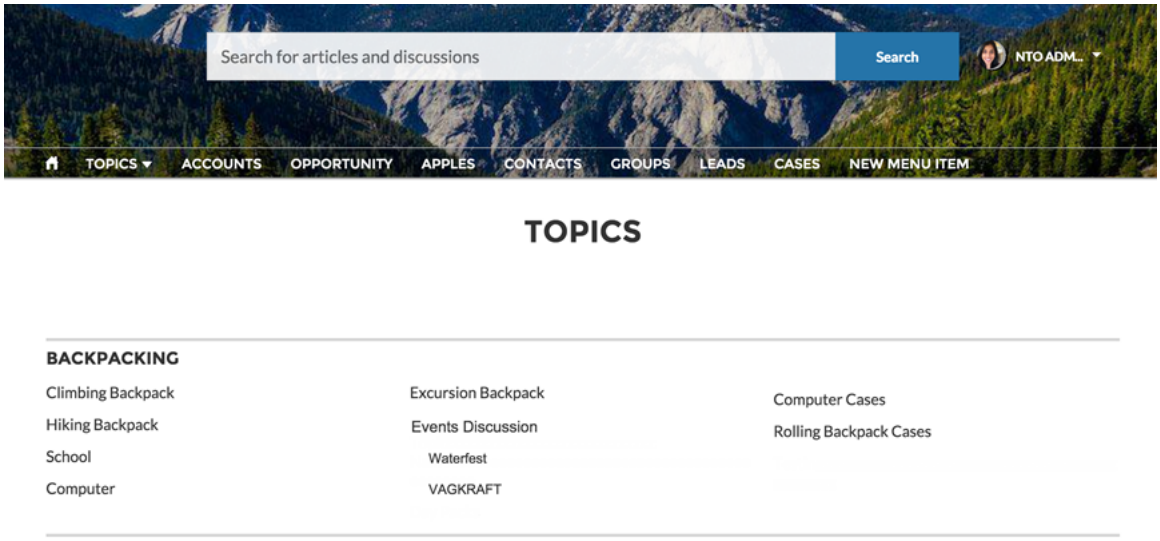
The following is the maximum number of navigational topics and subtopics you can have in a Customer Service community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

Note: The topic catalog shows only navigational topics and subtopics, and is only visible after you set them up.

1. Edit the Navigation Menu component in your community (typically, on the home page).
2. Select **Add the "More Topics..." link**.

Example: When community members can click `More Topics` link from the Topics list in the navigation menu, they see the topic catalog.



SEE ALSO:

Which Components Can I Use with Each Template?

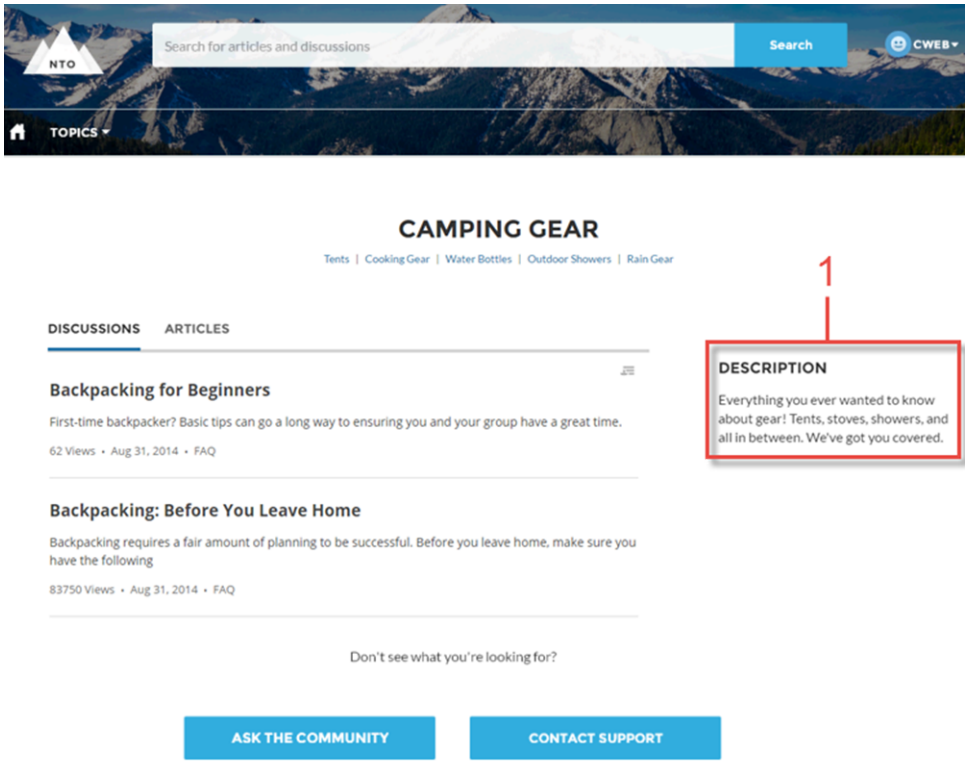
Topic Description

The Topic Description component is used on the Topic Detail page in the Customer Service community template. It shows the topic's description as entered in Community Management.

1. Select the **Topic Description** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Topic ID`	The system supplies this value, and populates the component with the description tied to the topic shown on the topic detail page.
`Title`	Enter text for the title. The default text is `Description`.

Example: Sample Topic Description component.



SEE ALSO:

Which Components Can I Use with Each Template?

Topic Metrics

The Topic Metrics component lets users see how often community members use a topic.

You can show the number of posts, articles, and followers that a topic has, and how many people have used the topic in the last 60 days. Use the Topic Metrics component on the Topic Detail page.

1. Select the **Topic Metrics** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Show Posts`	Enable this setting to show the number of posts tagged with the topic. For navigational topics, the number of posts includes posts tagged with the topic and posts tagged with subtopics.
`Show Articles`	Enable this setting to show the number of articles tagged with the topic.
`Show Followers`	Enable this setting to show the number of people following the topic.

Property	Details
`Show how many people used the topic in the last 60 days.`	Enable this setting to show how many community members have used the topic in the past 60 days.
`Topic ID`	This field populates dynamically with the topic ID.

Topics

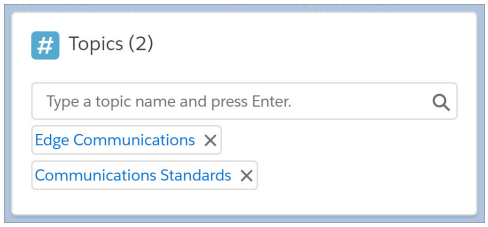
The Topics component allows your community members to add topics to records to organize them by theme.

Add the topics component to record detail pages for objects that have topics enabled.

1. Select the **Topics** component.
2. In the property editor, configure properties for the component:

Property	Details
`Record ID`	The record ID. Typically, this field populates when the page loads.
`Title`	Enter a title for the component. The default text is *`Topics`*.
`Placeholder Text`	Enter placeholder text that appears in the topic editor to encourage members to enter topic names. The default text is *`Type a topic name and press Enter.`*
`Number of Topics Shown`	Enter the number of topics to show before the Show More link appears. The default number is *`10`*.

Example: Sample Topics component



Totals

The Totals component displays count summaries related to the community group, such as number of posts, members, and likes.

The Totals component displays as Summary on a page. It is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Totals** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:

Trending Articles

The Trending Articles component displays the most popular articles in your community. You can display them sorted by category or just display the top articles regardless of category.

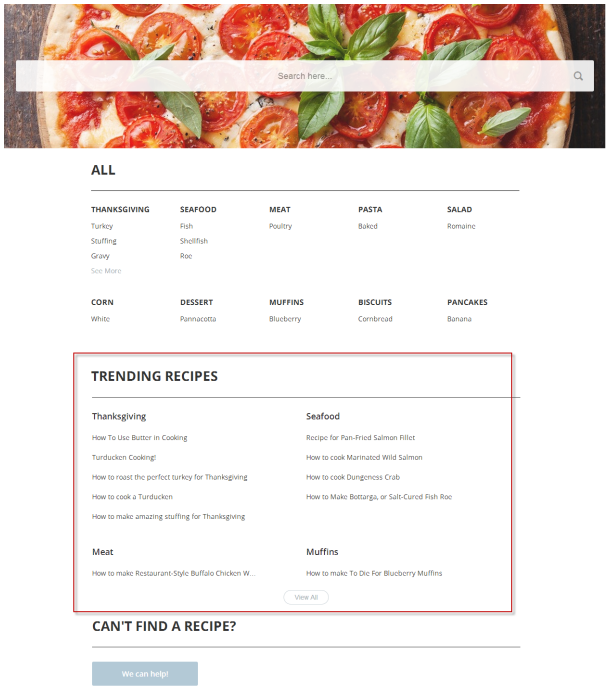
An article's popularity is based on the number of recent views. You can specify two different display options for this component:

- A two-column list of the top trending articles for the community.
- Two or more columns of trending articles sorted by data category. When a data category doesn't have any articles that are trending, it doesn't appear in the list.

1. Select the **Trending Articles** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Number of Articles`	Enter the maximum number of articles to display in the component. If you are using the two-column view with images, this will be the total number of articles that appear in the component. If you choose to display articles by data category, this will be the number of articles per child category.
`Number of Categories`	Enter the maximum number of categories to display in the component. This value controls whether the trending articles are organized by category or not: • To view a list of trending articles that isn't organized by categories, type *0* in the field. • To view trending articles organized by data category, specify the number of categories to display. Note: If you specify a parent category that has no children, the component will display the trending articles without categories even if you specify a number in this field.
`Title`	Enter a title for the component. The default text is *Trending*.

Example: Sample Trending Articles component:



SEE ALSO:

Which Components Can I Use with Each Template?

Trending Articles by Topic

The Trending Articles by Topic component displays the most popular articles in your community organized by topic.

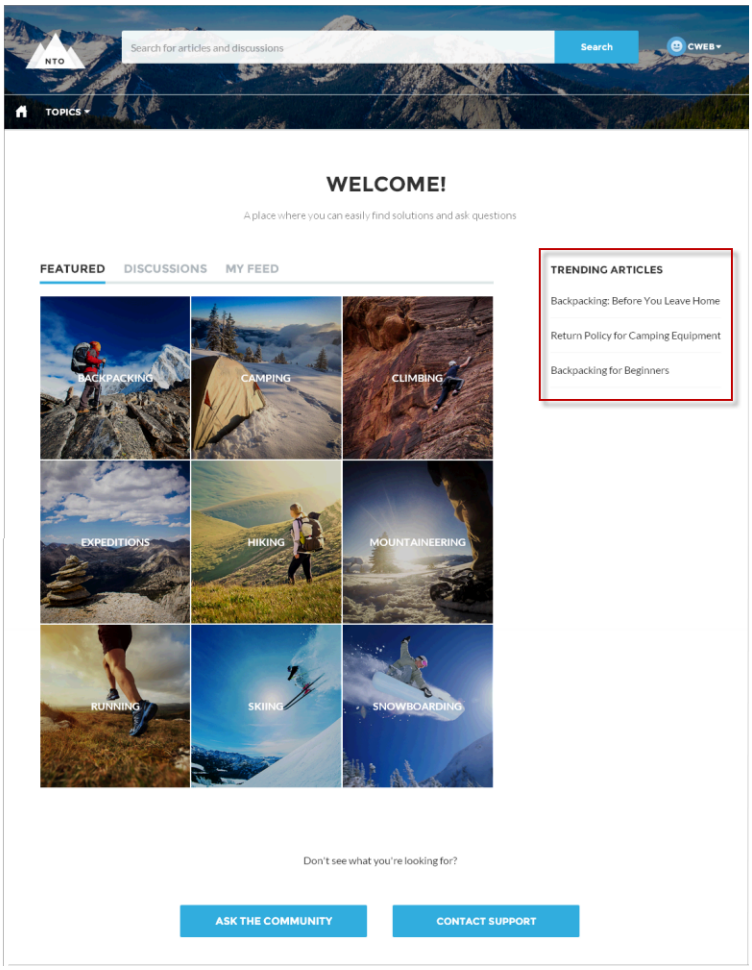
Note: Before Spring '16, this component was named Topic Trending Articles.

The topicID attribute is optional. If it's not set, then trending articles scoped by all managed topics appear in the component. An article's popularity is based on the number of recent views.

1. Select the **Trending Articles by Topic** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter the text that is the title for the component. The default text is *`Trending Articles`*.
`Number of Articles`	Enter the maximum number of trending articles to display.
`Topic ID`	The expression in the field uses the ID from the topic that the user selects to display the list of articles. To display articles from all managed topics, leave this field blank.

Example: Sample Trending Articles by Topic component:



SEE ALSO:

Which Components Can I Use with Each Template?

Trending Topics

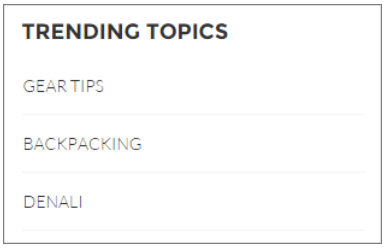
The Trending Topics component displays the popular topics in your community.

In the Page Editor, you can configure the Trending Topics component on the Home page.

1. Select the **Trending Topics** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the list of trending topics. The default text is `Trending Topics`.
`Number of Topics`	Enter the number of trending topics to display. You can display a maximum of five topics at a time.

Example: Sample Trending Topics component:



SEE ALSO:

Which Components Can I Use with Each Template?

Unanswered Questions

The Unanswered Questions component lets users see the most viewed unanswered questions in a community. The component shows the top unanswered questions based on the view count across the community. As questions are answered, they are removed from view.

1. Select the **Unanswered Questions** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	The title of the component. The default text is *`Do you have the answer?`*.
`Number of Questions`	Enter the number of questions to show on the list. The default is 5.
`Show views`	Show the number of times the question has been viewed by users.

User Profile

The User Profile component shows detailed information about a user. Details include contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers.

The User Profile component uses a two-column layout by default. Profile details and the profile image are always shown, but you choose if you want to show related lists, Chatter statistics, and Knows About. You can also customize labels.

The layout of the component makes it ideal for viewing your community on a mobile device. When viewed on a mobile device or tablet, the component uses a single-column layout with four tabs: Feed, Cases, Details, and Related. The Cases tab is visible only when users view their own profile. You can edit all tab labels.

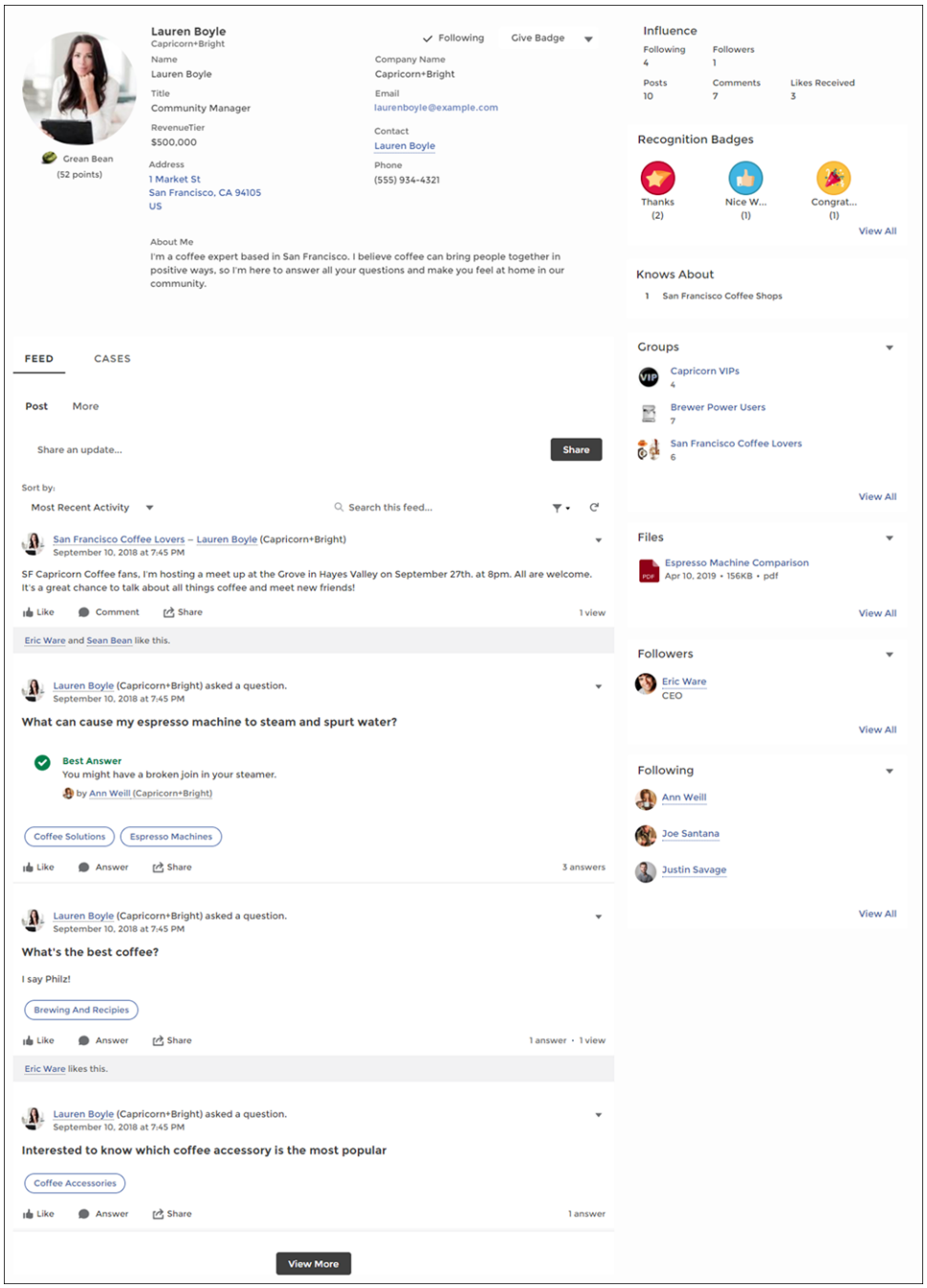
If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

If you prefer, you can create a custom layout with more granular control over the placement of user profile content. Create a custom community page, and use the profile components to build your own version of a profile. Profile components include the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knows About, and User Profile Related List components.

1. Select the **User Profile** component in the page you're configuring.
2. To view the properties component, select the Properties pane:

Property	Details
User ID	The system supplies this value so that authenticated users can view their own information. Don't update this field.
Show All Updates as the Default Feeds Filter	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.
Show Influence	Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
Influence Label	Enter a title for the Influence list. The default text is Influence.
Show Knows About	Determines if the Knows About list is shown.
Knows About Label	Enter a title for the Knows About list. The default text is Knows About.
Maximum Topics in Knows About Displayed (up to 10)	Enter the maximum number of topics listed for each user in the Knows About list, up to a limit of 10.
Show Recognition Badges	Determines if the Recognition Badges card is shown.
Recognition Badges Label	Enter a title for the Recognition Badges card. The default text is Recognition Badges.
Button Text	Enter the text you want to display on the button for awarding badges to other users. The default text is Give.
Show Related Lists	Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.
Feed Tab Label	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *Feed*.
Cases Tab Label	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *Cases*.
Cases Tab Header Label	Enter the text for the label that appears at the top of the list of cases. The default for this field is My Cases.
Case Filter Name or ID	Enter the name of the list view that displays cases.
Create Case Label	Enter the text you'd like to display on the button that users can click to create a case. The default text is Create Case.
Record Details Tab Label (Mobile only)	Determines if a record details tab appears. Record details include profile details, Knows About, and Influence. The default label is Details. Available only when a community is viewed on a mobile device.
Related Records Tab Label (Mobile only)	Determines if a related records tab appears, such as Groups, Files, Followers, and Following. The default label is Related. Available only when a community is viewed on a mobile device.

Example: Sample User Profile component



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Detail

The User Profile Detail component shows details about a user including contact information, profile photo, Chatter statistics, and topics the user is knowledgeable about. On other users' profiles, it also shows a Follow button.

Note: Before Spring '16, this component was named User Profile Body.

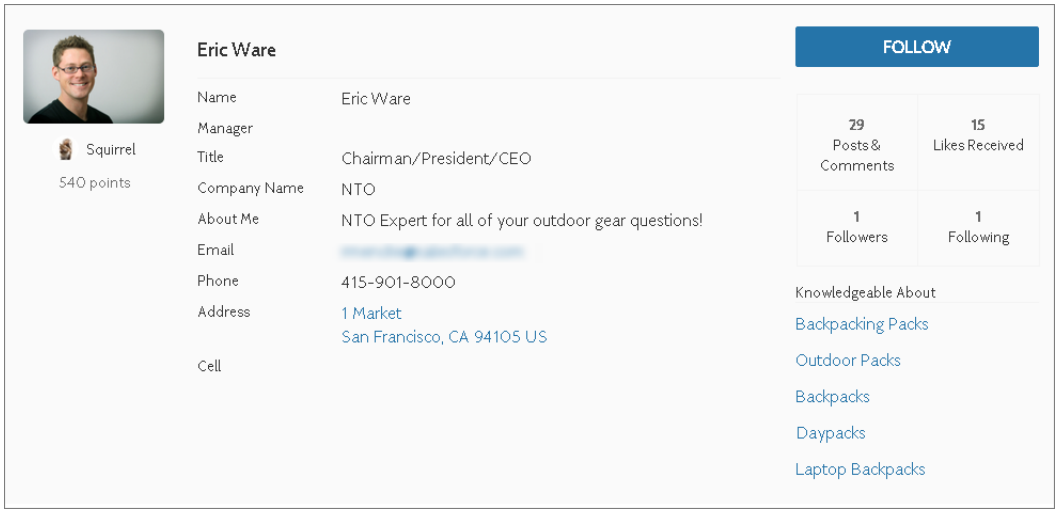
Chatter statistics for the community include number of posts and comments, likes received, followers, and people the user is following. Knowledgeable About shows top topics that people know about, so the community can quickly see areas of expertise. Topic knowledge is calculated based on factors such as best answers, mentions, or likes on questions and posts.

If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

1. Select the **User Profile Detail** component in the page you're configuring.
2. To view properties for the component, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show Knowledgeable About`	Determines if the Knowledgeable About list is shown.
`Title`	Enter a title for the component. The default text is `Knowledgeable About`.
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Example: Sample User Profile Detail component:



By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

Add Actions to Your User Profile

There are five available actions that can be added to a User Profile component in your community. These actions include: Freeze, Follow, Edit, Message, and Give Badge.

Note: Only the Follow action is turned on by default.

To modify your user profile actions in Lightning Experience,

1. Access the Salesforce Setup menu.
2. Go to **Object Manager** and select **Users**.
3. Click **User Page Layouts**.
4. On the **Mobile and Lightning Actions** tab, choose which buttons to display by dragging them into the **Salesforce Mobile and Lightning Experience Actions** section.
5. Save your layout.

Actions appear in a dropdown on the User Profile component and are displayed in the order you add them to the layout.

User Profile Image

The User Profile Image component displays the user's reputation level, reputation points, and profile photo.

Note: Before Spring '16, this component was named User Profile Header.

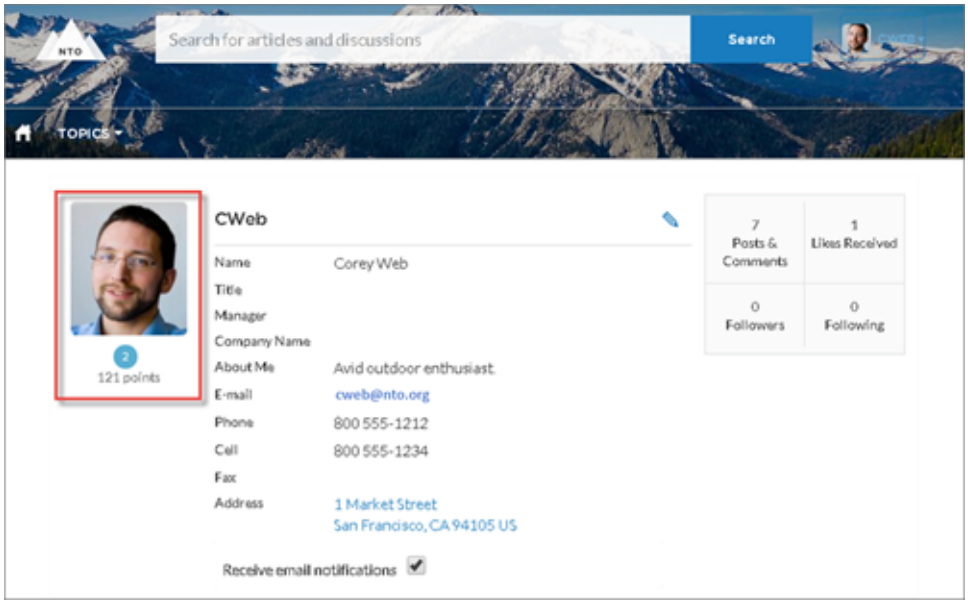
You can find the user profile image component in the Profile page. This component allows users to upload their profile photos in the community.

Note: The user's reputation level and points display only if reputation is enabled in the community.

1. Select the **User Profile Image** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Image component:



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Knows About

Allow community members to endorse and recognize experts using the widget directly on a member's profile page.

Once you have enabled Knowledgeable People, community members can endorse one another directly on their community's user profile page. The user profile page also displays all the topics the community member is knowledgeable about, and the number of endorsements received for each topic. Community members aren't able to endorse themselves on any topics.

Community members endorse one-another on existing topics, and they can use the component to enter new topics for endorsements. The component shows the number of endorsements members have for each topic they know about. Clicking the thumbs up buttons adds or removes endorsements, based on whether the member has been endorsed or not.

Note: Before Summer `16, this component was named Knowledgeable About. The component name for communities built before Summer `16 remains Knowledgeable About.

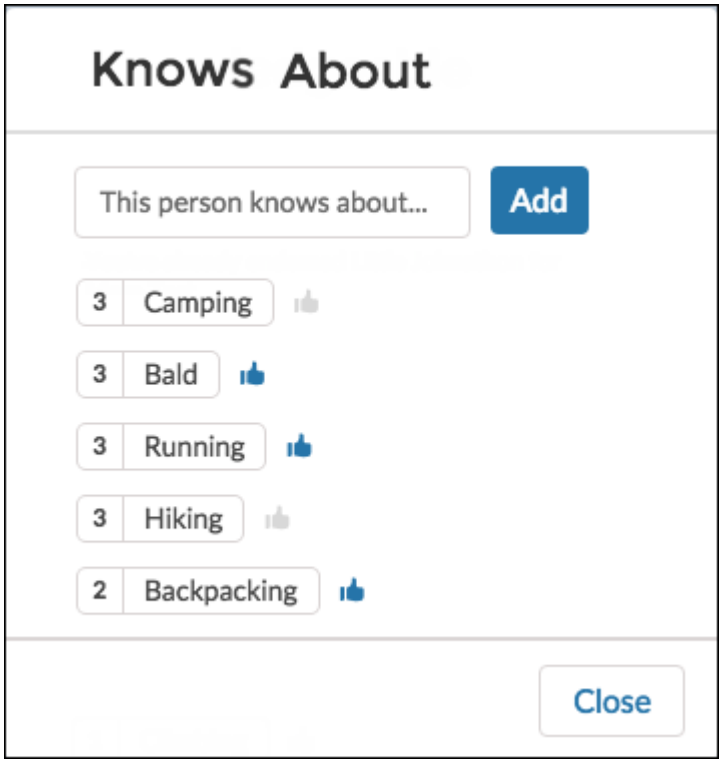
1. Do one of the following:
   - To display the Knows About list within the User Profile component, select that component.
   - To display the list elsewhere on the profile page, drag the User Profile Knows About component to the desired location.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The user profile ID. Typically, this field is automatically populated with the record ID when the page loads.
`Title`	Enter a title for the component. The default text is `Knows About`.

Property	Details
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Note: Community members can't opt out of being shown as knowledgeable about specific topics.

Example:



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Related List

The User Profile Related List component shows lists of a user's files, groups, followers, and who they're following.

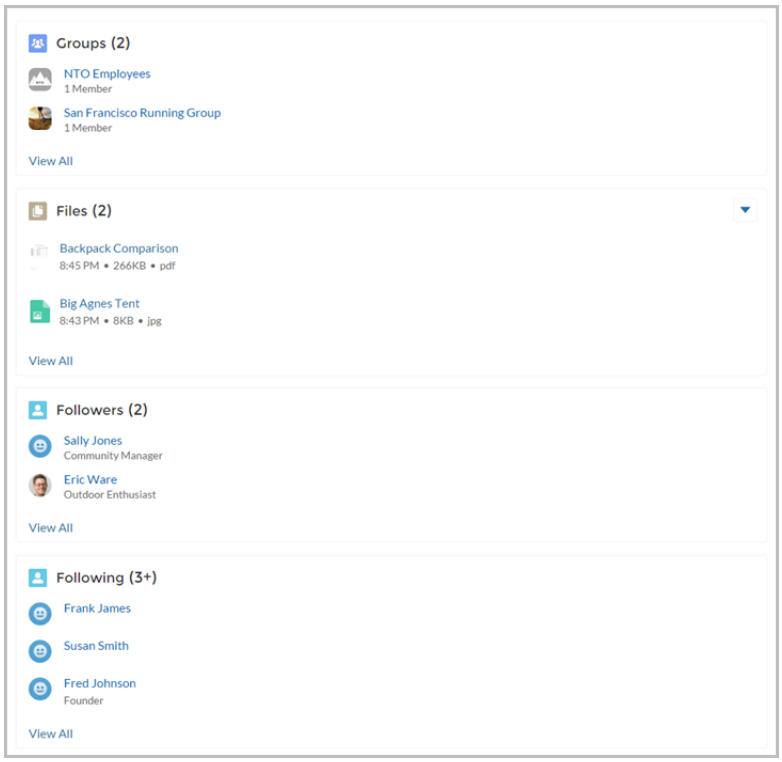
Add the User Profile Related List component to the User Profile page to show a user's related lists. Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click to upload a file.

You can customize which related lists are visible in your community by editing the User Profile page layout.

1. Select the **User Profile Related List** component.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The system supplies this value. Don't update this field.

Example: Sample User Profile Related List component



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Menu

The User Profile Menu component displays a user's name (or nickname) and profile picture. It also displays a dropdown from which users can navigate to their profile, open a case, access their locale and email notification settings, and log out. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Important: The User Profile Menu component replaces the Profile Header component in communities based on Winter '18 and later versions of Lightning community templates.

Users can't customize the profile photo functionality in the profile menu. Instead, they edit all profile information from the profile details page.

Note: If displaying a nickname is enabled in the community, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the community.

1. In the page you're configuring, select the **User Profile Menu** component.

2. In the property editor, configure properties for the component:

Property	Details
`Case Filter Name or ID`	The name or ID of the list view that displays the user's cases. This value is used throughout the community to display the user's list of cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select to include the option to contact an agent from the profile.
`Home Label`	Enter the text shown for the link to the community home page from the user navigation menu. The default is Home.
`Include My Messages`	Include a **My Messages** link in the profile menu, which shows the number of unread messages in the menu and opens the Messages page when clicked.
`My Profile Label`	Enter the text shown to indicate a user's profile. The default is My Profile.
`Contact Support Label`	Enter the text for the link to the page where the user can open a case. The default is Contact Support.
`Login Label`	Enter the text for the link to log in to the community. The default is Login.
`Logout Label`	Enter the text for the link to log out from the community. The default is Log Out.
`Community Management`	Enter the text for the link to the Community Management page. The default is *`Community Management`*. This link appears only for users with permissions to manage the community.
`Community Setup Label`	Enter the text for the link to the setup page for communities. The default is Community Setup. This link is shown to users with permissions to create or modify the community's administration settings.
`User Settings Label`	Enter the text for the link to access an authenticated user's personal settings for the community. The default is My Settings.
`Show User Settings in Menu`	Select this option to show user settings in the profile dropdown list.
`My Account Label`	Enter the text for the link that external users click to view their account record. The default is My Account. This feature is available in the Spring '16 version of the Customer Service template and later. Note: External community members who access the My Account link see their account details based on the configuration of the Record Detail page.

User Profile Stats

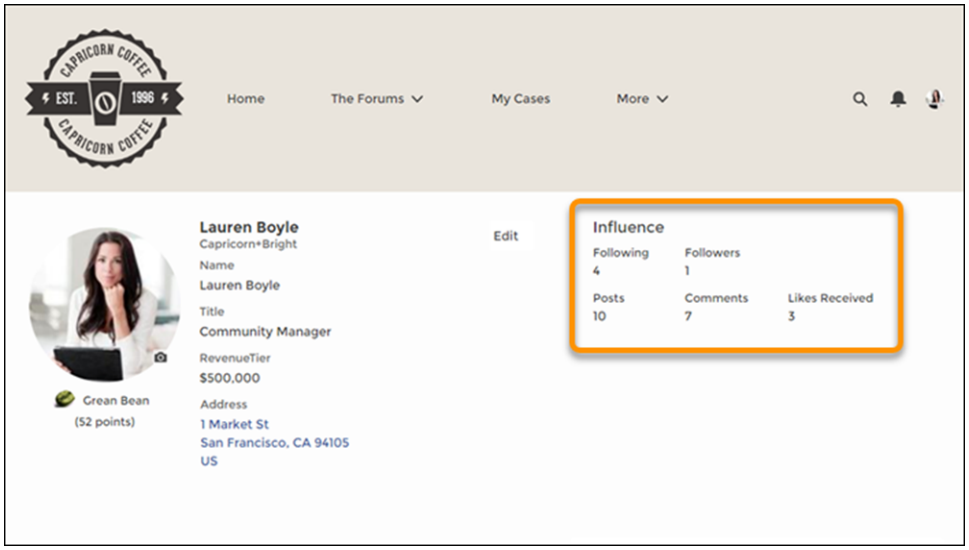
The User Profile Stats component displays many of the user's Chatter statistics for the community. Stats include the number of posts and comments made, likes received, followers, and people they're following.

The user statistics that appear in the User Profile Stats component are visible to all members of the community. This lets community members see how active other members are.

1. Select the **User Profile Stats** component on the page.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	Don't update this field. The system supplies this value.

Example: Sample User Profile Stats component:



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Summary

The User Profile Summary component displays the user's contact information, title, manager's name, and address. If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

Note: Before Spring '16, this component was named User Profile Detail.

By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

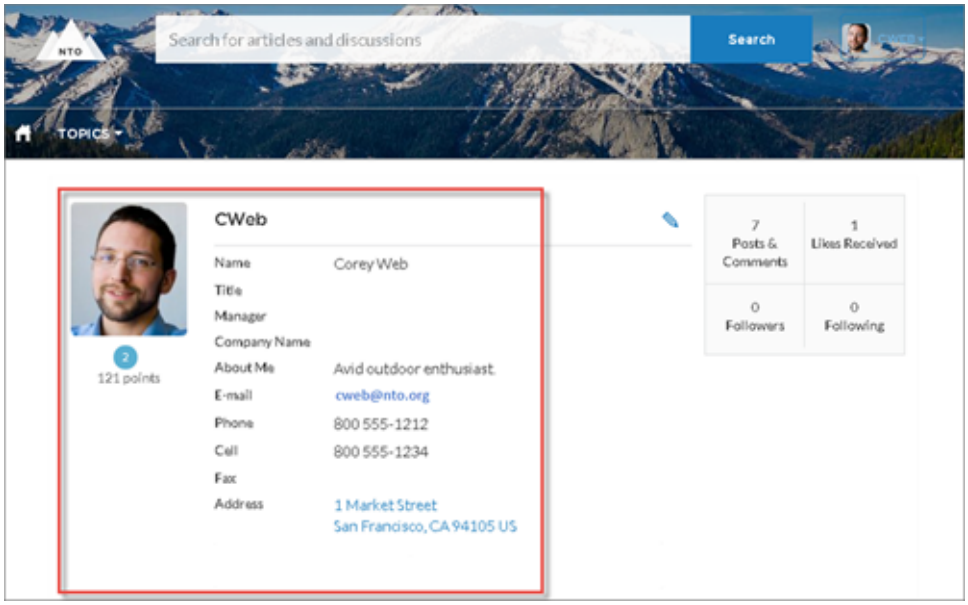
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the community. When viewing another user's profile, you can click their address to see a Google map of their location.

Note: When viewing a community on a mobile device, the Google map appears below the address.

1. Select the **User Profile Summary** component in the page you're configuring.
2. To view properties for the component, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary component:



SEE ALSO:

Which Components Can I Use with Each Template?

User Profile Summary & Image

The User Profile Summary & Image component displays a user's photo, contact information, reputation level, title, and manager's name. If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

Note: Before Spring '16, this component was named User Profile Header Detail.

By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

Users in Koa and Kokua communities access the user profile detail by viewing their own profile or clicking another member's name. In their own profile, users can click the pencil icon to edit their contact information. In another user's profile, users can click **Follow** to see the user's community activity directly in their feed. Clicking another user's address displays a Google map of their location.

Note: When viewing a community on a mobile device, the Google map appears below the address.

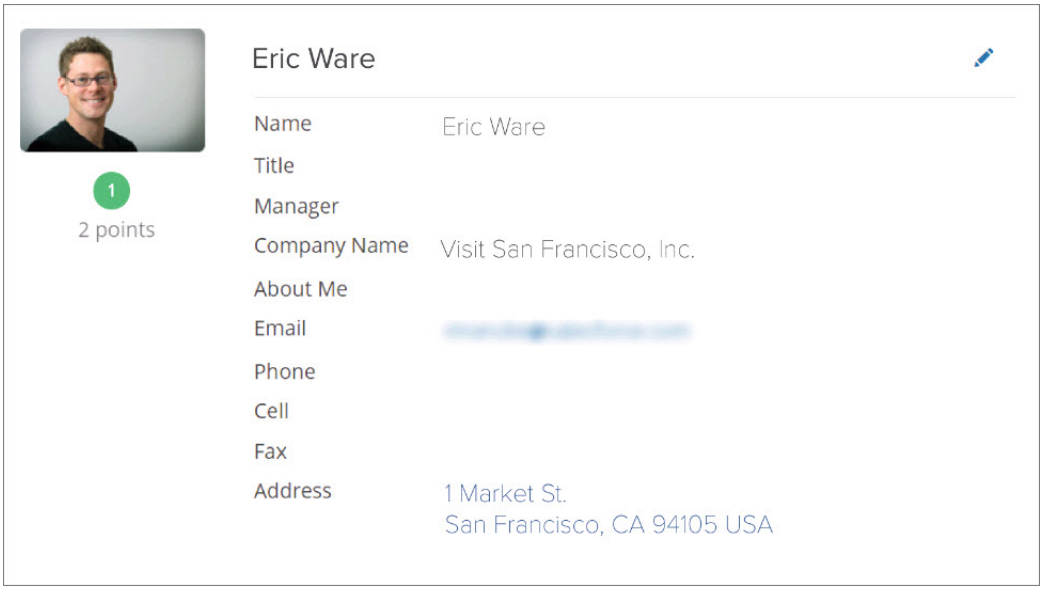
Important: To avoid issues, make sure that the User Profile Summary & Image component and the Case List component occupy different regions of the My Cases page. They occupy different regions by default, but it is a good practice to verify in your community.

To check, navigate to the My Cases page in Community Builder, go to the Page Editor, and click . If the two components are listed under one region—for example, Content—drag one to a different region.

1. Select the **User Profile Summary & Image** component in the page you're configuring.
2. To view properties for the component, select the Properties pane.

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary & Image component:



User Profile Tabs

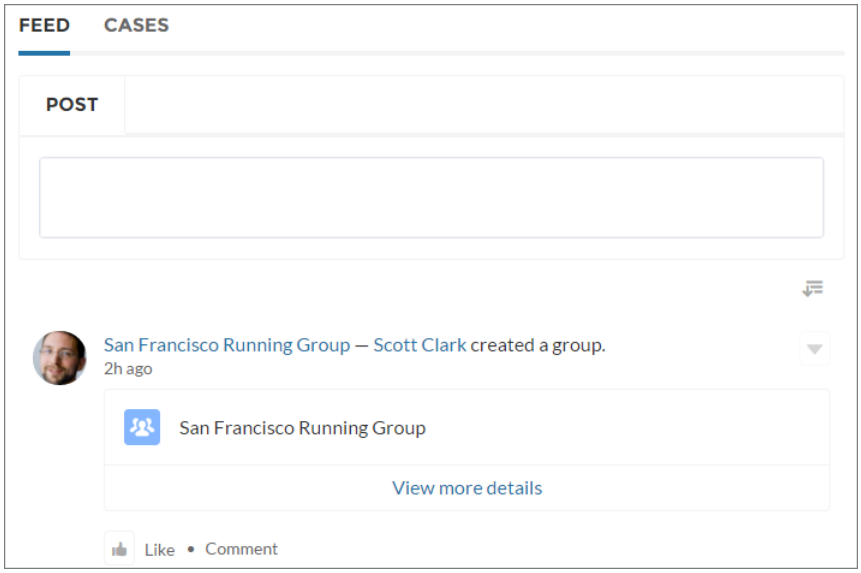
The User Profile Tabs component lets users see their feed and cases on their profile. They can also post to their feed directly from their profile. When viewing another user's profile, they see the user's activity but not their cases.

On desktops and tablets, users see a list view of up to 25 of their most recent cases. They can sort columns in the list and click the case number to view the details of that case. Navigation arrows let them click through the list of cases when there are multiple pages. On mobile devices, the view is optimized and users scroll through a list of cases and select a case to see its details.

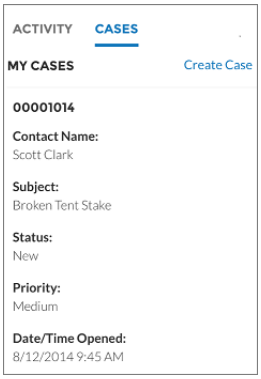
1. Select the **User Profile Tabs** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The system supplies this value. Don't update this field.
`Feed Tab Label`	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *`Feed`*.
`Cases Tab Label`	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *`Cases`*.
`Case Filter Name or ID`	Enter the name of the list view that displays cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Header Title`	Enter the text for the label that appears at the top of the list of cases. The default for this field is `My Cases`.
`Create Case Label`	Enter the text you'd like to display on the button that users can click to create a case. The default text is `Create Case`.
`Show All Updates as the Default Feeds Filter`	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.

Example: Sample User Profile Tabs component:



Case list viewed on a mobile device:



SEE ALSO:

Which Components Can I Use with Each Template?

User Settings

The User Settings component displays a user's username, email address, language, locale, time zone, profile visibility, and email notification settings. User settings are only available for authenticated users.

On the User Settings component, users can change their language, locale, and time zone so that the community is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the community. Users can also choose to receive email based on events in the community. If users don't want to receive email about events in the community, they can disable email notifications.

1. Select the **User Settings** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The system supplies this value. Don't update this field.
`Hide email notifications setting`	Prevents email notifications from appearing in a user's personal Chatter settings.
`Hide the Connected Sources tab`	Prevents the Connected Sources tab from appearing on the User Settings component.

Tip: For orgs where Single Sign-On (SSO) is enabled, you may also want to hide the Change Password link in a user's My Settings page.

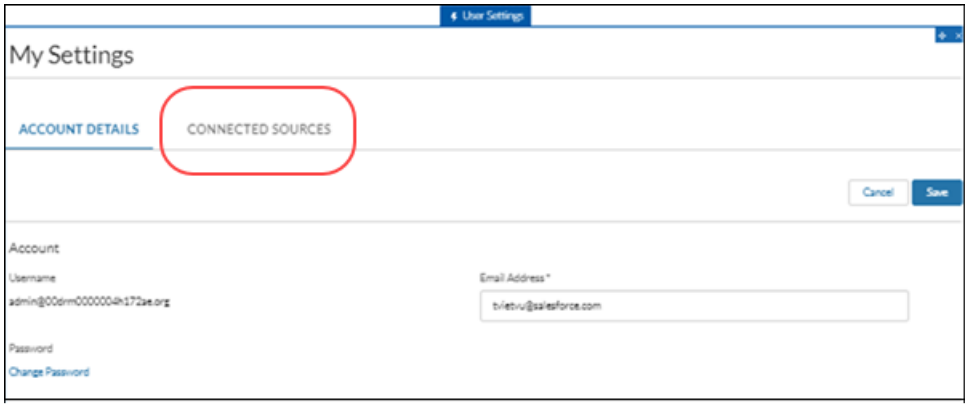
a. Create a permission set, for example *`Single Sign On Link`* in Setup.

b. Set "Is Single Sign-On Enabled" to *`On`* in System permissions.

c. Assign the permission set to appropriate users in your org.

"Change password" page no longer appears on their My Settings page.

Example: Partial view of the User Settings component with the Connected Sources tab called out:



SEE ALSO:

Which Components Can I Use with Each Template?

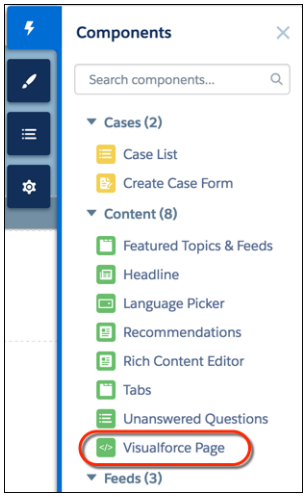
User Permissions

Visualforce Page Component

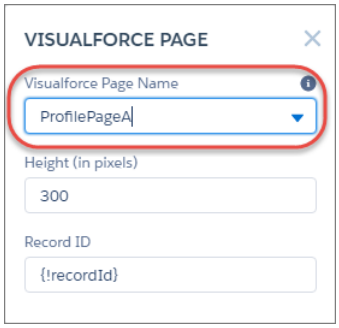
Use the Visualforce Page component to add existing Visualforce pages to the pages of your Customer Service-based community.

Note: The Visualforce Page component only supports the `navigateToURL` function. Relative and absolute URLs are supported. Relative URLs are relative to the community domain, and retain navigation history. External URLs—that is, URLs that are outside the community domain—open in a separate browser window.

1. In Community Builder, drag the Visualforce Page component from the Components panel onto the page.



2. Edit the component to select the Visualforce page to use. If you installed the Salesforce CPQ (Steelbrick) app, those pages are also available for selection here.



3. Adjust the height as you like.
4. Optionally, specify a Record ID if the Visualforce page. Typically, the system populates this value depending on context.

Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag and drop the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

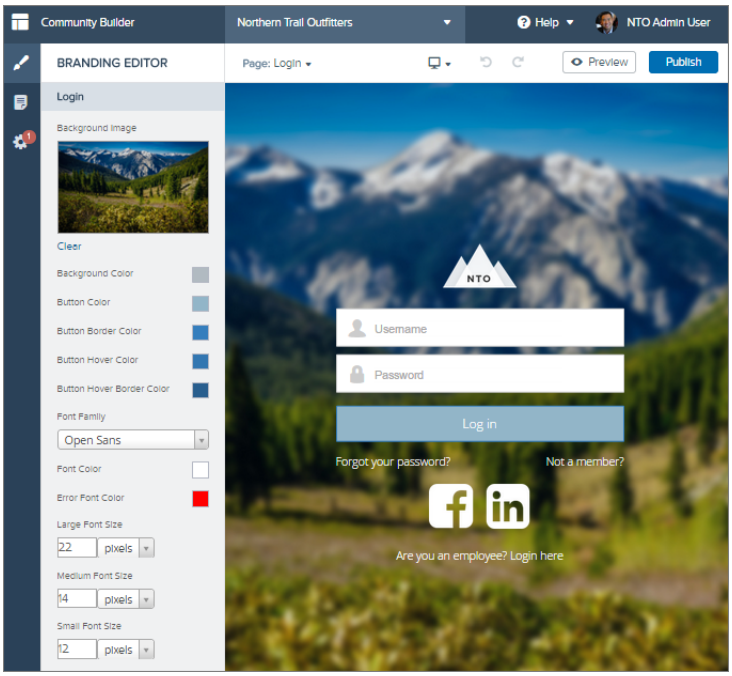
Login Components

Brand the Login Pages

Use the Community Builder to customize and brand the login pages with your own design. You can change the appearance of the login pages with a background image, color scheme, and font settings. Use Community Builder to set the background. Your preference applies to all login pages, unless you override the settings within an individual page.

1. Select **Go To Community Builder**, if you're not already in it.
2. From the Go To menu, select **Login**.
3. In the left pane, upload an image for the background, and set color and text preferences, as needed.

Example: The Branding Editor settings in Community Builder:



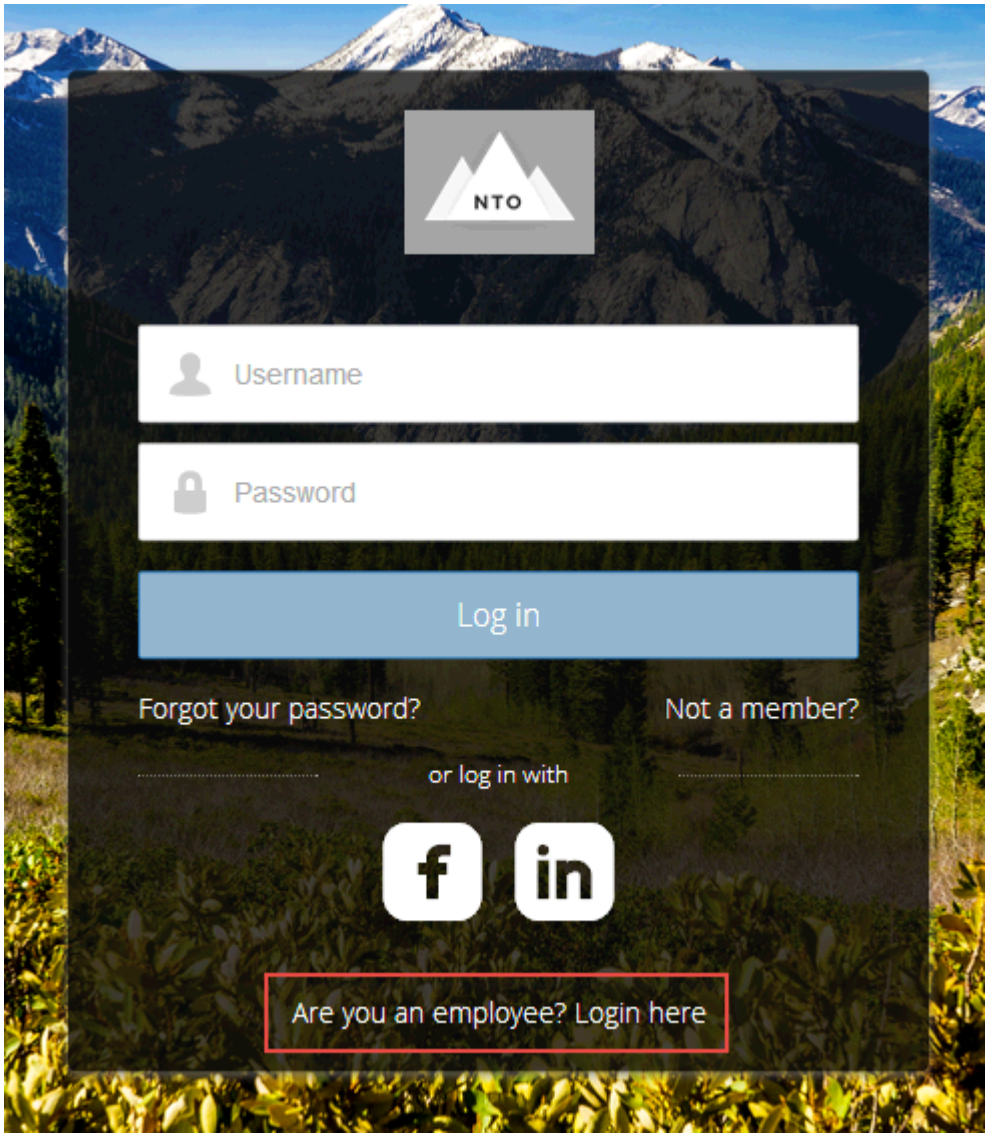
Employee Login Link

Use the Employee Login Link component to direct users with accounts in the community's parent org to their login page. When your employees or other users who have accounts in the parent org for the community end up on the community login page, you can redirect them to their own login page with a link. They can then log in with all the settings and permissions of their org account.

1. Select the **Employee Login Link** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Employee Login Link`	Enter text that identifies the login option for employees. The label appears as clickable text on the page. The default text is *`Are you an employee? Login here`*.

Example: Sample Employee Login Link component:



SEE ALSO:

Which Components Can I Use with Each Template?

Forgot Password

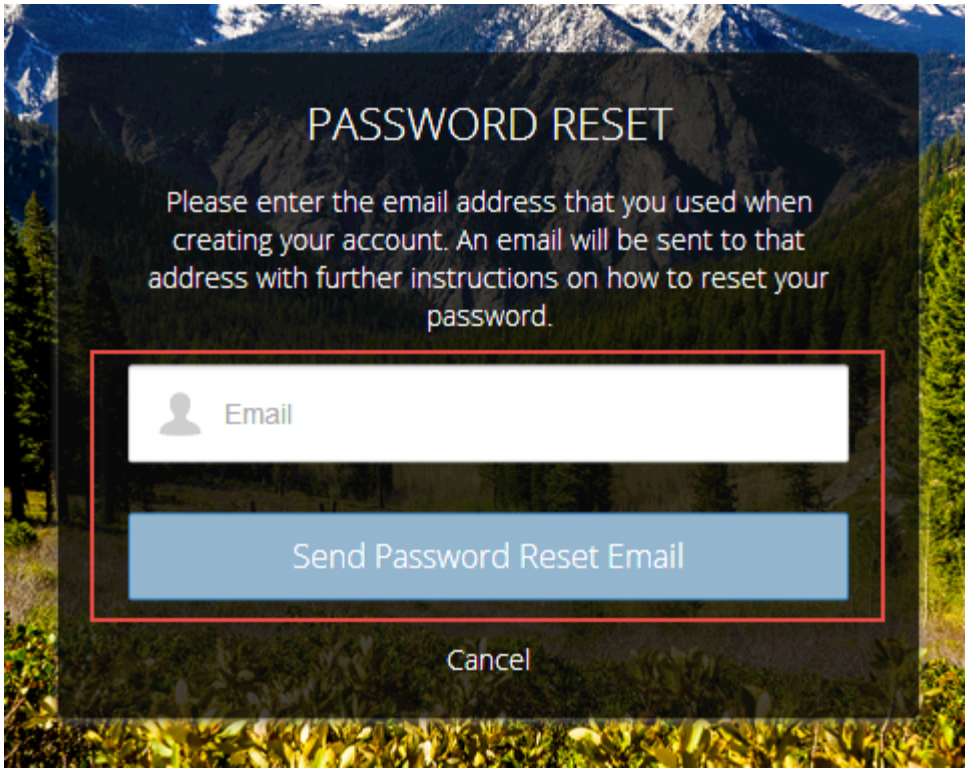
Use the Forgot Password component to let users request a new password.

Sometimes users forget their existing passwords and need a new one. The Forgot Password component gives users the ability to get one without contacting an administrator. The user enters the email address that's associated with the account, clicks the button, and gets email instructions for resetting the password.

1. Select the **Forgot Password** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Check Email URL`	Enter the view or path to the page that notifies the user when the password has been reset and an email has been sent.
`Username Label`	Enter the text that appears in the field where the user enters a valid username, which can be in the form of an email address if users are identified that way.
`Submit Button Label`	Enter the text for the button that the user clicks to make the password reset request.

Example: Sample Forgot Password component:



SEE ALSO:

Which Components Can I Use with Each Template?

Login Form

Let users log in with login fields for a username and password and a button for submitting both.

The **Login Form** component is a simple username and password form that lets users with an existing account log in to the community.

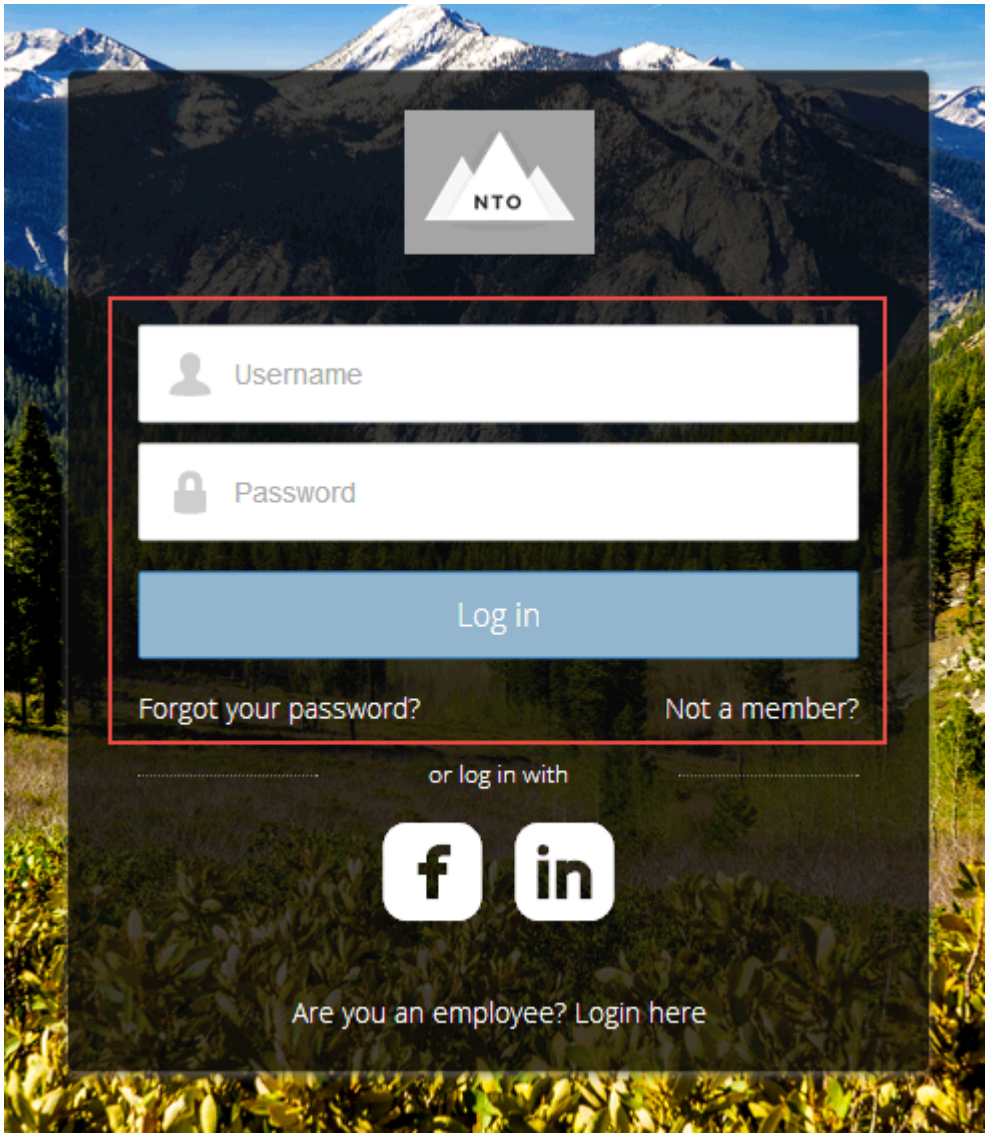
Note: If the community administrator deselects the username and password checkbox on the **Administration** > **Login & Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in the Salesforce Help.

1. Select the **Login Form** component in the page that you're configuring.

2. In the property editor, configure properties for the component:

Property	Details
`Start URL`	Enter the path to the page that users see after they log in successfully. This is the home page for the community.
`Username Label`	Enter the text for the username field label.
`Password Label`	Enter the text for the password field label.
`Login Button Label`	Enter the text for the button that the user clicks to submit the login request.
`Forgot Password Link Label`	Enter the text for the link to the page where users can request a password reset.
`Forgot Password URL`	Enter the page where users can request a password reset.
`Self Register Link Label`	Enter the text for the link to the page where users can complete a self-registration form.
`Self Register URL`	Enter the page where users can complete a self-registration form.

Example: Sample Login Form component:



SEE ALSO:

Which Components Can I Use with Each Template?

Self-Registration

The Self-Registration component lets users set up their accounts so that you don't have to add each one manually. Users put their information into the form fields, and when they click **Sign Up**, an account is created for them. This component has a basic set of fields that you can customize, and you can add more fields.

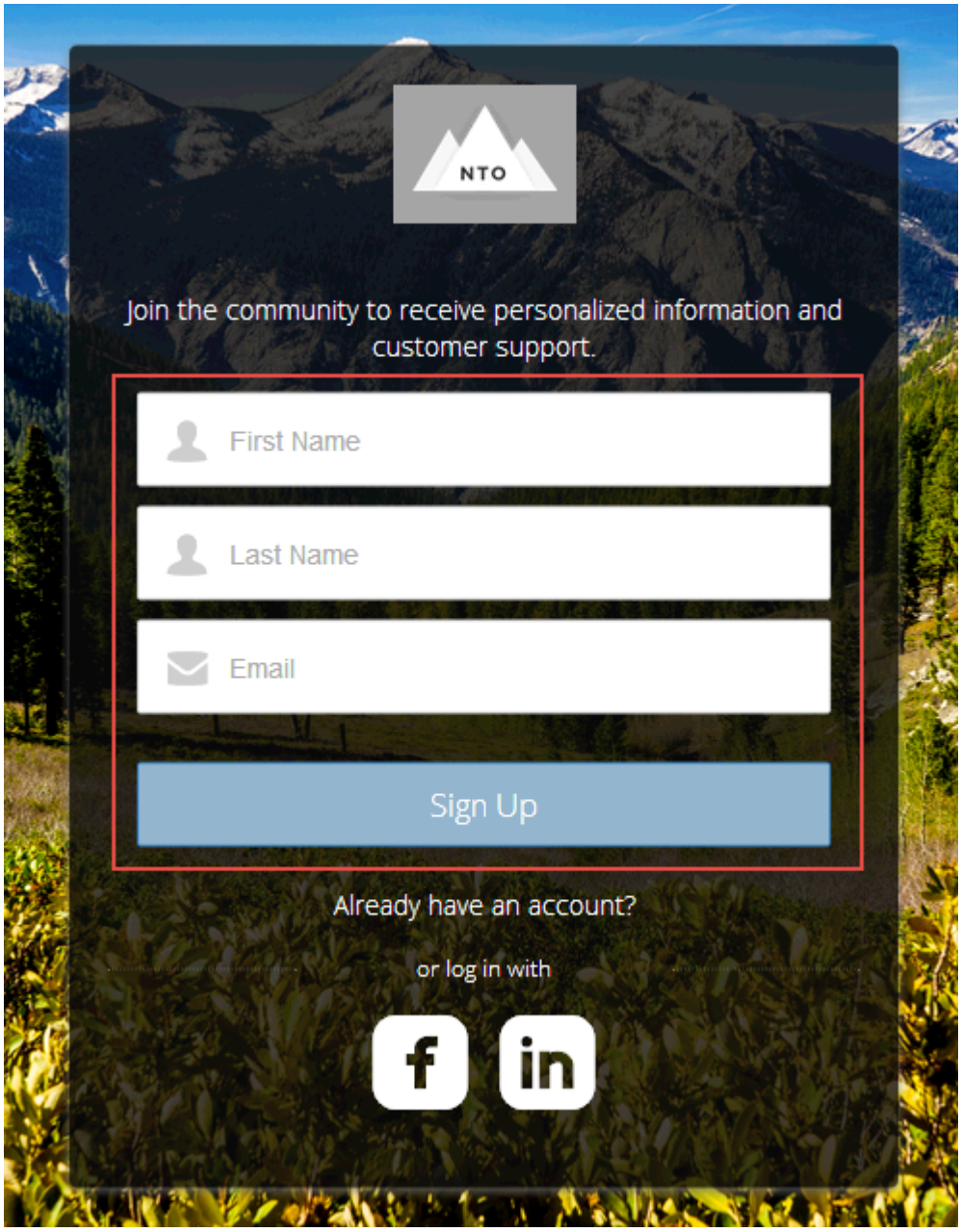
For this component to appear, go to Community Management and select **Administration** > **Login & Registration** > **Allow external users to self-register**.

1. Select the **Self Registration** component in the page that you're configuring.

2. In the property editor, configure properties for the component:

Property	Details
`Account ID`	Enter the variable expression for the account ID to associate with new users.
`Start URL`	Enter the path to the page that users see after they log in. This page is the home page for the community.
`Registration Confirmation URL`	Enter the path to the page to display after the user submits the self-registration form.
`First Name Label`	Enter the label text for the user's first name.
`Last Name Label`	Enter the label text for the user's last name.
`Email Label`	Enter the label text for the user's email address.
`Password Label`	Enter the text for the password field label.
`Confirm Password Label`	Enter the text for the field in which a user confirms the password. This field usually requests that the user retype the proposed password to make sure that it's correct.
`Submit Button Label`	Enter the text for the button to submit the form values.
`Include Password Field?`	Select this option if you want self-registering users to pick their own passwords. Otherwise, password information is provided in the email that they receive after they submit the form.
`Extra Fields Field Set Name`	Optionally, add fields to the form. If you've created a field set by using our API, enter the variable that's associated with the field set here. For example, you can write code that creates a field set to collect a phone number or other information.

Example: Sample Self-Registration component:



SEE ALSO:

Which Components Can I Use with Each Template?

Social Login

The Social Login component provides users with icons that they can click to log in to a third-party account, such as Facebook© or LinkedIn©. Set these icons for each authentication provider that you configure for the org.

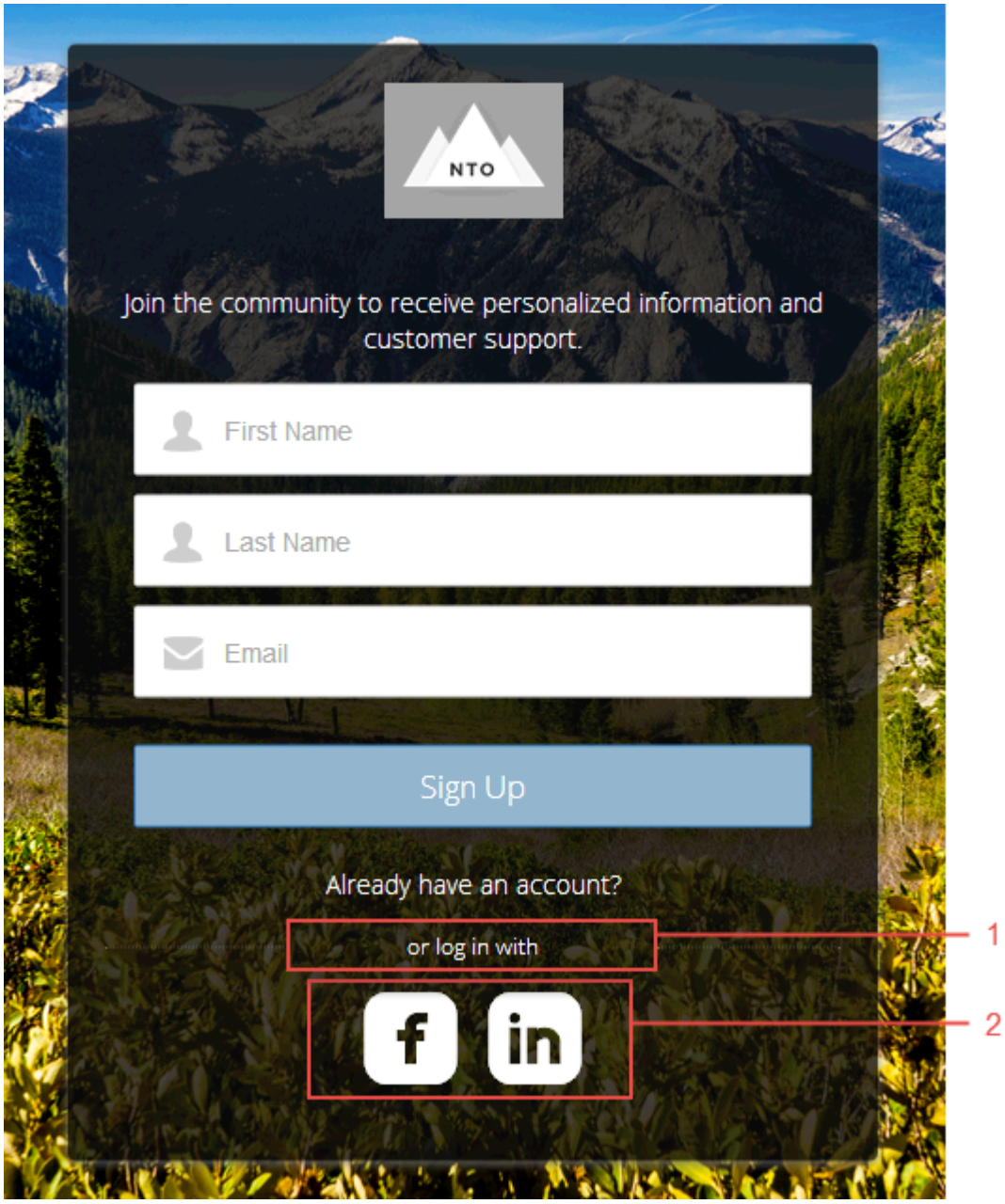
Some users prefer to use an existing account with a service such as Facebook to log in to the community instead of setting up a new account and password. The third-party service is an authentication provider that verifies the identification of the user. Use the Social Login component to add an icon for each supported authentication provider. The user clicks the icon and logs in using the associated account's username and password.

Before you add the Social Login component, set up each authentication provider. For more information, see "Configuring Authentication Providers" in the Salesforce Help.

1. Select the **Social Login** component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Show Header`	Select this option to show a text header above the authentication header icons.
`Header Text`	Enter the text for the header text.

Example: Sample Social Login component with "or log in with" text (1) and authentication provider icons (2):



SEE ALSO:

Which Components Can I Use with Each Template?

Customize Communities with Community Builder

Use templates to quickly set up a community and then customize it with your company's branding, share Salesforce records with community members, and work with them in a collaborative space that meets your needs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Community Builder Overview

Community Builder and community templates for self-service let you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

Manage Your Community's Pages and Their Properties in Community Builder

The Pages menu and Page Properties centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

Track Community Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views in your community. Enable access to your Salesforce data for deeper insights. Then, adjust your community's pages to more accurately reach your customers.

Multilingual Communities Overview

Community Builder lets you create different language versions of your community. All languages are maintained within the community so you don't have to create and manage a separate community for each language.

Community Builder Overview

Community Builder and community templates for self-service let you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

With Community Builder, you can:

- Quickly style the community to match your company's branding.
- Edit community pages and components with the Community Builder and customize their design and content.
- Preview your community and ensure that it appears correctly on different devices.
- Publish your changes so you can make them available to everyone in your community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Navigate Community Builder

Community Builder lets you quickly create and style your custom community to match your organization's branding.

Understanding Themes

A theme is a collection of information that defines the visual flow and experience of your site for your customers.

Find and Create Asset Files in Community Builder

Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Community Builder. Once uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

Community Builder Settings

Use the Settings area to track which template you're using, view your community's status, and customize your template. If you're using the Customer Service template, easily access your navigational and featured topic settings.

Preview Your Lightning Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices.

Publish Your Lightning Community Customizations

Publish your community in Community Builder to make your branding and component customization updates available to everyone in your community.

SEE ALSO:

Navigate Community Builder

Community Builder Settings

Navigate Community Builder

Community Builder lets you quickly create and style your custom community to match your organization's branding.

To access Community Builder:

- From the global header menu in Community Workspaces or Community Management, click **Community Workspaces** > **Builder** or **Community Management** > **Go to Community Builder**.
- From the All Communities page in Setup, click **Builder** next to the community name.
- From a community, click **Community Builder** in the profile menu.

In Community Builder, you can:

- Drag and drop Lightning components onto your page (1). The Components panel includes custom Lightning components from the AppExchange.
- Theme the community to match your organization's brand and style (2).
- View all the components on the current page (3). To edit a component's properties, select the component. You can also delete custom components and open them directly in the Developer Console.
- Edit community settings and accept updates to your community's template (4).
- Use the Communities menu (5) to:
  - Go to the community after it's activated.
  - Open Community Workspaces or Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
  - Return to **Setup**.
- Navigate to the community page that you want to edit using the **Pages** menu and **Page Variation** menu (6). Manage, create, delete, and set the visibility of pages in Page Properties for each page.

EDITIONS

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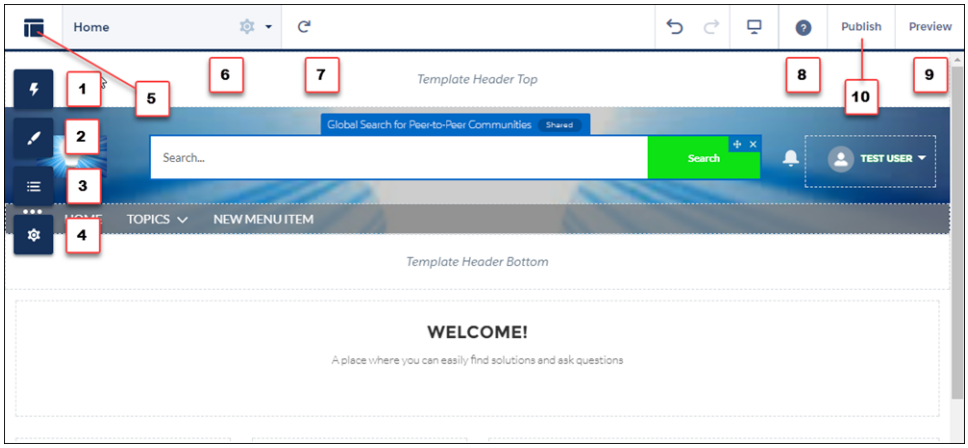
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

- Refresh the current page (7).
- See how your community appears on different devices (8).
- Preview the community in a new browser window (9).
- Publish your changes to make your updates available to everyone in your community (10).



SEE ALSO:

Community Builder Overview

Community Builder Settings

Understanding Themes

A theme is a collection of information that defines the visual flow and experience of your site for your customers.

Themes are made up of layouts and styles (such as colors, fonts, and images). These elements combine to give you granular control of the appearance and structure of each page in your community. Themes are all about the look and feel of your site and are independent of your content.

Example: The default Customer Service theme includes two layouts.

- **Login**, which applies the theme layout to the login pages.
- **Default**, which applies the theme layout to all non-login pages.

Your community comes with several pre-built themes that you can quickly customize to meet your needs. Pre-built themes work across all of our standard templates, such as Customer Service, Partner Central, Customer Account Portal, and Build Your Own. But how you style an applied theme is unique to each community where the theme is used. The theme that you select changes the headers, footers, and other properties that are available for your site.

Note: Though pre-built themes come with their own layouts, you can switch between available layouts as needed. You can even work with your development team to create custom components and layouts.

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Pre-Built Community Themes
Pre-built themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your community to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

Change Your Community's Theme
Experiment and find the theme that works best for your needs, without changing your content.

Use Branding Sets in Community Builder
Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Customize Your Community Theme
Customize themes you've activated by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

SEE ALSO:

Developer Guide: Dynamic Branding with Login Pages

Pre-Built Community Themes

Pre-built themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your community to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

Pre-built themes give you a head start with your community that you can easily customize further. After you've created a community and selected your theme, use Community Builder's Theme panel to adjust the experience.

This short video shows themes in action, Give Your Community Style with Pre-Built Themes.

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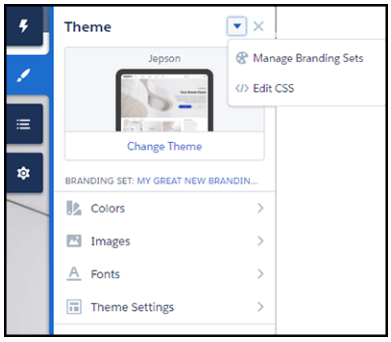
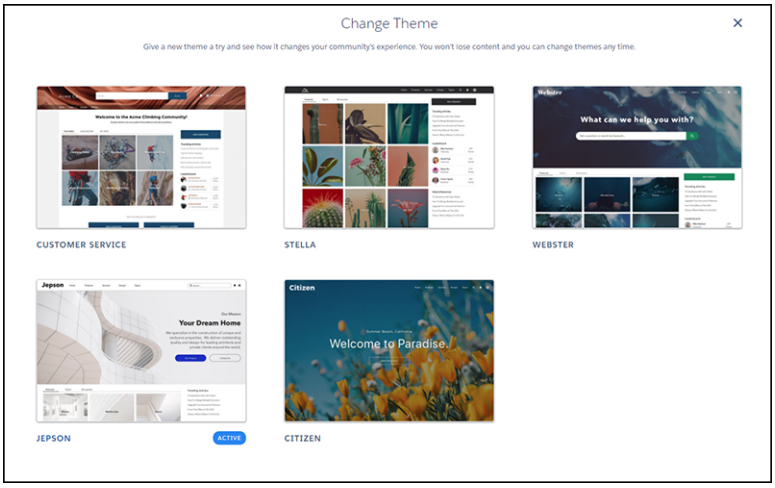


Click **Change Theme** to select a theme.



Depending on the theme you select, you can use Community Builder for various tasks.

- Choose colors for text, actions, links, navigation, and borders.
- Specify font family, style, weight, and case, and add a custom font.
- Change header and page background color.
- Choose a custom Search component.
- Choose a custom User Profile component.
- Use custom CSS to apply your own styles.
- Generate a custom color scheme from an image of your logo or company pallet.
- Use a branding set to quickly target different audiences and needs.

> **Note:** You can apply branding sets on an audience basis to change colors, images, and fonts. For information on targeting specific layouts or content to a specific group, see Audience Targeting.

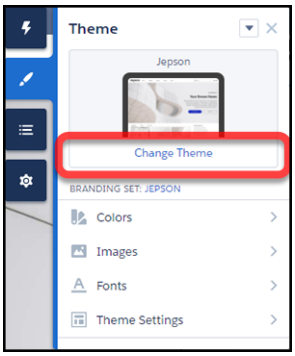
SEE ALSO:

- Community Builder Overview
- Preview Your Lightning Community with Community Builder
- Find and Create Asset Files in Community Builder
- Find and Create Asset Files in Community Builder
- Use Branding Sets in Community Builder
- Audience Targeting
- Change Your Community's Theme

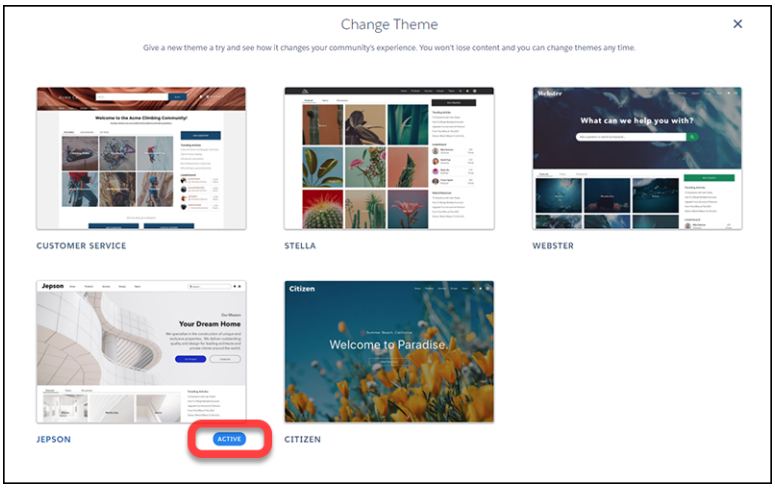
Change Your Community's Theme

Experiment and find the theme that works best for your needs, without changing your content.

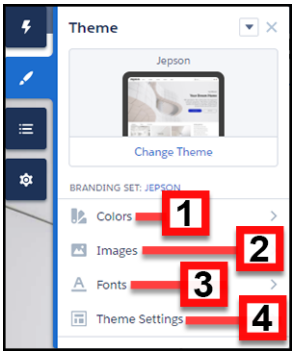
Changing themes is an easy, two-click effort in the **Theme** panel. Select **Change Theme** to see a list of available themes for your template.



Your current theme is flagged as **Active**. Select any other theme, activate it, and it's applied to your community.



Choosing a theme is just the start. The defaults may work out great for you, but you're not stuck with them.



- Adjust the **Colors** (1) of text, backgrounds, and borders.
- Upload background **Images** (2) and your company logo.
- Select **Font** (3) styles.
- Adjust **Theme Settings** (4) that are specific to the active theme. For example, choose:

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USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

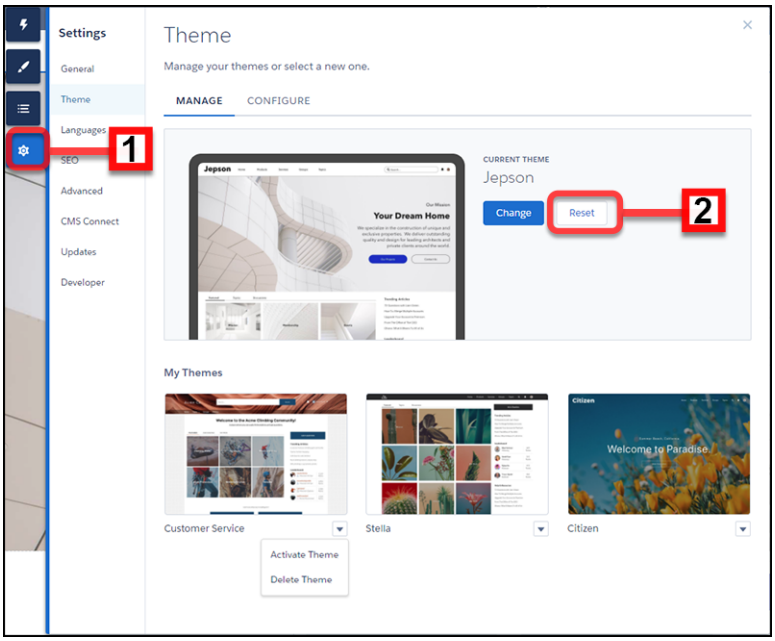
  - whether to show the hero
  - whether to keep the header from scrolling
  - the width of page content

    Note: Available settings are unique to the active theme.

- Add, modify, and adjust components on the page individually to complete the experience.

We remember the customizations that you create for your theme, even if you switch from the theme and then reactivate it later.

What if you don't like what you've customized? Easy, start fresh!



1. In Community Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

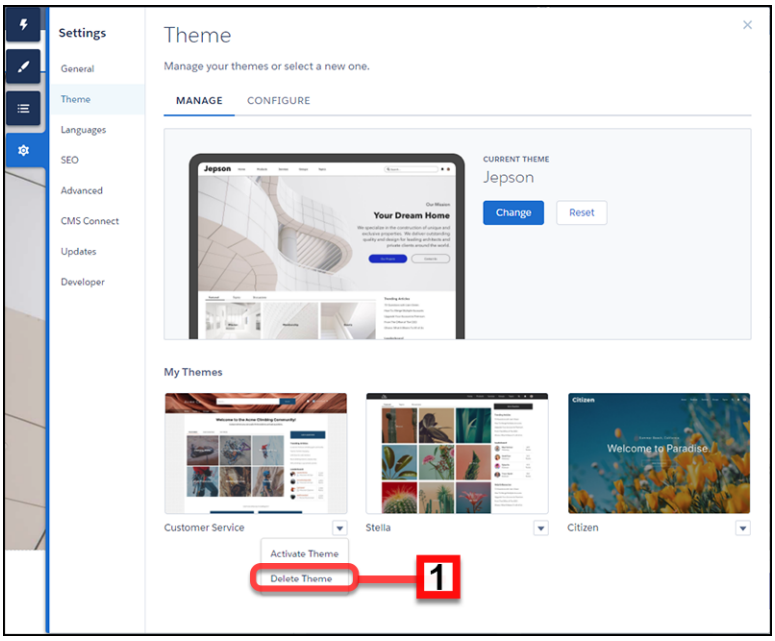
- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings are not retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Many pre-built themes have multiple layouts, such as home, login, and content pages.

While changing themes preserves your content, it may not display in a useful or desirable manner. Always reconfirm that your site still works the way you want it to after a change.

The Manage section of the Theme panel shows your currently active and configured themes.



Chances are you aren't using all of your themes, so you can delete (1) any extras here. Deleting a theme removes all of your customizations, similar to Reset. But you can add a fresh copy of the theme from the Change Theme section of the Theme panel.

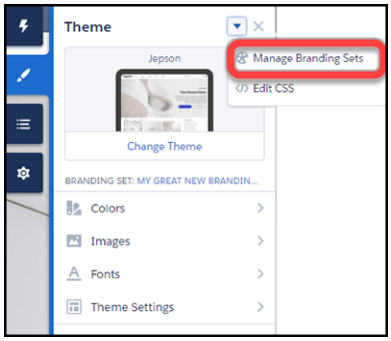
SEE ALSO:

- Custom Theme Layouts and Theme Layout Components
- Customize Your Community Theme

Use Branding Sets in Community Builder

Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Branding Sets are bundled collections of images, fonts, and colors that can dramatically and dynamically change the look and feel of your site. You manage branding sets in the Community Builder's Theme panel. If you are using a pre-built theme, the branding set doesn't affect the header and hero areas of your site.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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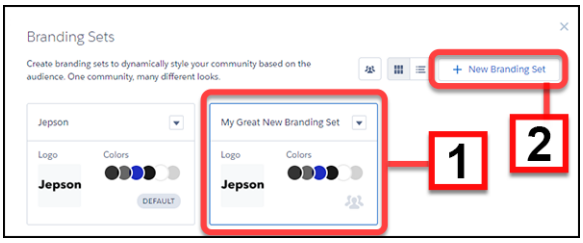
USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

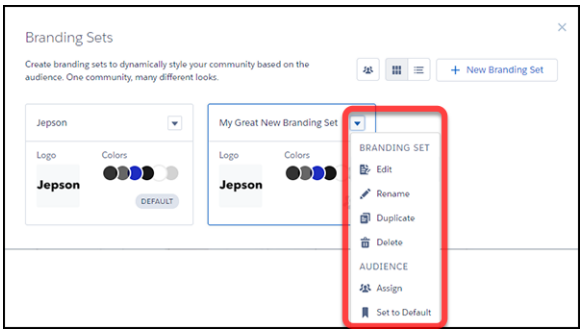
Note: Branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Audience Targeting.



You can maintain and manage several branding sets for any community. Each set (1) is a collection of colors and other elements that you can apply manually or programmatically, using Audiences. You can also start a new set from scratch (2).

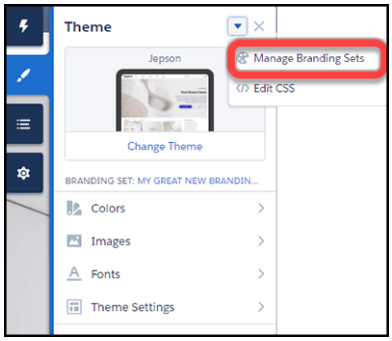
Note: While you can create many automatic responses to audience, Dynamic Branding, such as declarations of Action Color, doesn't work with pre-built themes.

Manage each set, from its menu.

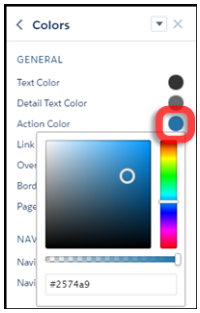


To create or edit a branding set, select it and the attributes you want to bundle.

1. Open the Theme panel and select **Manage Branding Sets**.



2. Choose the branding set to edit, or create one. All of your changes are associated with the selected branding set.
3. (Optional) Community Builder can generate a color scheme for you when you select **Generate Pallet from Image** in the Colors panel.
   a. In the Colors panel, click **Generate Pallet from Image**
   b. Choose your previously uploaded company logo or a different image, like an image of your company palette. Community Builder extracts the main colors from the image and generates a scheme.
   c. To modify colors, click the color swatch. To adjust the color, use the slider or enter hex values.

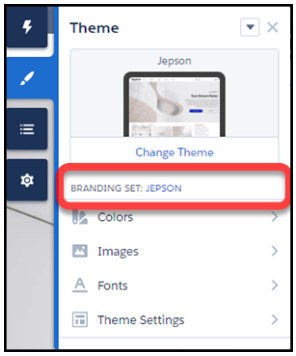


4. To set the attributes of your branding set, in the Theme panel, select or adjust the fonts, images, and colors.
   Your changes are saved automatically and appear instantly on the page. To review the results, select various page types from the Pages menu.

   Note: If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

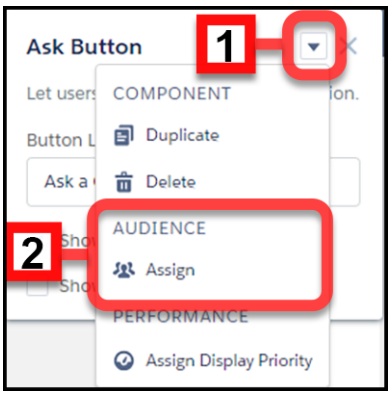
   When you add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library.

   You can always tell which branding set is active by looking at the Theme panel.



Remember that branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Audience Targeting

Note: Not all components in pre-built themes support audience targeting. You can confirm if a component can be targeted by looking in its component properties panel menu (1) for the Audience (2) section. If the section is missing or if there isn't a menu on the component properties panel, then the component doesn't support audience targeting.



If you can't find a way to control aspects of your site through the Theme panel or component properties, you can create your own CSS overrides. Your overrides apply to, and are remembered for, the currently active theme. Click > **Edit CSS** on the Theme panel to use your own CSS styles. Use CSS sparingly, and only when necessary, because future releases of template components might not support all CSS customizations.

SEE ALSO:

Audience Targeting

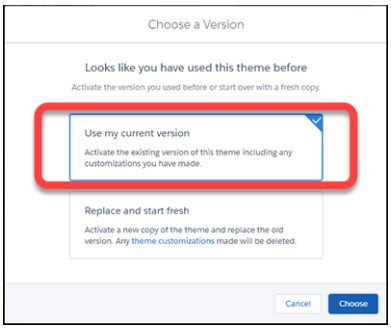
Developer Guide: Dynamic Branding with Login Pages

Customize Your Community Theme

Customize themes you've activated by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

Every pre-built theme is loaded with options to help you achieve the experience you want without ever dealing with code. And we remember how you set up each theme so you can change between them easily.

If you previously customized a pre-built theme, when you reactivate it you can decide to use your current settings or replace them and start over.



Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets

EDITIONS

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- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings are not retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

While changing themes keeps your content, the resulting page layouts may not be what you want. After a change, confirm that your site still works the way you want.

IN THIS SECTION:

Adjust the Look and Feel of Your Theme

Pre-built themes come pre-configured, but you can change that configuration. In addition to customizing the layouts, you can configure colors, fonts, images, sizes, and actions with a ton of choices and levers.

Theme Guidance: Header Components

Headers provide context and easy navigation throughout a site.

Theme Guidance: Hero Component

Hero images are large images that are designed to dominate the visual field of a page and grab attention.

Theme Guidance: Search Component

Multiple search components and placement options give you flexibility to design the right experience for your customers.

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your community. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own community, custom theme layouts make it easy to rebrand.

SEE ALSO:

Developer Guide: Build a Condensed Theme Layout Component

Trailhead: Create a Custom Theme Layout Component

Adjust the Look and Feel of Your Theme

Pre-built themes come pre-configured, but you can change that configuration. In addition to customizing the layouts, you can configure colors, fonts, images, sizes, and actions with a ton of choices and levers.

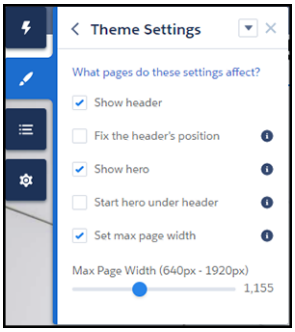
You may be asking yourself: All those controls, where do I start?

Start with the broadest settings. The **Theme Settings** section of the Theme panel contains general settings that affect your entire theme. These settings vary depending on your site's active theme.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Setting	Description
Show header	Shows or hides the header.
Fix the header's position	Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling a long page. To see this working, publish and preview your site. The change doesn't appear in Community Builder.
Show hero	Shows or hides the theme's hero image.
Start hero under header	Positions the hero image at the top of page, under the header, to provide a seamless look.
Set max page width	Sets the maximum width of the content across the page. Similar settings are in several component panels. The maximum width may be narrower than the overall display size of the header or hero.

To create different layouts for different pages, in Community Builder, go to **Settings** > **Theme** > **Configure**.

Each component type has different attributes that you can adjust in their property panels. Select a component to open its property panel and configure its options. Play with the settings to see what effects you can achieve. Changing your layouts doesn't affect your content directly, only how it's displayed. If you end up with something you don't like or can't use, and forget how to undo it, you can start over.

1. In Community Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings are not retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Theme Guidance: Header Components

Headers provide context and easy navigation throughout a site.

One header, lots of controls

Headers have many options and controls for changing the look and feel of a page. Options and controls include the height, color, transparency, and even whether it stays fixed to the top of the screen while customers scroll. Combining adjustments to your header with adjustments to your hero section, if you use it, offers usability, variation, and visual interest. Explore the components property panel for your header and **Theme Settings** in your heme panel.

Different headers for different types of pages in the same site

It's common to have a different layout for your login page. Many pre-built themes have different options for the login, home, and other pages. A change to the header on the home page, for instance, may not be reflected on your content or login pages. If you employ different theme layouts, configure the changes for each variation separately, as you did in previous releases.

Changing the logo

If you already set a logo for your community, it is recognized and used by pre-built themes. If you haven't set a logo in the past or want to update your current choice, use the Images area of the Theme panel.

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USER PERMISSIONS

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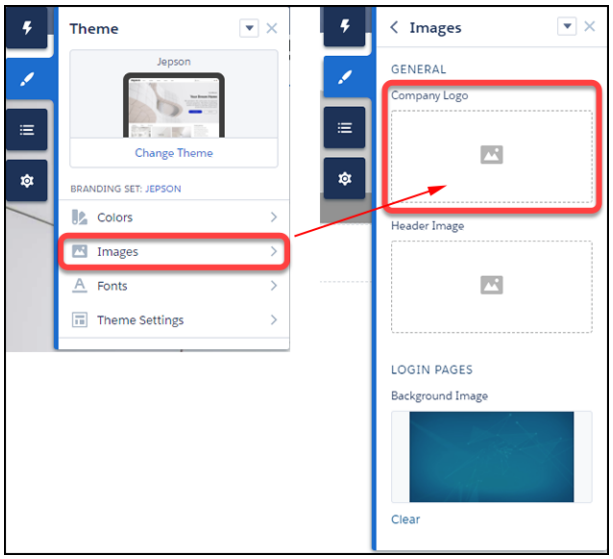
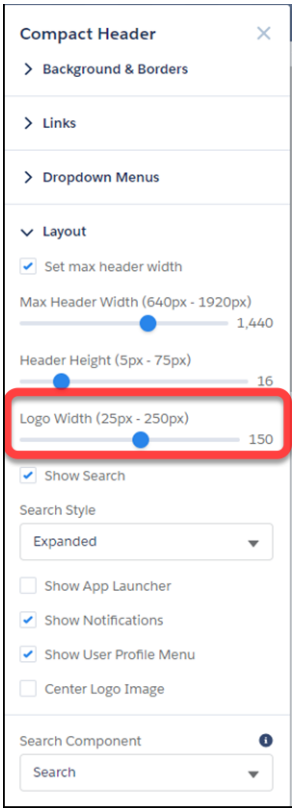


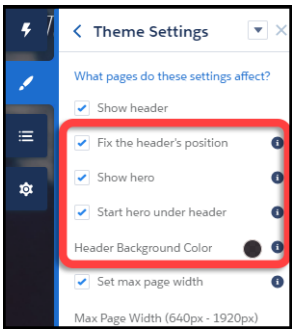
Branding sets let you apply different logos to different variations of your site or for different audiences and occasions.

Note: We try to resize your logo to fit the header. But you can adjust the size manually in the header component properties panel, using **Logo Width** in the Layout section. Your logo proportionally resizes relative to the width selected.



Header and hero interaction

- When "Fix the header's position" and "Start hero under header" are both enabled in **Theme Settings**, choose a background color for best visibility. If you leave the background transparent, when a customer scrolls down the page, the menu items in the header may no longer be visible. Menu items can be hidden because the hero image has scrolled out of view. A solid background color avoids this problem.



Audience targeting

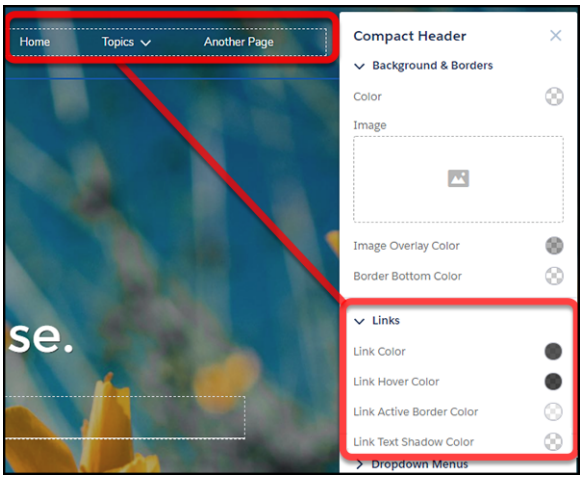
The new theme components (for example, Compact Header) don't currently support component-level targeting (visibility). However, with a little effort, it's still possible to set up targeting.

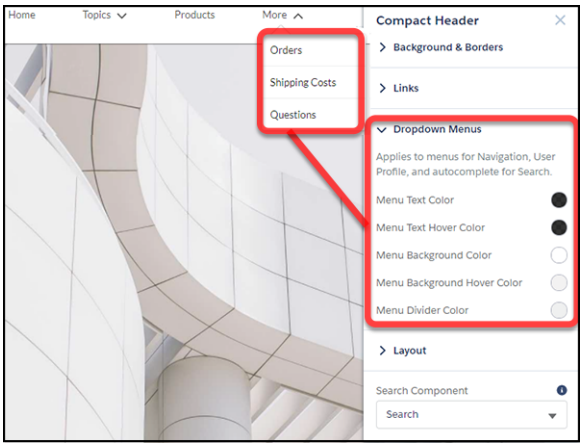
1. Create a custom theme layout in Community Builder **Settings** > **Theme** > **Configure**.
2. Create a page variation.
3. Assign the new theme layout to your page variation (via Page Properties).

Finding the right controls.

With so many options, it can be easy to miss which control affects which part of your header.

Menu text color formats the options that appear on dropdown menus, like profile menus, navigation menus, and search deflection. Link color formats link text and icons that are visible in the header.





Mobile display

Specific aspects of the theme component properties, such as header height, are hard-coded for mobile devices using the Salesforce Lightning Design $mq-small media-query. The setting results in a maximum width of 47.9375 em.

Theme Guidance: Hero Component

Hero images are large images that are designed to dominate the visual field of a page and grab attention.

Hero layouts are all about visual impact. The *hero* is an image that dominates your page, providing a sense of theme, style, and purpose. But while hero layouts are excellent for setting mood and style, they eat up space. So they're not good for a page that needs a lot of functionality.

A search versus a call to action focus

Pre-built themes come in two different flavors that focus on different needs: hero search and hero call to action.

- Uses for hero search
  - Sites that serve as an entry to a lot of diverse information with no easy way to provide a top-level organization.
  - Sites where it is challenging to predict customer needs or where your customers' information needs vary widely.
- Uses for hero call to action
  - Sites with a focused purpose, like fund-raising or a supporting a specific event.

Selecting and swapping hero components

The Webster, Jepson, and Citizen themes each come with a pre-configured hero theme component (Search or Call to Action). You can use these themes as they come or easily swap them through the component properties in Community Builder.

Like the theme but don't want to use the hero style layout? Easy, uncheck **Show hero** on the **Theme Settings** tab of the Theme Panel.

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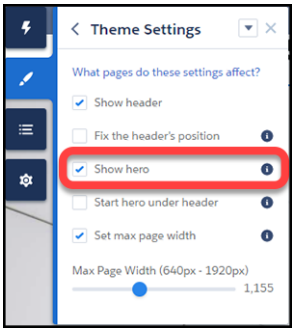

Header and hero interaction

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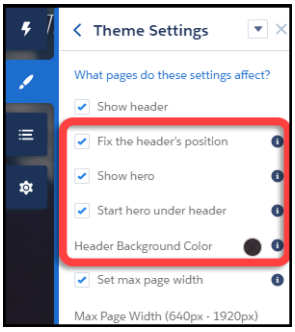
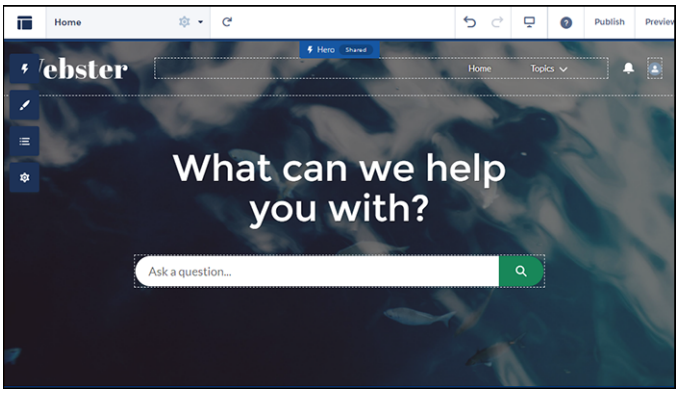


Theme Guidance: Search Component

Multiple search components and placement options give you flexibility to design the right experience for your customers.

Pre-built themes offer the flexibility to have a search-first approach. This approach encourages customers to enter questions first to find answers rather than navigate through menus and pages.



But you can also have search in your header. To avoid confusion and clutter, if you're using the hero with search turned on, deselect search to hide it in your header. Themes with heroes have secondary layouts for the non-Home pages. That's why search is on by default in the header of your other non-login pages.

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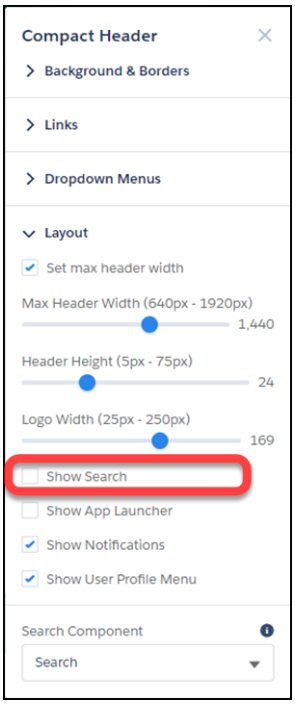
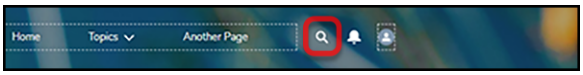
Note: Remember that Login pages have their own specific layouts.



Selecting a search component that collapses and expands



When the search component is collapsed, you can't select it directly. Click the search icon to expand it, then select it to see its property editor. Alternatively, select **Search** in the page structure panel to bring up its property editor. Selecting Search in the page structure panel means you can't see any changes you're making. You can't see your changes because the search component isn't visible on the page.

Exporting a custom search component

Imagine that you're using a Lightning Bolt Solution to export a community with a pre-built theme. The theme uses the global search, peer-to-peer component, or a custom search component. Keep in mind that this solution doesn't include the custom search component. The search component isn't exported because the property value `commThemeSearch` is not included in the Lightning Bolt Solution.

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your community. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own community, custom theme layouts make it easy to rebrand.

A theme layout component is the top-level layout (1) for the template pages in your community. Theme layout components are organized and applied to your pages through theme layouts. A theme layout component includes the common header and footer (2), and often includes navigation, search, and the user profile menu. In contrast, the content layout (3) defines the content regions of your pages. The next image shows a two-column content layout.

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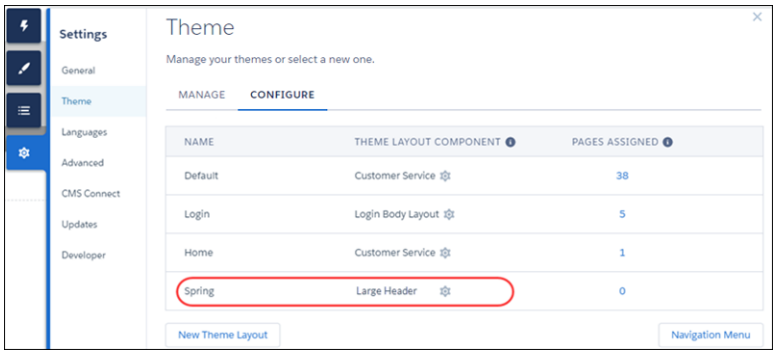
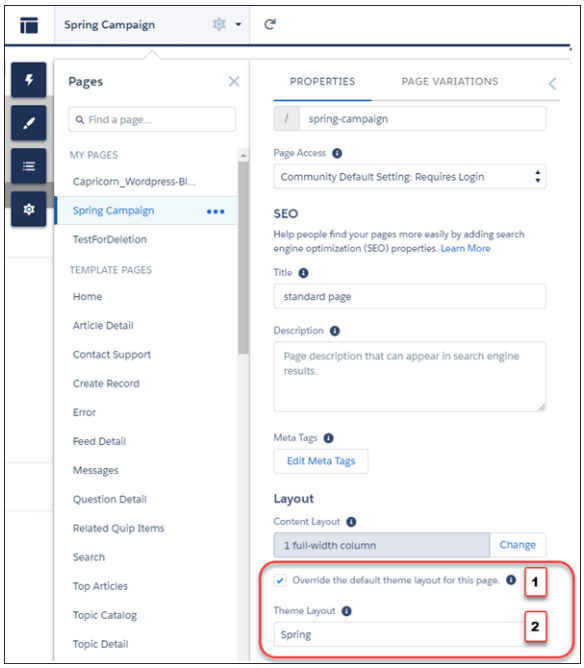
A theme layout categorizes community pages that share a theme layout component. You can assign a theme layout component to any theme layout. Apply the theme layout in the page's properties.

Note: To create custom theme layout components in the Developer Console, a developer implements the `forceCommunity:themeLayout` interface. All of our pre-built themes are developed on top of this interface and also use several design property interfaces (color picker, image picker, slider) in Community Builder. Pre-built themes also take advantage of theme swapping. You can quickly change the overall look and feel of the community without impacting any of the underlying pages, page layouts, and components.

Example: Let's say you create three pages for your upcoming Spring campaign. You want them to use the Large Header theme layout component that your developer created. In the **Settings** > **Theme** area, you add a custom theme layout called Spring to categorize these pages and assign the Large Header layout component to it.



Next, apply the Spring theme layout in each page's properties, which instantly applies the Large Header layout to each page.



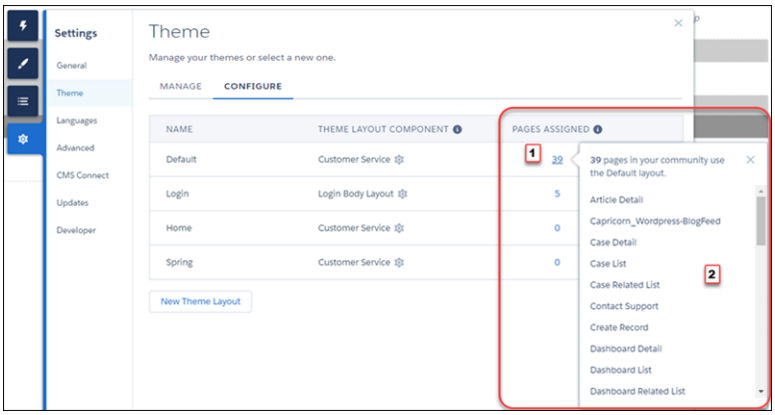
To apply the theme layout, select **Override the default theme layout for this page** (1). This selection shows the **Theme Layout** options. Then, choose the new layout (2) from the available choices.

Everything looks rosy until your VP of marketing decides that the header takes up too much room. That's an easy fix because you don't have to update the properties of each page to change the theme layout. Instead, with one click in the Theme panel, you can switch Spring to the Small Header layout component and instantly update all three pages!

Example: Now let's say that the Small Header layout includes two custom properties—Blue Background and Small Logo. You enabled and applied these properties to all your campaign pages. However, for one page, you want to apply only the Small Logo property.

In this case, you could create a theme layout called Spring B, assign the Small Header layout component to it, and enable Small Logo. Then, you apply the Spring B theme to the page.

Not sure which pages are associated with any of your theme layouts?



With a click and a glance, you can see how many and which pages are associated with any of your theme layouts. From **Settings** > **Theme**, click the Pages Assigned total for any theme layout row (1). Clicking this value opens a list of the pages associated with that theme layout (2).

Theme layouts make it easy to reuse the same theme layout component in different ways while maintaining as much granular control as you need.

SEE ALSO:

- Change the Theme Layout of Your Community's Pages
- *Lightning Communities Developer Guide*: Create Custom Theme Layout Components for Communities
- *Lightning Communities Developer Guide*: Configure Swappable Search and Profile Menu Components
- Developer Guide: Build a Condensed Theme Layout Component
- Trailhead: Create a Custom Theme Layout Component

Change the Theme Layout of Your Community's Pages

A theme layout defines the top-level regions of your page, such as the header and footer, navigation, search, and the user profile menu. A theme layout component categorizes the pages in your community that share a theme layout.

A developer creates custom theme layout components in the Developer Console by implementing the `forceCommunity:themeLayout` interface. The developer can also add properties to a custom theme layout, which you can configure in the Theme panel area in Community Builder. When the custom layout component is available, assign it to a theme layout to instantly transform the pages that use that layout.

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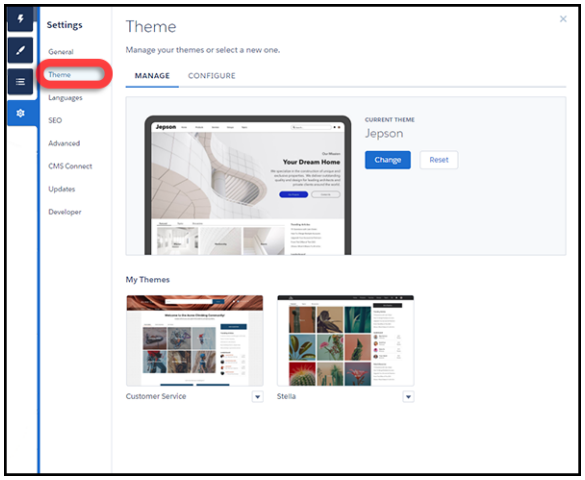
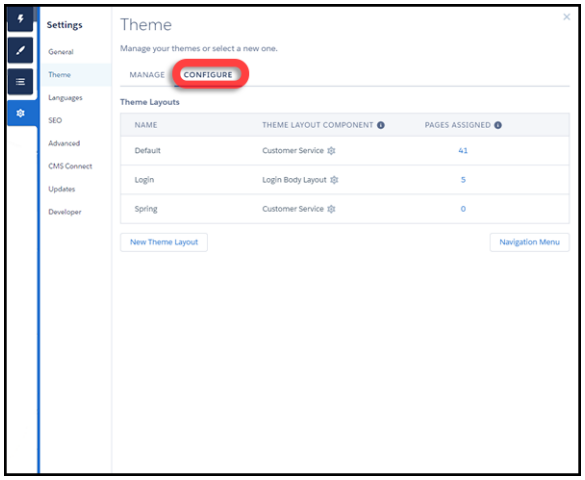
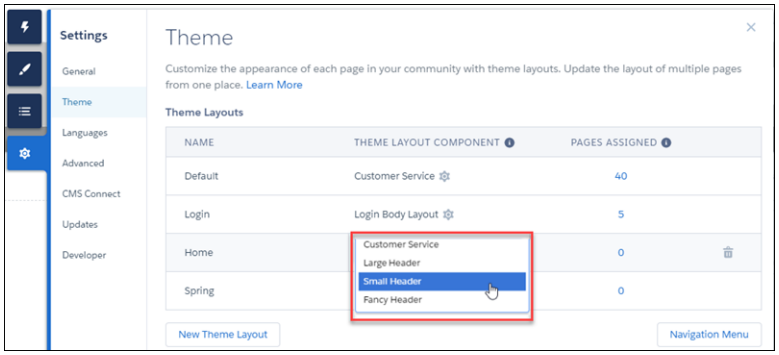
1. In Community Builder, click the gear icon in the left sidebar and then click **Theme**.



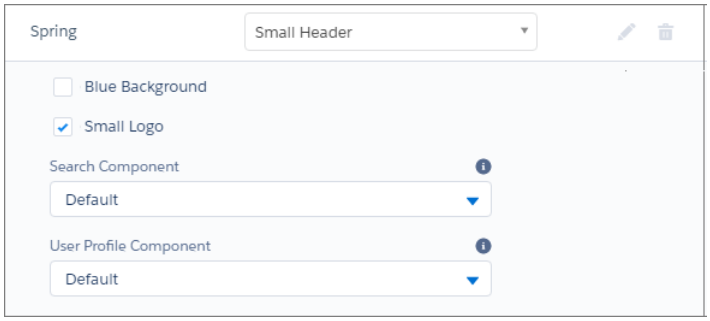
2. To view and configure your theme layouts, select **Configure**.



3. If necessary, create a **New Theme Layout**.
4. Select a theme layout component for the theme layout.



5. Update the theme layout's settings, if available—properties vary depending on how your developer configured the theme layout component.



For example, the Default layout component in the Customer Service theme includes the following options for the header region.

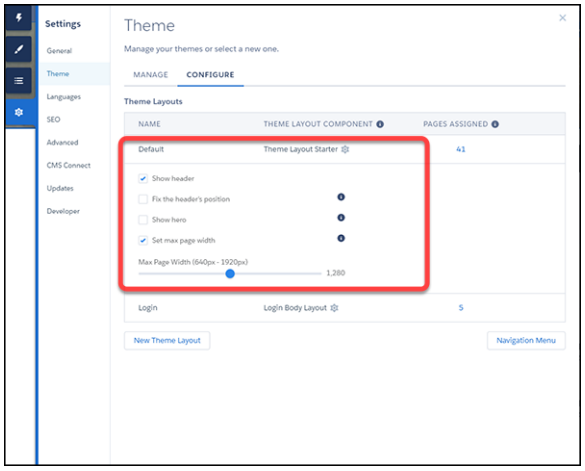
Hide the header region and navigation
Hides the default community header on all community pages. The default community header includes the header image, search box, community menu, and user profile navigation menu. Select this option if you want to replace the default header with a custom header.

Hide notifications icon in community header
Hides the notifications icon. Useful when you have a custom header or don't use notifications.

Search Component
Replaces the default Search and Post component with a custom component, if available.

User Profile Component
Replaces the default Profile Header component with a custom version, if available.

However, the Default layout component for the Jepson theme has different options.



Show header

Displays or hides the header.

Fix the header's position

Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling down through a long page. To see this working, publish and preview your site. The change doesn't appear in Community Builder.

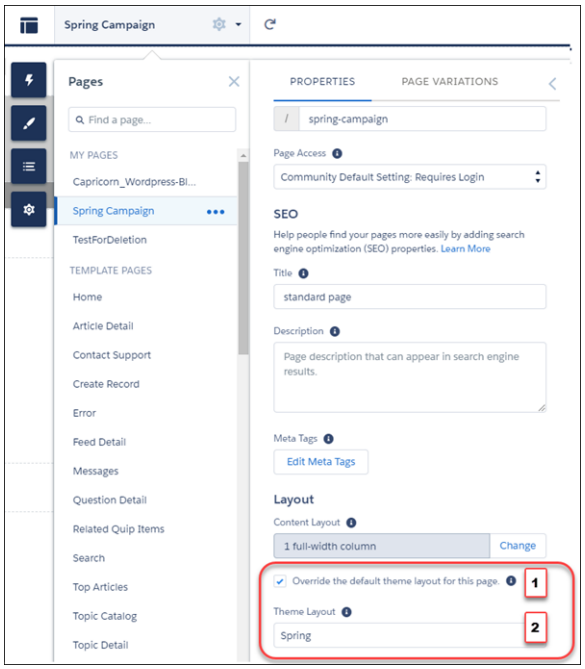
Show hero

Displays or hides the theme's hero image.

Set max page width

Sets the maximum width of content across the page. Similar settings are in several component panels as well. The maximum width may be narrower than the overall display size of the header or hero.

6.



To apply the theme layout, select Override the default theme layout for this page (1). Selecting this option shows the Theme Layout options. Then, choose the new layout (2).

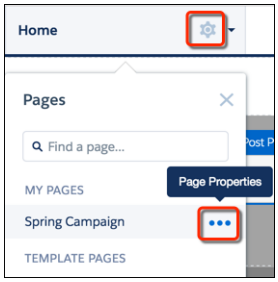
SEE ALSO:

- Custom Theme Layouts and Theme Layout Components
- Page Properties and Types in Community Builder
- *Lightning Communities Developer Guide*: Create Custom Theme Layout Components for Communities
- *Lightning Communities Developer Guide*: Configure Swappable Search and Profile Menu Components

Change the Content Layout in Community Builder

Quickly change the look of your community's pages by switching to a different content layout. You can even create your own custom content layout components in the Developer Console and import them to use in your community.

1. In Community Builder, open the page's properties. Click beside the page on the top toolbar, or click beside the page in the Pages dropdown menu.



2. In the Layout section of Page Properties, click **Change**.

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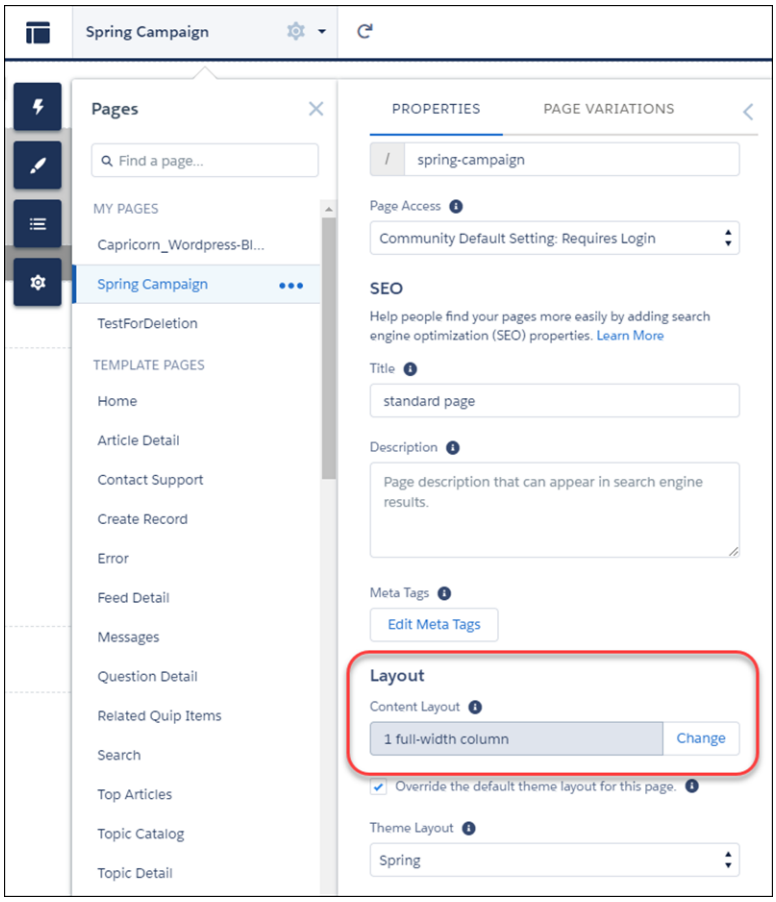
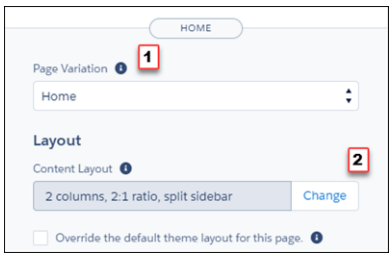
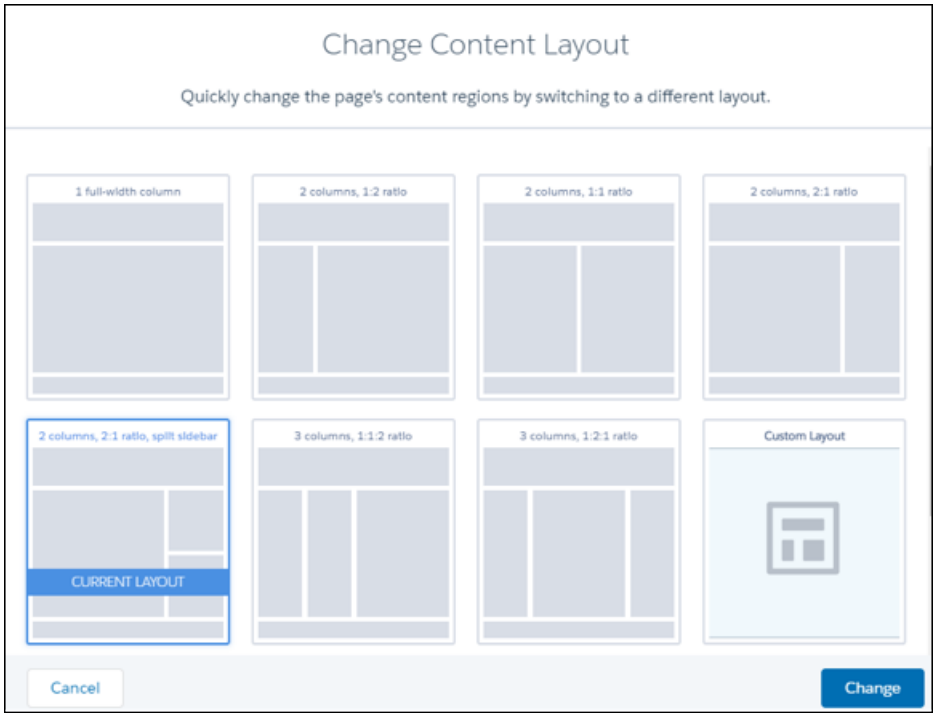


If a page variation is available, you can make it the active page by selecting the page variation in the Layout section (1). You can also change the content layout of each variation as required (2).



3. Select the new layout. If you created a custom content layout component, you see both ready-to-use and custom content layouts displayed together.



4. Click **Change**.
   If the structure of the new layout is different from the current layout, some regions are not visible. However, the regions are still available and you can switch to a different layout at any time.

   Note: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

SEE ALSO:

Lightning Communities Developer Guide: Create Custom Content Layout Components for Communities

Find and Create Asset Files in Community Builder

Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Community Builder. Once uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

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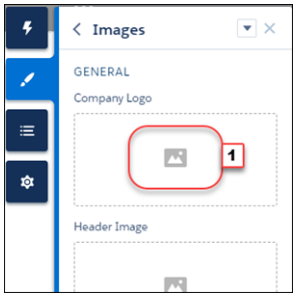
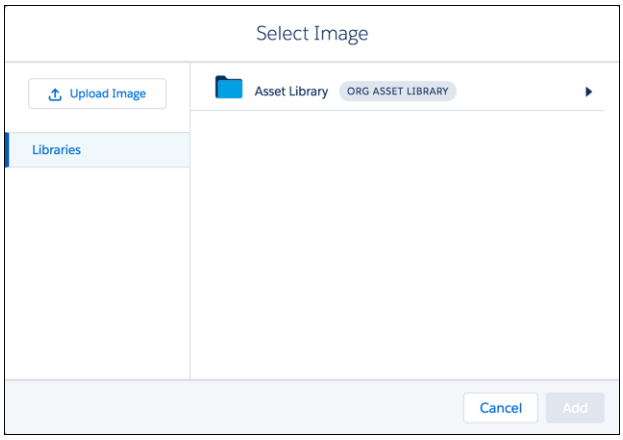
1. From Community Builder, open the Theme panel and select **Images**. Click an image icon (1) to open the unified file selector.



The file selector displays only image files, so you don't have to wade through all your files to find your logo or header image. If the image file you want is already an asset file, it's in the asset library, which is clearly marked by the Org Asset Library badge. Asset files for your Salesforce org and all your Communities are stored in the Org Asset Library, so you don't need to maintain copies in different places.

2. Select an existing file or click Upload Image to add a new one.



When you add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library. Admins have full access to the Org Asset Library and can search for, tag, and subscribe to asset files.

To provide library access to users, add them as members of the library with the appropriate permissions. Users without these permissions don't see the Org Asset Library. The Org Asset Library is available in all new orgs, and is automatically activated in existing orgs.

Note: If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long

as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

SEE ALSO:

Create Libraries

Manage Library Permissions

Community Builder Settings

Use the Settings area to track which template you're using, view your community's status, and customize your template. If you're using the Customer Service template, easily access your navigational and featured topic settings.

To access the Settings area in Community Builder, click on the left sidebar.

EDITIONS

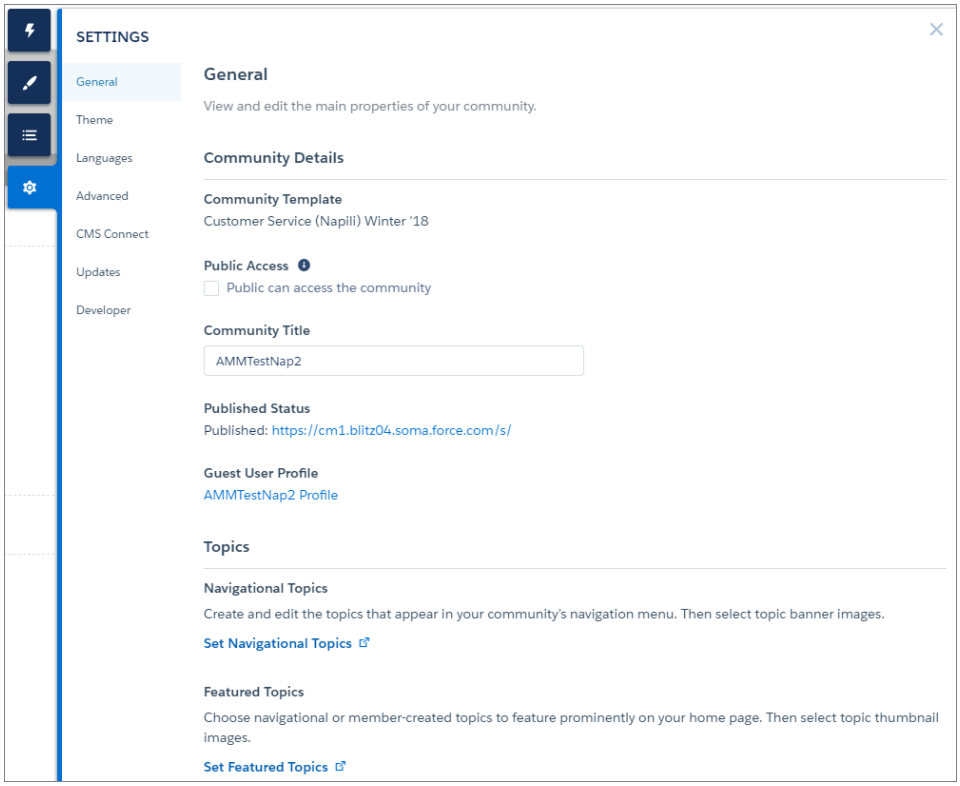
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



General

In the General area, settings include:

Community Template

Displays the name and version of the template that your community is using.

Page Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

Community Title

Lets you set the title for your community. The title briefly appears in the browser's title bar before your community's Home page loads.

Published Status

Indicates whether your community is published. If it's published, click the link to open the live community in a separate browser tab.

Preferred Domain

Lets you choose which domain to use for indexing your community's pages to improve search engine results. (Multiple domains for the same community can dilute search engine results and lower page ranking.) The Preferred Domain dropdown appears only after you set up domains and custom URLs for your community in Setup.

If the Require Secure Connections (HTTPS) option is enabled in Site Configuration in Site.com Studio, you can set only HTTPS preferred domains.

Guest User Profile

Displays the associated guest user profile. Clicking the link takes you to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see Give Secure Access to Unauthenticated Users with the Guest User Profile.

Set Featured and Navigational Topics *(Customer Service template only)*

Define featured topics and topics to be used for navigation in Community Workspaces or Community Management.

Theme

In the Theme area, you can control the layout and appearance of each page in your community.

Languages

In the Languages area, set the multilingual properties for your community. When set, these properties are used by the Language Selector component, which lets guest users select their preferred language on a page in your community.

Advanced

In the Advanced area, you can track page views, mask IP addresses, add markup to the page head, and show all components in the Components panel.

By default, we filter the components available in the Components panel according to each page's purpose. For example, the Case Comments Publisher is available only for the Case Details page. When you enable **Show all components**, you see the complete list of components when you open the Components panel for any page (except login pages). However, you can still only add the Related Questions List component to the Question Detail page and the Related Articles List component to the Article Detail page.

Important: Some components require the page to pass specific parameters. When you remove component filtering, you can add a component that relies on a passed parameter to a page that doesn't pass any values. For the component to work correctly, you must manually configure the component's parameters.

For example, some components that take `{!recordId}` as a parameter expect to get this value from the page's URL. If you add the component to a page that doesn't pass this value through the URL, you must manually provide it.

Similarly, let's say you add the Group Detail component, which requires a `{!recordId}` value, to the Case Detail page instead of the Group Detail page. Although both pages pass a `{!recordId}` value, the ID that Case Detail passes is incorrect.

CMS Connect

Add a header and footer from a connected CMS source to your community.

Updates

In the Updates area, you can update your community's template to the latest version.

Developer

In the Developer area, you can export customized Lightning Community templates and pages. You can add these templates and pages to a Lightning Bolt Solution to distribute to other orgs or publish on AppExchange.

Update Your Community's Template

We introduce amazing features and enhancements with every release, so it pays to keep your community up-to-date! Typically, we automatically update your template to the latest version, so you can start adding the newest features to your community right away. However, when the changes are significant, you're required to update your template manually.

Note: All improvements to the Lightning community templates are made on the latest version. Avoid missing out by keeping your template current.

The Koa and Kokua templates are in a phased retirement. From Summer '17, you can no longer use them to create communities. We therefore recommend working with Salesforce Support to replace your existing Koa and Kokua communities. Take advantage of the latest Lightning community templates, which provide richer support for Knowledge and case management, along with a slew of other new features.

We no longer support Koa, Kokua, and Customer Service template versions from before Winter '16 (October 2015).

The impact of updating a template depends on the version your community is using. When a manual template update is available, a red notification icon ( ) appears over the Settings icon.

Important: **We strongly recommend that you test the impact of the update in a sandbox environment. After you update and publish your community, you can't revert to an older version.**

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
Winter '19 Lightning community templates and Lightning Bolt solutions	• Accessibility and performance improvements on the following components: – Navigation Menu – Reputation Leaderboard – Related Records – Trending Articles by Topics If you've applied CSS customizations, migrate them in the upgraded components.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update your template
- Create and Manage Communities

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	Note: Overriding CSS is not recommended. The best way to update the styling of your components is to use the Theme panel in Community Builder. To update existing CSS overrides see CSS mappings for updated components.
Summer '18 Lightning community templates and Lightning Bolt solutions	Your community is updated automatically with all the features of the Winter '19 release. No need to manually update.
Spring '18 Lightning community templates and Lightning Bolt solutions	• Improvements to tooltip positioning by changing several panels, dialogs, and tooltips to use a shared container • Updates to the Language Selector's functionality and appearance (current preferences are maintained) • Improvements to the property editor container • All the changes that apply to subsequent updates • If you've applied CSS customizations, migrate them to the upgraded components Note: Overriding CSS is not recommended. To update existing CSS overrides, see CSS mappings for updated components and Standard Design Tokens for Communities.
Winter '18 Lightning community templates and Lightning Bolt solutions	• A dropdown menu to set audiences at the component level • Out-of-the-box UI enhancements, such as font sizing • Upgraded Reputation Leaderboard, Trending Articles by Topic, and Related Articles. If you've applied CSS customizations, migrate them to the upgraded components. Note: Overriding CSS is not recommended. The best way to update the styling of your components is to use the Theme panel in Community Builder. To update existing CSS overrides see CSS mappings for updated components. • A new User Profile Menu component that automatically replaces the Profile Header component in updated templates • The base component on the Record Detail page for custom objects is replaced with a newer version for desktop view mode. If you currently have CSS overrides for record layout, keep them, and refer to *CSS Overrides Migration for the Record Layout Component* to add your styles and customizations to the new component • A new Theme panel that redesigns the Branding Panel in Community Builder • Additions to Theme settings that help you easily see which pages a theme layout is associated with • More metadata options to improve discoverability of pages through SEO • Query parameters in a community URL, other than language, no longer persist while navigating within a community • Updates to CMS Connect (JSON) require manual updating to connections created with the Winter '18 release. – CMS Connect (JSON) now autocreates detail pages. URL's using query parameters pointing to your manually created pages will continue to work. However, they

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	will not be accessible from the CMS Connect (JSON) Property Editor in Community Builder. Note: For better SEO and management, it is best to use the new, automatically created pages. 1. In Community Workspaces, add a Content Type and the JSON path for both ID and Title. 2. In Community Builder, open the Property Editor of the existing CMS Connect (JSON) component by selecting it. 3. Click **Save** to create and autoconfigure the new detail page. Note: The standard page you created in Winter '18 for navigation will not be automatically deleted. If it's not referred to by any other component, you can manually delete it from the Pages menu. – CMS Connect (JSON) has new, configuration fields. • When editing an existing JSON connection, the Connection Type will be Public by default and Content Type, Title, and ID will be empty. Title and ID will have to be filled before the connection will be able to be saved again. Note: You can have only one Content Item per Type and it is necessary to define a Content Item for navigation support. – If you have multiple Content Lists and a single Content Item in an existing connection, when you edit your CMS Connection a single Content Type will be created in the JSON section with the Content Item and Content Lists assigned to it. – If you have multiple Content Items and Content Lists, when you edit your CMS Connection you will have one Content Type with a single Content Item and all of your Content Lists under it. The remaining Content Items will each be in a separate Content Type. • All the changes that apply to subsequent updates.
Spring '17 and Summer '17 Customer Service, Partner Central, and Lightning Bolt solutions	• Decoupling of the search box from the community header, making it easier to insert your own search experience within a community. Note: The Search page in the Winter '18 version of the Customer Service (Napili) template doesn't include the Headline component out of the box. If your community's Search page includes the Headline component, it's removed as part of the upgrade. • Sleeker header component improves your community's mobile experience, leaving more room to show what's important to your community. • Out-of-the-box UI improvements, such as improved spacing in text fields. • Streamlined new Global Search for Peer-to-Peer Communities.

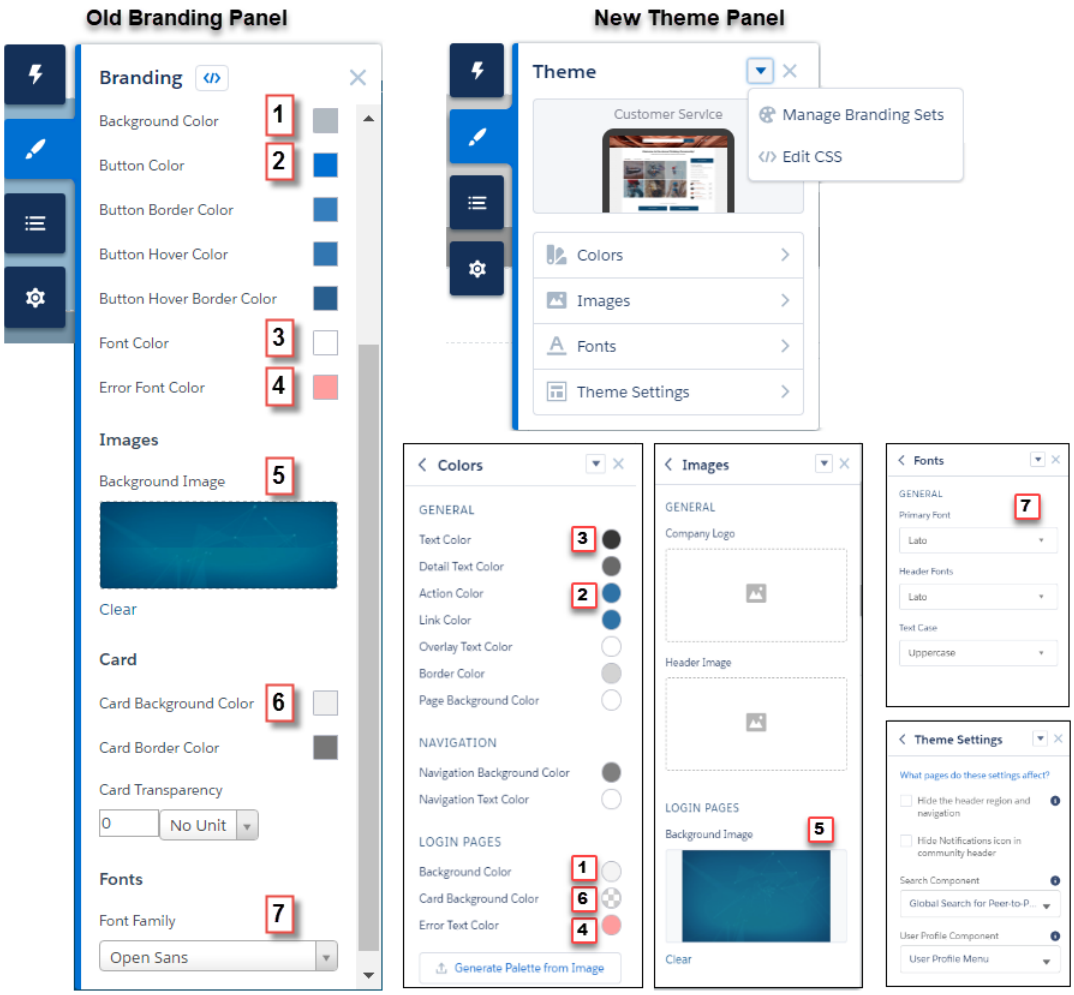
My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	• Upgraded, high-performance navigation menu that offers more styling options and reduces the need for CSS overrides. If you have applied CSS customizations, migrate them to the upgraded navigation menu. Note: Overriding CSS is not recommended. The best way to update the styling of your navigation menu is to use the Theme panel in Community Builder. To update existing CSS overrides see CSS mappings for updated components. • Adoption of Lightning Design System principles in all content layouts. • Two new branding options: Navigation Background Color and Navigation Text Color. • All the changes that apply to subsequent updates.
Winter '16 to Spring '17 Customer Service (Napili)	• Login pages retain branding but lose custom code or component customizations. • All the changes that apply to subsequent updates.
Pre-Winter '16 Koa, Kokua, or Customer Service (Napili)	Most component customizations and properties are overwritten. However: • For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over. • For Customer Service (Napili), topic definitions carry over. • All the changes that apply subsequent updates.
Pre-Spring '16 Aloha template	Most branding properties defined using the Branding Editor in Community Builder are maintained. However, sometimes your community's colors are reset to the default value. After you update the template, check the branding properties and update the ones that were reset
Salesforce Tabs + Visualforce	Template updates for communities using Salesforce Tabs + Visualforce aren't managed from Community Builder.

For information on component compatibility with older template versions, see Which Components Can I Use with Each Template?

To update your template:

1. In Community Builder, click > **Updates**.
2. Click **Update** and confirm the update when prompted.
3. Make sure that your login pages look correct, and reconfigure missing branding properties, custom code, and component customizations.
4. Publish your community to apply the template updates.

If you are upgrading from a pre-Winter '18 template, some of the old branding properties are reorganized but still there, while others map to different properties. Let's take a closer look at the changes.



Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Background Color (1)	Background Color (1)
Button Color (2)	Action Color (2)
Button Border Color	—
Button Hover Color	—
Button Hover Border Color	—
Font Color (3)	Text Color (3)
Error Font Color (4)	Error Font Color (4)
Background Image (5)	Background Image (5)
Card Background Color (6)	Card Background Color (6) Also controls card transparency
Card Border Color	—

Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Card Transparency	—
Font Family (7)	Primary Font (7)

SEE ALSO:

- Community Builder Settings
- Community Builder Overview
- Considerations for Changing Your Community Template

Save a Copy of Your Community's Customizations

To back up most of your community's user interface and CSS customizations before upgrading, export the community from Site.com Studio to your hard drive.

Important: Audience assignments to pages aren't preserved when you export the community. Reassign audiences after you import the community. See Manage Audience Targeting for Pages and Groups in Communities.

The community is exported in a packaged format with a .site extension, which you can reimport into your org to restore customizations if needed. The maximum size you can import is 2 GB.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Pages**. Then click **Go to Site.com Studio**.
3. On the Overview tab in Site.com Studio, click > **Export This Site**.

If the community is

- Smaller than 100 MB, select a location to save the exported .site file on your hard drive and click **Save**.
- Larger than 100 MB, you receive an email when the export process has completed. Click the link in the email to download the exported .site file.

To restore customizations, overwrite your community.

1. From Site.com Studio in your production community, click **Site Actions** > **Overwrite This Site**.
2. Click **Browse** to find the .site file you exported.
3. Click **OK** at the overwrite warning.

   Important: Overwriting a community can't be reversed.

4. Review your changes in Community Builder before publishing.

EDITIONS

Available in: Salesforce Classic

Available for purchase in: **Enterprise**, **Performance**, and **Unlimited** Editions

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

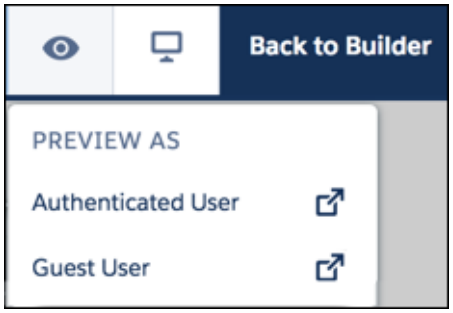
Preview Your Lightning Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices.

Community Builder's preview option lets you see how your community appears when it's live.

- To preview the community in a browser window, click **Preview** on the toolbar.

- In Preview mode, to see the community in its own browser tab as:
  - An logged in customer would see it, click > **Authenticated User**.
  - A visitor would see it, click > **Guest User**. As long your community includes one public page (such as the Home page), you can use the **Guest User** option.



- To preview the community on different devices, use the options in the menu.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

SEE ALSO:

Community Builder Overview

Publish Your Lightning Community Customizations

Publish Your Lightning Community Customizations

Publish your community in Community Builder to make your branding and component customization updates available to everyone in your community.

Tip: Publishing a Lightning community for the first time makes the community URL live and enables login access for community members. Unlike Salesforce Tabs + Visualforce communities, you don't need to activate a Lightning community unless you want to set up SEO and send out a welcome email.

1. In Community Builder, preview your community to make sure that your updates appear as expected.
2. When you're happy with your changes, click **Publish** in the toolbar to publish your changes.

   Important: *All* changes made to a community since the last time it was published are included.

An email notification informs you when your changes go live.

SEE ALSO:

Community Builder Overview

Preview Your Lightning Community with Community Builder

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Manage Your Community's Pages and Their Properties in Community Builder

The Pages menu and Page Properties centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

From the Pages menu (1), you can:

- Search for a page and click ••• (2) to edit its properties (3).
- Create alternative variations of the selected page and set audience criteria-based page visibility (4).
- Create custom pages (5).
- Switch to a different layout on page 408 to change the look of your community's pages (6). If the page has any Page Variations, you can switch layouts for each variation separately. If you don't assign a layout, the default layout is applied.
- If the selected page is not a Template page, you can delete it (7) and all its page variations with a single click.

  You can also delete the selected page, or its variations, from the Page Variations tab (4). Page variations of template pages can be deleted from here as well.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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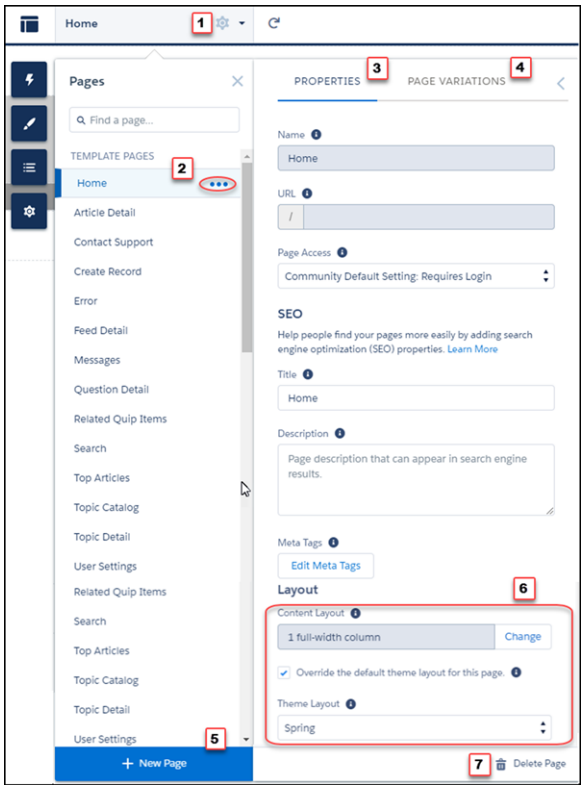
USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



IN THIS SECTION:

Page Properties and Types in Community Builder

Use the Pages menu and Page Properties to view and edit the properties of the various pages that make up your community.

Edit Community Pages and Components in Community Builder

Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Lightning Community template are ready for you to use with little configuration. Add new components to your community's pages, edit the properties of existing components, or delete components that you don't require.

Create Custom Pages with Community Builder

Extend your community template by creating custom pages and adding custom record detail, list, and related list pages to get the most from your Salesforce data.

Add Markup to the Page <head> to Customize Your Community

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Community Builder. For example, you can include SEO meta tags that are visible only to search engines or add a *favicon* or web page icon.

Audience Targeting

Audiences are sets of criteria used to define community member segments. Use them to keep your community members engaged by offering them personalized, relevant content in a customized community.

Update Your Editor

To improve how you edit your page content, we moved HTML editing to a dedicated HTML Editor component.

Use Visualforce in Lightning Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Lightning communities.

Add Streams to Your Community

Your community members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

Page Properties and Types in Community Builder

Use the Pages menu and Page Properties to view and edit the properties of the various pages that make up your community.

EDITIONS

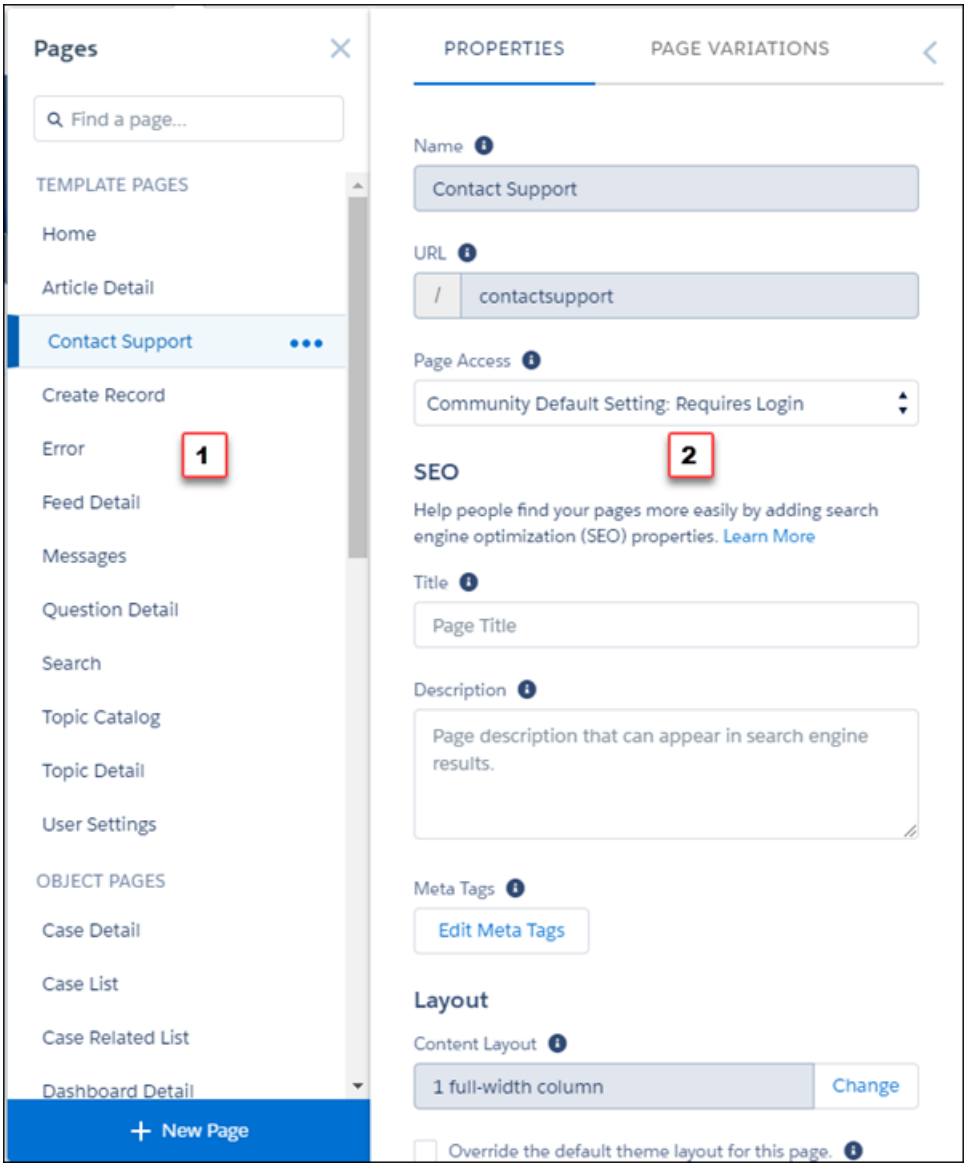
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



Page Types (1)

We've grouped your community's pages by type in Pages menu.

My Pages
The standard pages that you create. (The object pages that you create appear under Objects.)

Template Pages
The default pages that come with the community template.

Objects
The pages of the objects in your community, which include the object's record detail, list, and related list pages.

Generic Record Pages
These generic pages are used to display record information for a Salesforce object when custom object pages don't exist.

Login Pages
The default login pages that come with the community template.

Page Properties (2)

The properties available to each page depend on the page type selected.

Name
The name of the page as it appears in Community Builder. Editable only in the standard pages that you create.

URL
The URL of the page. Editable only in custom standard pages.

Page Access
Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

SEO

Adding tags for static pages in the `<head>` works great, but what about pages that are generated dynamically from a database or ever-changing inventories? We've got you covered so that you don't have to spend your entire day, every day, updating search terms. Using a combination of standard approaches and expressions, SEO management gets a lot easier.

Let's look at the `title` and `description` tags again with the idea of harnessing your Salesforce data to generate pages from records. To make these pages discoverable, you must provide the title and which object it comes from. You can use the following expressions anywhere you see **{ }** next to the name of an input field.

Table 2: Expressions for SEO

Expression	Description
{!Record._Object}	Returns the display name of the object. Output appears in the appropriate language, if available.
{!Record._Title}	Returns the title of the record as defined in the name field. Keep in mind that the name field might have a different label than "Name." Output appears in the appropriate language, if available.
{!Record.*FieldName*}	The value of the specified field for the record. The field name is case-sensitive and includes "__c" for custom fields. You can use this expression only in the SEO component. Output appears in the appropriate language, if available.

Note: Did you notice that the Object and Title expressions look a little different than usual? Use them as they are presented, and they'll work fine. They are unique for this area of Salesforce.

For example, you can display the object name of a record followed by its title: `{!Record._Object}: {!Record._Title}`. Or, add a specific field, such as `{!Record.Description}`.

Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access is enabled in the Community Builder settings so that the Guest User profile has access to the fields displayed.

Custom fields are enabled for the Guest User profile through field-level security (FLS) settings before they can be used in expressions.

If any queried field is restricted (by profile or FLS), the entire record does not load and your expressions do not render on the page. Null field values are returned as empty strings.

Title
The title of the page as it appears in the browser's tab or window title. Used for bookmarking the page and appears in search engine results.

Unavailable for pages in the Template Pages section that set the title dynamically, such as the Article Detail and Topic Detail pages.

By default, detail and list pages in the Objects section set the title dynamically, so although the Title field is available, its value is overridden. However, if you replace the page's default component with a custom Lightning component that doesn't set the page title dynamically, then the title you set here is used.

Description
Used for search engine optimization purposes and appears in search engine results. Available for the Contact Support, Error, Home, and Topic Catalog template pages, and all pages listed under My Pages and Login Pages.

Edit Meta Tags
Provides the opportunity to enter specific <meta> tags for the page to assist search engine optimization for your Community. In addition to standard HTML meta tags, you can enter expressions to access values from the record associated with this page, such as the name, title, and value of specific fields.

Content Layout
Defines the content regions of your page, such as a two-column layout.

Theme Layout
By selecting **Override the default theme layout for this page**, you can choose to apply a different theme layout for the page.

SEE ALSO:

Change the Theme Layout of Your Community's Pages

Change the Content Layout in Community Builder

Set Up SEO for Your Community

Lightning Communities Developer Guide: Create Custom Content Layout Components for Communities

Edit Community Pages and Components in Community Builder

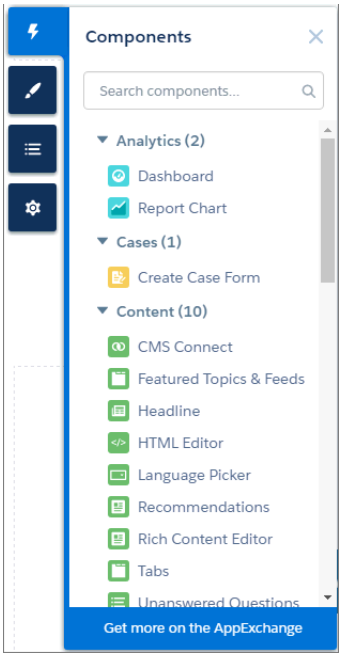
Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Lightning Community template are ready for you to use with little configuration. Add new components to your community's pages, edit the properties of existing components, or delete components that you don't require.

Tip: If you plan to add components to a new custom page, spend some time planning the composition of the page based on its purpose.

USER PERMISSIONS

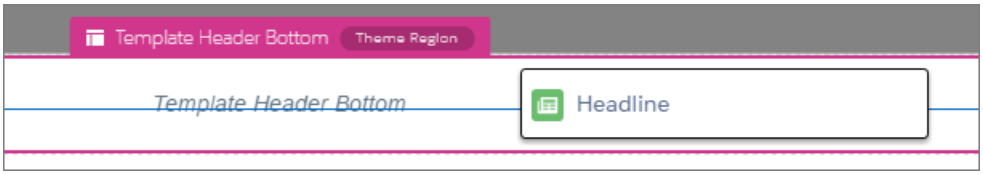
To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

1. From the Pages menu in the top toolbar, select the page that you want to edit.
2. Click to open the Components panel.



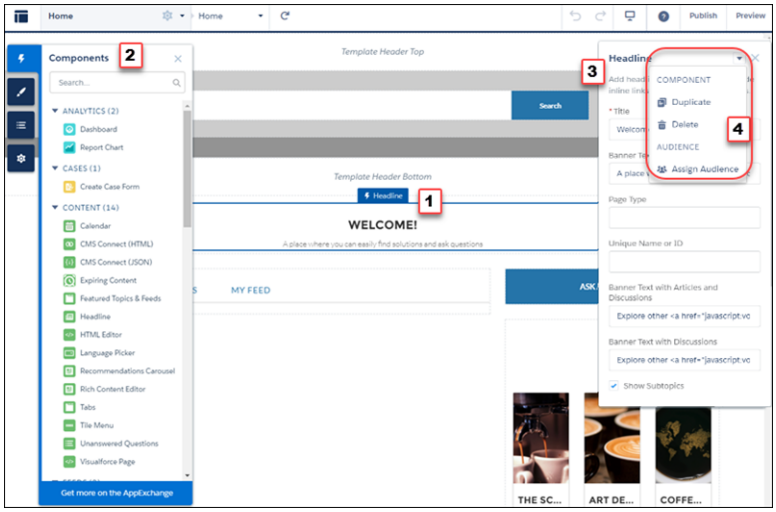
The Components panel lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

3. Drag the required component from the Components panel onto an editable area of the page.
When you drag a component over a content or theme layout region, a label appears to help you identify the region. Components in theme layout regions are shared everywhere that theme layout region is used and we add the label "Shared" to the component name. Components in a content layout region are specific to the page.



4. To edit the properties for a component on the page, select it on the main page canvas or on the Page Structure panel.
When you select a component, Community Builder highlights the component with a blue border and displays the component's properties in the floating property editor.
5. Update the component as required.

Example: Here's a sample configuration of the Headline component (1) on the Home page with the list of supported Lightning components (2) and properties (3). You can also quickly duplicate, delete, or assign an audience to the component to control its visibility (4).



Tip:

- You can browse a selection of custom Lightning components on the AppExchange and add them to your org directly from Community Builder. Click **Get more on the AppExchange** in the Pages menu. Components that are ready to add to your community's Lightning pages are displayed. When you add a component, it appears in the Components panel of all the template-based communities in your org.
- You can also create custom Lightning components and use them on community pages. For more information on creating custom Lightning components and enabling them for Community Builder, see the *Lightning Communities Developer Guide*.

IN THIS SECTION:

Error Messages for Pages Without Data in Community Builder
When you build a template-based community page using Lightning components in Community Builder, sometimes a page doesn't load correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

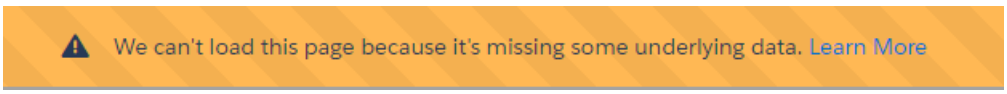
Error Messages for Pages Without Data in Community Builder

When you build a template-based community page using Lightning components in Community Builder, sometimes a page doesn't load correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

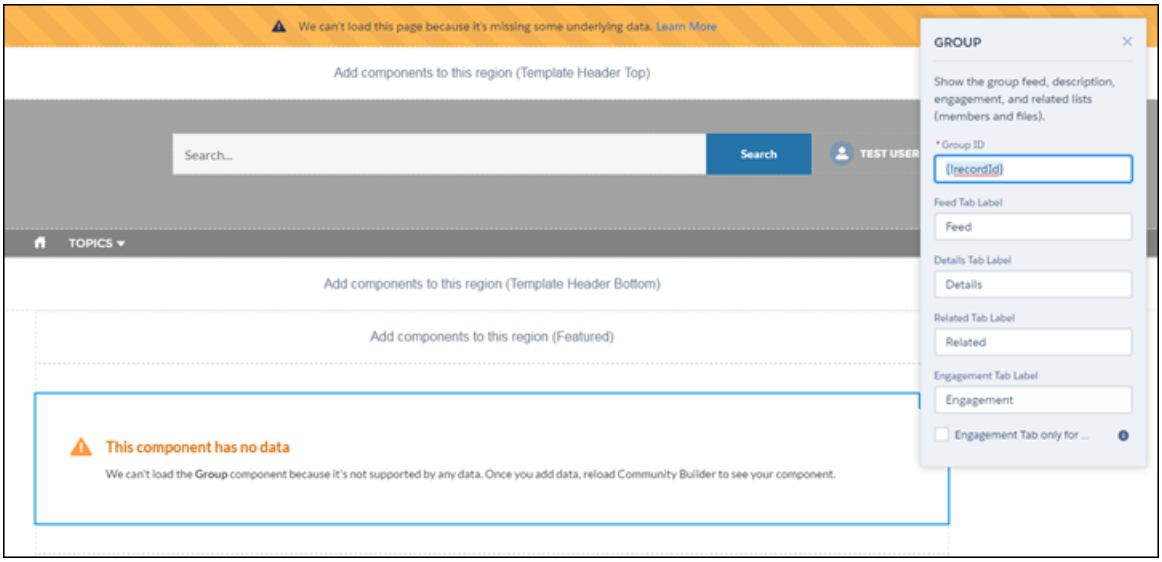
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



An error occurs on community pages in one of the following three instances:

- The page does not have any components
- The page has one or more components, and one or more do not have any underlying data

You see this error when components rely on dynamic data, and they don't find any underlying data to draw upon. For example, a Group component that doesn't find a group ID, or a record that can't find a record ID, would both give you an error.



Why do I see this error?

In most situations, the page is trying to draw information where information doesn't exist. For example, let's say you make a record detail page for the Account object. If you don't have any accounts set up in Salesforce, you see an error. Or let's say you set up a group detail page, but your new community doesn't have any groups. Once again, you see an error.

Any gotchas?

The Customer Service template uses topics to organize content in a community. To see topic detail pages, first set up Navigational Topics in Community Management.

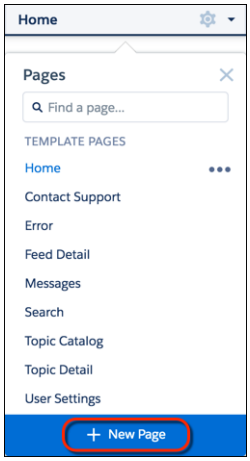
The following default pages in the Customer Service template can show this error. Here are some tips on how to fix it.

- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Topic Detail: Create a Navigational Topic.
- Question Detail: Create a Navigational Topic. Use the Ask a Question button to create a question.
- Feed Detail: Use the Post Publisher or Ask a Question button to create a post or question.
- Group Detail: Create a group in the community.

Create Custom Pages with Community Builder

Extend your community template by creating custom pages and adding custom record detail, list, and related list pages to get the most from your Salesforce data.

1. In Community Builder, open the Pages menu on the top toolbar.
2. Click **New Page** at the bottom of the Pages menu.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

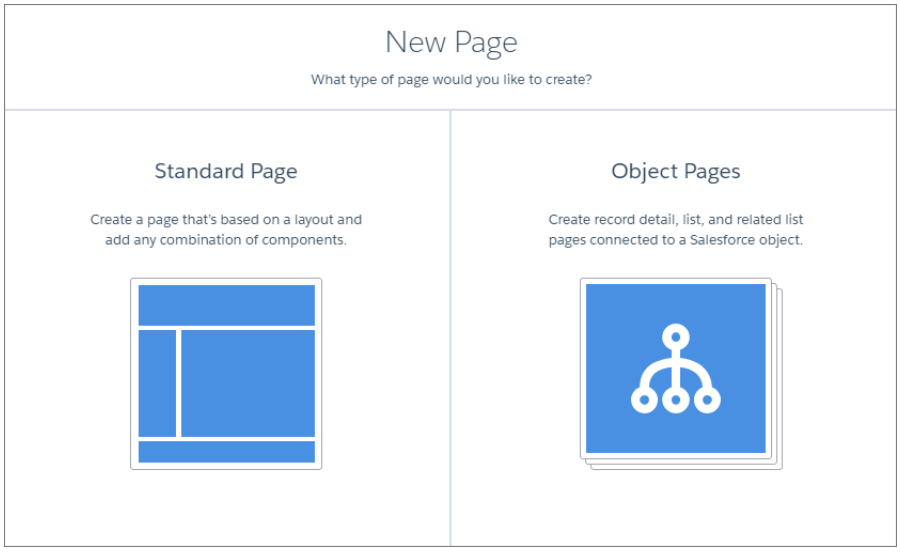
To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

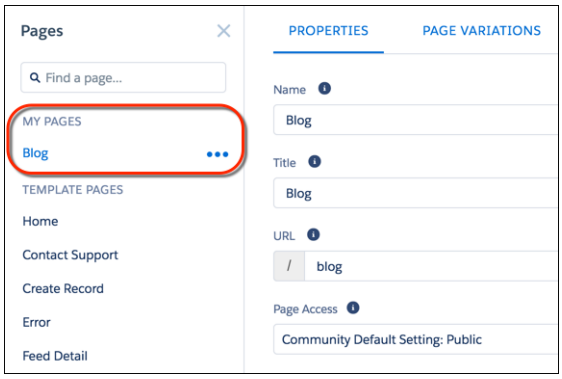
3. To create:
   - A standard page that's based on a blank layout or a preconfigured page (if available), click **Standard Page**.

     If you don't have preconfigured pages, choose a blank layout. Alternatively, if you do have preconfigured pages (because you've exported or imported custom pages), choose one to customize or click **New Blank Page** to select a blank layout.

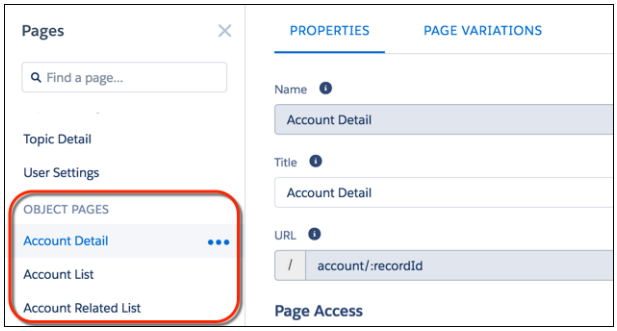
     Click **Next**, give the page a unique name, and specify the static portion of the page's URL.
   - A detail, a list, and a related list page associated with one of your Salesforce objects, click **Object Pages** (in Customer Service only). Select the object that you want to associate with the page.



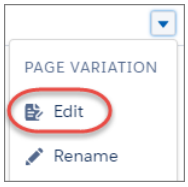
4. Click **Create**.
   Custom standard pages that are based on a layout appear under My Pages in the Pages menu. Pages that are based on a default template page appear under its Page Variations section.



   Custom object pages appear under Object Pages.



5. Open a standard page by selecting it, or open an object page by clicking > **Edit** in the Page Variations section.



6. Add and configure page components.
7. If you're using the Customer Service template, set the page's visibility.
8. Preview and publish your community when you're done.

Tip:

- In Page Properties, you can quickly create alternative versions of the page in the Page Variations tab. For example, you could create three different Question Detail pages to test out various layouts or styles, or to assign them to different audiences. To create a page variation, click **New Page Variation** in the Page Variations tab.

  You can also duplicate a page variation by clicking > **Duplicate**.

- Use the Navigation Menu component to create custom navigation nodes for new pages.

IN THIS SECTION:

Delete a Page in Community Builder
Remove a community page or page variation that you no longer need by deleting it in Page Properties.

Delete a Page in Community Builder

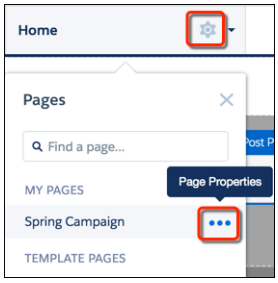
Remove a community page or page variation that you no longer need by deleting it in Page Properties.

Keep in mind that you can't delete:

- The default pages and objects that come with the template
- A page's default page variation
- A custom object page (detail, list, or related list) but you can delete the entire object

To delete a page or page variation:

1. In Community Builder, open the Pages menu.
2. Open Page Properties for the page that you want to delete. Click ⚙ beside the page on the top toolbar, or click ••• beside the page in the Pages dropdown menu.



3. To delete the page or a page variation (if available), click ▾ **(1)** on the page variation row and select **Delete** (2). Confirm your delete request in the **Delete this page variation?** dialog to complete the task.

EDITIONS

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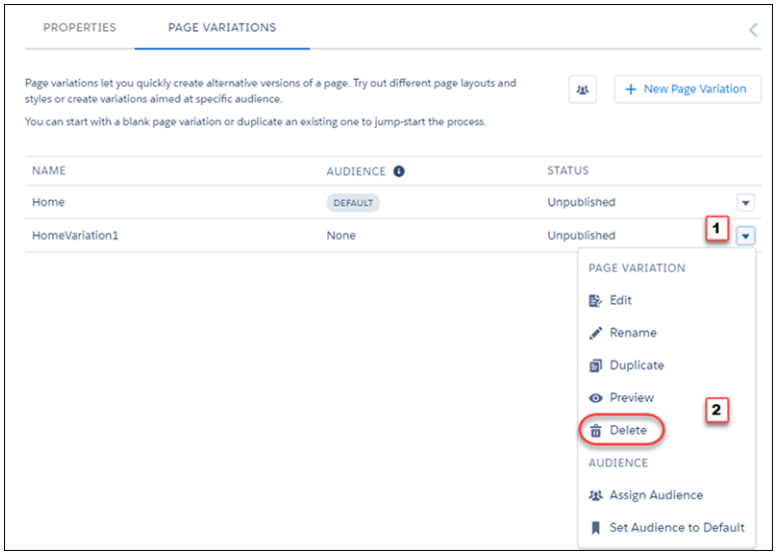
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



Add Markup to the Page `<head>` to Customize Your Community

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Community Builder. For example, you can include SEO meta tags that are visible only to search engines or add a *favicon* or web page icon.

For security purposes, we restrict the tags, attributes, and values allowed in the `head` markup of your pages.

Important: If you've selected **Strict CSP** as your Script Level Security on page 159, some of your existing head markup may not work correctly. Test your markup in your sandbox or DE orgs first before activating in live orgs in a future release.

Allowed Tags	Allowed Attributes
<base>	href, target
<link>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel,[1] relList, rev, sheet, sizes, target, title, type [1] For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, canonical, external, help, icon, license, manifest, mask-icon, next, nofollow, noopener, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag.
<meta>	charset, content, http-equiv,[2] name, property, scheme [2] For http-equiv, allowed values are cleartype, content-type, content-language, and default-style. **Note:** The attribute `http-equiv="X-UA-Compatible"` is only

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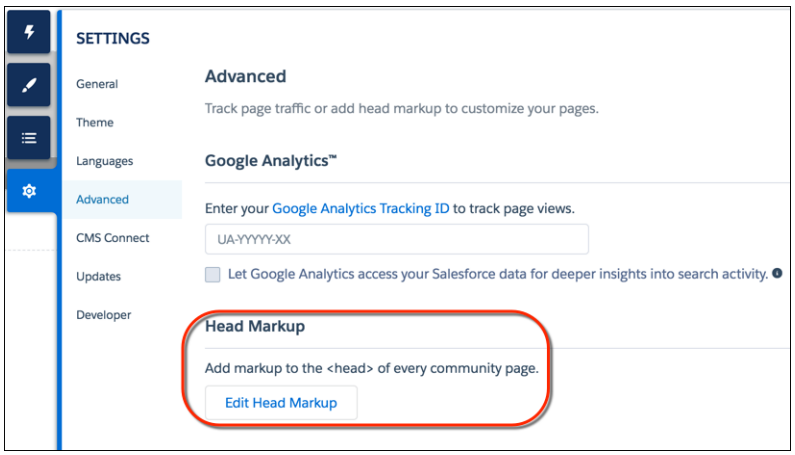
Allowed Tags	Allowed Attributes
	supported in combination with `content="IE=Edge"`.
<script>	
<noscript>	Within <noscript> only the following elements are supported: <img>, <a><img>, <iframe>
<title>	None allowed

Note: If the code in your `<head>` tag is invalid, you will not be able to save your work. If you have entered unsupported code, you can hover over to see details on the issues.

Existing `head` components that contain invalid markup will be stripped from the page before it is rendered. To get the `head` working again, use Community Builder to edit out the unsupported tags.

1. In Community Builder, click on the left sidebar and click **Advanced**.



2. Click **Edit Head Markup**.
3. Enter the required HTML.
4. Save your changes.

When you add custom markup, the code is added to the `<head>` of every page in your community, including login pages.

Example: Here we've added HTML to include a favicon on our community's pages.

Audience Targeting

Audiences are sets of criteria used to define community member segments. Use them to keep your community members engaged by offering them personalized, relevant content in a customized community.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

Say that a company offers a product that is called by different names in different regions. Rather than creating different communities, the community manager could simply create different experiences of the same community. Using Builder, the community manager can apply sets of criteria to pages, components, or branding sets and what members see varies depending on their location. And that's just one type of criteria. Here's all of them.

- Profile
- Location
- Domain
- User Object
- Record Type
- Permission

Profile lets you choose members who fit a specific profile as you've defined it in your org. Location, determined by the members' IP addresses, selects members who are in specific area, like a state or country. Domain chooses members based on how they come into your community. For example, coffee.awsimporters.com and tea.awsimporters.com. Record type selects members who match a particular record type, like group.

User object is a bit different and offers the ability to use CRM fields as audience criteria. This option gives you the power to use customer information to create very specific criteria, such as which department a member is part of or what company they work for.

Apply the criteria you create to entire pages, individual components, or branding sets for different effects. Applying audience criteria to page variations means that members see, for example, different home pages. Applying criteria to a component means that everyone sees the same page, but what's on the page can be different. Applying criteria to branding sets lets you display the same content but with entirely different looks and feels.

You can also apply multiple criteria and finely tune your member segment targeting, but most likely some members fit in more than one criteria. To get the target group you want, set the order criteria are applied. Choose which branding set or page takes precedence by dragging and dropping them into the order you want.

One other aspect to consider when using multiple criteria is the effects of layering. For example, you have a California audience assigned to a page. On that page, you assign a component to a company. The effect is that only members who work for that company in California can see the component.

A note about page visibility: Aside from Audiences, you control who sees a page by setting its visibility. After you create the page variations you need in Page Manager, choose from three visibility options that, when combined with a page's published status, determine whether a page is visible to your community members.

Default: All users unless set by profile
When the page is published, it's visible to all valid community members, except members whose profiles are assigned to a different page variation. Each page must have one default page variation.

By Profile
When the page is published, it's visible only to users with the selected profiles.

None
Even if the page is published, it's not visible to users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Considerations for Using Criteria-Based Audiences
Criteria-Based Audiences are a great way to target specific members of your community with the right content. As you work with them, though, there are some things to consider.

Manage Audience Targeting for Pages and Groups in Communities
Combine audience criteria to control which page is visible to your community members, creating a custom experience and even custom groups.

Target Audiences Using CRM Fields
Starting with the User criteria, select your way to the CRM field you want to use to create audience criteria.

Custom Audience Formulas
With custom formulas, you can create complex, specific audiences by grouping criteria and applying AND and OR statements.

Assign Audiences to Components
Assign audiences to community page components and further refine your audience targeting.

Considerations for Using Criteria-Based Audiences

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Criteria-Based Audiences are a great way to target specific members of your community with the right content. As you work with them, though, there are some things to consider.

General considerations:

- You can change the priority of your criteria by dragging and dropping them into the order you want.
- Layering audiences can be tricky. For example, if you have a San Francisco audience assigned to a page variation, all your members in San Francisco can see the page. If you add company name audience criteria to a component on the page, that component is visible only to members in San Francisco who also work for that company. On the other hand, if you assign a California audience to the component, no one outside of San Francisco sees it because the entire page is already assigned to the more specific San Francisco audience.

Performance considerations:

- Keep your location criteria broad. If the location is unlikely to have much traffic, try using a larger geographic area. For example, instead of a city, use a state or even country.
- To increase the traffic to your page, combine audiences. Instead of having multiple audiences that differ only by the city, combine them into one and add each city to the location criteria.
- Limit audiences to significant differences. If there are minimal differences in pages, such as content of a component, use actions to dynamically vary the component content instead.

Location criteria considerations:

- Location is the user's IP location, which could potentially be located in a neighboring area.
- The location permission is not on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Use of Google API is not permitted in some countries. Location criteria don't work for those areas.

Domain criteria considerations:

- Available domains are created in Salesforce Setup and associated with a community, using a custom URL.
- Domain criteria are not available in sandbox or Developer Edition orgs.

Record Type criteria considerations:

- Record Type criteria can only use the equals and not equals operators.

Audiences based on CRM fields considerations:

- You can't assign Record Type criteria to a component.
- You can't assign audiences to the components in the template header and footer sections.

Manage Audience Targeting for Pages and Groups in Communities

Combine audience criteria to control which page is visible to your community members, creating a custom experience and even custom groups.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

To assign audience criteria to a page variation. See Audience Targeting for details and considerations when using audience criteria.

1. In Page Manager, select the page you want to edit.

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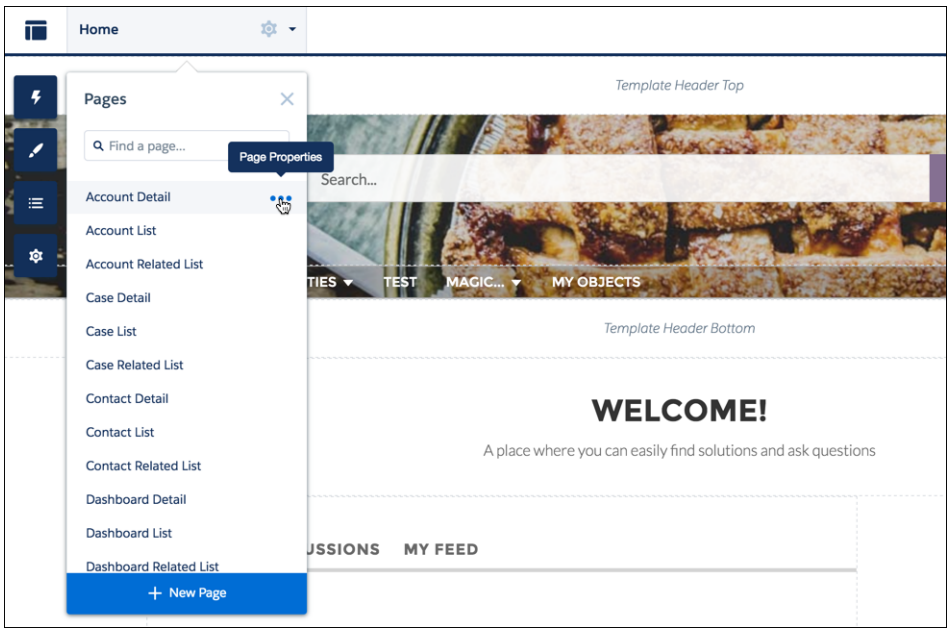


2. Hover over the page name to bring up the ellipsis.
3. Click on the ellipsis to bring up the page options.

4. Open the Page Variations tab.
5. Under **Actions**, click > **Manage Audience**.
6. Select the criteria that you want for your audience.
7. To update the visibility settings of:
   - An unpublished page, click **Save**. The visibility changes don't go live until you publish your community.
   - A published page variation, click **Publish Visibility Changes**. The visibility changes go live immediately, but any other pending changes must be published separately.

To set the visibility of a page variation to Default, click > **Set Visibility to Default**.

To set the visibility of a page variation to None, remove any assigned profiles or set the visibility of another variation to Default, as appropriate.

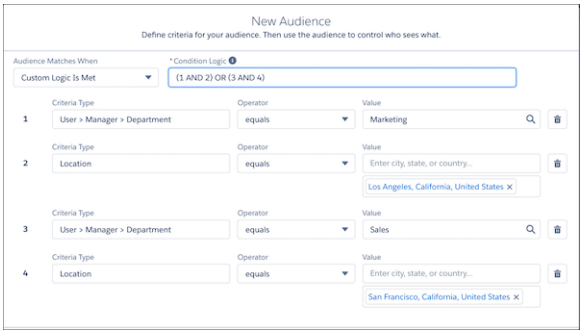
Target Audiences Using CRM Fields

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Starting with the User criteria, select your way to the CRM field you want to use to create audience criteria.

By selecting the fields on CRM objects, you can create highly targeted audience criteria. Say that your organization has an employee community. You could set it up so that different pages appear to different departments and even roles within those departments.



Custom Audience Formulas

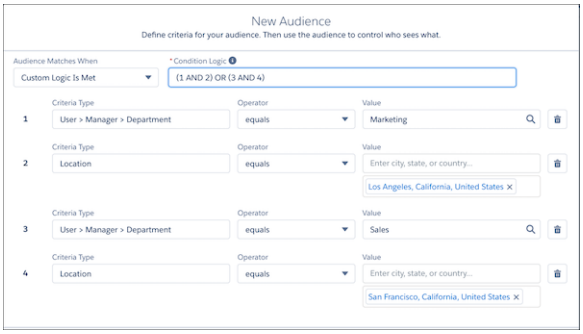
EDITIONS

Available in: **Essentials**, **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

With custom formulas, you can create complex, specific audiences by grouping criteria and applying AND and OR statements.

Grouping criteria and applying operators gives you much more flexibility when creating an audience. Say, for example, you want to target content to both marketing managers based in the Los Angeles area and to the sales managers based in San Francisco. You can do this in one audience by creating user and location criteria, grouping them using parentheses, and applying the AND and OR operators.

Let's take a closer look. In this case, you select Custom Logic Is Met, and add criteria for Los Angeles, San Francisco, Sales, and Marketing. Then, in the Condition Logic, you group the criteria using parentheses, pairing the role and location with an AND operator and separating the groups with OR.

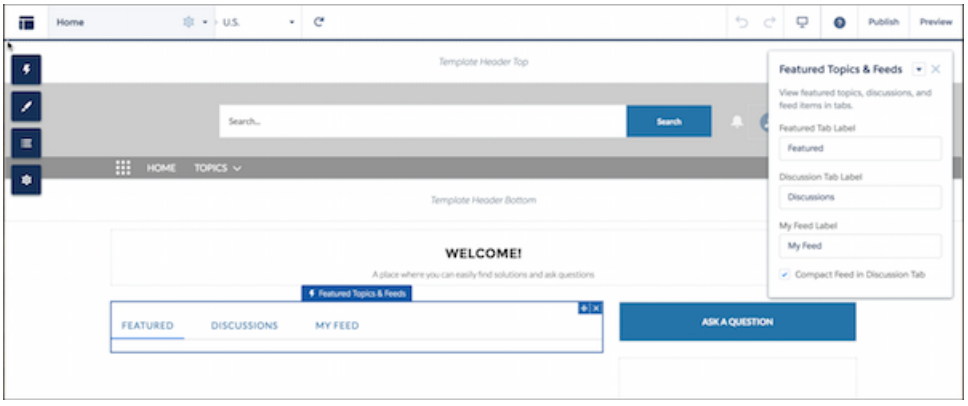


Assign Audiences to Components

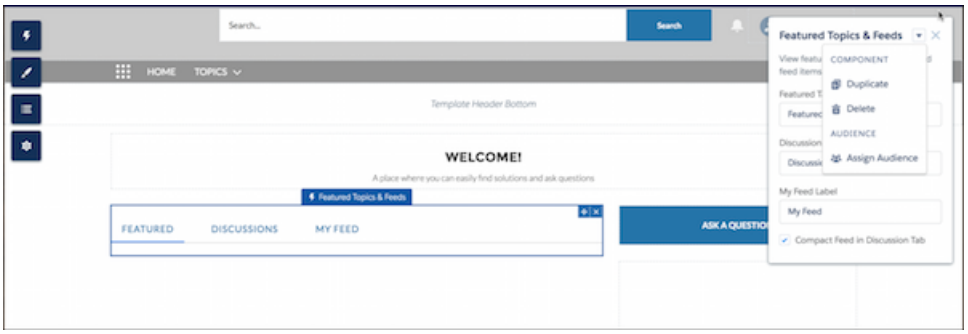
Assign audiences to community page components and further refine your audience targeting.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

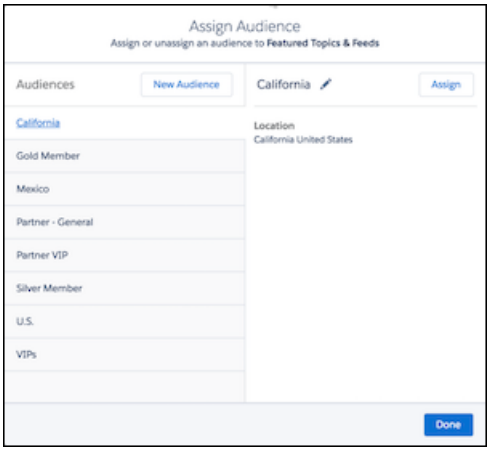
For example, you have a page that's assigned to customers in the U.S., but you want different topics and feeds to appear for customers in California. Go to the page in Builder, and click the component. The blue outline indicates it doesn't have an audience assigned to it yet.



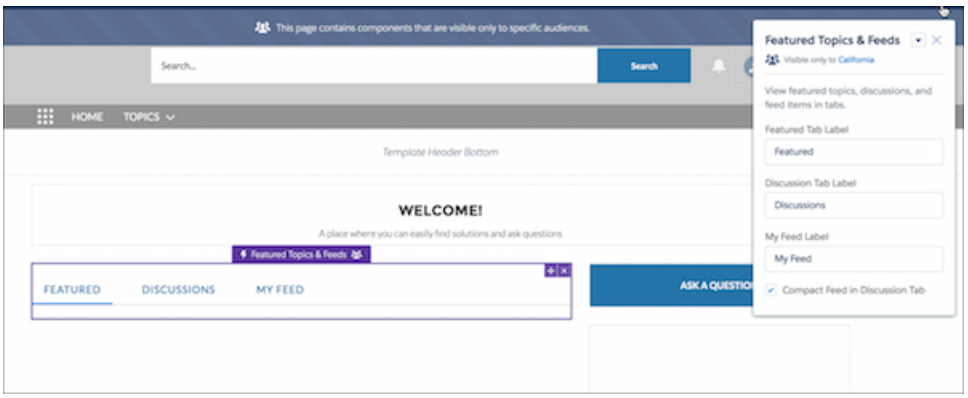
Click the arrow next to the component name, and select **Assign Audience**.



Choose California from the list of audiences, click **Assign**, and then click **Done**.



Notice that the header component's outline is now purple and the audience icon appears next to the name to indicate it has an assigned audience. A note at the top of the page letting you know that at least one component has a specific audience. The component details lists the audience.



Note: A couple things to keep in mind:

- You can't assign Record Type criteria to a component.
- You can't assign audiences to the components in the template header and footer sections.

Update Your Editor

To improve how you edit your page content, we moved HTML editing to a dedicated HTML Editor component.

There's no need to upgrade your existing Rich Content Editor components unless you want to edit the content. In that case, we prompt you to move the content to the appropriate new editor, either Rich Content or HTML. We position the new editor right below the original so it's easy to compare and adjust your content. When you're sure it looks good in the new editor, delete the old Rich Content Editor component.

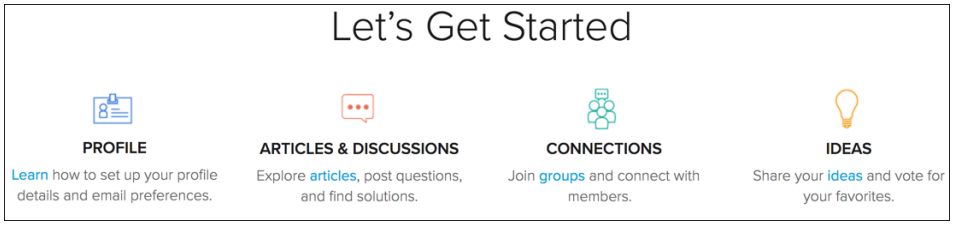
Not sure which editor to choose? Try both! Compare the moved content to the original content in Preview and then delete the components you don't need. Your changes are not live until you publish your community.

1. Click any existing rich content editor on your page.
2. Choose an editor.

   To create and edit simple rich content and quickly add links, images, and videos, use the updated Rich Content Editor component. No need to edit the HTML directly. There are new tools to underline and add background color to text. If you prefer more formatting control and are comfortable working with HTML, use the HTML Editor component instead.

   Did you work with source code in the original Rich Content Editor component? If so, you probably want to move to the dedicated HTML Editor component. The moved content is more likely to display exactly like your original content.
3. Check your content in the new editor. When you're happy that everything looks correct in the new component, delete the old one.

Example: If you use multiple inline images and want control over alignment and text formatting, use the HTML Editor component.



For neatly centered text and video, use the Rich Content Editor component.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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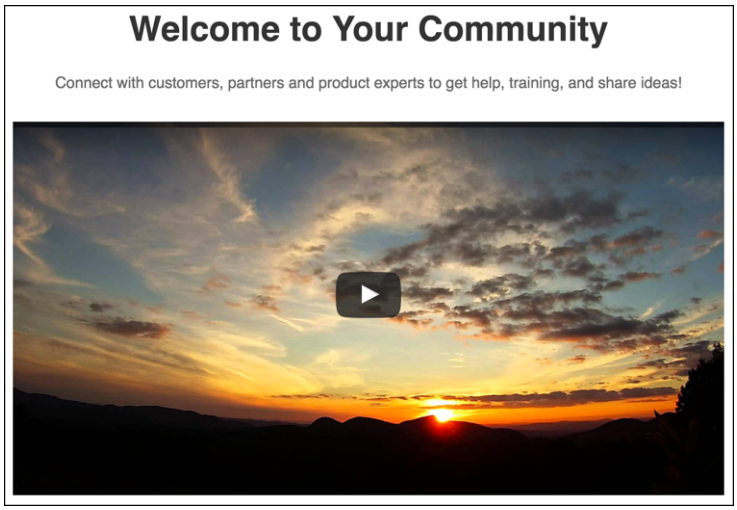
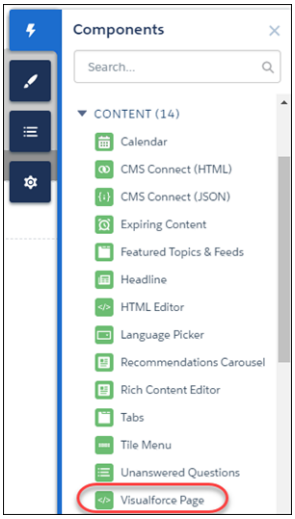


Use Visualforce in Lightning Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Lightning communities.

Note: To include a Visualforce page on a community page, use the Visualforce Page component in Community Builder.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

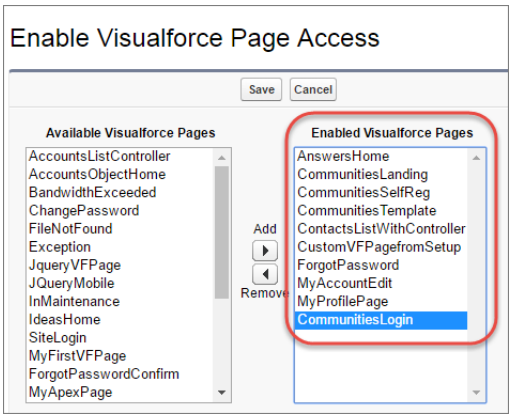
For example, say that you have the Salesforce CPQ app installed in your org. You can create a quote detail page and use the Visualforce Page component to display the quote line editor or other pages. If you have configured actions, buttons, and links, associated with standard or custom objects, they work in communities as well. And canvas app overlays let you host third-party applications in your community.

1. Give Visualforce page access to users by profile.
   a. From Setup, enter `Profiles` in the Quick Find box, then select Profiles.
   b. Click the name of the profile you want to modify.

c. On the Profile page, click **Enabled Visualforce Page Access**.

d. In the **Enabled Visualforce Page Access** section of the Profile page, click **Edit**.

e. In the Available Visualforce Pages list, select the Visualforce pages that you want to make available to this profile and then click **Add**.



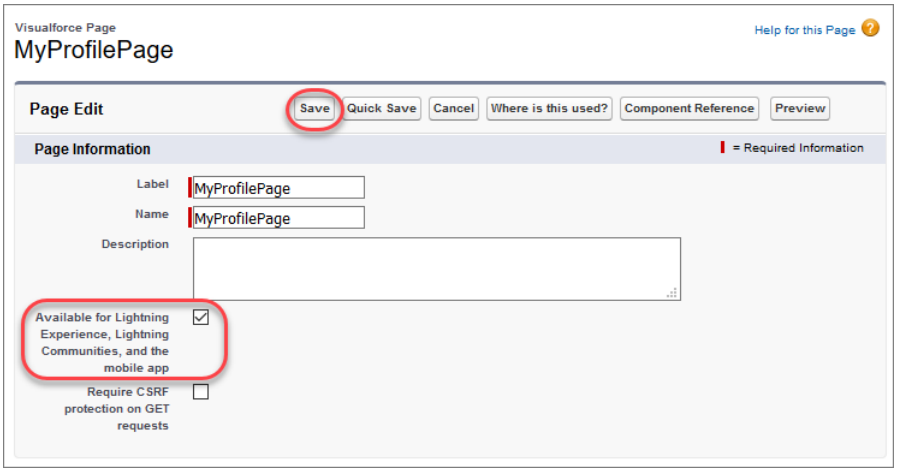
f. Click **Save**.

2. Make the Visualforce page available for your community.

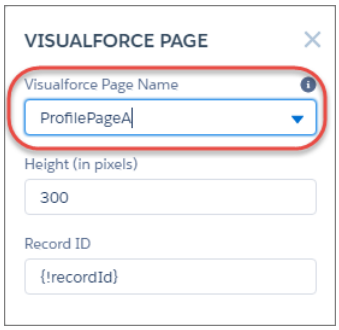
a. From Setup, enter *Visualforce Pages* in the Quick Find box, then select **Visualforce Pages**.

b. Click **Edit** for the page you want to make available for your community.

c. Select **Available for Lightning Experience, Lightning Communities, and the mobile app** and click **Save**.

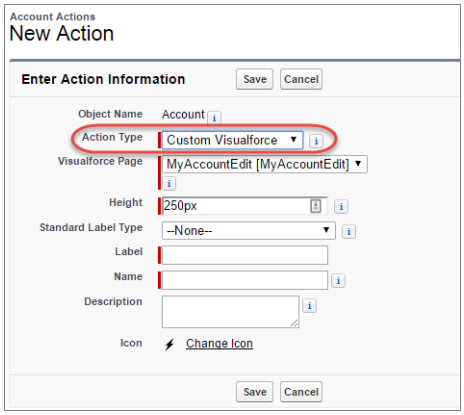


Visualforce Page Component—To add a Visualforce page to your Customer Service community, drag and drop the Visualforce Page Component from the Components panel to the page. Select the Visualforce page you want to use in the property editor.



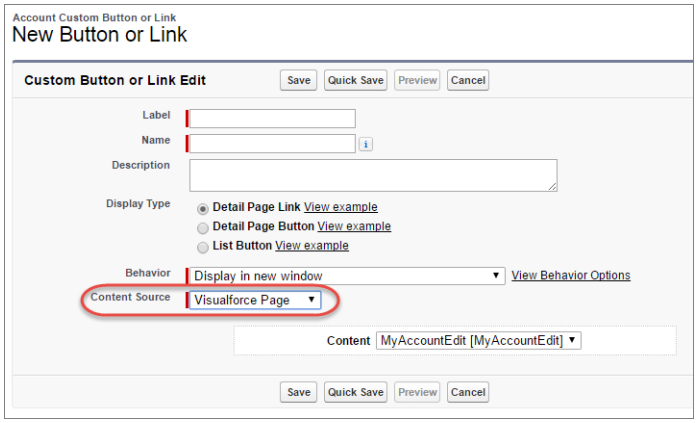
Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag and drop the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

Custom Actions—If you have custom actions with an action type of **Custom Visualforce** associated with a Visualforce page, these actions work in published communities. When users click the action button, the associated Visualforce page displays.



Important: Overrides to standard Visualforce actions such as View, New, Edit, and Delete are not supported in communities. These buttons on record detail pages don't display in communities.

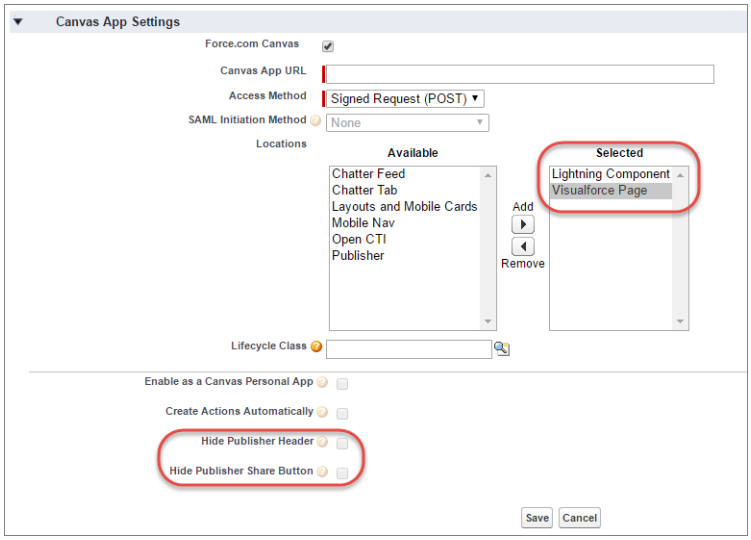
Custom Buttons and Links—If you have custom buttons and links with a content source of Visualforce Page, these buttons and links work in published communities. When users click the button or link, the associated Visualforce page displays.



Note: The Behavior setting for custom buttons and links is not supported. When users click custom buttons in published communities, the Visualforce page is always displayed in the current window.

Visualforce custom list buttons are not supported in communities.

Canvas Apps—You can use canvas apps as custom actions to give users access to the functionality of your apps in communities. Configure your canvas app for Lightning Component and Visualforce Page in Canvas App Settings. You can then load the canvas app inside a Visualforce page, Visualforce action, and Lightning components in published communities.



Note: Canvas quick actions are not available for guest users.

You can opt to hide the publisher header and publisher Share button in Canvas App Settings.

Best Practices for Using Visualforce in Communities

- **Community Branding**—When developing your Visualforce page code, set the `showHeader` attribute to `true`. That way, branding properties you set in **Administration** > **Branding** in Community Workspaces or Community Management also apply to the Visualforce page component in your Customer Service community. To modify the default gray background for Visualforce components, change the **Header Background** property on the Branding page.
- **Mobile**—To enable Visualforce pages to display community branding on mobile, set `standardStylesheets=true` or `showHeader=true` in your Visualforce page code.
- **URLs**—If your Visualforce page contains links to other Visualforce pages, ensure that the Visualforce markup includes `http://` or `https://` at the start of the URL. Also, if your page is locked in a frame, use the `target="_top"` attribute to open the page in the full body of the window. For example,

  ```
  <a href="https://yourVFpageURL.com" target="_top" >Name of Visualforce Page</a>
  ```

- **JavaScript Sources**—Use JavaScript sources such as `connection.js`, `apex.js`, `debugshell.js`, and `util.js` in Visualforce pages in either of the following ways:

  ```
  <apex:includeScript value="/soap/ajax/36.0/connection.js"/>
  ```

  or

  ```
  loadScript("/soap/ajax/36.0/connection.js")
  ```

- **Images**—Hard-coded image URLs in Visualforce pages are not supported in Community Builder preview. We recommend that you upload images as static resources as follows:

```
<img alt="{{msg.severity}}" class="msgIcon" src="{!$Resource.spacerImage}"
title="{{msg.severity}}"/>
```

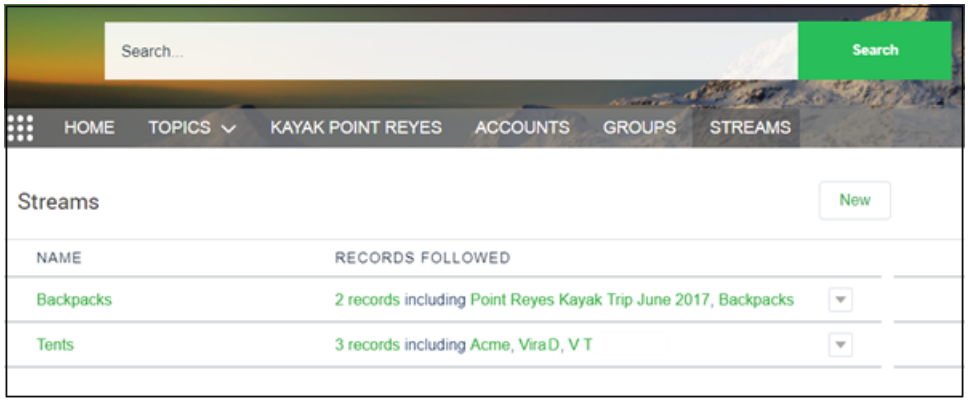
Add Streams to Your Community

Your community members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

In the Community Builder, add the Stream List page to navigation, and you're done.

1. In your community, open the Community Builder.
2. Click the navigation bar, and then click **Navigation Menu**.
3. Click **Add Menu Item**.
4. In the Menu Item panel, enter a name for the Stream List page, for example, *STREAMS*.
5. For **Type**, select *Community Page*.
6. For **Page**, select *Stream List*.
7. Choose whether to make the Stream List page publicly available.
8. Click **Publish**, and then click **Publish** again.
9. In the banner, click **Publish**, and then, in the confirmation dialog, click **Publish** again.

   Community members have access to tools for creating and viewing their own streams.



Share More Salesforce Object Data in Your Community

The Customer Service template allows you to share record data for accounts, cases, contacts, tasks, events, and custom objects with minimal configuration. Record data respects user permissions via licenses, profiles, permission sets, and sharing rules.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

- Create a list of records and link to it.
- Display record details in your community with the out-of-the-box Record Detail page or create a custom page.

  You can also add groups to your community in the same way.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Share a List of Records in Your Community

Create record list views for accounts, cases, contacts, and custom objects and link to them from the Customer Service template navigation menu. Use an out-of-the-box or custom page layout to display the list of records.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

1. In Community Builder, drag the Navigation Menu component to add it to the appropriate page in the template. We recommend adding it to the Home page.
2. Create a navigation menu item pointing to a supported Salesforce object. Currently, the Customer Service template supports accounts, cases, contacts, and custom objects.

EDITIONS

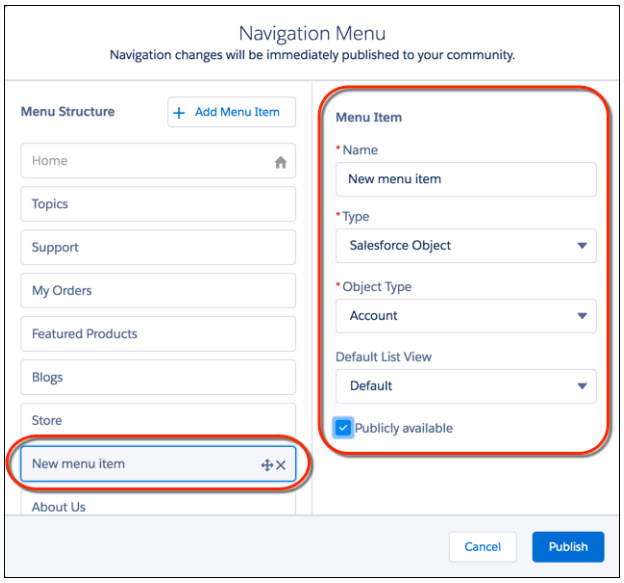
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



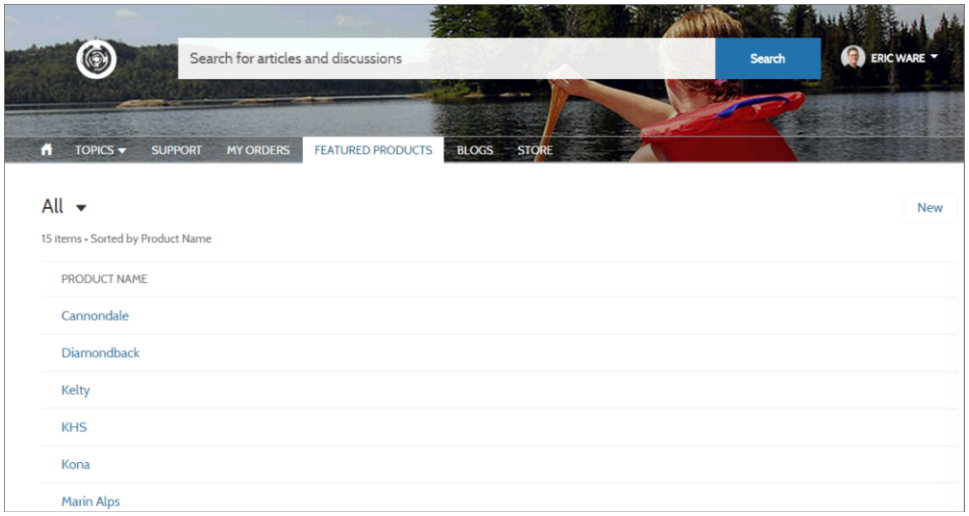
3. Publish your changes.

   Note: If your community is active, your navigation menu item changes immediately appear to your community members.

That's it! This creates a navigation menu item, which links to a list of the selected object's records. Under the hood, your data is retrieved from Salesforce and displayed using the generic Record List page. This page is available out-of-the-box in the Customer Service template and uses the Record Home List View Lightning component to display data in an appropriate layout.

Note: The generic Record List page provides the default list view layout for objects that don't have a predefined or custom list view page assigned. For example, if you create a navigation menu item for another Salesforce object, it uses this same page. If you modify the Record List page, be sure to account for all the affected objects.

Example: A list view page for a custom object called Featured Products.



- Creating a navigation menu item is the easiest way to link to a list of records for an object. If you prefer to use a custom list view page for an object, create a new page for your community using Community Builder. Choose the Standard page type with a

single-column layout. Add the Record Home List View component to the page, configure the component properties to point to the object, and then publish the page. To link to the page, create a custom navigation menu item and use the internal page URL.

- Users can access only records they have access to via licenses, profiles, permissions, and sharing rules, same as in Salesforce. Users with the "Create" permission for the object can create records from the list view page. The ability to create records from this page isn't supported on mobile devices.
- You can hide a navigation menu item from guest users to block access to the associated record list view page.
- When users click a record on this page, the record details are displayed using the layout from the generic Record Detail page. If you create a custom record detail page and assign it to the object, we use that page instead.
- Clicking a record in the list view displays the record details, which are displayed using the Record Detail page in the Customer Service template.

SEE ALSO:

Navigation Menu

Record List

Display Record Details in Your Community

Display record details using the generic Record Detail page or create custom record detail pages.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

The Customer Service template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (with a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Headline and Record Information Lightning components to display record data.

- **Record Headline**: Displays the record name and key record highlights along with buttons to edit and delete the record.
- **Record Information**: Displays all record details including related records and the record feed. It also allows users to create new related records and post to the record feed.

Optionally, you can create custom record detail pages for accounts, contacts, cases, tasks, events, and custom objects.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

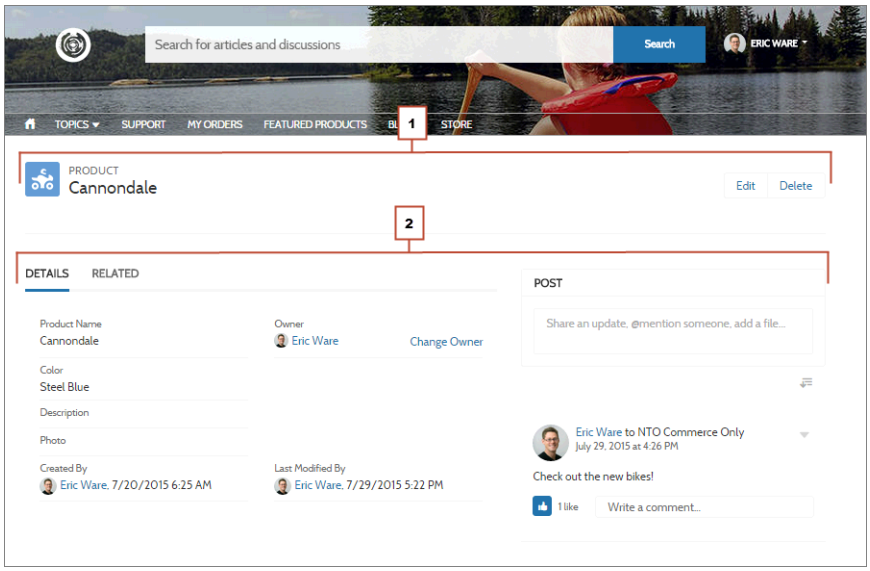
To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

1. Create a new Data Detail page in Community Builder and pick a supported object.
2. Add the Record Headline and Record Information components to the page and configure the component properties in the property panel.
3. Publish your changes.

Note: If your community is active, your navigation menu item changes immediately appear to your community members.

Example: The record detail page for a custom object with the Record Headline (1) and Record Information (2) components.



- Users accessing the community on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed. However, edit inline, available on desktop, will not function in mobile or tablet display.
- Some objects have preassigned record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Community Builder in Page Properties.
- Objects without preassigned record detail pages use the generic Record Detail page. If you modify the Record Detail page layout or configuration, be sure to account for all objects that use this page layout.
- Users without the necessary license, profile, and permissions can't access record data.
- Users with the necessary permissions can create records from the related lists, and edit and delete the record from the record headline. These actions aren't supported on mobile devices.
- Page layouts for each object in Salesforce determine what fields display in the Record Information component. The fields in the Highlight Panel layout determines what displays in the Record Headline component. This feature includes support for record types. You can modify the page layout, the Highlight Panel, and record type settings in Salesforce Setup.
- Enable feeds on records in Salesforce to allow users to post on them in communities.

SEE ALSO:

Record Banner

Record Information Tabs

Record Related List

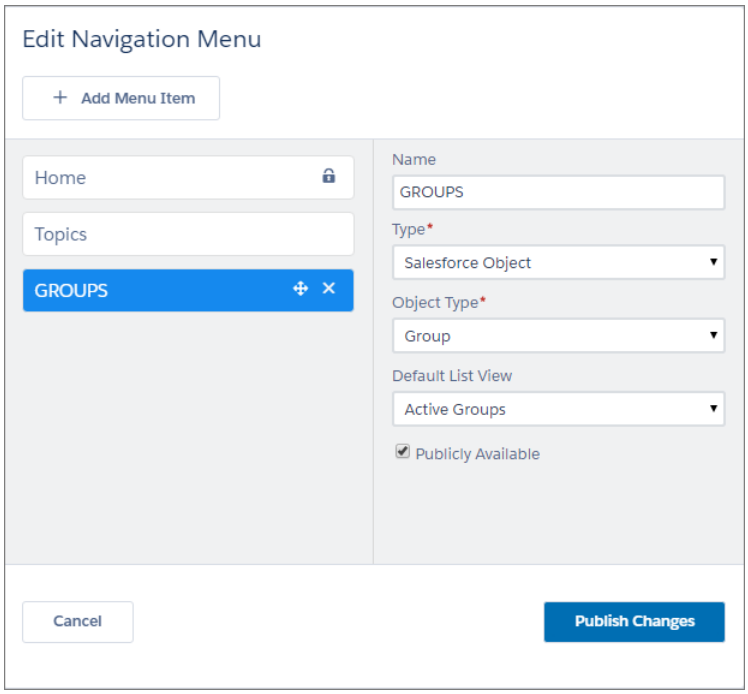
Add Groups to Your Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Customer Service community. Use the out-of-the-box design for groups or create your own customized version of the group detail page using separate components.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

1. To enable groups in your community, add groups to the community navigation menu.

   This automatically displays a menu item that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of active public groups.



2. Publish your community.
3. If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

When users click on the name of an active group in the community, they're redirected to the group detail page. If it's a private group, they're asked to log in. Only logged-in group members can view private group content.

A few things to keep in mind:

- When you enable groups in your community, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and the group feed. We recommend using this composite component, especially if you want your community pages to be responsive across desktop and mobile device browsers.
- If you prefer to use a different layout or want more granular control over the placement of group content, create a custom community page and use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages might not be responsive across all devices.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

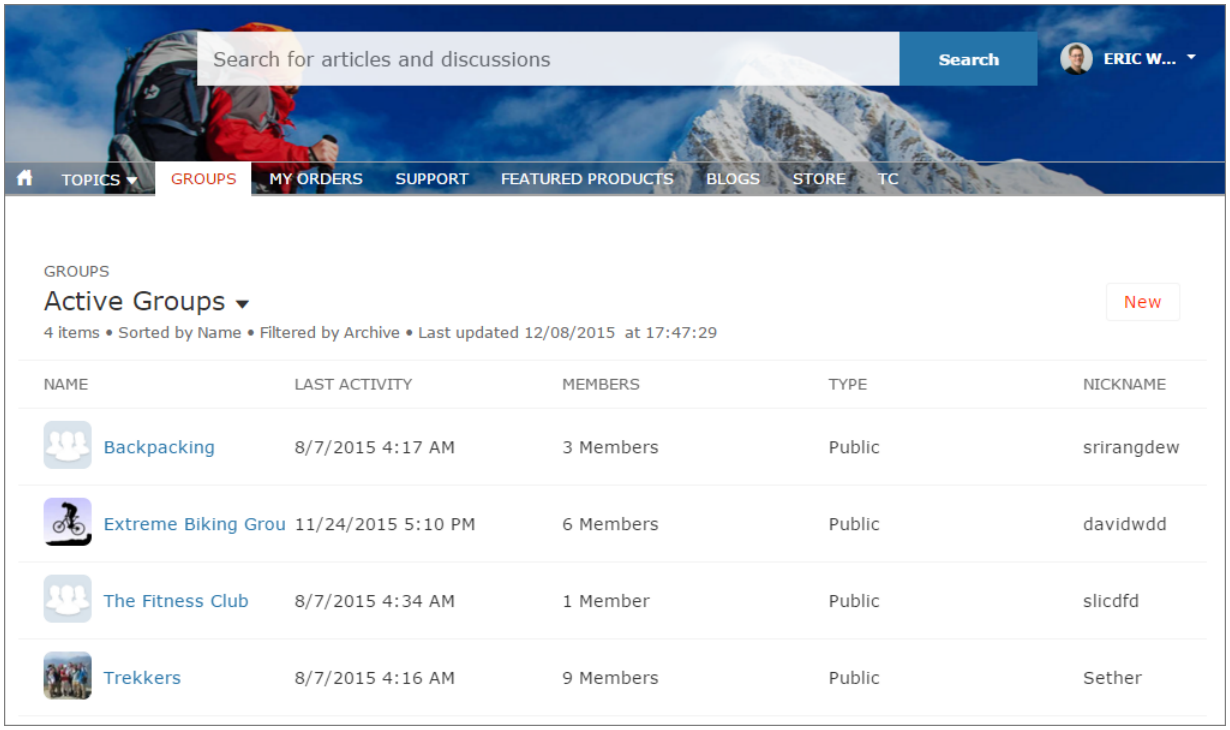
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

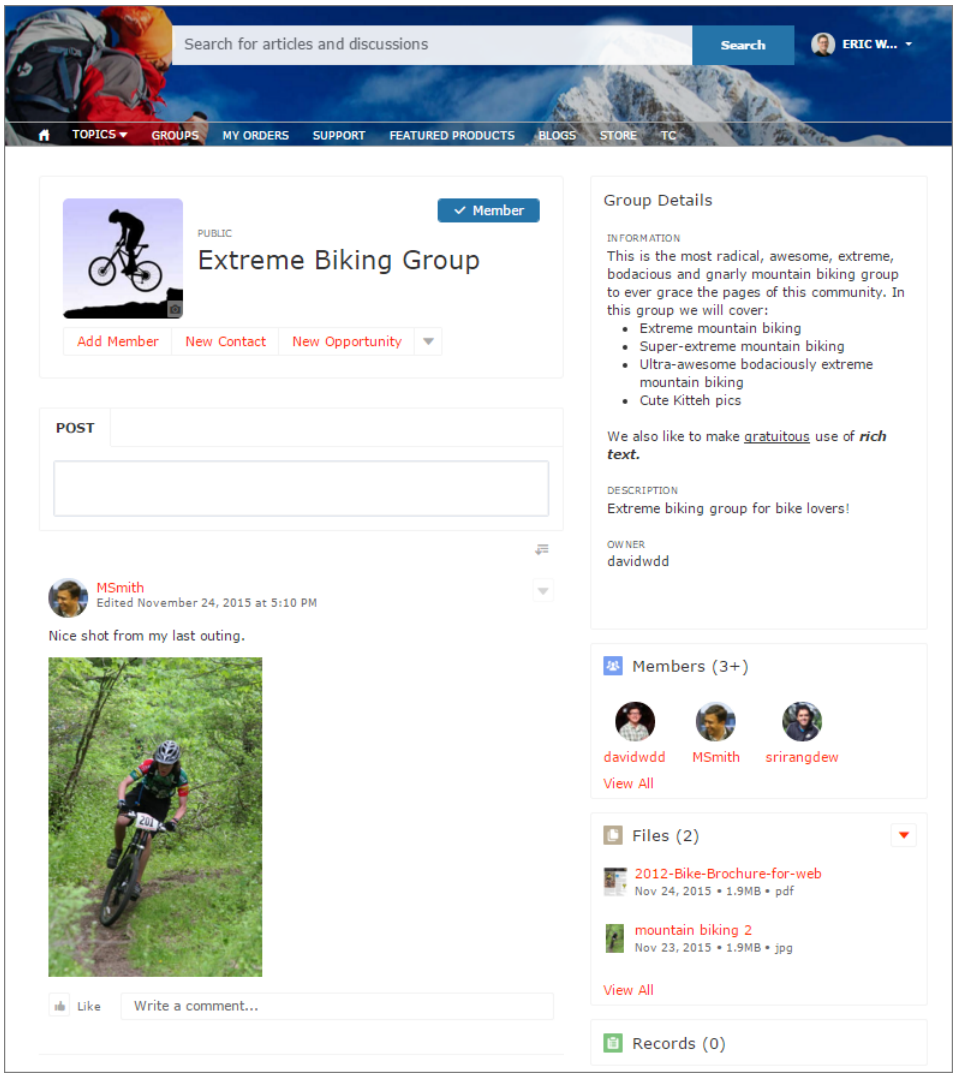
To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Group list in the Customer Service Template



Group detail page in Customer Service Template



External Data Sources in Your Community

Access your external data and content that are stored outside your Salesforce org from your community.

Let your community users access:

- Data that's stored in another Salesforce org, SAP® NetWeaver Gateway, or IBM WebSphere® that your org accesses via Salesforce Connect
- Content that's stored in Google Drive or SharePoint that your org accesses via Files Connect

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: Let's say you have a partner community for sales, and you store your product order information in a back-office ERP system. You can surface that information to your sales partners, enabling them to view and update orders within the context of all related data regardless of where it's stored.

Or maybe you store your templates for contracts and other agreements in a non-Salesforce environment. Your sales partners can access the latest versions of that content as needed.

SEE ALSO:

Salesforce Connect

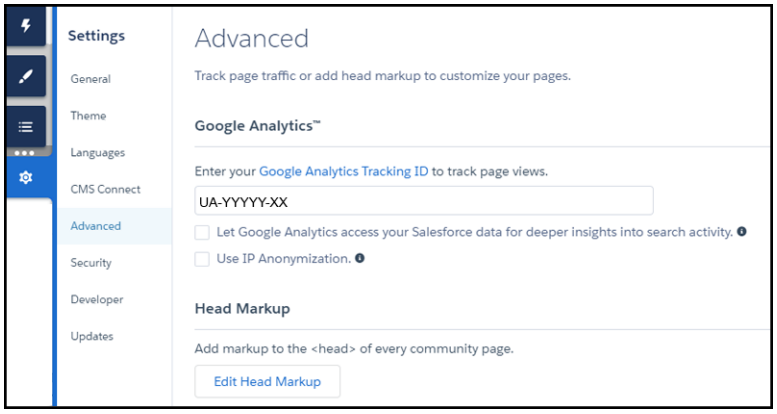
Identity Type for External Data Sources

Track Community Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views in your community. Enable access to your Salesforce data for deeper insights. Then, adjust your community's pages to more accurately reach your customers.

To track using Google Analytics:

1. In Community Builder, click on the left sidebar and click **Advanced**.
2. Enter your Google Analytics tracking ID.



3. To track user types, user IDs, and search activity, enable **Let Google Analytics access your Salesforce data for deeper insights into search activity**.
4. To enable the masking of IP addresses on the Google server side, which helps with privacy compliance or concerns, **Use IP Anonymization** .
5. To enable the service, publish the community.

Your community's analytics data streams directly to the Google Analytics service where you can review and interpret it.

Once you've set up Google Analytics to integrate with your Salesforce community's data, you can either create your own reports or you can install the preconfigured Google Analytics for Salesforce Communities package. For more information, see the Google Analytics for Salesforce Communities package write-up.

For developers of custom Lightning components for Communities, we provide the `global forceCommunity:analyticsInteraction` event. Use this event to track events triggered by the custom component.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Configure Google Analytics™ for Salesforce Communities
Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

SEE ALSO:

Lightning Components Developer Guide: forceCommunity:analyticsInteraction

Configure Google Analytics™ for Salesforce Communities

Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

Google Analytics integrates with your self-service community to track user types, user IDs, pageviews on Salesforce objects, and customer search activity. To correctly capture this information, some initial setup is required.

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

1. Before you begin, go to **Settings** > **Security**in Community Builder. Under **Content Security Policy**, choose **Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts**.
2. Next, let Google Analytics access your data to collect page views. In Community Builder, go to **Settings** > **Advanced** and enter your Google Analytics ID. For more information about the Google Analytics ID, check the Google Analytics documentation.
3. Then select **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity within your community.
4. To enable the masking of IP addresses on the Google server side, select **Use IP Anonymization**, which helps with privacy compliance or concerns.
5. Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information. From your Google Analytics account, go to **Admin** > **Property** > **Custom Definitions** > **Custom Dimensions**. Click **+New Custom Dimension**.
   a. For the first index you want to use, enter the Name: `User Type` and select **Hit** for the scope.
   b. For the second index, enter the Name `Salesforce Object` and select **Hit** for the scope.
6. Create a User-ID view. With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content. To create a User-ID view, go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
   a. For the User-ID view, enter the Name: `User Explorer`.
7. To track how different types of users are interacting with the community, click **Reporting** > **Audience** > **User Explorer** > **User Flow**
8. Once you've integrated Google Analytics with your community's data, you can create your own reports or you can install the preconfigured Google Analytics for Salesforce Communities package. Click here for more information about the Google Analytics for Salesforce Communities package.

Multilingual Communities Overview

Community Builder lets you create different language versions of your community. All languages are maintained within the community so you don't have to create and manage a separate community for each language.

Add and manage the languages that you want your community to support. After you add a language to the community, you'll notice the language selector globe on the toolbar, which lets you and your team switch between languages when editing the content of a page. Content editing is quick and easy because you never have to leave the page to change to another language.

Contributors, designers, and admins can each add language-specific content to a page using the language selector.

As a community admin or designer, you can also export community content as an .xml file and send it to your translation service. After you receive the edited file, simply import it back into your community to populate each page with the translated content.

In turn, to let your community visitors choose their preferred language from available languages when viewing the community, you can add a Language Picker component to your pages. And in case any part of the community content isn't available in their chosen language, you can specify a *fallback* language to display instead.

Example: For example, if a community visitor chooses French (CA) from the Language Picker, but there is no content for that page in French (CA), content in the fallback language—say, French (FR)—is displayed instead.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Create a Multilingual Community

Creating a multilingual community is a multistep process. It involves defining the languages you want your community to support, adding translated content for each language, and letting your community visitors choose their preferred language.

Set the Default Language for Your Community

The default language is the language in which your community initially displays. By default, it's set to English (US), and it serves as the starting point when you add new languages.

Add Languages to Your Community

Add the languages you want your community to support.

Set Language Options

After you add community languages in the Languages view, you can define separate settings for each one.

Edit Language Content on the Page

The Community Builder language selector lets you switch between languages as you edit content on each page.

Export Language Content

Export one or more community languages as an .xml file that you can send to your translation service.

Import Translated Content

After your translation service has completed the translations, import a translated .xml file back into your community.

Delete a Language

When you delete a language, the translated content is not deleted—it's just no longer available to your or your team. When you add the language back to the community, you can access the translated content again.

SEE ALSO:

Add a Translate Button to Feed Items in Communities

Create a Multilingual Community

Creating a multilingual community is a multistep process. It involves defining the languages you want your community to support, adding translated content for each language, and letting your community visitors choose their preferred language.

1. Set the default language for your community. It's important to set the default language before you add translated content to your community.
2. Add languages to the community.
3. Set options for each language, such as the display label and fallback language.
4. Export the content for translation and then import the translated content.
5. Add a Language Selector component to your community pages, so unauthenticated community users can choose their preferred language.

SEE ALSO:

Multilingual Communities Overview

Edit Language Content on the Page

Language Selector

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Set the Default Language for Your Community

The default language is the language in which your community initially displays. By default, it's set to English (US), and it serves as the starting point when you add new languages.

It's important to set the default language before you add any language content to your community. This setting is not associated with the default language setting in your Salesforce org.

1. On the left sidebar, click > **Languages**.
2. Select a language in the Default Community Language list.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Note: If you decide to change the default language after you add translated content, you must first export the translated content, then change the default language, and finally, import the content back into your community. Otherwise the translated content won't appear for the newly selected default language.

For example, let's say you make English the default community language and add French as a community language. After you add content in both English and French, you decide to change the default community language to French. To preserve the French content, you must first export it. Then, select French as the default community language before importing the French content back into the community.

SEE ALSO:

Add Languages to Your Community

Set Language Options

Add Languages to Your Community

Add the languages you want your community to support.

1. On the left sidebar, click > **Languages**.
2. Click **Add Languages**.
3. Select the languages you want to add to your community.
4. If necessary, reorder the list as you want it to appear in any language selector.
5. Save your changes.

SEE ALSO:

Set the Default Language for Your Community

Edit Language Content on the Page

Set Language Options

Delete a Language

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Set Language Options

After you add community languages in the Languages view, you can define separate settings for each one.

1. On the left sidebar, click > **Languages**.
2. Select a language in Community Languages.
3. Update any of the following settings:

Option	Description
Active on Live Community	If you add a language picker component to your active community, this checkbox controls whether the language shows in the list. Use the property to hide a language until you're ready to release the associated content to your community visitors.
Fallback Language	The fallback language displays when there's no content available for the currently selected language. For example, if a community visitor chooses Japanese from the language selector, but there is no content for that page in Japanese, content in the fallback language is displayed.
Display Label	You can define the display label for each language. The display label appears in any language picker components you add to your community and in the language selector in Community Builder.

SEE ALSO:

Add Languages to Your Community

Set the Default Language for Your Community

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

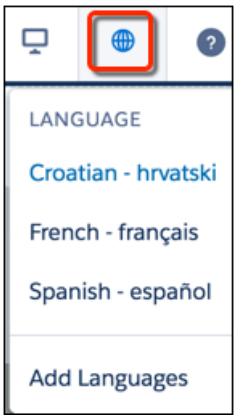
- Create and Set Up Communities AND View Setup and Configuration

Edit Language Content on the Page

The Community Builder language selector lets you switch between languages as you edit content on each page.

When the page is open:

1. Select a language in the Community Builder language selector.



2. Select a component on the page.
   The Property Editor for the selected component is displayed. By default, all components inherit the default community language so you see English (US) values until you add your language content.
3. Enter the translated content in the appropriate fields.

Note: Community Builder does not validate languages as you enter content. Take care to add the correct content for the selected language.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Export Language Content

Export one or more community languages as an .xml file that you can send to your translation service.

1. On the left sidebar, click > **Languages**.
2. Click **Export Content**.
3. Select the language content that you want to export for translation.
4. Optionally, enter a different filename. The default name is `languages.xml`.
5. Click **Export**.
6. If required by your browser, choose where to save the file.

After you export the .xml file, you can send it for translation.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Example: The .xml file contains a time stamp attribute that records the time of the export, and encloses all translatable content in CDATA sections, as shown in this example.

```
<?xml version="1.0" encoding="utf-8"?>
<languagedata exporttimestamp="1508180569700" version="1.0">

<component context="Rich Content Editor (Aura)" id="89445f2d-70d2-4cfc-a496-bb07bd1b2c94">
<field name="AuraAttributes" language="en_US" exportcrc="1287625607">
<property name="richTextValue"><![CDATA[<p>This is our English content.</p>]]></property>
</field>
</component>

<component context="Rich Content Editor (Aura)" id="89445f2d-70d2-4cfc-a496-bb07bd1b2c94">
<field name="AuraAttributes" language="fr_FR" exportcrc="1287625607">
<property name="richTextValue"><![CDATA[<p>This is our French content.</p>]]></property>
</field>
</component>

</languagedata>
```

When you receive the translated .xml file, import it back into the community.

SEE ALSO:

Import Translated Content

Import Translated Content

After your translation service has completed the translations, import a translated .xml file back into your community.

1. On the left sidebar, click > **Languages**.
2. Click **Import Translation**.
3. Drag and drop or browse to select a translated .xml file.
   A message appears to indicate whether the content was imported successfully, unless the file is over 1 MB. In that case, you'll receive an email when the import process finishes.

After you import the translated content, test your pages to make sure the content displays correctly. For each page, use the Community Builder language selector to view the page in each supported language.

SEE ALSO:

Export Language Content

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Delete a Language

When you delete a language, the translated content is not deleted—it's just no longer available to your or your team. When you add the language back to the community, you can access the translated content again.

1. On the left sidebar, click > **Languages**.
2. Click beside the language you want to delete.

SEE ALSO:

Add Languages to Your Community

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Improve Community Performance

Use the Community Page Optimizer to analyze community performance. Use the Community Cloud Content Delivery Network and browser caching to improve page load times.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Analyze and Improve Community Performance

The Salesforce Community Page Optimizer analyzes your community and identifies issues that impact performance. Use the information to refine your design and improve community performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

Community Cloud Content Delivery Network Considerations

The Community Cloud Content Delivery Network (CDN) can help you reduce page load times in your community. However, there are a few things to consider before and while using the CDN.

Set Up the Community Cloud Content Delivery Network

Improve the page load time of your community by setting up a free Salesforce content delivery network (CDN). This feature is available in Lightning and Salesforce Tabs + Visualforce communities.

Improve Community Performance with Browser Caching

If you use many components in your Lightning community, improve community performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your community's experience to better engage customers.

Progressive Rendering Guidelines

Here are some guidelines for how to get the most out of Progressive Rendering.

Prioritize Component Display Order with Progressive Rendering

Quickly set the display order of components on your community pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

Analyze and Improve Community Performance

The Salesforce Community Page Optimizer analyzes your community and identifies issues that impact performance. Use the information to refine your design and improve community performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

To download the Community Page Optimizer, in Community Builder, click on the left sidebar and click **Advanced**.

EDITIONS

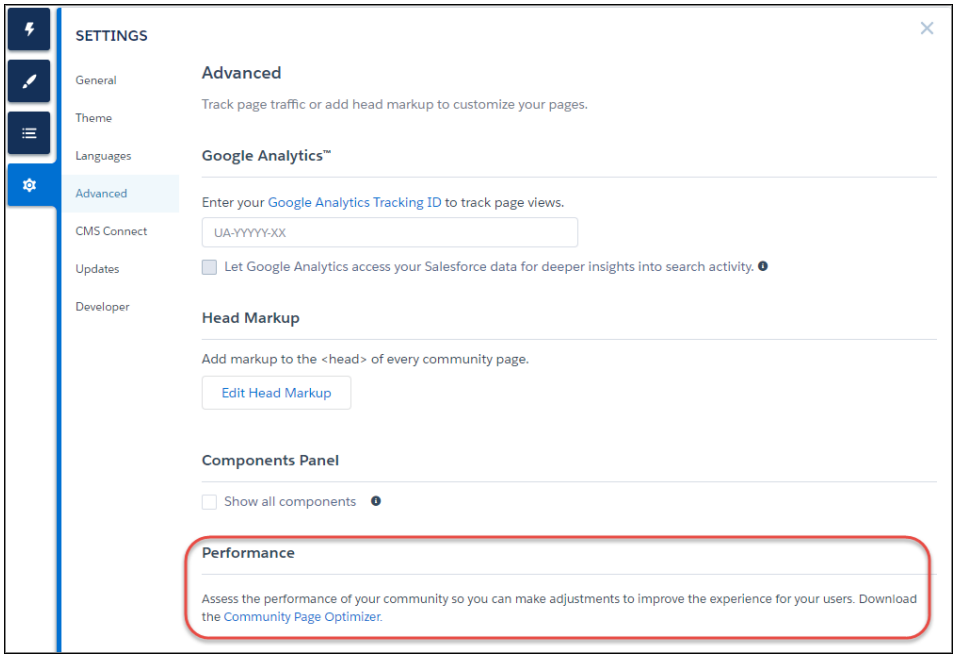
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

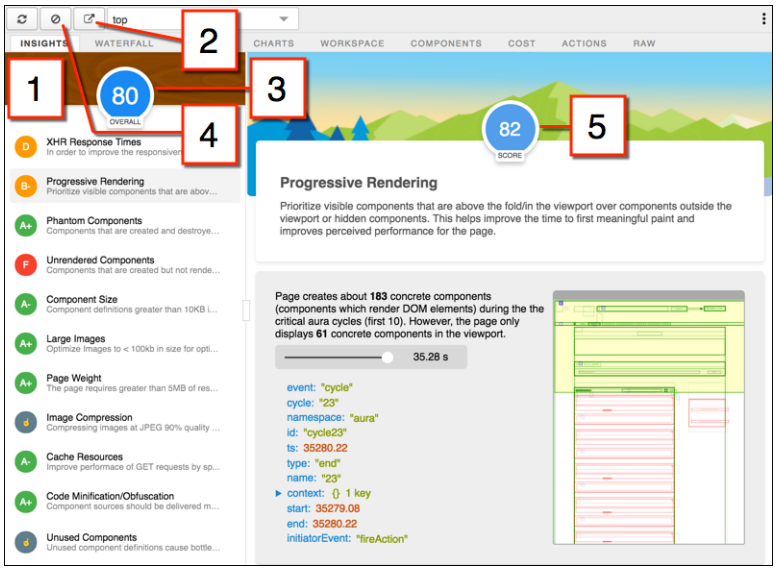
- Create and Set Up Communities AND View Setup and Configuration



After installation, the Community Page Optimizer is located with your other Chrome extensions.

Insights

To analyze your community, navigate to your published community, load the page, and then launch the Community Page Optimizer.



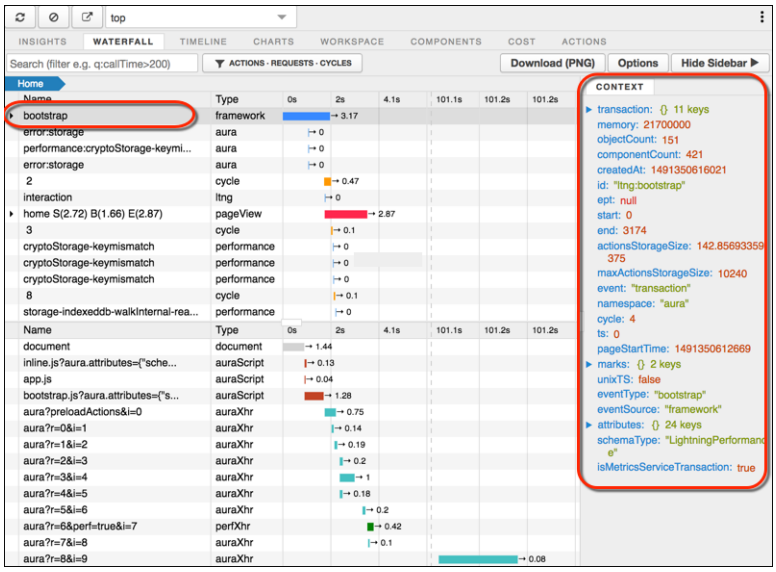
The Insights tab (1) evaluates your page based on best practices for web applications developed using the Lightning framework. This tab displays an overall performance score (3) along with individual scores (5) for various analysis rules. To view details and suggested actions, click each rule. Click **Popout** (2) for more room to work.

The Insights tab is conservative in providing recommendations. For further insights, consider reviewing the raw data presented on the Waterfall, Timeline, Charts, Cost, and Actions tabs.

Click **Clear** (4) to remove collected metrics. Perform some user actions on the page to collect new metrics and then reopen the Community Page Optimizer. For example, to gather performance metrics for liking a feed item, clear performance metrics, click Like, and reopen the Community Page Optimizer.

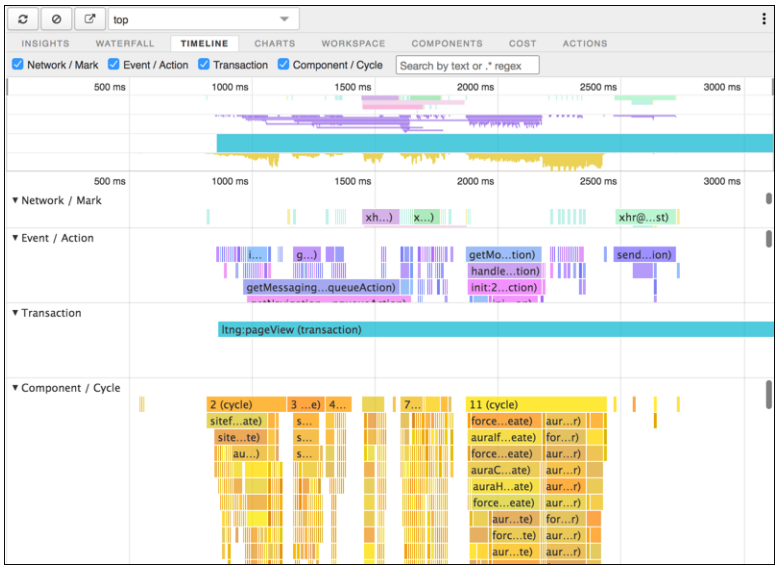
Waterfall

The Waterfall tab displays all network requests and performance instrumentation data. Click a row to view contextual information in the sidebar. Click the arrow to the left of each row to expand the information for each row.



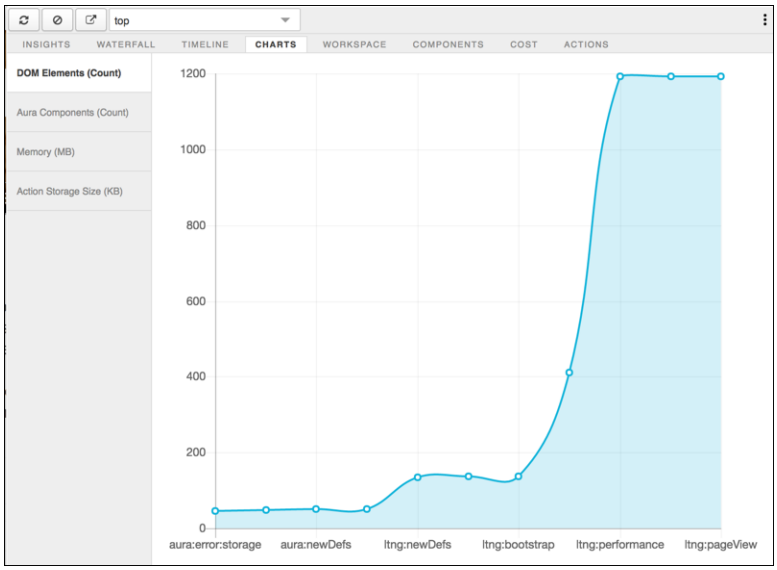
Timeline

The Timeline tab provides a profile of each component's rendering life cycle. The timeline view is optimized for displaying Lightning framework metrics, so it's easier to interpret than Chrome DevTools.



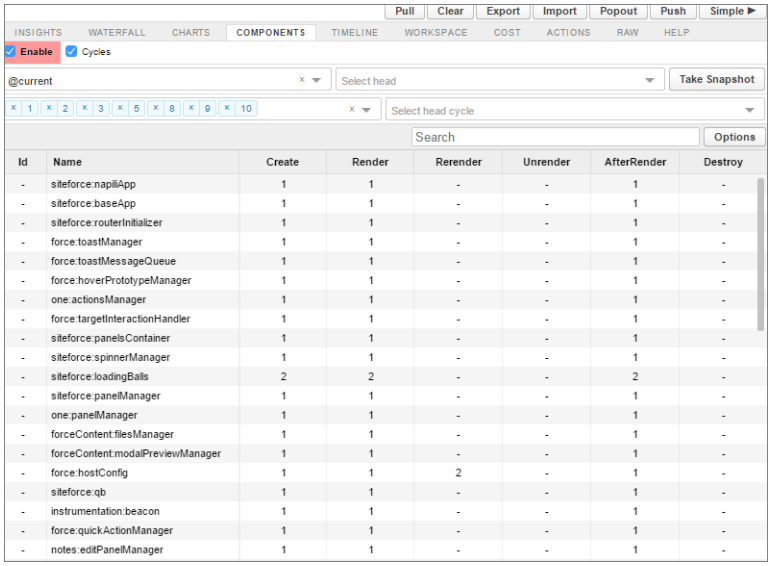
Charts

The Charts tab displays trending information about memory and components as customers use your page.



Components

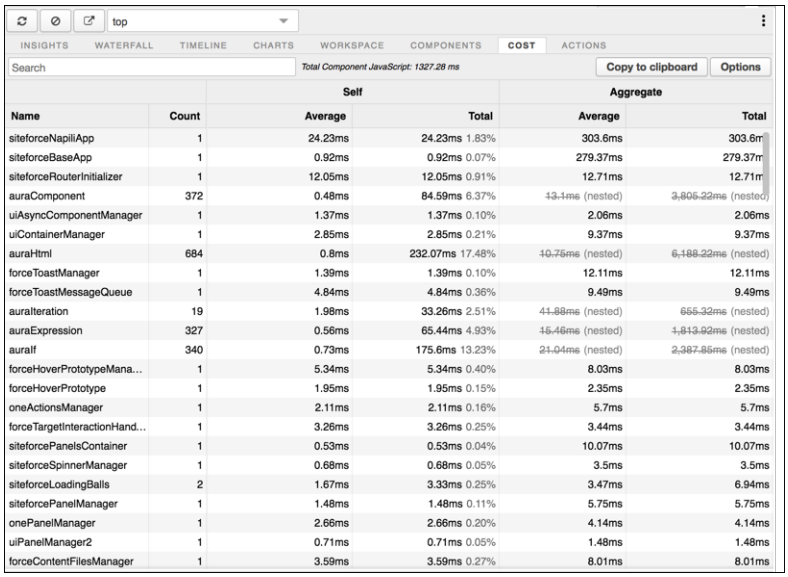
The Components tab displays the life cycle counts for each component on the page. This view helps you identify potential component leaks and unexpected rendering behavior. Use the Component tab along with the Cost tab for an overall view of component performance.



Id	Name	Create	Render	Rerender	Unrender	AfterRender	Destroy
-	siteforce:napiliApp	1	1	-	-	1	-
-	siteforce:baseApp	1	1	-	-	1	-
-	siteforce:routerInitializer	1	1	-	-	1	-
-	force:toastManager	1	1	-	-	1	-
-	force:toastMessageQueue	1	1	-	-	1	-
-	force:hoverPrototypeManager	1	1	-	-	1	-
-	one:actionsManager	1	1	-	-	1	-
-	force:targetInteractionHandler	1	1	-	-	1	-
-	siteforce:panelsContainer	1	1	-	-	1	-
-	siteforce:spinnerManager	1	1	-	-	1	-
-	siteforce:loadingBalls	2	2	-	-	2	-
-	siteforce:panelManager	1	1	-	-	1	-
-	one:panelManager	1	1	-	-	1	-
-	forceContent:filesManager	1	1	-	-	1	-
-	forceContent:modalPreviewManager	1	1	-	-	1	-
-	force:hostConfig	1	1	2	-	1	-
-	siteforce:qb	1	1	-	-	1	-
-	instrumentation:beacon	1	1	-	-	1	-
-	force:quickActionManager	1	1	-	-	1	-
-	notes:editPanelManager	1	1	-	-	1	-

Cost

The Cost tab displays the amount of time each component was busy processing its logic. The lower the time, the better the performance.



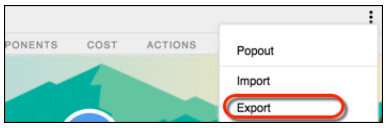
		Self		Aggregate	
Name	Count	Average	Total	Average	Total
siteforceNapiliApp	1	24.23ms	24.23ms 1.83%	303.6ms	303.6m
siteforceBaseApp	1	0.92ms	0.92ms 0.07%	279.37ms	279.37m
siteforceRouterInitializer	1	12.05ms	12.05ms 0.91%	12.71ms	12.71m
auraComponent	372	0.48ms	84.59ms 6.37%	~~13.1ms~~ (nested)	~~3,805.22ms~~ (nested)
uiAsyncComponentManager	1	1.37ms	1.37ms 0.10%	2.06ms	2.06ms
uiContainerManager	1	2.85ms	2.85ms 0.21%	9.37ms	9.37ms
auraHtml	684	0.8ms	232.07ms 17.48%	~~10.75ms~~ (nested)	~~6,188.22ms~~ (nested)
forceToastManager	1	1.39ms	1.39ms 0.10%	12.11ms	12.11ms
forceToastMessageQueue	1	4.84ms	4.84ms 0.36%	9.49ms	9.49ms
auraIteration	19	1.98ms	33.26ms 2.51%	~~41.88ms~~ (nested)	~~655.32ms~~ (nested)
auraExpression	327	0.56ms	65.44ms 4.93%	~~15.46ms~~ (nested)	~~1,813.92ms~~ (nested)
auraIf	340	0.73ms	175.6ms 13.23%	~~21.04ms~~ (nested)	~~2,387.85ms~~ (nested)
forceHoverPrototypeMana...	1	5.34ms	5.34ms 0.40%	8.03ms	8.03ms
forceHoverPrototype	1	1.95ms	1.95ms 0.15%	2.35ms	2.35ms
oneActionsManager	1	2.11ms	2.11ms 0.16%	5.7ms	5.7ms
forceTargetInteractionHand...	1	3.26ms	3.26ms 0.25%	3.44ms	3.44ms
siteforcePanelsContainer	1	0.53ms	0.53ms 0.04%	10.07ms	10.07ms
siteforceSpinnerManager	1	0.68ms	0.68ms 0.05%	3.5ms	3.5ms
siteforceLoadingBalls	2	1.67ms	3.33ms 0.25%	3.47ms	6.94ms
siteforcePanelManager	1	1.48ms	1.48ms 0.11%	5.75ms	5.75ms
onePanelManager	1	2.66ms	2.66ms 0.20%	4.14ms	4.14ms
uiPanelManager2	1	0.71ms	0.71ms 0.05%	1.48ms	1.48ms
forceContentFilesManager	1	3.59ms	3.59ms 0.27%	8.01ms	8.01ms

Actions

The Actions tab displays a list of all actions performed on the page, along with their timing information.

Export

Export your analysis to a file to share with your development and support teams.



Submit Feedback

We want to hear from you. Share your comments, questions, requests, and any issues that you find. Submit Feedback.

Community Cloud Content Delivery Network Considerations

The Community Cloud Content Delivery Network (CDN) can help you reduce page load times in your community. However, there are a few things to consider before and while using the CDN.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited**, Editions

Before You Begin

- Your domain must use the same CNAME as shown on the domain page in Salesforce Setup. If the CNAME is different, your domain is redirected from the CDN and without HTTPS support during certificate renewal or when new domains are added to the certificate.
- If your domain or the subdomain you are adding to the CDN has a Certification Authority Authorization (CAA) record, add a Let's Encrypt certificate to the record. Go to the Let's Encrypt website for more information.

General

- Each org is limited to 5 TB of CDN usage. If the org limit is exceeded, users accessing your domains are redirected, potentially causing less than optimal performance. Also, you can't create new domains that use the Salesforce CDN nor direct current domains to the CDN. Contact Salesforce Customer Support if you need help managing your usage.
- When you enable the CDN, your domain uses Akamai, a third-party CDN service, to optimize its content delivery. All information sent to or returned by this domain, which includes data submitted to the domain, web page content returned from the domain, data tables on those pages, images, files, JavaScript code, style sheets, and static resources, are stored and transmitted by Akamai. Akamai can offer different privacy and security protections than those offered by Salesforce. Salesforce is not responsible for the privacy and security of the data that is shared with Akamai. All communications between Akamai and Salesforce are conducted over HTTPS.

Set Up the Community Cloud Content Delivery Network

Improve the page load time of your community by setting up a free Salesforce content delivery network (CDN). This feature is available in Lightning and Salesforce Tabs + Visualforce communities.

To improve page load time performance, the following resources are cached on the Community Cloud CDN:

- Resources that are accessible in a public community without authentication, including HTML, JavaScript, CSS, image, and font files
- Resources that are configured as publicly cacheable, such as Salesforce static resources with the Cache Control setting configured to Public

The Community Cloud CDN is supported in production environments in Enterprise, Performance, and Unlimited editions. It is not supported in sandbox environments or Developer and Partner Developer editions because they don't support custom domains.

Note: With the Community Cloud CDN, the server certificate changes frequently. Don't use the Community Cloud CDN if your org has API clients that require the exact server certificate rather than the root certificate authority.

Because the Community Cloud CDN uses shared certificates, each certificate often includes other customer hostnames in the subject alternative name list.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited**, Editions

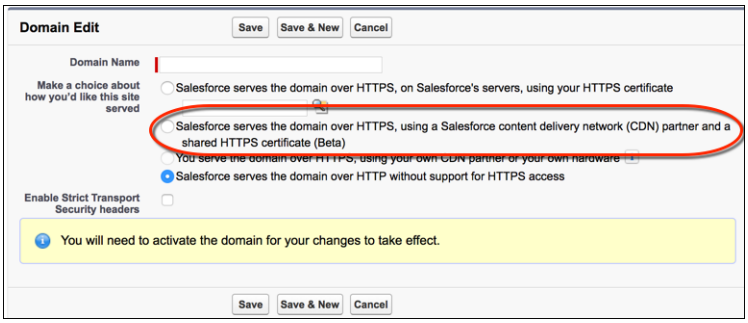
USER PERMISSIONS

To create, customize, or publish a community:

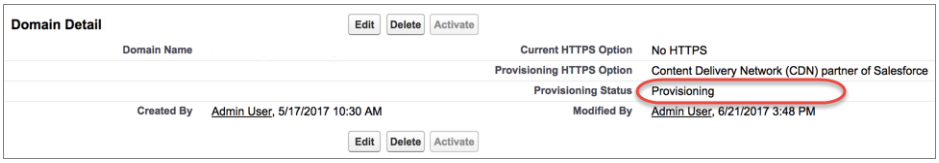
- Create and Set Up Communities AND View Setup and Configuration

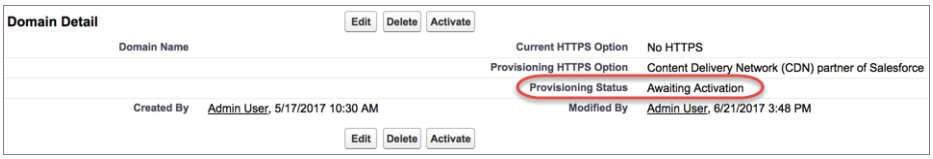
1. **Get Ready**
   a. From Setup, enter `Communities Settings` in the Quick Find box, and then select **Communities Settings**. Click **Enable communities** and enter a domain name (for example, MyCompany.force.com).
   b. Obtain a custom domain (outside of Salesforce), and add it to your org as a domain record.
   c. From Setup, enter `Custom URLs` in the Quick Find box, and then select **Custom URLs**. Associate your custom domain to your community site URL.
2. **Provision and Activate the Community CDN**
   a. From Setup, enter `Domains` in the Quick Find box, and then select **Domains**.
   b. Next to your custom domain, click **Edit** for your custom domain.
   c. Select **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner and a shared HTTPS certificate** and click **Save**.

      Akamai is the CDN partner.



The Community Cloud CDN provisioning process and can take 4–12 hours. The Provisioning Status field changes from Provisioning to Awaiting Activation when complete. You receive an email when the process is complete. No downtime or disruption is expected during the provisioning process.

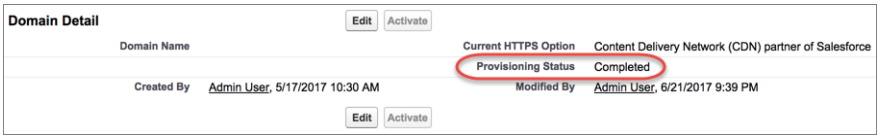




Note: Changing to the Salesforce CDN affects SAML Single Sign-On Settings for all custom URLs in that domain. Reconfirm the SAML Single Sign-On Settings for each HTTPS custom URL in that domain after activating the change. Login Settings are available in Community Workspaces under Administration | Login & Registration.

d. Activate your domain.

Your community can be unavailable for 10–15 minutes so provision and activate the Community Cloud CDN when your community traffic is low. The Provisioning Status field changes from Awaiting Activation to Complete.



Provision and activate the Community Cloud CDN when your community traffic is low.

If you add a domain at the same time as you provision Community Cloud CDN, visitors to your community could see a certificate error during the provisioning process and before you activate the domain. The hostname on the certificate does not match the custom domain until you activate the domain.

The provisioning process can take 4–12 hours to complete, and then you must activate the domain within Salesforce. Until you activate the domain, the domain uses its previous HTTPS configuration. If you're adding a domain to your org with the Community Cloud CDN option, the initial configuration before activation is HTTP.

When switching a domain previously added to the org as HTTP only or as HTTPS with a certificate, you must wait 4–6 hours for the provisioning process to complete. After you activate the domain, visitors to your community can observe the following transition-related issues for up to 5 minutes:

- Connection reset errors. The community doesn't load.
- The message "Server DNS address could not be found."

You have a set amount of CDN usage per year. As you approach that limit, we send out emails letting you know well in advance. Emails are sent when you hit 70%, 80%, and 90% of your limit. Emails are sent daily when your usage is between 90% and 100%. Once you've crossed that limit, your domain is removed from the CDN. If your community has a custom domain using HTTPS or an external domain using HTTPS, you are switched to that domain. If you don't have either of those domains, we redirect your domain to your community's force.com URL.

To stop using the Community Cloud CDN, repeat the same process.

- Provision your custom domain to use an option other than **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner and a shared HTTPS certificate**.

  When you roll back within 24 hours after activating the Community Cloud CDN, it's immediate. Rolling-back more than 24 hours after activating Community Cloud CDN can take 10–20 minutes. You can activate your custom domain when ready. Upon activation, visitors to your community can observe up to 5 minutes of the same transition-related issues that can occur while provisioning the Community Cloud CDN.

SEE ALSO:

View and Edit Single Sign-On Settings

Add a Domain

Manage Domains and Custom URLs

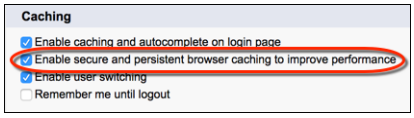
Improve Community Performance with Browser Caching

If you use many components in your Lightning community, improve community performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

The **Enable secure and persistent browser caching to improve performance** setting is enabled by default.

To verify that this setting is enabled:

1. From Setup, enter `Session Settings` in the Quick Find box and then select **Session Settings**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your community's experience to better engage customers.

Progressive Rendering improves the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your community pages take a long time to load before you see the components rendered on the screen, then progressive rendering may help improve your experience.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer Editions**

Assign one of three priorities to any top-level component.

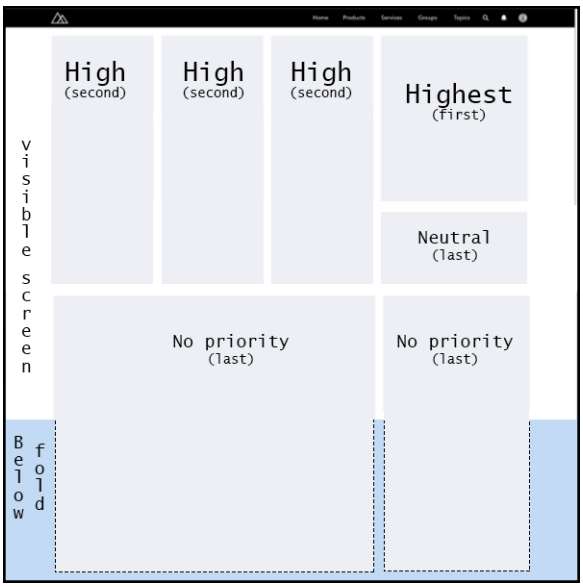
Table 3: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

Note: Only top level components in the content area of your pages can have a priority. You can't assign a priority to a nested component.

As an example, assign **Highest** (1st) to the few components that you want to be viewed first. Specify **High** (2nd) for those components that can load later without affecting your customer's experience. Unassigned components are treated as **Neutral** by default and are displayed last. There is no right choice for assignments, but a lack of planning can degrade performance and diminish positive experiences on your site.

For instance, you may want a critical notice to appear first, prioritized as highest, and then fill in some of your highlighted content, prioritized as high. All other components, visible and those below the fold, load after these have been rendered. Whether explicitly prioritized as neutral or not, they are treated as neutral.



Note: All unassigned components are set to **Neutral** priority.

Because Progressive Rendering requires careful planning and testing, it is off by default. Turn it on from the **Advanced** section of your Community Builder Settings. Using this feature requires time and effort. But don't worry, we've got some ideas to help you get started in the Progressive Rendering Guidelines

So, what happens while Progressive Rendering is doing its thing? Your community page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering won't cause any visual issues. However, you may notice components rearranging as the page displays, depending on which components you've prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

Assign a priority to a component in the actions menu of the Property Editor.

Note: After you set the priorities, adding, deleting, or duplicating a component or changing themes or layouts won't change your priority settings, but it invalidates your assumptions and testing. Any changes should kick-off a new round of testing in order to ensure your choices remain effective. We'll try to notify you when you make those kinds of changes, but you still have to do the testing. Always make testing a part of your change plan.

Turning off Progressive Rendering removes prioritized behavior, but your settings remain. If you turn on Progressive Rendering again later, the original prioritizations go back into force. While the continuity makes testing easier, the results can surprise you if you don't watch for it.

SEE ALSO:

- Salesforce Community Page Optimizer analyzer
- Prioritize Component Display Order with Progressive Rendering
- Assign Audiences to Components

Progressive Rendering Guidelines

Here are some guidelines for how to get the most out of Progressive Rendering.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer Editions**

When should you use Progressive Rendering?

That is the right question to ask first. Not all communities need to use this powerful feature, so don't rush to use it. However, when you need it, you really need it.

Progressive Rendering is designed to help improve the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your community pages take a long time to load before you see the components rendered on the screen, then progressive rendering may help improve your experience.

Use the Community Page Optimizer tool to determine if Progressive Rendering is a good choice for your community pages and to get suggestions on how to prioritize your components. It can also help you evaluate the performance impact of your configurations.

Note: Community Page Optimizer is available as a Chrome extension. You can read more about the tool in its documentation.

Finding the right configuration that works best for you both in terms of performance and user experience may take a few iterations of configuration and testing.

Which components are good candidates for prioritization?

Generally, it's probably best to have very few, small (but important) components in the **Highest** group. However, trial and error testing and in-depth performance analysis are the best routes to figuring out how to best optimize your pages.

What happens while Progressive Rendering is doing its thing?

Your community page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering won't cause any visual issues. However, you may notice components rearranging as the page displays, depending on which components you've prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

When should you revisit your priority settings?

Once priorities are set, adding, deleting, or duplicating a component or changing themes or layouts potentially invalidates your currently set priorities. Any changes require you to review the display order to ensure it's still effective.

Test, test, test

Always test your pages when you've made changes to your priority settings. We've made it easy to test the page with and without Progressive Rendering enabled. Your component priority settings will be remembered if you turn the feature off and reapplied when you turn it back on again.

SEE ALSO:

- Prioritize Component Display Order with Progressive Rendering
- Salesforce Community Page Optimizer analyzer

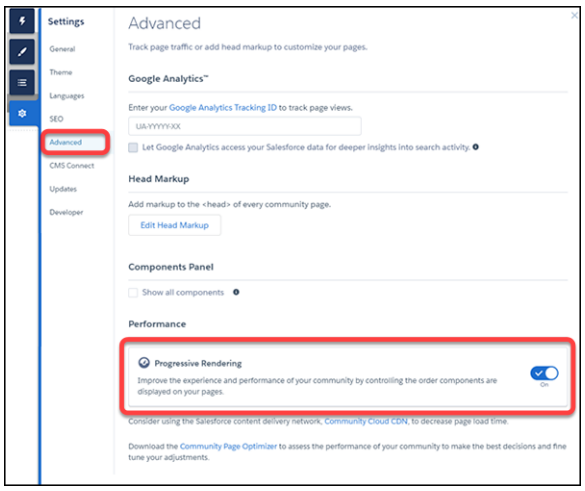
Prioritize Component Display Order with Progressive Rendering

Quickly set the display order of components on your community pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

Before you activate this feature, read Component Prioritization Guidelines on page 473. Determine the need and value of using Progressive Rendering for your site.

Choose the components you want to load first and which can load later. Evaluating components is a combination of determining their computational load and their design and user impact. Good decisions require research, analysis, testing, and retesting. Consider working with other disciplines, such as usability experts, to be sure that you are evaluating all the potential impacts.

1. In the Community Builder Advanced settings, enable Progressive Rendering.



2. Select a component on the page.
3. From the actions menu (1) in the Property Editor, select **Assign Display Priority** (2).

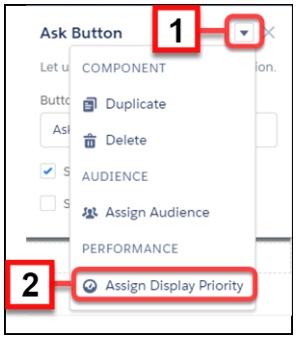
EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

To enable Progressive Rendering and apply settings:

- Create and Set Up Communities AND View Setup and Configuration



4. Choose the appropriate priority and click **Assign**.

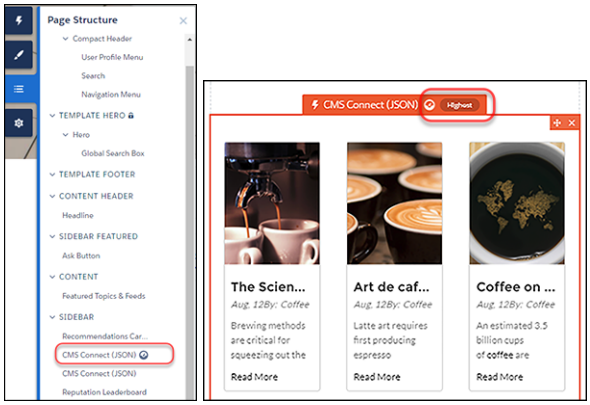
   There are 3 priority choices.

Table 4: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

After you select a priority, a color border and icon around the component indicates the priority that is assigned. An icon also appears by the component in the Page Structure panel. In addition, a banner is added to the community page to remind you that there are components with priorities set on the page.

To change the priority later, select **Edit Display Priority** in the component menu, or click either of the priority icons displayed in the page structure menu or the component border.



To remove the priority entirely, select **Unassign Display Priority** in the component menu.

5. Test your results and ensure that the experience is what you expect.

If you add new components, or change the priorities of existing components, re-examine the priority choices on your page to be sure that they are still appropriate and working as intended.

SEE ALSO:

- Progressive Rendering Guidelines
- Salesforce Community Page Optimizer analyzer

Salesforce Content Management System (CMS) (Beta)

A content management system (CMS) lets you create and manage content from a single location, and then use that content in multiple places. With Salesforce CMS, you can share content across communities, curate content on a community by community basis, and assign access roles to control who creates content.

Note: Salesforce CMS is a beta feature. Salesforce admins, content managers, and content admins can access this beta feature in the Salesforce App Launcher and Communities administrators can do so in the Content Management workspace of any community. You can provide feedback and suggestions for Salesforce CMS in the Community Cloud group in the Trailblazer Community.

EDITIONS

Available in: Lightning Experience

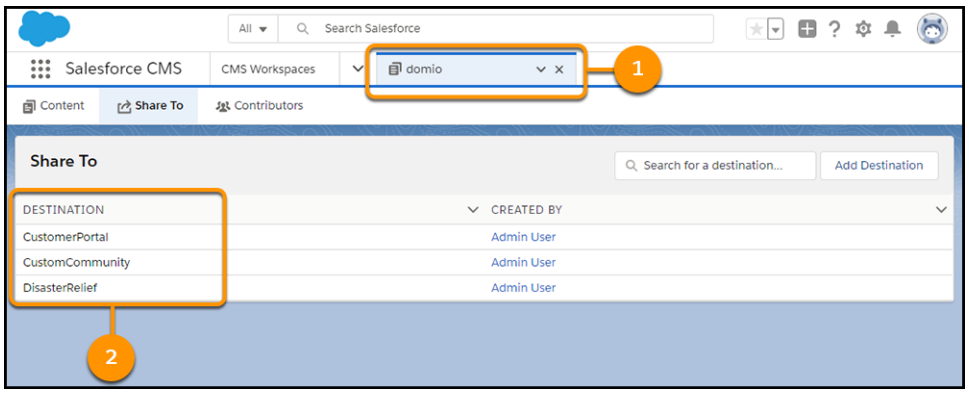
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Creating, curating, and delivering content to your users requires different roles in two separate environments—the Salesforce CMS app and your Lightning communities. Organizing and managing that content is a team effort.

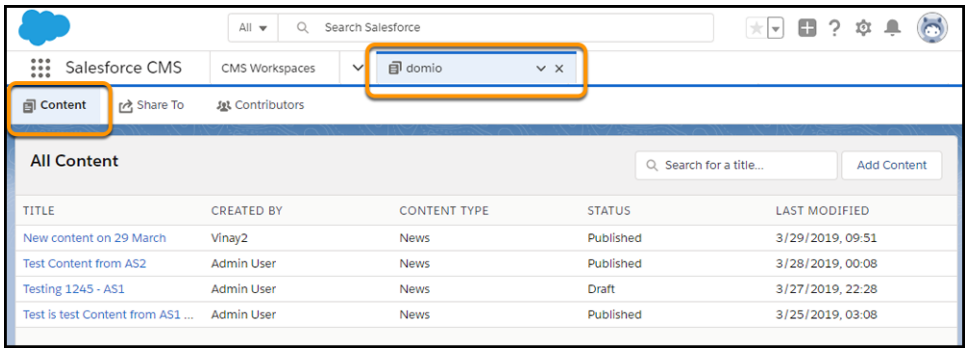
- **Creation and sharing** of content happens in the Salesforce CMS app. Users with content admin and content manager security roles can work on content without the need for administrative access to communities.
- **Curation, organization, and display** of content occurs in your communities, where other team members can make sure that the best content is seen by the right people.

Create and Share Content in Salesforce CMS

Workspaces (1) in the Salesforce CMS app is where you create content, define content access, and define destinations (2) so you can share content easily and limit access to appropriate contributors. Create separate CMS workspaces to differentiate internal and external information, different geographies, or even different campaigns.



Content created in a CMS workspace is shared with all the communities that you add to that workspace. Other team members take on the job of curating that content from within each community, and decide who sees it and how it appears.

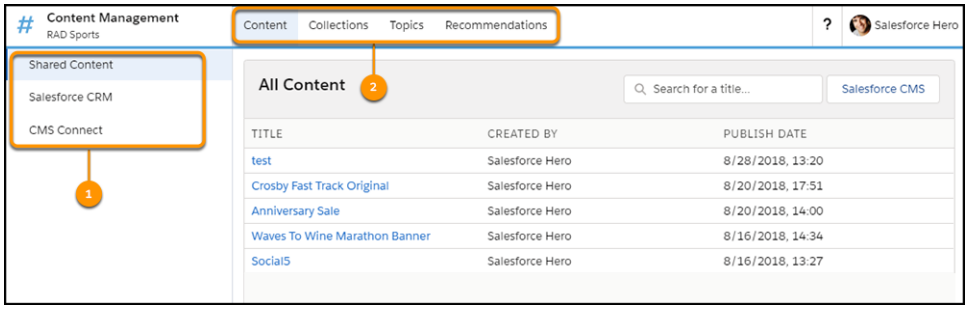


Note: Although the Salesforce CMS app is available in sandbox orgs, you can't migrate CMS content to a production org. Therefore, we recommend using the CMS app in you production org to create content you want to use beyond testing.

Curate, Organize, and Display Content in Your Community

In a community where content has been shared, you can organize content into collections or tag it as needed in the Content Management workspace. And lastly, in Community Builder, add it to the page and publish your community to make the content live.

Content Management has three main areas (1) and several ways to group and organize content (2) for easy and automatic display.



The display of content is managed separately in each community, even though the creation and sharing of content across communities is managed from your Salesforce org. So let's first look at the kind of content you can use or create.

- **Shared Content** is content that was created in the Salesforce CMS app and shared to the community you're working in. You can post content items individually, or group them into collections filtered by search parameters or topics. See Organizing Content on page 500.
- **Salesforce CRM** gives you access to your Salesforce objects, such as account or productitem. Choose which objects to enable for sharing. Org and object permissions associated with your objects still apply. See Add CRM Connections on page 501.
- **CMS Connect** lets you reuse HTML and JSON feeds from an external CMS source, such as blog posts, common headers, or images, removing the need to copy them into your community. See Connect Your External Content Management System to Your Community on page 525

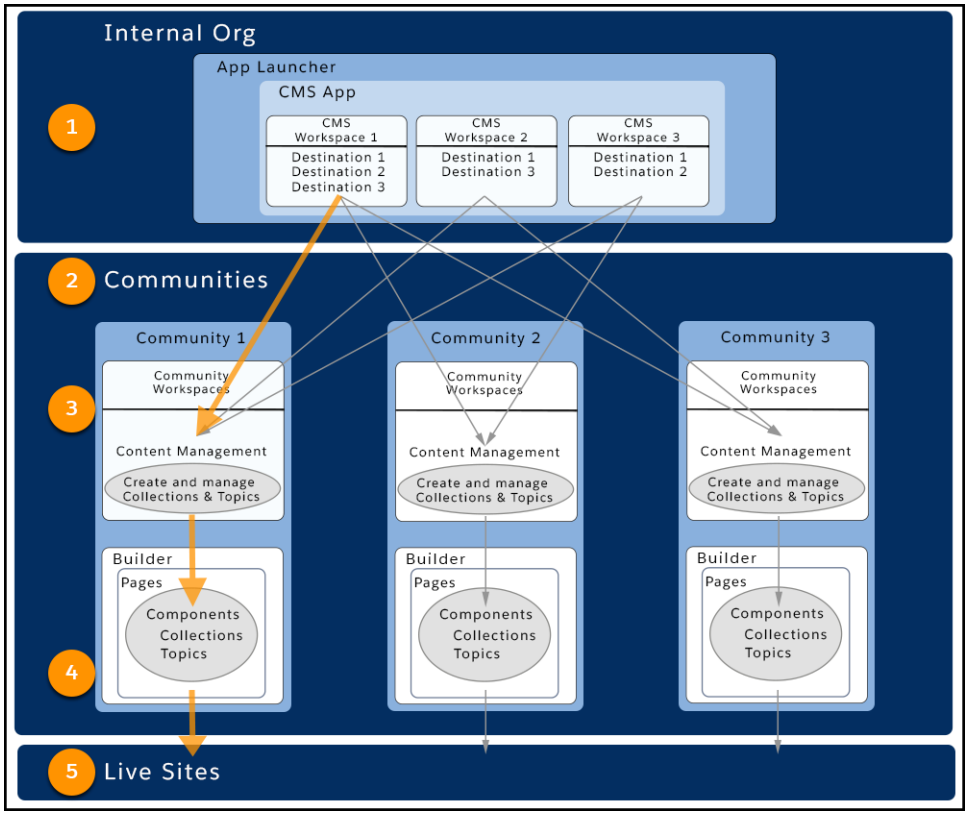
To organize and expose content easily and appropriately, use collections and topics.

- **Collections** let you create dynamic lists of related content or Salesforce CRM items through rules you define. Use collections as a content source in Community Builder to make your pages dynamic and keep them up-to-date without having to update the content manually. See Collections on page 502.

- **Topics** are an old friend with new power. Add topics to your CMS content for easy grouping and sorting for display. Help your customers discover related content when browsing your communities. See Set Up Content Topics on page 610

A Top-Down View of the Process

From an overall process perspective, content is created in your org (1) which is shared with one or more communities as destinations (2). You can organize and tag the content (3) and then add it to your community pages (4). The content is displayed to your users when the community is published (5).



IN THIS SECTION:

Start Using Salesforce CMS (Beta)

Salesforce CMS spans your Lightning communities to provide a central place for content creation and sharing, along with role-based access for contributors. Let's get you set up to start managing content and making the most of Salesforce CMS.

CMS Workspaces in Salesforce CMS (Beta)

CMS workspaces are the primary organizing and security principle in the Salesforce CMS app. Each CMS workspace consists of one or more destinations that share content created by one or more contributors to the workspace. Create CMS workspaces to differentiate internal and external information, different geographies, or even different campaigns. Workspaces also help limit access to the content.

Create Content in Salesforce CMS (Beta)

Create a post with just a few clicks in any CMS workspace. Content published in the Salesforce CMS app is shared with all destinations in that CMS workspace.

Organize Content in Salesforce CMS (Beta)

Salesforce CMS offers Collections and Topics to help you group and organize your content for easy use, and to keep your community up-to-date with the latest content automatically.

Add Your Salesforce CMS Content to Your Community (Beta)

Once you have created content, you must add it to your community so that your customers can see it.

SEE ALSO:

Organize Communities with Topics

Connect Your External Content Management System to Your Community

Content Security Policy in Lightning Communities

Control Chatter Access Through Permission Sets

Start Using Salesforce CMS (Beta)

USER PERMISSIONS	
To create content, CMS workspaces, or add contributors	Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup. AND Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.
To only create content in Salesforce CMS	Author assigned Content Manager role AND ensure that **Visible** is selected for Salesforce CMS in the user profile AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.
To create, customize, or publish a community	Create and Set Up Communities AND View Setup and Configuration AND is a member of the community

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce CMS spans your Lightning communities to provide a central place for content creation and sharing, along with role-based access for contributors. Let's get you set up to start managing content and making the most of Salesforce CMS.

Note: The content admin and content manager access roles are assigned in the Salesforce CMS app.

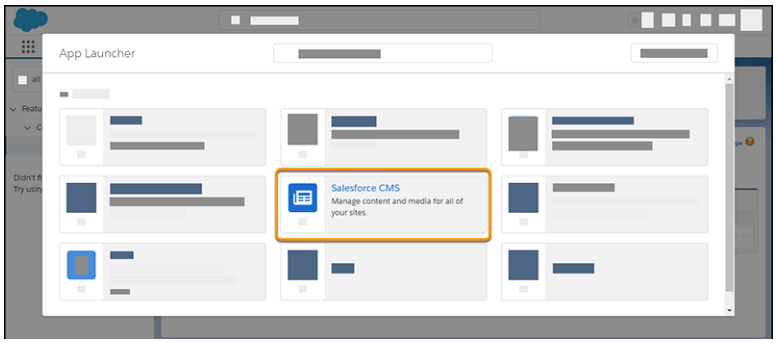
To start using Salesforce CMS with your Lightning communities:

- Ensure that your community is based on the most up-to-date Lightning template.
- Enable **Libraries in Salesforce Files** in **Setup** > **Salesforce Files** > **General Settings**.
- If you want to tag CMS content with a topic, in Community Workspaces, go to **Content Management** > **Topics** and enable the topic's **Enable for content** setting.

  Note: Although the Salesforce CMS app is available in sandbox orgs, you can't migrate CMS content to a production org. Therefore, we recommend using the CMS app in you production org to create content you want to use beyond testing.

Set up CMS workspaces which share the content you create in them with associated destinations. Content is curated and made live to your users on a community by community basis.

1. Open Salesforce CMS from the Salesforce App Launcher.



   Note: If you can't find the app, ensure that **Visible** is selected for Salesforce CMS in your user profile in Setup.

2. Create a CMS workspace on page 483, and specify which communities to share content with. Add contributors on page 487 to create and manage access to the content.
3. Create your content on page 493.
4. Add topics to the content and organize it on page 500 into collections in **Community Workspaces** > **Content Management**.

   Note: Content created in the Salesforce CMS app is available in the communities you added to its CMS workspace.

5. In Community Builder, add the content or collections on page 514 to components and publish it to your users.

If you run into issues, we've some tips to help you out.

- Issue: External users are unable to see your content.
  - Check your external sharing model. Confirm that the Default External Access column for the User object is set to **Public Read Only**. The "read only" setting turns User Sharing off for external users. See Set the Org-Wide Sharing Defaults for User Records.
  - Alternatively, enable **Portal User Visibility** or **Community User Visibility** as appropriate. See Controlling Who Community or Portal Users Can See.
- Issue: Guest users are unable to see CMS content.
  - Confirm Community (and relevant pages) have public access turned on for Guest User.

- Ensure **Let guest uses view asset files on public and login pages** is enabled under General in **Community Workspaces** > **Administration** > **Preferences**.
- To make the community available to the public, in Community Builder, go to **Settings** > **General** and enable **Public can access the community** under Public Access
- To make only a specific page public (if your community is private), in Community Builder, open the page's properties and select **Public** under Page Access.

– Confirm **View** access exists for approved Salesforce objects in the Guest User profile for Salesforce objects that are part of a collection.

SEE ALSO:

Create a CMS Workspace in Salesforce CMS (Beta)
Add Contributors to a CMS Workspace (Beta)
Add CMS Content in Salesforce CMS (Beta)
Organize Content in Salesforce CMS (Beta)
Add Your Salesforce CMS Content to Your Community (Beta)

CMS Workspaces in Salesforce CMS (Beta)

CMS workspaces are the primary organizing and security principle in the Salesforce CMS app. Each CMS workspace consists of one or more destinations that share content created by one or more contributors to the workspace. Create CMS workspaces to differentiate internal and external information, different geographies, or even different campaigns. Workspaces also help limit access to the content.

A destination or contributor can be in more than one workspace, but content and roles are unique to each workspace. Contributors are added to workspaces as either content admins or content managers.

Example: The following table shows what a sample company can do to keep internal content created by HR separate from marketing campaigns and other external content. Note that contributors can have different roles in different workspaces, such as the community admins role in Fall US campaign versus their role in Internal communications.

CMS Workspace Name	Shared To Destination (Communities)	Contributors (Users and Public Groups)
External communities	North America Europe	Salesforce admin Community admin (as content admin) Marketing writers (as content manager)
Fall US campaign	North America Company intranet	Salesforce admin Community admin (as content admin)

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

CMS Workspace Name	Shared To Destination (Communities)	Contributors (Users and Public Groups)
		Marketing writers (as content manager)
Internal communications	Company intranet US Company intranet EMEA	Salesforce admin Community admin (as content manager) HR (as content admin)

IN THIS SECTION:

Create a CMS Workspace in Salesforce CMS (Beta)

A CMS workspace is where you create, organize, and share content across destinations. Workspaces can define particular geographies or product lines or even something as ephemeral as campaigns. Workspaces are flexible so you use them to meet your particular goals.

Edit a CMS Workspace in Salesforce CMS (Beta)

You can update the name and description of a CMS workspace to help clarify its use and make it easier to find.

Add a Destination to a CMS Workspace (Beta)

Content published in a CMS workspace is shared to all the destinations associated with that workspace.

Role-Based Access in Salesforce CMS (Beta)

You can use role-based access to control who does what in each CMS workspace. Assign access roles to your contributors according to the level of access they need in a specific workspace.

SEE ALSO:

Role-Based Access in Salesforce CMS (Beta)

Create Content in Salesforce CMS (Beta)

Organize Content in Salesforce CMS (Beta)

Create a CMS Workspace in Salesforce CMS (Beta)

A CMS workspace is where you create, organize, and share content across destinations. Workspaces can define particular geographies or product lines or even something as ephemeral as campaigns. Workspaces are flexible so you use them to meet your particular goals.

1. Open Salesforce CMS from the Salesforce App Launcher.
2. Click **Add Workspace** and provide a name and description for the space.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

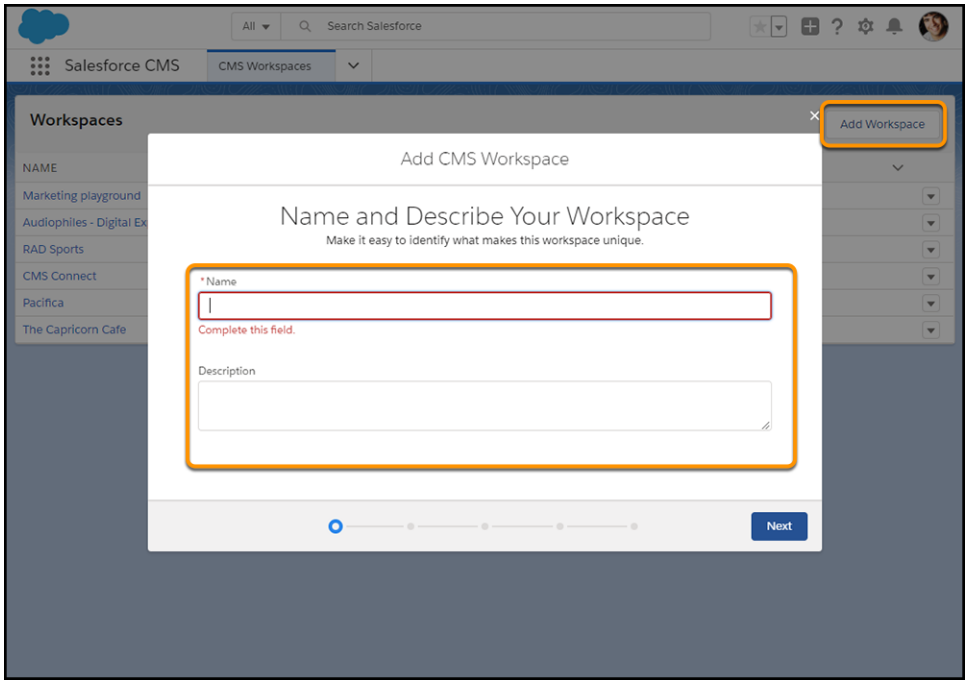
To create content, CMS workspaces, or add contributors

- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.



Note: If this is your first workspace, click **Create Your First CMS Workspace** and follow the prompts.

3. Add one or more destinations to the workspace by selecting available communities, or click **Skip** to add them later.
4. Select contributors from available users and public groups, click **Next**, and assign them one of the following roles.

   Content admin

   These contributors have access to all content in the CMS workspace and can manage contributors and content sharing.

   Note: If you used CMS for Community Cloud previously, as part of your migration to Salesforce CMS, we automatically assign a content admin role to existing Communities users who have "create and setup networks" permissions.

   Content manager

   These contributors have full access to all content in the CMS workspace.

   Note: If you click **Next** without selecting any contributors, you jump to the end of the wizard. By default, you're added as a Content admin to the workspace. You can add or change contributors and their roles later.

5. Click **Done**.

   Note: You can't delete CMS workspaces.

Open your workspace and click **Create Content**. Content is specific to a workspace, so only contributors in that workspace can access it for editing purposes. However, content in a workspace is shared with all community destinations associated with the workspace for publishing purposes.

SEE ALSO:

Create a CMS Workspace in Salesforce CMS (Beta)

Edit a CMS Workspace in Salesforce CMS (Beta)

Edit a CMS Workspace in Salesforce CMS (Beta)

You can update the name and description of a CMS workspace to help clarify its use and make it easier to find.

You can add destinations or change contributors or their roles in an existing CMS workspace. However, you can only edit the name and description of a workspace after it's created. You can't delete CMS workspaces.

1. Open Salesforce CMS from the Salesforce App Launcher.
2. Select the row action for the workspace you want to update and click **Edit**.
3. Edit the name and description and click **Save**.

SEE ALSO:

- Create a CMS Workspace in Salesforce CMS (Beta)
- Edit a CMS Workspace in Salesforce CMS (Beta)

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create content, CMS workspaces, or add contributors

- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.

Add a Destination to a CMS Workspace (Beta)

Content published in a CMS workspace is shared to all the destinations associated with that workspace.

Destinations can only be added to a CMS workspace. Once added, they can't be removed.

1. Open Salesforce CMS from the Salesforce App Launcher.
2. In CMS Workspaces, select the workspace that you want to add a destination to.
3. Click **Add Destination** to share content created in this workspace. Content in the workspace is shared with all destinations associated with the workspace.

Curate the content you shared in each community separately. In Community Workspaces, organize the content into collections or add topics to it as needed. Then, in Community Builder, add content to a component, either individually or as part of a collection, to make it discoverable by your users.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create content, CMS workspaces, or add contributors

- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.

Role-Based Access in Salesforce CMS (Beta)

You can use role-based access to control who does what in each CMS workspace. Assign access roles to your contributors according to the level of access they need in a specific workspace.

Contributors are users or public groups in your org that you add to your CMS workspace. Specify what these contributors can do and see within an assigned workspace by assigning them one of the following roles.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Content admin

These contributors have access to all content in the CMS workspace and can manage contributors and content sharing.

Note: If you used CMS for Community Cloud previously, as part of your migration to Salesforce CMS, we automatically assign a content admin role to existing Communities users who have "create and setup networks" permissions.

Content manager

These contributors have full access to all content in the CMS workspace.

In addition to the new roles, existing Salesforce admins have broad access to the Salesforce CMS app and your communities.

Salesforce admin

A Salesforce admin has full Salesforce CMS app access, control over all Communities settings, and can create communities.

IN THIS SECTION:

Add Contributors to a CMS Workspace (Beta)

In Salesforce CMS, you can add users or public groups as contributors to a specific CMS workspace by assigning them an access role. A contributor's access role is specific to a CMS workspace.

Change a Contributor's Access Role (Beta)

You can change a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to a CMS workspace, so you must change the contributor's role in each assigned workspace. Admins can't change their own role.

Remove a Contributor from a CMS Workspace (Beta)

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a CMS workspace. The user or public group is removed from the workspace but not from Salesforce.

Add Contributors to a CMS Workspace (Beta)

In Salesforce CMS, you can add users or public groups as contributors to a specific CMS workspace by assigning them an access role. A contributor's access role is specific to a CMS workspace.

1. In the App Launcher, select **Salesforce CMS**.
2. Go to CMS Workspaces and open a workspace.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create content, CMS workspaces, or add contributors

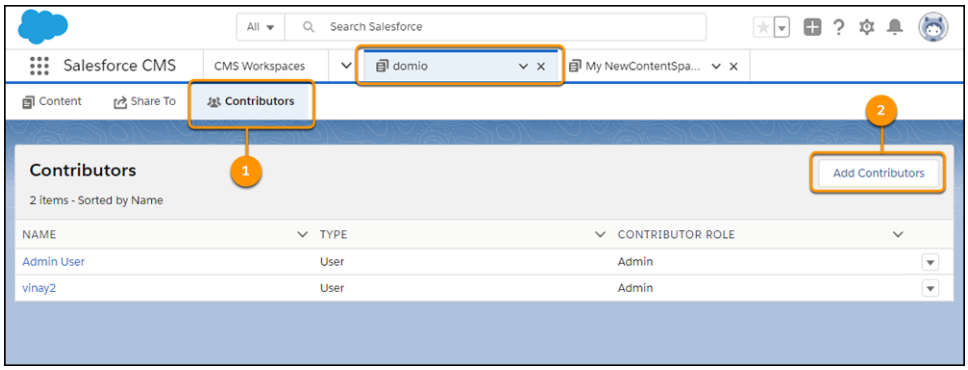
- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

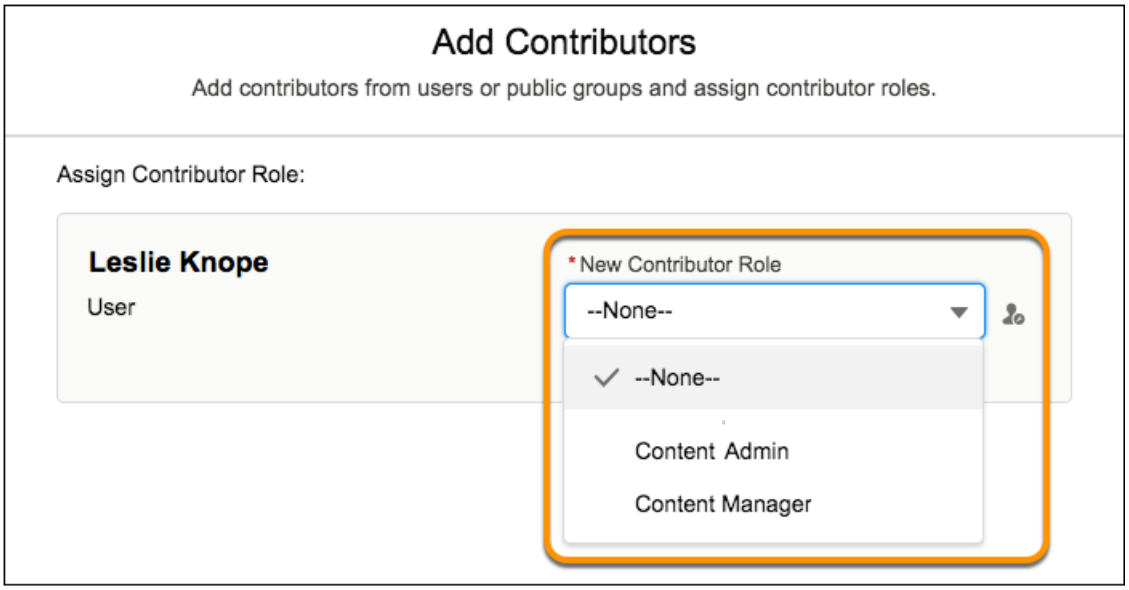
  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.

3. Open the **Contributors** tab (1) and click **Add Contributors** (2).



4. Search for users or public groups.
5. Next to the users or public groups that you want to add, click +.
6. Click **Next**.
7. For each user or public group, assign a contributor role.



Content admin

These contributors have access to all content in the CMS workspace and can manage contributors and content sharing.

Note: If you used CMS for Community Cloud previously, as part of your migration to Salesforce CMS, we automatically assign a content admin role to existing Communities users who have "create and setup networks" permissions.

Content manager

These contributors have full access to all content in the CMS workspace.

8. Click **Finish**.

Change a Contributor's Access Role (Beta)

You can change a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to a CMS workspace, so you must change the contributor's role in each assigned workspace. Admins can't change their own role.

1. In Salesforce CMS, go to CMS Workspaces and open the appropriate workspace.
2. On the Contributor's tab, next to the contributor you want to change, click and select **Change Role**.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

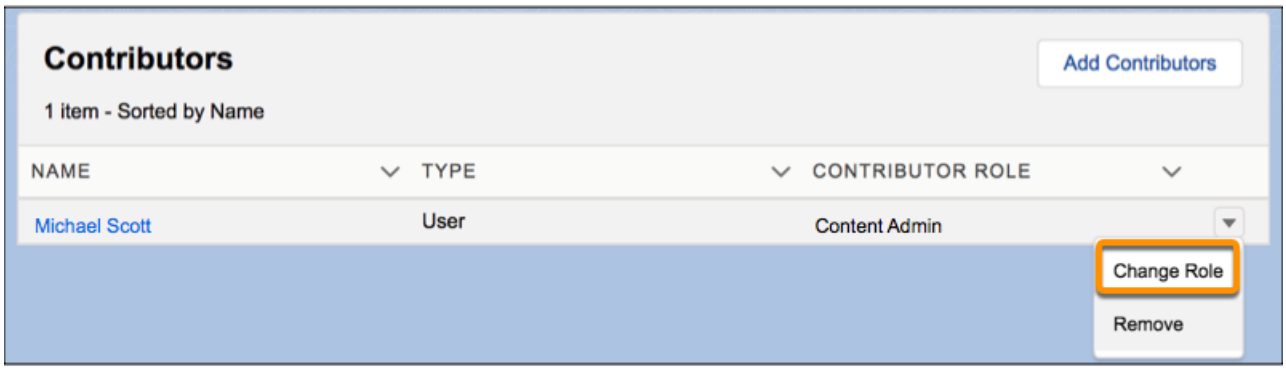
To create content, CMS workspaces, or add contributors

- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.



Note: To prevent you from accidentally removing your access to a workspace, you can't edit or remove your own contributor role. To change your level of access, another admin must update your role.

3. Select the new contributor role, and click **Update**.

Remove a Contributor from a CMS Workspace (Beta)

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a CMS workspace. The user or public group is removed from the workspace but not from Salesforce.

1. In Salesforce CMS, go to CMS Workspaces and open the appropriate workspace.
2. On the Contributors tab, click and select **Remove**.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

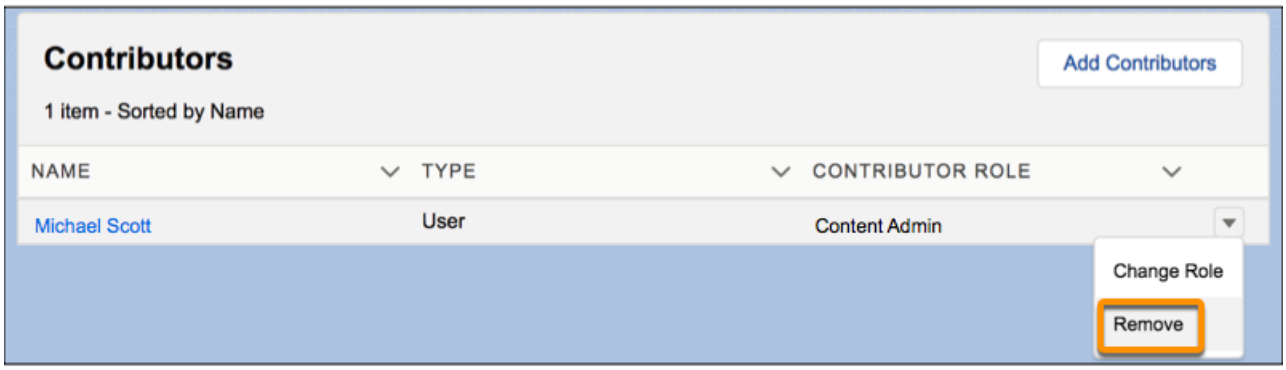
To create content, CMS workspaces, or add contributors

- Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup.

  AND

  Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile.

  Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.



Note: To prevent you from accidentally removing your access to a workspace, you can't edit or remove your own contributor role. To change your level of access, another admin must update your role.

After you remove a contributor from a CMS workspace, the contributor can no longer access that workspace.

Create Content in Salesforce CMS (Beta)

Create a post with just a few clicks in any CMS workspace. Content published in the Salesforce CMS app is shared with all destinations in that CMS workspace.

Original content is created in the Salesforce CMS app. Connecting to content, such as your Salesforce CRM data or external CMS systems is done in Content Management in Community Workspaces.

Note: In this release, you can experiment with Salesforce CMS in a sandbox, but the configuration and content can't be migrated to a production environment. Create content intended for release in your production environment to avoid having to recreate it later.

All content is curated in Community Workspaces, which is then made ready for release in Community Builder.

IN THIS SECTION:

Add CMS Content in Salesforce CMS (Beta)
CMS content is content authored and managed in the Salesforce CMS app.

Edit Content in Salesforce CMS (Beta)
Let's face it, things change, and editing your content is a way of life. Fortunately, editing content is easy in the Salesforce CMS app.

Unpublish Content in Salesforce CMS (Beta)
Unpublish CMS content to remove it from your community. Unpublishing content doesn't delete content, but rather archives it for later updating or use.

SEE ALSO:

Organize Content in Salesforce CMS (Beta)

Add Your Salesforce CMS Content to Your Community (Beta)

Role-Based Access in Salesforce CMS (Beta)

Connect Your External Content Management System to Your Community

Select a Script Security Level

Add CMS Content in Salesforce CMS (Beta)

USER PERMISSIONS	
To create content, CMS workspaces, or add contributors	Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup. AND Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.
To only create content in Salesforce CMS	Author assigned Content Manager role AND ensure that **Visible** is selected for Salesforce CMS in the user profile AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.

EDITIONS

Available in: Lightning Experience

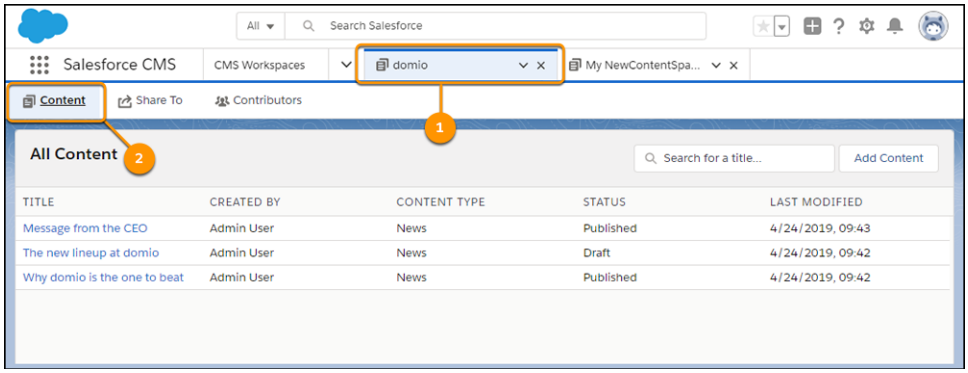
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

CMS content is content authored and managed in the Salesforce CMS app.

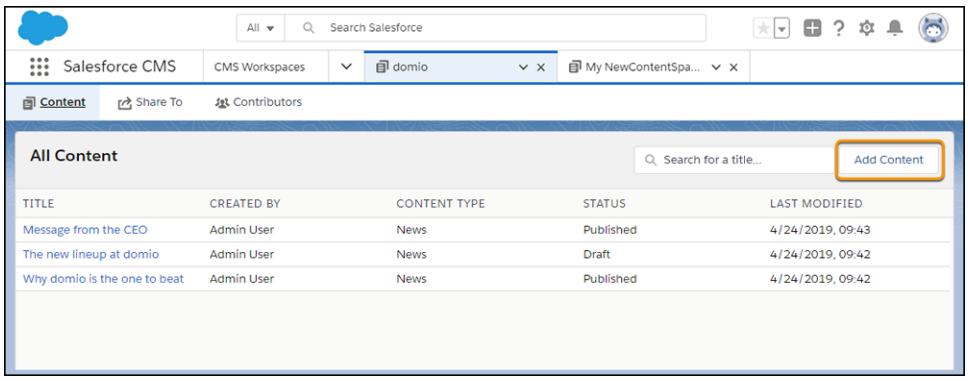
Content is unique for each CMS workspace and, once published, shared to every destination in that workspace.

Note: In this release, you can experiment with Salesforce CMS in a sandbox, but the configuration and content can't be migrated to a production environment. Create content intended for release in your production environment to avoid having to recreate it later.

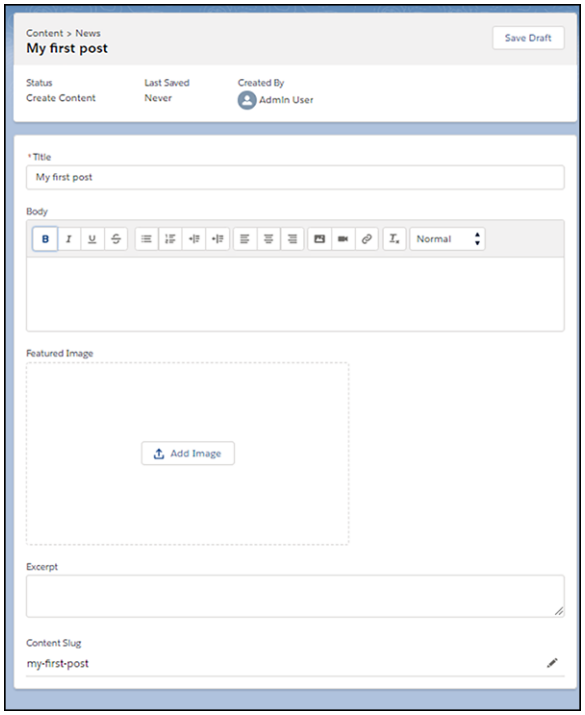
1. In the Salesforce CMS app, open the workspace (1) you want to add content to. Select **Content** (2) to open the list of existing content.



2. Click **Add Content** to create content for your workspace.



3. Click **Create Content** and fill in the fields. Each of the fields is used for mapping into any of the various layouts for your content when you add them to your site in Community Builder. Only the Title field is required. Click **Save Draft** when you're done.



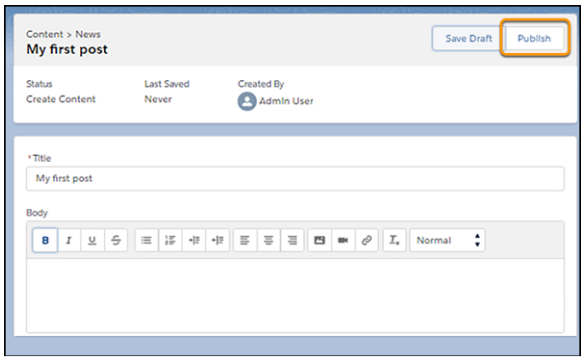
Links or connections to external resources, such as images, can cause alerts about security issues in your community, depending on your Content Security Policy (CSP) settings.

Note: A **Content Slug** is a friendly name, with no spaces, that is added to the base URL of your community to create an easy to remember, direct link to the content. Initially, the slug is based on the title of your content. However, it may not match your title exactly. You can edit the content slug to adjust the result.

Saving your content as a draft adds it to your workspace for safekeeping, but doesn't make it available to any destinations.

4. Now that your content is safe as a draft, it's time to make it available for use.

   Click **Publish** to make the content available for collections and for individual placement on a page in your community.



When content is published, a detail page of that content is created, using the News Detail page, in every destination that is associated with the workspace. The page remains on your community until it is unpublished or archived. CMS Content cannot be deleted once it has been saved or published.

Note: Whether or not content is in a collection or part of a component, the detail page is available to anyone with the page ID or URL.

SEE ALSO:

Content Security Policy in Lightning Communities

Edit Content in Salesforce CMS (Beta)

USER PERMISSIONS	
To create content, CMS workspaces, or add contributors	Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup. AND Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.
To only create content in Salesforce CMS	Author assigned Content Manager role AND ensure that **Visible** is selected for Salesforce CMS in the user profile AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected

EDITIONS

Available in: Lightning Experience

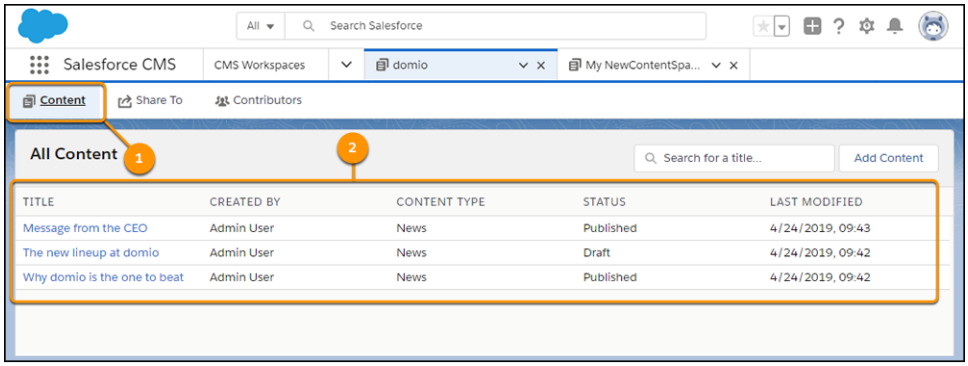
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

in the system permissions of the user profile.

Let's face it, things change, and editing your content is a way of life. Fortunately, editing content is easy in the Salesforce CMS app.

CMS content, whether published, live, or in draft, is easy to edit without changing what's live on your community.

1. On the Content page (1), click the title of content you want to edit.(2).



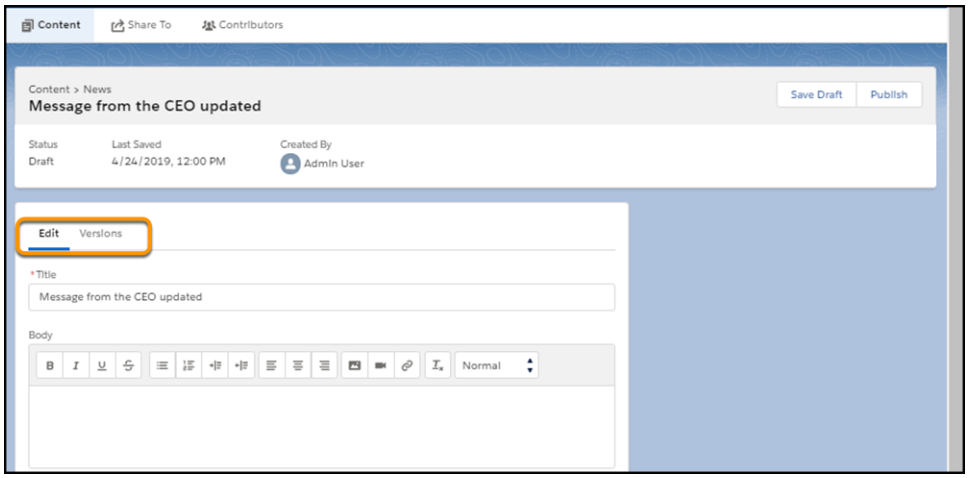
2. You see slightly different options depending on whether the content is published or not.

   For content that has yet to be published, you can choose to **Save Draft**, or to **Publish** the changes. Saving the draft maintains your current updates, but doesn't make them available. Publishing the changes updates the content database with your current version and makes it available for inclusion in your communities.

   For content that is already published and shared to your destinations, edit the existing material as a new copy by clicking **Edit as Draft**. Editing this way doesn't affect the previously published version of the material until you choose to republish it.

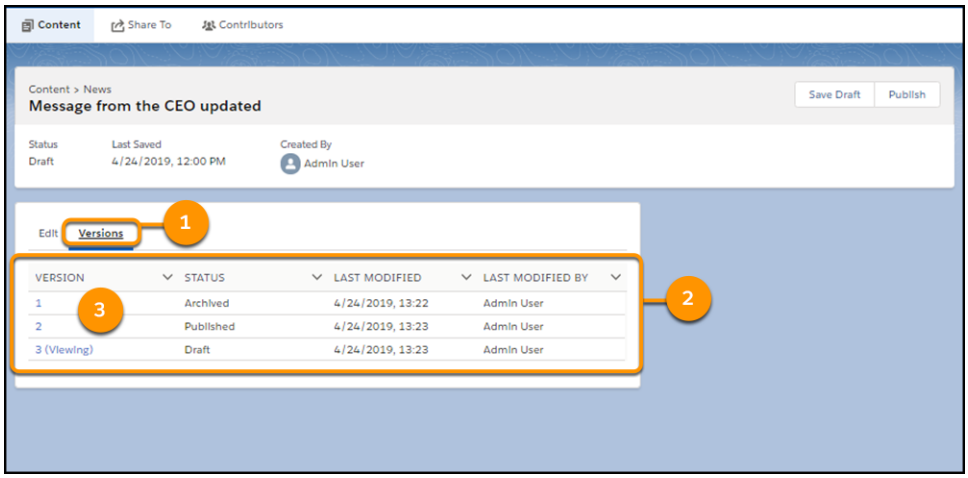
   Note: When you publish your content after updating it, all components, in all destinations, that currently use it will update immediately.

3. Once you've saved your content, you have multiple versions available to view.



   Click **Versions** (1) to see the available iterations of your content. There are three status possibilities: archives, draft, or published. You have only one draft or published version at any given time, but you can have many archived versions. The version currently open in

your content form is labeled **Viewing**. To view a particular iteration of the content, click the version number (3). Depending on its status you can review, copy, edit, publish, or unpublish the content.



Unpublish Content in Salesforce CMS (Beta)

USER PERMISSIONS	
To create content, CMS workspaces, or add contributors	Content Admin or Salesforce admin AND ensure that **Visible** is selected for Salesforce CMS in the user profile in Setup. AND Create Content Workspace administrative permissions must be selected AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.
To only create content in Salesforce CMS	Author assigned Content Manager role AND ensure that **Visible** is selected for Salesforce CMS in the user profile AND Access Libraries must be selected in the system permissions of the user profile. Note: If your org is profile-based, Enable Chatter must also be selected in the system permissions of the user profile.

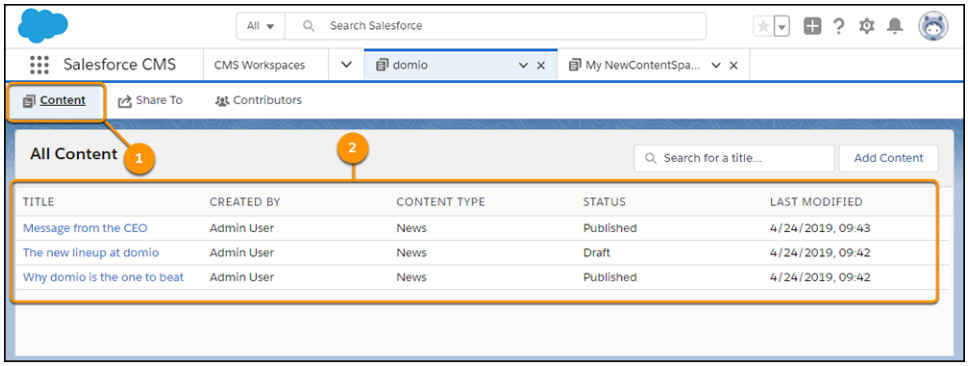
EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

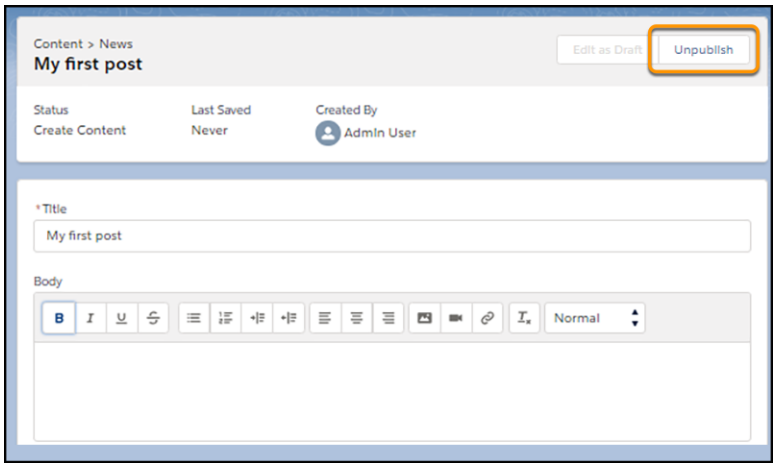
Unpublish CMS content to remove it from your community. Unpublishing content doesn't delete content, but rather archives it for later updating or use.

1. Find the material you want to unpublish on the Content page (1) and click its title (2).



Note: You can see which pieces of content are published by looking at the Status column.

2. Open the content and click **Unpublish**.



Note: When you unpublish a piece of content, it no longer appears in your community, and it's unavailable for use in any components in Community Builder. If the content was used in a CMS Single Item component, rather than as part of collection, the component appears as a blank space or with an error message on your community. To correct the issue, remove the component or add different content. If it's part of a collection, the content no longer appears as part of the collection results.

Organize Content in Salesforce CMS (Beta)

Salesforce CMS offers Collections and Topics to help you group and organize your content for easy use, and to keep your community up-to-date with the latest content automatically.

Collections organize your content and automatically update, making targeted, discreet chunks of content available to components in Community Builder. Every item in a collection shares a common layout in the component you attach it to, so that you only have to set up once.

Note: In addition to creating material and using Salesforce CRM data, you can also set up CMS Connect to reuse content external to your community. While powerful, external links can have Content Security Policy (CSP) issues, so plan accordingly.

Note: Salesforce CRM data must be added to a collection before you can add it to a component in Community Builder.

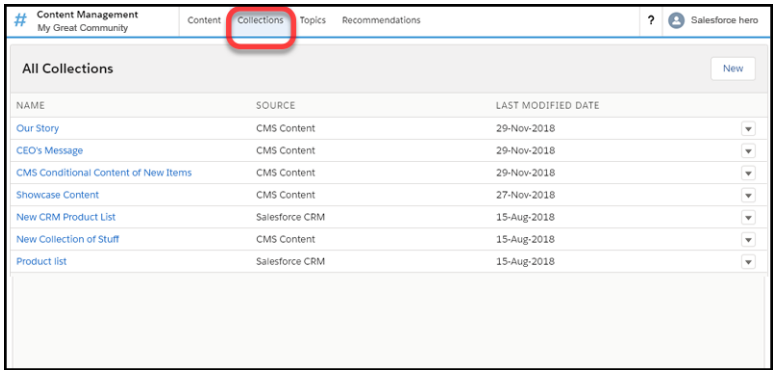
EDITIONS

Available in: Lightning Experience

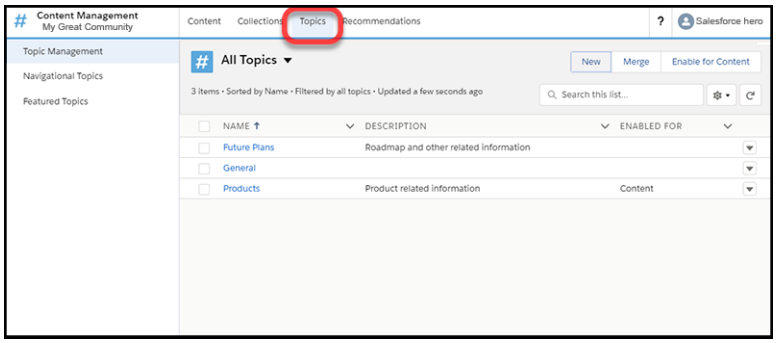
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Collections and topics are both available in the Content Management workspace.

Collections can be created manually or can gather content automatically using filters or criteria that you select. Once created, your collections constantly evaluate new content that gets added to your CRM data or CMS content for inclusion.



Topics are probably already familiar to you from Chatter and other areas of Salesforce. Essentially, they mark your content so it can be easily identified as part of a common idea.



IN THIS SECTION:

Add CRM Connections in Salesforce CMS (Beta)

Expose the Salesforce CRM data you want in your community with just a couple of clicks.

Collections in Salesforce CMS (Beta)

Collections make it easy to organize and pull together pools of changing content. Collections results are always current because they are defined as filtered searches of your CMS content and Salesforce CRM data.

Topics in Salesforce CMS (Beta)

Topics can be used to organize your content, just as they help you manage your community's feeds.

SEE ALSO:

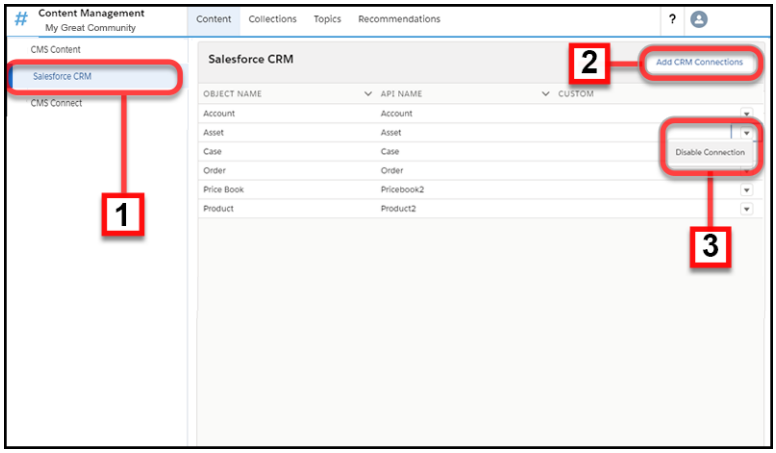
- Add CMS Content in Salesforce CMS (Beta)
- Add CRM Connections in Salesforce CMS (Beta)
- Add Your Salesforce CMS Content to Your Community (Beta)

Add CRM Connections in Salesforce CMS (Beta)

Expose the Salesforce CRM data you want in your community with just a couple of clicks.

Select **Salesforce CRM** (1) to open the list of objects from your org. Objects must be explicitly approved, or whitelisted, to make their data available in your community. Add objects by clicking **Add CRM Connections** (2). To disable existing connections, select **Disable Connection** from the row menu (3).

Note: Only objects that support list views are available. Only fields in global list views can be used for display in your community.



1. Click **Add CRM Connections** (1) to open the CRM Connections dialog (2).

EDITIONS

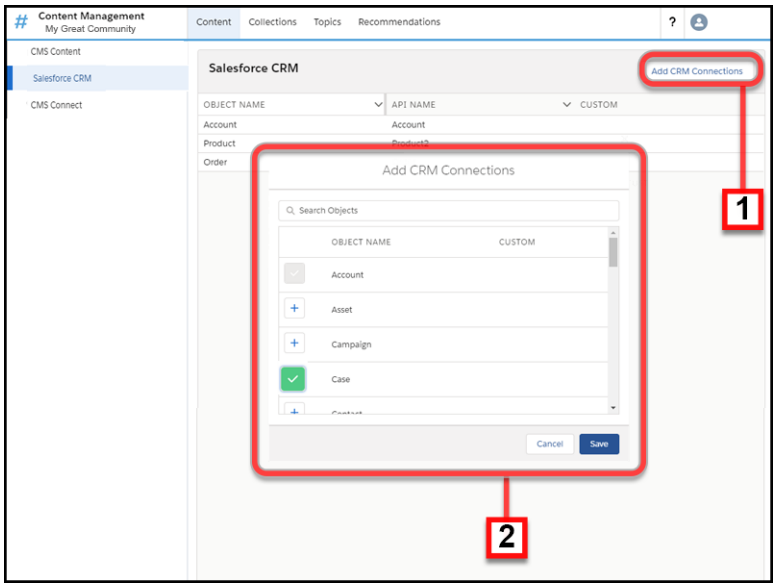
Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community

- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community



2. Select one or more objects to use in your community.

   Tip: Use Search to find an object you don't see (or that's way down the list of available objects).

Button	Description
+	Click to add a connection to the CRM object.
✓	Connection to CRM object is already selected to add during this session. Click to deselect the object.
✓	The object is already approved and connected for your community. You can disable a connection in the Salesforce CRM approved objects list.

   Note: Objects retain their permissions when used in communities. Don't worry about exposing information to anyone who shouldn't be able to see it already.

3. Click **Save**.

To display CRM content to your users, add an approved connection to a collection. Create a collection in the Content Management workspace.

Collections in Salesforce CMS (Beta)

Collections make it easy to organize and pull together pools of changing content. Collections results are always current because they are defined as filtered searches of your CMS content and Salesforce CRM data.

CMS Content collections are the filtered results of the content shared with your community from the Salesforce CMS app. Salesforce CRM collections are the filtered results of existing global views of your connected Salesforce objects.

- Manual collections don't change unless you specifically add or remove content from them.

EDITIONS

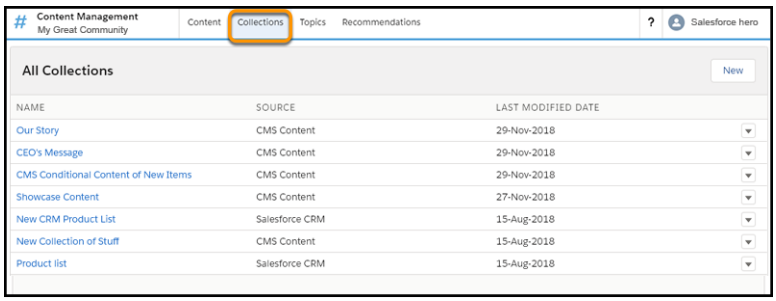
Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Conditional collections set up filters to dynamically select from the available content at any given time. For instance, you could create a collection that automatically selects new products for the month, rather than manually creating collections each month.
- CRM collections are automatically updated based on the data in your Salesforce org. As you add records, collections connected to that object automatically include them.

Note: You can use CMS content as individual items in your community. However, Salesforce CRM content can only be used as part of collections in your community.

In the Content Management workspace of your community, the Collections page lists all of your existing collections and the options to manage them.



After you create collections, you can use them to populate CMS Collection components in Community Builder. Any new or updated content that meets the criteria you set displays automatically.

IN THIS SECTION:

Create CMS Content Collections Manually (Beta)

Make hand-picked, static collections in just a few clicks by selecting specific content.

Create CMS Content Collections Automatically (Beta)

Make collections by creating filters that automatically include content that meets the criteria you define. Combine several layers of filters to achieve complex and targeted results.

Create Salesforce CRM Collections for Salesforce CMS (Beta)

Make collections of your existing CRM data by selecting global list views of approved objects.

Manage Collections in Salesforce CMS (Beta)

You'll quickly build up a large list of collections to serve various needs in your community. We've given you a central page to manage them in Content Management.

SEE ALSO:

Add CMS Content in Salesforce CMS (Beta)

Add CRM Connections in Salesforce CMS (Beta)

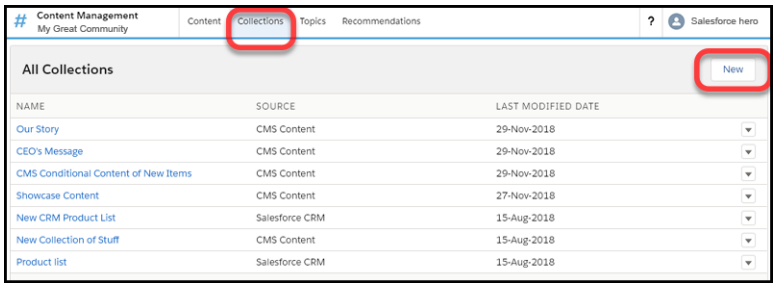
Add Your Salesforce CMS Content to Your Community (Beta)

Create CMS Content Collections Manually (Beta)

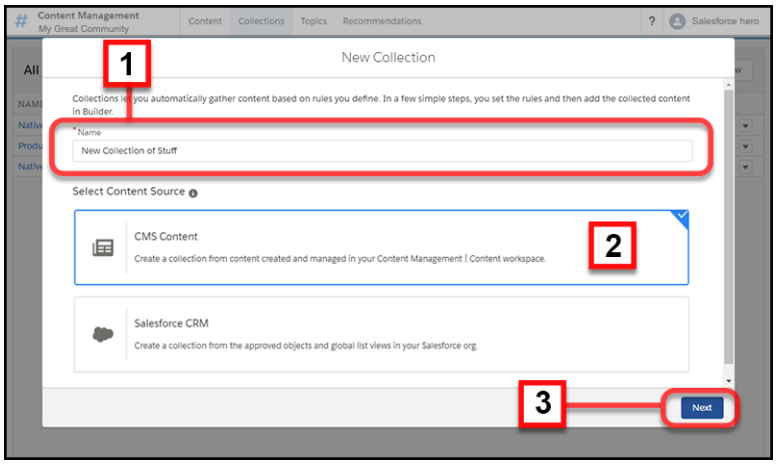
Make hand-picked, static collections in just a few clicks by selecting specific content.

Managing and curating content isn't always done in a straight line. For instance, you may know that several posts are going to be written on a subject before they are available, or that new company information is forthcoming. You can create collections of CMS content before any content exists in Salesforce CMS so that everyone can do their jobs more flexibly.

1. In the Content Management workspace of your community, select **Collections** and click **New**.



2. In the New Collection window, enter a descriptive name for the collection (1), select **CMS Content** (2), and click **Next** (3).



Tip: The Collections detail page doesn't show the criteria that make up the collection. The more descriptive you make the collection name, the easier it is to locate.

3. To create a static collection of specific content, select **Manually**.

EDITIONS

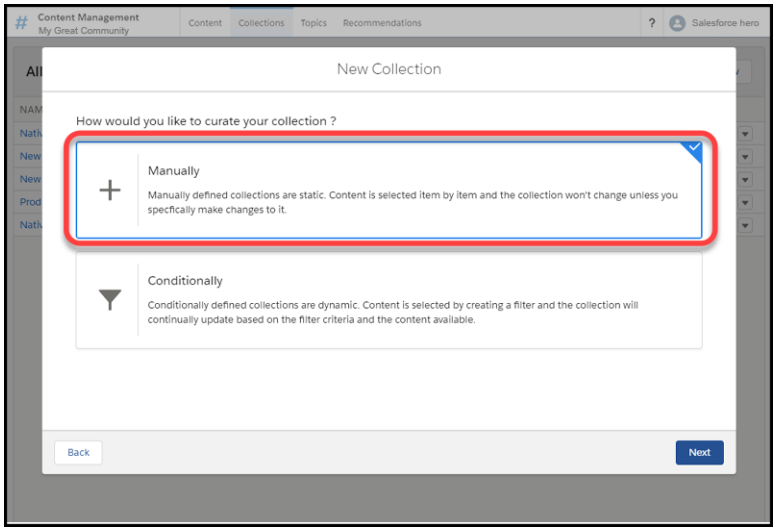
Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

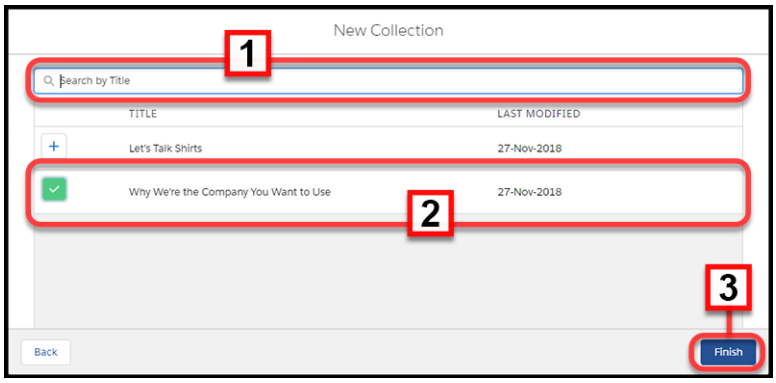
USER PERMISSIONS

To create, customize, or publish a community

- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community



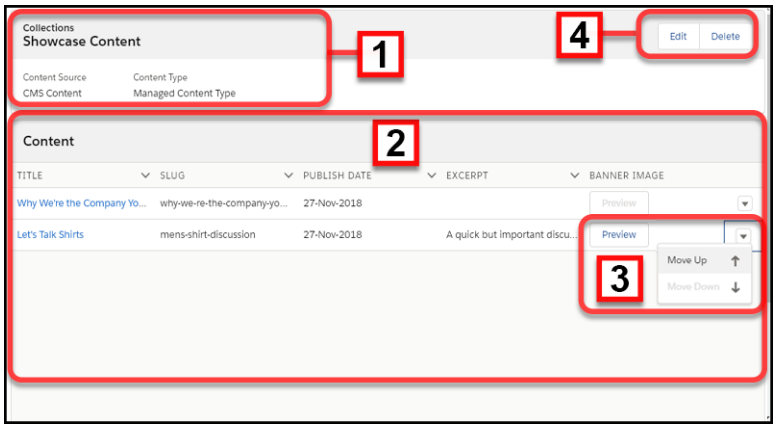
4. Locate the content that you want to add and click + beside content items to add them.



5. Click **Finish**.
   Your collection list is the result of what you selected and the order that items appeared in the list, but you can reorder them .

Once created, or to edit a manual collection, open it from your collections list to review it and click **Edit** (4).

The title, source type, and content type (1) of your collection help provide context to your list when you're working with many collections. The content (2) is listed in the order the content is displayed on your site. Change the order by moving items up or down (3). You can also **Preview** images associated with the item. If you want to remove the collection, click **Delete** (4).



Note: **Preview** isn't active if you didn't add an image to the Featured Image field of your CMS content.

SEE ALSO:

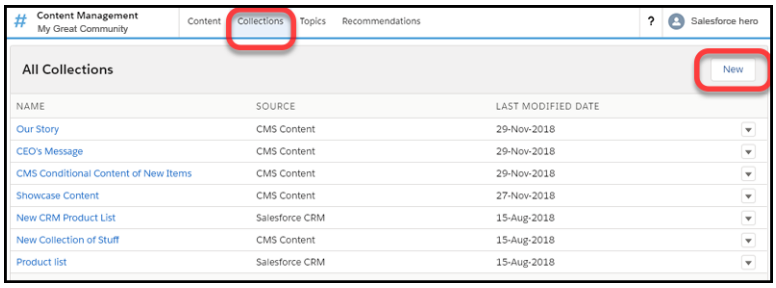
- Add CMS Content in Salesforce CMS (Beta)
- Create Salesforce CRM Collections for Salesforce CMS (Beta)
- *Salesforce Help:* Relative Date Filter Reference
- *Developer Guide:* Comparison Operators
- *Developer Guide:* Logical Operators

Create CMS Content Collections Automatically (Beta)

Make collections by creating filters that automatically include content that meets the criteria you define. Combine several layers of filters to achieve complex and targeted results.

Managing and curating content isn't always done in a straight line. For instance, you may know that several posts are going to be written on a subject before they are available, or that new company information is forthcoming. You can create collections of CMS content before any content exists in Salesforce CMS so that everyone can do their jobs more flexibly.

1. In the Content Management workspace of your community, select **Collections** and click **New**.



2. In the New Collection dialog, enter a descriptive name for your collection (1). Being descriptive now saves you confusion later. The Collections page shows the source of the content (CMS Content or Salesforce CRM), but not the criteria that make up the collection. Once you have a name, select the CMS Content option (2) and click **Next** (3).

EDITIONS

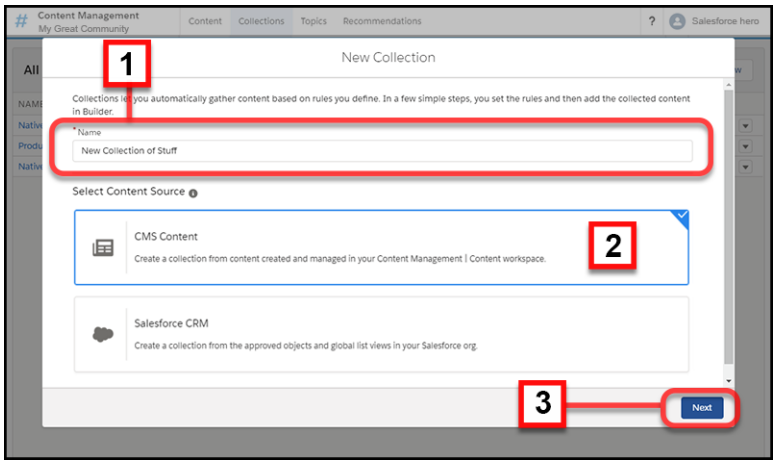
Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

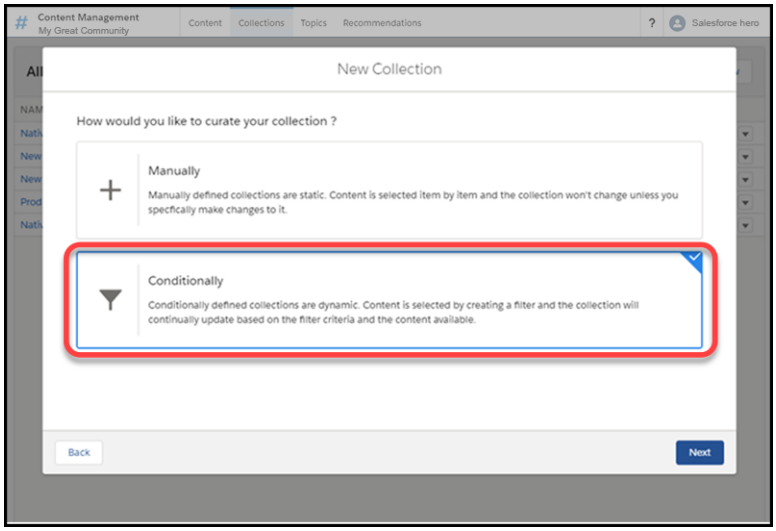
USER PERMISSIONS

To create, customize, or publish a community

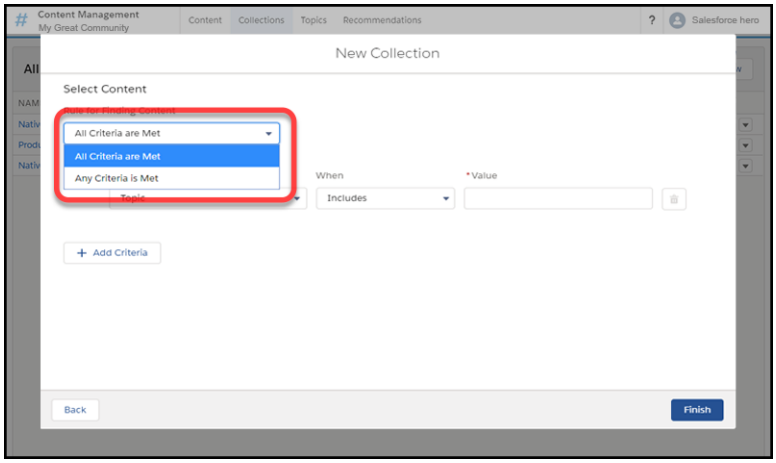
- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community



3. You can choose whether to have your collection maintained manually or to have it dynamically update conditionally. For a dynamic content collection that updates automatically based on criteria you set, select **Conditionally**.

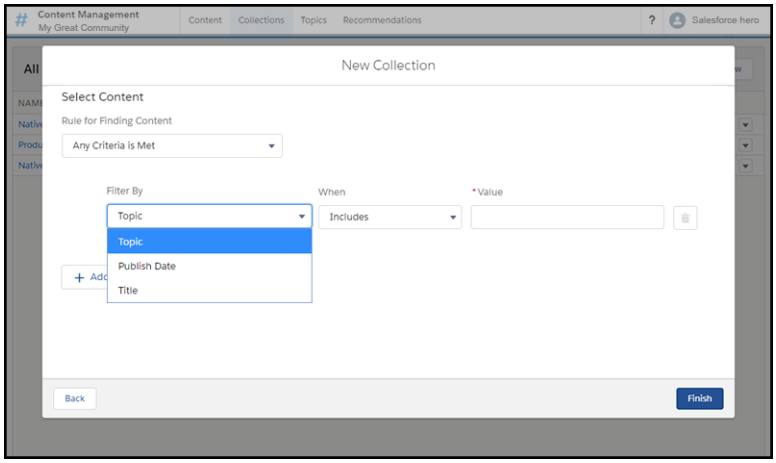


4. Choose whether you want the results of your rules to meet all criteria or just some of them to be included in the results.



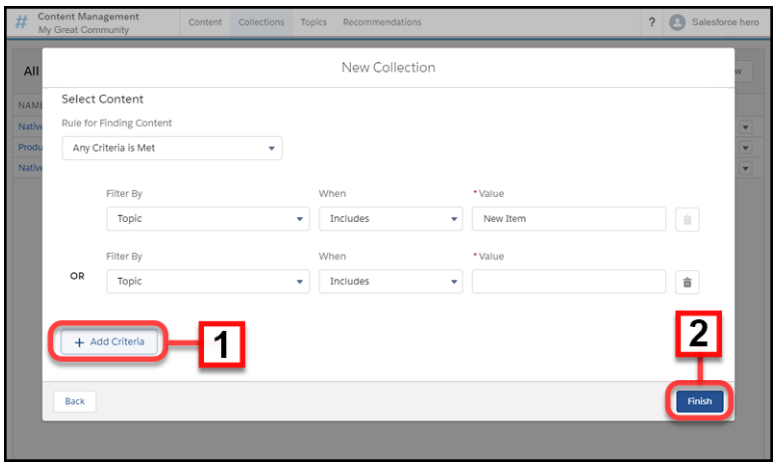
- **All Criteria are Met** treats all of your rules as ANDs, adding them together to evaluate selections.
- **Any Criteria is Met** treats your rules as ORs, allowing any piece of content that meets any one of the rules to be included in the results.

5. Create a filter by first selecting a filter type, an appropriate operator, and the value to compare against.



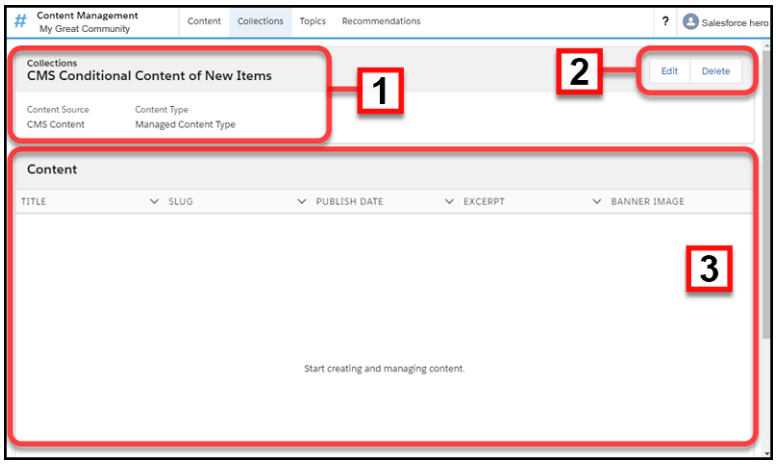
Filter type	Description
Topic	Has a single operator, **Includes**, that searches for CMS content tagged with the topic listed in the value field. When adding more than one topic, separate them with commas. Note: For any given collection, you can only have one topic filter with up to 1000 characters defining it.
Publish Date	Has multiple operators that evaluate against the most recent publish date of available CMS content. Values can be entered as region-specific numeric dates or as date literals, such as Today, Last Week, etc. See Relative Date Filter Reference.
Title	Has two operators that evaluate against the Title field of your available CMS content for an exact (**Equals**) or partial match (**Contains**).

6. If needed, click **+ Add Criteria** (1) to create additional filters to further refine your collection. You can use up to a total of 10 filters to define a collection.



Create the collection and see your results by clicking **Finish** (2).

7. What appears in your collection list is the result of the filters and your available content. The title, source type, and content type (1) of your collection help provide context to your list when you're working with many collections. If you aren't seeing what you expect (3), as in this example where no content resulted (hey, it happens), **Edit** the filters or title of the list or even **Delete** (2) it and start over.



SEE ALSO:

Add CMS Content in Salesforce CMS (Beta)

Create Salesforce CRM Collections for Salesforce CMS (Beta)

Salesforce Help: Relative Date Filter Reference

Developer Guide: Comparison Operators

Developer Guide: Logical Operators

Create Salesforce CRM Collections for Salesforce CMS (Beta)

Make collections of your existing CRM data by selecting global list views of approved objects.

To create collections of Salesforce CRM content, first ensure that connections to your objects are approved.

Tip: Managing and curating content isn't always done in a straight line. For instance, you may know that new records will be added to your org before they are available. A good example of this is new records in productitems or accounts. You can create Salesforce CRM collections before those records exist, as long as the object connection is available. The content will automatically populate your collection when it has been added to your internal org.

EDITIONS

Available in: Lightning Experience

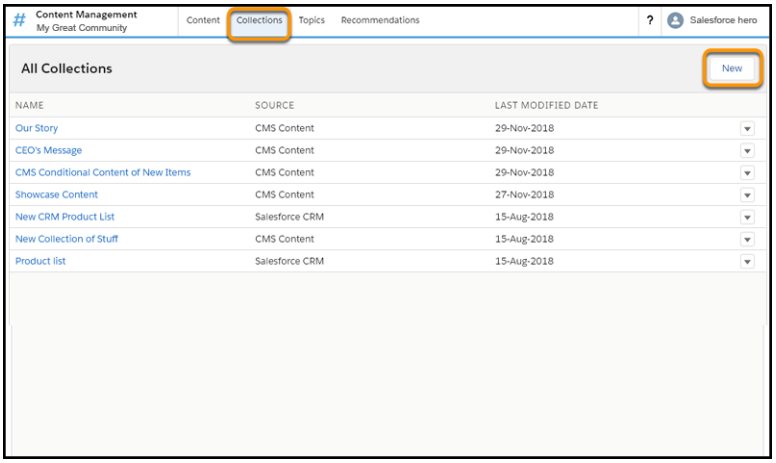
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

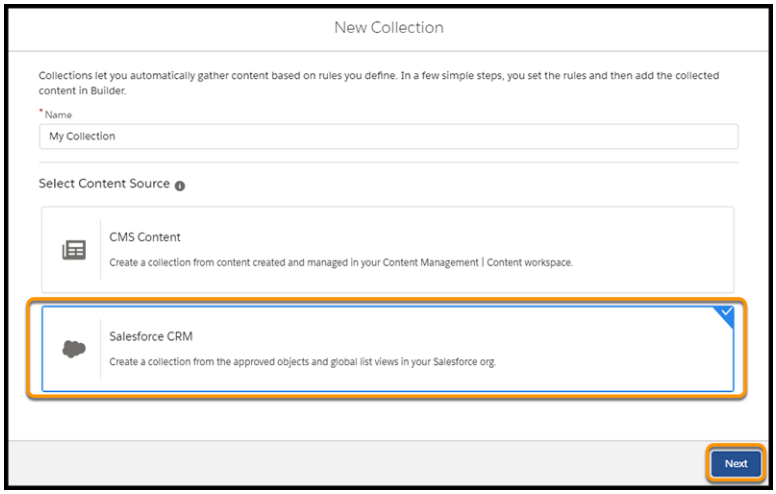
To create, customize, or publish a community

- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community

1. In the Content Management workspace of your community, **Collections** and click **New**.

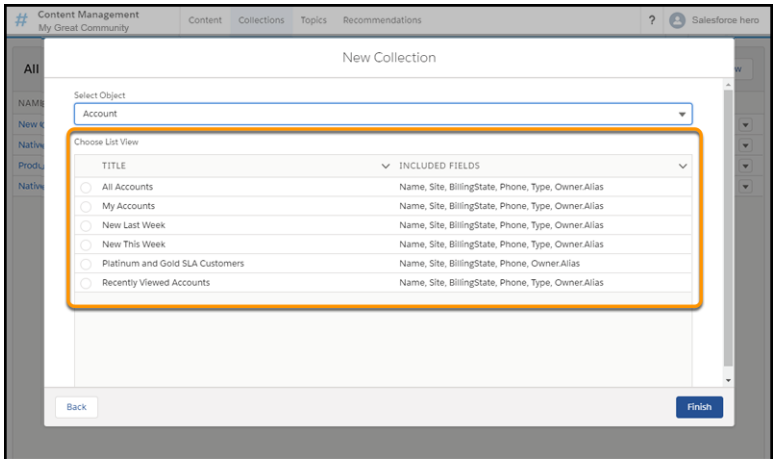


2. In the New Collection window, enter a descriptive name for your collection, select **Salesforce CRM**, and click **Next**.



Tip: The Collections detail page doesn't show the criteria that make up the collection. The more descriptive you make the collection name, the easier it is to locate.

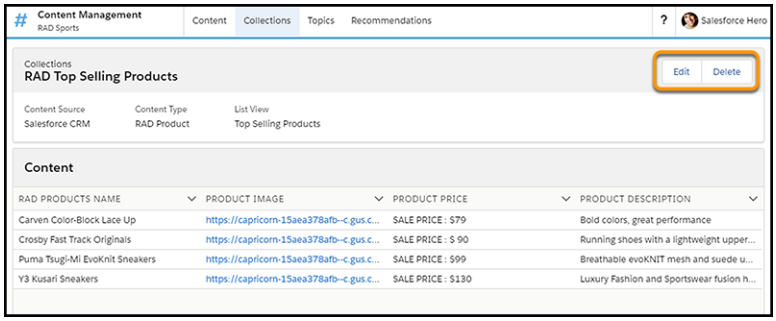
3. Select an approved object from your Salesforce CRM and then select a global list view.



Only global list views are available for creating collections. All fields in a list view are available for display when that view is added as a content source in Community Builder. You can adjust the layout to include or exclude certain fields.

Tip: To create a more visual collection with images as the primary focus, make sure that your list view has an image URL.

4. Click **Finish**.
   What appears in your collection list is the data and fields from the view you selected. If you aren't seeing what you expect, **Edit** the collection to choose a different view or **Delete** it and start over.



SEE ALSO:

Create CMS Content Collections Automatically (Beta)

Create CMS Content Collections Manually (Beta)

Manage Collections in Salesforce CMS (Beta)

You'll quickly build up a large list of collections to serve various needs in your community. We've given you a central page to manage them in Content Management.

EDITIONS

Available in: Lightning Experience

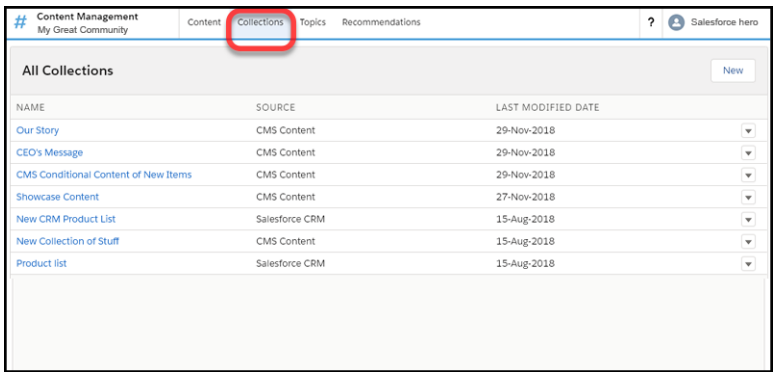
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community

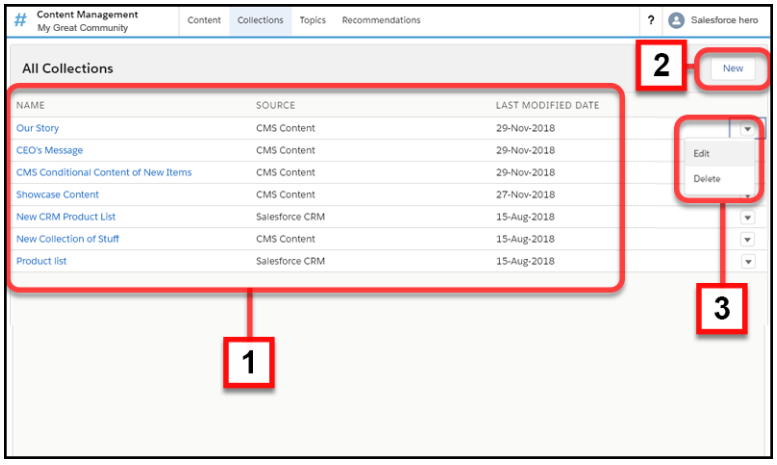
- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community

1. Select **Collections** in the Content Management workspace.



Note: Collections are ordered in reverse chronology, with the most recently modified collections first.

2. Review your list of collections (1), identified by their title, source of content, and the last modified date. Create a collection (2). Or choose to edit or delete (3) specific collections from the row-level menu.



You can review or edit a collection by clicking its title.

SEE ALSO:

- Create CMS Content Collections Automatically (Beta)
- Create CMS Content Collections Manually (Beta)
- Create Salesforce CRM Collections for Salesforce CMS (Beta)

Topics in Salesforce CMS (Beta)

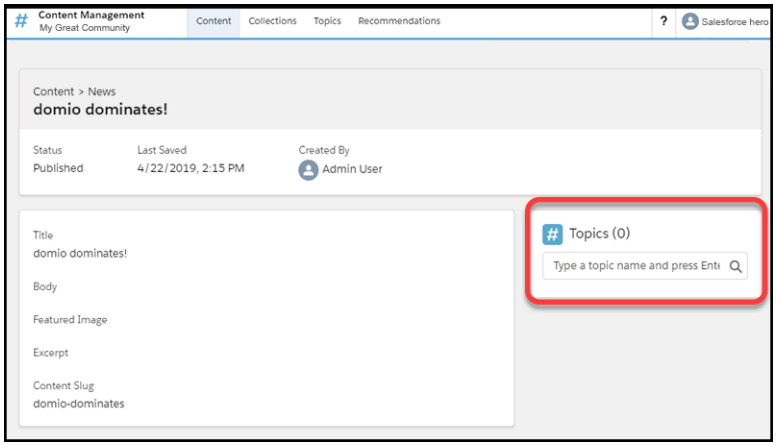
Topics can be used to organize your content, just as they help you manage your community's feeds.

Assign content topics to CMS Content when reviewing it in the Content Management workspace of your community.

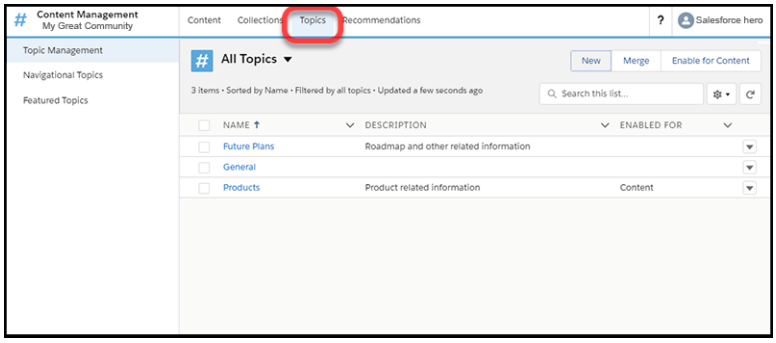
EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Review and manage your topics from the Topics page.



Note: For a topic to be available for use in Salesforce CMS, it must be **Enabled for Content**.

SEE ALSO:

- Organize Communities with Topics
- Organize Communities with Topics
- Set Up Content Topics (Beta)

Add Your Salesforce CMS Content to Your Community (Beta)

Once you have created content, you must add it to your community so that your customers can see it.

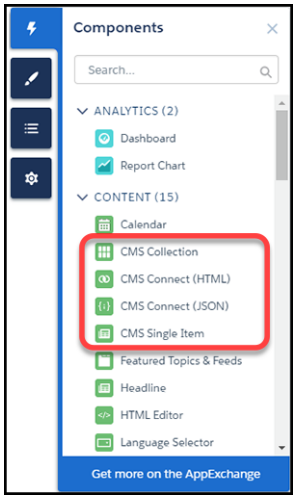
Content is added and made live in a few simple steps.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

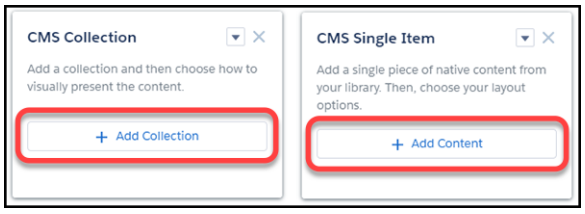
1. Select and add one of the CMS components to a page in your community.



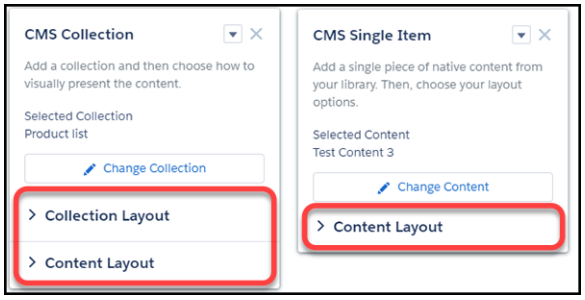
- CMS Content can be added as a single item or as part of a collection.
- Salesforce CRM data can only be added as part of a collection, which uses global views to filter the content for display.

  Note: Object permission settings from your org carry forward into the community. If a customer doesn't have the appropriate permissions to see certain content, it won't be displayed to them.

2. Select the content you want to display as a source for the component.



3. After you've selected your content, you can choose how to present it by defining the layout. Each component has several layout options. For a single item, it is similar to formatting a document. For a collection, you are essentially creating a template to pour the content into.



4. Finally, publish your community to make the content live.

   Note: Updates to previously published pieces of content go live immediately. There is no need to add them to a component again or republish your site.

IN THIS SECTION:

Add Single Items from Salesforce CMS to Your Community (Beta)

Sometimes all you need is a single item to meet your purpose, like a corporate statement or internal guidance. In that case, you can use the CMS Single Item component to display the specific CMS Content to make your point.

Add Salesforce CMS Collections to Your Community (Beta)

Once you've created a collection in Content Management, you have to associate it with an instance of the CMS Collection component in Community Builder so people can see the information.

Configure the Detail Page for Salesforce CMS Content (Beta)

The News Detail page is a pre-configured detail page for content displayed in the CMS Single Item component.

SEE ALSO:

Role-Based Access in Salesforce CMS (Beta)

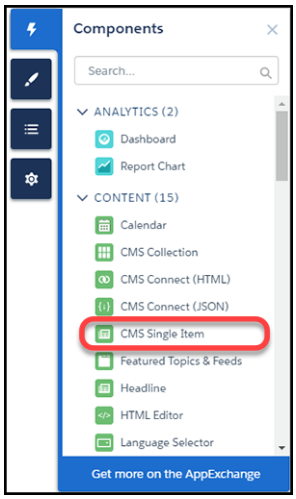
Add Single Items from Salesforce CMS to Your Community (Beta)

Sometimes all you need is a single item to meet your purpose, like a corporate statement or internal guidance. In that case, you can use the CMS Single Item component to display the specific CMS Content to make your point.

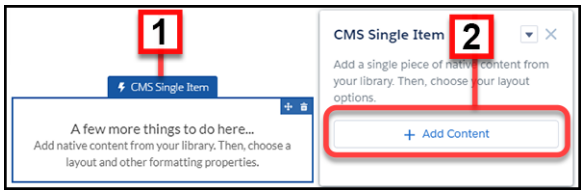
The CMS Single Item component can be added to a page multiple times. You can add a component to your community without a content source, but until content is associated with the component, you won't have access to the layout options. You can only add content that has been created in the Salesforce CMS app using the content form.

Note: If you have a published piece of content and also have a draft version, the latest **published** version is what is available to select.

1. Open Community Builder.
2. Select and drag the **CMS Single Item** component to your page.



3. Click the component (1) to open the options menu. Then click **+ Add Content** (2) to select a piece of available CMS content as your source.



4. From the available content (content that has been published), select the source (1) and click **Save** (2).

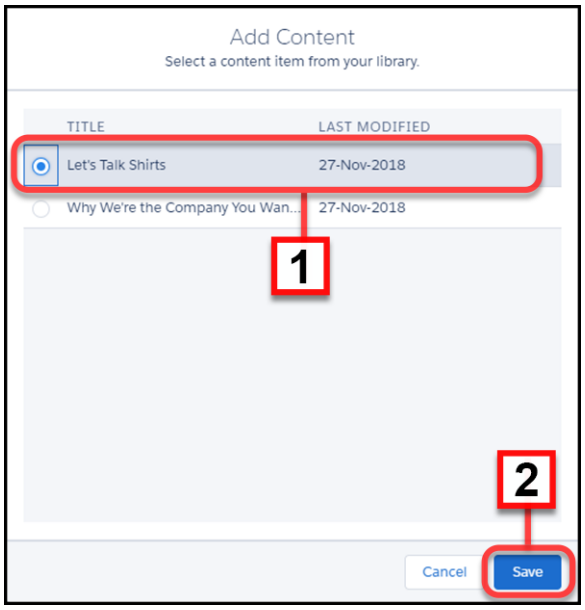
EDITIONS

Available in: Lightning Experience

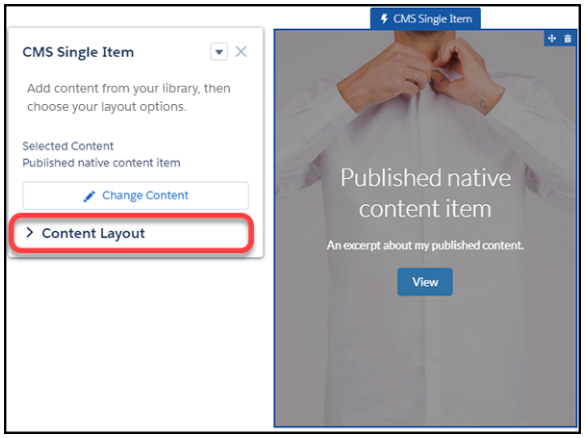
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

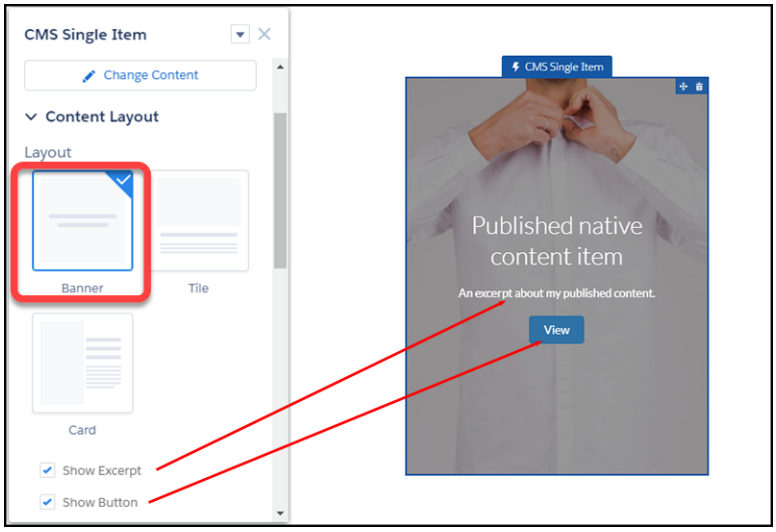
To create, customize, or publish a community
- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community



5. The content populates the component and now you can choose how to present its contents by expanding **Content Layout**.

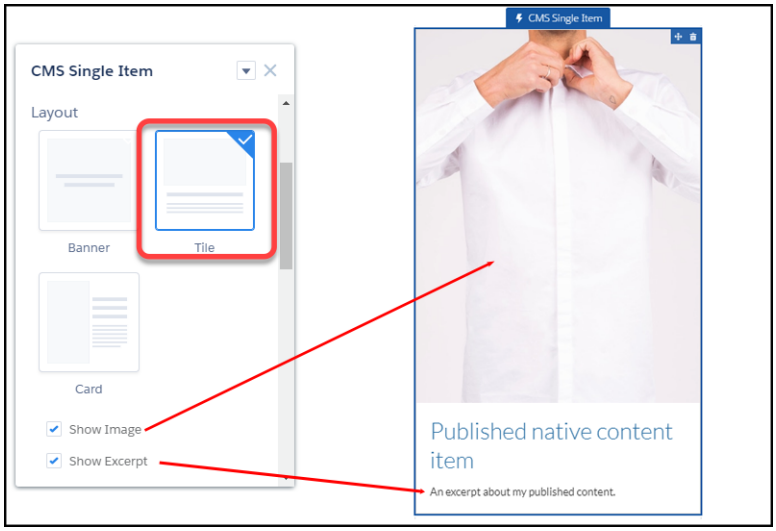


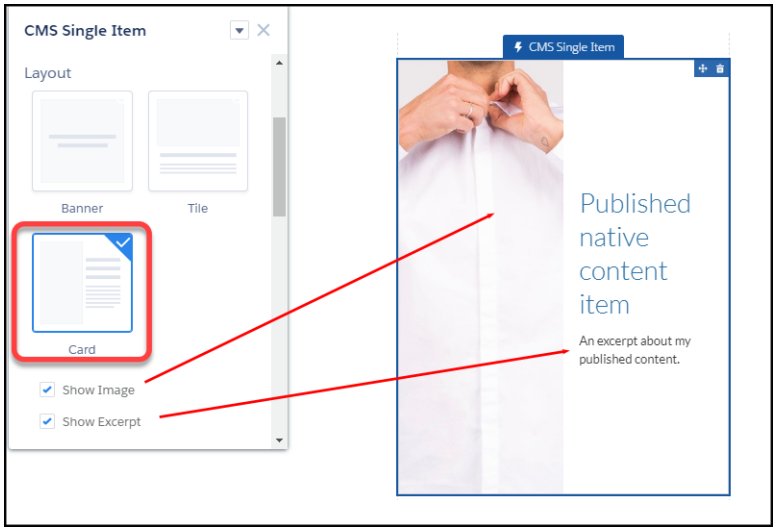
6. There are many familiar layout options for font size, image position, and overlays. There are also a few that may not be as familiar.



You can choose the overall configuration of the content by selecting one of the main layouts, each of which has its own options. For instance, you can choose to overlay the banner image with the excerpt you entered in the CMS Content form. You can also add a button, with an editable label, that opens the full piece of content on the News Detail page when clicked.

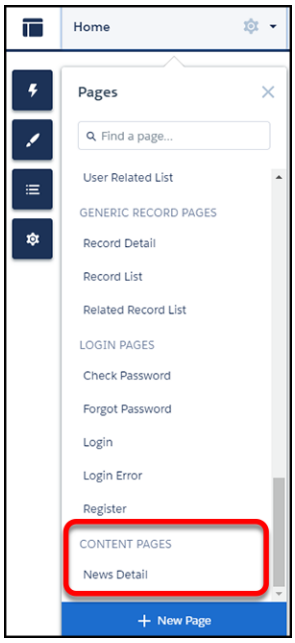
Tile and Card layouts have similar options, but use the content fields a little differently. You may have noticed there is no **Show Button** option available for these layouts. For Tile and Card, the title text of the content becomes a link to the detail page automatically.





7. Publish your community to make the changes live.

Just like a record detail page, CMS Single Item has a detail page to show expanded information from your content. The detail page, on News Detail, displays all the fields of the content form. We preconfigure the News Detail page for you, but you can adjust the layout.



SEE ALSO:

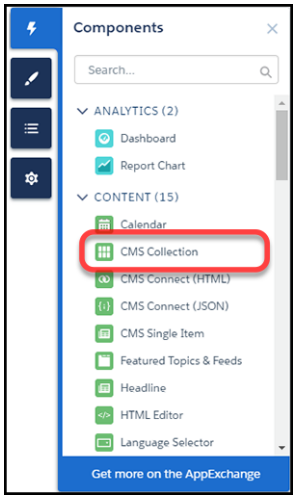
- Add CMS Content in Salesforce CMS (Beta)
- Edit Content in Salesforce CMS (Beta)
- Configure the Detail Page for Salesforce CMS Content (Beta)

Add Salesforce CMS Collections to Your Community (Beta)

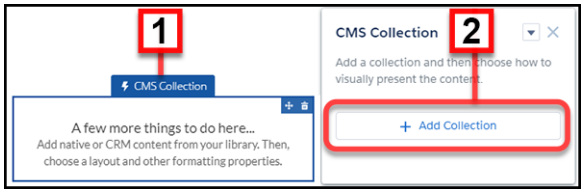
Once you've created a collection in Content Management, you have to associate it with an instance of the CMS Collection component in Community Builder so people can see the information.

The CMS Collection component can be added to a page multiple times and can use either CMS content or Salesforce CRM collections. You can add the CMS Collection component to pages before creating your first collection. Until a collection is associated with the component, you won't have access to the layout options.

1. Add a **CMS Collection** component to your page.



2. Click the component (1) to open the options menu. Then click **+ Add Content** (2) to select an available collection.



3. Choose a collection from your library and click **Save**.

EDITIONS

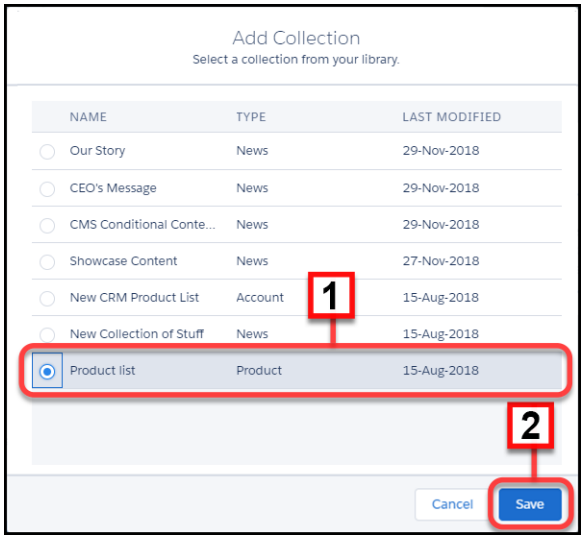
Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

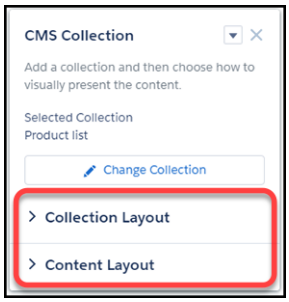
To create, customize, or publish a community

- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community



Note: The Type column lets you know the source of a collection. **News** is any collection comprised of CMS content. When you see an object name, such as **Account** or **Product**, that indicates a Salesforce CRM collection.

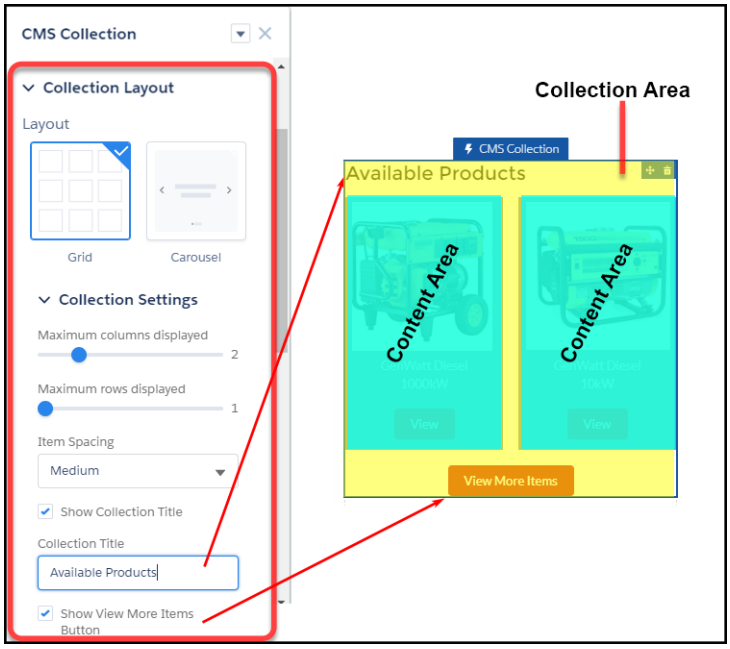
4. Now that you have some content feeding into the component, you have layout options to work with.

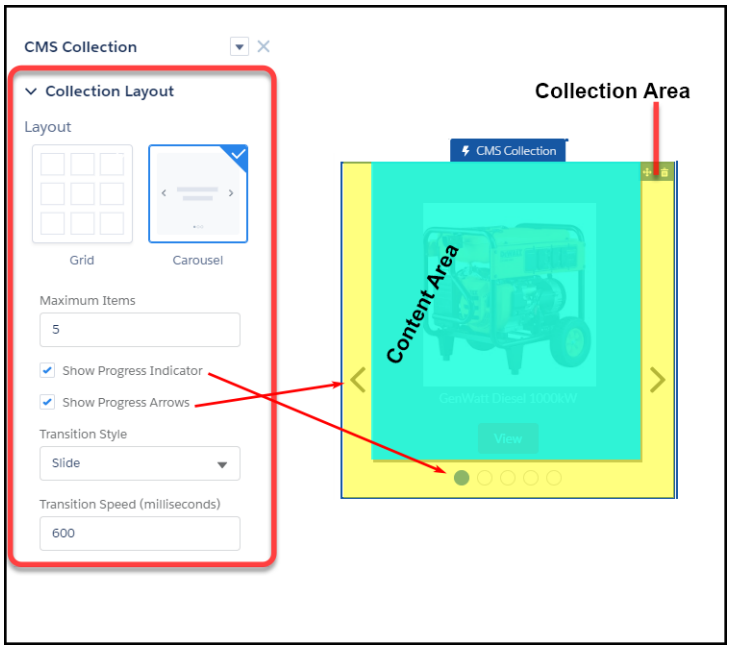


There are two levels of layout.

- **Collection Layout** determines how the individual content items are displayed on the page within the component. (As a 3x3 grid or as a carousel, for instance.)
- **Content Layout** options control how the content from an individual item is displayed within its box in the collection layout. For instance, how images are presented or how text is laid out for each individual item.

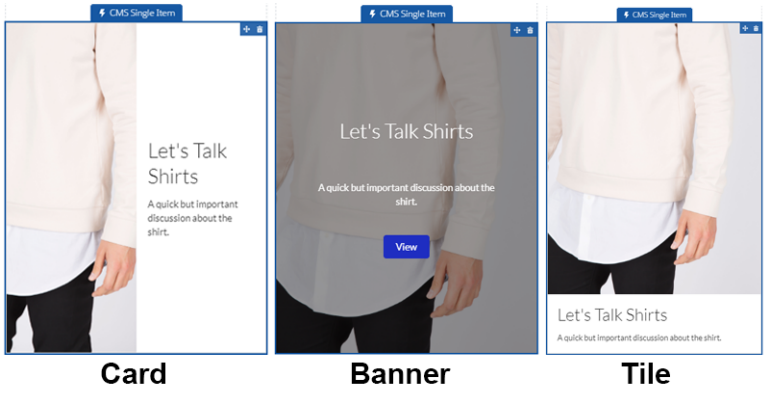
5. First choose how the collection displays by selecting and adjusting the **Collection Layout** options.



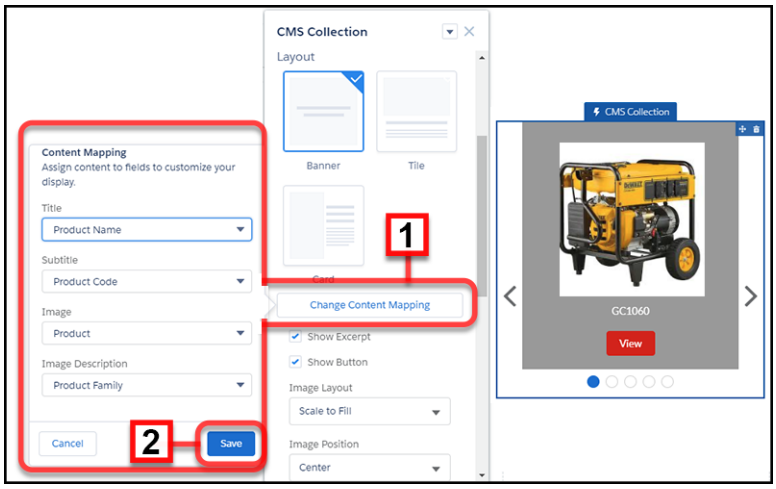


To see these layouts in action, preview your community.

6. Now choose the **Content Layout**. Most of the options will feel familiar. For instance, you have several content layout options such as Card, Banner, or Tile.



When using a Salesforce CRM collection, the fields from the objects are mapped into the content fields, such as Title and Image. Communities makes its best guess for you, but you can remap the fields to populate your component differently. Click **Change Content Mapping** (1) and then choose the available object field from the dropdown. Click **Save** (2) to apply the changes.



For Salesforce CRM content, the optional **View** links to the record detail page for the content item associated with the button. For CMS content it links to the News Detail page, which can be configured separately.

For CMS content, review the format and layout of the News Detail page and the CMS Single Item (Detail) component so that your material displays as you expect.

SEE ALSO:

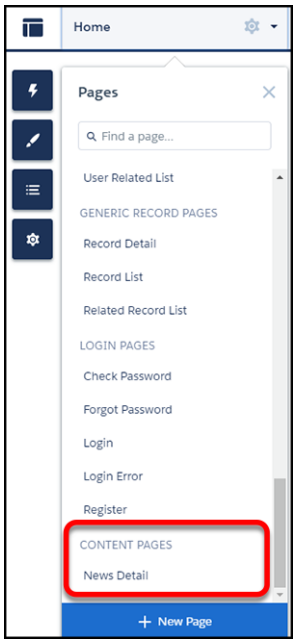
- Create CMS Content Collections Manually (Beta)
- Create CMS Content Collections Automatically (Beta)
- Create Salesforce CRM Collections for Salesforce CMS (Beta)

Configure the Detail Page for Salesforce CMS Content (Beta)

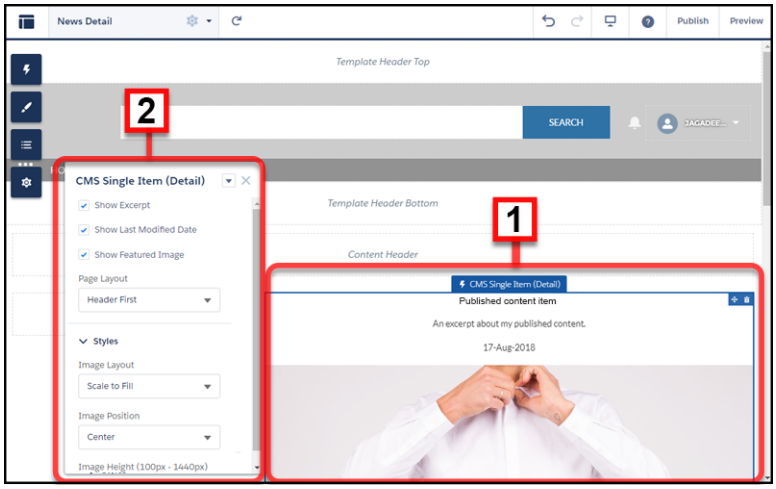
The News Detail page is a pre-configured detail page for content displayed in the CMS Single Item component.

Some of the CMS Content created in Salesforce CMS may only be a brief description or an image. Short content is able to display in its entirety in the CMS Single Item or CMS Collection component. However, sometimes the component can only display part of the content available as a summary, and that's what the News Detail page is for. Like the detail page for a record, this page displays details about the full CMS content item.

1. From the Pages menu, select **News Detail**.



2. Select the **CMS Single Item (Detail)** (1) component to open its options menu (2).



EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community

- Create and Set Up Communities AND View Setup and Configuration AND is a member of the community

The CMS Single Item (Detail) options allow you to expose or hide various fields from the CMS content form. In addition, you can choose to style the content to meet your needs and guidelines.

The CMS Single Item (Detail) component is a general container for all CMS content and can only be used on the News Detail page. You can adjust the layout and content of the News Detail page as you do other pages in your community.

SEE ALSO:

Add CMS Content in Salesforce CMS (Beta)

Connect Your External Content Management System to Your Community

Do you have a website built in an external content management system (CMS)? You can connect that CMS content to your community for consistent branding, reuse of material, and ease of maintenance.

What Is CMS Connect?

CMS Connect lets you embed assets from a third-party CMS in your Salesforce community. You can connect CMS components, HTML, JSON, CSS, and JavaScript to customize your community and keep its branding consistent with your website. We support personalized content from Adobe Experience Manager (AEM) as well.

After you do some initial configuration work, CMS Connect makes maintenance a breeze, because your content renders dynamically on your community pages. CMS Connect is the smart way to display headers, footers, banners, blogs, articles, and other reused content in your community. We give you many configuration options including language mapping between your CMS and Salesforce, determining the load order of multiple connections, and specifying CSS scope.

Which CMS Providers Are Supported?

CMS Connect supports content from these CMS providers:

- Adobe Experience Manager
- Drupal
- SDL
- Sitecore
- WordPress

Note: If your CMS server is not one we officially support, CMS Connect can still work if you set it up properly. CMS Connect works with the HTML/CSS/HTTP standards and isn't provider-specific.

IN THIS SECTION:

Before Using CMS Connect

Ready to get your CMS and your community connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

Create a CMS Connection

Create a connection between your content management system and your community so you can render headers, footers, banners, blogs, and other content on your community pages.

Edit a CMS Connection

You can edit a CMS connection that's already been set up in your community. For example, change the language mapping, or add CSS and JavaScript files.

Connect JSON Content from Your CMS to Your Community

Does your website have JSON content such as blogs or articles? Do you store it in a CMS such as WordPress or Drupal? Sweet! You can render this content in your community using CMS Connect.

Personalized Content in CMS Connect

If Adobe Experience Manager (AEM) is your CMS and your content is personalized, you can connect your personalized content to your community using CMS Connect.

Change the Load Order of CMS Connections

If your community has multiple CMS connections, you can decide the order in which they're loaded. The load order mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

Before Using CMS Connect

Ready to get your CMS and your community connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

Your HTTP server must serve HTML fragments

CMS Connect requires an HTTP server that can serve HTML fragments, either static or rendered on demand. Fragments can include headers, footers, components, CSS, or JavaScript.

URLs in CSS and JavaScript must be absolute

URLs in CSS and JavaScript must be absolute. Relative URLs in HTML are okay and are converted for you. CMS Connect appends host names and converts relative URLs to absolute URLs in the following HTML tags and attributes:

- `<img>` tag `src` attribute
- `<audio>` tag `src` attribute
- `<input>` tag
- `<button>` tag `formaction` attribute
- `<video>` tag `src` and `poster` attributes
- `<a>` and `<area>` tags `href` attribute
- `<form>` tag `action` attribute
- `<del>`, `<ins>`, `<blockquote>`, and `<q>` tags `cite` attribute
- `<script>` tag `src` attribute

Community Host must be a trusted host in the Cross-Origin Resource Sharing (CORS) header

CMS Connect uses CORS to access external content. Make sure to add Community Host (both production and preview URLs) to the list of trusted hosts in the CORS header in your CMS system.

CORS is a web standard for accessing web resources on different domains. CORS is a required technology to connect your CMS to Salesforce. It's a technique for relaxing the same-origin policy, allowing JavaScript on a web page to consume a REST API served from a different origin. CORS allows JavaScript to pass data to the servers at Salesforce using CMS Connect.

To enable CORS in development environments, we recommend using a Chrome plugin. For production environments, refer to your CMS documentation on enabling CORS.

Note: For more information about CORS, see https://developer.mozilla.org/en-US/docs/Web/HTTP/Access_control_CORS.

The domains that you whitelist are unique to your org and differ depending on whether you've implemented My Domain, but follow a general set of patterns.

Orgs with My Domain enabled and subdomains of `INST.force.com`

Domain	URL Pattern
Builder Preview	*[mydomain]*`--sitepreview.INST.force.com`
Builder Live Preview	*[mydomain]*`--livepreview.INST.force.com`
Builder Preview	*[mydomain]*`--`*[sandboxname]*`--sitepreview.INST.force.com`
Builder Live Preview	*[mydomain]*`--`*[sandboxname]*`--livepreview.INST.force.com`

Orgs that have the instance-less critical update activated (your URLs don't have instances in them) and My Domain enabled

Domain	URL Pattern
Builder Preview	*[mydomain]*.preview.salesforce-communities.com
Builder Live Preview	*[mydomain]*.livepreview.salesforce-communities.com
Builder Preview	*[mydomain]*`-`*[sandboxname]*.preview.salesforce-communities.com
Builder Live Preview	*[mydomain]*`-`*[sandboxname]*.livepreview.salesforce-communities.com

Orgs without My Domain enabled and with subdomains of `INST.force.com`

Domain	URL Pattern
Builder Preview	*[ccommunitysubdomain]*`--preview.INST.force.com`
Builder Live Preview	*[ccommunitysubdomain]*`--live.INST.force.com`
Builder Preview	*[sandboxname]*`-`*[ccommunitysubdomain]*`--preview.INST.force.com`
Builder Live Preview	*[sandboxname]*`-`*[ccommunitysubdomain]*`--live.INST.force.com`

Whitelist external hosts

Content Security Policy (CSP) requires external hosts to be whitelisted appropriately. Script resources, such as JavaScript, must be whitelisted in the Security settings of Builder. Non-script resources, such as images and css, must be whitelisted in CSP Trusted Sites in

your Salesforce org settings. CMS Connect will attempt to whitelist hosts it is aware of for you, but additional links in imported content, for instance, would not be captured by that process.

Some tags and scripts aren't allowed

CMS Connect filters out the same HTML tags that Lightning Locker and Lightning Components do. Get familiar with these now to avoid surprises later. See Add Markup to the Page <head> to Customize Your Community for a list of supported tags.

Supported MIME types

Only the following MIME types are supported.

- CONTENT_TYPES_HTML: 'text/html'
- CONTENT_TYPES_JS: 'application/javascript'
- CONTENT_TYPES_JSON: 'application/json'

All CMS servers must be accessible via unauthenticated HTTPS (HTTP over SSL)

All CMS servers you connect must be accessible via unauthenticated HTTPS (HTTP over SSL) to retrieve HTML and JavaScript. When you set up a CMS connection, the server URL you enter must start with HTTPS. This is to ensure all web communications that are required remain private. An SSL certificate is required for unauthenticated HTTPS for all traffic between your servers and Salesforce.

All JavaScript and CSS must be from the same source as HTML

All JavaScript and CSS files referenced by your HTML must point to your CMS source.

Community Workspaces must be enabled

To use CMS Connect, you must have Community Workspaces enabled in your Community Settings. From Setup, go to Community Settings. Make sure the Enable Community Workspaces checkbox is selected.

CMS Connect org perm must be left on

CMS Connect is controlled by an org permission that is turned on by default. If you're not seeing CMS Connect in your Community Workspaces, it's possible that the permission is turned off. You can ask Salesforce Customer Support to turn it back on for you.

SEE ALSO:

Content Security Policy in Lightning Communities

My Domain Overview

Create a CMS Connection

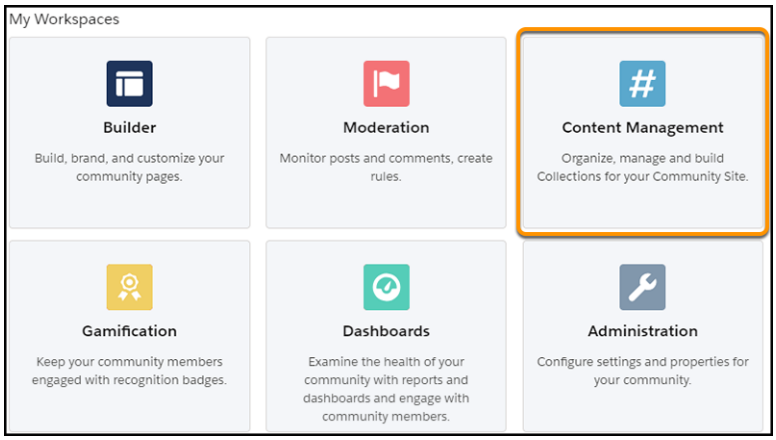
Create a connection between your content management system and your community so you can render headers, footers, banners, blogs, and other content on your community pages.

Before you begin:

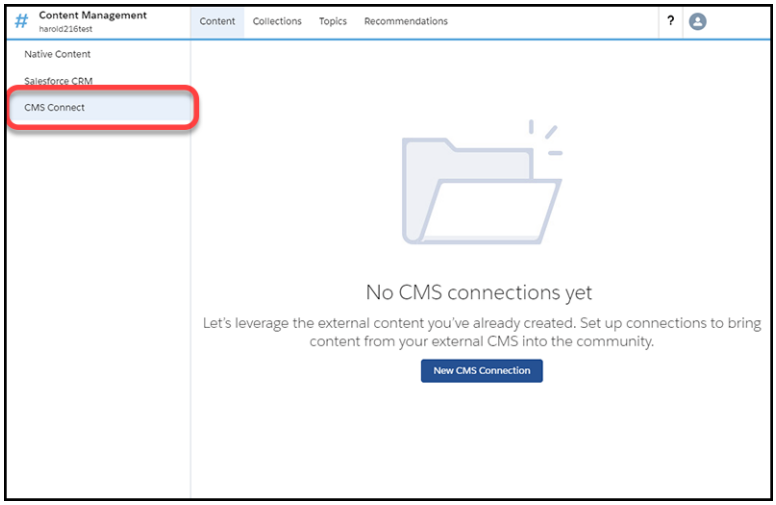
- Read Before Using CMS Connect to make sure that you're ready to connect to your CMS.

- If you're setting up an authenticated connection, create named credentials in your Salesforce settings. Both anonymous and named principal protocols are supported. See Define a Named Credential.

1. Open Community Workspaces on page 20.
2. Click **Content Management**.



3. Select **CMS Connect**.

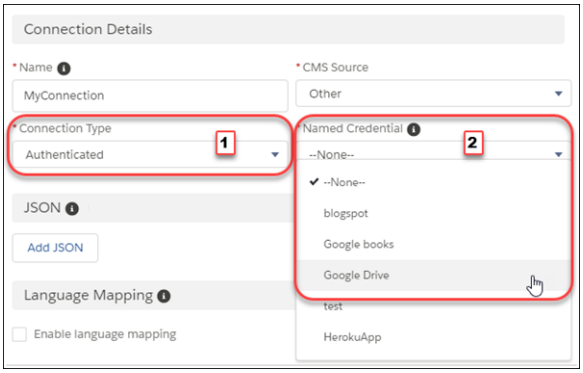


4. Click **New CMS Connection** (if none exist) or **New**.
5. In the Connection Details form, enter a friendly name for the connection.
   The name shows up in your CMS workspace and other internal areas. Based on the name you enter, an API name is created for the connection behind the scenes.
6. Select your CMS source: AEM, Drupal, SDL, Sitecore, WordPress, or Other.

   Note: If your CMS server isn't listed, select **Other**. CMS Connect works with HTML, CSS, and HTTP standards and isn't provider-specific.

7. Select a connection type.

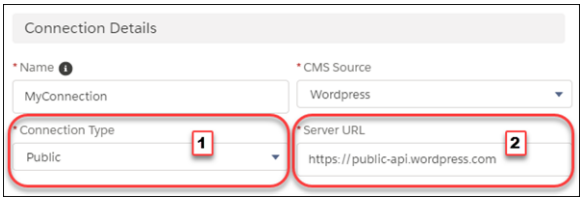
- To create an authenticated connection, select **Authenticated** (1) and select a named credential (2) that you defined previously to authenticate the connection to your external system. Authenticated connection types only work with JSON content.



Then, go to step 12.

- To create a public connection, select **Public** (1) and enter a server URL (2).

Enter the full path to a CMS server that's accessible using HTTPS and use a fully qualified domain name, such as `https://www.example.com`. Public connection types work with all connection methods.



Then, go to step 8.

Note: If your Content Security Policy is set to:

CSP Setting	Description
Strict CSP	You will receive a warning that the source may not work. Test your connection to determine if you need to choose a different CSP option for your community to use CMS Connect.
Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts	The new URL is automatically added to the CSP Trusted Sites for your org. – The new listing will be named the same as the CMS connection, with a context of Communities. – If the URL is already in your list, no additional entry will be made. – If the name of the CSP Trusted Site is already taken, it will be made unique by appending a number (1, 2, 3, etc.). Note: If you experience issues when testing your site, confirm the necessary URLs are in CSP Trusted Sites and try again. Content from external sources may contain additional URLs that need to be whitelisted to work properly.

8. For an HTML connection, enter the root path to the directory that your CMS content is in. The path is the relative path from your server URL. You can include placeholders for language and component. For example, here's an example root path to content in AEM.

   ```
   content/mywebsite/{language}/{component}
   ```

   Note: You use the `{language}` placeholder only when you enable language mapping and add at least one language.

9. If your CMS source is AEM and your HTML content is set up with personalization, you can use that personalized content in your community. To do that, enable **Use Personalization**. See Enable Personalization for a CMS Connection.

   Note: To use personalization, in Community Builder, enable it for the components that you want to personalize. For the header and footer, go to **Settings** > **CSM Connect**. For other components, such as banners, use the component's property editor.

10. To link to a CSS style sheet, click **Add CSS** and enter the URL to your CSS file. Repeat for additional style sheets. If your CSS is scoped, you can specify it in the Scope field.

    Style sheets load in the order listed.

11. To link to a JavaScript file, click **Add Script** and enter the URL to your JavaScript file. Repeat for additional files.

    Scripts load in the order listed.

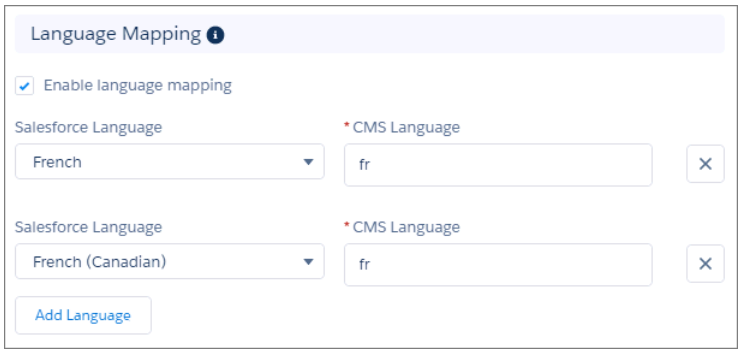
12. To connect JSON content such as blogs, click **Add JSON** and enter a name, type, and path for each JSON component you want to add. See Connect JSON Content from Your CMS to Your Community.

13. If your content has multiple languages, select **Enable language mapping**, choose the Salesforce language, and for CMS Language, enter the directory name of your language folder from AEM.

    For example, to map English, enter the directory name of your English language folder from AEM, such as `en`.

    To add more languages, click **Add Language**. For each language that you add from your CMS, make sure it's enabled in your Builder Settings.

    If you want to map languages from your community that you don't have in your CMS, you can define which language to use for the CMS content. For example, if your community has French and French Canadian enabled, you can set it up so that the French Canadian community displays French content.



14. Click **Save**.

CMS Connect attempts to whitelist external hosts as appropriate, either in CSP Trusted Sites or in the Community Builder Security settings. External hosts referenced by material pulled into your community, such as additional images or scripts in an external post, are not whitelisted automatically and may require you to do so manually.

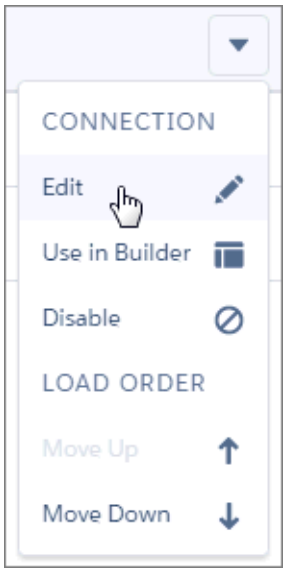
SEE ALSO:

- Content Security Policy in Lightning Communities
- Create CSP Trusted Sites to Access Third-Party APIs
- Reuse Content with CMS Connect JSON
- Set Up a Connection for Your JSON CMS
- Example: Connect JSON Content to Your Community

Edit a CMS Connection

You can edit a CMS connection that's already been set up in your community. For example, change the language mapping, or add CSS and JavaScript files.

1. Open Community Workspaces on page 20.
2. Click **CMS Connect**.
3. Click for the connection you want to edit. Choose **Edit**.



4. Make changes as needed. See Create a CMS Connection on page 528 for details.
5. Click **Save**.

SEE ALSO:

- Set Up a Connection for Your JSON CMS

Connect JSON Content from Your CMS to Your Community

Does your website have JSON content such as blogs or articles? Do you store it in a CMS such as WordPress or Drupal? Sweet! You can render this content in your community using CMS Connect.

CMS Connect supports two basic types of JSON content. What they're called in your CMS might be different than what another CMS calls them. In CMS Connect, to keep things simple, we call them **Content Item** and **Content List**.

An example of a content item is a single blog post. When it displays on a page, it's the full blog post, not just a blurb about it. A content list, on the other hand, is a grouping of items such as blog posts. Most often, each item in a content list contains a link to those items. When setting up paths to your JSON content in a CMS connection, specify the type for each one: content item or content list.

Set Up JSON in a CMS Connection

1. When creating or editing a CMS connection, in the JSON section, click **Add JSON**.
2. Enter a name for your content. It can be anything you want. For example, `Home Improvement Blogs`.
3. Select the type of content to add. Is it a single article or blog post, such as DIY Dryer Vent Cleaning? Then select **Content Item**. Or is it a grouping of items, such as DIY Featured Blogs, that has links to individual blog posts? Then select **Content List**.
4. Enter the path to the JSON component in your CMS. For a content list, also enter the starting node in the Node Path field.
5. Want to add more JSON? Repeat the above steps for each content item or content list to add.
6. When finished, save the connection.

Add JSON Components to Your Community Pages

1. In Community Builder, from the Components panel, drag the **CMS Connect (JSON)** component onto the page where you want the JSON content to display.
2. Select the component to display its properties.
3. In the property editor, select the CMS source that contains your JSON content.
4. Select the name of the JSON content to use.
5. Enter the component path. The path is optional for content lists and required for content items.
6. The remaining settings vary based on whether you're displaying a content item or content list. See CMS Connect (JSON) in the components reference for details.

Get Analytics on the Material Brought in by CMS Connect (JSON)

Remember, the content you display in your community when using CMS Connect (JSON) doesn't live in your community. This means getting usage data requires a few extra steps.

Configure External Objects for the data that you are interested in tracking using Salesforce Connect or OData, Salesforce Reporting.

SEE ALSO:

- Reuse Content with CMS Connect JSON
- Set Up a Connection for Your JSON CMS
- Add CMS Connect (JSON) Components to Your Community Pages
- Example: Connect JSON Content to Your Community
- Content Security Policy in Lightning Communities

Personalized Content in CMS Connect

If Adobe Experience Manager (AEM) is your CMS and your content is personalized, you can connect your personalized content to your community using CMS Connect.

Personalization in CMS Connect lets you keep the branding and other content consistent between your community and your website. If you've gone to all the work of setting up personalization in AEM, make the most of that effort by rendering your personalized content in your community. Display content according to different segments, based on criteria such as geolocation or language.

Connecting your AEM content personalized with Client Context requires creating a connector page and installing it in AEM. The connector page is a JSP file that contains the logic of your website's personalization mapping. You might need to make a few tweaks to it, depending on how you want to run scripts. Then provide the path to this connector page in AEM when you're setting up the CMS connection in your community. That's where you can also add a path to your JavaScript file if you want to run scripts dynamically.

With personalization enabled, when a visitor views your community, we send client context information about the visitor such as IP address and geolocation. The logic in the connector page computes and returns a personalized URL for the content, which the visitor then sees.

After setting up personalization in your connection, enable it for each component you want to personalize.

IN THIS SECTION:

Enable Personalization for a CMS Connection
To use the personalization feature of Adobe Experience Manager (AEM) in Communities, you must first enable it for CMS Connect.

Personalize Your Components in CMS Connect
Use Adobe Experience Manager (AEM) personalization to maintain branding in your community components.

Personalize Header and Footer Content in CMS Connect
Use Adobe Experience Manager (AEM) personalization to maintain branding in your community header and footer.

Enable Personalization for a CMS Connection

To use the personalization feature of Adobe Experience Manager (AEM) in Communities, you must first enable it for CMS Connect.

1. When creating or editing a CMS connection, in the HTML section, select **Use Personalization**.
2. In the Connector Page Path field, enter the path to the JSP file that you created and installed in AEM. This file contains the logic of your personalization mapping.
3. To run scripts dynamically, provide the path to your JavaScript file in the Script Path field.
4. Click **Save**.

Personalize Your Components in CMS Connect

Use Adobe Experience Manager (AEM) personalization to maintain branding in your community components.

To personalize components in Community Builder.

1. In Community Builder, go to the page that contains a CMS Connect (HTML) component you want to personalize.
2. Select the component to display its properties.
3. In the property editor, enable **Use Personalization**. You see this setting only if your CMS source is AEM and personalization is enabled for your connection.

Personalize Header and Footer Content in CMS Connect

Use Adobe Experience Manager (AEM) personalization to maintain branding in your community header and footer.

To personalize a header and footer.

1. From Community Builder, go to Settings.
2. Select **CMS Connect**.
3. Select **Use Personalization** next to the header, footer, or both.

   Note: If the **Use Personalization** option is grayed out, it likely means that personalization isn't enabled for the CMS connection. Enable it in your connection settings first.

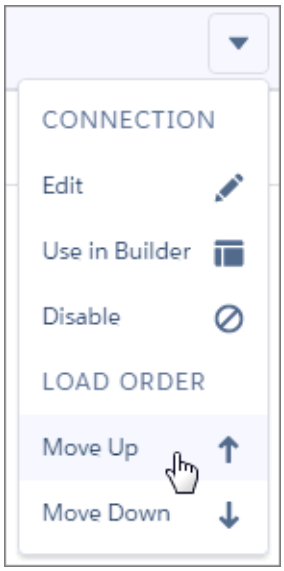
Change the Load Order of CMS Connections

If your community has multiple CMS connections, you can decide the order in which they're loaded. The load order mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

For example, suppose one of your connections has the JavaScript library jquery, and another connection relies on jquery. Set the connection with jquery to load first so that the other connection can also load.

Header and footer always render first regardless of the load order of your connections.

1. Open Community Workspaces on page 20.
2. Click **CMS Connect**.
3. Click for the connection you want to reorder.
4. Choose **Move Up** or **Move Down**.



Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A Lightning Bolt Solution is a portable package that's packed with power. It can combine custom Lightning apps, business process flows, and Lightning Community templates and pages in an easy-to-build and distributable form. Use a Lightning Bolt Solution to share or sell a solution on AppExchange, implement a community with a turnkey solution or new look, or configure automation. You can publish apps or flows without a Lightning Community template or include one when you want to apply your brand.

A Lightning Bolt Solution combines one or more of the following.

- Customized Lightning Community templates—A template includes a theme layout and CSS, along with pages, content layouts, and Lightning components. Instead of a full template, you can also export a single Community page with its content layout and components.
- Flow categories—A flow category contains one or more flows, making it easy to group flows for related business processes.
- Custom apps—Adding customized apps lets you create solutions tailored to your industry.

Lightning Bolt Solutions are flexible, so you can take advantage of them in many ways. Here are just a few examples.

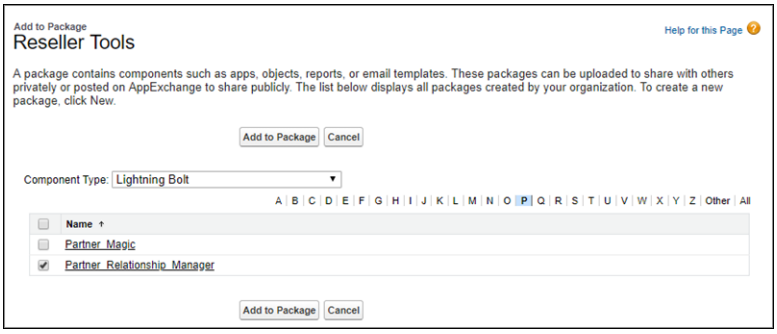
Example: You've customized the Partner Central template to create a community with features that meet your particular business needs. You want to create several similar partner communities, but you don't want to build each one from scratch. By exporting your customized template, you can reuse it and build as many branded communities as you need.

Example: You're a consulting partner who specializes in creating solutions for the real estate industry. Your solutions feature a unique look, custom apps for finding mortgages, and automation that alerts sales people of properties with active prospects. With a Lightning Bolt Solution, you can create and export your solution in a way that's easy to use. After you install your Lightning Bolt Solution in the customer's org, you can further customize it to suit their needs. By building the bulk of the solution in your org and then distributing it to your customers, you can rapidly launch new solutions.

Example: You're an ISV who builds a custom insurance agent app. The app includes automation to create coverage estimates and automatically notify customers of the results. Using a Lightning Bolt Solution, you can easily bundle your app and business process flows into a single package. Distribute the package to your customers to install in their Salesforce orgs, or market the solution on AppExchange.

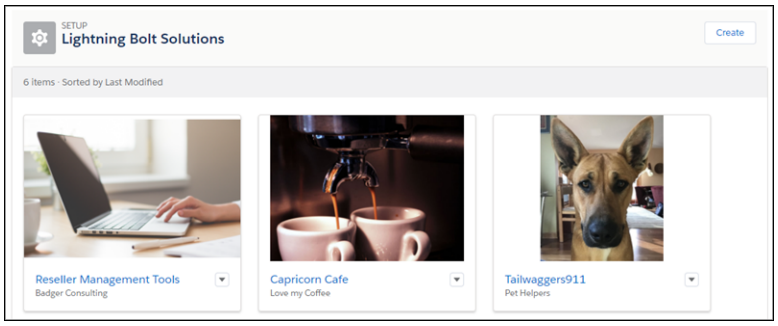
Package and Distribute Your Solution

You can package and distribute solutions to use in other orgs and communities. After you create and upload a package, share the link privately with your clients, customers, or partners. Alternatively, publish your custom Lightning Bolt Solution as a managed package in AppExchange. Market your solution with an AppExchange listing in the same way that you list any other app, component, or consulting service. Describe your solution, pricing, support, and other details so that customers can determine whether your offering is right for them.



Reuse Your Own Solution

When you create a solution, it appears in the list of Lightning Bolt Solutions in your org. You can use it to build new communities or enhance an existing one.



IN THIS SECTION:

Create a Lightning Bolt Solution

Have at least one Lightning Community template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. WithLightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Lightning Community templates and pages in easy-to-build, distributable packages.

Export a Customized Lightning Community Template in a Lightning Bolt Solution

You can customize and export a Lightning Community template to use as a base for creating communities. Create custom pages, layouts, and components. Export and package the template on its own, or distribute it for others to use as a part of a Lightning Bolt Solution.

Export a Customized Community Theme in a Lightning Bolt Solution

Export themes that you've customized. Use them in your own communities, or package and distribute them for others to use.

Export a Customized Community Page in a Lightning Bolt Solution

Export pages that you've customized in a Lightning Community template. Use them as a base for new pages, or package and distribute them for others to use.

Add Flows to a Lightning Bolt Solution

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Requirements for Distributing Lightning Bolt Solutions

Whether you're a partner, ISV, or developer, before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

SEE ALSO:

Salesforce Partner Community: Lightning Bolt for Partners

Lightning Aura Components Developer Guide

Lightning Community Developer Guide

ISVforce Guide

Security Developer Center

Package and Distribute Your Apps

Create a Lightning Bolt Solution

Have at least one Lightning Community template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. WithLightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Lightning Community templates and pages in easy-to-build, distributable packages.

Including a Lightning Community template in your Lightning Bolt Solution is optional. Use any Lightning template as a base to build your custom solution with standard pages and components, or create custom pages, layouts, and components of your own. After you finish customizing the template, export it or one of its pages from **Community Settings** > **Developer**.

To include flows, first create a flow category, and add the active flows that you want to export.

1. From Setup, enter `Lightning Bolt Solutions` in the Quick Find box, and select **Lightning Bolt Solutions**.
2. On the Details and Branding page, enter information about your solution. For example, enter your company and solution names, and list the solution's key features. Click **Next**.
3. On the Solution Highlights page, add any combination of Community templates, flow categories, and custom apps. Click **Next**.
4. Review the Summary page, and click **Finish**.
   The new Lightning Bolt Solutions is now ready for distribution.

SEE ALSO:

Add Flows to a Lightning Bolt Solution

Export a Customized Lightning Community Template in a Lightning Bolt Solution

Export a Customized Community Page in a Lightning Bolt Solution

Package and Distribute a Lightning Bolt Solution

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a flow category:

- Customize Application

To create a Lightning Bolt Solution without a community template:

- Customize Application AND View Setup and Configuration

To create a Lightning Bolt Solution with a community template:

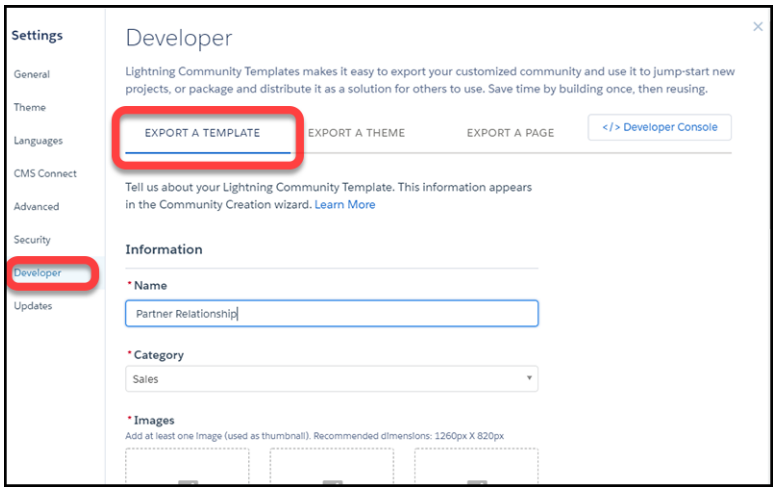
- Customize Application AND Create and Set Up Communities AND View Setup and Configuration

Export a Customized Lightning Community Template in a Lightning Bolt Solution

You can customize and export a Lightning Community template to use as a base for creating communities. Create custom pages, layouts, and components. Export and package the template on its own, or distribute it for others to use as a part of a Lightning Bolt Solution.

Note: You can't export a Lightning Community template until you update the template to unify its branding properties.

1. In Community Builder, select **Settings** > **Developer**, and click **Export a Template**.
   The information that you add on this page appears in the Community Creation wizard and helps others understand your template's purpose and benefits.
2. Add a unique name for the template, and select a category.



3. Add at least one image as the thumbnail image. The recommended image dimensions are 1260 x 820 pixels.
   You can add two more images that appear in the detailed description of the template.
4. Enter a summary that describes the purpose of the template.
5. Enter at least one key feature.
   The feature titles appear under the thumbnail in the Community Creation wizard. The feature descriptions appear in the solution's detailed description.
6. Click **Export**.
   After you export the template, it appears in the Community Creation wizard in your org. You can then use it as a base for building new communities. If you package the template in a Lightning Bolt Solution and install it in another org, it appears in that org's Community Creation wizard.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

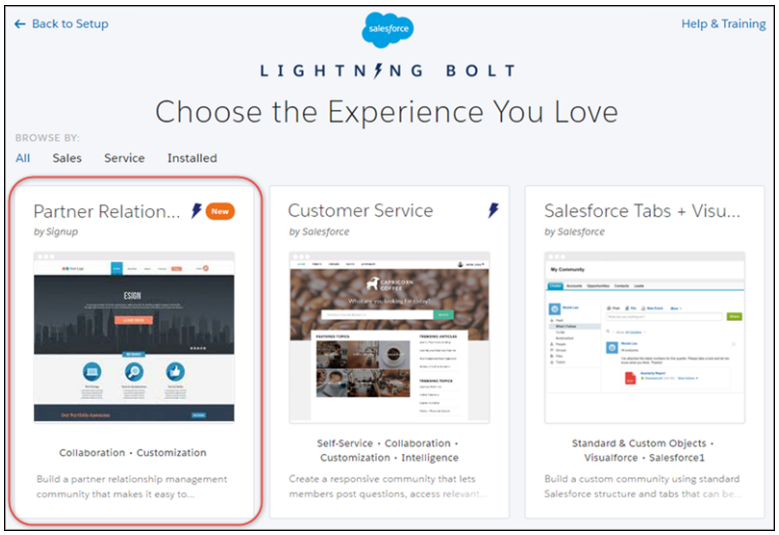
USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

To create a Lightning Bolt Solution with a community template:

- Customize Application AND Create and Set Up Communities AND View Setup and Configuration



7. To distribute the template as a Lightning Bolt Solution, create a managed package.

To delete an exported or imported template, from Setup, enter `Lightning Community Templates` in the Quick Find box, and then click **Lightning Community Templates**.

Deleting a template from your org doesn't affect communities that are already based on it.

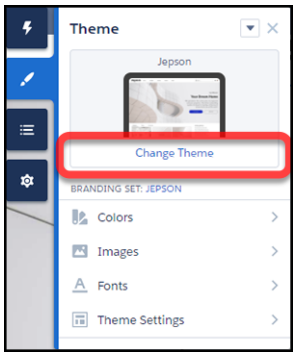
SEE ALSO:

- Export and Packaging Considerations for Lightning Bolt Solutions
- Package and Distribute Your Apps
- *ISVforce Guide*: Creating and Uploading a Managed Package

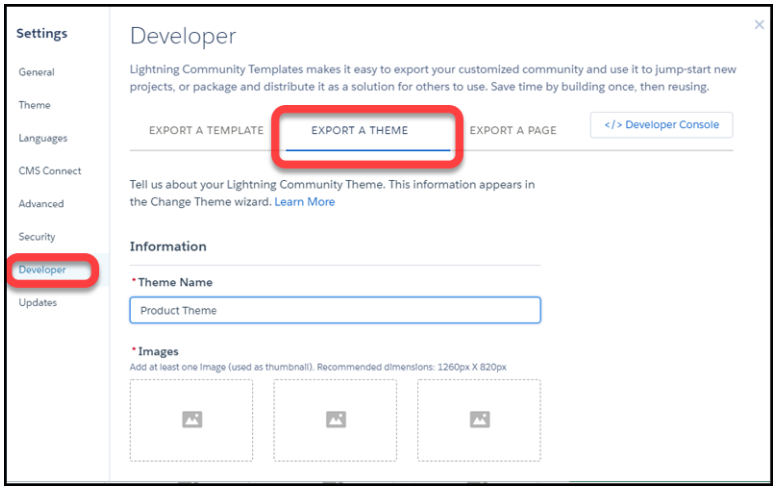
Export a Customized Community Theme in a Lightning Bolt Solution

Export themes that you've customized. Use them in your own communities, or package and distribute them for others to use.

1. In Community Builder, change to the theme you want to export if that isn't your active theme.



2. Select **Settings** > **Developer**, and click **Export a Theme**.



3. Fill in the form with the needed elements for the Change Theme detail page. Clear information and images help you and others understand what is in the theme and how it works.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

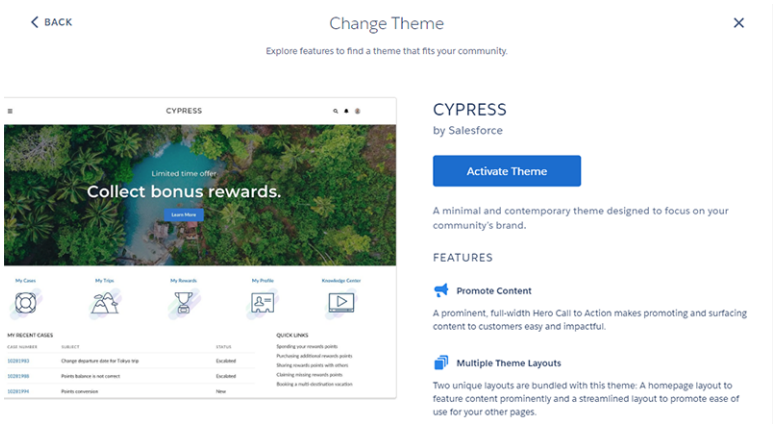
USER PERMISSIONS

To create, customize, or publish a community:

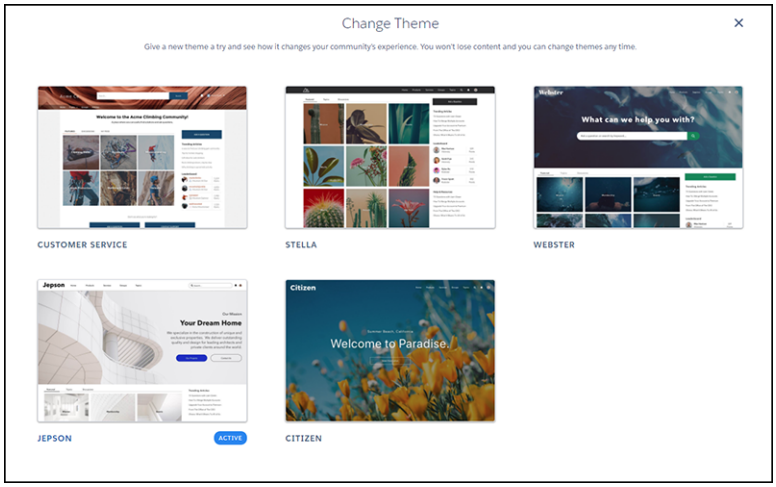
- Create and Set Up Communities AND View Setup and Configuration

To create a Lightning Bolt Solution with a community template or page:

- Customize Application AND Create and Set Up Communities AND View Setup and Configuration



4. Click **Export**.
   After you export a theme, it appears in the Change Theme dialog box in all the communities in your org. If you package the theme and install it in another org, it appears in that org's Change Theme dialog box. Themes are ordered by how new they are, so a newly imported theme appears at the beginning of the list.



5. To distribute your theme, create a managed package. Or, add the theme to a Lightning Bolt Solution, and include it in the package.

   Note: You can quickly get to the Package page of Salesforce setup quickly by selecting **Package the Lightning Community Theme** in the export page success message.

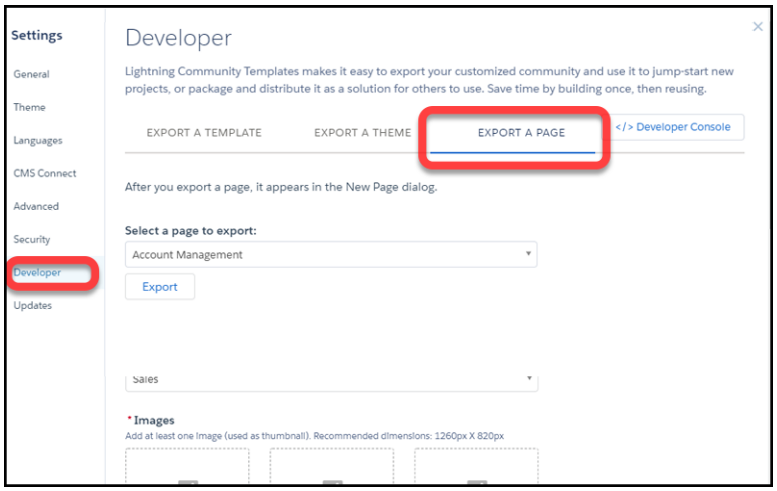
You can delete an imported or exported theme from Lightning Community Themes in your Salesforce settings. From Setup, enter `Lightning Community Themes` in the Quick Find box, and click **Lightning Community Themes**.

Existing communities that are based on the deleted theme are unaffected. However, deleted themes no longer appear in the Change Theme dialog.

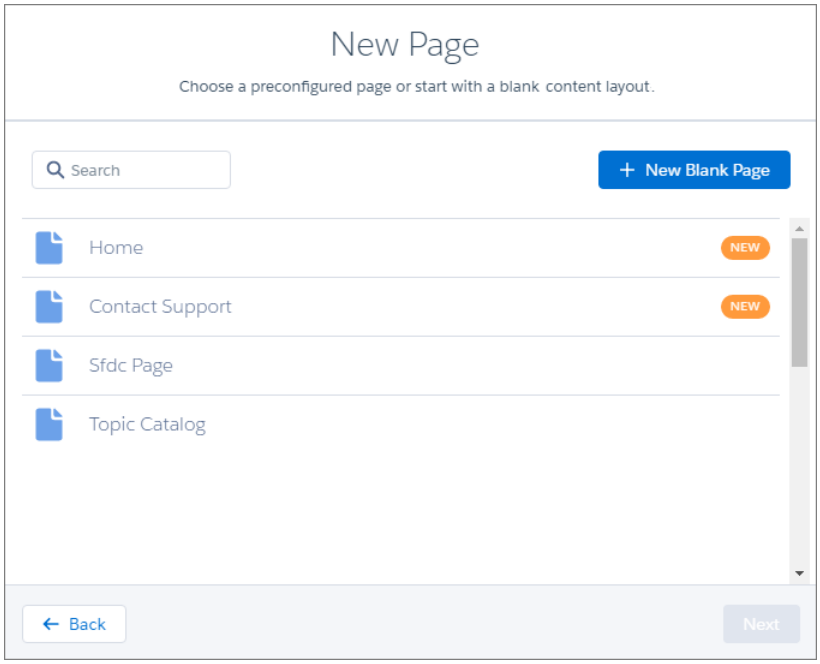
Export a Customized Community Page in a Lightning Bolt Solution

Export pages that you've customized in a Lightning Community template. Use them as a base for new pages, or package and distribute them for others to use.

1. In Community Builder, select **Settings** > **Developer**, and click **Export a Page**.



2. Select the page to export.
3. Click **Export**.
   After you export a page, it appears in the New Page dialog box in all the communities in your org. If you package the page and install it in another org, it appears in that org's New Page dialog box. A newly installed page is highlighted as New for 30 days.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

To create a Lightning Bolt Solution with a community template or page:

- Customize Application AND Create and Set Up Communities AND View Setup and Configuration

4. To distribute your page, create a managed package that includes the page. Or, add the page to a Lightning Bolt Solution, and include it in the package.

   Note: You can quickly get to the Package page of Salesforce setup quickly by selecting **Package the Lightning Community page** in the export page success message.

You can delete an imported or exported page from the Lightning Community Pages in your Salesforce settings. From Setup, enter `Lightning Community Pages` in the Quick Find box, and click **Lightning Community Pages**.

Existing pages in Community Builder that are based on the deleted page are unaffected. However, deleted pages no longer appear in the New Page dialog.

SEE ALSO:

- Export and Packaging Considerations for Lightning Bolt Solutions
- Package and Distribute Your Apps
- *ISVforce Guide*: Creating and Uploading a Managed Package

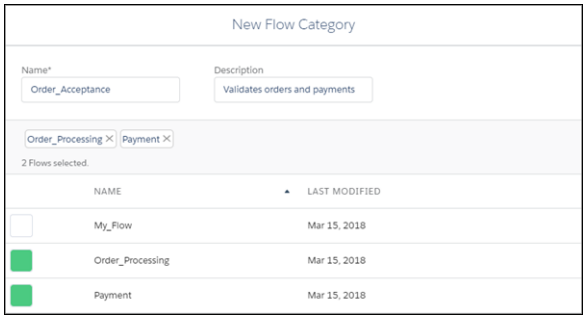
Add Flows to a Lightning Bolt Solution

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

You can use a Lightning Bolt Solution to publish a turnkey solution on AppExchange, bootstrap a community with a complete solution or new look, or reuse automated processes that use flows.

You can only add active flows to a flow category.

1. From Setup, enter `Flow Category` in the Quick Find box, and select **Flow Category**.
2. Click **New Flow Category**.
3. Enter your developer name and a description. For the name, only alphanumeric characters and underscores are valid.
4. Choose flows from the list of active flows.



5. Save the flow category.
6. Add the flow category and any custom Lightning apps, Lightning Community templates, or other flow categories that you want to export to a Lightning Bolt Solution.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a flow category:
- Customize Application

To create a Lightning Bolt Solution without a community template:
- Customize Application AND View Setup and Configuration

To create a Lightning Bolt Solution with a community template:
- Customize Application AND Create and Set Up Communities AND View Setup and Configuration

7. Package the solution to distribute in your orgs or in AppExchange.

SEE ALSO:

Cloud Flow Designer

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Add Custom Apps

- When you include apps in a Lightning Bolt Solution, follow general guidelines in the ISVforce Guide for developing and distributing Lightning apps.
- When you package the solution, app components are automatically added to the package. For example, the package includes customized fields, page layouts, and relationships with standard objects.

Add Flows

- To reuse a single flow or a group of flows, add them to a flow category. Then include the flow category in your Lightning Bolt Solution.
- You can add only active flows to a flow category.

Export and Package a Lightning Community Template

- An exported template name must be unique.
- You can export a custom Lightning Community template from Community Builder and include it in a Lightning Bolt Solution, but including a template isn't required.
- When you export a template from Community Builder, the system removes non-alphanumeric characters from template and page names. For example, My Template #2 becomes My_Template_2.
- In the Community Creation wizard, the template author (for example, *by Salesforce*) differs for an exported and imported template. When you export a template, your org name is shown within your own org. When you import a template, the publisher name of the package is shown.
- For navigation menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies, although custom list views for custom objects are included.
- Only the following Administration settings (in Workspaces or Community Management) are included.
  - Change password page
  - Forgot password page
  - Home page
  - Login page
  - **Allow internal users to log in directly to the community** option

- The following items are not included when you export a Lightning Community template. After you import the template and use it to create a community in the destination org, you must manually reconfigure these items.
  - Most Administration settings (except for the settings already listed).
  - Community Builder settings, including head markup and the Google Tracking ID.
  - Custom theme layout components that are not listed in **Settings** > **Theme** > **Configure** are not included. Theme layout components do not need to be assigned to a page to be included.
  - Custom styles in the CSS editor.
  - Localized content for multilingual communities.
  - Non-default page variations; only default page variations are included. If a page doesn't have a default variation, the page is excluded. For example, if a page has two variations that are both set to audience-based visibility, then the page is excluded entirely.
- If you upgrade a managed template package, existing communities that are based on the upgraded template aren't updated.
- Some pages in a template are available only when a feature is enabled in your org—for example, the Article Detail page requires Salesforce Knowledge. An exported template includes just the pages that exist in your community at the time of export, and any community that's built using the exported template includes only those same pages. For further assistance, contact Salesforce Customer Support.

Export and Package a Theme

- You can export a custom Lightning Community theme from Community Builder but a standalone theme can't be included in a Lightning Bolt Solution.
- An exported theme name must be unique.
- Custom theme layout components that are not listed in **Settings** > **Theme** > **Configure** are not included. Theme layout components do not need to be assigned to a page to be included.
- If you upgrade a managed theme package, existing communities that are based on the upgraded theme aren't updated.
- When you export a theme from Community Builder, the system removes non-alphanumeric characters from your theme name. For example, My Theme #2 becomes My_Theme_2.

Export and Package a Single Community Page

- The exported Community page name must be unique.
- When you export a page, the system generates a developer name (`devName`) by prepending the community name and removing non-alphanumeric characters. For example, My #awesome page in the Acme community becomes Acme_My_awesome_page. Developer names longer than 80 characters are truncated.
- When you export a Lightning Community page, its page variations aren't included in the package. Export the page variations separately.
- Exported page variations use the naming convention `[Community Name]_[Page Name]_[Variation Name]`.

Original Page Name	Exported Page Name	Exported Page Developer Name
Coffee Fans	Coffee Fans	Acme_Coffee_Fans
West Coast (page variation)	Coffee Fans - West Coast	Acme_Coffee_Fans_West_Coast
East Coast (page variation)	Coffee Fans - East Coast	Acme_Coffee_Fans_East_Coast

- For images in the Rich Content Editor, we export the version used in the editor, which is not necessarily the latest version of the asset file.
- Audience-based visibility criteria aren't included in the export process. Manually reenter this information after importing the page to the community in the destination org.
- You can't export individual login pages.

SEE ALSO:

Salesforce App Considerations

Export a Customized Lightning Community Template in a Lightning Bolt Solution

Export a Customized Community Page in a Lightning Bolt Solution

Package and Distribute Your Apps

ISVforce Guide: Creating and Uploading a Managed Package

Requirements for Distributing Lightning Bolt Solutions

Whether you're a partner, ISV, or developer, before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Before you distribute your solution, use these checklists.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Requirements for Lightning Bolt Solutions

For all Lightning Bolt Solutions that are ready for distribution, make sure that you have:

- [ ] Included at least one of the following:
  - A custom Lightning app
  - A flow category that contains one or more flows
  - A Lightning Community template
- [ ] Tested all community functionality and appearance across desktop, tablet, and mobile devices
- [ ] Confirmed that your customizations have no regressions (each release)
- [ ] Verified that Salesforce approves of all third-party technology that you use
- [ ] Ensured proper code coverage, and executed basic performance testing
- [ ] Adhered to all Salesforce Lightning developer guidelines (such as attribute enforcements)
- [ ] Included written installation and configuration documentation
- [ ] Developed appropriate customer support for custom functionality

Requirements When Including a Lightning Community Template

If your solution includes a template, make sure that you have:

- [ ] Developed a custom Lightning Community template
- [ ] Included at least one custom Lightning component (API version 40.0 or later)
- [ ] Included at least one custom Theme Layout component with a unique visual design
- [ ] Tested the template with the "Strict CSP" enabled in your community settings

Best Practices

- To improve automation and code coverage, use a Salesforce testing framework, such as the Lightning Testing Service (LTS).
- Include only essential Visualforce components and pages.

SEE ALSO:

Lightning Community Developer Guide: Create Custom Theme Layout Components for Communities

Lightning Aura Components Developer Guide: Salesforce Lightning CLI

ISVforce Guide: Publish Your Offering on the AppExchange

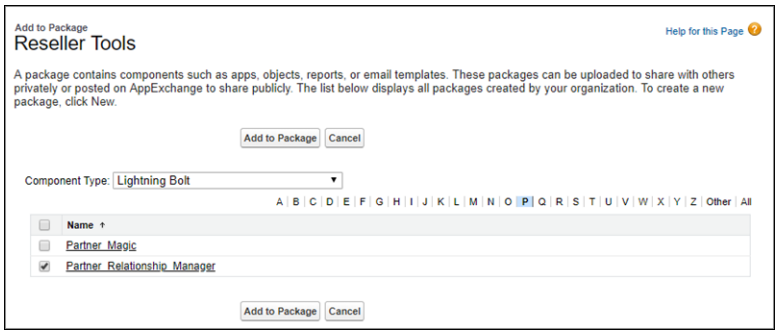
Security Developer Center

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

A package is a container for something as small as an individual component or as large as a set of related apps. Packages come in two forms—managed and unmanaged. We recommend using only managed packages to avoid naming conflicts with other packages in your customer's org or your own. To create a managed package, use a Developer Edition org.

1. From Setup, enter `Packages` in the Quick Find box, and then click **Packages**.
2. To package a Lightning Bolt Solution, select **Lightning Bolt Solution** as the component type, and select your solution. To package a standalone Lightning Community template, theme, or page instead of a full Lightning Bolt Solution, select **Lightning Community Template**, or **Lightning Community Theme**, or **Lightning Page** as the component type to add. All supported dependencies are included.



3. Upload the package. Then distribute it on AppExchange, or share the link privately with your clients, customers, or partners.

SEE ALSO:

Create a Lightning Bolt Solution

ISVforce Guide: Overview of Packages

ISVforce Guide: Creating and Uploading a Managed Package

ISVforce Guide: Publish Your Offering on the AppExchange

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

To create and upload packages:

- Create AppExchange Packages AND Upload AppExchange Packages

Community Management

Community Management is your one-stop shop for administering, managing, and moderating your community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Community Managers, Moderators, and Admins Working Together

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

Measure Community Success with Dashboards

Use Dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

Community Managers, Moderators, and Admins Working Together

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A community manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony in the community. Sometimes, they perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for monitoring adoption and engagement, the moderator is typically responsible for ensuring the community is a healthy environment and that members feel encouraged to be active and helpful to each other.

Community managers, moderators, and admins all work together to protect, engage, and measure community success.

Prevent spammers, bots, and trolls from attacking the community.

Protect the community from trademark infringement and legal issues.

Ensure community members use appropriate language and adhere to the terms of use.

Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.

Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

IN THIS SECTION:

Manage Your Community
Set up and monitor your community from Community Management or Community Workspaces.

What's a Community Manager?
Every community needs someone to take an active role in making sure that the community thrives. Community managers spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

What's a Community Moderator?
Moderators help ensure the success of your community by monitoring user activity and flagged items.

Access Community Management
Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

Manage Your Community

Set up and monitor your community from Community Management or Community Workspaces.

You can customize your community at any time, but if you plan to make major changes, we recommend deactivating the community first.

Important: The options available in Community Management or Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community doesn't use topics, you don't see the Topics section. Some options in the following list might not appear in your community by default. To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Community Management** or **Show all settings in Community Workspaces**.

Home

- View your community's home page dashboard. If your home page still displays a message to install the Salesforce Communities Management package, your administrator hasn't mapped a dashboard yet.
- Preview the community or access your community's settings in the Community Builder, Lightning Platform, or Site.com Studio from Community Management or Community Workspaces.

Engagement

Monitor recent activity and take immediate action directly from Community Management or from the Moderation workspace in Community Workspaces.

Your admin sets up Insights. If the Engagement section doesn't appear, the admin hasn't mapped Insights for this community.

Dashboards

View dashboards and monitor information about groups, members, feed activity, moderation, topics, and license usage for this community.

Your admin sets up Dashboards. If the Dashboards section doesn't appear, the admin hasn't mapped dashboards for this community.

Moderation

View reports for flagged posts, comments, messages, and files. You can also see a report of all posts that are pending review and set up moderation rules for this community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To access moderation rules and criteria:

- Manage Communities OR Create and Set Up Communities

To customize administration settings or use Community Builder:

- Create and Set Up Communities

Your admin sets up Moderation.

Topics

Create a navigation menu and showcase popular topics in your community.

Typically, your admin sets up Navigational topics and featured topics. If you're using self-service templates, Navigational topics and featured topics are enabled by default. If the Topics section doesn't appear, your community isn't using topics.

Recommendations

Recommendations can help drive engagement in a community. They can be set up to encourage users to watch videos, take trainings, and more.

Your admin sets up Recommendations. If the Recommendations section doesn't appear, the admin hasn't set up recommendations.

Reputation

Set up reputation levels and points to reward members for activity in the community feed.

Your admin sets up Reputation. If the Reputation section doesn't appear, the admin hasn't enabled it.

Administration

Use the Administration page to update the community's basic setup.

- Members—Add or remove members based on profiles or permission sets.
- Tabs—Select the tabs you want community members to see. Tabs are also used to determine community navigation in the Salesforce app. If your community was created with one of the self-service templates, tab settings aren't used.
- Branding—Select a provided branding color theme. This branding controls header and footer text for pages in your community. The branding settings apply if you're using the default or the Salesforce tabs + Visualforce template.
- Login & Registration—Select the login page for this community, and set up self-registration.
- Emails—Customize email sender information, Chatter email branding, and templates in your community emails.
- Pages—Configure page assignments for your community, and access the Lightning Platform and Site.com settings for this community.
- Preferences—Update important settings, such as content flags, nicknames, public access to Chatter, and file limits.
- Settings—Edit your community name, description, and community URL. You can also manage the status of your community and update your community template.

Lookups in Community Management and Community Workspaces initially return the items you most recently viewed from within the community. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.

Important: If you're an admin and accidentally remove yourself from a community, you can't access the Administration settings in Community Management or Community Workspaces. To add yourself back to the community or make other membership updates, use the API.

SEE ALSO:

What's a Community Manager?

What's a Community Moderator?

What's a Community Manager?

Every community needs someone to take an active role in making sure that the community thrives. Community managers spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

Community managers must be employees of your organization; external community members can't be community managers.

A community manager is a member of the community that takes on the extra responsibility of monitoring community engagement. Community managers need access to reports and dashboards that show trends in activity and membership. They also need to be aware if members aren't logging in as frequently as they should be. By monitoring community membership and activity, community managers can figure out how to engage community members and ensure that they participate.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A powerful tool for a community manager is the ability to recognize individual members for their participation, because community managers know that recognition and a little friendly competition usually lead to more active members. Community managers can set up a point system and reputation levels that reward members with points when they perform certain actions. Once members reach the top of the level's point threshold, they move up a level.

IN THIS SECTION:

Assign a Community Manager
To assign a user as a community manager, simply give them the "Manage Communities" permission.

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

Community managers must be employees of your organization; external community members can't be community managers. To assign a user as a community manager, give them the "Manage Communities" permission. With this permission, they can access the Community Management page or Community Workspaces.

Note: Go to **Communities Settings** to enable Community Workspaces.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the "Manage Communities" permissions.
3. From Setup, enter *Users* in the Quick Find box, then select **Users**.
4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management or Community Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

What's a Community Moderator?

Moderators help ensure the success of your community by monitoring user activity and flagged items.

In a successful community, members are actively engaged and communicating with one another. A community moderator facilitates knowledge sharing within a community to help members benefit and derive value from their participation. The moderator also helps ensure that all communications and content in the community are appropriate.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management and Community Workspaces. External users who are moderators can moderate within context of the community, such as directly in the community feed. This person should be accustomed to interfacing with customers and can spend time regularly monitoring the community.

A moderator can:

- Review and act on the list of flagged posts and comments in the community
- Review and act on the list of flagged files in the community
- Remove flags directly in the community
- Delete inappropriate posts, comments, messages, and files

A moderator can also help drive the success of a community in many other ways.

- Sharing relevant and useful information in community posts
- Encouraging members to post and comment on each other's posts
- Setting an example by their activity in the community
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to communities when it can benefit other community members
- Establishing the community as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator for a community, especially if the community has a large number of members.

Note: Although they share some similar capabilities, a community moderator is different from a Chatter moderator.

IN THIS SECTION:

Which users can moderate?
There are multiple types of users who can moderate a community when flagging is enabled.

Assign a Community Moderator
Make one or more people moderators in your community so they can keep an eye on its content.

SEE ALSO:

Move Feed Items from One Public Group Feed to Another

Which users can moderate?

There are multiple types of users who can moderate a community when flagging is enabled.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management and Community Workspaces. External users who are moderators can moderate within context of the community, such as directly in the community feed. Moderators can continue to flag items even if flagging is disabled for community members, although group owners and group managers can only moderate when flagging is enabled.

Who can moderate items in a community depends on permissions or if the user is a group manager or owner. This table shows who can moderate and what actions they can take in the user interface.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Action	User with "Moderate Communities Feeds"	User with "Moderate Communities Files"	Group Owner or Manager (on items in groups they own or manage)*
Remove flags on a post or comment	✅		✅
Delete a post or comment	✅		✅
Remove flags on a file		✅	✅
Delete a file		✅	✅

*To allow group owners and managers to moderate, the `Allow members to flag content` option must be enabled.

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management and Community Workspaces. External users who are moderators can moderate within context of the community, such as directly in the community feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions.

Permission	Allows Users To
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the community feed and in Community Management and Community Workspaces.
Moderate Communities Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Community Management or Community Workspaces.
Moderate Communities Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to only flagged messages in communities they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.
Moderate Community Users	Freeze external users who are members of the community. Moderators can freeze members on their user profile page or from an Insights report.
Manage Communities	Moderate community content in Community Management or Community Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Permission	Allows Users To
Access Community Management	Access community pages from Community Managementand Community Workspaces

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, enter *Users* in the Quick Find box, then select **Users**.
4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

After you grant moderator permissions to a user, keep these things in mind:

- The user can now moderate any items they have access to in all communities they're a member of.
- The user can flag items even if Allow members to flag content is disabled in a community.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the Flag an item as inappropriate email notification.

Access to moderator functionality is slightly different depending on user permissions:

- **In the community feed**: Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.
- **In Community Management** and **Community Workspaces**: Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area.

Access Community Management

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

1. Access Community Management in one of the following ways.
   - From the community:
     - In Salesforce Tabs + Visualforce communities, click ⚙ in the global header.
     - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.
   - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community. To access this page, you need the Create and Set Up Communities" permission.
   - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

   If your community has Community Workspaces enabled, access that instead and navigate to the Moderation workspace.
2. Choose the part of the community you want to manage:

   Note: The options available in Community Management and Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you don't see the Topics section. Some of To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Community Management** or **Show all settings in Community Workspaces**.

   - Preview the community or access your community's settings in the Community Builder, Lightning Platform, or Site.com Studio from Community Management or Community Workspaces.
   - In Engagement, you can view Insights reports and take action on activity in your community.
   - In Dashboards, you can view community dashboards and reports.
   - In Moderation, you can set up moderation rules and monitor flagged feed items.
   - In Topics, you can manage navigational and featured topics.
   - In Recommendations, you can set up custom recommendations to appear in your community.
   - In Reputation, you can set up reputation levels and points.
   - In Administration, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities
- AND is a member of the community

To access moderation rules and criteria:

- Manage Communities OR Create and Set Up Communities

To customize administration settings or use Community Builder:

- Create and Set Up Communities

Measure Community Success with Dashboards

Use Dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Enable and Map Dashboards for Community Managers

Community managers can use dashboards in each community to measure its success. You can even map a dashboard to the Community Management or Community Workspaces Home page. You can map custom dashboards or use the ones provided in our AppExchange package.

Create a Dashboard for Your Community

While you can show any dashboard in your community, we recommend creating them based on the custom report types available for communities.

View Community Dashboards.

Use dashboards to monitor the health of your community.

What's the difference between Engagement Insights and dashboards?

Engagement Insights let you take immediate action on recent activity in your community, and the reports in dashboards let you see trends.

Enable and Map Dashboards for Community Managers

Community managers can use dashboards in each community to measure its success. You can even map a dashboard to the Community Management or Community Workspaces Home page. You can map custom dashboards or use the ones provided in our AppExchange package.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your organization, each of the pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

To map or update your dashboards:

1. Open Community Workspaces or Community Management.
2. Click **Dashboards** > **Settings**.
3. For each of the pages, select the dashboard you want to show to community managers. To change the name of the dashboard page, click inside the dashboard label.

   The dashboard you map to Home displays on your Community Management or Community Workspaces Home page.
4. Click **Save**.

   Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Community Management or Community Workspaces.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the Home page, check that out too.

SEE ALSO:

Create a Dashboard for Your Community

View Community Dashboards.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To map dashboards in Community Management or Community Workspaces:

- Create and Set Up Communities OR Manage Communities

  AND

  Manage Dashboards in Public Folders

  AND

  Is a member of the community

Create a Dashboard for Your Community

While you can show any dashboard in your community, we recommend creating them based on the custom report types available for communities.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Open Community Workspaces or Community Management.

1. Create custom report types based on the Networks object.

   Only reports that are based on the Networks object show community-specific information in Community Management and Community Workspaces.

   Note: You can create reports based on other objects and expose them in Community Management or Community Workspaces. Keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Feed Revisions
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics
     - Unpublished Feed Entities

2. Use the custom report type to create a report.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.
   - Add a component for each report you want to include in your dashboard.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create custom report types:
- Manage Custom Report Types

To create, edit, and delete reports:
- Create and Customize Reports

To create and share dashboards:
- Manage Dashboards in Public Folders

- Find your report on the Data Sources tab and add it to the component.

For a Salesforce Classic dashboard to optimally render in the Lightning view used in Community Management and Community Workspaces, make sure that your dashboard meets these requirements.

- Includes only up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

  For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.
5. From Community Management or Community Workspaces, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Community Management or Community Workspaces, the dashboard appears under Dashboards. If you mapped a dashboard to the Home page, the dashboard appears there.

Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Note: Communities don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

SEE ALSO:

Create a Custom Report Type

Create a Report

Track Community Activity with Custom Reports

Share a Report or Dashboard Folder in Salesforce Classic

View Community Dashboards.

Use dashboards to monitor the health of your community.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

1. Open Community Workspaces or Community Management.
2. Click Dashboards.

   Note: If the Dashboards section isn't displayed, your administrator hasn't mapped them for your community.

   Pages that have dashboards mapped to them appear in the Dashboards section or on the Home page.
3. Click the dashboard page you want to view.
   The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**

   Note: The refresh button is not available in Lightning communities accessed through mobile devices.

   .

   Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

   Note: Communities don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.
4. To view a related report, click **View Report** on the dashboard.

   Remember that the dashboards are configured to display community-specific data.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

SEE ALSO:

What's the difference between Engagement Insights and dashboards?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view dashboards:

- Manage Communities

  OR

  Create and Set Up Communities

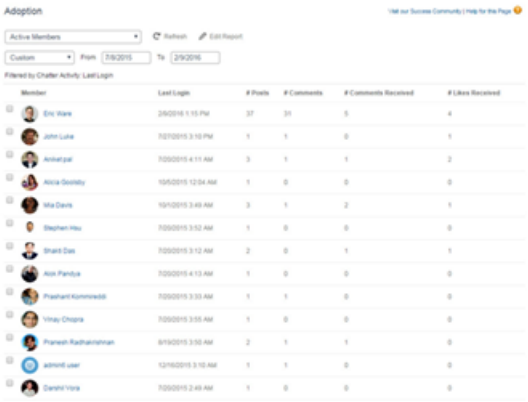
  AND

  Is a member of the community

What's the difference between Engagement Insights and dashboards?

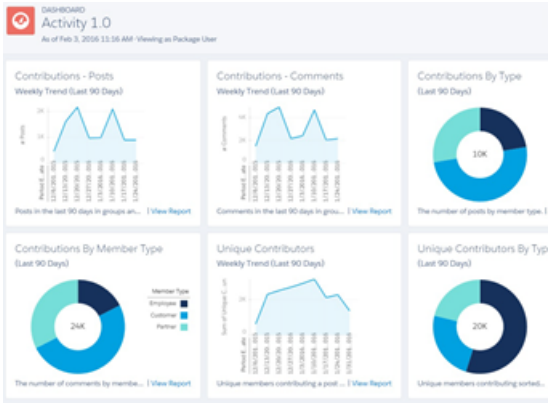
Engagement Insights let you take immediate action on recent activity in your community, and the reports in dashboards let you see trends.

Use Engagement to view, monitor, and act on your community's activity. Engagement Insights give you a detailed look at a specific area of your community.



For example, you can visit the **Engagement** > **Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Engagement Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

Use Dashboards to view your community's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).



For example, you can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.

SEE ALSO:

- View and Customize Engagement Insights for Your Community
- View Community Dashboards.

Community Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your community based on triggering events or geared for specific audiences. Greet new members with rich content emails, send reminders to members who need profile pics, or schedule follow-up emails for members who log a case. To use this feature, you must have both Communities and Marketing Cloud licenses.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: This feature passes member information, including email addresses, from the Community Cloud to the Marketing Cloud.

Trigger a personalized journey with events, or choose a specific audience.

Examples of events include:

- User joins a community
- Case creation
- User buys a product (depending on configuration)
- New Chatter group membership
- New Chatter post creation
- Chatter question and answer activity
- Create or update any custom object and most standard objects

Examples of audiences include:

- All members of the community
- User who own a certain product (depending on configuration)
- Members with the highest number of reputation points
- Members who belong to the same Chatter group
- Members who have not contributed in the last number of days

The two clouds integrate through Marketing Cloud Connect (available on the AppExchange). Once it's set up, you're ready to go. The process and email creation is all handled in Journey Builder. The See Also links guide you to those steps.

A few things to do and consider before you get started:

- Make sure that you have both Marketing Cloud and at least one community set up.
- Install the Marketing Cloud Connect package.
- Decide whether to use contact or user data.

Note: Adding members to a community is slower when triggering journeys. If you're adding lots of new members, like more than 1,000, at once, we suggest letting Journey Builder run overnight.

IN THIS SECTION:

Community Journey Data Model

When you create a community journey, you choose whether to add user or contact data. To avoid unintentionally sending emails to people who have opted out, you must stay consistent. There are also some event trigger and tracking limitations.

Email Preferences

The Unsubscribe link at the bottom of a Marketing Cloud email opts the person out of all further emails from that instance of Marketing Cloud. If you want users to be able to unsubscribe from community emails without unsubscribing from other brand or company emails, some setup is required.

Triggering Journeys Based on Events

You can trigger journeys based on an event that happens in the community, like when members join.

Triggering Journeys Based on Audiences

You can select a set of users—an audience—and put them into a journey. Your audience can be specific and include, say, a member who purchased a certain product and posted within the last 30 days.

Determine If an Object Can Trigger Journeys

Before you create an event-based journey, check that the object you want to use works. This test helps you identify available objects.

Sync an Object to the Marketing Cloud

To create an audience-based Journey, sync object data to the Marketing Cloud.

Community Objects for Creating Member Journeys

Most, but not all, community objects can be used for creating journeys. This list includes the available objects along with a description, their eligibility status, API object, and use cases (as appropriate).

SEE ALSO:

Connect the Clouds

Journey Builder

Get Started With Journey Builder

Community Journey Data Model

When you create a community journey, you choose whether to add user or contact data. To avoid unintentionally sending emails to people who have opted out, you must stay consistent. There are also some event trigger and tracking limitations.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Every external community member has both an associated user object and a contact object. Internal community users, including employee communities users, typically have only the user object. The email preferences for the user and contact records aren't linked. A person who opts out of a contact record journey still gets email from user record journeys. A best practice is to choose one data type and stick to it.

A couple of other points to consider when picking the data model:

- Some events can trigger only user-based journeys. When you create a journey for a given event, the application shows you whether you can add user, contact, or either record to the journey. For many common community objects, only the user record is available. If you plan to standardize on contacts, use audience-based journeys instead as they can utilize either the user or contact records.
- Emails sent by journeys that are based on contact records are logged on the contact objects in Salesforce. Logging is not always the case for journeys based on user records. If tracking is important, go with contacts.

SEE ALSO:

Triggering Journeys Based on Audiences

Triggering Journeys Based on Events

Email Preferences

The Unsubscribe link at the bottom of a Marketing Cloud email opts the person out of all further emails from that instance of Marketing Cloud. If you want users to be able to unsubscribe from community emails without unsubscribing from other brand or company emails, some setup is required.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: Email preferences are not automatically synced between Community Cloud and Marketing Cloud without customization. Consider discussing implementing a custom subscription center with your integrator or Salesforce services.

The controls for system-generated emails from a community, like comment notifications, are managed within the Community by members, not within Marketing Cloud.

SEE ALSO:

- Profile Center and Subscription Center
- Manage Your Community Email Notifications

Triggering Journeys Based on Events

You can trigger journeys based on an event that happens in the community, like when members join.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

For an event to trigger a journey, the object that the event happens to must be workflow-enabled. Most standard objects in Salesforce (such accounts, leads, case, and opportunity), all custom objects, and many community-specific objects are workflow enabled. Some community-specific objects, however, are not.

Note: As a best practice, create sample journeys to make sure that the objects you want to use can trigger a journey and the data is accessible.

SEE ALSO:

- Community Objects for Creating Member Journeys
- Determine If an Object Can Trigger Journeys
- The Salesforce Data Event
- Salesforce Community

Triggering Journeys Based on Audiences

You can select a set of users—an audience—and put them into a journey. Your audience can be specific and include, say, a member who purchased a certain product and posted within the last 30 days.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To define the audience, you select the members using either SQL in Automation Studio or Audience Builder. Make sure that Marketing Cloud can access the data tables. In core Salesforce, the tables must be replicated and synced to Marketing Cloud as a Synchronized Data Source within Contact Builder. This process assisted by the Marketing Cloud Connect package, but it's not automatic. You must choose which tables you want to sync and the object must be replicable.

Note: Once object data is synced into Marketing Cloud, you can use the data to make decisions at junction points in a journey. Such junctions are known as decision splits.

SEE ALSO:

- Sync an Object to the Marketing Cloud
- Automation Studio
- Audience Builder
- Use Decision Splits
- Interact with Synchronized Data Sources

Determine If an Object Can Trigger Journeys

Before you create an event-based journey, check that the object you want to use works. This test helps you identify available objects.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, create a journey.
2. Drag the **Salesforce Data Event** tile onto the canvas.
3. Click the icon to configure the event.
4. Select **Salesforce Data**.
5. In **Select an Object**, look for the object you are interested in. If you don't see an object, it can't be used to trigger a journey.

Sync an Object to the Marketing Cloud

To create an audience-based Journey, sync object data to the Marketing Cloud.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, go to **Audience Builder** > **Contact Builder**.
2. Click **Data Sources**.
3. Click the Synchronized tab.
4. Select the data source.
5. Click **Set Up Object**.
6. Look in the **Synchronize Entity** dialog box with the list of objects that can sync. If you don't see the object, it can't be synced.
7. Click **Synchronize** for the entity that contains the data you want to bring into Contact Builder.
8. Select the checkboxes next to the fields you want to synchronize and click **Next**.
9. Using the **Record Collection** buttons, choose whether to bring in all records or begin at a certain date.
10. From the **Poll Schedule** dropdown, choose how often you wish to synchronize data.
11. Click **Save & Synchronize**.

Community Objects for Creating Member Journeys

Most, but not all, community objects can be used for creating journeys. This list includes the available objects along with a description, their eligibility status, API object, and use cases (as appropriate).

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

A quick note about object status:

- If you want to create an event-based journey, the object must be workflow-enabled.
- To create an audience-based journey, the object must be replicable.

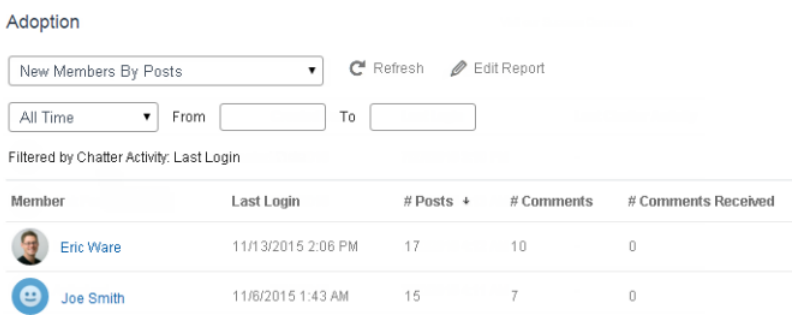
Object	Description	Status	API	Example Use Case
Communities and Membership				
Network	A community and its settings	• Not Workflow-enabled • Not Replicable	Network	
NetworkMember	Individual user memberships	• Workflow-enabled • Replicable	NetworkMember	Triggers when a new member joins the community
NetworkMemberGroup	List of profiles and permission sets added to a community (not related to Chatter groups)	• Not Workflow-enabled • Not Replicable	NetworkMemberGroup	
Chatter Groups				
CollaborationGroup	A Chatter group	• Workflow-enabled • Not Replicable	CollaborationGroup	
CollaborationGroupMember	Member of a Chatter group	• Workflow-enabled • Replicable	CollaborationGroupMember	Triggers when a user joins a Chatter Group in the Community
CollaborationGroupFeed	A single item on a Chatter group feed	• Not Workflow-enabled • Replicable	CollaborationGroupFeed	
Feeds				
FeedItem	Entry in the feed	• Workflow-enabled • Replicable	FeedItem	Triggers when user asks a question or makes another type of feed post

FeedComment	Comment added to a feed by a user	• Not Workflow-enabled • Replicable	FeedComment	
Topics				
Topic	A topic	• Workflow-enabled • Replicable	Topic	
TopicAssignment	Relationship between a topic and an entity	• Workflow-enabled • Replicable	TopicAssignment	Triggers when a user posts a question on a specific topic, or adds a topic to any FeedItem
EntitySubscription	Subscription for following a record or another user	• Not Workflow-enabled • Replicable	EntitySubscription	Triggers when a user follows a topic, user, or record
Cases				
Case	Service case	• Workflow-enabled • Replicable	Case	Triggers when a user opens or updates a case

Insights for Community Engagement

Insights are reports that help your community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage community engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

Example: With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.

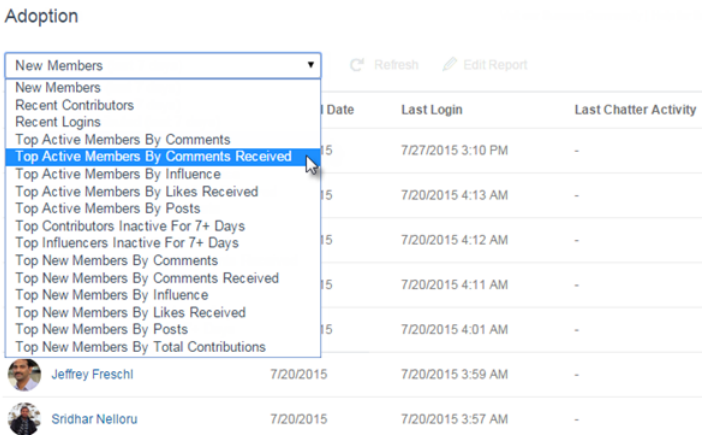


They can also access other reports about members directly from the Insights page using the drop-down menu.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Tip: Let us do the setup work for you! Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

IN THIS SECTION:

Enable and Map Engagement Insights for Community Managers

Community managers can use Engagement Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Engagement Insights from an AppExchange package. You can also create and map your own. Each community can have their own Engagement Insights.

Create Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.

Create Custom Actions for Community Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

View and Customize Engagement Insights for Your Community

Use Engagement Insights in to monitor recent community activity and immediately take action. EngagementInsights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Enable and Map Engagement Insights for Community Managers

Community managers can use Engagement Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Engagement Insights from an AppExchange package. You can also create and map your own. Each community can have their own Engagement Insights.

Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Community Management or Community Workspaces. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

Tip: Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

When you install the package, report folders are automatically installed in your internal org. If you have no previous Engagement Insights mapped, the package automatically maps them for you. You can change the default mappings at any time.

To map or update Engagement Insights for your community:

1. Open Community Workspaces or Community Management.
2. Click **Engagement** > **Settings**. If you are using Community Workspaces, click **Engagement** > **Settings** from the Dashboard workspace.
3. Provide a name for each Engagement Insights page and then select the report folder you want to map to the page.

   You can map up to 10 Engagement Insights pages.

   Make sure that you have shared the mapped report folder with your community managers or they can't view the Engagement Insights reports.
4. Click **Save**.

   Engagement Insights pages are visible to community managers when they expand the Engagement section in Community Management or Community Workspaces.

Go check out your changes. Click Engagement and then click each Engagement Insights page name. Use the dropdown menu to verify the reports mapped to each page.

If you installed the Salesforce Communities Management package, moderation-related Engagement Insights reports are also mapped to pages in the Moderation section of Community Management or in the Moderation workspace of Community Workspaces. Unlike the page names in the Engagement section, the page names in the Moderation section can't be renamed or unmapped.

SEE ALSO:

Share a Report or Dashboard Folder in Salesforce Classic

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To map Engagement Insights in Community Management or Community Workspaces:

- Manage Communities OR Create and Set Up Communities

  AND

  Manage Reports in Public Folders

  AND

  Is a member of the community

Create Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.

Tip: Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

1. Create custom report types based on the Networks object.

   Only reports that are based on the Networks object show community-specific information in Community Management and Community Workspaces.

   Note: You can create reports based on other objects and expose them in Community Management or Community Workspaces. Keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Feed Revisions
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics
     - Unpublished Feed Entities

2. Use the custom report type to create an Insights report.

   Insights reports are just like any other report, except they must also meet the following requirements:

   - The report must be a tabular report.
   - The report can't include pagination.
   - We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management or Community Workspaces.
   - To view "Approve" and "Delete" comment actions, you must add the FeedCommentID column to your Insights report.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create custom report types:
- Manage Custom Report Types

To create, edit, and delete reports:
- Create and Customize Reports

To create and share report folders:
- Manage Reports in Public Folders

3. Save the report to a new report folder that you can map to in Community Management or Community Workspaces.

   We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called `Insights Members` and another called `Insights Moderation`.

   Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Community Management or Community Workspaces.

4. Share your Insights report folder with your community managers.
5. In Community Management or Community Workspaces, click **Engagement** > **Settings** to map Insights pages to your report folder.

When a community manager accesses Community Management or Community Workspaces, the Insights reports appear in the drop-down menu on the mapped Engagement page.

Note: Some Insights are not available in Developer Edition or sandbox orgs.

SEE ALSO:

- Create a Custom Report Type
- Create a Report
- Track Community Activity with Custom Reports
- Share a Report or Dashboard Folder in Salesforce Classic
- Create Custom Actions for Community Insights

Create Custom Actions for Community Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action:

1. Create a Visualforce page.

   There are a few options you can use:

   - Use a standard controller

     Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.

   - Use a standard list controller

     Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

   - Use a controller extension that uses Apex

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:
- Customize Application

To edit custom Visualforce controllers:
- Author Apex

Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or Web services, or if you need finer control for how information is accessed for your page.

All options work with standard objects and custom objects.

For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

   Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

   a. Open Community Workspaces or Community Management.

   b. Navigate to the Insights report that you want to apply your new custom action to.

   c. On the report, click and then add your custom action from the picklist.

3. Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.

Example: Here's an example of a custom action to delete all activity from a community member. This custom action is great for cleaning up the community after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following `DeleteAllActivityControllerExtension` class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {

    private List<Id> ids;
    private String retURL;
    private Database.DeleteResult[] deleteResult = null;
    private Map<String, String> resultMap;
    private String success = 'success';
    private String failure = 'failure';

   public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
 {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
       //The return URL to the Insights page is passed in a parameter called "retURL"

        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    }

    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
 you click the action.
        PageReference retPage = new PageReference(retURL);
```

```
        retPage.setRedirect(true);
        Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
        retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
   }

   private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
            }
        }
   }

   private void deleteFeedComments() {
       List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
 CreatedById IN :ids];
        deleteResult = Database.delete(feedComments, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                       resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
 failure);
                    }
                }
            }
        }
   }

   private Integer calculateFailureCount() {
       Integer failureCount = 0;
       for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
        }
        return failureCount;
   }

}
```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.

Note:

- This code example doesn't include any permission checks. This custom action only works for admins.
- The IDs for the items you selected on the Insights report are passed to the Visualforce page using the `idsList` parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page:

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

SEE ALSO:

Salesforce Help: Visualforce Pages as Global Custom Actions

Visualforce Developer Guide: Standard Controllers

Visualforce Developer Guide: Standard List Controllers

Visualforce Developer Guide: Building a Controller Extension

View and Customize Engagement Insights for Your Community

Use Engagement Insights in to monitor recent community activity and immediately take action. EngagementInsights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Each Engagement Insights page includes multiple reports. You can access these reports using the dropdown menu on the page. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

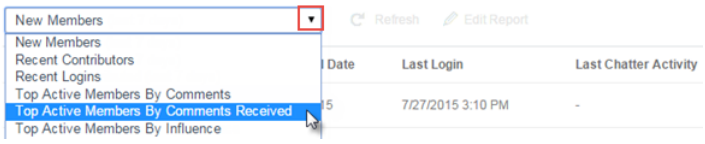
Engagement Insights are powerful tools that you can use to perform mass-actions. For example, if a spammer attacks your community, you can select all the offending posts and click **Delete Post**.

Important: Some Engagement Insights actions require special permissions. If you can't perform an action, let your admin know.

1. Open Community Workspaces or Community Management.
2. Click Engagement or Moderation.

   Note: Your admin maps Engagement Insights pages. If the Engagement section isn't visible or the Moderation section doesn't include any Engagement Insights pages, your admin hasn't mapped them yet.

   Pages with mapped report folders appear when you expand the sections.
3. Click the Engagement Insights page you want to view.
   - To access other Engagement Insights reports, use the dropdown menu.



   - Take action! Only the first two actions are displayed on the page. To see more actions, click next to the displayed actions. You can select up to 100 rows at a time.
   - To filter the report by relative and custom date ranges, use the dropdown date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.
   - To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.
   - To edit or customize the report, click to open the report in your internal org. From there you can customize the report to fit your community needs, such as adding or removing columns and updating the report filters.

     Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.
   - To edit the actions assigned to a page, click to open the Edit Engagement Insights Actions page.

     Actions that appear on the Engagement Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view Engagement Insights in Community Workspaces or Community Management:

- Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To customize Engagement Insights reports:

- Create and Customize Reports

returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

Each Engagement Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Engagement Insights report must have at least one action. Actions displayed in the picklist on the Edit Engagement Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Engagement Insights reports for your community are automatically refreshed when you access them. You can also force an update.

SEE ALSO:

Create Custom Actions for Community Insights

What's the difference between Engagement Insights and dashboards?

Community Moderation Strategies and Tools

Community moderation allows you to empower members of your community to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. It's also critical to empower members to speak up when they view something as inappropriate or offensive.

With Communities moderation, you can:

- Designate specific users as moderators so that they can closely monitor the community
- Allow members to flag posts, comments, files, and messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your community

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To limit the size and types of files allowed in your community, go to **Administration** > **Preferences**.

To report on moderation activity in your communities, you can use the preconfigured Audit Trail Insights report provided in Salesforce Communities Management package. You can also query the flagged content or activity using the API, or create a custom report type using `Networks` as the primary object. For more information about the Salesforce Communities Management package, see Report on Communities with the AppExchange Packages for Community Management.

Note: Changes to a feed item's status are not included in the Audit Trail Insights report.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, community moderation offers some of the same functionality. Transaction Security and communities moderation can be used at the same time.

IN THIS SECTION:

Track Community Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles in the Moderation Overview page of Community Management and Community Workspaces. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the community feed, in Community Workspaces, or in Community Management.

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Moderate Flagged Discussions in Your Community

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Moderate Flagged Direct Messages in Your Community

Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

Community Pulse

Community Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create new ones to meet your needs.

Communities Moderation Limits and Limitations

Community moderation limits ensure that your community performs optimally.

SEE ALSO:

Assign a Community Moderator

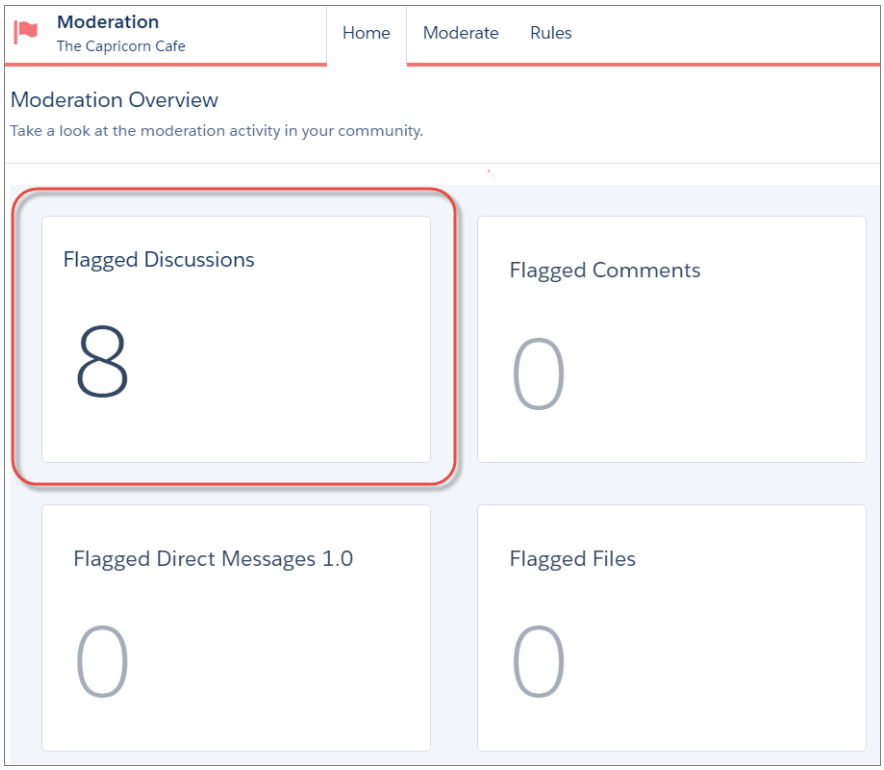
Assign a Community Manager

Limit Files in Your Community

Track Community Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles in the Moderation Overview page of Community Management and Community Workspaces. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

Example: To view all flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tip: Let us do the setup work for you! Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

This setting isn't required to flag or moderate items using the API.

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Preferences**, then select `Allow members to flag content`.
3. Click **Save**.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.
- Members can flag messages from within the community on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from communities they are members of.

  Note: Messages can't be flagged in partner or customer portals, your internal organization, or from the Salesforce app.

- Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable community user flagging (allow community members to flag items):

- Create and Set Up Communities

  AND

  Is a member of the community

SEE ALSO:

Assign a Community Moderator

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Plan Your Use-Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your community from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that targets users without community contributions.
- Do you want to moderate your internal users' activity in your community? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have community contributions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Before creating content criteria, think about what you want to moderate.

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.
- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

IN THIS SECTION:

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes `BadWord`, it's matched when a user types `BADWORD` or `badword.`

Set up content criteria to use in your moderation rules:

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access Moderation by clicking **Moderation** > **Content Criteria** > **New**. If you're using Community Management, access Moderation by clicking **ModerationContent Criteria.**
3. Enter a name, unique name, and description for your criteria.
4. Click **Save**.
5. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
   - Wildcard characters aren't supported.
   - Separate keywords with commas or line breaks.
   - When adding keywords, you can copy and paste up to 32,000 characters at a time.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

```
bad-word
b@dword
b a d w o r d
```

To delete keywords, select the keywords you want to remove, then click **Delete**.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria is being used by a rule, you can't delete it.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per community.
- Each member criteria can include up to 100 user conditions.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. Open Community Workspaces or Community Management.
2. Click **ModerationMember Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

   You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

   If you delete a profile in your internal org, the profile is also removed from your member criteria.
5. Select to filter your members by:
   - `None`—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
   - `User creation date`—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

     Note: A user's creation date might not be the same date they became a member of the community. For example, you can have an internal user that was created 120 days ago who became a member of the community 5 days ago. For users that self-register, their creation date is the date they become a member of the community.
   - `Members without community contributions`—Select this option to include only members that haven't posted or commented in the community. Posts that are pending review don't count as community contributions until they are approved.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

Example: Let's look at the following conditions:

`User Types`: Partner

`User Profiles`: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

`Filter By`: User creation date is set to 7 days since the user was created

This member criteria applies to:

- Partner users created in the last 7 days
- Customer Community Plus Login User created in the last 7 days
- Customer Community Plus User created in the last 7 days
- Customer Community User created in the last 7 days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria is being used by a rule, you can't delete it.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize Preconfigured Moderation Rules
If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

Create Content Rules to Moderate Your Community
Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

Create Rate Limit Rules to Moderate Your Community
Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the guidelines of the community.

Customize Preconfigured Moderation Rules

If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last the rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

1. Open Community Workspaces or Community Management..
2. Click **Moderation** > **Rules** > **Moderation Rule**, then click **Edit** next to the rule that you want to modify.
3. If the rule meets your requirements, simply click **Activate**. Or you can customize the following fields:
   - **Name**—Change the name of your rule.
   - **Unique Name**—Enter a unique name for your rule. The unique name used by the API.
   - **Description**—Optionally, change the description.
   - **Activate Rule**—Select to activate rule.
   - **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - **Moderation Action**—Change what you want to happen when the criteria is matched.
     - **Block** prevents the content from being published.
     - **Review** allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's published.
     - **Replace** publishes the content with the keywords replaced as asterisks. For example, `BadWord` becomes `*******`.
     - **Flag** publishes the content and then automatically flags the content as inappropriate.
   - **Message for Member**—Change the existing pop-up message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use `%BLOCKED_KEYWORD%` or other inappropriate words in this community. Review your content and try again." The `%BLOCKED_KEYWORD%` variable displays up to 5 blocked words. You can also use this variable in your own custom message.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Tip: For international communities, you can translate this message. From Setup, enter `Translate` in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.

- **Member Criteria**—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- **Content Criteria**—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to? A list of banned keywords has been created for you and is preselected for the rule. You can add or remove terms from the list by clicking **Content Criteria**and clicking **Banned Keywords**.

4. Click **Save**.

A few things to bear in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Prevents members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

If your community uses the Customer Service template, moderation rules apply to questions and group posts created by your community members. If you community uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

You can also use the Metadata API or Tooling API to set up content rules.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.

Tip: Before creating a rule, we recommend that you create criteria to use in the rule.

1. Open Community Workspaces or Community Management.
2. Click **ModerationRules**, then click **New** and select **Content Rule**.
3. Complete the following fields:
   - `Name`—Enter a name for your rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

- `Unique Name`—Enter a unique name for your rule. The unique name used by the API.
- `Description`—Optionally, enter a description.
- `Activate Rule`—If selected, the rule is activated.
- `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
- `Moderation Action`—Specify what you want to happen when the criteria is matched.
  - `Block` prevents the content from being published.
  - `Review` allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's published.
  - `Replace` publishes the content with the keywords replaced as asterisks. For example, *`BadWord`* becomes `*******`.
  - `Flag` publishes the content and then automatically flags the content as inappropriate.
- `Message for Member`—Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use *`%BLOCKED_KEYWORD%`* or other inappropriate words in this community. Review your content and try again." The *`%BLOCKED_KEYWORD%`* variable displays up to 5 blocked words. You can also use this variable in your own custom message.

  Tip: For international communities, you can translate this message. From Setup, enter *`Translate`* in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.
- `Member Criteria`—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- `Content Criteria`—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?

Important: Keep the following things in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Prevents members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments

  Yikes! Be careful.
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

4. Click **Save**.

SEE ALSO:

Translate Terms

Create Content Criteria to Moderate Your Community

Create Member Criteria to Moderate Your Community

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In communities that use the Customer Service template, this includes questions and answers.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each rate rule can have up to 10 member criteria.

Tip: Before creating a rule, we recommend that you create member criteria to use in the rule.

1. Open Community Workspaces or Community Management.
2. Click **ModerationModerationRules**, then click **New** and select **Rate Rule**.
3. Complete the following fields:
   - `Name`—Enter a name for your rule.
   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API.
   - `Description`—Optionally, enter a description.
   - `Activate Rule`—If selected, the rule is activated.
   - `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
   - `Member Criteria`—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to?

     Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last 7 days.

     Note:
     - Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules don't apply to them.
     - If you activate a rate rule without specifying member criteria, the rule applies to all external users.

   - `Content Creation Time Frame`—Select the time frame you want to use.
   - `Notify Moderators`—Enter a number. Moderators are sent an email when a member creates this much content in your set time frame.
   - `Freeze Members`—Enter a number. Members are frozen when they create this much content in your set time frame.

     Important: When members are frozen, they're frozen in all communities that they're a member of.

   Emails are sent to users with the "Moderate Community Users" permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.
4. Click **Save** to apply your changes.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete rules:
- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Example: Let's use the following rate rule as an example.

`Applies To`: Posts and private messages

`Member Criteria`: Customer users created in the past 7 days

`Content Creation Time Frame`: 3 minutes

`Notify Moderators`: 6

`Freeze Members`: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✔	✖
6 posts	✔	✖
6 comments	✖	✖
8 posts and 2 private messages	✔	✔
10 posts	✔	✔
10 comments	✖	✖

A rate rule with these values protects the community from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

`Applies To`: Private messages

`Member Criteria`: Customer users created in the past 3 days

`Content Creation Time Frame`: 15 minutes

`Notify Moderators`: 1

`Freeze Members`: 3

This rate rule protects the community from spammers that attack via private messages.

My rate rule didn't do anything. What's going on?

Give it time. Rate limit rules might not seem exact, but they are. Trust us. For example, say you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without community contributions. After a members first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

SEE ALSO:

Create Member Criteria to Moderate Your Community

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules to review and approve content execute before database saves. These rules execute before rules that replace content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

SEE ALSO:

Apex Developer Guide: Triggers and Order of Execution

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the guidelines of the community.

Members can post or comment on any record types that have a feed. The moderation rules configured for your community catch any posts or comments that don't meet the rules' criteria. Flags on a record feed are only visible from within the community that flags them. You can also turn off moderation rules for internal users so that their feed activity isn't flagged.

1. Enter **Communities Settings** in the Quick Find / Search bar.
2. Click the box next to **Moderation applies to all feed posts regardless of where they are visible**.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

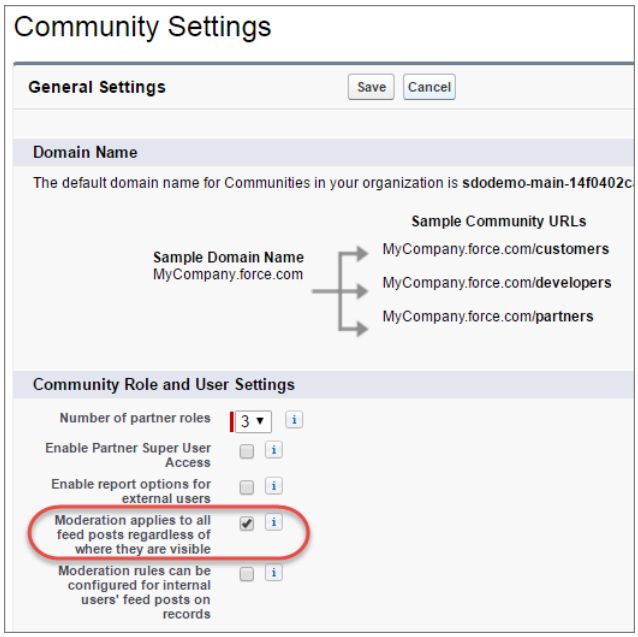
To view, create, edit, and delete rules:

- Create and Set Up Communities

  AND

  Is a member of the community

Example: Enable Record Feed Moderation from Communities Settings



Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the community feed, in Community Workspaces, or in Community Management.

Note: The "Can Approve Feed Post and Comment" permission applies not only to moderation but also to any Chatter feed a user can access. In other words, an assigned user can edit or delete any post or comment. They can take these actions whether in a community or their internal Salesforce org, in any feed they have access to.

To set up a moderation rule to review and approve posts and comments, go to **ModerationRules** and create a content rule that uses the `Review` action. Here are some ways that you can use rules to review content:

Self-Service Community

Does your community allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your community? Use member criteria that includes only your guest user profile and filters for members that have never contributed to the community.

Partner Community

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employee Community

Does your community require HIPAA compliance? Set up your rules to review posts and comments from all your employees.

Note: Users must have Manage Communities or Create and Set Up Communitiespermissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments in your community:

- Use a preconfigured Insights report in Community Workspaces or Community Management.

  Use the Pending Insights report provided in the Salesforce Communities Management package. This report lets you see all the posts and comments that are pending review in your community. The Insights report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review:

Note: An author can see a pending comment on a pending post only if the author posted both.

- Can Approve Feed Post and Comment

To approve, delete, or edit posts and comments that are pending review in Community Workspaces or Community Management:

- Can Approve Feed Post and Comment

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

- Approve posts and comments directly in the community feed.

  In the community feed, users with the "Can Approve Feed Post and Comment" permission see an extra action in the post or comment drop-down menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

SEE ALSO:

Create Content Rules to Moderate Your Community

Feed Post and Comments Editing Overview

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and act on it.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged posts and comments:

- View flagged posts and comments from the Moderation Overview Home App in the Flagged Discussions queue on page 594.
- Use a preconfigured Insights report in Community Management.

  If you have not enabled Community Workspaces, use the Flagged Comments and Flagged Discussions reports provided in the Salesforce Communities Management package. These reports let you quickly manage your community's flagged posts and comments. You can see the content of the post or comment and then remove the flag or delete it. You can also select multiple items at once.

- Use the flagged feed in Chatter.

  If you're using a Salesforce Tabs + Visualforce community, you can see a list of flagged posts and comments using the Chatter menu in your community. The `Allow members to flag content` preference must be enabled to see the Flagged feed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Communities Feeds

To moderate posts and comments in Community Workspaces or Community Management:

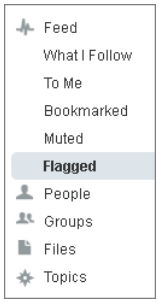
- Access Community Management ORModerate Communities Feeds

  AND

  Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community



- Moderate using a custom list. You can expose a list of flagged posts and comments using the Chatter REST API or ConnectApi in Apex.
- Click the link to the post or comment from the notification email.
- Moderate directly within context of the community by removing flags or deleting content in the feed.

Tip: To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

SEE ALSO:

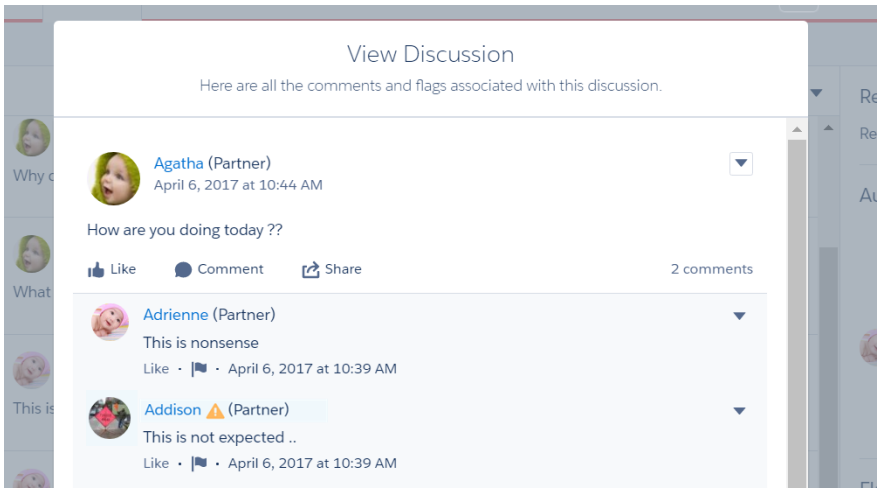
Chatter REST API Developer Guide

Apex Developer Guide

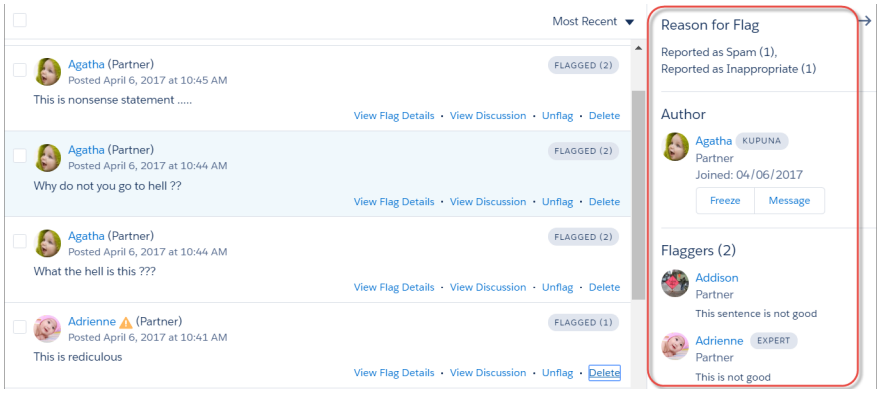
Moderate Flagged Discussions in Your Community

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context (including all comments related to a post) and sort by the newest discussions or the oldest. Click **View Discussion** to open a discussion thread.



Click a post or comment or select **View Flag Details** to see how a post or comment has been flagged and who flagged it.



Want to know more about the author of a flagged post? We've got you covered. You can see which authors have a history of flagged posts and how many times a moderator has deleted their posts. If necessary, freeze the author and send them a message from the same page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Communities Feeds

To moderate posts and comments in Community Workspaces or Community Management:

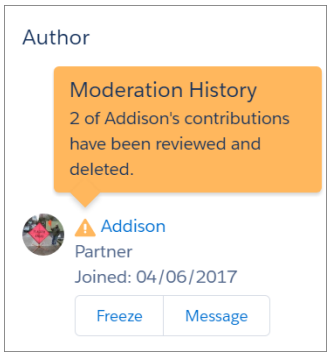
- Access Community Management ORModerate Communities Feeds

  AND

  Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community



A few things to keep in mind:

- The Flagged Discussions queue is available only in organizations that have enabled Community Workspaces on page 20.
- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

Want to see what's going on in your community overall? Install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or offensive content. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if `Allow members to flag content` is enabled for their community.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged files:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management or Community Workspaces.

  Use the Flagged Files report provided in the Salesforce Communities Management package. This report lets you see the name of the flagged file, who created it, who flagged it, and how many flags the file has. You can click a link to open the file and review the content. Then you can remove the flag or delete the file. You can also select multiple items at once.

  To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.
- Moderate using a custom list. You can expose a list of flagged files using the Chatter REST API or ConnectApi in Apex.
- Moderate directly within context of the community by removing flags or deleting content on the file detail page.

Tip: To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

To limit the size and types of files allowed in your community, go to **Administration** > **Preferences**.

SEE ALSO:

Chatter REST API Developer Guide

Apex Developer Guide

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:

- Moderate Communities Files

To moderate files in Community Management:

- Moderate Communities Files

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Moderate Flagged Direct Messages in Your Community

Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.

Note: Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication in communities. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

The "Moderate Communities Chatter Messages" permission allows moderators to see the contents of flagged direct messages, remove flags, and delete flagged messages.

1. If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.
2. Open Community Workspaces or Community Management.
3. In Community Management, go to **Moderation** > **Flagged** and select **Direct Messages** from the dropdown menu to filter the flagged items.
4. Review and act on the flagged messages.

Tip: If you want to receive an email each time a message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Manage Chatter Messages and Direct Messages" permissions. To set your email preferences, go to your profile page within a community, click the dropdown button in the upper-right corner, and select **My Settings**, then click **Email Settings**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view and moderate flagged direct messages in Community Management or Community Workspaces:

- Moderate Communities Chatter Messages

  AND

  Moderate Chatter Messages and Direct Messages

  AND

  Moderate Communities Feeds

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To make all posts available to moderation, including direct messages, in Communities Settings under Community Moderation Rule Settings:

- Moderation applies to all feed posts regardless of where they are visible

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

The "Moderate Communities Chatter Messages" permission allows users to see the contents of messages, remove flags, and delete messages only in communities they're a member of. With this permission, only flagged messages can be deleted. The "Modify All Data" permission allows moderators to remove flags or delete a message in the SOAP API.

Ensure that your moderators are assigned the "Moderate Communities Chatter Messages" permission, *not* the "Manage Chatter Messages" permission. The "Manage Chatter Messages" permission allows users to see *all* the messages in your entire Salesforce org. Avoid security and privacy concerns; double-check that your moderators and managers have the right permission.

Important: Keep these limitations in mind:

- Community members can't flag messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
- Users can't flag messages in your internal organization, in the Salesforce app, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management or Community Workspaces.

  Use the Flagged Private Messages report provided in the Salesforce Communities Management package. This report lets you track trends and stay on top of message spamming attacks in your community. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to unflag messages and delete messages.

  To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

- Create your own report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.

- Directly query the flagged messages from the API and then delete them.

Tip: If you want to receive an email each time a message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Moderate

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To moderate messages in Community Management or Community Workspaces:

- Moderate Communities Chatter Messages

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To view the contents of a flagged message in reports:

- Moderate Communities Chatter Messages

To remove flags or delete messages in the SOAP API:

- Modify All Data

Communities Feeds" permissions. To set your email preferences, go to your profile page within a community, click the dropdown button ( ) in the upper-right corner and select **My Settings**, then click **Email Settings**.

SEE ALSO:

Guidelines for Deleting Your Users' Chatter Messages

Report on Communities with the AppExchange Packages for Community Management

SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

Tip: Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Workspaces or Community Management. For more information, see Community Moderation Rules.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags in Community Workspaces or Community Management, query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on either FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create triggers:
- Modify All Data

Example: This trigger automatically flags posts in your community that contain *BadWord*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {

    List<NetworkModeration> flags = new List<NetworkModeration>();

    for (FeedItem rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope)){
            continue;
        }

        if (rec.body.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()) {
        insert(flags);
```

```
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert) {
    List<NetworkModeration> flags = new List<NetworkModeration>();

    for (FeedComment rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope)) {
            continue;
        }

        if (rec.commentBody.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()){
        insert(flags);
    }
}
```

SEE ALSO:

SOAP API Developer Guide

Community Pulse

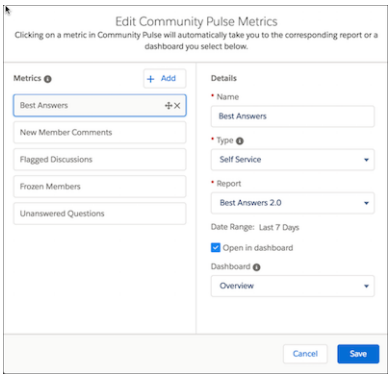
Community Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create new ones to meet your needs.

To get started, map reports and dashboards to your Workspaces. You can either map manually or install the Winter '18 or later version of the AppExchange package. After installation, Community Pulse displays automatically. If you have a Community with Chatter, four tiles display once you install the package: Members, New Members, Unanswered Questions, and Flagged Discussions.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To customize a metric tile, click **Edit Metrics**. From here, create a metric or edit an existing one. You can have up to six metrics at a time.



By design, clicking a metric opens the corresponding report. However, selecting **Open in dashboard** lets you open a dashboard instead.

SEE ALSO:

Enable and Map Dashboards for Community Managers

Enable and Map Engagement Insights for Community Managers

Communities Moderation Limits and Limitations

Community moderation limits ensure that your community performs optimally.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- Your org can have up to 100 member criteria. This limit is per org, not per community.

Rule Limits and Limitations

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

Audit Limitations

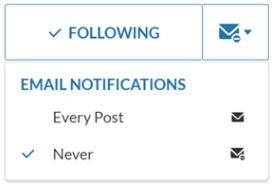
Changes to a feed item's status are not included in the Audit Trail Insights report.

Organize Communities with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in a community. Use topics to structure your community content or highlight key discussions. You can create topics or use the topics that organically emerge from community member posts.

Choose navigational topics and subtopics to provide a consistent map of your community. Use featured topics to highlight current, popular conversations. Use content topics to organize your original content. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

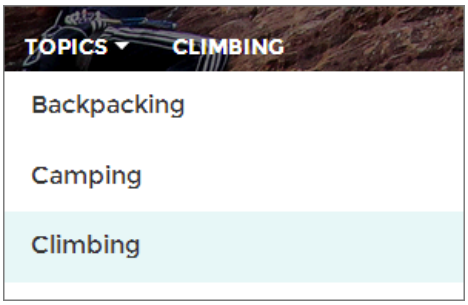
Community members can keep up-to-date on topics by following them and, optionally, receiving email notifications for topics they follow.



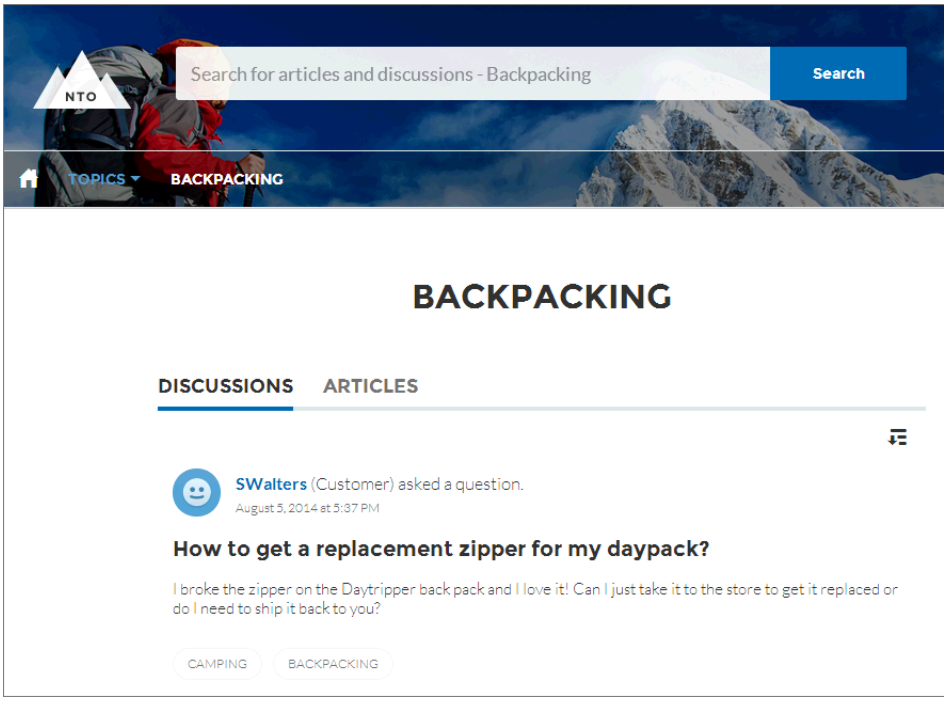
When members choose Every Post, they get notifications when a post or question is added to the topic. They don't get notifications when the hashtag topic is added to a comment, answer, or record feed.

Navigational Topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.



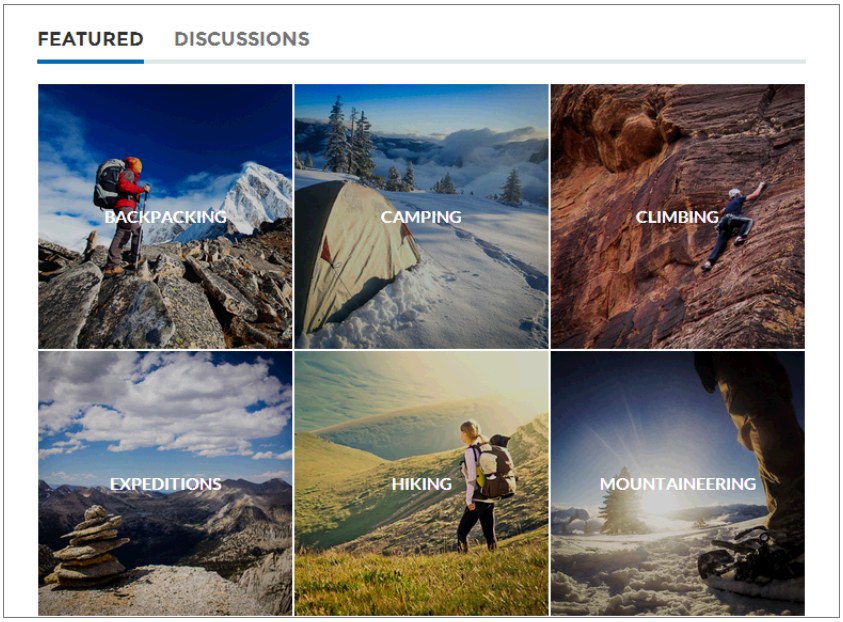
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



Note: Properties on the Ask and Contact Support & Ask components let you block selection of a new topic when a user asks a question. For more information, see Ask Button and Contact Support & Ask Buttons.

Featured Topics

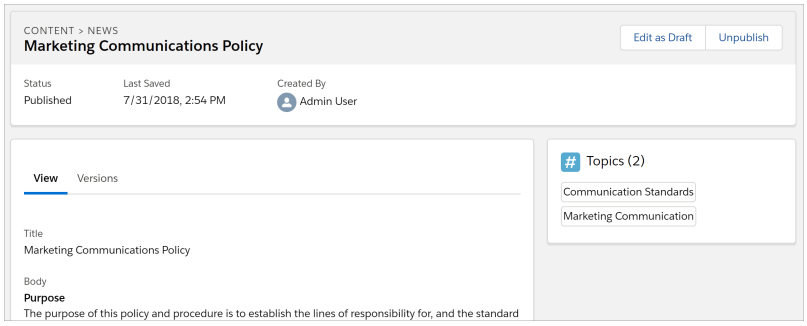
Featured topics are accessible from the body of your community home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Community Builder appears.)



Content Topics (Beta)

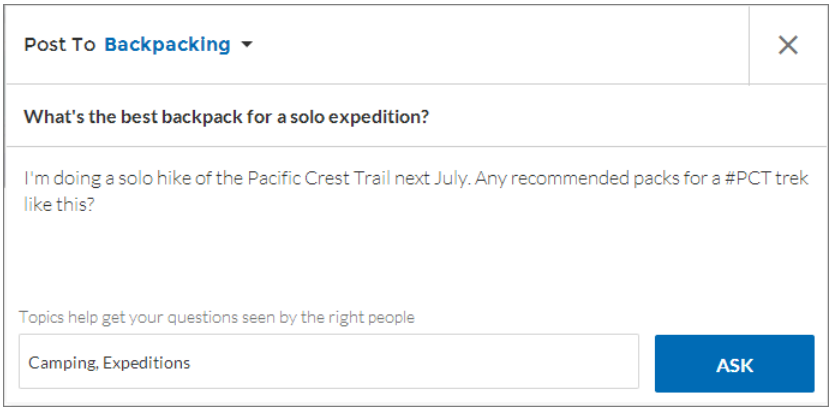
Note: Salesforce CMS is a beta feature. Communities admins, Salesforce admins, content managers, and content admins can access this beta feature in the Salesforce App Launcher and in the Content Management workspace of any community. You can provide feedback and suggestions for Salesforce CMS in the Community Cloud group in the Trailblazer Community.

Content topics allow you to organize your original content around common themes. Enable topics that you're already using for content, or create topics and enable them for content. After topics are enabled for content, assign them to your native content.



Member-Created Topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search or highlighted as featured topics.

Topic Metrics

Community members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, community members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their communities or consolidate similar topics based on usage.

IN THIS SECTION:

Manage Topics in Communities

As the number of topics in a community grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your community by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. And articles added to the data category in the future will also be tagged.

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

Set Up Content Topics (Beta)

Content topics organize your original content around common themes.

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

Translate Topics Names and Descriptions for Communities with International Audiences
Use the Translation Workbench to translate topic names and descriptions in international communities.

Manage Topics in Communities

USER PERMISSIONS	
To access Community Workspaces or Community Management page:	Manage Communities OR Create and Set Up Communities
To create topics:	Create Topics
To merge topics:	Merge Topics
To delete topics:	Delete Topics
To edit topics:	Edit Topics

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

As the number of topics in a community grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

1. Open Community Workspaces or Community Management.

   Tip: If you want to create content topics or enable topics for content, use Community Workspaces.

2. If you're using Community Workspaces, access topics by clicking **Content Management** > **Topics**. If you're using Community Management, access topics by clicking **Topics** > **Topic Management**.
3. Do one of the following.
   - To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description to boost SEO. If you want to be able to associate the topic with native content, select **Enable for content**.
   - To combine topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded. If you merge a topic with a content topic, the content associations are preserved.
   - To enable up to 10 topics for content at the same time, select the topics and click **Enable for Content**.

     After enabling topics for content, you can associate the topics with your native content.
   - To edit a topic in Community Workspaces, click and select **Edit**. In Community Management, click .

     If you deselect **Enable for content** when editing a topic that is associated with content, saving your changes removes the associations.
   - To see a topic detail page in your community, click the topic name.
   - To delete a topic in Community Workspaces, click and select **Delete**. In Community Management, click .

   If you don't see a topic you're looking for, you can search for it.

Tip: For communities with a global audience, you can translate names and descriptions of topics.

SEE ALSO:

- Set Up Navigational Topics
- Set Up Featured Topics
- Set Up Content Topics (Beta)

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your community by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. And articles added to the data category in the future will also be tagged.

To use automatic topic assignments, enable Community Workspaces in Community Settings.

1. Open Community Workspaces.
2. Access automatic tTopic assignments by clicking **Content Management** > **Topics** > **Automatic Topic Assignment**.
3. Enable **Automate Topic Assignment**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces:

- Manage Communities

  OR

  Create and Set Up Communities

  AND

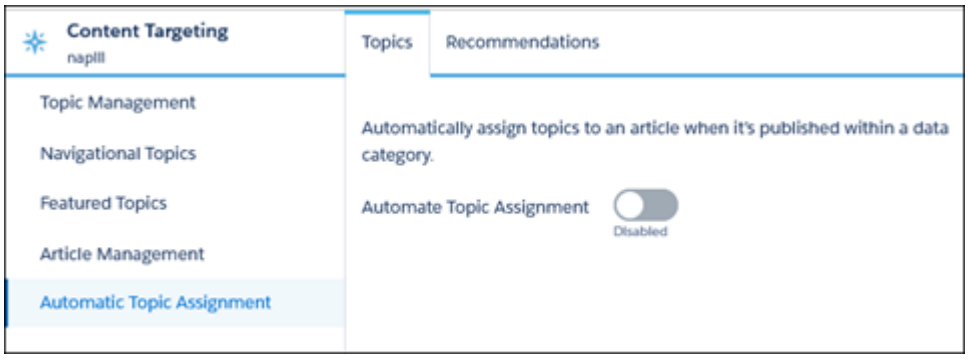
  Is a member of the community

To set up automatic topic assignments:

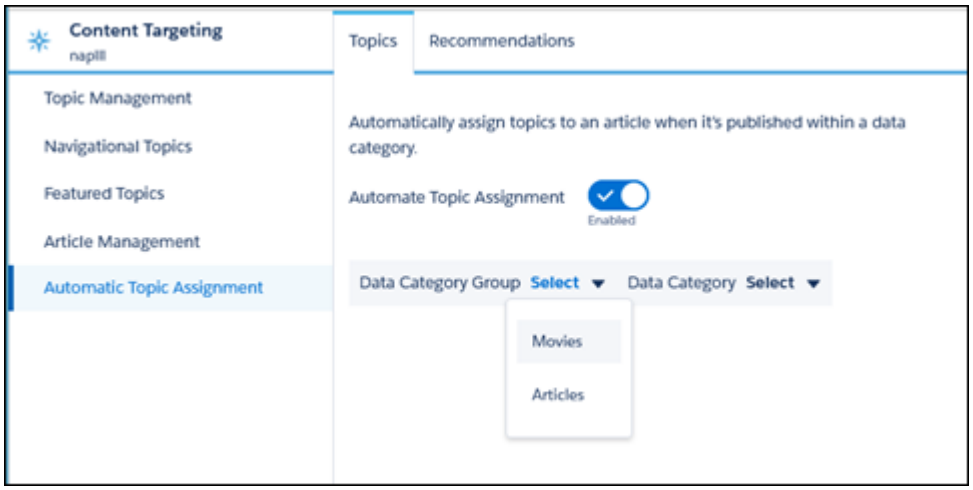
- Edit Topics

  AND

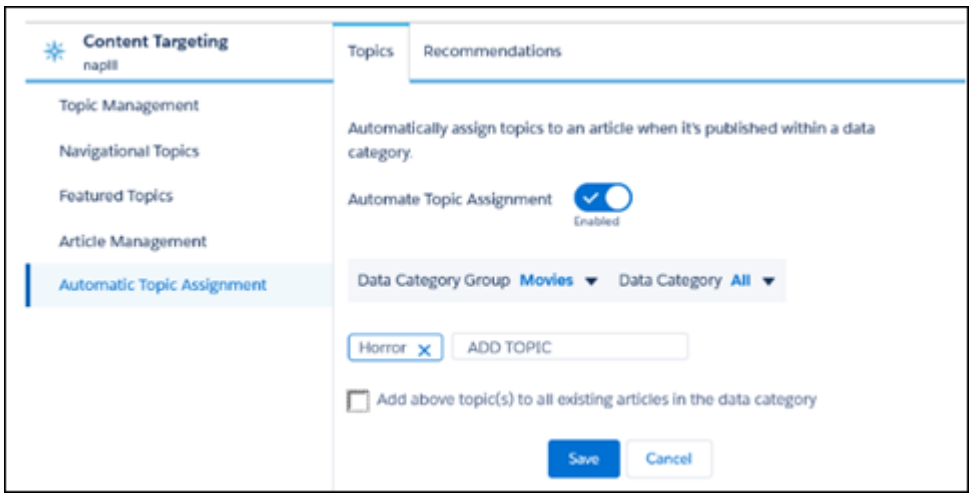
  View Data Categories



4. Select a data category group and a data category.



5. Add the topics that you want to assign to the articles under that data category.



6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.
7. Click **Save**.

Consider the following as you set up your topic assignment rules.

- Topic assignments are community-specific. If you use the same article in two different communities, set up automatic assignments in both communities.
- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.
- You can't automatically remove topics from articles. Instead, you must manually remove topics.
- If you merge two topics, you must set up new rules.
- If you automatically add a topic to a data category, the topic is added to all articles in the data categories above it in the hierarchy. Topics aren't automatically added down a hierarchy to child data categories.

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access featured topics by clicking **Content Management** > **Topics** > **Featured Topics**. If you're using Community Management, access featured topics by clicking **Topics** > **Featured Topics**.
3. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

   Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.

4. Hover over a topic name, and click . Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.

   (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)

5. Repeat steps 3 and 4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

To edit featured topics, hover over a topic name.

- To move topics up or down, click the arrows at left.
- To delete topics or change their thumbnail images, click .

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management page:

- Manage Communities

  OR

  Create and Set Up Communities

  AND

  Is a member of the community

To set up featured topics:

- Edit Topics

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**, and enable topics for all the article types you want to include.

   Note: Enabling topics disables public tags on articles. Personal tags aren't affected.

2. Open Community Workspaces or Community Management.
3. If you're using Community Workspaces, access navigational topics by clicking **Content Management** > **Topics** > **Navigational Topics**. If you're using Community Management, access navigational topics by clicking **Topics** > **Navigational Topics**
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the dropdown menu (under Show subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your organization uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

   Important: This process adds only current articles to a topic. To add new articles, return to Community Management or Community Workspaces and repeat the previous step.

6. Hover over a topic name, and click . Then click **Upload banner image** and select an image that appears across the top of the topic page.

   (Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.)

7. Repeat steps 4–6 to create several navigational topics for your community. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.
   This table shows the maximum number of navigational topics and subtopics you can create in the UI of a Customer Service community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

With Chatter REST API or Chatter in Apex, you can create an additional five levels, each with 10 subtopics, for a total of 2,775 navigational topics.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management page:

- Manage Communities

  OR

  Create and Set Up Communities

  AND

  Is a member of the community

To set up navigational topics:

- Create Topics

  AND

  Edit Topics

To add articles to topics:

- View Data Categories

  AND

  Read on related article types

Tip: To edit navigational topics, hover over a topic name.

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click .

SEE ALSO:

See Your Community's Topics and Subtopics in One Place

Set Up Content Topics (Beta)

Content topics organize your original content around common themes.

Note: Salesforce CMS is a beta feature. Salesforce admins, content managers, and content admins can access this beta feature in the Salesforce App Launcher and Communities administrators can do so in the Content Management workspace of any community. You can provide feedback and suggestions for Salesforce CMS in the Community Cloud group in the Trailblazer Community.

1. Open Community Workspaces.

   You can view and edit content topics in Community Management, but you can't create content topics or enable topics for content in Community Management.

2. Access topics by clicking **Content Management** > **Topics**.
3. Select **All Topics** > **All Content Topics**.
4. To create a content topic, click **New**.
5. Enter a name and description. Select **Enable for content**.
6. Repeat steps 4 and 5 to create several content topics for your community, up to a maximum of 25.

   Alternatively, use the All Topics list and select up to 10 topics at a time and click **Enable for Content**.

After a topic is enabled for content, you can associate the topic with your native content.

To edit or delete a content topic, click in the topic row and select **Edit** or **Delete**.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces page:

- Manage Communities

  OR

  Create and Set Up Communities

  AND

  Is a member of the community

To set up content topics:

- Create Topics

  AND

  Edit Topics

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

The topic catalog shows the hierarchy of navigational topics you've created for the community. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

How is the topic catalog useful to your community members?

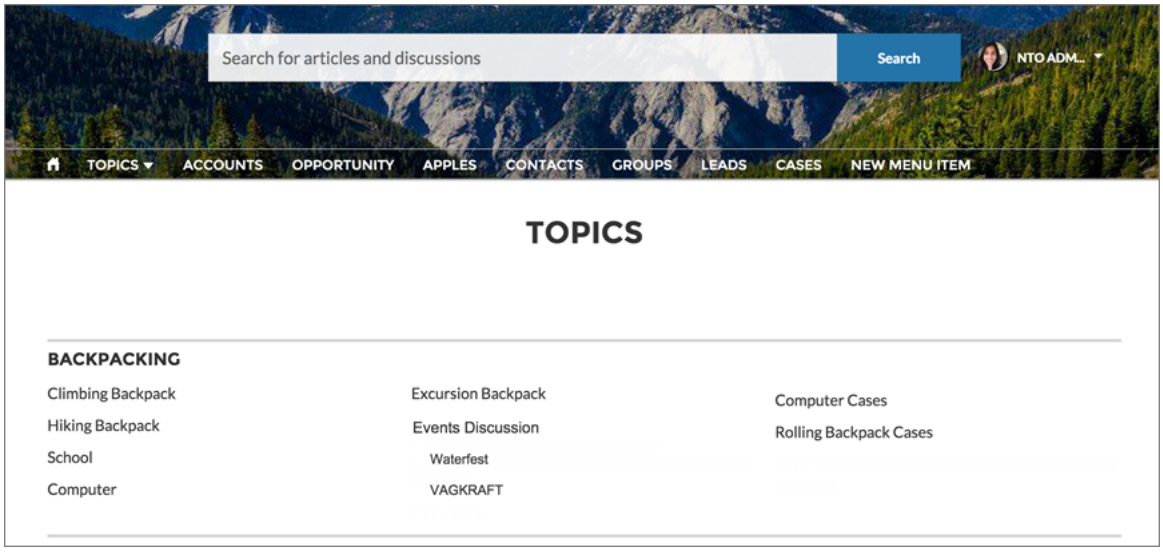
- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.

- Any community user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select **Add the "More Topics..." link** when editing the navigation menu on the home page. The link appears when you have at least one subtopic.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your community's pages, drag the Breadcrumb component to the page in Community Builder.

Example:



SEE ALSO:

Set Up Navigational Topics

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access topics by clicking **Content Management** > **Topics** > **Article Management**. If you're using Community Management, access topics by clicking **Topics** > **Article Management**.
3. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
4. Click an article, and then type to assign topics, or click existing ones to remove them.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management page:

- Manage Communities

  OR

  Create and Set Up Communities

To add or remove topics:

- Create Topics

Translate Topics Names and Descriptions for Communities with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international communities.

1. From Setup, enter *Translate* in the Quick Find box, then select **Translate**.
2. Select the language you're translating into.
3. Select **Managed Topic** for the Setup Component.
4. For Aspect, select **Field Label** for the topic name, and **Description** for the topic description.
5. In the Community Name column, expand a community to see its master topic names.
6. To enter language-specific names for topics, double-click in the Topic Name Translation column. For descriptions, double-click in the Topic Description Translation column.

   Consider the following when you're using the Translation Workbench:

   - There's no Metadata API support for translated topic names or descriptions.
   - While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
   - Modifying topic names from Community Workspaces or Community Management only changes the English community. All translated topic name and description changes must be made using the Translation Workbench.
   - If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.
   - When topics names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To translate topics:

- View Setup and Configuration

  AND

  Be designated as a translator

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

1. Open Community Workspaces or Community Management.
2. Open Recommendations.
   - In Community Workspaces, select **Content Management** > **Recommendations**.
   - In Community Management, select **Recommendations** > **Recommendations**.
3. Select **Default Channel** or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the community.

   Default Channel
   Recommendations in the default channel appear in predefined locations, such as the Home and Question Detail pages in Customer Service and Partner Central communities.

   Custom Channel
   You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations Carousel component to the page where you want the recommendation to appear. Use the property editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.
4. Click **New**.
5. Complete the following fields:
   - `Name`—Enter a name for the recommendation. This name doesn't appear in the community.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.

     The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a `{!userId}` context variable in your URL, `https://www.example.com/doSurvey?userId={!userId}`. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

     Recommendations support these context variables.

Context Variable	Description
`{!actionLinkId}`	The ID of the recommendation link that the user clicked.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:
- Manage Communities

  OR

  Create and Set Up Communities

Context Variable	Description
`{!actionLinkGroupId}`	The ID of the recommendation link group containing the recommendation that the user clicked.
`{!communityId}`	The ID of the community in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, `"000000000000000000"`.
`{!orgId}`	The ID of the org in which the user clicked the recommendation.
`{!userId}`	The ID of the user that clicked the recommendation.

- `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.

  Tip: To create an audience that appears in this drop-down list, in Community Workspaces, select **Content Management** > **Recommendations** > **Audiences**. In Community Management, select **Recommendations** > **Audiences**. Click **New**.

- `Enabled`—If checked, this recommendation is active and appears in communities.

  The Recommendations Carousel displays your custom recommendations and also displays system-generated topic recommendations for your community.

  After a community member clicks or dismisses a recommendation, it no longer appears for that member.

6. Click **Save**.

Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

IN THIS SECTION:

Create Targeted Audiences for Your Community Recommendations
Create audiences of new community members or use the API to manage customized lists of audience members to organize and target recommendations.

SEE ALSO:

Update Your Community's Template

Create Targeted Audiences for Your Community Recommendations

Create audiences of new community members or use the API to manage customized lists of audience members to organize and target recommendations.

1. Open Community Workspaces or Community Management.
2. Open Recommendation Audiences.
   - In Community Workspaces, select **Content Management** > **Recommendations** > **Audiences**.
   - In Community Management, select **Recommendations** > **Audiences**.
3. Click **New**.
4. Complete the following fields.
   - `Name`—Enter a name for the audience.
   - `Audience Type`
     - Select **New Members** to create an audience based on how long users have been community members.

       Enter the number of days since registration for audience members.
     - Select **Custom List** to create an audience based on any criteria you want.

       Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.
5. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

Tip: To remove an audience, click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All community members).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces or Community Management:

- Manage Communities

  OR

  Create and Set Up Communities

SEE ALSO:

Chatter REST API Developer Guide

Apex Developer Guide

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your community.

IN THIS SECTION:

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

We provided some default badges but you can create your own. You can also choose who else can create badges and who can give badges in your community.

IN THIS SECTION:

Recognition Badges Limitations

While Recognition Badges are a great way to keep your members involved in your community, keep a few things in mind when you use them.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your community and restrict who can create and give badges.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your community. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

Turn On Recognition Badges in Community Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your community. You can edit both the default badges and your custom badges.

Manage Who Can Give a Specific Recognition Badge

Controlling who can give a recognition badge helps make sure that the right badges are awarded to the right members. For example, you can set it up so that only community managers can award MVP and VIP badges.

Give Recognition Badges to Community Members

Giving badges to members helps reward them for staying engaged in the community.

Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to community members.

SEE ALSO:

Salesforce Communities Recognition Badges Implementation Guide

Recognition Badges Limitations

While Recognition Badges are a great way to keep your members involved in your community, keep a few things in mind when you use them.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

- Chatter must be enabled for your community.
- Community members with the following user licenses can see the badges that they have received, but not give badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User
  - Standard Partner
- Badges aren't translated. The badge name and description are the same regardless of which language the member is using.
- "Review" moderation rules are not enforced for badges comments. To help prevent blacklisted keywords from appearing in your community, add your list of words to "block" or "replace" rules.
- Past activity, such as comments or likes, isn't counted when you create a mission.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your community and restrict who can create and give badges.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

IN THIS SECTION:

Enable Work.com Thanks
Recognition Badges are based on the Work.com Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

Configure Who Can Create Recognition Badges
Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Configure Who Can Give Recognition Badges
Use permission sets, our recommended method, to choose which members can give recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Use Components to Display Recognition Badges on Member Profiles
Use the User Profile component or the Recognition Badge component to display Recognition Badges on a member's profile.

Display the Full List of Recognition Badges on a Member's Profile Page
Edit the user profile layout to display the full list of recognition badges on a members' profile page.

Enable Work.com Thanks

Recognition Badges are based on the Work.com Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

Note: You don't need an additional work.com license to set up the Thanks feature.

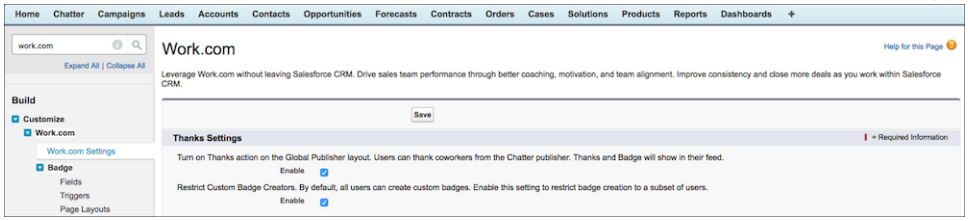
1. In Classic, from Setup, enter `Work.com` in the **Quick Find** box.
2. Select **Work.com Settings.**
3. Under **Thanks Setting**, select **Enable** and save. The Restrict Custom Badge Creators option is now available.
4. Under Restrict Custom Badge Creators, select **Enable**, and save.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To set up the Thanks feature:
- Customize Application



Configure Who Can Create Recognition Badges

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Say that you create a recognition badge to be given to MVPs. Restricting who can create badges helps eliminate the risk of having multiple MVP badges. Restricting who can give the badge to, say, community managers helps make sure only those members who are truly MVPs receive recognition for it.

1. First, set up the permission set for creating badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Create Custom Badge Definitions."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for creating a badge, select **Create custom Badge Definitions** permission.
6. Select **Manage Assignments** and add those users you want to let create badges.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

Configure Who Can Give Recognition Badges

Use permission sets, our recommended method, to choose which members can give recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Note: Buttons for giving badges appear in two places on the member's profile. If, after following the steps below, your approved users don't see the Give button at the top of a member's profile, under Settings, go to Users. Edit the User Page Layout and add the Give Badge action in the Salesforce Mobile and Lightning Experience Actions section.

1. First, set up the permission set for giving badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Give Recognition Badges in Lightning Communities."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for giving a badge, select **Give Recognition Badges in Lightning Communities** permission.
6. Select **Manage Assignments** and add those users you want to let give badges.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

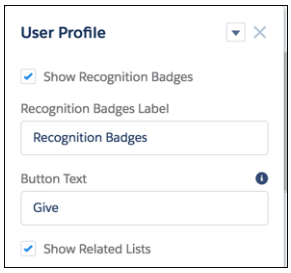
To assign permission sets:
- "Assign Permission Sets"

Use Components to Display Recognition Badges on Member Profiles

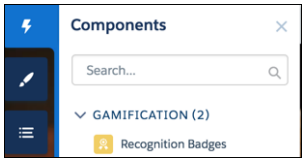
Use the User Profile component or the Recognition Badge component to display Recognition Badges on a member's profile.

You can either use the User Profile component or the Recognition Badges component to allow assigned badges to display on a member's profile page.

1. In the User Profile component, select **Show Recognition Badges**.



2. Alternatively, drag the Recognition Badges component onto the profile page.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

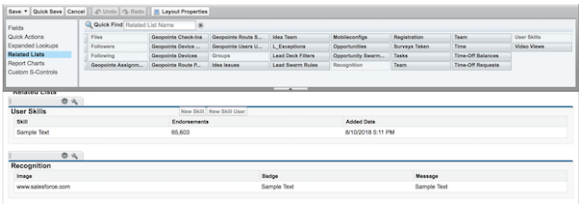
USER PERMISSIONS

To manage page components:
- Create And Set Up Communities

Display the Full List of Recognition Badges on a Member's Profile Page

Edit the user profile layout to display the full list of recognition badges on a members' profile page.

1. From Setup, go to **Users** under **Customize**. Select **Page Layouts**.
2. Click **Edit** next to User Profile Layout.
3. Click **Related Lists** and drag **Recognition** to the Related Lists section of the page layout and save.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To update the user profile layout:

- Customize Application

4. Each community's guest users have a discrete user profile. To find out which user profile layout to update, go to Community Builder, of the community you're working on, open Settings, and then click the link to the guest user profile. Repeat steps 1–3 for that user profile layout.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your community. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

Community managers create missions and choose the badge, the action, and the threshold. For example, a mission could assign the Nice Work badge when a member answers 10 questions. Actions you can choose from include writing a post or comment, receiving a like, and more.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

IN THIS SECTION:

Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Display Unearned Badges

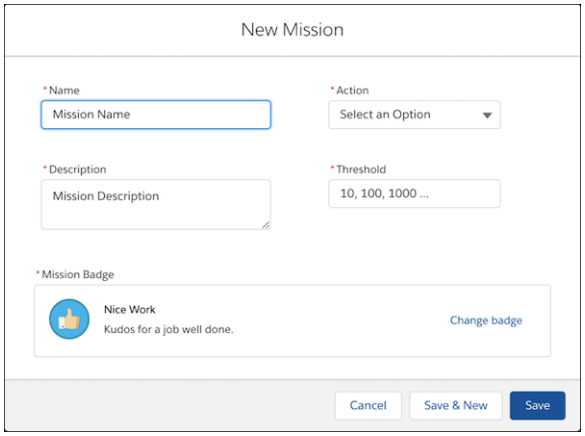
Inspire members to participate more in your community by showing them which badges they can earn. You can display the unearned badges in the member's recognition badges list.

Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Note: To use Missions, set up Recognition Badges.

1. In Community Workspaces, click the Gamification tile and go to the Missions section.
2. Click **New**.
3. In the New Mission popup window, give the mission a name and a description.



4. Select the action that the member performs.
5. Enter the threshold, which sets how often a member must repeat the action to earn the badge.
6. Choose your preferred badge and save your changes.

   Tip: To make a badge available for missions, in the Recognition Badges section, create or edit a badge and select **Mission Badge**.

   As a best practice, use the badge's name and description to explain how the user can earn it.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:
- Create Custom Badge Definitions

To manage your recognition badges:
- Create And Set Up Communities

  AND

  Moderate Chatter

  OR

  Manage Communities

  AND

  Moderate Chatter

To manage badges created by someone else:
- Modify All Data

  AND

  Moderate Chatter

Display Unearned Badges

Inspire members to participate more in your community by showing them which badges they can earn. You can display the unearned badges in the member's recognition badges list.

User Permissions Needed	
To edit page components:	Create and Set Up Communities AND View Setup and Configuration

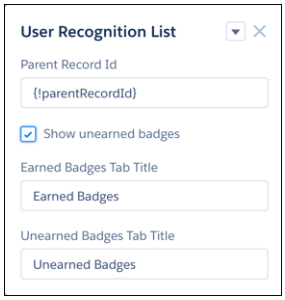
Note: To use Missions, set up Recognition Badges.

1. In Community Builder, open the Badge Received Related List page.
2. Click the User Recognition List component.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

3. Select **Show unearned badges**.

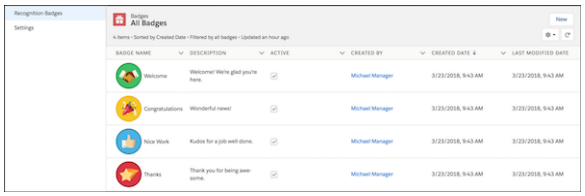


Turn On Recognition Badges in Community Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Before you can complete this task, you enable Work.com's Thanks feature, configure permission sets for who can create and give badges, and add recognition to user profile layouts.

1. In Community Workspaces, click the Gamification tile.
2. In **Settings**, turn on Recognition Badges. A Recognition Badges section appears above **Settings**.
3. To see the available badges and create and manage badges, click **Recognition Badges**.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To turn on or off Recognition Badges:

- Create and Set Up Communities

  AND

  Moderate Chatter

Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your community. You can edit both the default badges and your custom badges.

1. To create a badge, in Community Workspaces, click the Gamification tile and go to the Recognition Badges section.
2. Click **New**.
3. Give your badge a name and a description and upload an image. Click **Save**. The **Public** and **Active** checkboxes are selected by default. When you save, your badge is immediately available to everyone with permissions to give a badge. If you want to limit who can give a badge, deselect

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Communities

  AND

  Moderate Chatter

  OR

  Manage Communities

  AND

  Moderate Chatter

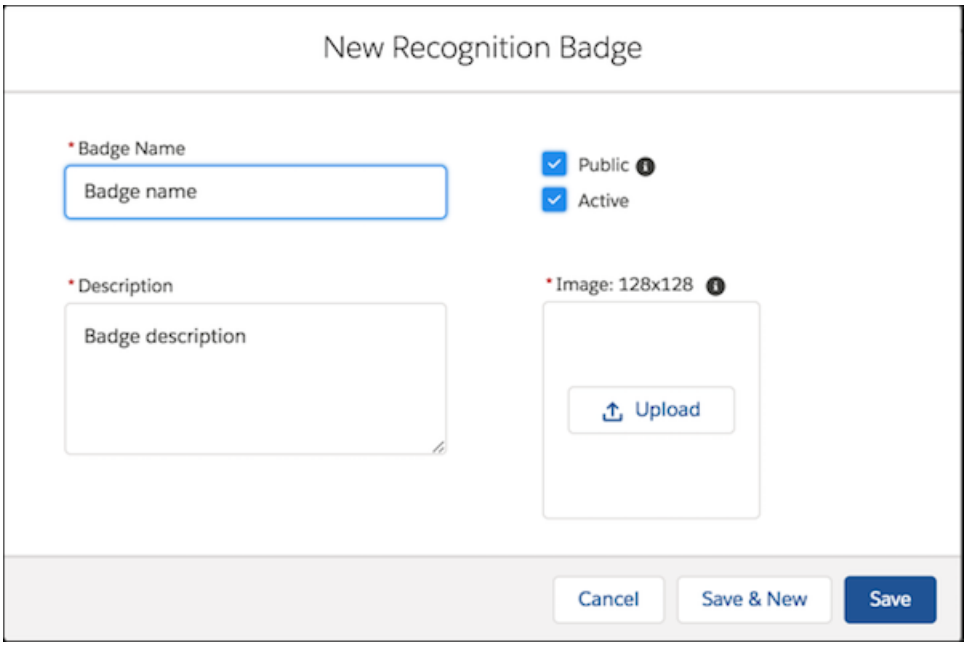
To manage badges created by someone else:

- Modify All Data

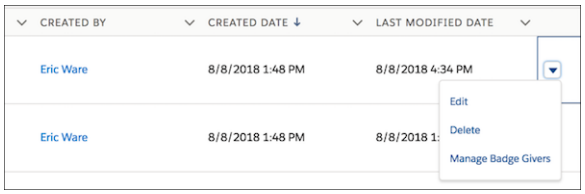
  AND

  Moderate Chatter

Public. If you aren't ready for it to be live, deselect **Active**. If you want the badge to be available for a mission, select **Mission Badge**.



4. To edit the fields, go to the badge related list, click the dropdown and the end of the badge's row, and click **Edit**.



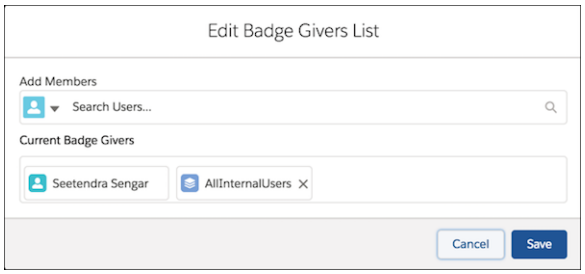
5. To delete a badge, go to the badge related list, click the dropdown and the end of the badge's row, and click **Delete**.

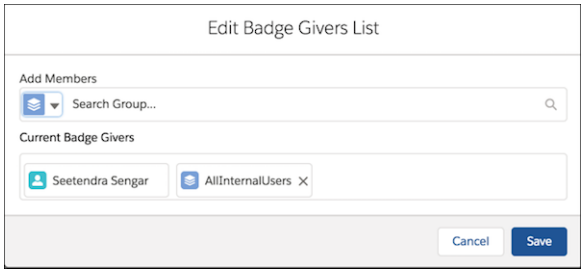
Manage Who Can Give a Specific Recognition Badge

Controlling who can give a recognition badge helps make sure that the right badges are awarded to the right members. For example, you can set it up so that only community managers can award MVP and VIP badges.

By default, recognition badges are available to everyone with permission to give badges. To be able to select specific givers, make sure to deselect **Public** when you create or edit the badge.

1. In Community Workspaces, click the Gamification tile.
2. Click the dropdown and the end of the badge's row, and click **Manage Badge Givers**.
3. In the popup window, search to add the users or public groups you want to have permission to give badges. Only those users with the Give Recognition Badges in Lightning Communities permission are available. You can remove members from the list by clicking the X by their name. Click **Save**.





EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:
- Create Custom Badge Definitions

To manage your recognition badges:
- Create And Set Up Communities

  AND

  Moderate Chatter

  OR

  Manage Communities

  AND

  Moderate Chatter

To manage badges created by someone else:
- Modify All Data

  AND

  Moderate Chatter

Give Recognition Badges to Community Members

Giving badges to members helps reward them for staying engaged in the community.

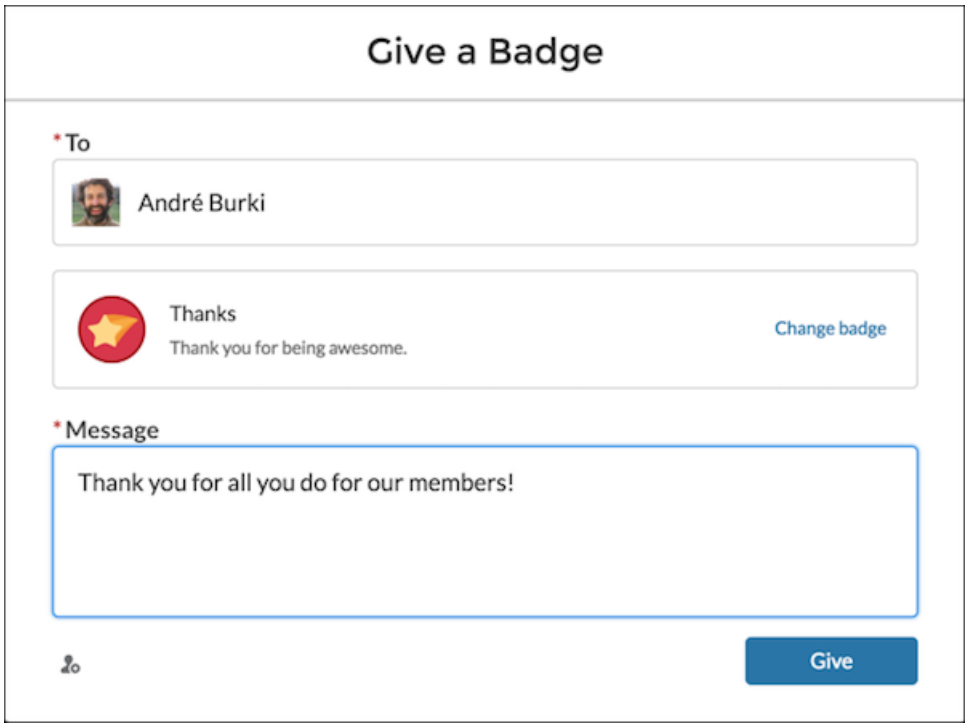
1. Open the member's profile page.
2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.
3. Choose which badge you want to give by clicking **Change badge**.
4. Add a message letting the member know why they are getting the badge, and click **Give**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

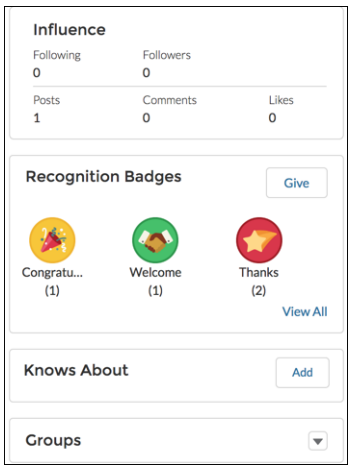
To give recognition badges:
- Give Recognition Badges in Lightning Communities



Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

1. Open the profile page for the member who got the badge by mistake.
2. To open the Recognition Badge list view, click **View All** under Recognition.



3. Locate the badge in the list and click the dropdown at the end of the row.
4. Click **Delete**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To manage your recognition badges:

- Create And Set Up Communities

  AND

  Moderate Chatter

  OR

  Manage Communities

  AND

  Moderate Chatter

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to community members.

Assign a Recognition Badge and Notify a Member Using Apex

```
ID networkID = '0DBB0000000CdBaOAK';
ID badgeDefintionID = '0W1B0000000ekuJKAQ';
ID giverID = '005B0000003InDeIAK';
ID recipientID = '005B000000483dDIAQ';
String message = 'Welcome to the community';

WorkThanks thanks = new WorkThanks (
NetworkdID=networkID
GiverID=giverID,
Message=message
);
insert thanks;

WorkBadge badge = new WorkBadge(
DefinitionId=badgeDefinitionId,
NetworkID=networkID
RecipientId=recipientID,
SourceId=thanks.id
);
insert badge;

// optional: create a Chatter post on the user profile
// showing the badge. The user will be notified through
// the standard Chatter notification mechanisms.
FeedItem feedItem = new FeedItem(
NetworkScope=networkID,
ParentId=recipientID,
RelatedRecordId=thanks.id,
Body=message,
Type='RypplePost',
Visibility='AllUsers'
);
insert feedItem;

// Unfortunately, there is a limitation in the work.com API that
// prevents these 2 lines from working:
// thanks.FeedItemID = :feedItem.id;
// update thanks;
```

Assign a Recognition Badge When a Member Reaches a Number of Reputation Points

To avoid assigning the same badge twice, we've added a custom "hasBadge_c" field on the user object.

```
trigger NetworkMemberTrigger on NetworkMember (after update) {
              for (NetworkMember nm : Trigger.New) {
                   User user = [select ID, hasBadge_c from User where ID =
:nm. MemberID];
         If (nm.ReputationPonts >= 40 && !user.hasBadge_c) {
             WorkThanks thanks = new WorkThanks(
             GiverId='005B00000036ukY',
             Message='inserted by trigger',
             NetworkId=nm.NetworkId);
             insert thanks;

            WorkBadge badge = new WorkBadge(
            DefinitionId='0W1B0000000T1QBKA0',
            NetworkId=nm.NetworkId,
            RecipientId=nm.MemberId,
            SourceId=thanks.id);
            insert badge;

            user.hasBadge_c = true;
            update user;
      }
   }
}
```

Automatically Add Reputation Points When Badge Is Assigned to a Member

To avoid hardcoding the number of reputation points that are assigned with the badge, this example assumes that the WorkBadgeDefinition entity has been customized with an additional "ReputationPoints__c" field.

```
trigger WorkBadgeTrigger on WorkBadge (after insert) {
             for (WorkBadge badge : Trigger.new) {
                 if (badge.DefinitionId == '0W1B0000000T1QBKA0') {
                     WorkBadgeDefinition badgeDefinition = [select Id,
ReputationPoints_c from WorkBadgeDefinition where Id =
:badge.DefinitionId];
            NetworkMember member = [select Id, ReputationPoints from
NetworkMember where MemberID = :badge.RecipientId];
            member.ReputationPoints = member.ReputationPoints +
badgeDefinition.ReputationPoints_c;
            update member;
      }
   }
}
```

Assign Recognition Badge When Member Creates Number of Posts or Comments

The ChatterActivity object contains the following useful fields:

- CommentCount
- CommentRecievedCount

- LikeReceivedCount
- PostCount

These counters can be used to programmatically assign badges based on various thresholds. For example, members could get a badge whenever they create 100 posts or whenever they received 100 likes.

```
trigger ChatterActivityTrigger on ChatterActivity (after update) {
               for (ChatterActivity ca : Trigger.New) {
                   if (ca.PostCount >= 10) {
                       // TODO: assign badge to user if he hasn't received one already
      }
   }
}
```

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other community members so that they know how influential you are. When you start out in the community, you are at the lowest level. As you become more active in the community, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level. You increase your reputation by:

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Enable Reputation in Your Community
Enable reputation in your community so that members are recognized and rewarded for participating.

Set Up Reputation Levels
Update the default reputation levels to meet your community's needs and help motivate your members.

Set Up Reputation Points
Set up a point system to reward users for participating in the community.

How is my community reputation calculated?
The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit Communities settings:

- Create and Set Up Communities

  AND

  Is a member of the community whose Community Management page they're trying to access.

Action	Points
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation section doesn't appear in Community Management. To show the Reputation section, go to **Administration** > **Preferences** and select **Show all settings in Community Management**.

SEE ALSO:

- Set Up Reputation Levels
- Set Up Reputation Points
- How is my community reputation calculated?

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

Note: A community must have at least three reputation levels and can have up to 50.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access Reputation by clicking **Administration** > **Reputation Levels**. If you're using Community Management, access Reputation by clicking **Reputation** > **Reputation Levels**.

   From here you can:

   - Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.

     Note: You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

   - Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
   - Edit the point range for a level.

     When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

   - Add more levels by clicking **Add a level**, located underneath the list of levels.
   - Remove a level by clicking ⊗ next to the level.
3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your community.

SEE ALSO:

Set Up Reputation Points

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation levels:

- Manage Communities

  AND

  Is a member of the community

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation points:

- Manage Communities

  AND

  Is a member of the community

Note: In organizations with reputation enabled before the Winter '15 release, actions associated with questions and answers are available at the time of the release. Their default point values are set to 0. Existing user reputation points are not affected by the release, and users don't accrue points from these actions until you configure point values for them.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access Reputation by clicking **Administration** > **Reputation Points**. If you're using Community Management, access Reputation by clicking **Reputation** > **Reputation Points**.
3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to *0*.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.

Tip: You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Set Up Reputation Levels

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5

Action	Points
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

SEE ALSO:

Enable Reputation in Your Community

Community Reporting

Use community reporting to see short-term and long-term trends in various areas of your community. The preconfigured AppExchange package makes reporting a snap for community managers. You can also give the power of reporting to your community members.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Report on Communities with the AppExchange Packages for Community Management

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management or Community Workspaces.

Service Community Scorecard

Track member use, service metrics, and search activity using the Service Community Scorecard.

Set Up Report Management for External Users—Create and Edit Reports

Community partner and customer users can create and edit reports in their own personal folder or in a privately shared folder if they have sufficient permissions. You can grant partner and customer users permissions to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

Track Community Activity with Custom Reports

Create custom reports to track usage, moderation, and other community activity.

Communities Report and Dashboard Considerations

If the Reports and Dashboards tabs are exposed in the community, external users can access reports and dashboards.

Allow External Users to Report on Tasks and Events

Take the following steps to give access to your portal and community users to report on tasks and events.

Google Analytics™ for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within a community.

Report on Communities with the AppExchange Packages for Community Management

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management or Community Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Take immediate action on recent activity with Insights reports

Note: To use the preconfigured Insights reports, your community must use Chatter.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages

During installation, dashboard and report folders are automatically installed in your internal org. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management or Community Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management or Community Workspaces, community-specific data is displayed.

IN THIS SECTION:

What's New?

For Winter '19, we added a report that tracks your community's content delivery network (CDN) usage. When activated, the Community Cloud CDN can improve the page load times of your community. However, the Community Cloud CDN has an annual usage limit, so this report helps ensure that your org remains within that limit. We also added a report that lets you see what questions have best answers (and which don't) in your community. This data can help you see where your members are engaging most and where you might need to boost your engagement efforts.

Install the Package

Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

Upgrade Considerations

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

Install the Upgrade

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

Post-Upgrade Checklist

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

Insights Vs. Dashboards—What's the Difference

Use Insight reports to view, monitor, and act on your community's activity. These reports give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

Service Community Scorecard

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we announced the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

Community Management Insights

The Salesforce Communities Management package provides a set of reports that let you monitor recent activity and drill down to the source to take further action.

Community Management Dashboards Descriptions

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

Custom Report Type Descriptions

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.

The Power of Customization

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

Community Case Deflection Metrics Dashboard and Reports

Install the Salesforce Case Deflection Reporting Package to see how well the Contact Support Form and Case Deflection components actually deflect cases from being created. Using the Community Case Deflection Metrics dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.

Unsupported Components

The following list identifies which reports are not supported in this release. If you are installing the package for the first time or are installing the package from scratch, you don't need to worry about these as they will not show up. If you are updating, be sure to remove these components.

SEE ALSO:

Enable and Map Engagement Insights for Community Managers

Enable and Map Dashboards for Community Managers

What's the difference between Engagement Insights and dashboards?

What's New?

For Winter '19, we added a report that tracks your community's content delivery network (CDN) usage. When activated, the Community Cloud CDN can improve the page load times of your community. However, the Community Cloud CDN has an annual usage limit, so this report helps ensure that your org remains within that limit. We also added a report that lets you see what questions have best answers (and which don't) in your community. This data can help you see where your members are engaging most and where you might need to boost your engagement efforts.

EDITIONS

Available in: Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tip: The ✦ symbol identifies all the new components in this release.

Report Abbreviations

You may notice one or two letters or symbols at the front of some report names. They are a bit of shorthand to help keep the report names at a reasonable length. Here's a quick rundown of what they mean.

- # - Number of Records
- A - Activity
- C - Content
- CH - Chatter
- CH D - Chatter Activity by Department
- G - Groups
- L - Logins
- L - CC - Logins for Customer Community License
- L - CP - Logins for Customer Community Plus License
- L - PC - Logins for Partner Community License
- M - Members
- MO - Moderation
- O - Overview
- Q - Questions
- R - Recommendations
- S - Self-Service Community
- T - Topics

Enable Community Workspaces

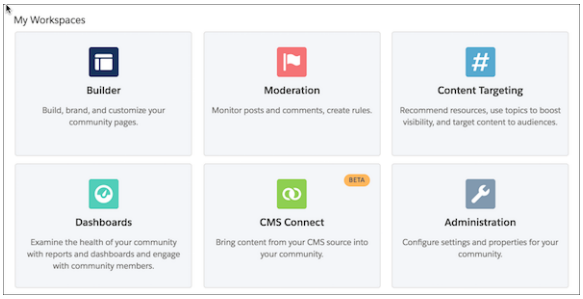
Community Workspaces is our fantastic new community management interface, and the replacement for the old Community Management Console. Eventually all the orgs will move to Community Workspaces, so now is a great time to explore all the new management tools not found on the Community Management Console. To enable Community Workspaces, in Setup, enter **Communities** in the Quick Find box and click **Communities Settings**. Under Community Management Settings, select **Enable Community Workspaces**. Community Workspaces are enabled by default in all orgs created after Spring '17.

Note: Internet Explorer® version 11 does not support Community Workspaces.

What's Different Between Community Workspaces and Community Management?

Community Workspaces offers a streamlined area to access all the tools that you need for building, managing, and tracking your community. Even though it looks different, everything you use is still there. Some things have been moved around a bit.

- Engagement reports have been moved into the Dashboard workspace. Reporting dashboards and your Home dashboards are also located in the Dashboard workspace.



- Moderation pages have been organized into separate areas within the Moderation workspace. You can access moderation Insights from the Home tab and create and customize moderation rules, member criteria, and content criteria from the Rules tab.
- Want to jump to another workspace from the workspace you are in? It's easy! Click the icon in the upper-left corner and a navigation dropdown menu appears. You can also switch between communities without leaving Community Workspaces.

Note: We encourage you to switch to Community Workspaces, as no further enhancements are coming to the Community Management Console.

IN THIS SECTION:

Salesforce Community Management Package with Chatter

The Community Management package delivers the insights, dashboards, reports, and moderation controls community managers need, to drive adoption, monitor engagement, and build a vibrant community.

Salesforce Community Management Package Without Chatter

The Community Management package delivers the dashboards and reports community managers use, to drive adoption, monitor engagement, and build a vibrant community.

Salesforce Community Management Package with Chatter

The Community Management package delivers the insights, dashboards, reports, and moderation controls community managers need, to drive adoption, monitor engagement, and build a vibrant community.

In this addition to version 12.0, we added two reports:

- Community CDN Usage Report
- Questions With and Without Best Answers

Unsupported old reports and dashboards—if you're upgrading, remove these components manually.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce Community Management Package Without Chatter

The Community Management package delivers the dashboards and reports community managers use, to drive adoption, monitor engagement, and build a vibrant community.

In this addition to version 9.0, we added one report.

- Community CDN Usage Report

Unsupported Components—if you're upgrading, remove these components manually

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Install the Package

Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

If you're upgrading from a previous version of this package, review the Upgrade Considerations and then follow the steps in Install the Upgrade. Be sure to check the unsupported components list and delete them from your organization.

Note: To install the version of the package for Communities with Chatter, Chatter must be enabled. There are no prerequisites to install the version of the package for communities without Chatter.

1. Select **AppExchange** from the Lightning Platform Apps drop-down list. You can also click here.
2. Search the AppExchange site for Salesforce Communities Management (for Communities with Chatter) or Salesforce Communities Management (for Communities without Chatter).
3. Click **Get It Now** on the application information page. If prompted, log in to the AppExchange.
4. Click **Install in Production**.
5. Review the terms and conditions, select **I have read and agreed to the terms and conditions**, then click **Confirm and Install**.
6. Click **Install for Specific Profiles** to grant access to the users working with the reports and dashboards.
7. Review the list of API access that the package components have been granted access to, then click **Next**.
8. Click **Install**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

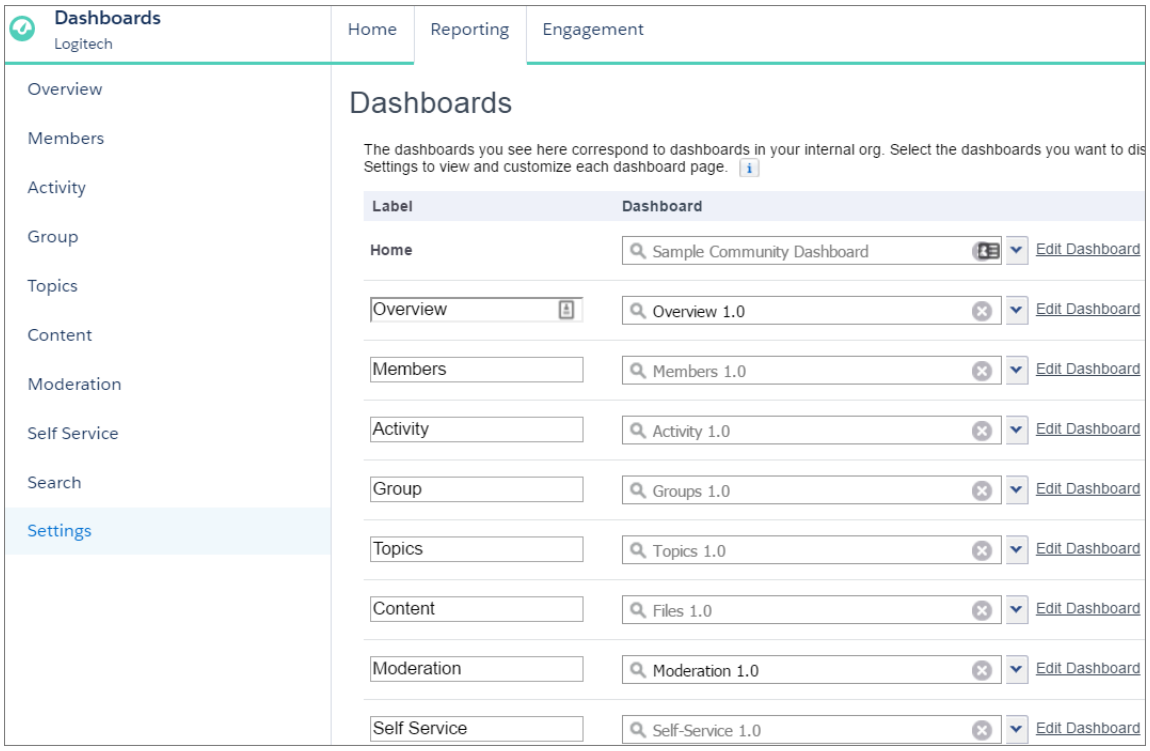
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install packages:

- Download AppExchange Packages

Example: Report folder mapping in the Dashboard workspace of Community Workspaces.



If this is your first time installing the package, or you don't have any current mappings for your Community Management or Community Workspaces, the package automatically maps the Insights report folders and dashboards for you.

Note: If you have an earlier version of the package installed, you may want to uninstall it before reinstalling the new version. However, if you've customized any of your reports, you can upgrade the package without uninstalling your current version. Click here for more information about what to consider when upgrading.

The Installed Package Detail page confirms when installation is complete. In your Salesforce org, look in the Reports tab for the following folders.

Folder Name	Description	Package with Chatter	Package without Chatter
Communities Dashboards	Provides the License Usage 1.0 dashboard.	✓	✓
Lightning Communities Dashboards	Includes dashboards that map to **Dashboards** in Community Management and Community Workspaces, including your home page. **Note:** Installing the package doesn't auto-map a dashboard for your home page, you must map one yourself.	✓	

Folder Name	Description	Package with Chatter	Package without Chatter
Communities Reports	Provides the reports used in your Community Management dashboards. These reports are used in the dashboards in **Dashboards** > **Reporting** if you are using Community Workspaces.	✅	✅
Community Management Home Reports	Provides the reports used in your Community Management home dashboard.	✅	✅
Insights Adoption 2.0 Insights Activity 2.0 Insights Files 2.0 Insights Groups 2.0 Insights Self-Service 2.0 Insights Topics 2.0 Members Engagement	Each folder includes reports for the mapped **Insights** pages in **Community Management** > **Engagement** or in **Dashboards** > **Engagement** if you are using Community Workspaces.	✅	
Moderation Audit Trail Moderation Flagged Moderation Pending Moderation Users	Each folder includes reports for the mapped **Insights** pages in **Community Management** > **Moderation** or in **Moderation** > **Moderate** if you are using Community Workspaces.	✅	
Flagged Files	Provides the Flagged Files Report.	✅	
Flagged Messages	Provides the Flagged Direct Message Report and Flagged Private Message Report.	✅	
Misc Communities Reports	Provides reports that are feature-dependent, such as reports that require Chatter messages, direct messages, or the community case feed.	✅	
Chatter Dashboards	Provides reports and dashboards to track Chatter usage in your internal Salesforce org. Note: These folders don't map to anything in Community Management or Community Workspaces	✅	
Chatter Reports		✅	

Note: If you are installing the package for Communities without Chatter, you also still have a Community Management Home Dashboards folder.

Upgrade Considerations

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

If you choose to just go ahead and upgrade, don't worry--during the upgrade, your customizations are preserved. We don't overwrite anything you've tweaked. However, we can't port over your customizations to any new versions of reports or dashboards that we happen to be installing. That's ok. The old, customized versions will keep working just fine.

But, if we update existing reports or dashboards, we do recommend that you recreate any customizations you've made and then delete the older component versions

Note: Versioning is handled at the component level: dashboards, reports, and custom report types. If a component is updated, its version is updated. For a list of new components, see What's New?. Because of the way we map Insights reports in Community Management, we also version the Insights folders. If we make major changes to Engagement or Moderation, we provide an updated version of each Insights folder within that page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Install the Upgrade

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

Upgrading doesn't overwrite the original custom report types, dashboards, or reports.

Important: Customizations are not ported to the new package. If we updated components that you've customized, you must recreate your customizations in the new component versions. Recreate your customizations before continuing to the next step.

1. Review the upgrade considerations.
2. Install the Package. Installing an upgrade is just like a clean install. After you install the package, click **Reports** in your internal Salesforce org to check out your new folders and components. Dashboard and report names are suffixed with version numbers so you can easily identify the new items.
3. Review What's New? to see if we updated any components that you've customized. You can also look for this symbol in the document to identify new components.
4. In Community Management or the Dashboard workspace, review and update your dashboard and Insights mappings. Click **Dashboards** > **Settings or Engagement** > **Settings**.

   We recommend that you verify your dashboard mappings are using the latest version of all the dashboards.
5. If applicable, delete any reports, dashboards, or custom report types that were updated or are now unsupported to avoid confusion and ensure your community managers always use the latest and greatest.

   For more information, see What's New? and Unsupported Components.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

Post-Upgrade Checklist

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

If you're upgrading to the Communities Management (for Communities with Chatter) package, complete these steps:

- ☐ Delete all the reports in the original Insights folders and also delete those original folders. Then in Community Management, update your mapping to use the Insights 2.0 folders. For example, you can delete the **Insights Adoption** folder and all of its contents, but keep the **Insights Adoption 2.0** folder. Keep in mind that if you made any customizations to the Insights reports, they don't port over to the updated versions, and you'll lose those customizations if you delete those reports.
- ☐ Make sure the License Usage 1.0 dashboard is **not** mapped in Community Management. View this dashboard only in your internal Salesforce org, not in Community Management.
- ☐ If you still see version numbers on your Communities Dashboards and Communities Reports folders, remove them from the folder names and merge all the reports into one folder. Your reports and dashboards aren't affected by renaming the folders. Review the list of report and dashboard folders that should be included in your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Insights Vs. Dashboards—What's the Difference

Use Insight reports to view, monitor, and act on your community's activity. These reports give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

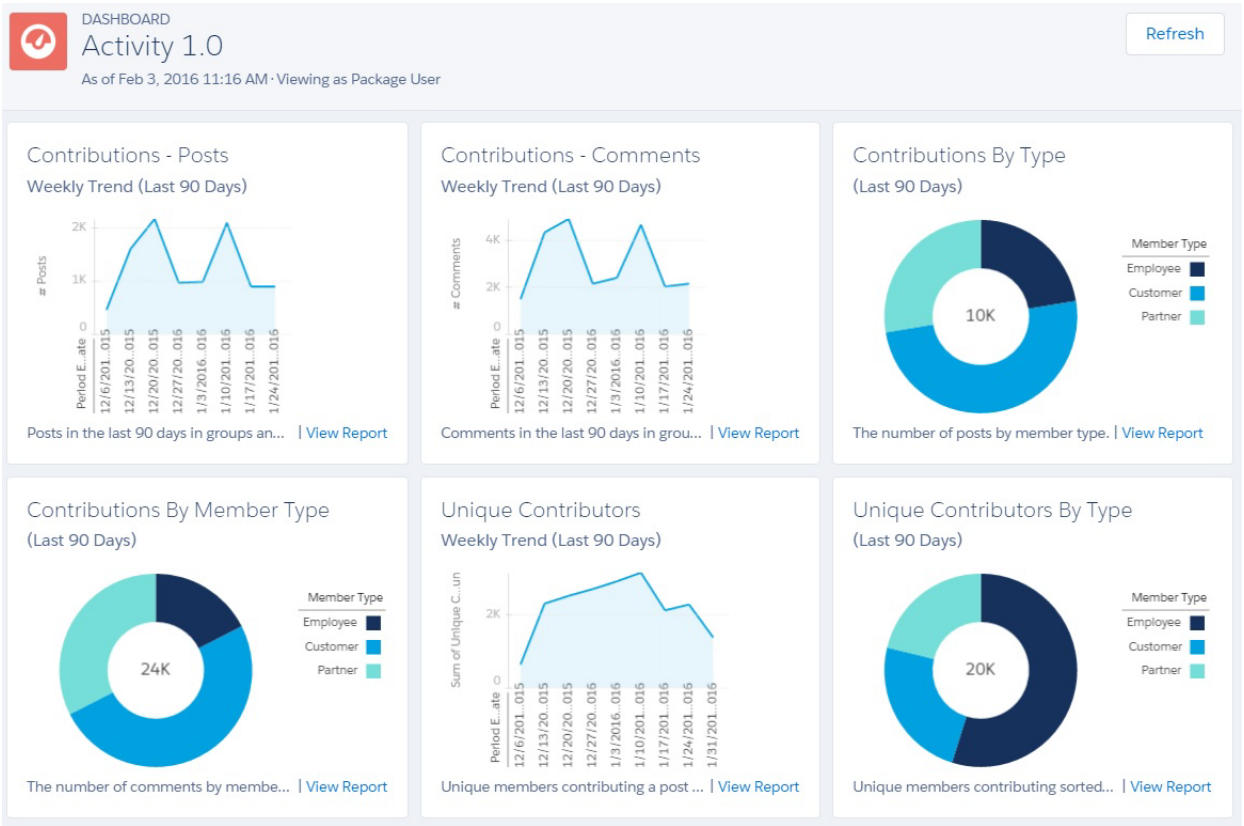
Use Dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).

You can visit the**Dashboards tile** > **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Service Community Scorecard

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we announced the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

How do you get the Service Community Scorecard? If you are installing this package for the first time, it automatically maps to your dashboards home tab. If you are updating to this package, you have to map manually.

Got it? Great! We prepopulated the scorecard to get you up and running. However, you can always customize it to best fit your community. More info on that part in a bit. Here's what you start out with:

- **Membership**: Three reports, broken down into contributors and observers. Make sure that Reputation is on to get the most out of the Top 10 Members by Reputation report.
  - Total Members
  - Daily Active Users
  - Top 10 Members by Reputation
- **Information Discovery**: Two reports that show what users are not finding in the community. A great report to add next to these new reports is "Most Viewed Articles", but it's part of a different AppExchange package. See https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003HXO9EAO for details.
  - Top Unanswered Questions
  - Searches with No Results (30 Days)

- **New Members**: Three reports that tell you how many new members have joined your community and whether they have profile photos, a strong sign of their engagement.
  - New Members (7 Days)
  - New Members with Profile Pic
  - New Members (90 Days)
- **Cases**: Three reports all about customer cases. These reports include all cases in your org, not just those cases created through the community. We recommend marking cases created in the community so you can filter to just those particular cases.
  - Cases Opened
  - Case Resolution Time
  - Oldest Open Cases
- **Topics and Questions**: Two reports that let you keep tabs on hot topics and open questions vs. questions that have been marked with a best answer.
  - Topics Most Talked About 3.0
  - Questions vs. Best Answers

Ready to customize the Service Community Scorecard or use it to create your own scorecard? Go to your internal org and click the Dashboard tab. Search for "Service Community Scorecard" and click **Edit** to add or remove reports or change the name of your scorecard.

SEE ALSO:

Enable and Map Dashboards for Community Managers

Community Management Insights

The Salesforce Communities Management package provides a set of reports that let you monitor recent activity and drill down to the source to take further action.

Important: Insights are only available in the Communities Management AppExchange package with Chatter.

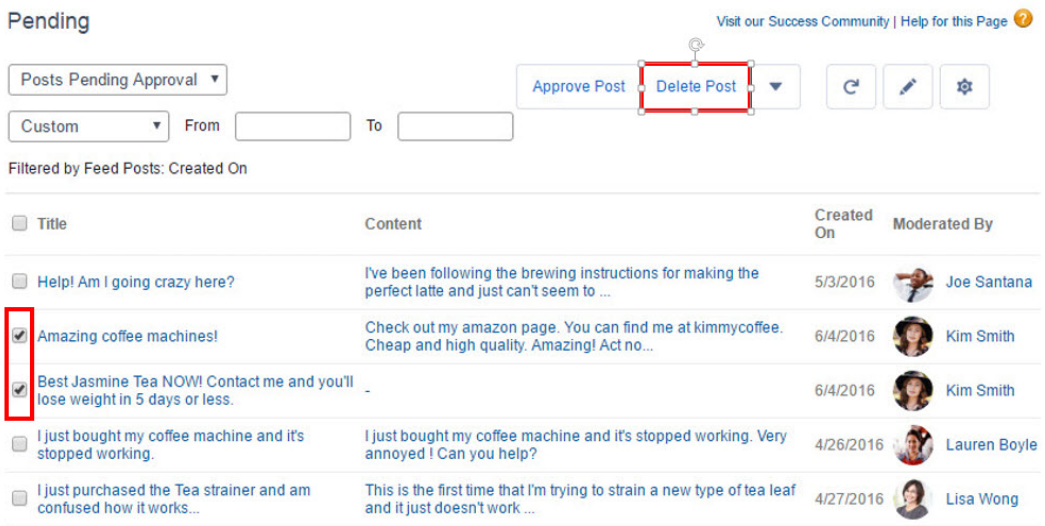
When you view Insights in Community Management or Community Workspaces, reports automatically display data specific to the community you're managing. Insights reports are arranged into two sections in the Dashboards workspace, Engagement and Moderation.

Actionable Insights are available in all orgs with Communities. All you need is a report to use them with. Each Insights report has different actions. Insights report, click to edit the actions assigned to the report. You can find more information about viewing, customizing and configuring Insights and actions in the Salesforce help.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

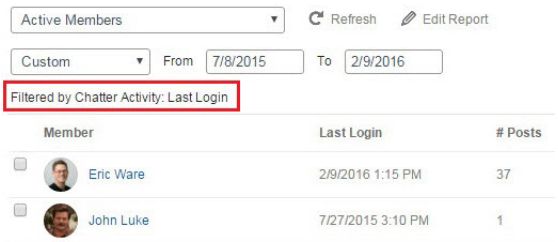
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Tip: Insights let you know how the report is filtered.

You can edit this label to be more descriptive.

1. Use the tables in this document to identify the custom report type for your Insights report.
2. In your internal Salesforce org, from Setup enter *Report Types* in the Quick Find box, and then select **Report Types**.
3. Click the name of the custom report type you want to edit, then click **Edit Layout**.
4. To change a label, select the field you want to update and click **Edit Properties** and then save your work.
5. Verify your changes in Community Management or Community Workspaces.



You can learn more about editing field layouts in the Salesforce Help.

IN THIS SECTION:

Adoption Insights

Use the Adoption Insights page to monitor member activity.

Activity Insights

Use the Activity Insights page to track posts and comments in groups.

Files Insights

Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

Groups Insights
Use the Groups Insights page to help manage your groups.

Moderation Insights
Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

Self-Service Insights
Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

Topics Insights
Use the Topics Insights page to keep an eye on recent topics.

Adoption Insights

Use the Adoption Insights page to monitor member activity.

With Adoption Insights, you can:

- Identify and welcome your new members
- Drive adoption and engagement in your community
- Re-engage with your community's top contributors

Report Name	Description	Custom Report Type
Active Members	Members who logged in to your community in the last 7 days with Chatter activity, such as a post or like.	Network Member Activity 1.0
Active Members With No Picture	Members without a user profile picture who logged in to your community in the last 7 days.	Chatter Activity 1.0
Contributors Inactive For 7+ Days 2.0	Members with the most posts and comments who are now inactive. These members haven't logged in to the community in the last 7 days, but have logged in once during the last 30 days. This report includes only members with more than 5 posts or 5 comments. **Important:** Adjust the report filters to fit your community.	Network Member Activity 1.0
Influencers Inactive For 7+ Days 2.0	Members with the most likes and comments received who are now inactive. These members haven't posted in the last 7 days, but have logged in to the community in the last 30 days. This report includes only members with at least 5 likes or 5 received comments. **Important:** Adjust the report filters to fit your community.	Network Member Activity 1.0
Influencers With No Picture	Members with the most likes and comments received, who have no user profile picture. This report includes only members with at least 5 likes or 5 received comments. **Important:** Adjust the report filters to fit your community.	Chatter Activity 1.0

Report Name	Description	Custom Report Type
New Contributors With No Picture	Members without a user profile picture, who registered in the last 7 days and also posted or commented recently.	Chatter Activity 1.0
New Active Members	New members who registered in the last 7 days. For the package with Chatter. the report also includes Chatter activity, such as a post or like.	Network Member Activity 1.0
Recent Contributors 2.0	New members active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Contributors With No Picture	New members without a user profile picture, active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Logins Successful	External users with the most recent successful logins to the community during the last 7 days. This report only includes direct logins to the community. If a user logs into an org and then switches to a community, their login activity isn't included.	Network Login History 5.0

Activity Insights

Use the Activity Insights page to track posts and comments in groups.

With Activity Insights, you can:

- Moderate recent discussions, including identifying posts with no comments
- Monitor your community's hot discussions
- Moderate group activity from new members

Report Name	Description	Custom Report Type
New Discussions 2.0	New group discussions created in the last 7 days, sorted by the newest post.	Network Groups Activity 3.0
New Members' Comments 2.0	Group comments created in the last 7 days by a member who registered in the last 30 days. This report is sorted by the highest number of likes.	Network Groups Activity 3.0
New Members' Posts 2.0	Group posts created in the last 7 days by a member who registered in the last 30 days.	Network Groups Activity 3.0
Recent Discussions	Group discussions created in the last 30 days.	Network Groups Activity 3.0

Files Insights

Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

Report Name	Description	Custom Report Type
Files With Activity	Files with comments, likes, or downloads.	File and Content Report

Report Name	Description	Custom Report Type
New Image Files 2.0	Image files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Office Files 3.0	Office files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Video Files 2.0	Video files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
Recent Files (All) 2.0	Files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report

Groups Insights

Use the Groups Insights page to help manage your groups.

With Groups Insights, you can:

- Moderate newly created groups
- Manage groups with deactivated or inactive owners
- Manage groups that will soon be archived

Report Name	Description	Custom Report Type
Best Answers From Groups 1.0	Best Answers created in last 7 days from Groups, sorted by the most recent answers.	Network Group Q&A Activity 1.0
Groups Recently Archived 2.0	Groups that were automatically archived in the last 15 days, sorted by the most recent contribution date. The report doesn't include groups manually archived by a user.	Network Group Membership 3.0
Groups Soon To Be Archived 2.0	Groups that are scheduled to be archived in the next 15 days, sorted by the soonest archive date.	Network Group Membership 3.0
Groups With Deactivated Owners 2.0	Groups with owners that are deactivated. These groups are active and haven't been archived.	Network Group Membership 3.0
Groups With Inactive Owners 2.0	Groups with owners who didn't log in to the community in the last 30 days. These groups are active and haven't been archived.	Network Group Membership 3.0
New Groups	Groups added in the last 7 days.	Network Group Membership 3.0
Questions From Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent.	Network Groups Q & A Activity 1.0
Questions With New Answers From Groups	Questions with answers created in last 7 days from groups, sorted by most recent answer.	Network Groups Q & A Activity 1.0
Questions Without Answers From Groups 1.0	Questions created in the last 7 days without answers from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0
Questions With Answers From New Groups 1.0	Questions created in the last 7 days with answers from new groups, sorted by most recent question.	Network Groups Q & A Activity 1.0

Report Name	Description	Custom Report Type
Questions From New Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0

Moderation Insights

Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

With Moderation Insights, you can:

- Monitor content blocked, flagged, or replaced by rules
- Monitor spammers or new members
- Monitor types of flagged messages including notes from customer
- Monitor private messages from new members (for details, see the Misc Communities Reports section)

Report Name	Description	Custom Report Type
Flagged Comments 3.0	Comments flagged in the last 7 days.	Network Moderation Flagged Comments 2.0
Flagged Files 3.0	Files flagged in the last 7 days.	Network Moderation Flagged Files 2.0
Flagged Private Messages 3.0	Chatter messages flagged in the last 7 days.	Network Moderation Flagged Messages 2.0
Flagged Direct Messages 2.0	Direct Messages flagged in the last 7 days.	Network Moderation Flagged Direct Messages 1.0
Flagged Posts 3.0	Posts flagged in the last 7 days.	Network Moderation Flagged Posts 2.0
Frozen Members 2.0	Members frozen in the last 7 days.	Network Frozen Members 2.0
Posts Pending Approval	Feed posts pending approval.	Network Posts Pending Approval 2.0
Moderation Audit 2.0	All moderation audits in the last 7 days. This includes flagging by users, moderation rules, and moderator actions.	Network Activity Audit 1.0

Self-Service Insights

Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

With Self-Service Insights, you can monitor and act on:

- Recently-created questions
- Questions and answers from new members to help drive adoption
- Questions escalated to cases (for details, see the Misc Communities Reports on page 680 section)

Note: This Insights page supports communities using the Customer Service template.

Report Name	Description	Custom Report Type
Best Answers 2.0	Questions with a best answer added in the last 7 days.	Network User Activity 3.0
Best Answers From External Members 2.0	Questions with a best answer from an external user added in the last 7 days.	Network User Activity 3.0
Questions 2.0	Questions added in the last 7 days.	Network User Activity 3.0
Questions From New Members 2.0	Questions added in the last 7 days by new members. A member is considered new if they joined the community less than 30 days ago.	Network User Activity 3.0
Questions With Answers From New Mem 2.0	Questions with answers from new members in the last 7 days. A member is considered new if they joined the community less than 30 days ago. This report is sorted by the most recent question.	Network User Activity 3.0
Questions With New Answers 2.0	Questions with a new answer that has been added in the last 7 days. This report is sorted by the most recent answer.	Network User Activity 3.0
Questions Without A Best Answer 2.0	Questions with answers in the last 7 days that still don't have a best answer.	Network User Activity 3.0
Questions Without Answers 2.0	Questions added in the last 7 days that haven't been answered.	Network User Activity 3.0
✦ Questions With and Without Best Answers	All community questions, including answer count, and whether there is a best answer.	✦ Network Feed Activity

Topics Insights

Use the Topics Insights page to keep an eye on recent topics.

With Topics Insights, you can:

- Manage topic assignments
- Monitor new topics

Report Name	Description	Custom Report Type
Topics Added 2.0	Topics created in the last 7 days.	Network Topics 3.0
Topics Assigned 2.0	Topics assigned in the last 7 days.	Network Topic Assignments 3.0
Topics Most Talked About 2.0	Topics created in the last 7 days with the highest "Talked About" score.	Network Topics 3.0

Community Management Dashboards Descriptions

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

After installing the package, when you view the dashboards from Community Management or Community Workspaces, reports automatically display data specific to the community you're accessing the report from. To view data from across all your communities, view the dashboard in your internal Salesforce org.

Important: For the package without Chatter, you only get: two home dashboards and the Overview, Members, and Licenses Usage dashboards.

Note:

- Trending metrics are calculated daily and the calculation starts the day after a release. Trending metrics work only in Salesforce orgs with an active status. To collect trending metrics in non-active orgs, contact Salesforce.
- Filtering is not supported on standard report types.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Service Community Scorecard
Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

Home Dashboard and Reports
When you access Community Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

Overview Dashboard and Reports
Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

Activity Dashboard and Reports
Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

Chatter Edits Reports
Use these reports to track Chatter edits in your community.

Community Search Dashboard and Reports
Use the Community Search Dashboard to track search activity in the community.

Files Dashboard and Reports
Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

Custom Recommendations Dashboard and Reports
Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

Groups Dashboard and Reports
Use the Groups dashboard to monitor feed and member activity in Chatter groups.

Members Dashboard and Reports
Use the Members dashboard to track community membership, new members added, and external member logins over time.

Moderation Dashboard and Reports
Use the Moderation dashboard to track community moderators' and members' flagging activity.

Q&A Dashboard and Reports

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

Topics Dashboard and Reports

Use the Topics dashboard to track your community topics.

Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Community Management or Community Workspaces. These reports are provided in the **Misc Communities Reports** folder.

Service Community Scorecard

Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place.

Report Name	Description	Custom Report Type
Total Members	Total Number of community members.	Network Members 3.0
Daily Active Users	Daily report of contributors and observers in the community.	Network User Participation Daily Metrics
Top 10 Members By Reputation	Top 10 community members ranked by Reputation points.	Network Members 2.0
Top Unanswered Questions	Top unanswered questions with the most likes.	Network User Activity 2.0
Searches With No Results (30 Days)	Searches yielding zero results within the last 30 days.	Community Search 2.0
New Members (7 Days)	New members within the last 7 days.	Network Members 3.0
New Members with Profile Pic	New member report indicating which members have added a profile picture and which have not.	Network Members 3.0
New Members (90 Days)	New members within the last 90 days.	Network Membership Daily Metrics 2.0
Cases Opened	Ratio of open cases to closed cases.	Cases
Case Resolution Time	Weekly report on the average case resolution time.	Cases
Oldest Open Cases	Report on open cases ranked from oldest to newest.	Cases
Topics Most Talked About 3.0	Topics created in the last 7 days with the highest "Talked About" score.	Network Topics 3.0
Questions vs. Best Answers	Daily report comparing the number of questions asked to the number of best answers given.	Network Activity Daily Metrics 2.0
Active Members	Number of active members.	Network Members 3.0

Home Dashboard and Reports

When you access Community Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

In Summer '17, we are shipping a new dashboard called Service Community Scorecard as the default Home dashboard. If you have a service community, this is definitely the Home dashboard you will want to use.

If you have another type of community, you may want to pick from the older set of Home dashboards available. We provide dashboards for short-term and long-term data, with options for self-service communities and communities with or without Chatter.

Note: If you are installing the package for the first time, you will automatically see the Service Community Scorecard as your Home dashboard. If you are upgrading, you will have to map the scorecard to Home manually.

To change the mapping of the dashboard, go to **Dashboards** > **Settings** in Community Management. If you've enabled Community Workspaces, the Home dashboard is in the Dashboards workspace.

IN THIS SECTION:

Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

Home Reports

These reports are provided in the **Community Management Home Reports** folder.

Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Service Community Scorecard	Dashboard for communities with Chatter.	✅	
Activity in Your Community in the Last 90 Days		✅	
Activity in Your Community in the Last 12 Months		✅	
Activity in Your Self-Service Community in the Last 90 Days	Dashboard for self-service communities, such as communities using the Napili template.	✅	

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Activity in Your Self-Service Community in the Last 12 Months		✓	
Activity in Your Community in the Last 30 Days	Dashboard for communities without Chatter.		✓
Activity in Your Community in the Last 12 Months			✓

Home Reports

These reports are provided in the **Community Management Home Reports** folder.

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Active Contributors	Total number of members who created a post or comment in the last 30 days in groups of user profiles.	Network Login History 5.0	✓	
Active Users	Total number of external users who logged in at least once in the last 30 days.	Network Login History 5.0	✓	✓
Answers	Total number of answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers	Total number of best answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Daily Trend	Daily trending report on best answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Monthly Trend	Monthly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Weekly Trend	Weekly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	✓	
Comments	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Contributions	Total number of posts and comments in the last 30 days across groups and user profiles.	Network Activity Daily Metrics 2.0	✓	
Contributions - Monthly Trend	Monthly trending report on the number of posts and comments in groups or user profiles in your community.	Network Activity Daily Metrics 2.0	✓	

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	✓	
File Activity - Monthly Trend	Monthly trending report on the total number of files uploaded and downloaded in groups or user profiles in the last 12 months.	File and Content Report	✓	
File Downloads	Total number of files downloaded from groups or user profiles in the last 30 days.	File and Content Report	✓	
File Uploads	Total number of files uploaded to groups or user profiles in the last 30 days.	File and Content Report	✓	
Logins	Total number of logins to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✓	✓
Logins - Daily Trend	Daily trending report on member logins in the last 30 days. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins - Monthly Trend	Monthly trending report on member logins in your community. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins External - Monthly Trend	Monthly trending report on customer and partner member logins in your community. This report doesn't include logins from employees.	Network Membership Daily Metrics 2.0	✓	
Members	Total number of members in the community.	Network Members 3.0	✓	✓
New Members	Total number of new members added to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✓	✓
New Members - Monthly Trend	Monthly trending report on new members added in your community.	Network Membership Daily Metrics 2.0	✓	✓
Page Views - Monthly Trend	Monthly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	✓	
Page Views - Weekly Trend	Weekly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	✓	
Posts	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Q&A - Monthly Trend	Monthly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	✓	

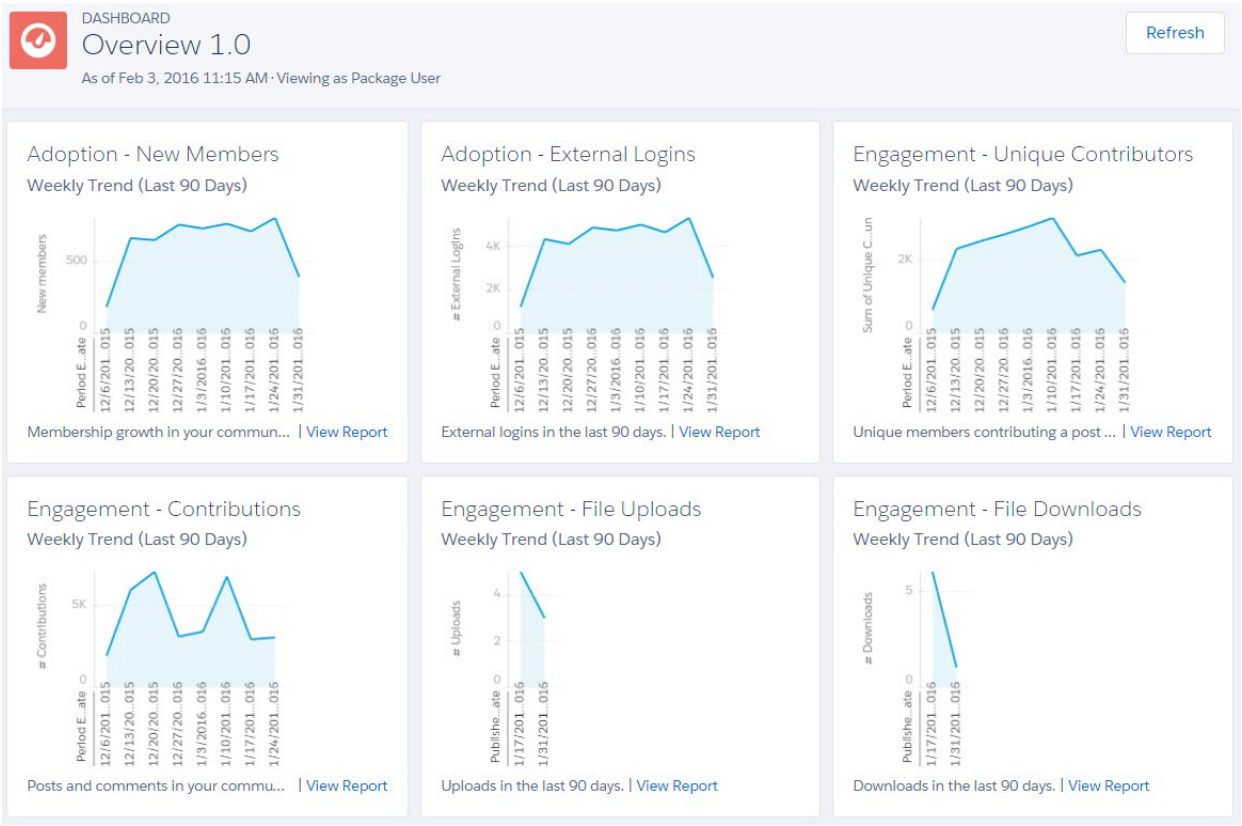
Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Q&A - Weekly Trend	Weekly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	✅	
Questions	Total number of questions in the last 30 days.	Network Activity Daily Metrics 2.0	✅	
Topics	Total number of topics assigned to discussions in groups or user profiles in the last 30 days.	Network Topic Assignments 3.0	✅	
Total Daily New Members	Total number of new members added to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✅	✅
Unique Contributors - Daily Trend	Daily trending report on the number of unique daily contributors in the last 30 days. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Public Usage Daily Metrics 2.0	✅	
Unique Contributors - Monthly Trend	Monthly trending report on the average unique daily contributors in your community. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Unique Contributor Daily Metrics 2.0	✅	
Unique Visitors - Monthly Trend	Monthly trending report of the daily unique visitors, people that visited the community at least once that day, in the last 12 months.	Network Public Usage Daily Metrics 2.0	✅	

Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

With this dashboard, you can see:

- How contributions are trending
- How group membership is trending
- How topics and assignments are trending
- How question and answers are trending
- How files are trending



Important: For information about the reports provided in the Overview dashboard for the package without Chatter, refer to what's installed in your org.

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.	File and Content Report	✓
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	✓
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✓
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	✓
New Members (Last 90 Days Trend)	Newly joined members in the last 90 days.	Network Membership Daily Metrics 2.0	✓
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	✓

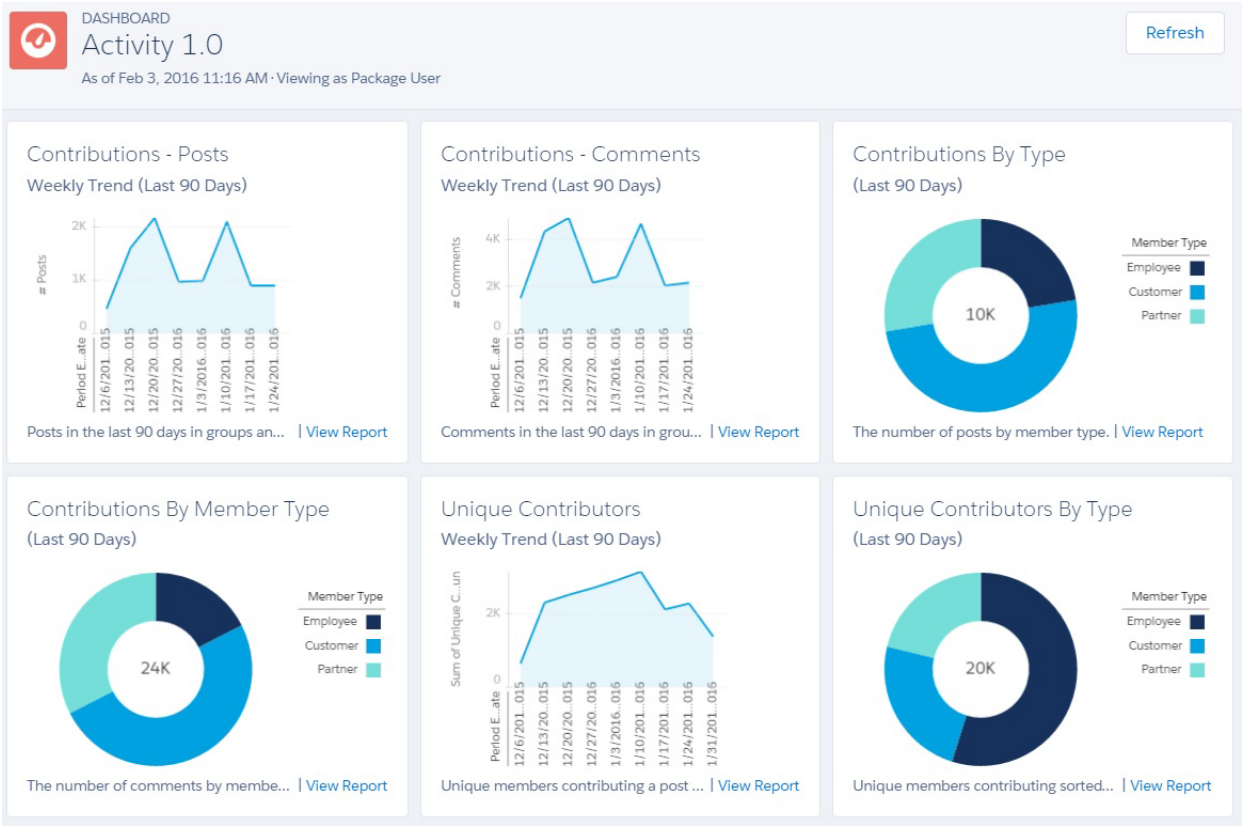
Report Name	Description	Custom Report Type	On Dashboard?
T - Topics Assigned L90D	Topics assigned in the last 90 days.	Network Topic Assignments 3.0	✓
T - Topics Created L90D	Topics added in the last 90 days.	Network Topics 2.0	✓

Activity Dashboard and Reports

Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

With this dashboard, you can answer:

- How many posts and comments are there?
- How many members are contributing and are there any members that aren't contributing?
- Which posts are the most commented on or liked?



Important: This dashboard and its reports are *only* available in the package with Chatter.

Report Name	Description	Custom Report Type	On Dashboard?
A - # Comments	Total number of comments in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Comments L30D	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post	The average number of comments per post.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post L30D	The average number of comments per post in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Members Contributing L30D	Members who have contributed to Chatter in the last 30 days.	Network Members 2.0	
A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Network Members 2.0	
A - # Posts	Total number of posts in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Posts L30D	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - Contributions By Member Type L90D	Trending report on posts and comments in the last 90 days in groups and user profiles, sorted by member type.	Network Activity Daily Metrics 2.0	✅
A - Contributions L90D	Trending report on posts and comments in the last 90 days in groups and user profiles.	Network Activity Daily Metrics 2.0	✅
A - Unique Contributors By Type L90D	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✅
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment on a given day in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✅

Chatter Edits Reports

Use these reports to track Chatter edits in your community.

These reports aren't associated with a dashboard, but you can find them in the Communities Reports folder.

Important: These reports are *only* available in the package with Chatter.

Tip: If you want to report on Chatter edits in your internal Salesforce org, use the reports in the **Chatter Reports** folder.

Report Name	Description	Custom Report Type
CH - # Chatter Edits	Number of Chatter edits made in the community.	Network Chatter Edits 1.0

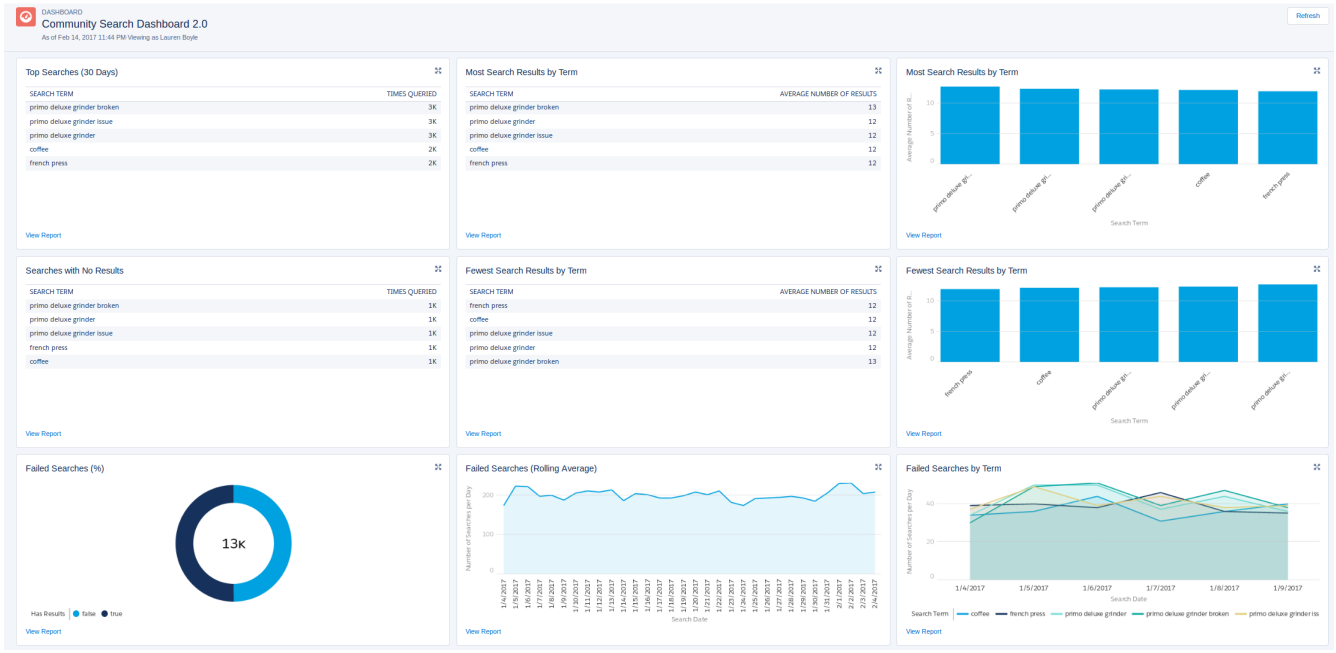
Report Name	Description	Custom Report Type
CH - Chatter Edits By Feed Type	Distribution of community Chatter edits by feed type: posts or comments.	Network Chatter Edits 1.0
CH - Chatter Edits By Member Type	Distribution of community Chatter edits by member type: internal, partner, or customer.	Network Chatter Edits 1.0
CH - Daily Chatter Edits L30D	Daily trend of Chatter edits in the community.	Network Chatter Edits 1.0

Community Search Dashboard and Reports

Use the Community Search Dashboard to track search activity in the community.

With the Community Search Dashboard, you can track:

- Which terms are being search for by community members?
- How many members are searching for a term on a specific day?
- How many community users are logged in when they enter a search term?
- What type of community member is searching for a term?



Important: This dashboard and its reports are available *only* in communities using the Customer Service template using an uncustomized Search component. Search reports can only run in production environments. Reports show the last 30 days of information because that is the amount of information stored.

Report Name	Description	Custom Report Type	On Dashboard?
Autocomplete Click-Through % (Last 30 Days)	What percentage of autocomplete search results had a successful click?	Community Searches 2.0	✅

Report Name	Description	Custom Report Type	On Dashboard?
Autocomplete Search Usage (30 Days)	Are users clicking on suggested search results?	Community Searches 2.0	✓
Logged-In vs Guest Search (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	How many community users are logged in when they enter a search term?	Community Searches 2.0	✓
Most Autocomplete Clicks (30 Days)	Which search terms led to the most clicks of suggested search results?	Community Searches 2.0	✓
Number of Results Per Term (30 Days)	How many search results are returned per search term?	Community Searches 2.0	✓
Search Frequency by Term (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	Which terms are being searched for by community members?	Community Searches 2.0	✓
Searches by Member Type (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	What type of community member is searching for a term?	Community Searches 2.0	✓
Search Result Outcomes (30 days)	How many searches had results?	Community Searches 2.0	✓
Searches w/ No Results, by Day (30 Days)	Which search terms had zero results on any given day?	Community Searches 2.0	✓
Searches w/ No Results by Type (30 Days)	What type of community member is searching for a term, and did it have results?	Community Searches 2.0	✓
Searches with Zero Results (30 Days)	How many search results are returned per search term?	Community Searches 2.0	✓

Files Dashboard and Reports

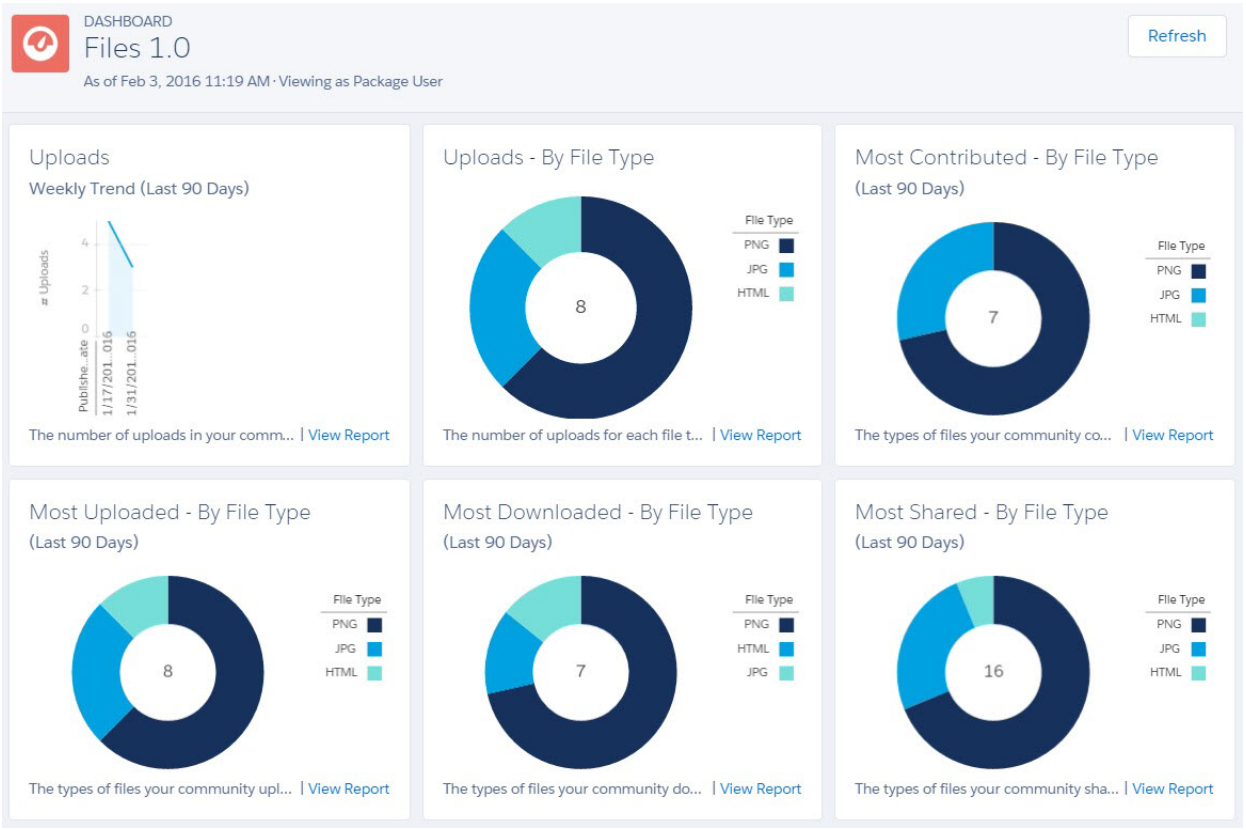
Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

With this dashboard, you can answer:

- How many file uploads and downloads are there?
- Are there any file trends?
- What type of files are being distributed the most or least?

- How is file engagement?
- Which members are driving file engagement?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
C - # File Contributions	The total number of file contributions, defined as posts and comments.	File and Content Report	
C - # File Downloads	The total number of files downloaded.	File and Content Report	
C - # File Likes	The total number of file likes.	File and Content Report	
C - # File Shares	The total number of files shares.	File and Content Report	
C - # File Uploads	The total number of files uploaded.	File and Content Report	
C - File Activity By File Type L90D	Reports on the types of files uploaded and downloaded in your community.	File and Content Report	✅

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.		✅
C - File Sharing Monthly	Monthly trending report on the number of file shares in your community.	File and Content Report	
C - File Uploads Distribution By Type	Distribution of files uploaded by file type.	File and Content Report	✅
C - New Files Trending By Contributions	Files uploaded in the last 30 days with the most posts and comments.	File and Content Report	
C - New Files Trending By Downloads	Files uploaded in the last 30 days with the most downloads.	File and Content Report	
C - New Files Trending By Likes	Files uploaded in the last 30 days with the most likes.	File and Content Report	
C - Top 10 Users - Most File Contrib L30D	Top 10 users who received the largest number of posts and comments on their files in the last 30 days. Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.	File and Content Report	
C - Top 10 Users - Most File Likes L30D	Top 10 users who received the largest number of likes on their files in the last 30 days. Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.	File and Content Report	
C - Top 10 Users - Most File Uploads	Top 10 users who uploaded the largest number of files.	File and Content Report	

Custom Recommendations Dashboard and Reports

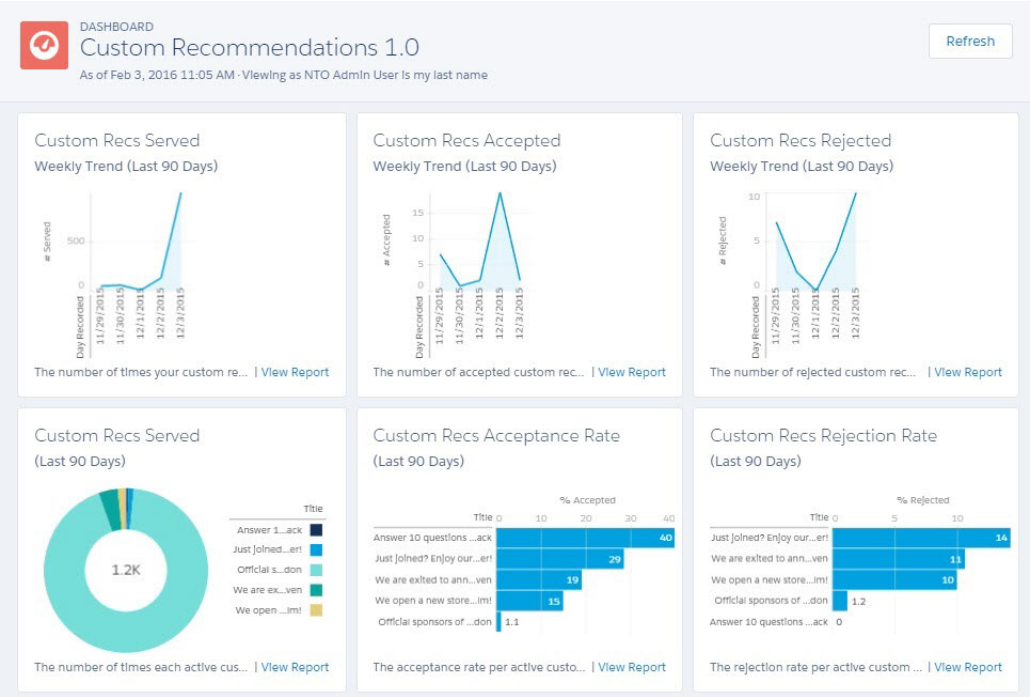
Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

You can see how often your recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.

With this dashboard you can answer:

- Which recommendations are being clicked the most?
- Which recommendations are being rejected the most?
- Are my custom channels helping my recommendations?

Important: This dashboard and its reports are *only* available in the package with Chatter.



IN THIS SECTION:

Recommendations FAQ
Frequently asked questions about recommendations.

Recommendations FAQ

Frequently asked questions about recommendations.

What does it mean when a recommendation is served?

A recommendation is served when it's displayed on a page, including when the page refreshes.

What does it mean when a recommendation is accepted?

A recommendation is accepted when a member clicks the button text, such as "Buy Now."

What does it mean when a recommendation is rejected?

A recommendation is rejected when a member clicks "I'm not interested."

How is the acceptance rate calculated?

The acceptance rate equals the total number of times a member clicks the recommendation, divided by the total number times the recommendation was served (displayed) in your community. For example, if a custom recommendation is clicked by 100 members and it was served 1,000 times, the acceptance rate is 10%.

How is the rejection rate calculated?

The rejection rate equals the total number of times a member dismisses the recommendation, divided by the total number of times the recommendation was served (displayed) in your community. For example, if a custom recommendation is dismissed 100 times and it was served 1,000 times, the rejection rate is 10%.

What are channels?

Channels group recommendations together so you can determine where they show up in your community.

Report Name	Description	Custom Report Type	On Dashboard?
R - Channel Recommendations Details	Details for your custom recommendation channels. This includes information about your channels being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	✅
R - Channel Recommendations L90D	Custom recommendation channel trends by acceptance rate, rejection rate, and number of times it was served (displayed) in the last 90 days.	Network Custom Recommendations 1.0	✅
R - Custom Recommendations Details	Details for your custom recommendations. This includes information about your recommendations being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	✅
R - Custom Recommendations L90D	Top custom recommendations over time. This includes details about how many of your custom recommendations were served, accepted (clicked), or rejected (dismissed) in the last 90 days.	Network Custom Recommendations 1.0	✅

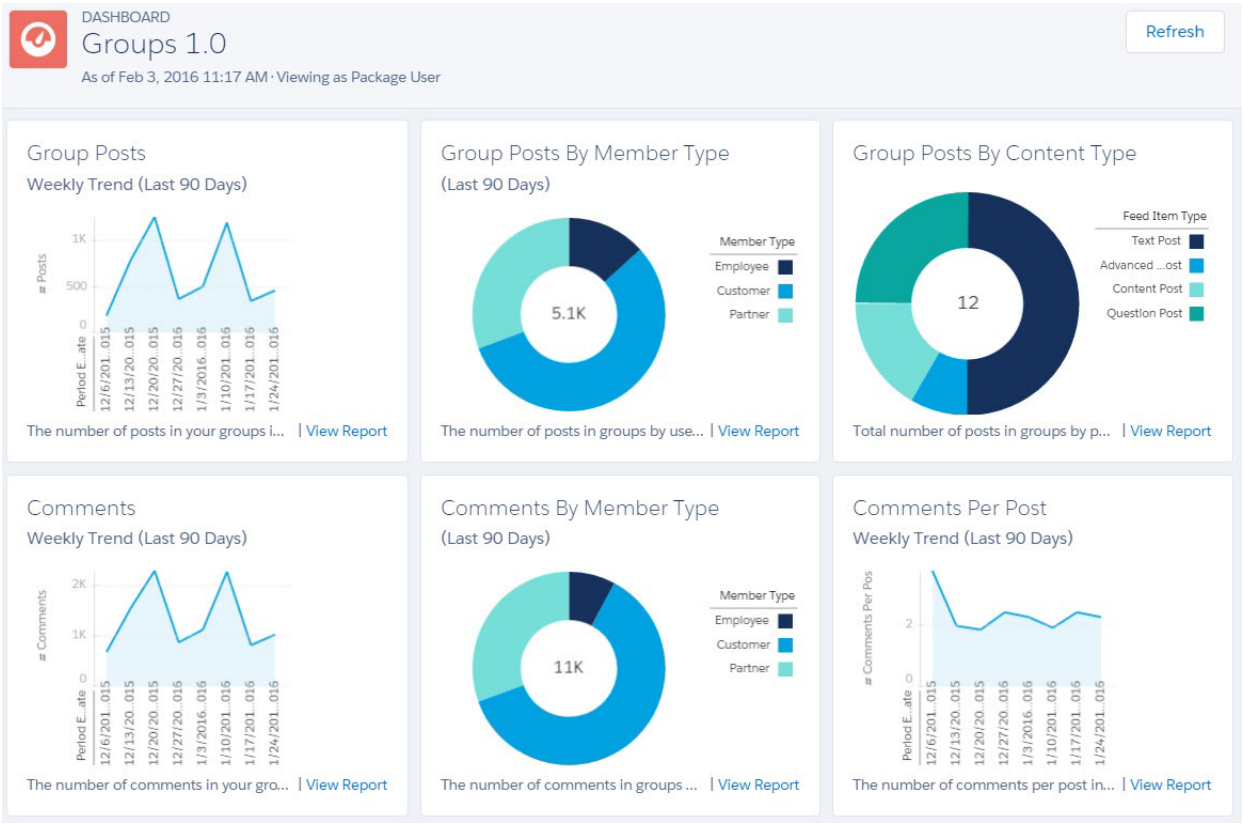
Groups Dashboard and Reports

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

With this dashboard, you can answer:

- Which groups are most active?
- Which groups are growing the fastest?
- Who are the top contributors?
- How many posts and comments are there in groups?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
G - # Group Comments	Total number of comments in active groups.	Network Group Activity 3.0	
G - # Group Comments L30D	Total number of comments in active groups, in the last 30 days.	Network Group Activity 3.0	
G - # Group Comments Per Post	Total number of comments per post in groups, in the last 30 days.	Network Activity Daily Metrics 2.0	
G - # Group Comments Per Post L30D	Total number of comments per post in groups.	Network Activity Daily Metrics 2.0	
G - # Group Members	Total number of active members across all non-archived groups.	Network Group Members 2.0	
G - # Group Members Added L30D	Total number of active members added in the last 30 days across all non-archived groups.	Network Group Members 2.0	
G - # Group Posts	Total number of posts in active groups.	Network Group Activity 3.0	
G - # Group Posts L30D	Total number of posts in active groups, in the last 30 days.	Network Group Activity 3.0	

Report Name	Description	Custom Report Type	On Dashboard?
G - # Groups	Total number of groups.	Network Group Membership 2.0	
G - # Groups Added L30D	Total number of active groups created in the last 30 days.	Network Group Membership 2.0	
G - Active Groups L90D	Reports on groups with activity, such as posts and comments, in the last 90 days.	Network Group Activity 3.0	✅
G - Group Activity L90D	Trend on the number of posts and comments in your groups in the last 90 days.	Network Activity Daily Metrics 2.0	✅
G - Group Activity By User Type L90D	Reports on the number of contributions in groups by user type, such as partner, customer, or employee in the last 90 days.	Network Activity Daily Metrics 2.0	✅
G - Top 10 Groups By Contributions	Top groups by contributions.	Network Group Activity 3.0	✅
G - Top 10 Groups By Members	Top groups by members. Excludes members of archived groups and inactive users.	Network Group Activity 3.0	✅
Group Posts By Type	Posts in groups by post type.	Network Group Activity 3.0	✅

Members Dashboard and Reports

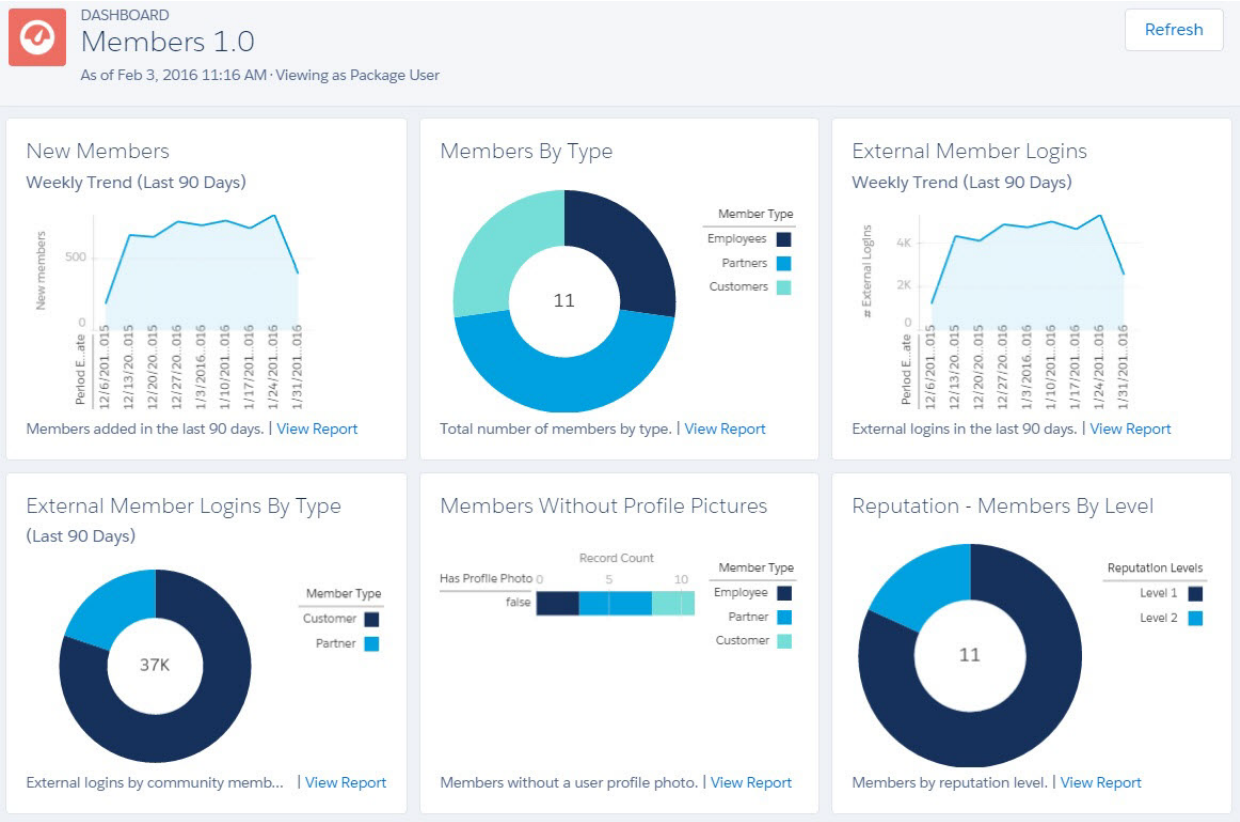
Use the Members dashboard to track community membership, new members added, and external member logins over time.

With this dashboard, you can answer:

- How many members are there and how many are new?
- Which members are logging in the most?
- Which new members are logging in the most?

Tip: If your community is not using the reputation feature, you can remove the reports and metrics associated with the feature.

Important: For information about the reports provided in the Members dashboard for the package without Chatter, refer to what's installed in your org.



Report Name	Description	Custom Report Type	On Dashboard?
M - # Member Logins L30D	Total number of members who logged in during the last 30 days.	Network Login History 5.0	
M - # Members	Total number of active members.	Network Members 2.0	
M - # Members Added L30D	Total number of active members added to the community in the last 30 days.	Network Members 2.0	
M - Members By Reputation Level	Total number of members by reputation level. To use this report, you must update the Reputation Level field and map it to your reputation levels and points.	Network Members 2.0	✅
M - Members With No Profile Photo	Reports on members without a user profile photo.	Network Members 2.0	✅
M - Top 10 Members By Reputation Points	Top 10 members with the highest reputation points.	Network Members 2.0	✅
Members by Type	Total number of members by type.	Network Members 2.0	✅

Report Name	Description	Custom Report Type	On Dashboard?
New Members (Last 90 Days Trend)	New members in the last 90 days.	Network Membership Daily Metrics 2.0	✓
New Member 1.0	Total number of new members added to the community in the last 7 days.	New Members	
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	✓

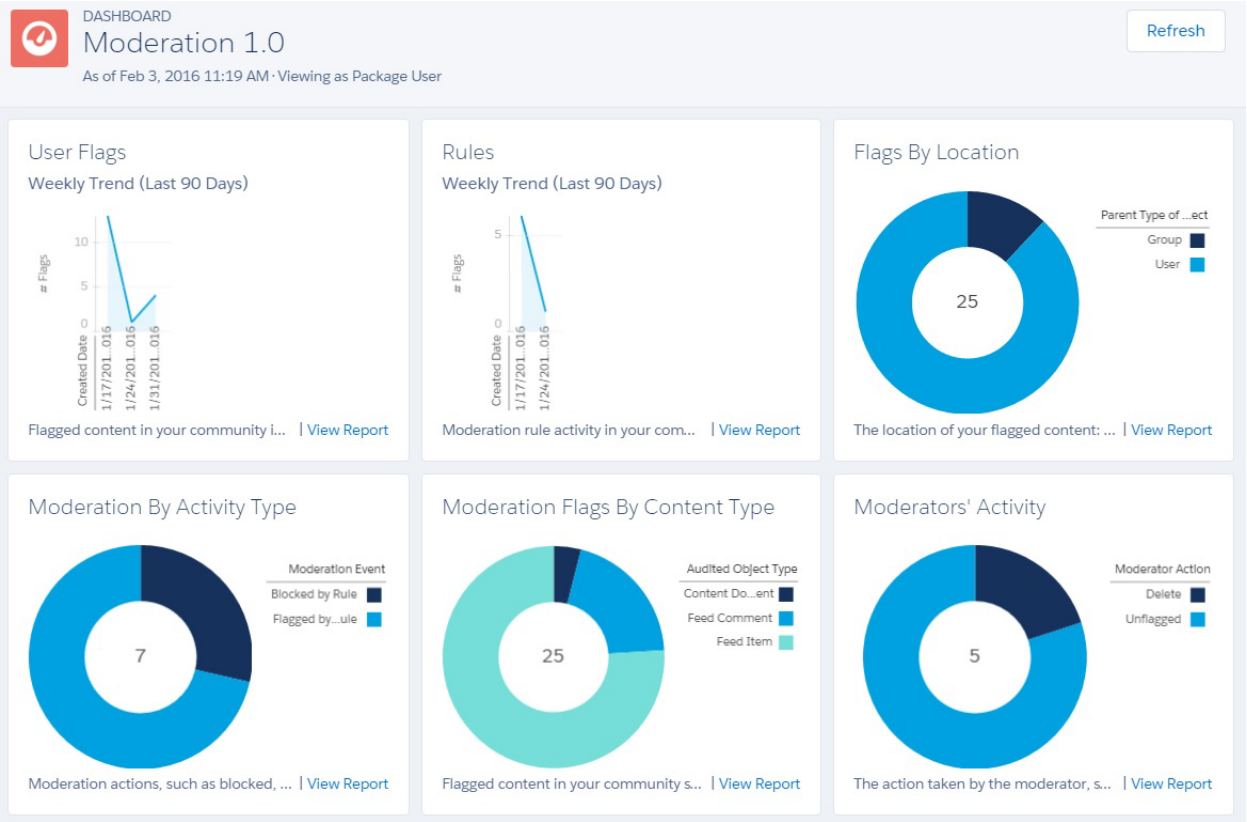
Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

With this dashboard, you can answer:

- How many flags are there?
- Who is flagging content?
- Who is removing flags?
- How many private messages are being sent?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
MO - # Flagged Items Deleted	Total number of flagged items deleted by moderators.	Network Moderation 2.0	
MO - # Flags	Total number of flagged items.	Network Moderation 2.0	
MO - # Flags L30D	Total number of flagged items in the last 30 days.	Network Moderation 2.0	
MO - # Flags Removed	Total number of flags removed by moderators or users unflagging content.	Network Moderation 2.0	
MO - # Messages Sent	Total number of private messages sent in the community.	Network Private Messages 2.0	
MO - # Messages Sent L30D	Total number of private messages sent in the last 30 days in the community	Network Private Messages 2.0	
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	✅

Report Name	Description	Custom Report Type	On Dashboard?
MO - Flagged Item Location	Reports on the location of your flagged content, in user profiles or in groups.	Network Moderation 2.0	✅
MO - Flagged Item Type	Flagged content in your community sorted by object type, such as files, posts, comments, and private messages.	Network Moderation 2.0	✅
MO - Moderator Action	Reports on the action taken by the moderator, such as removing the flag on a post or deleting the flagged post.	Network Moderation 2.0	✅
MO - Rule Action	Reports on moderation actions, such as blocked, flagged, or replace.	Network Moderation 2.0	✅
MO - Rule Activity L90D	Trending report on moderation rule activity in your community in the last 90 days.	Network Moderation 2.0	✅
MO - Top 10 Message Senders L30D	Top 10 members sending the most private messages in the last 30 days.	Network Private Messages 2.0	

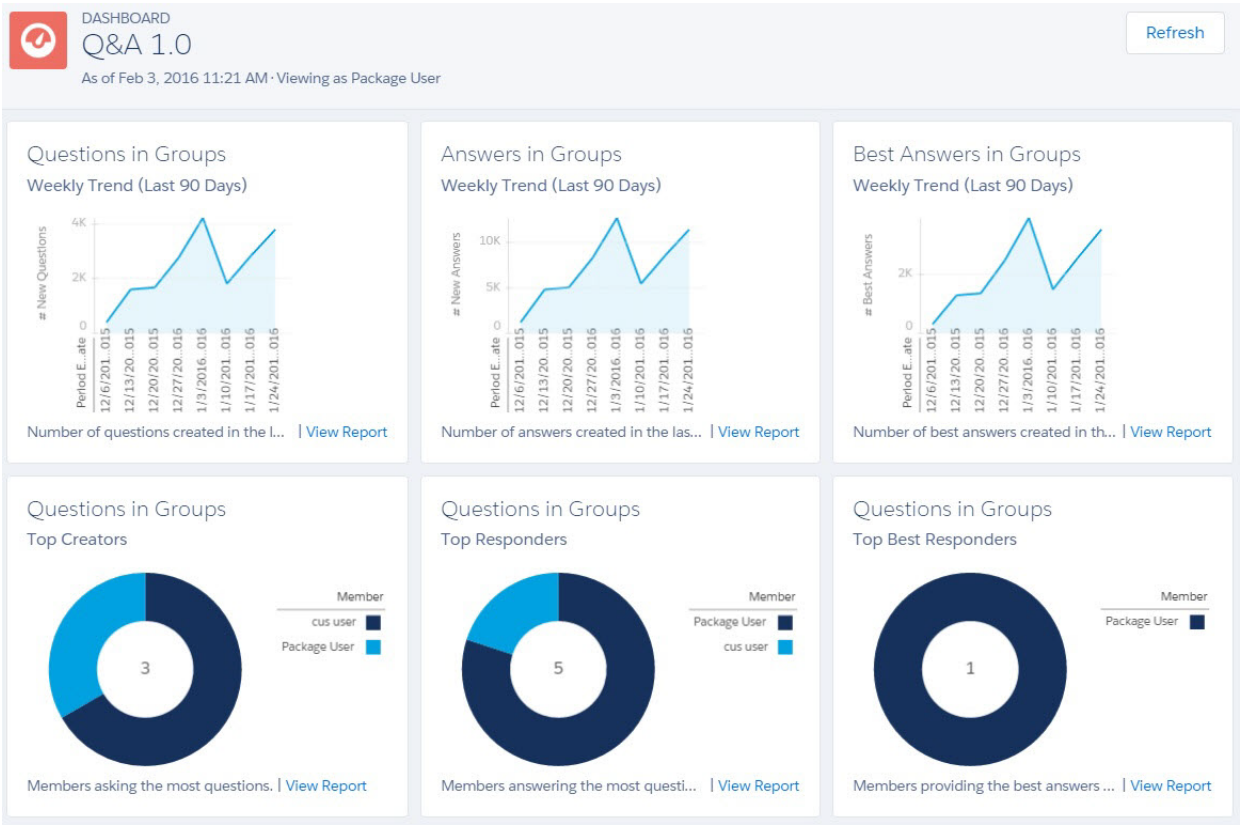
Q&A Dashboard and Reports

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

To track the same activity in user profiles, use the Self-Service Dashboard. With this dashboard you can answer:

- How many questions and answers are there per month?
- How many unanswered questions are there?
- How many questions without best answers are there?
- Who are the top question creators and question responders?
- How are questions and answers trending?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
Q - # Answers in Groups	Total number of answers in groups.	Network Group Activity 2.0	
Q - # Answers in Groups L30D	Total number of answers in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Best Answers in Groups	Total number of best answers in groups.	Network Group Activity 2.0	
Q - # Questions in Groups	Total number of questions posted in groups.	Network Group Activity 2.0	
Q - # Questions in Groups L30D	Total number of questions posted in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Unanswered Questions in Groups	Total number of unanswered questions in groups.	Network Group Activity 2.0	
Q - % Of Qs With Best Answers in Groups	Percentage of answered questions that have best answers in groups.	Network Group Activity 2.0	
Q - Answered Questions Groups L90D	Answered questions in groups in the last 90 days.	Network Group Activity 2.0	✅

Report Name	Description	Custom Report Type	On Dashboard?
Q - Answers in Groups L90D	Trend of answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✅
Q - Best Answers in Groups L90D	Trend of best answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✅
Q - Questions in Groups L90D	Trend of questions in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✅
Q - Top 10 Best Q Responders in Groups	Top 10 users responding to questions with the best answers.	Network Group Activity 2.0	✅
Q - Top 10 Question Creators in Groups	Top 10 users with the most questions	Network Group Activity 2.0	✅
Q - Top 10 Question Responders in Groups	Top 10 users responding to questions	Network Group Activity 2.0	✅
Q - Unanswered Questions Groups L90D	Unanswered questions in groups in the last 90 days.	Network Group Activity 2.0	✅
Unanswered Questions	Number of unanswered questions.	New Members 1.0	

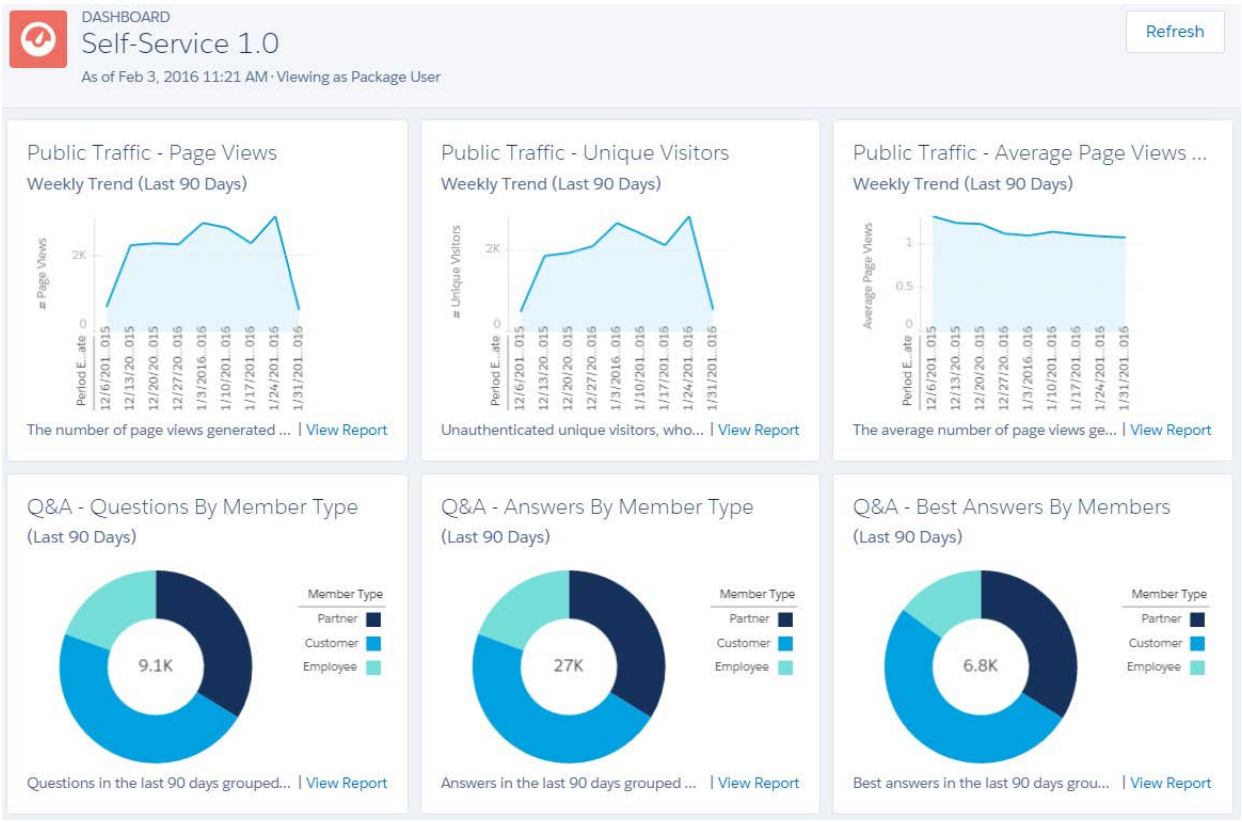
Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

You can track recent activity for questions and answers posted on user profiles. To track the same activity in groups, use the Q&A Dashboard and Reports. With this dashboard you can answer:

- How many questions, unanswered questions, and answers there are in users profiles?
- How many daily page views and unauthenticated unique visitors does my community have?
- Who is creating and responding to questions?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
S - # Answers in User Profiles	Total number of answers in user profiles.	Network User Activity 2.0	
S - # Answers in User Profiles L30D	Total number of answers in the last 30 days in user profiles.	Network User Activity 2.0	
S - # Average Page Views per UV	Average number of page views per unique visitor.	Network Public Usage Daily Metrics 2.0	
S - # Best Answers in User Profiles	Total number of best answers in user profiles.	Network User Activity 2.0	
S - # Page Views L30D	Total number of page views in the last 30 days.	Network Public Usage Daily Metrics 2.0	
S - # Questions in User Profiles	Total number of questions posted in user profiles.	Network User Activity 2.0	
S - # Questions in User Profiles L30D	Total number of questions posted in the last 30 days in user profiles.	Network User Activity 2.0	

Report Name	Description	Custom Report Type	On Dashboard?
S - # Unanswered Qs in User Profiles	Total number of unanswered questions in user profiles.	Network User Activity 2.0	
S - % Of Qs With Best Answer User Profile	Percentage of answered questions that have best answers in user profiles.	Network User Activity 2.0	
S - Answers By User Type L90D	Answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✅
S - Answers in User Profiles L90D	Answers in the last 90 days.	Network Activity Daily Metrics 2.0	✅
S - Avg Page Views By Visitors L90D	Reports on the average page views generated by visitors for the last 90 days.	Network Public Usage Daily Metrics 2.0	✅
S - Best Answers By User Type L90D	Best answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✅
S - Best Answers in User Profiles L90D	Best answers in the last 90 days.	Network Activity Daily Metrics 2.0	✅
S - Page Views L90D	Reports on the number of page views generated by guest users for the last 90 days in your self-service community. Note: The number of page views might not match other analytics tools, as all tools use different methods for counting page views.	Network Public Usage Daily Metrics 2.0	✅
S - Questions By User Type L90D	Questions in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✅
S - Questions in User Profiles L90D	Questions in the last 90 days.	Network Activity Daily Metrics 2.0	✅
S - Top 10 Best Q Respd in User Profiles	Top 10 users responding to questions with the best answer.	Network User Activity 2.0	
S - Top 10 Q Creators in User Profiles	Top 10 users with the most questions.	Network User Activity 2.0	
S - Top 10 Q Responders in User Profiles	Top 10 users responding to questions.	Network User Activity 2.0	
S - Unique Visitors L90D	Reports on unauthenticated unique visitors, who visited the site at least once that week, in the last 90 days in your self-service community. This includes visitors accessing the login and logout pages.	Network Public Usage Daily Metrics 2.0	✅

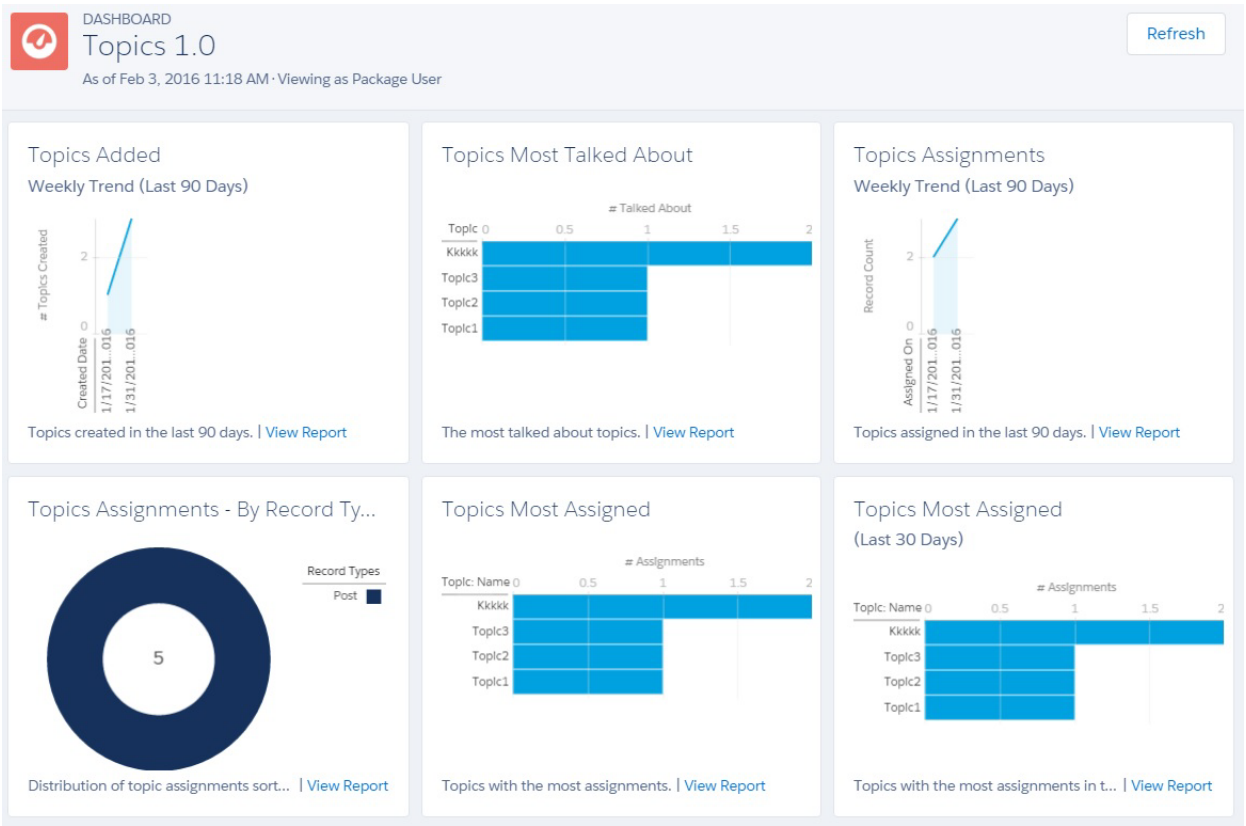
Topics Dashboard and Reports

Use the Topics dashboard to track your community topics.

With this dashboard, you can see:

- How are topics trending?
- How many topics are getting assigned?
- Who's assigning topics?
- Which topics are being talked about?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
T - # Topics	Total number of topics.	Network Topics 2.0	
T - # Topics Added L30D	Total number of topics added in the last 30 days.	Network Topics 2.0	
T - # Topics Assigned	Total number of topics assigned.	Network Topic Assignments 3.0	
T - # Topics Assigned L30D	Total number of topics assigned in the last 30 days.	Network Topic Assignments 3.0	

Report Name	Description	Custom Report Type	On Dashboard?
T - Top 10 Topic Assigners	Top 10 users with the largest number of topics assigned.	Network Topic Assignments 3.0	✅
T - Top 10 Topic Assigners L30D	Top 10 users with the largest number of topics assigned in the last 30 days.	Network Topic Assignments 3.0	✅
T - Top 10 Topics By Assignment	Top 10 topics with the most assignments.	Network Topic Assignments 3.0	✅
T - Top 10 Topics By Assignment L30D	Top 10 topics with the most assignments in the last 30 days.	Network Topic Assignments 3.0	✅
T - Top 10 Trending Topics	Top 10 topics with the largest number of "Talking About" indicators.	Network Topics 2.0	✅
T - Topics Assignments By Record Type	Distribution of topic assignments sorted by the Record Types field (unmapped record types show as Other). Note: You can create values for the Record Types field to map custom objects or other types that are not predefined.	Network Topic Assignments 3.0	✅
T - Topics Assigned L90D	Reports on the number of topics assigned in the last 90 days.	Network Topic Assignments 3.0	✅
T - Topics Created L90D	Trending report on the number of topics created in the last 90 days.	Network Topics 2.0	✅

Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Community Management or Community Workspaces. These reports are provided in the **Misc Communities Reports** folder.

Report Name	Description	Requires	Custom Report Type
Cases	Total number of questions that escalated to cases in the last 30 days. Tip: You can use this report on your Home Dashboards.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
✦ Community CDN Usage Report	Displays the community's content delivery network (CDN) consumption by domain.		CDN Usage

Report Name	Description	Requires	Custom Report Type
Escalated To Case	Questions that have been escalated to cases. Tip: We recommend that you add this report to the **Insights Self-Service** folder so you can view this report in Community Management or Community Workspaces.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Escalated To Case Closed	Questions that have been escalated to cases and closed in the last 7 days. Tip: We recommend that you add this report to the **Insights Self-Service** folder so you can view this report in Community Management or Community Workspaces.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Messages From New Members	Private messages sent by external users in the last 7 days. This report only includes messages sent by external users who registered in the last 7 days. Tip: We recommend that you add this report to the **Moderation Audit Trail** folder so you can view this report in Community Management or Community Workspaces.	Org preference - Enable Private Messages User permission - "Manage Chatter Messages" Important: You need this user permission to see the report in your org.	Network Private Messages 3.0
Questions Escalated - Monthly Trend	Monthly trending report on questions escalated to cases in your community. Tip: You can use this report on your Community Management Home dashboard or in Community Workspacesunder **Dashboards** > **Home**.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Questions Escalated - Weekly Trend	Weekly trending report on the number of questions escalated to cases in your community in the last 90 days. Tip: You can use this report on your Community Management Home dashboard or in Community Workspaces under **Dashboards** > **Home**.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Related Questions CTR	The click-through rate for the Related Questions (RQ) widget, which is the ratio of the number of times a user clicked on the RQ widget compared to the number of times the widget was shown	Related Questions CTR 1.0	

Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Chatter Dashboard and Report
Use the Chatter dashboards and reports to track Chatter usage in your internal Salesforce org.

License Usage Dashboard and Reports
Use the License Usage 1.0 dashboard to track usage of login-based and named-user licenses so you can optimize license usage and plan for growth.

Chatter Dashboard and Report

Use the Chatter dashboards and reports to track Chatter usage in your internal Salesforce org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Internal Salesforce Org

You must view these dashboards and reports from your internal Salesforce org. If you previously installed the Salesforce Chatter Dashboards package, you must uninstall that package and use the reports and dashboards provided here instead. You can find these reports and dashboards in the **Chatter Reports** and **Chatter Dashboards** folders.

Important: These dashboard and reports are *only* available in the package with Chatter.

Warning: If you customize these Chatter reports and remove the Networks filter, they will report on Chatter usage across your entire Salesforce org, including usage from your internal org and your communities. If you view these Chatter dashboards or reports from within Community Management or Community Workspaces, only community-specific data is displayed. To create a report that returns data only from your internal org, use the Network: Name less than ! filter.

For detailed information about the Chatter dashboards, reports, and custom report types, see Get Started with Chatter Dashboards. The following components are provided in the Chatter Dashboards package:

- Chatter Overview dashboard and reports
- Chatter Adoption by Department dashboard and reports
- Chatter Files dashboard and reports
- Chatter Groups dashboard and reports
- Chatter Management dashboard and reports
- Chatter Q&A dashboard and reports
- Chatter Topics dashboard and reports
- Chatter User dashboard and reports
- Chatter Custom Report Types
- Chatter Edits reports

License Usage Dashboard and Reports

Use the License Usage 1.0 dashboard to track usage of login-based and named-user licenses so you can optimize license usage and plan for growth.

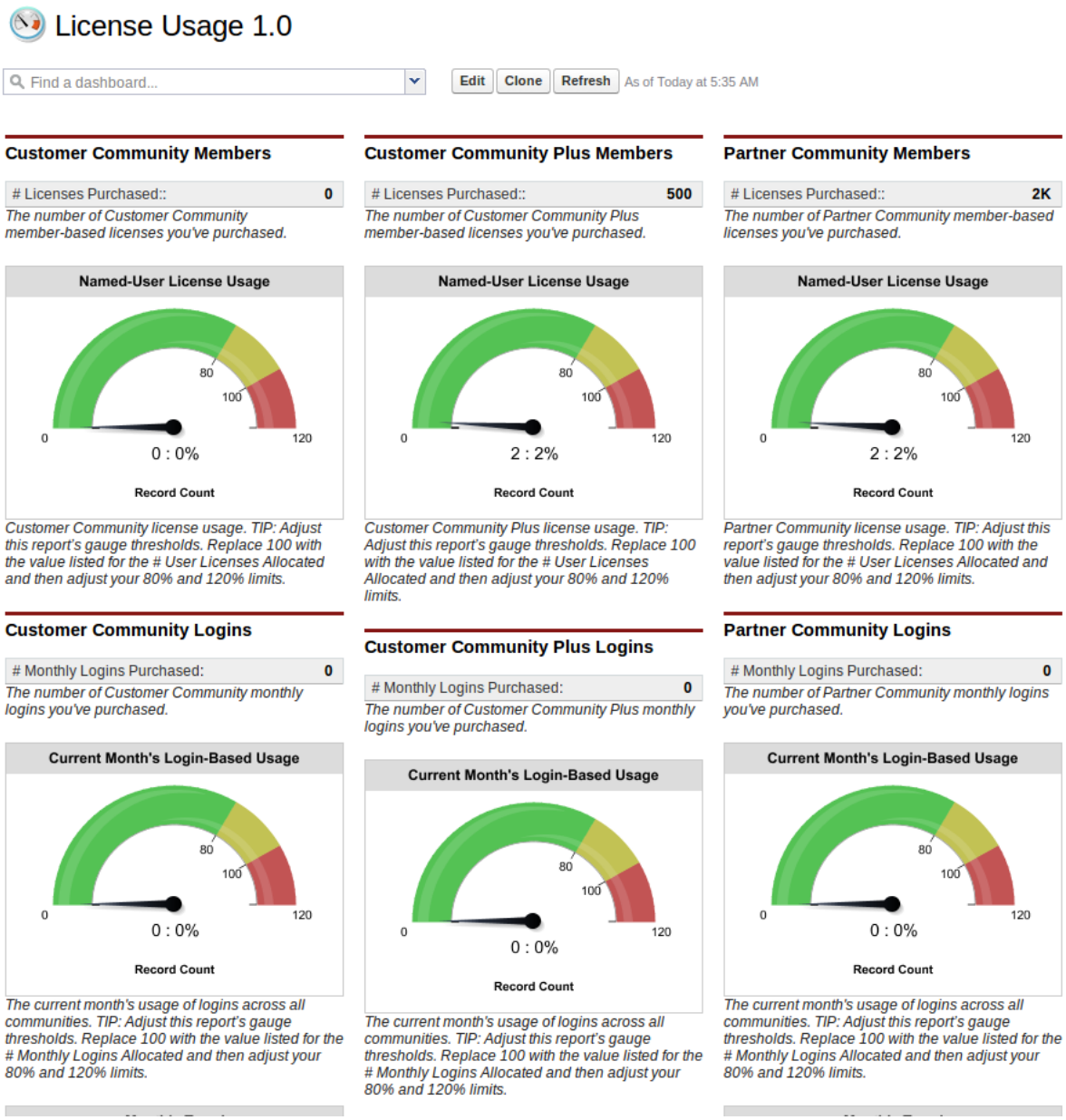
With this dashboard, you can see:

- If you need to adjust your allocated license usage
- Monthly and daily tracking of your license usage
- Predict and stop possible overages based on monthly trends

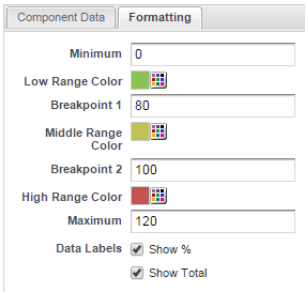
The reports in this dashboard only track community licenses. To track portal licenses, clone the reports and update the license filter.

You can find these reports and dashboards in the **Communities Reports** and **Communities Dashboards** folders.

Important: View this dashboard only from your internal Salesforce org's Dashboards tab. Viewing this dashboard in Community Management or Community Workspaces displays incorrect data as the license metrics become community- specific and not org-wide. For this reason, we recommend that you don't map this dashboard in Community Management or Community Workspaces



Note: Customize gauge reports to provide relevant ranges based on your actual number of licenses. To edit the dashboard click **Edit Attributes** on the report you want to customize. For Breakpoint 2 (set by default to 100), enter your number of allocated licenses. For Breakpoint 1 (set by default to 80), enter 80% of your allocated licenses. For Maximum (set by default to 120), enter 120% of your allocated licenses. You can also change the breakpoints to any percentage you want. For example, if you have 50 licenses, you would change 80 to 40, 100 to 50, and 120 to 60.



Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - CC Login-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community login-based license in descending order.	Network Login History 5.0	✓	✓
L - CC User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community user-based license in descending order.	Network Login History 5.0	✓	✓
L - # Cust Comm All Active Lic 2.0	Number of active members on a Customer Community license across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm All Allocated Lic 2.0	Number of Customer Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Login Members	Number of community members created with the Customer Community login-based license. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Use the Cust Comm Login Members report to get a detailed report of usage.)	Network Login History 5.0	✓	✓
L - # Cust Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - CCP Login-based - Monthly Logins 1.0	Monthly number of logins for user with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	✓	✓
L - CCP User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	✓	✓

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - # Cust Comm Plus All Active Lic	Number of active members on a Customer Community Plus license across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus All Alloct Lic 2.0	Number of Customer Community Plus licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Login Members	Number of community members created with the Customer Community Plus login-based license.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community Plus login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm All Active Lic	Number of active members on a Partner Community license across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm All Allocated Lic 2.0	Number of Partner Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Partner Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm Login Members	Number of community members created with the Partner Community login-based license.	Network Login History 5.0	✓	✓
L - Cust Comm License Usage	Customer Community user license usage across all communities. This report counts the number of users created with a Customer Community license.	Network Login History 5.0	✓	✓
L - Cust Comm Login Monthly Trend 2.0	Monthly trend of Customer Community logins compared to your allocation.	Network Login History 5.0	✓	✓
L - Cust Comm Login Monthly Usage 2.0	The current month's usage of Customer Community logins compared to your monthly allocation. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Cust Comm Plus License Usage	Customer Community Plus user license usage across all communities. This report counts the number of users created with a Customer Community Plus license. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Cust Comm Plus Login Monthly Trend 2.0	Monthly trend of Customer Community Plus logins compared to your allocation.	Network Login History 5.0	✓	✓

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - Cust Comm Plus Login Monthly Usage 2.0	The current month's usage of Customer Community Plus logins compared to your monthly allocation. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Member Distribution By License Type	The distribution of members by license type: member-based or login-based.	Network Login History 5.0	✓	✓
L - Partner Comm License Usage	Partner Community user license usage across all communities. This report counts the number of users created with a Partner Community license. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Partner Comm Login Monthly Trend 2.0	Monthly trend of Partner Community logins compared to your allocation.	Network Login History 5.0	✓	✓
L - Partner Comm Login Monthly Usage 2.0	The current month's usage of Partner Community logins compared to your monthly allocation. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - PC Login-based - Monthly Logins 1.0	Monthly number of logins for users with a Partner Community login-based license in descending order.	Network Login History 5.0	✓	✓
L - PC User-based - Monthly Logins 1.0	Monthly number of logins for users with a partner Community user-based license in descending order.	Network Login History 5.0	✓	✓
L - Public Page Views - Monthly Trend	Monthly trending report on the daily page views generated by guest users in your community.	Network Login History 5.0	✓	✓
L - Yearly Public Page Views	Yearly report on the daily page views generated by guest users in your community.	Network Login History 5.0	✓	✓

Custom Report Type Descriptions

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.

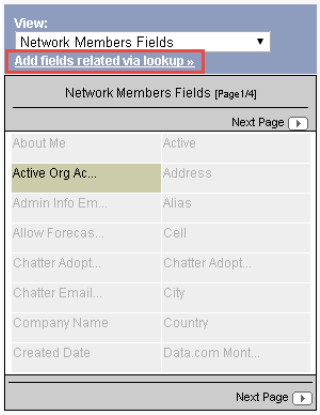
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tip: Items in custom report types that reference a user or member, such as Created By, contain the following user lookup fields: LastLoginDate, Department, Country, Role, and Profile. You can specify these additional fields to display in your report by editing the custom report type from Setup. Open the custom report type details, click **Edit Layout**, and then click **Add fields related via lookup**.

The Network Members object includes member lookup fields. With access to this detail, you can repurpose member reports to report on other things such as accounts. For example, you can make a copy of a member report and then add the User.Account field through the Network Members lookup fields. This approach allows you to use the Top 10 Members By Contribution report to create a new report called Top 10 Accounts by Contributor report. You can customize reports to provide data on the top active and inactive accounts based on the number of logins over a specific time range.



Note: Currently, you can't report on the number of accounts by type. Also, the following custom report types don't track internal users who log in to a community from their internal Salesforce org.

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
CDN Usage	Provides the amount of content delivery network (CDN) usage consumed by an org, listed by domain.	✓	✓
Chatter Activity 1.0	Provides information on Chatter user activity such as, posts, comments, and likes. The user metrics are calculated against the user activity on groups and user profiles in your organization.	✓	
Chatter Activity Daily Metrics 1.0	Provides daily trending metrics on posts and comments created in groups and user profiles in your organization. Reports based on this custom report type get data from system jobs.	✓	
Chatter Edits 1.0	Provides information on Chatter edits.	✓	

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Chatter Group Members 1.0	Provides information on groups and their members, such as the date a member joined the group.	✅	
Chatter Groups Activity 1.0	Provides information on group activity, such as posts, comments, and likes, and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	✅	
Chatter Knowledgeable Users 1.0	Provides information on knowledgeable users in your organization.	✅	
Chatter Topic Assignments 1.0	Provides information on topic assignments. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	✅	
Chatter Topics 1.0	Provides information on trending topics, topic assigners, and more.	✅	
Chatter Unique Contributor Daily Metrics 1.0	Provides information on daily unique visitors across groups and user profiles in your organization.	✅	
Chatter User Activity 1.0	Provides information on user profiles such as posts, comments, and likes, and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	✅	
Community Searches 2.0	Provides information about community's search behavior.	✅	✅
File and Content Report	Use this standard report type to track file adoption and engagement for Chatter in your internal Salesforce org or in communities. You can also track file properties (such as file version and size), file uploads, downloads, shares, links, link views, and who uploaded the content.	✅	
Network Activity Audit 1.0	Provides information about flagging and moderation activity in a community.	✅	
Network Activity Daily Metrics 2.0	Provides information for chatter activity on profiles and groups by internal, customer, and partner member types. Reports based on this custom report type get data from system jobs.	✅	
Network Cases 1.0	Provides information about cases in your Salesforce org.	✅	
Network Chatter Edits 1.0	Provides information on Chatter edits in the community.	✅	
Network Comments Pending Approval 1.0	Provides information about your community's feed comments that are pending approval.	✅	
Network Custom Recommendations 1.0	Provides information about the custom recommendations and channels in your community including; details about the	✅	✅

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
	acceptance rate, rejection rate, and number of times a recommendation was served.		
✦ Network Feed Activity	Provides information about the activity in your community's feed, including questions and answers.	✅	✅
Network Group Membership 3.0	Provides information on groups and their members, such as the date a member joined the group and the member type (internal, customer, or partner).	✅	
Network Groups Activity 3.0	Provides information on group activity (posts, comments, and likes) and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	✅	
Network Groups Q & A Activity 1.0	Provides information about your community groups' question and answer activities.	✅	
Network Login History 5.0	Provides detailed metrics about the external users (partners or customers) logging into a community. This custom report type doesn't include logins for internal users accessing the community from their internal Salesforce org. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Lookup Network > Network Members > Login History from the Network Login History 5.0 custom report type to get a detailed report of usage)	✅	✅
Network Member Activity 1.0	Provides high-level metrics about community member adoption and engagement.	✅	
Network Members 3.0	Provides information on community members. The Network Members entity exposes all user record fields.	✅	✅
Network Membership Daily Metrics 2.0	Provides the number of internal and external members.	✅	✅
Network Frozen Members 2.0	Provides information about all your community's frozen members. Reports based on this custom report type get data from system jobs.	✅	
Network Moderation Flagged Direct Messages 1.0	Provides information about all of your community's direct messages which have been flagged by the users.	✅	
Network Moderation Flagged Comments 2.0	Provides information about all your community's feed comments which are flagged by the users.	✅	
Network Moderation Flagged Files 2.0	Provides information about all your community's files which are flagged by the users.	✅	
Network Moderation Flagged Messages 2.0	Provides information about all your community's Chatter messages which are flagged by the users.	✅	

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Note: This report has been enhanced for this version			
Network Moderation Flagged Posts 2.0	Provides information about all your community's feed posts which are flagged by the users.	✓	
Network Posts Pending Approval 2.0	Provides information about all your community's feeds posts which are pending approval.	✓	
Network Private Messages 3.0	Provides information on private messages sent in a community, including who sent them.	✓	
Network Public Usage Daily Metrics 2.0	Provides information on daily public page views by guest users. Reports based on this custom report type get data from system jobs. Guest users are assigned a random identifier that is used to generate the daily report and then discarded.	✓	✓
Network Topic Assignments 3.0	Provides information on topic assignments in a community. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	✓	
Network Topics 3.0	Provides information on trending topics, topic assignments, topic assigners, and more.	✓	
Network Unique Contributor Daily Metrics 2.0	Provides information on daily unique visitors across groups and user profiles, by member type (internal, customer, and partner). Reports based on this custom report type get data from system jobs.	✓	
Network User Activity 3.0	Provides information on user profile activity (such as posts, comments, and likes) and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	✓	
Network User Licenses 1.0	Provides information about community user license usage. The Usage Entitlement is a license bucket that includes Customer Community Logins, Customer Community Members, Partner Community Logins, and Partner Community Members (tracking both community and portal licenses assigned to the community). The Customer Community Members and Partner Community Members bucket fields track name-based users per community. The Customer Community Logins and Partner Community Logins bucket fields track login-based users across communities.	✓	✓

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
	The Amount Used field indicates how many licenses were used that week. The Amount Allowed field indicates how many licenses the customer purchased (either named-users or logins per month).		
Network User Participation Daily Metrics	Provides information about whether a user is a contributor or an observer in a community. Reports based on this custom report type get data from system jobs.	✅	
Related Questions CTR 1.0	Provides information about the number of times a user clicks on the Related Questions widget compared to the number of times it is shown.		

The Power of Customization

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize the Date Filter

For reports that specify a date filter, you can customize these reports to provide any date range.

Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.

Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org.

Add More Filter Logic

You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

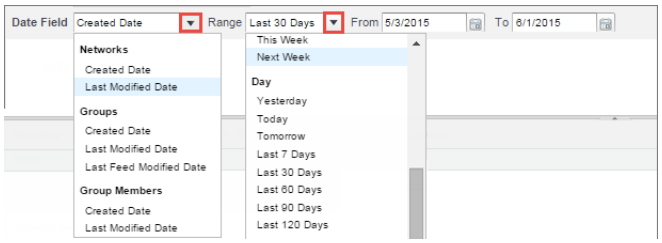
Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

Customize the Date Filter

For reports that specify a date filter, you can customize these reports to provide any date range.

You can also change the **Date Field** to report on other objects in the report. Try customizing the G- # Group Members Added L30D report.



EDITIONS

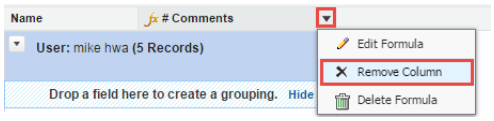
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For more information, see Filter Report Data, Notes about Filtering on Types of Fields and Values, and Relative Date Filter Reference.

Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For more information, see Report Fields in Salesforce Help.

Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org.

For example, if a report is grouped by department, you can group by country instead. Try customizing the CH D - Group Membership By Dept report.

1. In the Fields pane, drag the new field you want to group by into the Preview pane area that says **Drop a field here to create a grouping**.
2. In the Preview pane, click the old grouping field and select **Remove Group**.
3. On your new grouping field, click the dropdown and select **Sort Group By** and select the relevant data you want to sort by.

For more information, see Group Your Report Data.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

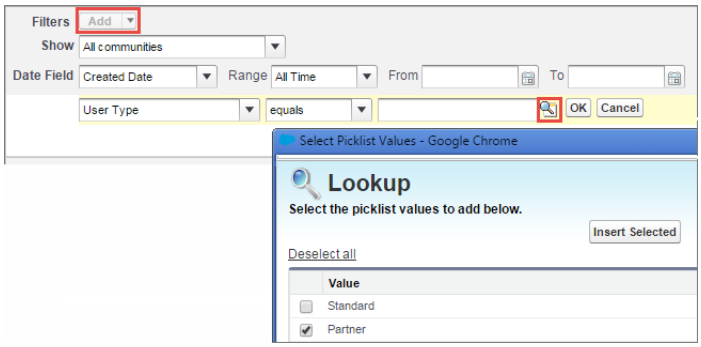
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Add More Filter Logic

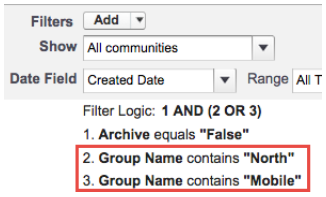
You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

To add a filter, click **Add** and then specify the field.

Adding a User Type filter:



Added Group filter:



For more information, see Add Filter Logic and Filter Your Report Data in Salesforce Help.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

This type of customization is useful if you want to expose more user fields or custom fields that you've added to contacts. See the Custom Report Type Descriptions section for more information.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community Case Deflection Metrics Dashboard and Reports

Install the Salesforce Case Deflection Reporting Package to see how well the Contact Support Form and Case Deflection components actually deflect cases from being created. Using the Community Case Deflection Metrics dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.

During installation, dashboard and report folders are automatically installed in your internal org. If you have no previous dashboards mapped in Community Management or Community Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management or Community Workspaces, community-specific data is displayed.

With this dashboard, you can answer:

- How many confirmed, potential, and unsuccessful deflections are in my community?
- Which articles are the most helpful for deflecting cases?
- Which discussions are the most helpful for deflecting cases?

Important: This dashboard and its reports are *only* available in orgs using Salesforce Knowledge.

EDITIONS

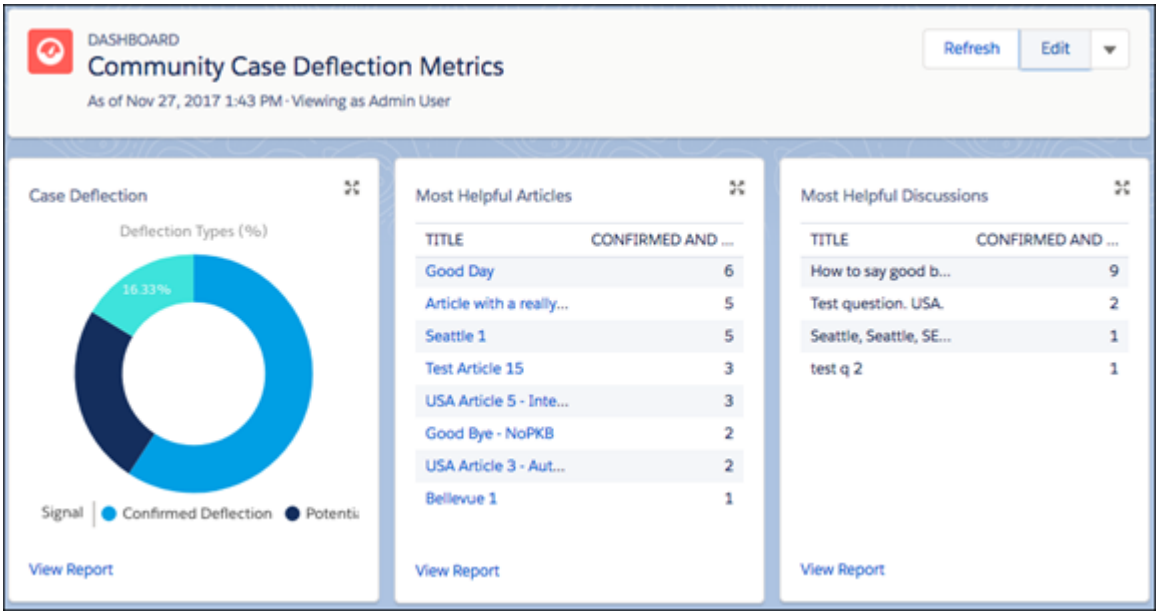
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages



Report Name	Description	Custom Report Type	On Dashboard?
Overall Case Deflection	Shows if a case was deflected, potentially deflected, or not deflected.	Community Case Deflection Metrics	✅
Most Helpful Articles	These articles have the most confirmed and potential deflections.	Community Case Deflection Metrics	✅
Most Helpful Discussions	These discussions have the most confirmed and potential deflections.	Community Case Deflection Metrics	✅

Report Name	Description	Custom Report Type	On Dashboard?
Articles with the Most Deflections	Articles with the most confirmed deflections.	Community Case Deflection Metrics	✅
Articles with Potential Deflections	Articles with the most potential deflections.	Community Case Deflection Metrics	✅
Articles with Unsuccessful Deflections	Articles that didn't deflect any cases.	Community Case Deflection Metrics	✅
Discussions with the Most Deflections	Discussions with the most confirmed deflections.	Community Case Deflection Metrics	✅
Discussions with Potential Deflections	Discussions with the most potential deflections.	Community Case Deflection Metrics	✅
Discussions with Unsuccessful Deflections	Discussions that didn't deflect any cases.	Community Case Deflection Metrics	✅

Unsupported Components

The following list identifies which reports are not supported in this release. If you are installing the package for the first time or are installing the package from scratch, you don't need to worry about these as they will not show up. If you are updating, be sure to remove these components.

Tip: The symbol ✦ identifies all the newly unsupported components in this release.

The following components are unsupported:

From the **Communities Dashboards**[5] folder:

- Activity 2.0 (and previous versions)
- Content 3.0 (and previous versions)
- Communities Search Dashboard (replaced with version 2.0)
- Groups 2.0 (and previous versions)
- Licenses 5.0 (and previous versions)
- Members 2.0 (and previous versions)
- Moderation 2.0 (and previous versions)
- Overview 2.0 (and previous versions)
- Q&A 2.0 (and previous versions)
- Self-Service 2.0 (and previous versions)
- Topics 3.0 (and previous versions)

From the **Communities Reports**[6] folder:

- A - Comments L30D
- A - Posts L30D

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

[5] You might have an older version of this folder called Communities Dashboards 2.0.
[6] You might have an older version of this folder called Communities Reports 2.0.

- A - Posts With Most Comments L30D
- A - Posts With Most Likes L30D
- A - Unique Daily Contributors L30D
- C - File Engagement Monthly
- C - File Uploads & Downloads Monthly
- C - Top 10 Files By Contributions
- C - Top 10 Files By Downloads
- C - Top 10 Files By Likes
- C - Top 10 Files By Shares
- C - Top 10 Users - Most File Contrib
- C - Top 10 Users - Most File Uploads L30
- C - Top 10 Users - Most Liked Files
- Daily Search Frequency (Last 30 Days)
- G - Least Active Groups L30D
- G - Most Active Groups L30D
- G - Top 10 Group Commenters
- G - Top 10 Group Posters
- Group Comments (Last 30 Days Trend)
- Group Posts (Last 30 Days Trend)
- L - # Cust Comm All Allocated Lic
- L - # Cust Comm Logins All Alloct (replaced with 2.0 version)
- L - # Cust Comm Plus All Allocated Lic
- L - # Cust Comm Plus Logins All Alloct (replaced with 2.0 version)
- L - # Partner Comm All Allocated Lic
- L - # Partner Comm Logins All Alloct (replaced with 2.0 version)
- L - CC Login-based - Monthly Logins (replaced with 2.0 version)
- L - CC User-based - Monthly Logins (replaced with 2.0 version)
- L - CCP Login-based - Monthly Logins (replaced with 2.0 version)
- L - CCP User-based - Monthly Logins (replaced with 2.0 version)
- L - Cust Comm Login Monthly Usage (replaced with 2.0 version)
- L - Cust Comm Login Monthly Trend
- L - Cust Comm Member Usage
- L - Cust Comm Plus Member Usage
- L - Cust Comm Plus Login Monthly Trend (replaced with 2.0 version)
- L - Cust Comm Plus Login Monthly Usage (replaced with 2.0 version)
- L - PC Login-based - Monthly Logins (replaced with 2.0 version)
- L - Partner Comm Login Monthly Trend (replaced with 2.0 version)
- L - Partner Comm Login Monthly Usage(replaced with 2.0 version)
- L - Partner Comm Member Usage
- Logins Used by Customer Licenses

- Logins Used by Partner Licenses
- M - Top 10 Members By Login
- M - Top 10 New Members By Logins
- Member-based Customer Licenses Used
- Member-based Partner Licenses Used
- Member Logins (Last 30 Days Trend)
- Member Logins (Last 30 Days)
- Member Logins (Last 90 Days Trend)
- Members (Last 30 Days Trend)
- Members (Last 90 Days Trend)[7]
- MO - Top 10 Flagged Items
- MO - Top 10 Flagged Members
- MO - Top 10 Members Who Flag Items
- MO - Top 10 Moderators
- New Members (Last 30 Days Trend)
- O - Top 10 Group Contributors
- Q - Answers in Groups L30D
- Q - Best Answers in Groups L30D
- Q - Questions in Groups L30D
- Q - Top Answered Questions Groups L30D
- Q - Unanswered Questions in Groups L30D
- S - Answers in User Profiles L30D
- S - Best Answers in User Profiles L30D
- S - Daily Page Views L30D
- S - Daily Unique Visitors L30D
- S - Questions in User Profiles L30D
- S - Top Answered Qs in User Profile L30D
- S - Unanswered Qs in User Profiles L30D
- T - Top 10 New Trending Topics L30D
- T - Topics Assigned Daily
- T - Topics Assigned Monthly
- T - Topics Created Monthly

From the **Community Management Home Dashboards** folder—*all* dashboards; you can remove this folder if you installed the package with Chatter[8]

From the **Community Management Home Reports** folder:

[7] If you still want to use the Members (Last 30 Days Trend) and Members (Last 90 Days Trend) reports, you can re-create them. Keep in mind, to get the Member Count field, you need to create a custom report type with Networks as the primary object and Network Members as the secondary object. Then create a report using this custom report type and add the Member: fullname field. This report returns a snapshot of data, not trending data.

[8] In the package with Chatter, all dashboards in this folder are no longer supported. In the package without Chatter, this folder and its dashboards still remain.

- Contributions - Daily Trend
- Logins - Daily Trend[9]
- Logins - Monthly Trend[10]
- New Members - Daily Trend[11]
- Page Views - Daily Trend
- Q&A - Daily Trend

From the folder **Insights Adoption** (this entire folder and its contents are unsupported):

- Active Members By Comments
- Active Members By Comments Received
- Active Members By Likes Received
- Active Members By Posts
- Contributors Inactive For 7+ Days (replaced with 2.0 version)
- Influencers Inactive For 7+ Days (replaced with 2.0 version)
- New Members By Comments
- New Members By Comments Received
- New Members By Date Joined
- New Members By Likes Received
- New Members By Posts
- Recent Contributors (replaced with 2.0 version)
- Recent Logins

From the folder **Insights Activity** (this entire folder and its contents are unsupported):

- Discussions By Comments
- Discussions By Likes
- New Discussions (replaced with 2.0 version)
- New Discussions By Comments
- New Discussions By Likes
- New Discussions With No Comments
- New Members' Comments (replaced with 2.0 version)
- New Members' Posts (replaced with 2.0 version)

From the folder **Insights Files** (this entire folder and its contents are unsupported):

- Files By Comments
- Files By Downloads
- Files By Likes
- Files By Posts
- New Image Files (replaced with 2.0 version)
- New Office Files (replaced with 3.0 version)

[9] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.
[10] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.
[11] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

- New Office Files (replaced with 2.0 version)
- New Video Files (replaced with 2.0 version)
- Recent Files (All) (replaced with 2.0 version)
- Recent Files By Comments
- Recent Files By Downloads
- Recent Files By Likes
- Recent Files By Posts

From the folder **Insights Groups** (this entire folder and its contents are unsupported):

- Groups Recently Archived (replaced with 2.0 version)
- Groups Soon To Be Archived (replaced with 2.0 version)
- Groups With Deactivated Owners (replaced with 2.0 version)
- Groups With Inactive Owners (replaced with 2.0 version)
- New Groups By Dates
- New Groups By Members

From the folder Insights Moderation[12]

- Content Blocked By Rule
- Content Flagged By Rule
- Content Replaced By Rule
- Discussions Flagged (All)
- Files Flagged By Members
- Flagged Comments 2.0 (replaced by 3.0 version)
- Flagged Direct Messages 1.0 (replaced by 2.0 version)
- Flagged Files 2.0 (replaced by 3.0 version)
- Flagged Messages (replaced by Flagged Direct Messages 1.0 and Flagged Private Messages 1.0 reports)
- Flagged Posts 2.0 (replaced by 3.0 version)
- Frozen Members (replaced by 2.0 version)
- Messages Flagged By Members
- Moderation Audit 2.0[13]
- Moderation Audit for New Members
- Posts Pending Approval (replaced by 2.0 version)

From the folder **Insights Self-Service**[14]:

- Best Answers (replaced with 2.0 version)
- Best Answers From External Members (replaced with 2.0 version)
- Questions (replaced with 2.0 version)
- Questions From New Members (replaced with 2.0 version)
- Questions Most Liked

[12] This entire folder and its contents are unsupported.
[13] The contents of this folder were moved to the Moderation Audit Trail folder.
[14] This entire folder and its contents are unsupported.

- Questions With Answers From New Members (replaced with 3.0 version)
- Questions With Answers From New Members (replaced with 2.0 version)
- Questions With Most Answers
- Questions With New Answers (replaced with 2.0 version)
- Questions Without A Best Answer (replaced with 2.0 version)
- Questions Without An Employee Answer
- Questions Without Answers (replaced with 2.0 version)

From the folder **Insights Topics**[15] :

- Topics Added (replaced with 2.0 version)
- Topics Assigned (replaced with 2.0 version)
- Topics Most Talked About (replaced with 2.0 version)

From the **Misc Communities Reports** folder:

- Questions Escalated - Daily Trend

Service Community Scorecard

Track member use, service metrics, and search activity using the Service Community Scorecard.

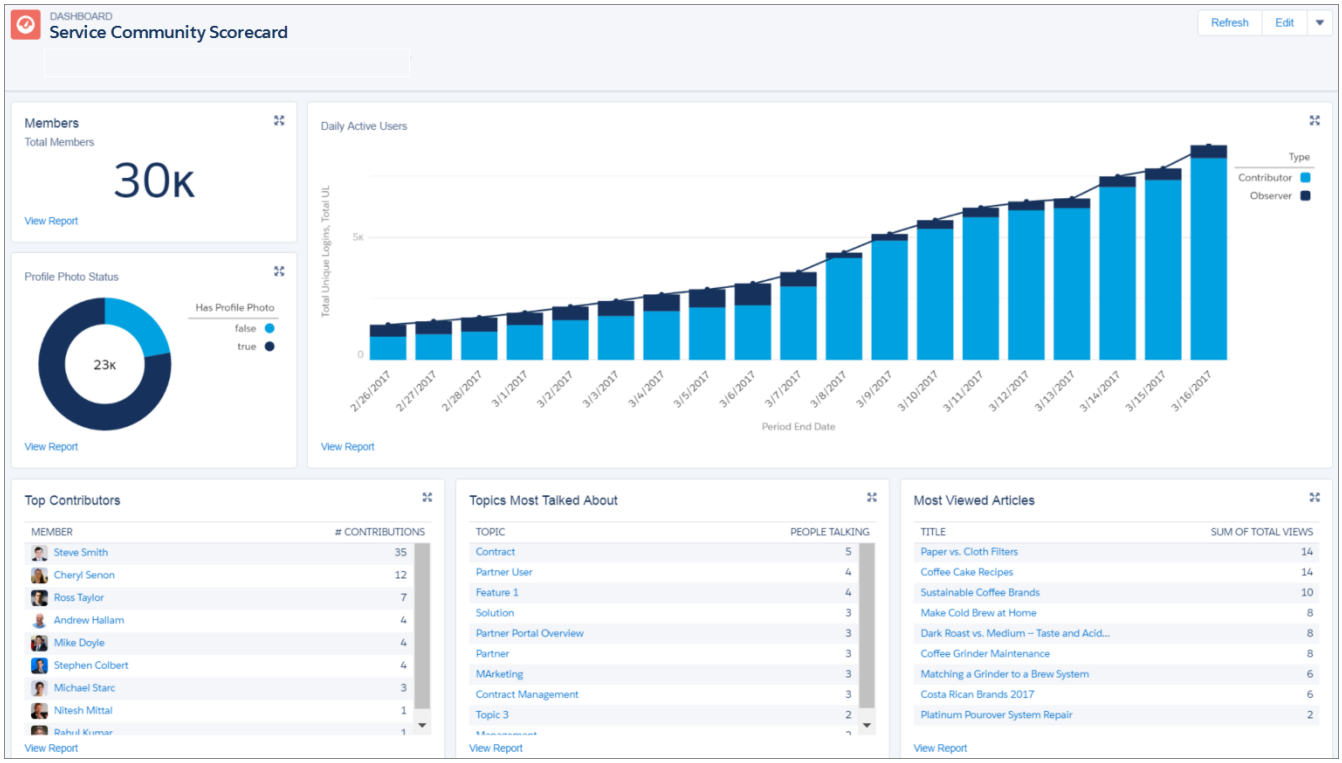
Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place. To access the Service Community Scorecard, go to **Dashboards** > **Home** in Community Management or Community Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

[15] This entire folder and its contents are unsupported.



The Community Service Scorecard is available on the AppExchange through the Summer '17 Community Management Package. If it's your first time installing the package, the Service Community Scorecard automatically shows up in **Dashboard** > **Home** in Community Management or Community Workspaces. If you've installed a previous version of the package, you need to manually map the Home dashboard to the Service Community Scorecard from **Dashboards** > **Settings**. Click the down arrow to the right of the dashboard mapped to Home and select the Service Community Scorecard.

Perhaps your employee or partner community tracks different information? You can customize and rename your scorecard. Go to your internal org and click the **Dashboard** tab. Search for Service Community Scorecard and click **Edit** to add or remove reports or change the name of your scorecard.

Note: The "Manage Dashboards" and "View All Data" permissions are required to edit this dashboard.

Visit the AppExchange to install or upgrade your Community Management Package. The Summer '17 version of the package is available shortly after the release.

Set Up Report Management for External Users—Create and Edit Reports

Community partner and customer users can create and edit reports in their own personal folder or in a privately shared folder if they have sufficient permissions. You can grant partner and customer users permissions to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

Important:

- If your organization existed before the Summer '13 release, you must first turn on enhanced sharing for reports and dashboards before granting external users permissions. See Analytics Folder Sharing.
- To create, customize, and delete reports, external users must use the Report Builder tool.
- You can't create or edit reports in Lightning communities.

Data visibility is based on two main things: the user role the partner or customer belongs to and your organization's sharing rules. Your organization's field-level security is respected, meaning that if a field is not visible for external users, a partner or customer user won't see it in Report Builder.

1. To allow external users to create and edit reports, turn on the "Create and Customize Reports," "Report Builder," and "Edit My Reports" permissions through custom profiles or permission sets. If you want external users to export report data, also assign them "Export Reports" permission.

   In Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** or **Profiles**. Assign the following permissions:

External User Permissions Needed to Create and Edit Reports	
To create, customize, and delete reports in a personal folder:	"Create and Customize Reports" AND "Report Builder"
To create, customize and delete their own reports in a privately shared folder with Viewer access:	"Edit My Reports" AND "Report Builder"
To export report data:	"Export Reports"

   You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner.

   Note:

   - These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
   - External users with legacy portal licenses can create and edit reports in communities, but not in portals.

2. If you want your external users to create or edit reports in a privately shared folder, grant them "Viewer" access on the folder.

   On the **Reports** tab in the Folders view, click next to the folder you want to share, then select **Share**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

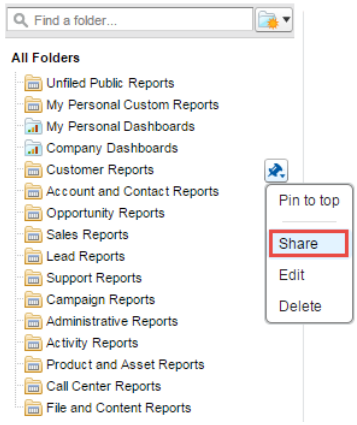
USER PERMISSIONS

To create permission sets or enable custom permissions in profiles:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To share a report folder with external users:
- Manager folder access or Manage Reports in Public Folders

Note: Partner and customer users can't create, edit, or view reports in the Unfiled Public Reports folder.



Depending on what objects, fields, and categories your external users have access to, they might see custom report types in the UI when creating a report. Custom report types are visible if a user has read access on any fields or objects included in the custom report type.

SEE ALSO:

Share a Report or Dashboard Folder in Salesforce Classic

Compare Access Levels for Report and Dashboard Folders

Track Community Activity with Custom Reports

Create custom reports to track usage, moderation, and other community activity.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

To monitor the health of your community, you can create custom report types and then create a report using that custom report type. If you want your community managers to see your report in Community Management, you can create or edit a dashboard to include your report and then map the updated dashboard in Community Management. To change the mapping of a dashboard, click **Dashboards** > **Settings**.

Note: Only reports that are based on the Networks object show community-specific information on the Community Management page. Using reports based on the Networks object, means you can create one custom report and use it across all your communities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use the following table to get started with reporting for communities:

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Chatter Usage	Networks > Chatter Messages	Create reports on the private message activity in your community.[1]
Chatter Usage	Networks > Feed Revisions	Create reports on posts and comments that your members have edited.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Chatter Usage	Networks > Groups	Create reports on the groups in your community.
Moderation	Networks > Network Audits	Create reports on all moderation activity and history in your community. To report on moderation activity in private Chatter messages, filter the report by `Audited Object Type` (on the Network Audits object) to equal `Chatter Message`.
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on members in your community who either flagged items or moderated a flagged item.
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the members in your community whose items were flagged, blocked, or replaced.
Moderation	Networks > Network Members > User Login	Create reports on frozen members in your community.
Moderation	Networks > Network Moderations > Content Documents Networks > Network Moderations > Feed Posts Networks > Network Moderations > Feed Comments Networks > Network Moderations > Private Messages	Create reports on content that is currently flagged in your community. These reports allow you to see the actual contents of the flagged item. For example, you can see the contents of a flagged private message to easily determine if the message is spam.
Moderation	Networks > Unpublished Feed Entities > Feed Posts	Create report on posts that are pending review and approval.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public community page views and unique visitors.
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage in your community.
Topic Activity	Networks > Topics	Create reports on the topic activity in your community.
Topic Activity	Networks > Topic Assignments	Create reports on the topic assignments in your community.
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.
User Activity	Networks > Network Members > Login History	Create reports on community login activity. This report only includes direct logins to the community. If a user logs in to an org and then switches to a community, their login activity isn't included.
User Activity	Networks > Network Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
User Activity	Networks > Network Unique Contributor Daily Metrics	Create reports on the unique daily contributors in your community. A member is counted as a contributor if they posted or commented on a group or a user profile.
User Profile Photos	Networks > Network Members	To report on user profiles with or without photos, filter the report by `Has Profile Photo` (on the Network Members object) to equal `True` or `False`.

[1]To report on Chatter Messages, you must have the "Moderate Communities Chatter Messages" permission.

Note: You can create reports based on other objects and expose them in Community Management or Community Workspaces. Keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

SEE ALSO:

Report on Communities with the AppExchange Packages for Community Management

Create a Custom Report Type

Communities Report and Dashboard Considerations

If the Reports and Dashboards tabs are exposed in the community, external users can access reports and dashboards.

Important:

- To allow external users to create and edit reports, your org must use the enhanced sharing model. See Analytics Folder Sharing.
- You can't create or edit reports in Lightning communities.

You can give permission to create and edit reports to communities users with the following licenses:

Community licenses

- Customer Community Plus
- Customer Community Plus Login
- Partner Community
- Partner Community Login
- Lightning External Apps Plus

Portal licenses

- Customer Portal Manager
- Customer Portal Manager Custom (for Enterprise Administration users)
- Customer Portal Manager Standard
- Customer Portal Manager User
- Gold Partner

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Ideas Only Portal
- Overage Customer Portal Manager Custom
- Overage Customer Portal Manager Standard
- Partner
- Silver Partner ("Export Reports" permission isn't available to this license)

Note:

- These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
- External users with legacy portal licenses can create and edit reports in communities, but not in portals.

After you grant permission to your external users, they still can't:

- Schedule reports or dashboards for email and refresh at a specific date and time

  Note: The refresh button is not available in Lightning communities accessed through mobile devices.

- Create, edit, or view reports in the Unfiled Public Reports folder

All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

All role-based external users can be selected for the "Run as specified user" option.

Allow External Users to Report on Tasks and Events

Take the following steps to give access to your portal and community users to report on tasks and events.

1. From **Salesforce Setup**, access the **Object Manager**.
2. Access Tasks or Events, depending on which objects you need to give access to.
3. Click **Fields & Relationships** > *Public* > **Set Field-Level Security**. Check all the profiles you'd like to have access to this field and click **Save**.
4. Click **Page Layout** and add the Public field to your Task or Event object's page layout.
5. Click **Save**.

Note:

- These steps allow you to make the Public field visible to external users. However, in order for tasks and events to show up in reports, the Public field must be checked when the task or event is created. You can set up a flow to automatically check all new and edited tasks and events and being public. To include previously created tasks and events in reports, you must manually select the **Public** field.
- You can't create or edit reports in Lightning communities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Google Analytics™ for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within a community.

Integrate Google Analytics with your self-service community to track search activity such as article views, page views, and object views. You can also track case deflection from the "Contact Support" page and get insights into the health of your self-service offerings.

USER PERMISSIONS

To create, customize, or publish a community:
- Create and Set Up Communities AND View Setup and Configuration

IN THIS SECTION:

Google Analytics™ for Salesforce Communities
Does your company use Google Analytics to track site analytics? Now you can use it to track search activity in self-service communities and track deflection from cases. Using Google Analytics, you can dive deeply into your community's search behavior and pull that information into meaningful reports.

Enable Google Analytics™ for Your Community
Let Google Analytics access your Salesforce data to track community user types, user IDs, page views on Salesforce objects, and customer search activity.

Set Up Google Analytics™ for Salesforce Communities
Set up Google Analytics to correctly capture usage and page view metrics for Salesforce communities.

Install Google Analytics™ for Salesforce Communities
Install preconfigured reports that integrate Salesforce community data with Google Analytics.

Google Analytics™ for Salesforce Communities Report Descriptions
The Google Analytics for Salesforce Communities package contains five reports that track new and returning visitors, page views, and search activity. You can also track case deflection from the Contact Support page and get insights into the health of your self-service offerings.

Google Analytics™ for Salesforce Communities Dashboard
The Google Analytics for Salesforce Communities package contains three dashboards that visually display the key metrics tracked in the package.

Tracking User Flow
The User Flow tracks how different types of users are interacting with the community.

Google Analytics™ for Salesforce Communities

Does your company use Google Analytics to track site analytics? Now you can use it to track search activity in self-service communities and track deflection from cases. Using Google Analytics, you can dive deeply into your community's search behavior and pull that information into meaningful reports.

Note: This feature transfers customer data to a third party, Google Analytics.

Google Analytics integrates with your self-service community to track user types, user IDs, pageviews on Salesforce objects, and customer search activity. We've also made it possible to turn on Google's IP Anonymization, if your policies or needs require it.

The Package includes:

- Search dimensions that can be rearranged for different drilldown configurations.
- Options for tracking user flow

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

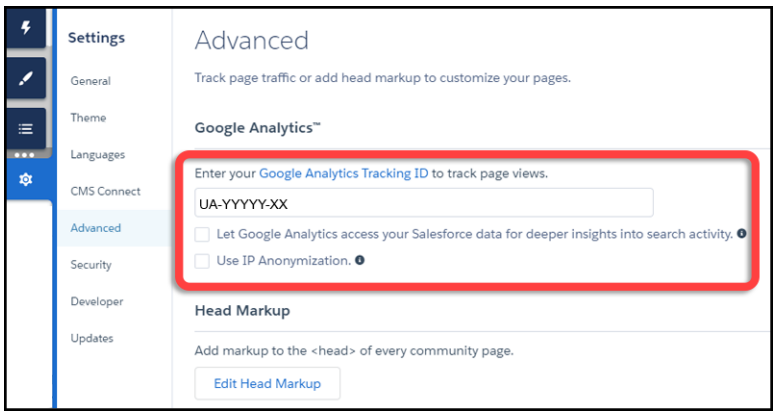
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Reports that can be customized at multiple levels
- Preconfigured reports:
  - Contact Support Page Activity
  - Page Views by New and Returning Users
  - Page Views by Salesforce Object
  - Page Views by User Type
  - Search Activity
- Preconfigured dashboards:
  - Contact Support Activity
  - Search Activity
  - Page Views

Enable Google Analytics™ for Your Community

Let Google Analytics access your Salesforce data to track community user types, user IDs, page views on Salesforce objects, and customer search activity.

1. First, let Google Analytics access your data to collect page views. Go to **Settings** > **Advanced** in Community Builder and enter your Google Analytics ID. For more information about the Google Analytics ID, check the Google Analytics documentation.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize or publish a community
- Create and Set Up Communities

Note: After entering your ID, we automatically add the following sites to your org's CSP Trusted Sites to ensure that both Analytics and the AdWords features can function:

- `https://www.google-analytics.com`
- `https://stats.g.doubleclick.net`

If you have already had a Tracking ID entered, these sites are added automatically on moving to Winter '19.

2. Then optionally select the additional supporting Google features depending on your needs and policies.
   - **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity within your community.

- **Use IP Anonymization** to enable the masking of IP addresses on the Google server side to help with privacy compliance or concerns.

3. To enable the service, publish the community.

When you publish your community to enable the service, your community's search data streams directly to Google Analytics and appears in your Google Analytics reports.

SEE ALSO:

Content Security Policy in Lightning Communities

Set Up Google Analytics™ for Salesforce Communities

Set up Google Analytics to correctly capture usage and page view metrics for Salesforce communities.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

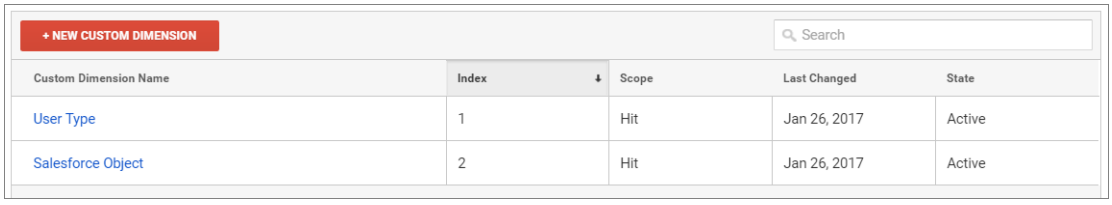
USER PERMISSIONS

To customize or publish a community
- Create and Set Up Communities

Enable Google Analytics™ for your community to integrate your Salesforce data with Google Analytics before you set up Google Analytics.

1. Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information. From your Google Analytics account, go to **Admin** > **Property** > **Custom Definitions** > **Custom Dimensions**. Click **+New Custom Dimension**.
   a. For the first index, enter the Name: `User Type` and select **Hit** for the scope.
   b. For the second index, enter the Name `Salesforce Object` and select **Hit** for the scope.
2. Create a User-ID view. With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content. To create a User-ID view, go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
   a. For the User-ID view, enter the Name: `User Explorer`.

Example: Custom Dimensions



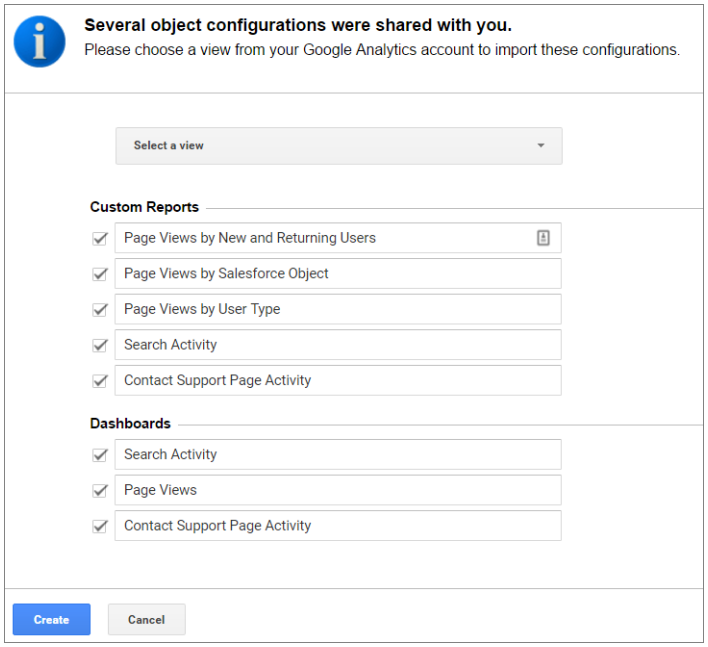
After you set up Google Analytics to integrate with your Salesforce community, you can create your own reports or install the preconfigured Google Analytics for Salesforce Communities package on page 710.

Install Google Analytics™ for Salesforce Communities

Install preconfigured reports that integrate Salesforce community data with Google Analytics.

1. Make sure you've signed in to your Google Analytics account.
2. Click here or search for Google Analytics for Salesforce Communities in the Google Analytics Solutions Gallery.
3. Click the dropdown next to **Select a View** and select **User Explorer** under the account that you are adding the package to.
4. Click **Create**.
5. View your reports from **Customization** > **Custom Reports** in your Google Analytics account.

Example:



Tip: You can drill down into the event type you are interested in viewing from each report. You can also create your own reports in Google Analytics and add them to your User View.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

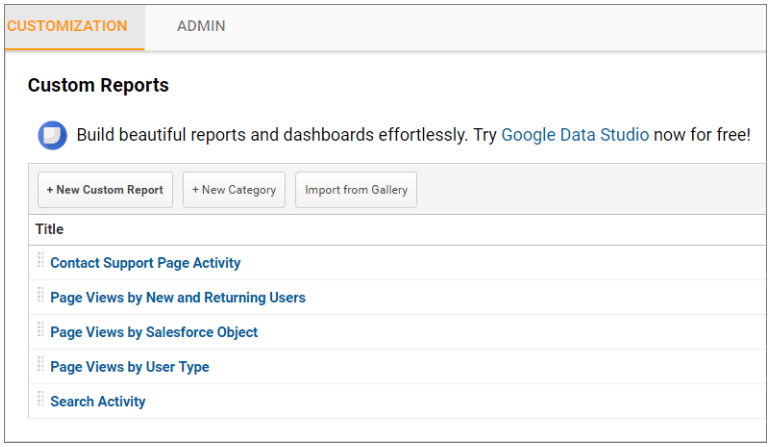
To customize or publish a community

- Create and Set Up Communities

Google Analytics™ for Salesforce Communities Report Descriptions

The Google Analytics for Salesforce Communities package contains five reports that track new and returning visitors, page views, and search activity. You can also track case deflection from the Contact Support page and get insights into the health of your self-service offerings.

When you access Google Analytics, your Google Analytics for Salesforce Communities reports are under **Customization** > **Custom Reports**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Contact Support Page Activity Report

The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

Page Views by New and Returning Users Report

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed.

Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page.

Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

Contact Support Page Activity Report

The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

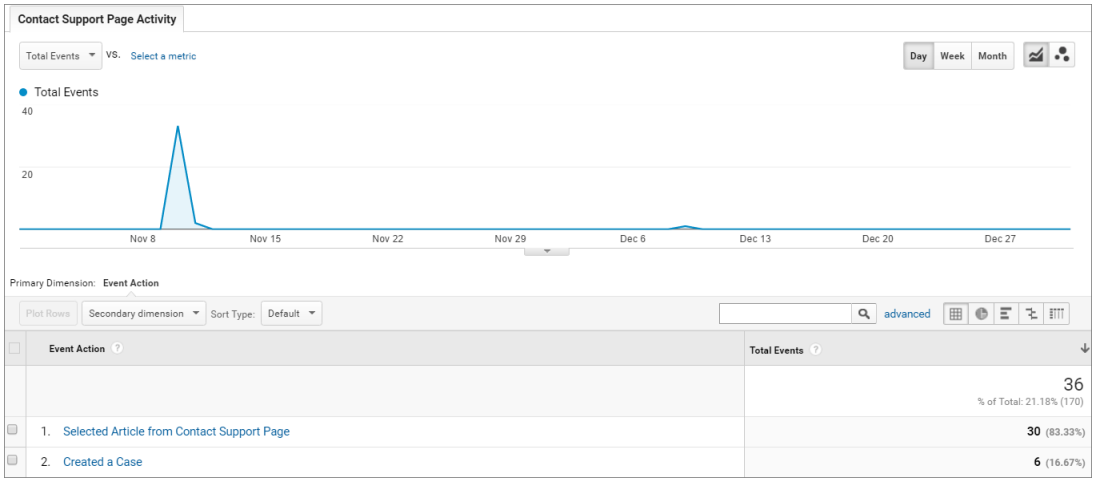
When a customer goes to the Contact Support page, they typically have a specific issue that they need help with right away. The customer has the option of entering their question into a search box and either selecting a recommended article or opening up a customer support case. The Contact Support Page Activity report tracks which cases are created and how many times a customer selected an article instead. You can drill into the report to:

- Track how many cases have been deflected from customer support
- See which articles were clicked the most
- See which subjects lead to a new support case

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Page Views by New and Returning Users Report

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

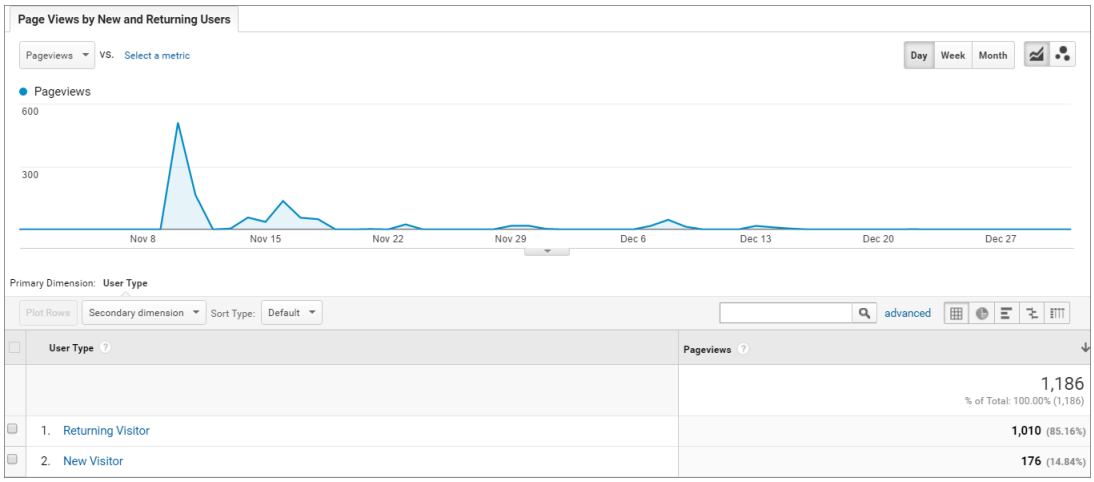
You can drill into the report to:

- Track how active different types of user are within your community
- See which pages are being viewed
- Get detailed information about the pages, such as page title and URL

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed.

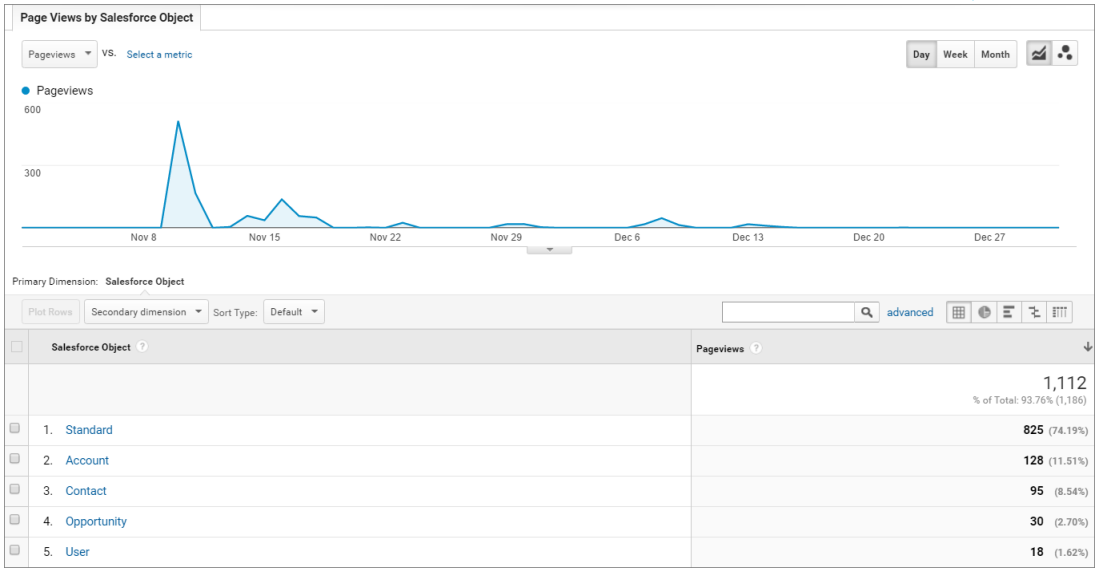
You can drill into the report to:

- Track how often an object page has been viewed
- Get more information about the page, such as page title and URL

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Note: Only overridden pages for objects are captured as different objects. Standard pages like the Home page and Contact Support Page are captured in the "Standard" Bucket.

Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page.

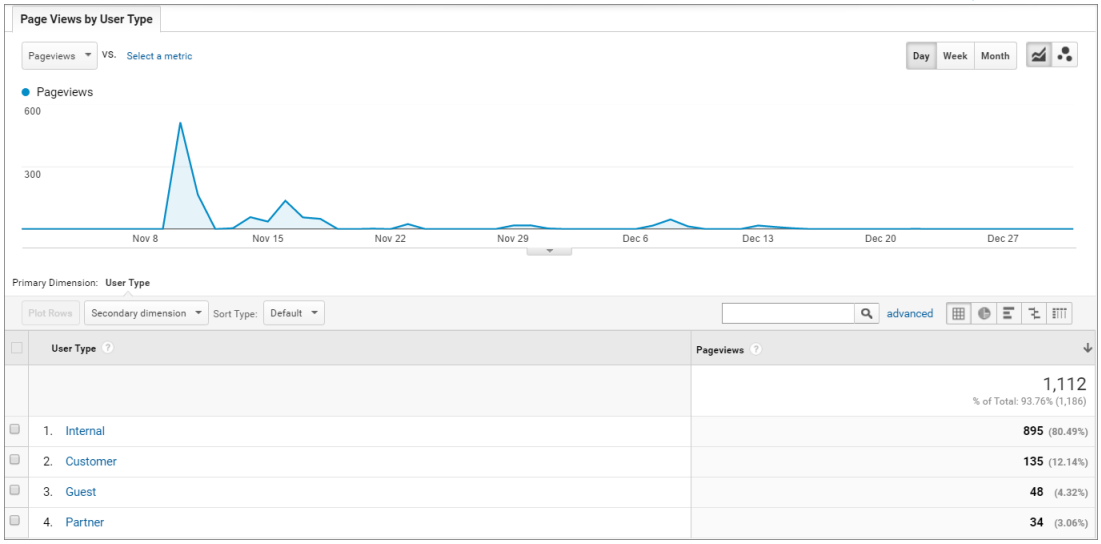
You can drill into the report to:

- Select the user type you want to report on
- Get more information about the page, such as page title and URL

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

When a customer enters a term in the search box, recommended articles and similar questions are displayed to them as they type. From there, they can click an article or related question. Customers have the option of searching the entire community or narrowing their search down to a particular topic. They also have the option of asking the community a new question.

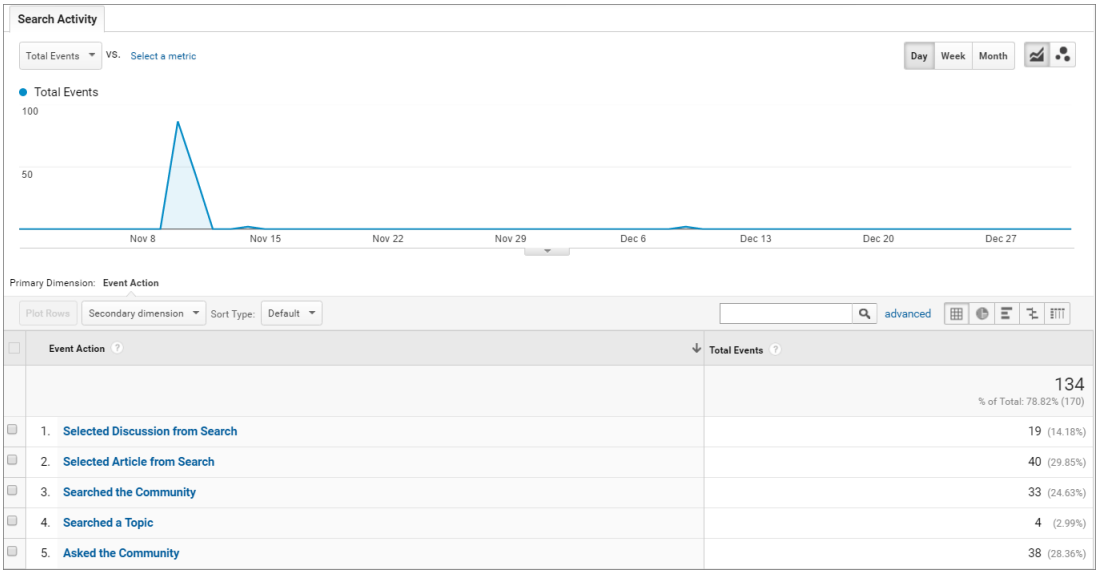
The Search Activity report tracks which action the customer takes from the page that they begin their search on. You can drill into the report to:

- Identify which search terms are being used with each action
- Track how many times a search term is being used

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Google Analytics™ for Salesforce Communities Dashboard

The Google Analytics for Salesforce Communities package contains three dashboards that visually display the key metrics tracked in the package.

When you access Google Analytics, your Google Analytics for Salesforce Communities dashboards are under **Reporting** > **Dashboards** > **Private**. The Google Analytics for Salesforce Communities package contains three dashboards:

Note: The names of the dashboards can be customized. All other labels are not customizable.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Search Activity Dashboard
The Search Activity dashboard represents the search activity within the community.

Contact Support Page Activity Dashboard
The Contact Support Page Activity dashboard represents the activity on the Contact Support page.

Page Views Dashboard
The Page Views dashboard represents the page views in your community.

Search Activity Dashboard

The Search Activity dashboard represents the search activity within the community.

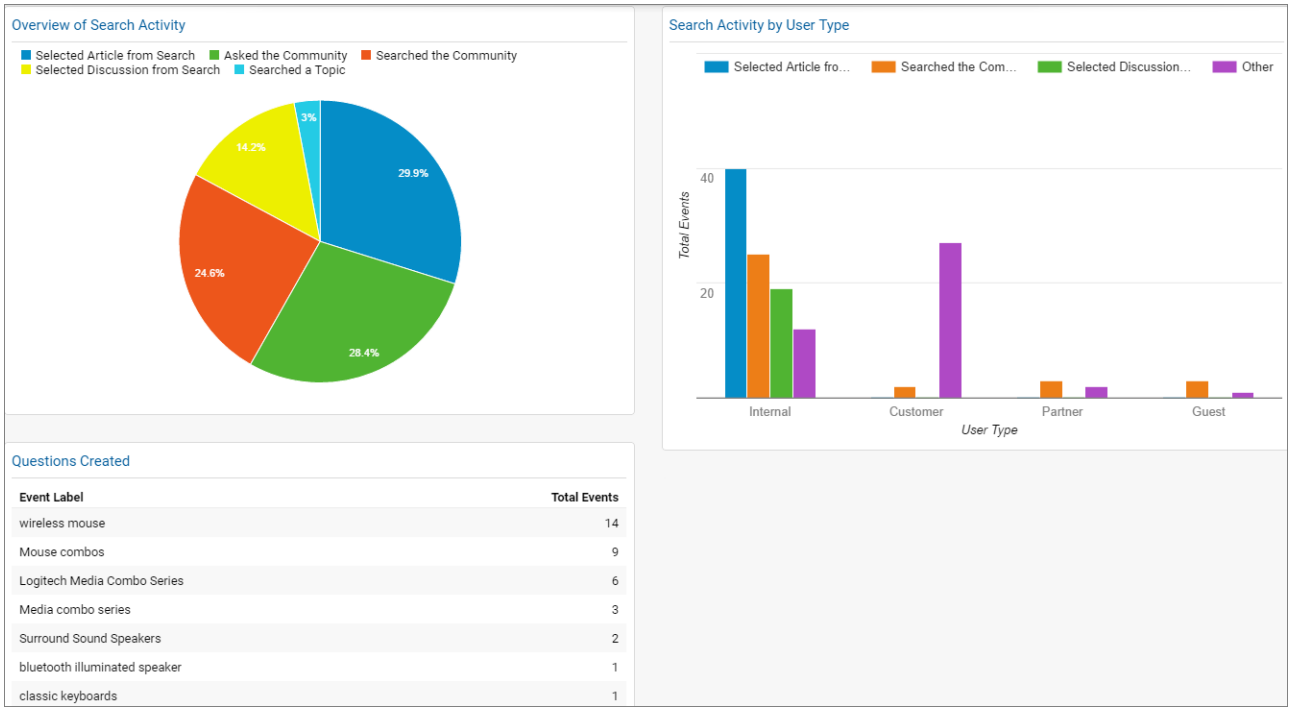
You can get the following information from this dashboard:

- Which actions were taken most frequently
- How Internal, Partner, Customer, and Guest users searched the community
- A list of search terms used to create questions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Contact Support Page Activity Dashboard

The Contact Support Page Activity dashboard represents the activity on the Contact Support page.

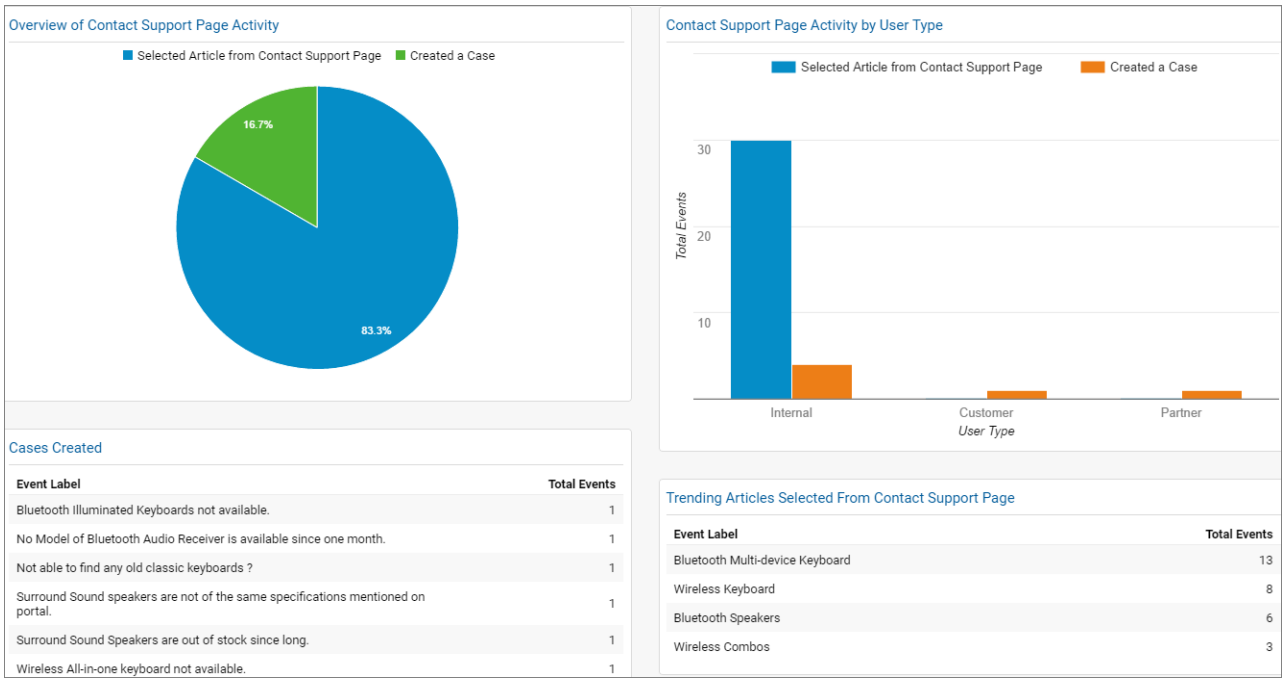
You can get the following information from this dashboard:

- How frequently a user selected an article or created a case from the Contact Support page
- Which types of users selected an article or created a case from the Contact Support page
- Which subjects lead to support cases
- Which articles were most frequently viewed

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Note: User Types refer to Internal, Partner, Customer, and Guest users.

Page Views Dashboard

The Page Views dashboard represents the page views in your community.

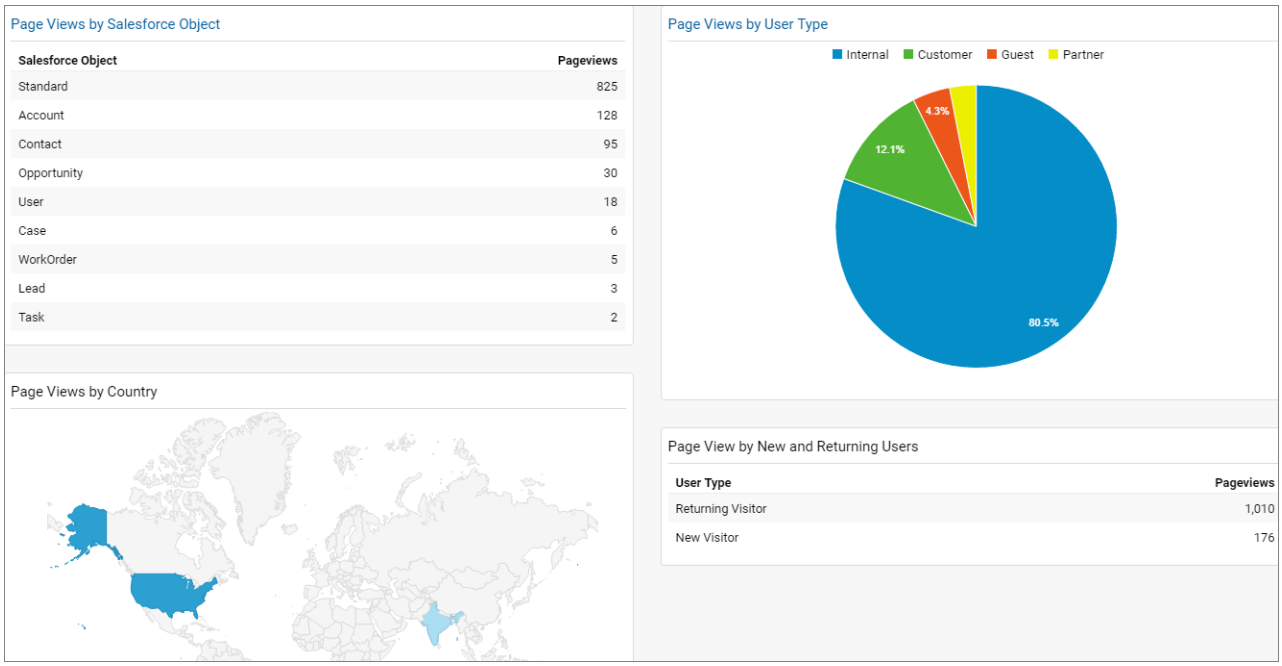
Track page views:

- By Salesforce object
- By User Type
- By location
- By new versus returning users

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Tracking User Flow

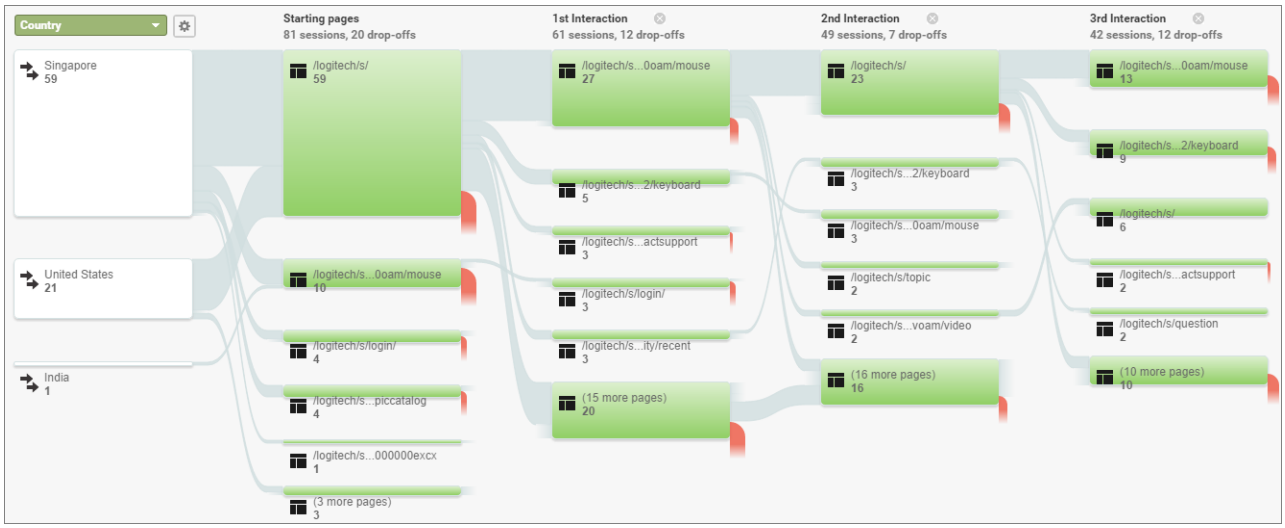
The User Flow tracks how different types of users are interacting with the community.

User Flow is a graph that tracks a user's navigation throughout the community. It provides insights into traffic patterns on your site. Traffic patterns provide valuable information a community's effectiveness and the path a user is likely to take when resolving an issue. Go to **Reporting** > **Audience** > **User Explorer** > **User Flow** to view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Manage Partner Relationships in Communities

Communities is a powerful tool for partner relationship management. Invite partners to a community and share CRM data with them to drive channel sales and marketing. Create a shared pool of leads and pass them to partner users in the community. Configure deal registration to allow partners to submit qualified deals, minimize channel conflict, and get early pipeline visibility. Use the power of Lightning and Salesforce and drive your bottom line together.

Note: If you have an existing partner portal, you can continue to use the portal to collaborate with partners. However, we strongly recommend you migrate your partners to a community. Partner portal licenses can be reused in a partner community.

Salesforce offers a powerful Lightning solution to help you build a partner community with button clicks, and no code: Partner Central. A community allows your partner users to log in to Salesforce through a separate website and access data you've made available only to them. In a partner community, you can:

- Extend Salesforce to securely expose CRM data with partners.
- Recruit, onboard, and educate partners (training and certifications).
- Manage your channel sales with programs, tiers, business plans, and partner scorecards.
- Manage lead distribution, deal registration, and quoting for channel sales.
- Streamline channel marketing with marketing development funds (MDF), marketing campaigns, and co-branded email communications.
- Provide a rich, personalized and mobile-ready experience to drive partner productivity
- Manage, track, and forecast partner sales ***alongside*** your direct sales in your Salesforce org.

With communities, you can publicly share information that you want all partners to see in a single location. You can also share data privately with specific partner users in the same community and restrict access with the security built into Salesforce.

Example: Here are a few industry examples of how a company can use a community to drive partner sales:

- A technology company can work with resellers to pass leads, register deals, and market products together
- A manufacturer can work with its distributors, wholesalers, and retailers in communities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

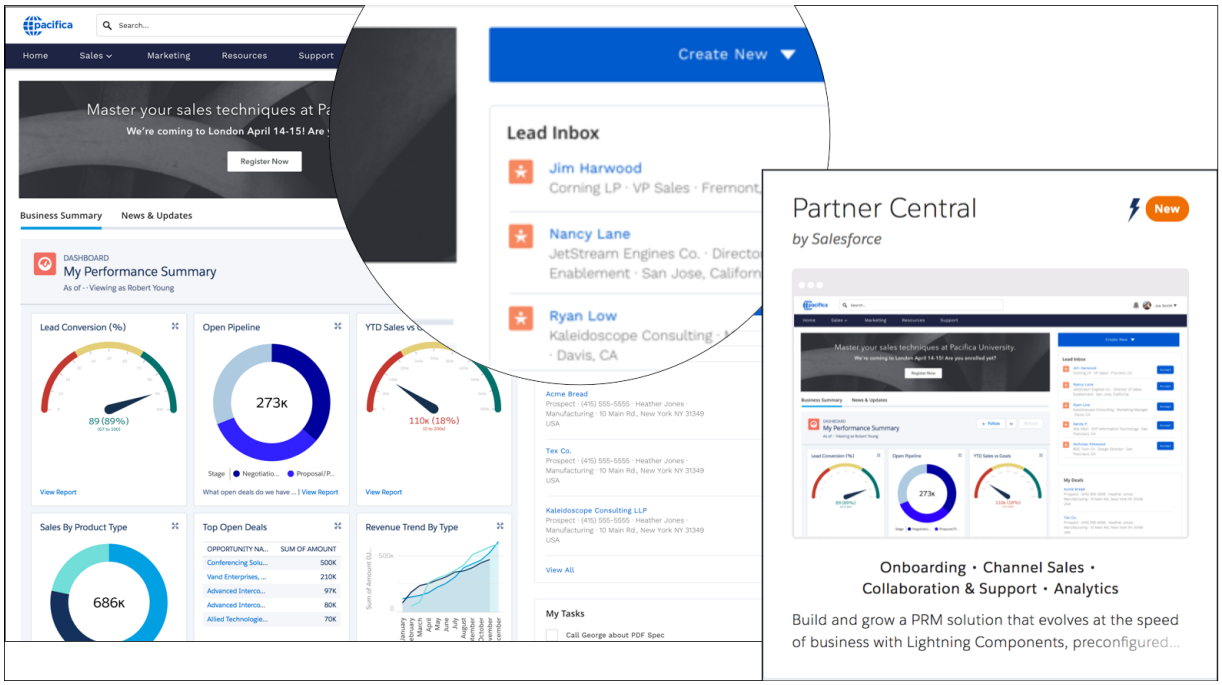
- An insurance company can work with independent brokers to track leads and sell insurance products.

SEE ALSO:

Migrating from Portals to Communities

Partner Central—Build Lightning Partner Communities

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales and marketing together. The Lightning Partner Central solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup combined with rich branding and a responsive UI lets you quickly build an exclusive online experience for your partners.



Partner Central comes predesigned with partner sales workflows in mind so you can build and grow your partner network and bring CRM to your partners in a shared space:

- Use the Lead Inbox component to configure lead distribution
- Configure deal registration and allow partners to submit qualified leads to beat competition
- Share training materials, sales collateral, and other resources
- Provide market development funds to drive deals and incentivize partners
- Map reports and dashboards of your choice to track deal closure, lead activity
- Organize channel partners into programs and levels to provide them with different experiences and resources based on their rank and region
- Evaluate and promote partner users based on their performance with scorecards that track them against KPIs
- Share marketing campaigns and brand assets to provide the structure and guidance necessary for partners to successfully execute campaigns.
- Configure Google Analytics to monitor community activity

Get started with this handy recipe of setup tasks to create your own community with Partner Central.

Create a Partner Community with Partner Central—Setup Tasks

Partner Central is designed with partner sales workflows in mind and comes with components and pages that you can use directly or customize easily.

Get started with your own Lightning partner community! We've put together a high-level roadmap—or a recipe, if you will—of the decisions and tasks involved with setting up a community with Partner Central.

Planning	• What's Your Partner Community Strategy? • Buy Partner Licenses • What Template Can I Use? • Lightning Communities Limitations	*Prep Your Salesforce Org for a Partner Community*	• Set Up the Channel Manager Role • Create Partner Accounts • Create Partner Users • Partner Profiles, Roles, and Sharing Considerations • Super User Access • Delegated Administration
Set Up a Partner Community	• Update Org-Wide Settings • Check Out Community Workspaces • Create Communities • Share More Salesforce Records in Your Community • Add more features with Guided Setup • Communities and Community Users in Your Salesforce Org	*Advanced PRM and Community Features*	• Lead Distribution • Deal Registration • Market Development Fund • Channel Programs and Levels • Community Moderation • Campaign Marketplace • Direct Messaging • Configure Dashboards to Monitor Your Community • Create Pages and Groups Targeted at Specific Audiences
Community Design	• Customize Your Community (Builder) • Customize Community Pages and Components (Builder) • Customize Community Navigation • Which Components Can I Use with Partner Central? • Customize the Lead Inbox • Customize the Quick Create Actions • Custom Theme Layouts	*Community Reporting*	• Community reports and dashboards • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Communities • Google Analytics™

Enable Partner Functionality in Your Org

Buy partner licenses to enable partner functionality in your org. Partner licenses are required to use the Lightning Partner Central community template, set up partner accounts, and create partner users in your org.

When you buy partner licenses, the following functionality is enabled in your org:

- The Partner Central community template.
- The default Partner User profile. You can clone it to create custom partner profiles or extend data access via permission sets.
- Three standard partner roles: Partner User, Partner Manager, Partner Executive. When you create partner accounts, you can associate one of these roles with the partner users.
- A sharing rule group and category targeted at partner users.
- The **Manage External Account** and **Enable as Partner** buttons on accounts.
- A **Manage External User** and **Enable Partner User** button on contacts.

Note: If you have previously purchased partner portal licenses, you already have these features in your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Templates Supported for Partner Communities

The choice of template for creating a partner community depends on your company's branding requirements and the development effort you can invest in for the design of your community.

Use Partner Central to use a highly customizable template that uses slick Lightning components, just like Customer Service. Partner Central is designed with channel sales workflows in mind, and comes with the Lead Inbox component to support lead distribution. You can also configure deal registration to allow partners to submit leads from the community with a few button clicks and no code. Plus, you get the same rich, responsive Lightning look and feel across devices, including mobile devices.

If you prefer the Salesforce Classic look and feel, use the Salesforce Tabs + Visualforce template. This option allows heavy rebranding, but you'll need developers with Visualforce skills.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What's Your Partner Community Strategy?

The type of partner community you create depends on your business, your channel sales program, and the tiers within it. For example, the strategy for a hardware manufacturer with a few partners is different from that of an insurance company with a large agent network.

Try to get early answers to these questions to plan your community strategy:

- How many Partner Community licenses do I need?

  Note: If you don't need access to all sales objects, such as opportunities, leads, and campaigns, you can also use Customer Community Plus licenses for partners.

- Can I invite all my partners to the same community or do I need multiple communities?
- What objects do I need to grant permissions for in my partner profiles? Do I need to three roles per account?
- What level of data visibility and privacy do I need for my community?
- Do I want to allow my partners to self-register?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For more ideas on planning your community strategy, check out this Trailhead module for Communities.

SEE ALSO:

Communities User Licenses

Migrate from a Partner Portal to a Community

Salesforce recommends that you migrate from partner portals to communities. Portal licenses are supported in communities so you don't need to switch to community licenses.

Note: Starting from Summer '13, portals are no longer available for new Salesforce orgs. Existing organizations using portals can continue to use their partner portals or migrate to communities. If you don't have a partner portal, but want to share records and information with your partners, give Salesforce Communities a try. Contact Salesforce for more information.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Migrate from Portals to Communities?

Communities offer all the functionality available in portals and customer portals, plus more features including:

- A rich, responsive, mobile-ready Lightning solution designed with channel sales and marketing workflows in mind: Partner Central
- Build personalized, rich experiences with your company's branding
- Collaborate with your partner users in groups and feeds
- Share files
- Access to reports and dashboards plus the ability to create custom reports for your community
- Single sign-on and login support for multiple authentication providers
- Content moderation, direct messages, and much more
- Single location where you can design, moderate, and manage your community

Plus, we're working round the clock to bring you more features in every release.

See the Migrating from Portals to Communities guide for more information on how to migrate your portal users and data over to a community.

If You Continue to Use Partner Portals

All the information about setting up partner accounts, users, portals, and tracking partner sales is available in the Salesforce Partner Portal Guide.

Prep Your Org for a Partner Community

USER PERMISSIONS

To view accounts:	Read on accounts
To create accounts:	Create on accounts
To disable a partner account:	Manage External Users
To create, edit, disable, or deactivate partner users:	Manage External Users
To create contacts:	Create on contacts
To view contacts:	Read on contacts
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You've bought your partner licenses and have partner functionality enabled in your org. You're ready to collaborate with your partners and start closing deals together. Before you actually create a partner community, work with your channel manager to create partner accounts and users, assign partner roles, and manage permissions.

At the very outset, set up the channel manager role and assign it to the internal users in your org who manage channel sales and work with partner organizations.

Channel managers with the necessary permissions can perform the next steps.

1. Each partner account is automatically assigned three partner roles.

   Tip: We strongly recommend that your reduce the number of roles to one role: Partner User. To avoid role proliferation, it's better to use one role and grant super user access to users who need access to other users' data.

2. In Setup, type *Sharing Settings* in the Quick Find/Search box and edit the organization-wide defaults. Set the Default External Access setting to **Private** for all the objects you want to share with your partners.
3. Clone and customize the Partner User profile per your community's needs and, if necessary, grant extra permissions with a permission set.
4. Create a partner account for each partner organization you work with. Partner accounts store details about partner users and their sales data.
5. Also, plan how you want to use sharing rules to share data with partners.
6. Add users from each partner company as contacts on the respective partner account.
7. Convert the contacts on the partner account to partner users and assign a partner license, profile, and role.
8. Optionally, enable and grant super user access to partner users if you want them to view data owned by other users in their role hierarchy.

9. If you work with many partner users or don't want to deal with user management for a partner organization, consider delegating user administration.

With that, you're ready to set up a community and assign partner users to it.

SEE ALSO:

Default Organization-Wide Sharing Settings

Controlling Who Community or Portal Users Can See

Set Up the Channel Manager Role

Channel managers are internal users who manage your partner accounts and partner users. Before setting up a partner community, identify an internal user to play the channel manager role.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Channel Manager Role

Ideally, channel managers should create all the partner accounts for the partner organizations they manage. All partner users associated with a partner account automatically fall below the channel manager in the partner role hierarchy. So all the data owned by those partner users rolls up and is visible to the channel manager.

Channel Manager Profile

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a custom profile for channel managers or use a permission set to grant permissions to a standard profile. A few tips on what you might want to include:

Grant the "PermissionsManagePartners" permission
When this permission is enabled, channel managers can create partner accounts and partner users.

Make the following objects available to channel managers
Leads, Accounts, Contacts, Opportunities, Documents, Campaigns, Products, and any other object you plan to share with partner users in your community.

Assign record types
Assign record types to channel manager profiles. For example, the Lightning Partner Management solution includes two lead record types: one to track sales leads and the other to register deals. Make sure that your channel manager has access to both.

Make the `Partner Account` field visible to channel managers on leads, accounts, and opportunities
Channel managers can create list views or reports for tracking partner user activity.

Assign page layouts
Assign the appropriate page layouts to your channel manager profiles.

Make the `Last Transfer Date` field visible to channel managers on leads
Channel managers can create lists views or reports for tracking partner user activity.

More Tips

- Create a public sharing group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead queue for channel managers. You can use this queue for lead assignment rules.

Create Partner Accounts

Add each company with which you partner to Salesforce as a business account. We recommend that channel managers create partner accounts so they can view all partner data.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner community or partner portal. A channel manager who owns a partner account can access all the data associated with the partner account and the associated partner users.

Note: The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

1. Create a business account.
2. Click **Manage External Account**, and then click **Enable as Partner**.
3. In the confirmation dialog, select **Yes, I want to enable this account as a Partner Account**.
4. Click **Confirm**.

Note:

- If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.
- Partner accounts can't be deleted, but they can be disabled.
- To enable a partner in Lightning Experience, add the **Enable Partner User** button to the **Salesforce Mobile and Lightning Experience Actions** section on the Account and Contact page layouts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To create a partner account:
- Manage External Users

After you create a partner account, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects, such as opportunities, leads, and campaigns. Partner users can access and modify the Salesforce data you share with them by logging in to a community. They can be added to account or opportunity teams.

SEE ALSO:

Add Account Team Members

Disable Partner Accounts

You can't delete partner accounts, but you can disable them. Disabling a partner account disables partner users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for community access.

If you choose to disable a partner account:

- Up to 15 active and inactive external users associated with the account are permanently disabled. You also remove them from all communities, groups, teams, permission sets, and sharing rules they're associated with.
- If there are more than 15 active or inactive external users associated with an account, you can't disable it. Disable the users before disabling the account.
- Roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.

1. Go to the account detail page for the account you want to disable.
2. Click **Manage External Account**, then click **Disable Partner Account**.
3. Click **OK** to confirm.

Warning:

If you decide to re-enable the account in the future, you can re-enable individual contacts as partner community users. Re-enabling a contact for a partner community creates a partner user record that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To disable a partner account:
- Manage External Users

Create Partner Users

After you create a partner account, add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects such as opportunities, leads, and campaigns. Partner users can access Salesforce data when they're invited to a community.

Tip: Before creating partner users, configure your community so your partner users don't log in to your community before it is ready.

1. View the partner account contact you want to convert to a partner user.
2. On the contact detail page, click **Manage External User** and choose **Enable Partner User**.

   Note: To manage an external user in Lightning Experience, add the following buttons to the **Salesforce Mobile and Lightning Experience Actions** sections of the Account and Contact page layouts.

   - On Accounts:
     - **Enable as Partner**
     - **Disable Partner Account**
     - **Disable Customer Account**
   - On Contacts:
     - **Enable Customer User**
     - **Enable Partner User**
     - **Enable Super User Access**

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, disable, or deactivate partner users:
- Manage External Users

To create contacts:
- Create on contacts

To view contacts:
- Read on contacts

- **Disable Customer User**
- **Disable Partner User**
- **Disable Partner Super Access**
- **Log in to Community**
- **Log in to Portal**

3. Edit the user record for this partner and assign a partner license, role, and profile.

   Tip: You can use a Customer Community Plus license if the user doesn't require access to CRM objects, such as opportunities, leads, and campaigns.

4. Click **Save**.

After you create a partner user, you can edit the partner account and the partner user independently. Changes made to one are not reflected in the other.

Tip: To check or troubleshoot issues with the partner user account, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you are logged in to the community as a community user.

Consider the following when creating partner users:

- The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it.
- The **Role** drop-down is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- Unlike a standard user, the partner user role is automatically assigned based on the account name.
- The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.
- Partner users and contacts cannot be deleted. If you no longer want a partner user to have access to their community, deactivate the partner user.
- If you have enabled a user as a delegated administrator, note the following requirement. Before the user can create an external user, you must add at least one partner profile to the Assignable Profiles related list and assign the user the "Manage External Users" permission.

SEE ALSO:

Communities User Licenses

Partner User Profile

When you buy Partner Community licenses, the Partner User profile is automatically created in your org. The Partner User profile can't be modified, but you can clone it or create permission sets to specify what partner users can do.

Note: The Partner User profile is also available in your org if your organization has bought Partner Portal or Customer Community Plus licenses.

The profile you assign to partner users defines what data they can access within a community. For example, you can control whether users can view, create, or edit cases and custom object records using profiles and permission sets. You can also clone the Partner User profile and create custom profiles with varying permissions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For each cloned profile, ensure that the "API Only User" permission is not selected. Users associated with this permission selected aren't able to log in to their communities.

Partner User Roles

USER PERMISSIONS	
To manage partner users:	Manage External Users
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To create, edit, and delete page layouts:	Customize Application
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you enable the first external user on a partner account, a user role hierarchy is created for that account. This role hierarchy rolls up to the account owner (typically, the channel manager). The three roles in this hierarchy are Partner User, Partner Manager, or Partner Executive. When you create contacts on the partner account and convert them to external users, assign one of these roles to them.

The Partner User role rolls up to the Partner Manager role, which rolls up to the Partner Executive role. The Partner Executive role rolls up to the Channel Manager role. Partner users at a given role level are able to view and edit all data owned by or shared with users below them in the hierarchy, regardless of your org's sharing model.

The role names include the partner account name. For example, if the partner account name is Acme, the three roles created for the account are called Acme Partner User, Acme Partner Manager, and Acme Partner Executive. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.

Tip: We recommend that you reduce the number of roles to one. Grant super user access to partner users if you want them to see other partner users' data.

You can delete partner roles, in which case the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager but its object ID remains the same. When you create a partner role, it is automatically placed at the bottom of this hierarchy. You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see the SOAP API Developer's Guide.

SEE ALSO:

Communities User Licenses

Set the Default Number of Community Roles

Sharing Data with Partner Users

Sharing groups and a sharing rule category are available by default in your org to share Salesforce data with partner users in a community.

Tip: Org-wide defaults and field-level security also control data access for partners in communities. Set the Default External Access setting to **Private** for all the objects you want to expose to partner users in your community.

After you buy partner licenses for your org, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role, including users in roles below the selected role. Partner roles are excluded.

Use these groups and the sharing rule category to easily create sharing rules that grant all community, portal, or Salesforce users access to specific data.

Note: Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing set support for the Contacts to Multiple Accounts feature is available as a pilot feature.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage partner users:
- Manage External Users

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To set sharing rules:
- Manage Sharing

Set Partner Username Uniqueness Requirement to the Org Level

You are no longer required to create a username that is different from all previously created usernames, when adding someone to a community. Select **Require unique usernames for partners in this org** to contain the unique username requirement to one org and one org only. After you enable this preference, it can't be reversed.

Orgs created after Winter '19 automatically contain username uniqueness at the org level. Contact Salesforce Customer Support to enable this option in orgs created before Winter '19. Go to **Setup** > **Communities Settings**to turn on this preference. Once enabled, partners are required to provide their org IDs when logging in through an API.

Note: Uploads using Data Loader, Excel Import, and Sendia are not available to partner users with this preference enabled.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Leads for Visualforce Communities

If you are using the Salesforce Tabs + Visualforce template, enable leads for partner users in your community so that they can access and create leads in your communities.

When you enable leads for partner users in your community, you can assign leads to those members. Also, partner users can edit leads, create leads, import leads, and mass update leads in a list view.

1. Open Community Workspaces or Community Management.
2. Click **Administration** > **Tabs**, and add the **Leads** tab to the list of available tabs in your community.
3. In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. If you plan to apply these permissions selectively, we recommend using a permission set .
   a. If using a permission set, use the following settings for leads:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select Read, Create, and Edit.
   b. If using a profile, such as the Partner User profile, set the leads tab setting to `Default On` and enable the Read, Create, and Edit object permissions for leads.
4. Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.

   Note: Partner users with legacy portal licenses can use these advanced features in communities, but not in portals.

Feature	Partner User Permission Needed
To import leads using the **Import Leads** link on the Leads tab in your community. If your partner user is importing leads, it might also make sense to allow them to import accounts and contacts using the **Import My Organization's Accounts & Contacts** link on the Accounts and Contacts tabs in your community.	"Import Leads" AND Optionally, "Import Personal Contacts"
To change the status of multiple leads via the **Change Status** button.	"Manage Leads"
To change the owner of multiple leads via the **Change Owner** button.	"Transfer Leads"

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable leads for partner users:
- Manage Profiles and Permission Sets

Assign Cases to Partners

Assign cases to partner users so they can view, modify, and update case information.

Before you assign cases to partners, ensure partners have permissions to read and update cases. You can only assign cases that you have access to.

1. On the case detail page, click **[Change]** next to the **Case Owner** field.
2. Select **Partner User** from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the **Send Notification Email** checkbox to send an email to the new owner.
4. Click **Save**.

The partner user can view and edit the case from their community.

Note:

- Case comments added by partner community users are public and visible to any user that can view the case.
- You can create case assignment and escalation rules that automatically assign cases to partner users based on criteria that you define.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign cases to partners:

- Edit on cases

  AND

  Transfer Cases or Transfer Record

Assign Tasks and Events to Partners

If you have added a calendar to your community, you can add events to it. Partner users with the Edit Events permission can create and edit their own events. Also, with the appropriate field-level security settings, partner users can view and create activities related to leads or opportunities.

Partner users can add tasks to leads or opportunities as reminders of particular tasks. Administrators and channel managers can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users. A partner user can only add tasks for or see calendars shared by:

- Other partner users assigned to the same account.
- The channel manager for their account.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign events to partner users:

- Edit Events

Grant Super User Access to a Partner User

Super users can get insights into the records of other partner users who are at their role level or below them in the role hierarchy. Super users can access records according to their level of permissions. For example, if a manager with full access to cases is granted Super User Access, then they can view and edit cases of other managers and their direct reports. A different manager who has read-only access to cases can only view the cases of other managers and their direct reports, even as a Super User.

A few things to consider before you grant super user access to users.

- Enable Partner Super User Access in your Communities Settings before granting access to individual partner users.
- Partner super user access applies only to cases, leads, custom objects, and opportunities.
- Partner super users have access based on their user permissions.
-

Partner Super Users with Role	Can Access Data Owned By or Shared With
Partner Executive	– All partner users and partner super users in the same role – Manager and User roles below them in the hierarchy
Partner Manager	– All partner users and partner super users in the same role – User roles below them in the hierarchy
Partner User	All partner users and partner super users in the same role (User roles only)

- Use this information to grant super user access to users with Partner Community licenses.

1. View the contact record for the user on the partner account.
2. Click **Manage External Account**, then choose **Enable Super User Access**.
3. Click **OK**.

This grants super user access to the user with a Partner Community license. You can also grant super user access to users with Customer Community Plus licenses.

SEE ALSO:

Grant Super User Access to Customer Users in Your Community

Enable Super User Access for Your Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Partner Super User Access:

- Customize Application

Delegate External User Administration

If your partner organizations have a large number of users, you can delegate user administration to external users.

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

External users who are delegated administrators can:

- Create and edit external user records
- Generate new passwords for external users
- Deactivate existing external users

You can grant delegated external user administration rights to users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, and Customer Portal Manager licenses.

Note: The "Portal Super User" permission is automatically enabled on Customer Community Plus profiles when they are granted delegated external administration rights. Disabling "Delegate External User Administration" does not also disable the "Portal Super User" permission.

1. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles** and click a custom profile.
2. Click **Edit**.
3. Select **Delegated External User Administrator**.
4. Click **Save**.
5. Click **Edit** in the Delegated External User Profiles related list.
6. Select the profiles you want users with this profile to be able to administer.
7. Click **Save**.

To activate or deactivate a user or reset their password, open their contact record from the community they belong to and click **Manage External User** > **View Partner User**. You can activate or deactivate a user and reset their password from this page.

Consider the following when setting up delegated external user administration.

- On the profile you're granting delegated administration rights to:
  - Add the "Create" and "Edit" permissions on contacts so that delegated administrators can create and update contacts related to their account.
  - Set the Accounts and Contacts tab settings to Default On so that delegated administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- Make sure accounts and contacts are available in your community.
- Optionally, set field-level security and page layouts so that delegated external user administrators can access only the account and contact fields you specify.
- Delegated administrators are automatically granted the "View Roles and Role Hierarchy" permission, but this permission is not revoked when you revoke the delegated user permission from the profile. If you don't want those users to view roles, make sure you revoke the View Roles and Role Hierarchy permission from their profile.
- To activate or deactivate a partner or customer user or to reset their password in Lightning Experience, add the following buttons to the **Salesforce Mobile and Lightning Experience Actions** section on the Contact page layout.

- **Disable Partner User**
- **Disable Customer User**
- **Enable Partner User**
- **Enable Customer User**
- **View Partner User**
- **View Customer User**

SEE ALSO:

Create Communities Users

Grant Super User Access to a Partner User

Share More Salesforce Object Data in Your Community

Add Tabs to Your Community

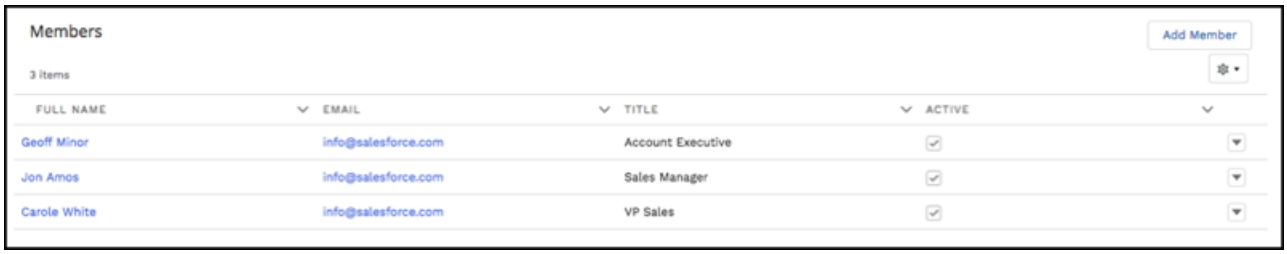
Delegated Account Management

Channel managers can delegate partner users to manage accounts. Using the Members tab, delegated account managers can create, edit, reset a member's password, and activate or deactivate an account. They can also upload brand logos and save company information for admins or channel managers to use when creating co-branded email templates for partner users. Brand logos and company information can also be used for co-branded marketing campaigns, deal notifications, and websites.

EDITIONS

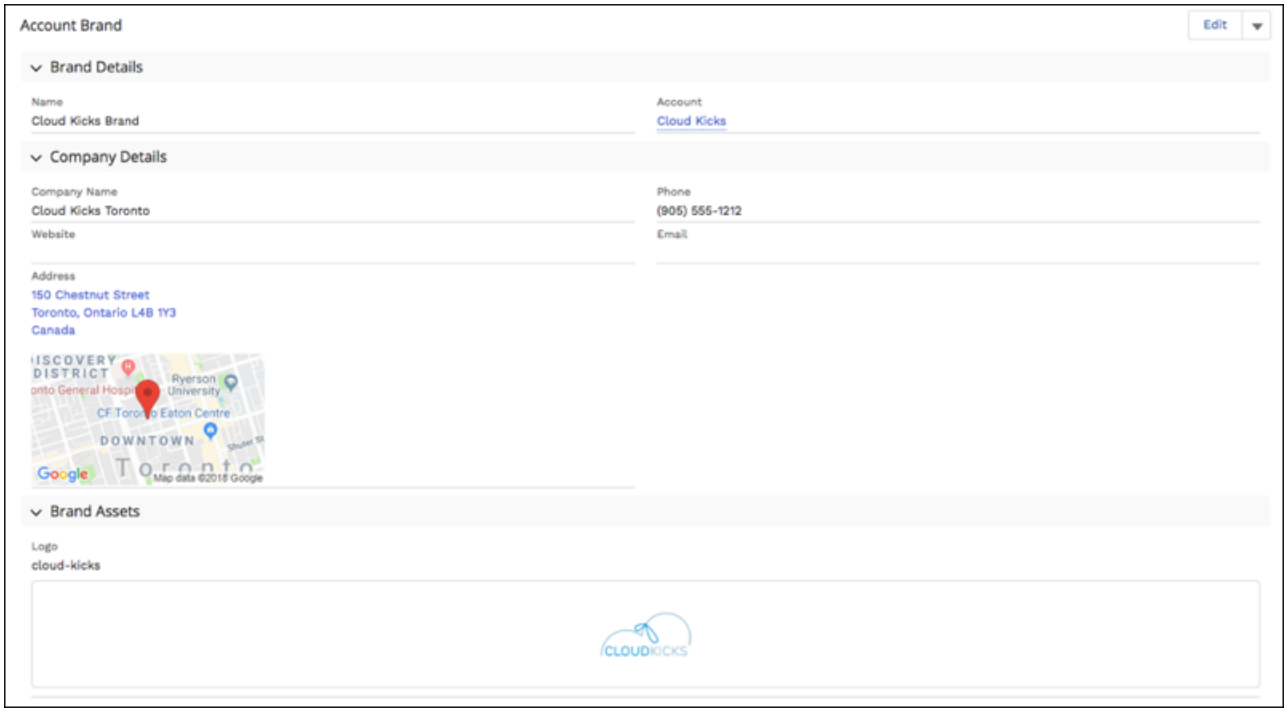
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Partner users who have been granted delegated external user administration rights can access Account Management from their community. From Account Management, they can manage members of their partner account from the **Members** tab.



Members created from Account Management use the new **Community Member Layout**, which can also be found in **User Page Layout**.

Channel account managers and admins can create co-branded email templates, websites, and marketing campaigns from information uploaded to the **Branding** tab.



Merge fields under **Sender Brand** pull information from Account Brand directly into the email template.

Note: Co-branded email templates are available to internal users with access to Account Brand. Using Account Brand merge fields without access to Account Brands results in unresolved merge fields.

Add the **Account Brand** and **Community Members** related lists to **Accounts**, to access member and brand information.

SEE ALSO:

- Manage Community Members with Members Tab in Account Management
- Manage Partner Brands with the Branding Tab

Manage Community Members with Members Tab in Account Management

Help keep partner users moving with the Members tab on the Account Management page. With just a few clicks, delegated admins, internal users, and administrators can activate, deactivate, create new, and edit members. They can also reset community member passwords.

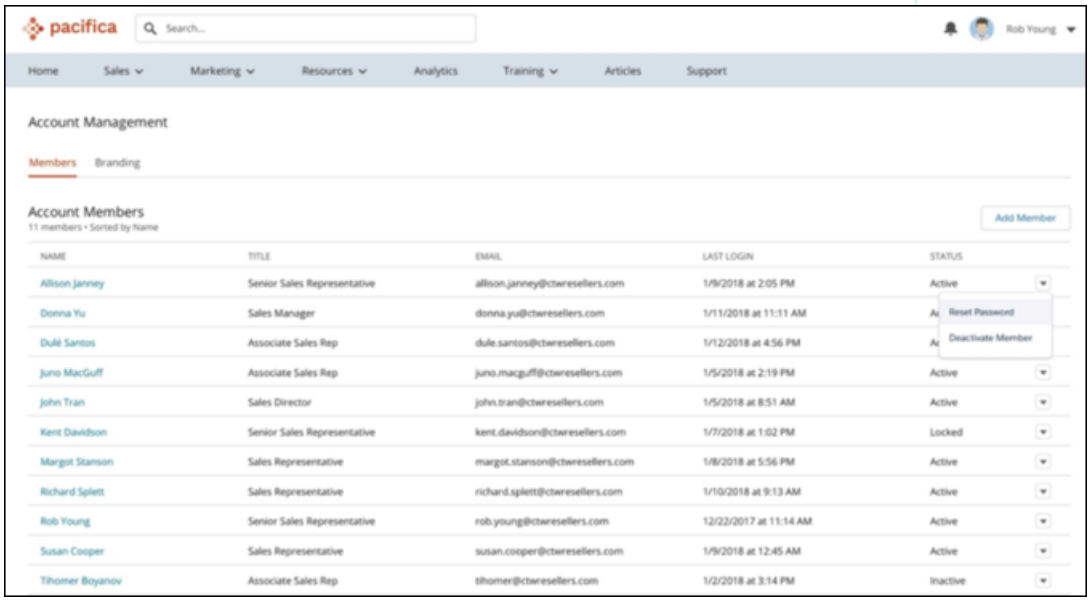
Users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, and Customer Portal Manager licenses, can manage community members from the Members tab.

Add the **Community Members** related list to **Accounts** to provide partner users access to member details.

Admins, internal users, and delegated admins can easily deal with staff changes or loss of community access.

1. From your community, click your username and go to **Account Management** > **Members**.
2. Click the dropdown arrow next to the member's name to reset their password.
3. Select or deselect the box in the **Active** column to activate or deactivate a member.
4. Click **Add Member** to create a member.

Example: Let admins, internal users, or delegated administrators handle the day-to-day administration of an account.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

Manage Partner Brands with the Branding Tab

Delegated external admins can store partner brand information in the Community Branding tab. Channel managers can access this page to create co-branded emails, marketing campaigns, and websites. Partners can also use information collected from Branding in partner-specific apps.

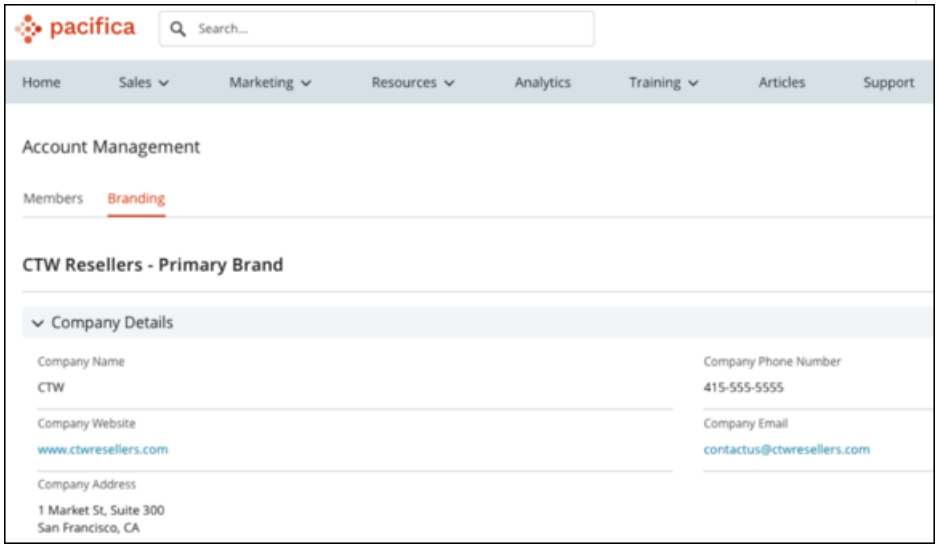
Users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, and Customer Portal Manager licenses, that have been granted delegated external user administration rights, can update and create branding assets from Branding.

Add the **Account Brand** related list to **Accounts** to provide partner users access to company brand information.

Once you've granted a partner delegated external administration rights, they can add brand details to Branding in Account Management.

1. From your community, click your username and go to **Account Management** > **Branding**.
2. To add account brand details, click **New**.

Example: Add brand assets to share company information, websites, and logos with channel managers.



Note: When accounts containing brands are merged, the brand associated with the master account will be retained. Brands associated with non-master accounts will be moved to the Recycle Bin, even if there is no brand associated with the master account.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

Optimize Account Roles to Improve Performance and Scale Your Org

Minimizing the number of roles you use for customer and partner community accounts can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single community user. In this scenario, all accounts with one community user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles.

When the first role-based community user is provisioned for a customer or partner community account, a shared person role is created. This role is used instead of your org's default number of community roles, and it rolls up to the account owner.

When a second user is added to the customer community or the partner community account, account role optimization no longer applies. Instead the account creates the org's default number of community roles. Both users are assigned to a regular community role. In a three-role hierarchy, the Executive, Manager, and User roles are created. The top-most role rolls up to the account owner.

Account role optimization interacts with customer communities and partner communities independently. If an account has a single customer community user and two partner community users, account role optimization applies only to the customer community user. The customer community user is assigned to the shared customer community person role. Each partner user is individually assigned to one of the account's partner community roles. This feature doesn't affect role usage for person accounts.

Role or Community User Allocations	Allocation	Details
Total roles used in customer and partner communities	5,000	This allocation includes all roles associated with both customer and partner communities. If you need more roles, contact Salesforce Customer Support.
Maximum person account community users that a Salesforce user can own	10,000	Contact Salesforce Customer Support to increase this allocation.

1. From Setup, enter *Sharing Settings* in the Quick Find box and select **Sharing Settings**.
2. In the Other Settings section, enable **Use person role for first user in community account**.

Review how account role optimization responds to account changes.

Change to Account	Account Role Optimization Response
Account merges	A shared person role is used when an account merge results in a single community user or a single portal user (or one of each type).
Change in account ownership	The single community user assigned to the original account owner is reassigned to the new owner's shared person role.
Community user license upgraded to a role-based community user license	If the account owner doesn't already have another role-based community user, a shared person role is assigned to the community user.
Contact moved to a different account	Regular community roles are used regardless of whether a role-based community user exists in the new parent account.

SEE ALSO:

- Sharing Considerations for Using Account Role Optimization in Communities
- Partner User Roles
- Create Communities Users

Sharing Considerations for Using Account Role Optimization in Communities

The combination of role-based sharing and account role optimization provides access to records and reports across accounts in communities. Consider using targeted sharing access when you activate account role optimization. When an account is optimized for roles and is using role-based sharing, any role-based share for that account exposes its records to all other accounts that roll up to the same shared person role.

Note: Role-based sharing and account role optimization are available for Customer Community Plus and Partner Community licenses.

Let's look at an example.

Acme has a high volume of customer and partner community accounts, and enables account role optimization to help minimize the number of community roles they use. Using account role optimization Acme is able to have multiple community accounts share the same person role.

Acme has Apex sharing code that shares certain types of records based on roles. This combination of account role optimization and role-based sharing exposes these records to community users across multiple accounts in Acme's org and communities.

To address this situation, Acme reviews their Apex sharing code, triggers, and workflows. They locate every instance where record access is linked to roles, remove role-based sharing, and write code to target sharing access to specific community users.

When using account role optimization, it's best to adjust your sharing settings to share directly with account users.

Consideration	Recommendation
Using Apex Sharing Code and Apex Triggers	Review your existing Apex sharing code, triggers, and workflows, and determine if record access is linked to roles. If a community user from an account that uses account role optimization must access specific records, update your Apex sharing code to target the user instead of a role. Do consider what action to take if a second user is added to the account and a new account role is created.
Using Record Access on a Role	If you grant record access using a role that is associated with account role optimization, the original user loses access to the record if a second user is added to the account. An Apex trigger or workflow can prevent this from happening. **Recommendation:** Create an Apex trigger or workflow to allow the community user to retain access to records even if a second community user is added.
Sharing Records, Folders, or Reports with Community Accounts	If you want community account users to have access to: • records • folders • email folders • reports • dashboards • list views • dashboards it's best to use targeted sharing. If you choose to use sharing rules, don't target the shared person role. Role-based sharing grants access to all accounts that roll up to the shared person role. **Recommendations:**

Consideration	Recommendation
	Create a public group and add the community user to that group. Then use the public group as the target of the sharing rule. Another option is to use manual sharing or Apex-managed sharing to share the object directly with a user. Share list views, folders, reports, or dashboards directly with account users, instead of using role-based sharing.

Use a Shared Person Account Role for Community Users

Convert single-user accounts associated with communities to use a shared person account role.

Important: If you have a large number of business accounts with a single community user, we recommend enabling account role optimization for increased performance in your communities.

The PortalRole field in the User object is used to specify user roles.

1. Enable account role optimization in your org to use shared person account roles.
2. Update the role of a community user to the shared person account role via Apex. This sample Apex code illustrates how to update the role of a community user, and convert the user to the shared person account role.

```
User u = new User();
u.Id = '<user id>';
u.PortalRole = 'PersonAccount';
update u;
```

SEE ALSO:

Optimize Account Roles to Improve Performance and Scale Your Org

Manage Channel Partnerships with Channel Programs and Levels

Use channel programs and levels to organize and manage channel partners. Within each program, you can group partners into levels, such as bronze, silver, and gold, and promote them based on performance. Use sharing groups, audience targeting, and sharing settings to manage access to resources based on program or level.

Organize Partner Users

- Group partners by type or geography
- Create levels within each program that organize partners by position or rank
- Add or remove members from channel programs or levels using groups
- Promote or demote users by changing group membership

Manage Access to Resources

- Use audience targeting to create different versions of a page with criteria fields specific to each program level

- Use the criteria fields for audience targeting to assign visibility to certain components or branding sets
- Set organization-wide defaults and sharing settings to control access to Channel Program Level and Channel Program Member objects
- Offer incentives to different levels, such as market development funds, to motivate partner users to meet Key Performance Indicators(KPIs)

Track Individual Performances

- Measure partner users' performances, and establish benchmarks for their channel programs
- Customize partner scorecards so that you get the report summary results that channel account managers or executive teams wants to see
- Add multiple scorecards for tracking different categories

SEE ALSO:

Considerations for Using Criteria-Based Audiences

Market Development Funds

Track Performance with Partner Scorecard

Manage Channel Program Members with Sharing Groups

Create a Channel Program

Channel programs help channel managers organize multiple-channel sales organizations. Managers can create programs for different types of partner users, like Resellers, Value Added Resellers (VARs), Distributors, and Managed Service Providers (MSPs). They can also organize partner users based on geography or level of expertise.

Channel Programs are available to users with Partner Community licenses.

Create a channel program to provide partner users access to leads within their region, relevant marketing events, and relevant resources. If a partner user joins a team, you can add them to a channel program by making them a channel program member. You can add or remove channel program members from a channel program at any time.

Tip: Enable feed tracking on the Channel Program Member object to easily track partner activity, such as when a member changes to a different level. Be sure to add the Name column to the Channel Program Member related list. You can use the name to navigate to a member's feed.

1. Click the App Launcher and enter `Program` in the Find an app or item box.
2. Select **Channel Program**.
3. Click **New** and enter a name, category, and description.
4. Activate the Program.
5. Save the channel program.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program
- Create on channel program

Create Channel Program Levels

Motivate partner users to meet Key Performance Indicators (KPIs) using program levels. Create multiple levels within a program, and assign each partner user to a level that is based on their performance. Different levels can offer different incentives. For example, the Gold level can provide access to market development funds, which can be used to help the partner make more sales. Channel program members assigned to the Silver level can work toward the Gold level to gain access to market development funds.

Channel Programs are available to users with Partner Community licenses.

EDITIONS

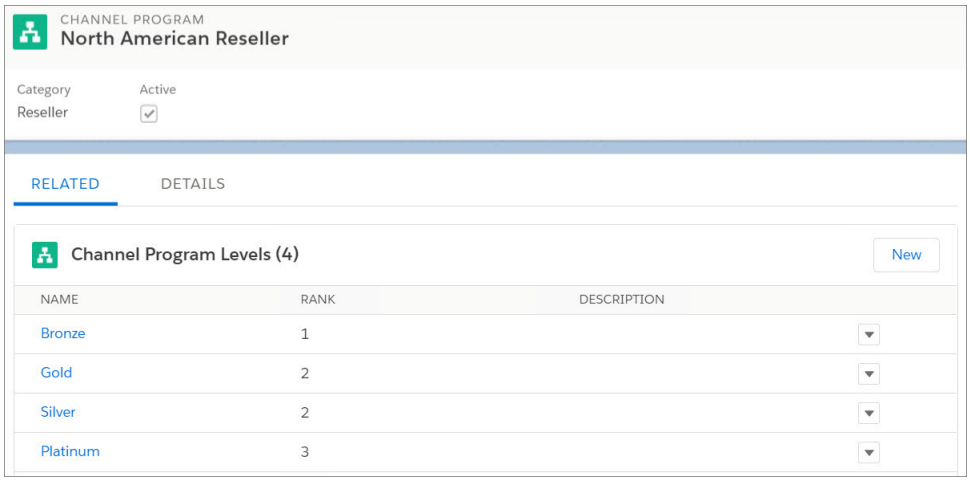
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program level

- Create on channel program level



Note: The My Channel Program list view shows levels of channel programs owned by and shared with a user.

Channel program levels help you organize members of a program into groups that are based on their performance and share different resources with different groups.

1. Click the App Launcher and enter `Level` in the Find an app or item box.
2. Select **Channel Program Levels**.
3. Click **New** and enter the name, channel program, rank, and a description.
4. Save the channel program level.

Manage Channel Program Members with Sharing Groups

Use sharing groups to manage Channel Program members. When new partner users join a team, you can add them to a Channel Program Member group. You can also move partner users to another group when they are promoted, demoted, or transitioned to a different area of expertise.

You can also use Channel Program Member sharing groups to manage access to resources within levels, such as public queues, list views, sharing rules, and folders.

Note: Deleting a partner account that was added as a channel program member, deletes the associated channel program member. Undeleting the partner account brings back the account and the channel program member, but the account is no longer enabled as a partner account.

Tip: Org-wide defaults and field-level security control data access for partner users in channel groups. Set organization-wide default to **Private** on Channel Program Level and Channel Program Member objects. Grant each partner user access to their level and member records to ensure that they have visibility into their accounts and opportunities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Channel Program Member Limits

Add up to 50,000 channel program members per organization.

Contact Salesforce Customer Support to increase the number of channel program members in your organization beyond the current limit.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Partner Account Relationships and Account Relationship Data Sharing Rules

Grant record access to partner accounts and protect confidential data, by sharing only select information. Channel account managers can use Account Relationship Data Sharing Rules and Account Relationships to target how information is shared and who it's shared with.

Account Relationship Data Sharing Rules allow you to define the criteria that are used to share object records with a partner account. The data sharing rule defines the relationship type, the information that is shared, and the record access given to the account that is gaining access.

Once you've created your data sharing rule, you can use it to share data with a partner account by creating an account relationship. The account relationship comprises the account that is sharing information, the account that is accessing those records, and the type of relationship they have.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Go to **Communities Settings** and select **Enable Account Relationships** under **Account Relationship Settings**.

SEE ALSO:

- Configure Account Relationship Data Sharing Rules
- Assign a Data Sharing Rule to an Account Relationship
- View Shared Account Records in Your Partner Community
- Considerations When Using Partner Account Relationships and Data Sharing Rules

Configure Account Relationship Data Sharing Rules

After account relationships are enabled, set up an account relationship data sharing rule. This rule defines the relationship type, the type of information shared, and the record access that is granted.

Partner Community or Customer Community Plus licenses are required to access Account Relationship Data Sharing Rules.

Tip: We recommend that you set **Leads** to **Private** to enable the external sharing model when you use this feature.

You can apply Account Relationship Data Sharing Rules to accounts, campaigns, cases, contacts, custom objects, leads, opportunities, orders, partner fund allocations, partner fund claims, partner fund requests, and partner marketing budgets.

1. Go to **Setup** and enter *Account Relationship* in the Quick Find box, then click **Account Relationship Data Sharing Rule Settings** > **New**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

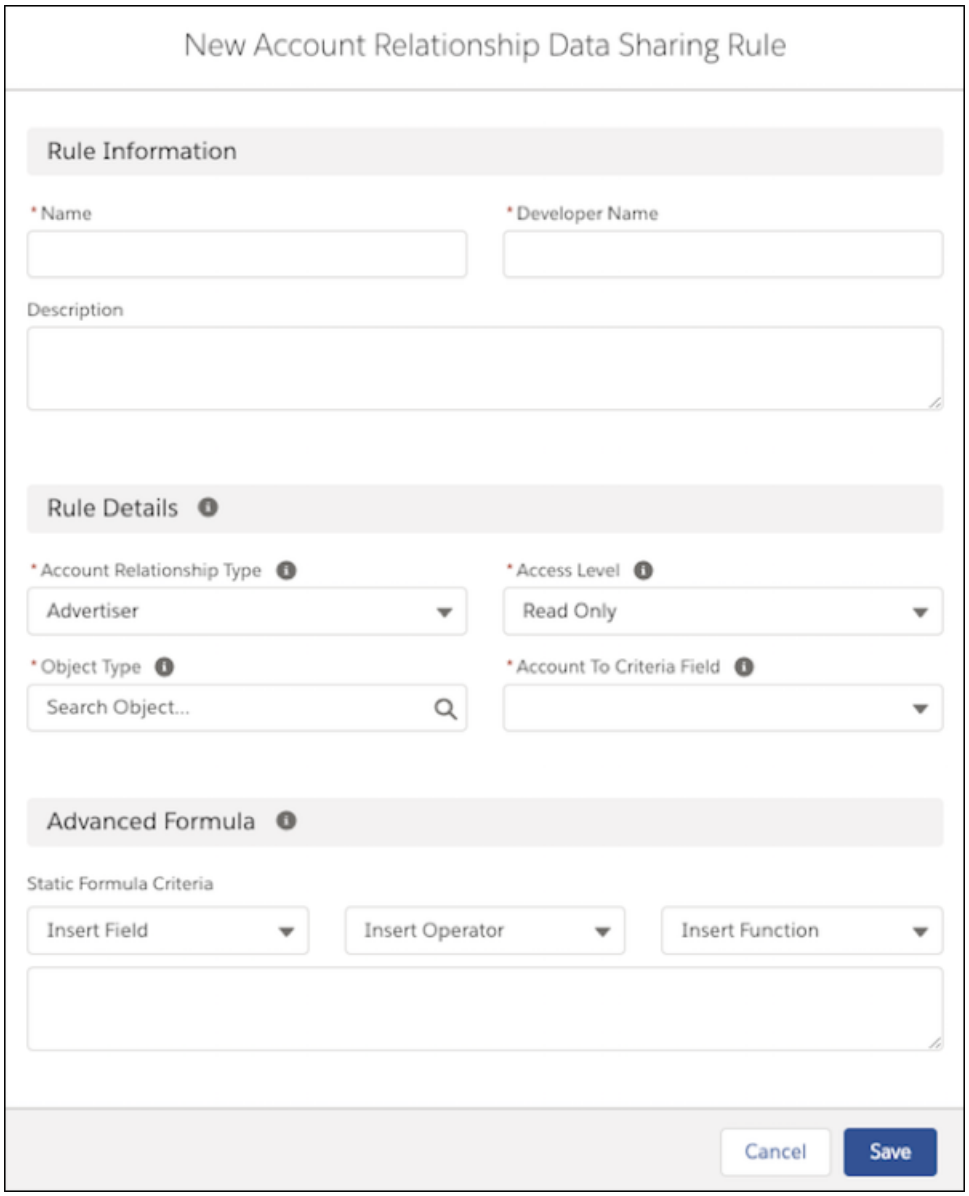
To create and manage Account Relationship Data Sharing Rules:

- Create and Set Up Communities

  AND

  You must be a member of the community

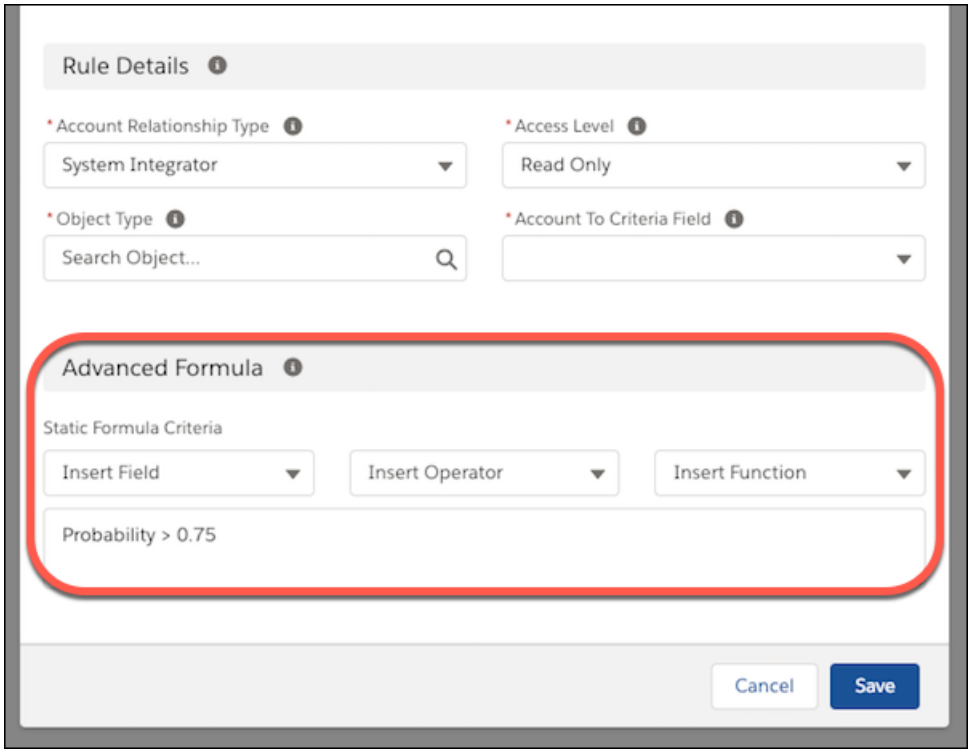
Example: Enter the type of relationship that uses the rule, the records they share, and the access granted.



The following fields define your sharing rule:

Field Name	Description
`Name`	The name of your sharing rule. We suggest that you use something that describes the rule, such as *`Lead Sharing for Distributors`*.
`Developer Name`	API name.
`Description`	A summary of the sharing rule. We suggest that you include information in this description about Object Type, Account Criteria To Field, Account Relationship Type, and Access Level.

Field Name	Description
`Account Relationship Type`	This field defines the type of relationship between the accounts that are sharing records. This field also associates the account relationship data sharing rule with the account relationship. If the Account Relationship Type picklist doesn't contain a value that you need, you can create a picklist value.
`Access Level`	The level of record access granted to the account that is receiving the information. Read and Write are the only access levels available.
`Object Type`	The object that you are sharing.
`Account To Criteria Field`	The field that determines how object records are shared. Use only owner and account lookup fields.
`Advanced Formula`	Static formula criteria that can be applied to the data sharing rule to further refine how objects are shared. When creating your static formula criteria, be sure to use the API name for any object fields that you include in the formula.



Note: The following field types are restricted for static criteria fields:

- Formula
- Roll-Up Summary
- Currency
- Custom Data Type

- Text Area (Long)
- Picklist (Multi-Select)
- Standard (Id)
- Text (Encrypted)
- Custom and Standard Lookup fields that aren't required

Warning: Changing the data type of the custom fields that have been entered in the static criteria formula can corrupt your account relationship data sharing rule.

Assign a Data Sharing Rule to an Account Relationship

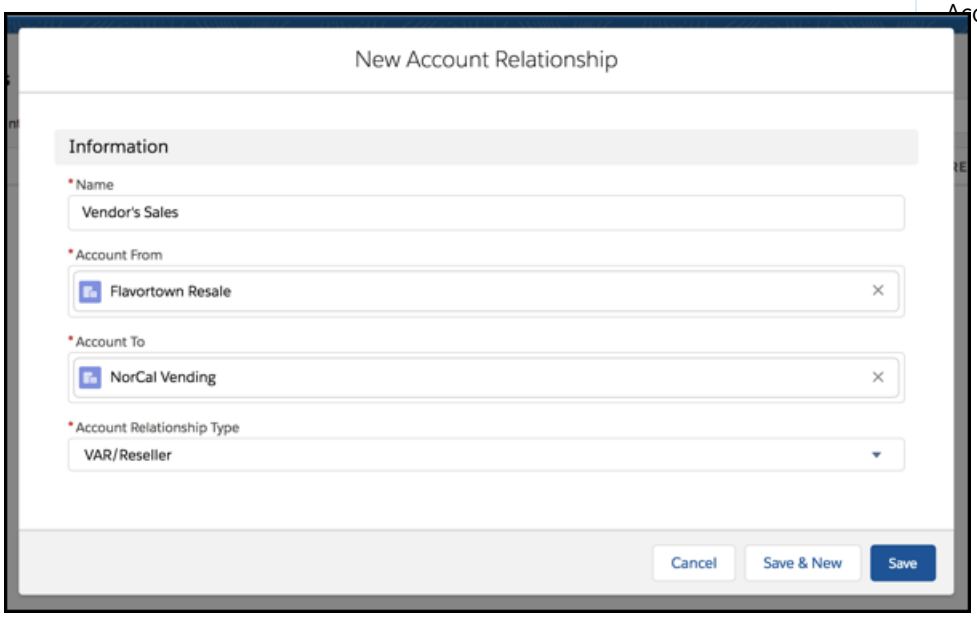
Once you've created an account relationship data sharing rule, assign it to an account relationship to begin sharing.

Partner Community or Customer Community Plus licenses are required to access Account Relationships.

With **Enable Account Relationship** turned on, the Account Relationship tab becomes available.

1. To view the accounts that are sharing data, add the Account To and Account From related lists to your page layouts.
2. Go to a partner account, scroll to the **Account Relationship** related list, and click **New** to create an account relationship.

Example: Enter the name of the account gaining access (Account From), the account giving access (the Account To), and the type of relationship they share (Account RelationshipType).



The following fields determine who uses the data sharing rule:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and manage Account Relationships:
Create and Set Up Communities

AND

You must be a member of the community

Field Name	Description
`Name`	The name of the account relationship. We suggest including both account names and the type of relationship they have. For example, *`Reseller - FlavorTown and Norcal`*.
`Account From`	The account that is gaining access to another account's data.
`Account To`	The account that is giving access to their records to another account.
`Account Relationship Type`	This field defines the type of sharing rule this account relationship has access to. It is the field that associates the account relationship to the account relationship sharing rule. If the Account Relationship Type picklist value that you need is not available, go back to **Account Relationship Data Sharing Rules Settings** and create a rule with that value.

View Shared Account Records in Your Partner Community

Once an account relationship data sharing rule is in effect, the shared information filters into the object list view of the account gaining access (Account From).

Partner Community or Customer Community Plus licenses are required to access Account Relationships and Account Relationship Data Sharing Rules.

To display this information in your partner community:

- Go to **Community Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item** and enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

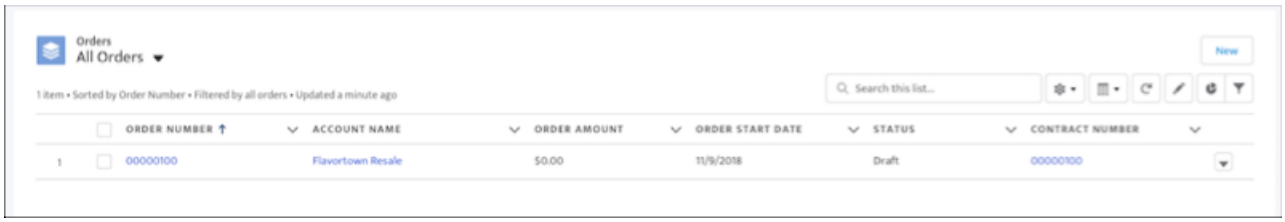
1. Create a list view for the shared object with the appropriate filters and give it a recognizable name, such as *`All Orders`*.
2. Go to **Community Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item**.
3. Enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

EDITIONS

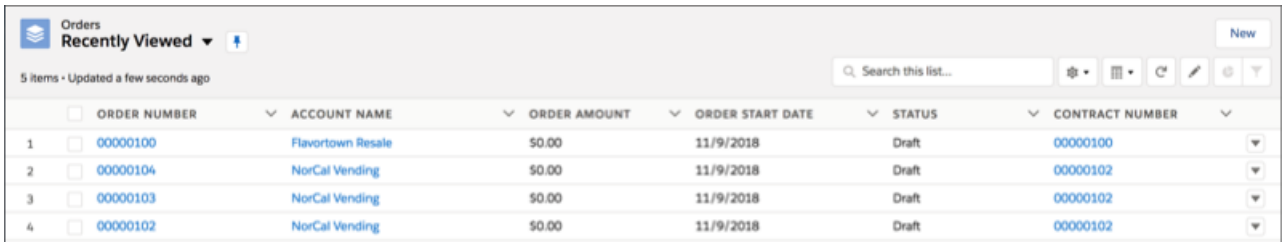
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: Before a partner account relationship was created, Flavortown Resale didn't have access to NorCal Vendings orders



Once the rule is applied, the orders that NorCal Vending shares with Flavortown Resale appear under Flavortown Resale's All Orders list view.



Create Reports for Account Relationships

Create a custom report using the Account Relationship object to track your account relationships. Once you've created the report, share your information in a dashboard.

Partner Community or Customer Community Plus licenses are required to access Account Relationship Data Sharing Rules.

1. Create a custom report type. Select **Account Relationships** as the primary object.
2. Build your report and save it.
3. Share the report on a dashboard.

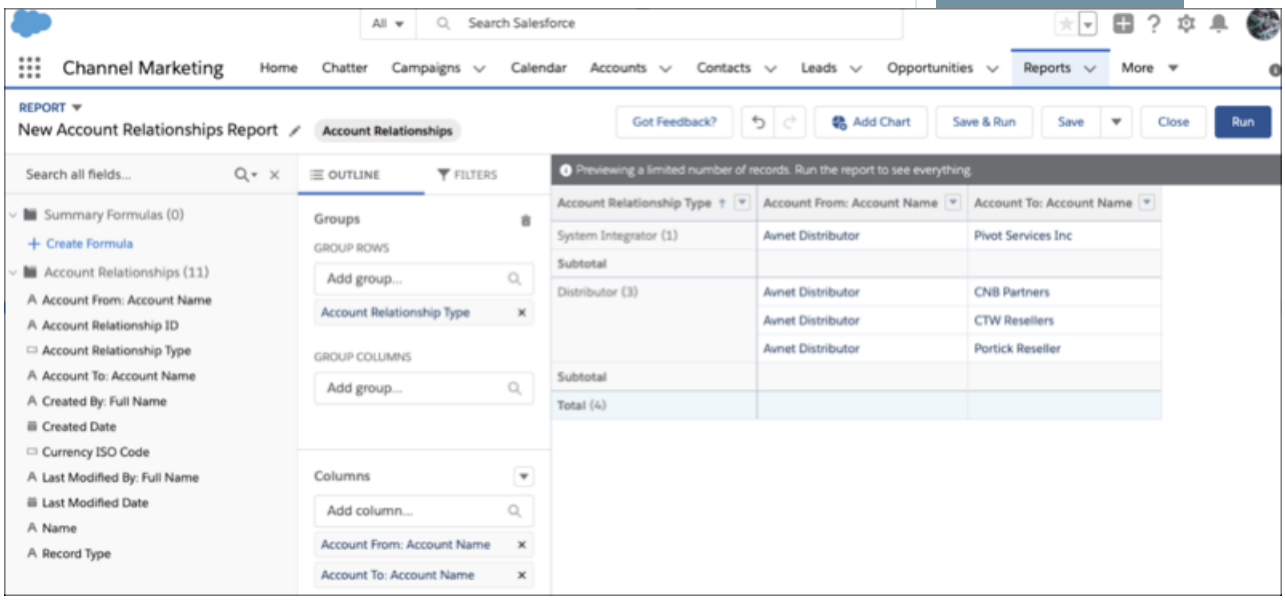
Example: Once you've created a custom report type using the Account Relationship object, you can build your report to fit your needs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS



Considerations When Using Partner Account Relationships and Data Sharing Rules

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

There are a few important things to keep in mind when you use Account Relationships or Account Relationship Data Sharing Rules.

- Account Relationship *sharing rules* follow our standard sharing rule procedures and are not the same as the Account Relationship Data Sharing Rule feature. Sharing rules allow you to provide visibility to objects. Account relationship data sharing rules share specific records with a partner account based on their relationship. Deferred Account Relationship sharing rules don't affect Account Relationship Data Sharing Rules.
- Account Relationship Types are dynamic picklist values. If the value you need is not available, go to **Setup**, open the Object Manager tab, and enter `Account Relationship` in the quick find box. Click **Account Relationship** > **Fields & Relationships** > **Account Relationship Type** and select **New** under AccountRelationshipType Picklist Values. You can also customize an existing value. You can't replace, delete, or deactivate an Account Relationship Type picklist value used in an Account Relationship or Account Relationship Data Sharing Rule.
- After an account relationship is saved, only its name can be updated. To make further changes, delete the account relationship and create a new one.
- Only one sharing rule can contain the same Account Relationship Type and Object Type field values. For example, you can only have one sharing rule that combines the Lead.OwnerId Object Type field value and "Distributor" Account Relationship Type field value.
- Data owned by Customer Community users or Customer Community Login users can't be shared via account relationship data sharing rules.
- An account that is part of an account relationship can't be deleted or merged.
- If sharing is not enabled for orders, then you can't create account relationship data sharing rules for them.
- Unmanaged packages with Namespace enabled can't contain Account Relationship Data Sharing Rules that include custom objects.

Lead Distribution and Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce Communities provides an incredibly robust and flexible set of tools to manage both inbound and outbound leads. Use Partner Central to implement lead distribution, lead monitoring, and deal registration with a few clicks of a button.

Lead distribution is the practice of managing and maturing both inbound and outbound sales leads with channel partners who are selling on your behalf. Many companies sell their products through partners. With the lead distribution process, companies source leads and pass them to their partners for follow-up and sales. Lead distribution is also known as lead pass.

Other companies rely on their partners to source leads and register them with the company. This process is known as deal registration. The channel manager checks in the Salesforce org to make sure that the submitted lead does not create channel conflict with other partners.

IN THIS SECTION:

Assign Leads to Partners
You can assign leads to partners or allow partners to drive their own lead queue.

Configure Lead Distribution in Partner Central
Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners in a partner community using the lead inbox.

Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Assign Leads to Partners

You can assign leads to partners or allow partners to drive their own lead queue.

You can:

- **Directly assign leads**: Assign each lead to an individual partner user.
- **Configure lead distribution**: Assign leads to a lead queue and allow partner users to claim leads from the queue. The native Partner Central community template provides the lead inbox component that you can use to pass leads to partners. Use lead assignment rules to automatically assign leads to partner users or queues based on certain properties of those leads.

  Note: User actions in a community don't trigger assignment rules.

- **Configure deal registration**: Allow partners to submit qualified or mature leads to get ahead of competitors.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the community's Leads page or tab. The partner user can see leads by selecting the appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign leads to partner users:

- Edit on leads

Configure Lead Distribution in Partner Central

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners in a partner community using the lead inbox.

While companies can choose to configure lead distribution in multiple ways, one approach is to create a shared queue and list view of leads, and use assignment rules to automatically pass leads to partners in the lead inbox. Use Salesforce CRM capabilities such as lead page layouts, lead record types, and assignment rules to automate the process. Partner users can accept the leads they're assigned from the lead inbox in the partner community.

Configure lead distribution for your partner community for:

- Automated routing of company-sourced leads to channel partners
- Criteria-based lead assignment
- Increased likelihood of lead conversion
- Automated handling of dead or dormant leads

Configuring lead distribution for your Partner Central community involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your community.

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a process called Lead Distribution and define the statuses that the lead can be in. When you select status values for a process, think of all the stages a lead goes through in the process.

Tip: To use more values than the master process record provides, customize the Lead Status picklist values for leads before you create the lead process.

1. From Setup, enter `Processes` in the Quick Find box.
2. To create a lead process, such as for lead distribution, select **Lead Processes**.
3. Select the stages best suited to the lead and your business needs.
4. Save the process.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your community.

1. From Setup, enter *Queues* in the Quick Find box, then select **Queues**.
2. Create a queue to queue leads for the lead inbox. Let's call this Lead Inbox Queue or an intuitive name of your choice.
3. On the queue detail page, under Queue Members, add the partner users you want to pass leads to. You can set the visibility settings by profiles, roles, or users.
4. Save the queue, which also creates a list view by the same name.
5. Next, go to the Leads object home in your org. From the Views drop-down list, select the list view with the same name as the queue and edit the list view.

   Note: You can't edit list views in Lightning Experience.

6. In the Step 4: Restrict Visibility section, set visibility preferences. For example, to share the queue with all partners, search by and share the list view with the All Partner Users group and save.

In Partner Central communities, you can select this list view to display in the lead inbox in your community. You can create and share multiple queues and the corresponding list views with partner users. Partner users with permissions to access leads, queues, and the corresponding list views can see all lead list views and switch between them.

SEE ALSO:

Create Queues

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and change queues:
- Customize Application

  AND

  Manage Public List Views

To change lead list view visibility:
- Read on leads

  AND

  Create and Customize List Views

To create, edit, or delete public list views:
- Manage Public List Views

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create two page layouts: one for the channel manager and partner profiles in your partner community.

1. From Setup, enter *Leads* in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the master lead layout. Let's call this **Lead Distribution - <User Profile>**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers see more data than partner users.
4. Save the page layout.
5. Repeat for channel manager profiles.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:
- Customize Application

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Note: Creating a lead record type requires a lead process and a lead page layout.

Lead distribution is used for managing outbound leads that your company passes to your partners. Deal registration, on the other hand, allows partners to submit leads early on so they can get ahead of their competition. Both channel managers and partner users see both lead record types, but channel managers typically require more visibility and control over the data. Define lead page layouts with both channel managers and partner users needs in mind. You can assign page layouts to profiles for each lead record type you create.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Leads` in the Quick Find box, then select **Record Types** under Leads.
2. Create a record type to track leads you pass to partners for lead distribution. Let's call this **Sales Lead**.

   For deal registration, create a separate record type called **Deal Registration**.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your community.
4. Assign page layouts for the partner and channel manager profiles.
5. Edit the picklist values for the Lead Source record type. Include values that let you track inbound leads from deal registration (from partners) separately from outbound sales leads (passed to partners).

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

For lead distribution, use assignment rules to define the criteria by which you want to distribute your leads, such as partner tier, geography, or specialization.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Leads` in the Quick Find box, then select **Lead Assignment Rules**.
2. Create a lead assignment rule, let's call this All Channel Sales Leads.
3. Create rules to filter leads by record field values or user criteria and assign them to the lead inbox queue.

   You can also create rules to directly assign leads to partner users.
4. To send an email notification when a lead is assigned to the queue, select an email template.

   You can also create custom templates for partner email notifications.

Note: Assignment rules that run after, rather than during, lead creation can't include the Campaign field in their criteria.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

1. In your Partner Central community, go to the Home page in Community Builder.
2. Click the Lead Inbox component and select the lead list view you want to display and link to. Configure other properties in the Property Editor.
3. To save your changes, publish the community.
4. Log in as a partner to test the lead distribution process.
   - Create a few test leads that match the assignment rules for the lead queue.
   - Make sure that the leads show up in the lead inbox queue and list view.
   - Accept a lead. Accepting a lead makes the partner the owner of the lead.
   - Verify that the lead shows up in the partners list view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Configure deal registration to:

- Automate the submission & approval process
- Increase partner competitiveness and participation
- Provide incentives to partners for leads they convert quickly
- Get early visibility into your pipeline
- Manage channel conflict
- Monitor channel revenues both within your community and in Salesforce

Here's a summary of how to configure deal registration in your Partner Central community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Create Processes for Deal Registration

A process allows you to define or customize the stages in the sales process for leads or opportunities.

Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in communities. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

Create a Global Action to Let Partners Register Deals

Create a global action to allow partners to register deals from communities. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

Customize Opportunities for Deal Registration

Create an opportunity process, page layout, and record type, similar to leads.

Create Approval Workflows for Deal Registration

Approval workflows are unique to each organization's sales needs and business processes.

Customize Partner Central for Deal Registration

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

Create Processes for Deal Registration

A process allows you to define or customize the stages in the sales process for leads or opportunities.

When you select status values for a process, think of all the stages a lead or an opportunity goes through. For example, for deal registration, the Lead Status values could be New, Submitted, Approved, Rejected.

Create a process for leads. Create a separate process for opportunities.

Tip: To use more values than the master process record provides, customize the Lead Status picklist values for leads before you create the lead process. Also, add the Deal Registration to the Lead Source picklist values.

1. From Setup, enter *Processes* in the Quick Find box.
2. To create a process for leads, select **Lead Processes**. To create a process for opportunities, select **Sales Process** under Opportunities.
3. Select the stages best suited to the lead or opportunity and your business needs.
4. Save the process.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create two page layouts: one for the channel manager and partner profiles in your partner community.

1. From Setup, enter *Leads* in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the master lead layout. Let's call this **Deal Registration - <User Profile>**, or specifically, Deal Registration - Partner Users.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for.

   Tip:
   - Extend the Lead Source picklist values to indicate which leads are submitted by partners as deals.
   - Add a custom, auto-numbering field called `Deal ID` to both partner and channel manager page layouts. You can use this field value as a separate identifier for deals, in both leads and opportunities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:
- Customize Application

4. Save the page layout.
5. Repeat for channel manager profiles.

Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in communities. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

Note: Creating a lead record type requires you to associate it with a lead process and allow you to specify page layouts to be used with different profiles. Similarly, creating an opportunity record type requires you to provide a sales process and opportunity page layouts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter *Record Types* in the Quick Find box, then select **Record Types** under Leads. To create an opportunity record, select **Record Types** under Opportunities.
2. Create a lead record type to track registered deals called **Registered Deal**. If you're creating an opportunity record type, create one for registered deals as well.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your community.
4. Assign page layouts for the partner and channel manager profiles.
5. If you haven't already, edit the picklist values for the Lead Source field to include a value for registered deals.

If this is the first time you're setting up a deal registration process for your company, consider converting existing leads to the generic sales lead record type. Using separate record types for standard leads versus registered deals simplifies the reporting process.

Create a Global Action to Let Partners Register Deals

Create a global action to allow partners to register deals from communities. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter *Global Actions* in the Quick Find box, then select **Global Actions**.
2. Create a global action, select **Lead** as the target object, and the record type for the deal registration process.
3. Select or specify an appropriate label for the global action. This label displays in the Create button menu in your community.
4. Fill out the other details and save the global action.
5. Customize the fields in the global action layout, based on the information you want your partners to submit for each deal.

Tip: Use a Lead Source value to indicate that the lead has been captured from the Deal Registration process.

Customize Opportunities for Deal Registration

Create an opportunity process, page layout, and record type, similar to leads.

Many companies create separate sales processes for their direct and indirect sales opportunities. Some companies prefer to expose a shorter list of opportunity stage values that are less granular compared to stages used by their direct sales team.

1. Create an opportunity process.
2. Create two opportunity page layouts, one for partner users and one for channel managers.
3. Create an opportunity record type to track registered deals, different from the opportunity record type you use to track direct sales opportunities.

   Tip:

   - Many companies struggle with how to report on channel versus internal sales. Using separate record types to categorize opportunities by who is working on them—internal sales teams or partners—allows you to report on direct and channel sales separately.
   - Make this opportunity record type the default for partner users. This ensures they see the same record type when the opportunity is converted, regardless of who does the conversion.
   - Add the Deal Registration value to the Lead Source picklist values for the opportunity record type.

4. Map any custom fields on the lead record type to the opportunity record type for deal registration.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create Approval Workflows for Deal Registration

Approval workflows are unique to each organization's sales needs and business processes.

Approval workflows should account for how you want to route submitted deals, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen leads by record type and submit all registered deals for approval.
- **On Submission**: Identify what field values change on the lead record on submission, for example the lead status. Decide if the lead record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted lead to be considered for deal registration. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted deal to. Typically, this is the channel manager. Decide what happens on approval.
  - Change the Lead Status to approved.
  - Convert the lead to an opportunity.
  - Send an email notification to the partner user.
  - Set a deal expiration date and save the deal approval date for reporting.
  - Extend any margins or discounts that you might offer to the partner on successful closure.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

- **Rejection**: Decide what criteria disqualify a lead. Set the Lead Status to rejected. Send an email notification to inform them of the rejection. Unlock the lead record so partners can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

Customize Partner Central for Deal Registration

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

1. In your Partner Central community, go to the Home page in Community Builder.
2. Click the **Quick Create** component and add another global action. By default, a New Account action is added. Click it and select the global action you created for partners to register deals.
3. To save your changes, publish the community.
4. Log in as a partner to test the deal registration process.
   - Submit a couple registered deals from the Quick Create button.
   - In a different browser, log in to see if the approval workflows are working. Approve or reject a deal.
   - Back in the community, check the lead and deal list views as partner.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Market Development Funds

Drive demand for your products and provide incentives to partner users by offering market development funds as part of your channel marketing program. Create marketing budgets, allocate marketing funds or co-op (accrued) funds to channel partners, streamline fund requests, and process fund claims using Market Development Fund (MDF) features. Channel account managers can get a full audit of MDF activity, including fund requests and claims approval.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

With Market Development Fund features, you can:

- Create marketing budgets
- Allocate marketing funds or co-op (accrued) funds to channel partners
- Streamline fund requests
- Process fund claims

Note: Setting up Market Development Funds is easy, using Guided Setup. Click **Community Workspaces** > **Guided Setup** > **Market Development Fund**.

The Market Development Fund reports, available in the guided setup, make it easy to understand partner adoption, funds usage, and marketing ROI. Market Development Funds is available out-of-the-box for partner communities. We created a Budget custom report type for you. If you want to view information about allocations, requests, or claims, you need to create report types for those objects and make sure your partners have read access to them as well.

IN THIS SECTION:

Create a Market Development Budget
Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

Configure Market Development Budgets
Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Create a Partner Fund Allocation
Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

Configure Partner Fund Allocations
Configure partner fund allocation for your partner community to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Create a Partner Fund Request
Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

Configure Partner Fund Requests
Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Create a Partner Fund Claim
Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

Configure Partner Fund Claims
Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Create a Market Development Budget

Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

If you have a Partner License and have enabled Communities, the Market Development Fund objects are available in your org.

1. Click the App Launcher and enter `Budget` in the Find an app or item box.
2. Select **Partner Marketing Budget**.
3. Click **New** and enter the name, type, amount, and start and end dates.
4. Save the budget.

Select **Ignore Validation** to bypass validation criteria and allow more flexibility to how budgets are allocated, claimed, and requested. Once Ignore Validation is selected for a budget, it can't be reversed.

You can update allocations, claims, and requests for this budget. The updated values must be associated with a budget that has the same validation status as this one.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create budget
- Create on budget

To update budget
- Update on budget

Configure Market Development Budgets

Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Configuring partner marketing budgets for your Partner Central community involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize Page Layouts for Partner Marketing Budgets
Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update budgets. The company may not want partner users to have access to budgets.

Grant Channel Account Managers Access to Partner Marketing Budgets
Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

Share Partner Marketing Budgets with the Channel Account Manager
Create a sharing rule that gives channel account managers access to budgets.

Create Approval Workflows for Partner Marketing Budgets
Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Marketing Budgets

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update budgets. The company may not want partner users to have access to budgets.

Create a partner marketing budget page layout for the channel account manager (CAM).

1. From Setup, enter `Budget` in the Quick Find box, then select **Page Layouts** under Partner Marketing Budget.
2. Create a Partner Marketing Budget page layout for channel account managers by cloning the master partner marketing budget layout. Let's call this **Marketing Budget - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update budgets.
4. Save the page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Grant Channel Account Managers Access to Partner Marketing Budgets

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

1. From Setup, enter *Permission* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Share Partner Marketing Budgets with the Channel Account Manager

Create a sharing rule that gives channel account managers access to budgets.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

Create a sharing rule that grants budget access to internal users.

1. From Setup, enter *Sharing* in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Marketing Budget Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules
- Manage Sharing

Create Approval Workflows for Partner Marketing Budgets

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted budgets, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you wish to send notifications for.
- **Routing**: Screen budgets by record type and submit all budgets for approval.
- **On Submission**: Identify what field values change on the budget on submission, for example the budget status. Decide if the budget record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted budget to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted budget to. Typically, this is an internal user. Decide what happens on approval.
  - Send an email notification to the channel account manager.
  - Set a budget expiration date and save the budget approval date for reporting.
- **Rejection**: Decide what criteria disqualify a budget. Send an email notification to inform them of the rejection. Unlock the budget record so channel account managers can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create a Partner Fund Allocation

Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

1. Click the App Launcher and enter `Allocation` in the Find an app or item box.
2. Select **Fund Allocation**.
3. Click **New** and enter the name, budget, channel partner, and amount.
4. Save the allocation.

Allocations can be updated. The budget associated with the updated allocation must have the same validation status as the original.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create allocations
- Create on allocations

To update allocations
- Update on allocations

Configure Partner Fund Allocations

Configure partner fund allocation for your partner community to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Configuring partner fund allocations for your Partner Central community involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize Page Layouts for Partner Fund Allocations
Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update allocations, but the company may not wish to expose some information about allocations to partner users.

Grant CAMs Access to Partner Fund Allocations
Create a permission set to grant channel account manager permissions on Partner Fund Allocations.

Share Partner Fund Allocations with the CAM
Create two sharing rules: one for the channel account manager (CAM) and one for the partner user.

Customize Page Layouts for Partner Fund Allocations

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update allocations, but the company may not wish to expose some information about allocations to partner users.

Create a marketing fund allocation page layout for the channel account manager.

1. From Setup, enter `Allocation` in the Quick Find box, then select **Page Layouts** under Partner Fund Allocation.
2. Create a Partner Fund Allocation page layout for channel account managers by cloning the master partner fund allocation layout. Let's call this **Marketing Fund Allocation - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update fund allocations.
4. Save the page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Grant CAMs Access to Partner Fund Allocations

Create a permission set to grant channel account manager permissions on Partner Fund Allocations.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Fund Allocations.

1. From Setup, enter *Permission* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Share Partner Fund Allocations with the CAM

Create two sharing rules: one for the channel account manager (CAM) and one for the partner user.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

Create two sharing rules to grant the appropriate access to partner fund allocations for channel account managers and partner users.

1. From Setup, enter *Sharing* in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Fund Allocations Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.
5. Create a sharing rule for your partner users as well.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules
- Manage Sharing

Create a Partner Fund Request

Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

If you have a Partner License and have enabled Communities, the Market Development Fund objects are available in your org.

1. Click the App Launcher and enter `Request` in the Find an app or item box.
2. Select **Fund Requests**.
3. Click **New** and enter the name, channel partner, requested amount, and status.
4. Save the fund request.

Requests can be updated. The budget associated with the updated request must have the same validation status as the original.

Tip: You can create an approval workflow for partners to submit fund requests to the channel account manager. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Request object is set to Read-only.

Note: We've created the **Total Approved Fund Requests** field for you. This formula field is automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create fund request
- Create on fund request

To update fund request
- Update on fund request

To delete fund request
- Delete on fund request

Configure Partner Fund Requests

Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Configuring market fund requests for your Partner Central community involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Grant Channel Account Managers and Partner Users Access to Partner Fund Requests

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve fund requests. Create another permission set for your partner users so they can submit fund requests.

Create Approval Workflows for Partner Fund Requests

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Fund Requests

Page layouts control field visibility and behavior for different types of users. Partner users submit fund requests and channel account managers approve them.

Grant Channel Account Managers and Partner Users Access to Partner Fund Requests

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve fund requests. Create another permission set for your partner users so they can submit fund requests.

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Requests to the channel manager. Grant channel partner users Create, Update, and Read on Fund Requests.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create Approval Workflows for Partner Fund Requests

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund requests, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund request by record type and submit all fund requests for approval.
- **On Submission**: Identify what field values change on the field request on submission, for example the fund request status. Decide if the fund request record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted request to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted fund request to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Request Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund request. Set the Fund Request Status to rejected. Send an email notification to inform them of the rejection. Unlock the fund request record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Page Layouts for Partner Fund Requests

Page layouts control field visibility and behavior for different types of users. Partner users submit fund requests and channel account managers approve them.

Create two partner fund request page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Request` in the Quick Find box, then select **Page Layouts** under Partner Fund Request.
2. Create a Partner Fund Request page layout for channel account managers by cloning the master partner fund request layout. Let's call this **Marketing Fund Request- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Create a Partner Fund Claim

Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

If you have a Partner License and have enabled Communities, Market Development Fund objects are available in your org.

Tip: Create a separate permission set for the channel account manager (CAM) or financial department to manage and approve fund claims. Partner users only need Create, Update, and Read permissions to submit a fund claim.

1. Click the App Launcher and enter `Claim` in the Find an app or item box.
2. Select **Fund Claim**.
3. Click **New** and enter the name, request, amount, and status of the claim.
4. Save the claim.

Claims can be updated. The budget associated with the updated claim must have the same validation status as the original.

Tip: You can create an approval workflow for partners to submit fund claims for reimbursement by the channel account manager or financial department. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Claim object is set to Read-only.

Note: We've created the **Total Approved Fund Claims** and **Total Reimbursed Fund Claims** fields for you. These formula fields are automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create claims
- Create on claims

To update claims
- Update on claims

Configure Partner Fund Claims

Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Configuring market fund claims for your Partner Central community involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims
Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create Approval Workflows for Partner Fund Claims
Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Fund Claims
Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Claims to the channel manager. Grant channel partner users Create, Update, and Read on Fund Claims.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Claims.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create Approval Workflows for Partner Fund Claims

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund claims, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund claims by record type and submit all fund claims for approval.
- **On Submission**: Identify what field values change on the field claim on submission, for example the fund claim status. Decide if the fund claim record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted claim to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted claim to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Claim Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund claim. Set the Fund Claim Status to rejected. Send an email notification to inform them of the rejection. Unlock the claim record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Page Layouts for Partner Fund Claims

Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Create two partner fund claim page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Claim` in the Quick Find box, then select **Page Layouts** under Partner Fund Claim.
2. Create a partner fund claim page layout for channel account managers by cloning the master partner fund claim layout. Let's call this **Marketing Fund Claim- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund claims, but don't approve them.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Reach More Customers with Channel Marketing

Create seamless marketing campaigns for partner user with channel marketing tools for partner communities.

SEE ALSO:

- Set Up Campaign Marketplace
- Partner Community Cloud Implementation

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. 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. This feature is available in Lightning communities and Lightning Bolt Solutions.

Enable your channel marketers to promote pre-approved campaigns. Let partners browse, signup for, and run campaigns in just a couple of easy steps. When a partner clicks **Sign Up** on a campaign they want to run, a child campaign record is created from the original campaign. Partners can access all assets associated with the campaign and customize it to fit their brand. You must have a Partner Community license or use Distributed Marketing to use Campaign Marketplace.

Note: We recommend that you define your campaign hierarchy before completing these steps. Think about how you can organize your campaign hierarchy to optimize reporting on campaigns. You can organize them by channel programs and levels or you can organize them by region.

1. Go to **Customize** > **Campaigns** > **Page Layouts**.
2. Create 2 channel marketing page layouts: one for the channel marketer and one for the partner profiles in your partner community.
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.
6. Configure your campaign marketplace in Community Builder.

Example: Campaign Marketplace

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

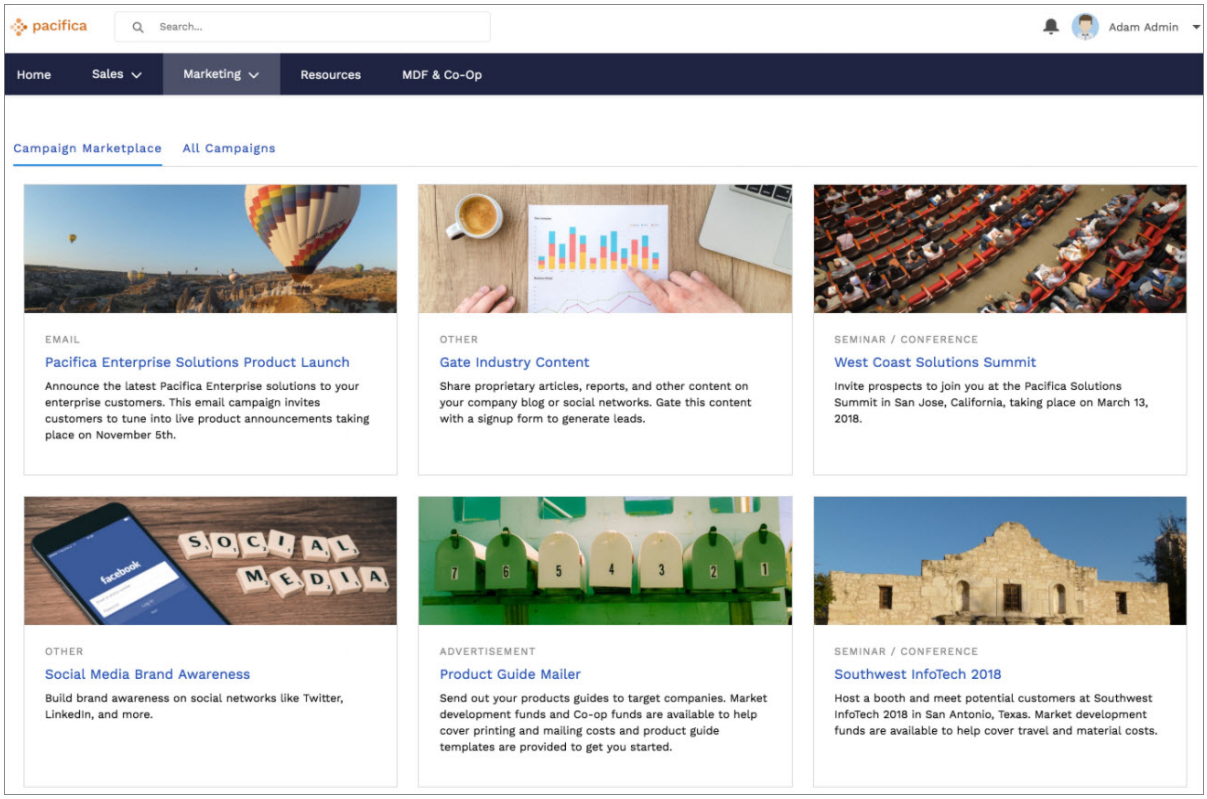
USER PERMISSIONS

To create campaigns.
- "Create on Campaigns"

To read campaigns and use Campaign Marketplace.
- "Read on Campaigns"

To edit campaigns.
- "Edit on Campaigns"

To create or customize page layouts and record types.
- "Customize Application"



Add filters to your list view to create different categories, such as Recommended and High ROI. Create multiple categories, and display them as tabs to make it easier for partners to search for the campaigns they need. You can also add a custom image to your campaign with the new campaign image field.

SEE ALSO:

- Best Practices for Campaign Marketplace
- Campaign Marketplace
- Partner Community Cloud Implementation

Best Practices for Campaign Marketplace

Looking for best practices and use cases to help you get the most out of Campaign Marketplace? You've come to the right place.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Highlighting a Custom Field

Channel managers can use Highlights to call out certain types of campaigns. Create a custom formula field for greater flexibility when choosing types of fields to highlight.

For example, you can create a custom formula text field called "Recently Added". Enter the following formula in the "Simple Formula" box:

```
IF((TODAY() - 7) < DATEVALUE(CreatedDate), "RECENTLY ADDED", "")
```

Add the "Recently Added" field to the columns in the list view you are using in your marketplace.

Under **Highlights**, select the "Recently Added" field and choose the color you want to highlight recently added campaigns.

Managing Visibility of Campaigns Using List Views

Channel managers can configure components to manage how campaigns are displayed to partners.

- Use filters to control visibility for campaigns. By default, we only show campaigns that are active and within the start and end of their date range. You can use activation or the start and end date to control visibility. Optionally add an approval process and a custom "approved" field on campaigns to control the visibility in the list view.
- Provide different types of marketplaces to partners. Add multiple marketplaces, with different list views, to different regions on a page or using the tab component.
- Hide partner-owned campaigns from the marketplace without using a trigger. You can filter the campaign list view using Owner User Type. You can also add a custom checkbox field to the campaign and set the default to "false". Make sure the field is read-only for the profiles that sign up for campaigns. You can then filter the list view by campaigns with the custom checkbox marked "true".

Copying Fields That Are Not on a Partner's Page Layout

When a partner signs up for a campaign, fields that are not on the partner's page layout are not copied. Use a trigger to copy fields you want to include on the child campaign when a partner signs up. These fields don't show up in the layout, but are included in the child campaign record. We recommend using this trigger:

```
trigger onSignUpCopyFields on Campaign (before insert) {  for (Campaign childCamp : System.Trigger.new) { // check if the campaign is being signed-up if (childCamp.parentId != null) { // may need to add more conditions here, depending on campaign hierarchy and usage. // read all the campaign data that might not be on the child // sign-up/clone doesn't copy the fields not on the user's page layout Campaign parentCamp = [SELECT Id, Name, Type, YourCustomFieldName__C FROM Campaign WHERE Id =: childCamp.ParentId]; YourCustomFieldName__C = parentCamp.YourCustomFieldName__C; // You can update the record directly only before insert.
```

Note: Only fields that partners have read access to are displayed.

Signing Up for a Campaign

Partner users should default their "Actual Cost in Campaign" field to null and their "Num Sent in Campaign" field to 0 before signing up for a new campaign.

SEE ALSO:

Set Up Campaign Marketplace

Campaign Marketplace

Partner Community Cloud Implementation

Set up Distributed Marketing in Partner Community Cloud for your channel partners to access campaigns using Marketing Cloud journeys and approve campaign members to receive messages.

- Ensure that your org uses My Domain.
- To access the Community Builder, in Sales or Service Cloud, navigate to **Setup**. Use Quick Find to navigate to **All Communities**. Click **Builder** for the Community you are editing.

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

Track Performance with Partner Scorecard

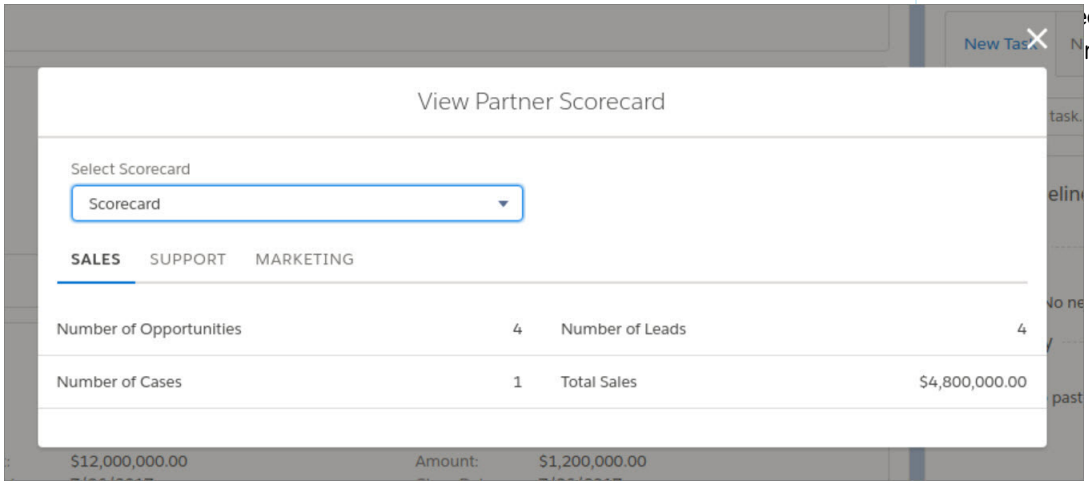
Channel account managers can measure partner users' performances and establish benchmarks for their channel programs using partner scorecards. You can customize partner scorecards to display any report summary results that your channel account manager or executive team wants to see. Add multiple scorecards to track more than one category. Partner scorecards are available in Lightning Bolt Solutions.

Partner scorecards are only available with Partner Community licenses. If you don't have access to scorecards, contact Salesforce Customer Support to enable Manage Scorecards in your org.

Add the "View scorecard" action to the account layout to display the scorecard directly on the account. Each scorecard displays admin-defined metrics that monitor partner performance. You can organize metrics into different categories, such as sales, marketing, and support. When you select the category you want each metric to belong to, the metrics sort into different tabs on your scorecard. Scorecards are built on top of Salesforce reports.

1. Go to **Scorecards**, and click **New**.
2. From Setup, enter *Scorecard Metric* and select **Fields**, to enter categories that you need and are not already included.
3. Go back to your scorecard and add metrics to it. Assign metrics to categories if you want to group them by KPIs.
4. Associate your scorecard with a program, level, or partner account. Once you've associated your scorecard with a program, level, or partner account, you can view the scorecard from that account. If you've organize different scorecards into tabs, you can click the tab to see the scorecard metrics associated with that category.

Example: Partner Scorecard for Sales



Note: Metrics are pulled from summary reports. You must have access to the reports you want to associate with scorecards. Scorecard associations are permanently deleted when an account is disabled.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage scorecards:

- Create, Edit, and Delete on Accounts

  AND

  Create, Edit, and Delete on Reports

  AND

  Create, Edit, and Delete on Scorecards

To view scorecards:

- Read on Accounts

  AND

  Read on Reports

  AND

  Read on Scorecards

ecard metrics:
rts

See Configure Reports for Partner Scorecard for more information about setting up metrics for scorecards.

SEE ALSO:

Configure Reports for Partner Scorecard

Design the Field Layout for Reports Created From Your Custom Report Type

Build a Report

Configure Reports for Partner Scorecard

Assigning metrics to a Partner Scorecard is easy, but it's important to correctly configure the reports. Follow these tips to display accurate information in your scorecard.

Here are a few things to keep in mind regarding the reports that you associate with your partner scorecard:

- Scorecards do not support report types on Account. To display data about objects that are related to Accounts, use a report type associated with a supported object or create a custom report type that includes both Account and a supported object.
- Each Metric is pulled from a summary field of a report. For a report to work with scorecards, it can have a maximum of one summary field in addition to the row count. The summary value is what is displayed on your scorecard. Your metric must be associated with a summary report or the data does not display correctly.
- You must have read access on all reports that you want to associate and view with scorecards.
- If an account is disabled, scorecards associated that account are permanently deleted.
- Account ID fields must be available on the report. The Scorecard component dynamically filters reports to the current Partner Account.

The following table displays information about which objects Scorecards support and how to set up reports for them.

Object	Report Type	Actions to Take
Opportunity	Standard	Set Field Level Security of Partner Account to Visible for all profiles of users viewing scorecards.
Opportunity	Custom	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Lead	Standard	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, and delete reports in private folders:

- Create and Customize Reports

To create, edit, and delete reports in public and private folders:

- Report Builder OR Report Builder (Lightning Experience)

Object	Report Type	Actions to Take
Lead	Custom	Set Field Level Security of "Partner Account" to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Case	Standard	No Action Necessary. Case Contact Account Id assumed to be Partner Account ID.
Case	Custom	Add the Case Contact's Account Id field to the report type layout
Partner Fund Allocation	Standard	No standard report types exist for this object.
Partner Fund Allocation	Custom	Add the Channel Partner Account ID field to the report type layout.
Partner Fund Request	Standard	No standard report types exist for this object.
Partner Fund Request	Custom	Add the Channel Partner Account ID field to the report type layout.
Custom Object	Standard	Add custom lookup field on Accounts. API name must be Scorecard_Account. Must use "(Custom Object) with Account" as report type.
Custom Object	Custom	Add custom lookup field on Accounts. API name must be Scorecard_Account. Add the Account ID field to the custom object layout.
Any Standard Object with an Account field and no Partner Account field	Standard	Scorecards do not support this type of report with default fields. Add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any Standard Object with an Account field and no Partner Account field	Custom	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Add Account Id to the report type layout.
Any other standard object	Standard	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API

Object	Report Type	Actions to Take
		name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any other standard object	Custom	Add a supported object to the report type, or add a custom lookup relationship field on Accounts. API name must be Scorecard_Account. Add the Account ID field to the report type layout for the custom entity

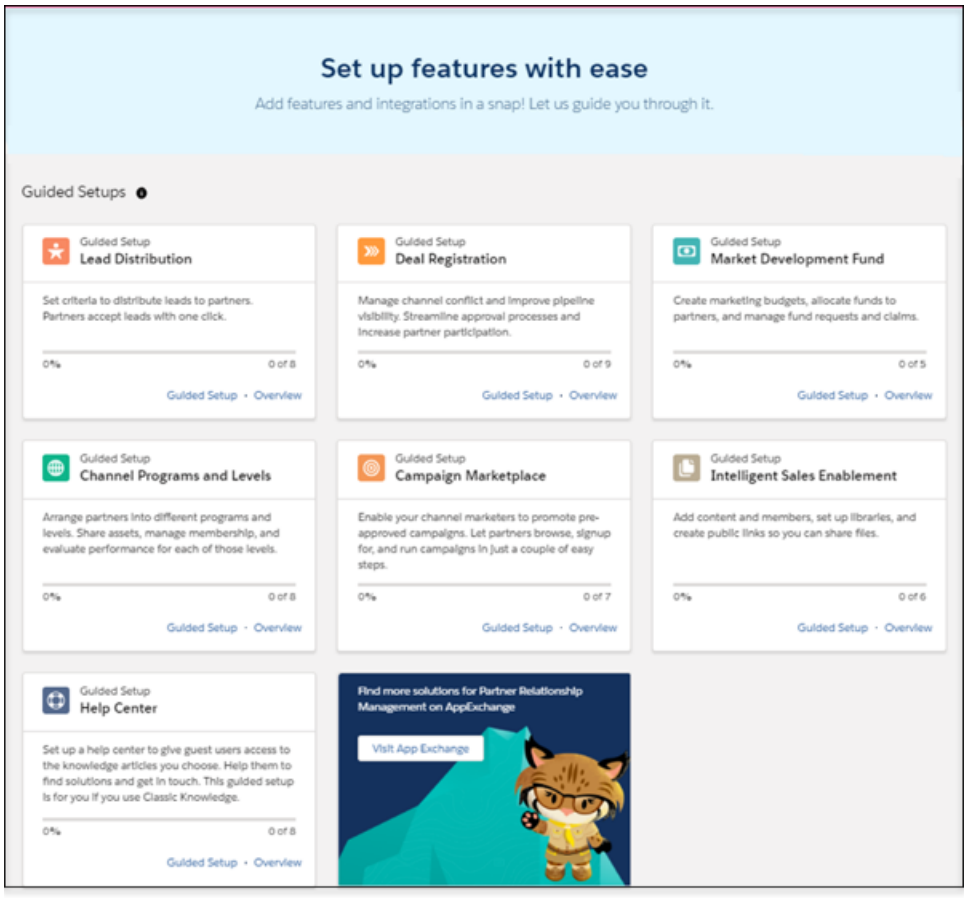
SEE ALSO:

Design the Field Layout for Reports Created From Your Custom Report Type

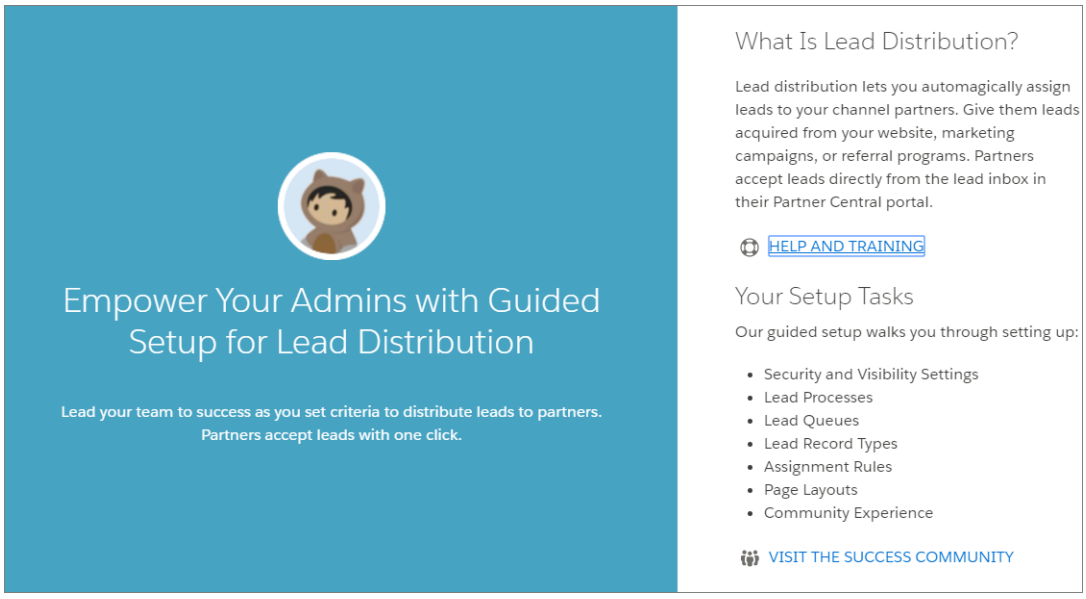
Configure Features with Guided Setup

Guided setup walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. From start to finish, guided setup leads you through each setup step with easy-to-follow directions and navigable links to setup pages.

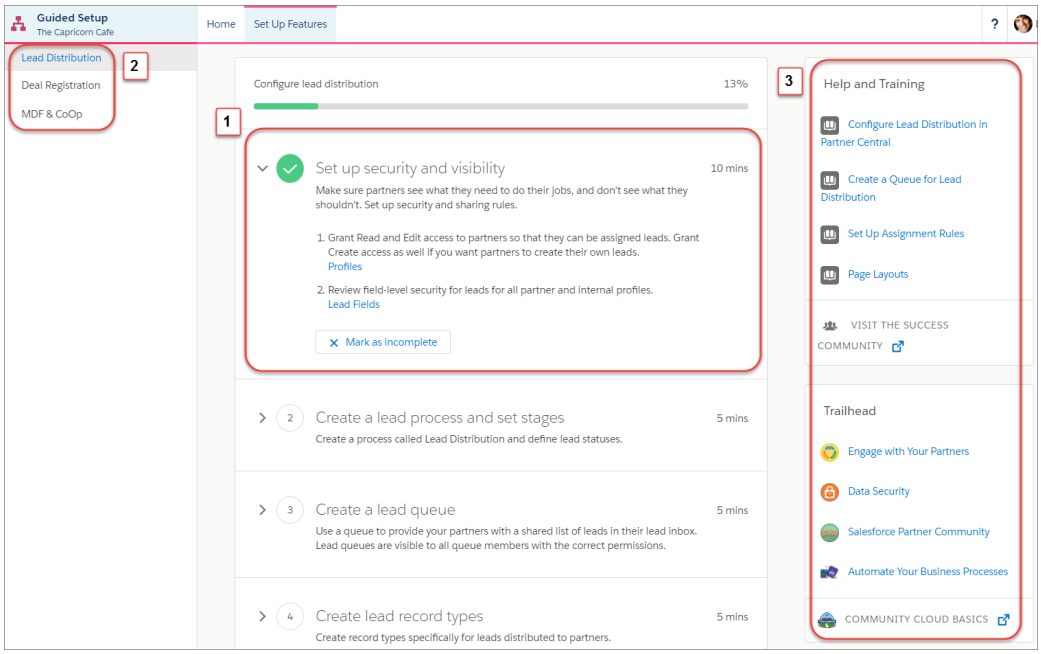
As long as you have a Partner license, you can access Guided Setup from Community Workspaces. Click the Guided Setup tile, and select which feature you want to set up.



Click **Overview** to get a description of the feature and the setup tasks.



Click **Guided Setup** to begin setting up the feature.



1. Each setup task has been organized into a separate step. Navigable links take you to the right setup pages for completing tasks. After you complete the step, you can mark that task as complete and move on to the next.
2. Not able to finish one of the setups? Or do you want to hit pause on a setup and move on to the next one? Not a problem. You can easily switch between setups from the upper left corner of the Guided Setup page. Any completed steps remain marked until you come back to them, so it's easy to find your place again.
3. Need a bit more information about a process or step? Want to learn more? Help and Training, a link to the Trailblazer Community, and related Trails are easily accessible on the right side of the screen.

Configure Guided Setup Reports

Additional configuration is required once you've installed your Guided Setup reports.

Once you've installed reports from the Guided Setup, filter values must be added to some reports. Check the filters on your reports to ensure that they are set correctly.

1. Click the App Launcher and enter `Report` in the Find an app or item box.
2. Select **Reports**.
3. Click **All Folders** and select the report folder.
4. Select the report you want to customize and click **Edit**.
5. Make any necessary changes and save.

If you want to remove any of the reports or folders from your organization, you must manually delete them.

Tip: Don't forget to also delete the custom report type for any reports that you decide to remove from your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete reports in My Personal Custom Reports folder

- Create and Customize Reports

To delete reports in public folders

- Manage Public Reports

Lead Distribution Reports

These reports are provided in the **Lead Distribution Reports** folder.

Report Name	Description	Additional Customization
Unassigned Leads	Number of unassigned partner leads.	Replace lead owner ID filter with the queue record ID.
Unassigned Leads by Age	Displays unassigned leads by age.	• Replace the lead owner ID filter with the queue record ID • Add the Lead Age formula field: ROUND(NOW()-CreatedDate, 0)
Lead Creation Trend	Number of partner leads created.	Replace the lead owner ID filter with the queue record ID
Leads by Partner	Number of leads owned by partner.	Tip: Add an age filter to Leads
Leads by Stage	Displays partner leads by stage.	N/A
Leads by Source	Displays partner leads by channel.	N/A

Report Name	Description	Additional Customization
Leads by Region	Displays partner leads by region.	N/A
Leads with No Activity	Displays partner leads with no activity by timeframe.	N/A

Deal Registration Reports

These reports are provided in the **Deal Registration Reports** folder.

Report Name	Description	Additional Customization
Number of Approved Deals by Month	Number of approved deals for current fiscal year by month.	Update the lead source and lead status filters with the correct filter values
Approved Deals by Value	Total value of approved deals.	Update lead source and lead status filters with the correct filter values
Approved to Converted Ratio	Ratio of deals approved to deals converted for the current fiscal year by partner.	N/A
Closed Deals by Partner	Displays the value closed deal registered by partners.	N/A
Deals Registered by Age	Displays registered deals by age.	Add Age custom field
Deal Registration Trend	Displays deal registration over time.	Update lead source and lead status filters with the correct filter values
Deals Expiring Soon	Displays registered deals that expire in the next 30 days.	• Update lead source filter with the correct filter value • Add Expiration date field and a filter (f.i.: Next 7 days)
Deals Pending Approval	Number of deals pending approval.	N/A
Rejected Deal	Number of deals that have been rejected.	Update lead source filter value
Converted Deals with No Activity	Number of deals registered with no partner activity in the last 14 days.	Update lead source filter value
Top Active Deals	Most valuable converted deals that have not yet been closed.	Update lead source filter value

Market Development Fund Reports

These reports are provided in the **Market Development Fund Reports** folder.

Report Name	Description	Additional Customization
Total Budget	Amount of total marketing budget.	N/A

Report Name	Description	Additional Customization
Allocated Budget	Total number of budgets allocated to partners.	N/A
Approved Fund Requests	Total approved fund requests.	N/A
Approved Claims	Total approved claims.	N/A
Paid Claims	Total paid claims.	N/A
Remaining Budget	Amount of budget available.	N/A
Remaining Allocated Funds	Amount of allocated funds available.	N/A
Fund Request Drafts	Number of fund requests in draft status.	N/A
Fund Requests by Status	Displays fund requests by approved or rejected status.	N/A
Submitted Fund Requests	Number of fund requests submitted.	N/A
Fund Requests by Activity	Number of approved fund requests by activity.	N/A
Fund Requests by Type	Number of approved fund requests by type.	N/A
Fund Claim Drafts	Number of fund claims in draft status.	N/A
Fund Claims by Status	Displays fund claims by approved or rejected status.	N/A
Funds Used vs. Allocated by Type	Displays funds used vs. funds allocated by type.	N/A
Funds Used vs. Allocated by Budget	Displays funds used vs. funds allocated by budget.	N/A
Funds Used by Partners	Displays requested funds vs. allocated funds by partner.	N/A
Leads from Campaigns	Number of leads created by campaigns funded with marketing funds.	N/A
Lead Conversion Rate	Percentage of leads converted from campaigns funded with marketing funds.	N/A
Total Sales from Campaigns	Amount of sales generated from campaigns funded with marketing funds.	N/A
Win/Loss Ratio	Won or lost ratio of opportunities from campaigns funded with marketing funds.	N/A
ROI	Total opportunities won by total funds spent.	N/A
ROI by Activity	Total opportunities won by total funds spent grouped by activity.	N/A
Average Time to Approve Request	Average number of days to approve a fund request.	N/A
Average Time to Approve Claim	Average number of days to approve a fund claim.	N/A
Average Time to Pay Claim	Average number of days to pay an approved a fund claim.	N/A

Manage Customer Relationships with the Community Cloud

Give your customers a private and secure place to access and update their account information with the Customer Account Portal solution from the Community Cloud. Improve customer relationships and decrease service costs by allowing customers to see and pay invoices. They can also update their account information and search your knowledge base for answers to their most frequently asked questions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customer Account Portal is designed with account management in mind, so you can:

- Give access to customers to create and update vital information in any Salesforce record, including custom objects. As a result, reduce call center calls for easily resolved issues, like updating a phone number or address.
- Integrate and expose data and processes from third-party systems, like ERP and e-commerce, via Salesforce Connect.
- Show customers information that matters the most in their member profile, and let them update their accounts on the fly.
- Use Salesforce Knowledge to give customers answers to their most pressing questions about your product and brand.

Customer Account Portal has the same flexibility and extensibility that you're accustomed to with other Lightning communities, so you can:

- Build custom pages and use custom branding.
- Expose more CRM objects and data that suit your business needs.
- Use audience targeting by geolocation, and create personalized content for customers by their geographical location.

Example: Here are a few industry examples of how a company can use Customer Account Portal to enhance customer relationships.

- A utilities company allows customers to check their bills and pay them online.
- An insurance company lets clients file claims online.
- A university makes it easy for students to sign up for classes online.

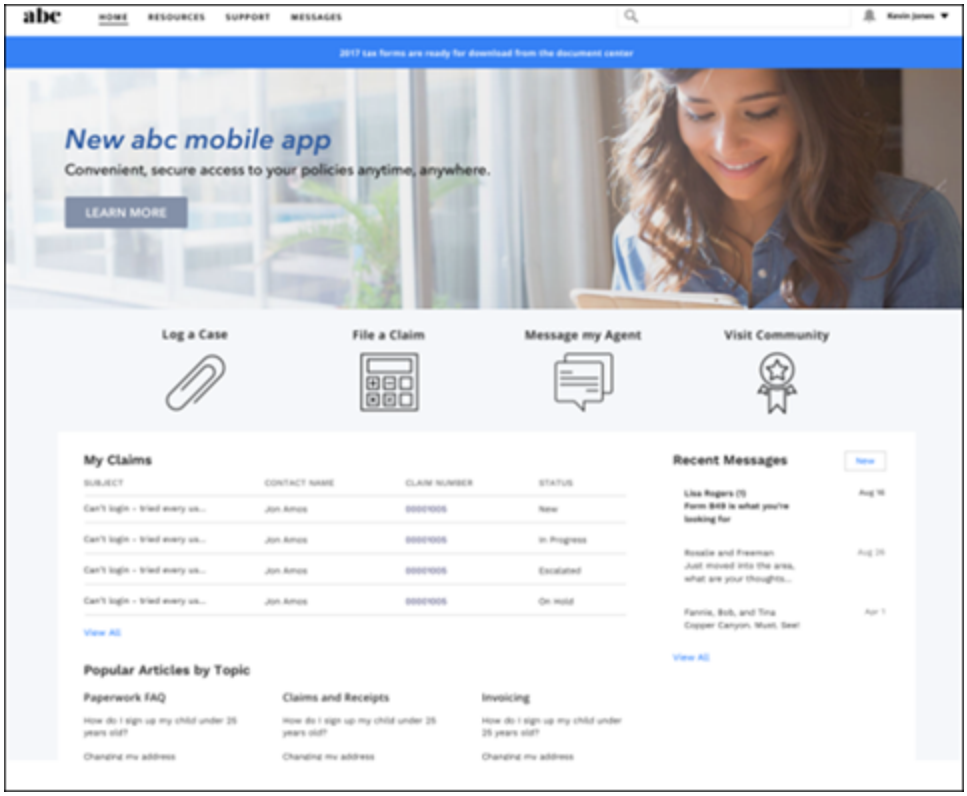
Build a Portal with the Customer Account Portal Solution

Set up a custom space where your customers can take care of their needs on their own, and reduce support calls to your company. Admins can set up Customer Account Portal with a few clicks.

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration



The Customer Account Portal comes with a variety of components out-of-the-box to make your company's portal a personalized point of access to information, processes, and experts:

- Use the Tile Menu on page 349 for an intuitive and visually stunning navigation experience.
- Configure the Member Profile on page 307 component to give customers all their account information and settings in one convenient place.
- Give access to your company's knowledge base to answer your customers' most frequently asked questions

Get started with this handy list of setup tasks to create your own customer account portal.

Create a Customer Account Portal—Setup Tasks

Review this high-level list of tasks and considerations for prepping and setting up your portal.

Planning	• What's Your Customer Account Portal Strategy? • Extend Salesforce to Customers with the Correct Licenses • Lightning Communities Limitations • Communities and Community Users in Your Salesforce Org	Prep Your Salesforce Org for a Customer Portal	• Create Communities Users • Super User Access • Delegated Administration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up a Customer Account Portal	• Update Org-Wide Settings • Check Out Community Workspaces • Create Communities • Share More Salesforce Records in Your Community	Advanced Community Features	• Community Moderation • Configure Dashboards to Monitor Your Community • Create Pages and Groups Targeted at Specific Audiences
Community Design	• Customize Your Community (Builder) • Customize Community Pages and Components (Builder) • Customize Community Navigation • Which Components Can I Use with Customer Account Portal? • Custom Theme Layouts	Community Reporting	• Community reports and dashboards • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Communities • Google Analytics™

What's Your Customer Account Portal Strategy?

The type of customer account portal you create depends on your business needs and what you want to accomplish. For example, an insurance company has a different strategy from a clothing retailer.

To get the most out of your Customer Account Portal implementation, ask yourself some questions.

- How many Customer Community licenses do I need? Do I invest in Customer Community licenses or Customer Community Plus licenses?
- What level of data visibility and privacy do I need for each object that I'm exposing to my customers?
- Which objects do I grant permissions to in my customer community profiles?
- Do I want to allow my customers to self-register?

For more ideas on planning your community strategy, check out this Trailhead module for Communities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Communities User Licenses

Extend Salesforce to Customers with the Correct Licenses

Buy customer licenses to enable customer-specific functionality in your org. Customer licenses are required to give access to the Customer Account Portal and set up customer users.

When you buy customer licenses, the following functionality is enabled in your org.

- The default Customer Community profile. You can clone it to create custom customer profiles or extend data access via permissions sets.
- The **Enable as Customer User** button on contacts.
- Access to delegated admin, reports and dashboards, and advanced sharing for customer users.

Check out Communities and Community Users in Your Salesforce Org, a quick video about how communities live in an org, the differences between community licenses, and how Salesforce accounts and community users are associated with one another.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Give Customers Access to Your Knowledge Base Through Help Center

A help center is a public-access, self-service community that makes it easy for people to find answers for themselves. Instead of filing cases through customer support, visitors find the information they need from the articles that you make available from your knowledge base. You reduce the load on your customer support team, and folks get the satisfaction of finding their own solutions.

Use the new Help Center template to create a help center in minutes. When your help center is in place, use a guided setup to step through help center configuration. The guided setup offers links that take you to relevant locations in the help center's user interface.

Tip: If your needs change, you can move from a help center template to another kind of customer portal. A process is available on page 792 in the Administration Workspace for making the switch.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Before you create your help center, there are a few actions you can take to prepare the way.

Enable Salesforce Knowledge in Your Org

Before you can create a help center, Knowledge must be enabled for your org, and you must enable the Knowledge org preference. It's also useful to have a robust collection of Knowledge articles with a focus on solutions to common problems. Ideally, you already have Knowledge enabled along with a large collection of helpful articles. The main purpose of your help center is to give the public easy access to this useful information.

Plan your knowledge base and set up visibility for your data categories

The simpler your data is structured, the easier your help center is to navigate. Make the right content available to the public. You can choose the types of articles to make public so nothing sensitive or proprietary is at risk.

List the topics you intend to cover in your help center

Topics are the foundation of your help center. They make it easy for customers to discover all the information that you provide about a given subject. Talk to your customer support team about the things people ask about most. Base your Featured Topics selection on the most frequently asked questions. If you like, your topics can have a hierarchical structure—for example, you can set up topics with subtopics.

Set up an article layout specifically for your help center

The way an article is laid out can affect how easy it is to access the article's data. Don't hide the lead. Consider offering a summary section at the top so customers can get to basic information quickly.

Note: Way back in Summer '18, we boosted the limits on articles and translation languages for some editions. It's useful to know for your help center planning.

- Essentials: 500 Articles, 1 Language
- Enterprise: 50 K Articles, 5 Languages
- Unlimited 150 K Articles, 10 Languages

Gather your resources

Upload the text and image files you plan to use in your help center to your org.

- For the Featured Topics component, upload 250-by-250-pixel images—one for each featured topic. You can have up to 25 featured topics, but consider using fewer to keep your help center easy to navigate.
- Upload images for your help center's logo, login page background, and page header. Your help center images are a branding opportunity, so make them attractive and representative of your brand. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB.
- Upload an HTML file for your page footer.

  Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

SEE ALSO:

Enable Salesforce Knowledge
Create a Help Center
Organize Communities with Topics
Set Up Featured Topics
Automatically Assign Topics to Articles
Contact Support Form
Access Community Workspaces
Salesforce Knowledge Help and Resources
Plan Your Knowledge Base in Salesforce Classic
Configure the Guest User Profile
Knowledge Article Types

Help Center Setup Tasks

Help Center is designed with self-service in mind. The Help Center template comes with components and pages that you can use as-is or customize to suit your needs.

Get started with your own publicly accessible Help Center! We've put together a set of tasks and useful references for setting up a Help Center.

Plan Your Help Center	• Give Customers Access to Your Knowledge Base Through Help Center
Enable Knowledge in Your Org and Enable the Knowledge Org Preference	• Enable Salesforce Knowledge

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Create and Configure Your Help Center	• Create a Help Center on page 789 • Organize Communities with Topics on page 601 • Set Up Featured Topics on page 608 • Data Categories Best Practices • Automatically Assign Topics to Articles on page 606 • Contact Support Form on page 252 • Check Out Community Workspaces • Community Builder Overview on page 384 • Add more features with Guided Setup • Configure the Guest User Profile for Unauthenticated Users on page 164
Add Branding and Customize Your Help Center Theme	• Customize Your Community (Builder) • Customize Community Pages and Components (Builder) • Customize Community Navigation • Custom Theme Layouts • Brand Your Community on page 54

Create a Help Center

Set up a help center to give guest users access to the knowledge articles that you choose. Help users find solutions, and give them a way to contact you when the answer isn't available. This topic is for you if your org uses Classic Knowledge.

Before you begin, review the topic, "Introducing Help Center," on page 787 and take the advance steps it discusses.

This topic steps you through help center creation when your org uses Classic Knowledge. Generally, you create your help center community using the Help Center template, and then configure it using a guided setup.

1. In your org, go to **Setup** > **All Communities** and click **New Community**.
2. Click the **Help Center** tile, and then click **Get Started**.
3. Enter a name for your help center, and then complete the help center URL.
4. Click **Create**.
5. Go to your help center community's Workspaces, and click the **Guided Setup** tile. Then click the **Help Center** guided setup tile.
6. On the **Help Center** guided setup tile, click the Guided Setup link.
   This step launches the guided setup. The setup steps you through configuring your help center. Each step includes a link to the location in the help center user interface where you can do the configuration described in the step. Guided setup steps include:
   - Creating topics and assigning featured topics
   - Mapping topics to data categories
   - Setting up a Customer Support page

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To create a help center
- Create and Set Up Communities

To work with topics in the Community's content management system (CMS)
- Create Topics
- Merge Topics
- Delete Topics
- Edit Topics

- Setting up your Home page
- Configuring search
- Configuring any other pages you want to include in your help center
- Doing some final configuration in the help center's Workspaces
- Previewing and publishing your help center

7. Create topics and assign featured topics.

   Topics are the fundamental unit of organization in your help center. Ask your customer support team about the situations they get called about most. Use their ideas to create topics that are of great interest to customers seeking solutions. Have 250 x 250 pixel images on hand for each featured topic. These images add to the look and feel of your help center. Create an FAQ topic that you can use as a default topic. Create an FAQ article for your help center with useful, general information.

   a. Go to Community Workspaces, and click the Content Management tile.

   b. Click the **Topics** tab, and then click **Topic Management**.

   c. Add topics to your help center.

      Topics can be hierarchical, so you can add both topics and subtopics.

   d. Still in the Topics area of Content Management, click **Featured Topics** and Set Up Featured Topics on page 608.

8. Map topics to data categories using Automatic Topic Assignment on page 606.

   To make your articles visible in the help center, use data categories to automatically assign multiple topics to articles. This step is crucial. Salesforce Knowledge uses data categories to classify articles and make them discoverable. When you map topics to a data category, any article that uses the category also uses the topics that are mapped to it. Check the box for **Assign this Topic to all existing articles**. This step adds help center topics to existing articles and automates publishing to the help center.

9. In Community Builder, open the Contact Support page, and set up the Contact Support and Case Deflection components.

   Your help center offers a Contact Support page that you set up in Community Builder on page 427. The page comes with Contact Support and Case Deflection components. Case Deflection brings up articles and other resources that are related to the information a guest enters in the contact support form. For the Case Deflection component, set the default topic for "No Content" to your new FAQ topic. When guests come across a topic with no articles, they see your FAQ topic. Assign the FAQ topic to at least one article that contains lots of useful general information.

10. In Community Builder, configure your home page.

    Get your image and HTML files ready to upload. The images are for your help center's logo, login page background, and page header. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The HTML file is for your page footer.

    Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

    a. Go to **Settings** > **General**, and give your guest user profile read access to your Help Center data categories on page 164.

    b. Click the Theme icon, and configure your theme. Add a logo and login background image, select colors and fonts, and tweak Theme Settings.

    c. Configure page components to apply your company's brand to your help center. For example, in the default theme, add images to the Hero Header and Hero Background components.

11. In Community Builder, open the Home page, click the Global Search for Peer-to-Peer Communities component, and configure its properties on page 291.

    Under Autocomplete Search, select **Limit autocomplete search results to Discussions and Articles**.

12. Set up the other pages in your help center to look the way you want.

    Check out these useful help center pages: Topic Detail, Contact Us, and Article Detail. For the Knowledge Article component, clear the **Allow Voting** property. The votes of public users aren't counted.

13. In the Administration Workspace, click **Preferences**, and select **Give access to public API requests on Chatter**.

    This step makes it possible for guest users to access pages that are based on Chatter APIs.

14. Preview, publish, and activate your help center.

    Publishing a community is an essential step, but the task of community creation isn't complete until you also activate it on page 65.

15. Publicize your new help center. For example, share your help center URL with visitors to your company website.

SEE ALSO:

Help Center Setup Tasks
Change from Help Center to a New Template

Help Center Template Pages

The Help Center template offers a public-facing, self-service portal where guest users can search your knowledge base for answers to their questions. It reduces the load on your customer support staff and gives customers the satisfaction of finding their own solutions.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Included Features

- Ready-made template
- Guided setup configuration
- Publicly accessible
- Self-service
- Curated—you decide which of your Knowledge articles is shared

Included Pages

Template Pages

- Home
- Contact Support
- Error
- Search
- Topic Catalog
- Topic Detail

Object Pages

- File Detail
- File List

Content Pages

- News Detail

SEE ALSO:

Manage Your Community's Pages and Their Properties in Community Builder

Page Properties and Types in Community Builder

Change from Help Center to a New Template

Changing from a help center template to another template type is a simple process in itself. But the complexity increases with the things you must consider and actions you must take before you make the change. The complexity of a template change varies according to how much original help center content and configuration you want to preserve in the new template. Keep in mind that Salesforce partners have considerable experience with making template changes and can assist you with this process.

Important: Before you change templates in a production environment, try it out in your sandbox first. If you don't try it out in your sandbox, you run a strong risk of losing data, wasting time, and creating unnecessary cost.

In a template change, some objects and configurations are preserved and some aren't.

Preserved after a Template Change

- Featured and navigational topics
- Topic-to-article mapping
- Data category-to-topic mapping
- Most page content
- Data about trending articles and topics
- Topic statistics
- Your help center URL (but keeping the same URL is optional)

Not Preserved after a Template Change

- Your custom pages–There's a workaround. You can export your custom pages before you change templates. After you change templates, you can import them into the new template.
- Specific component configuration–Some configuration is preserved, like featured topics, navigational topics, and topic-to-article mapping. Some configuration isn't preserved, like search and type-ahead search configuration. A template change offers an opportunity to revisit component configuration. For example, in your help center, you let customers search articles and cases. In your new template environment, you can widen your list of searchable objects to make many more object types easy to discover.
- Branding–Before you change templates, consider whether you want to change or preserve brands in the new template. If you decide to keep the same brand, all the image assets used in the original template are available in your org's asset library. You have access to this library in the Community Builder under **Theme** > **Images**.
- Theme–When you change templates, the theme defaults to the new template's theme. You can reuse theme elements from the original template by grabbing them from your org's asset library.
- CSS styles–You can copy your CSS styles under **Theme** > **Edit CSS**, and paste them into a text file. After you switch templates, you can copy-and-paste your CSS from the text file into the new community.

After you preserve the things you want to retain from your original help center, you're ready to change templates.

1. Ensure that you have the latest version of the help center template.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To change a help center template

- Create and Set Up Communities

a. In Community Builder, open **Settings**, and click **Updates**.
b. Confirm that you understand the update changes, and click **Update**.
c. In the confirmation dialog, click **Update**. In the success dialog, click **Close**.

2. In the Administration Workspace, click **Settings** > **Change Template**.
3. Click the tile for the template you're changing to.
4. Click **Get Started**.
5. In the **Name** field, enter a name for your community.
6. In the **URL** field, enter the value you used for your help center or enter a new value.
7. Click **Create**.

After your new template is in place, bring in the elements from the original help center template that you want to preserve. For example:

- Import the custom pages you exported from your help center.
- Configure page components.
- Apply branding.
- Adjust your theme, including pasting the custom CSS styles you preserved.
- If you had featured topics in the help center, you can drag the Featured Topics component onto your Home page. Your original configuration of the Featured Topics component is preserved in the new template.

SEE ALSO:

Update Your Community's Template
Export a Customized Community Page in a Lightning Bolt Solution
Considerations for Changing Your Community Template
Change Your Community Template

Educate Your Users About Communities

Tell community members what to expect from their community experience.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Switching Between Your Salesforce Org and Your Communities
If you use Lightning communities and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your communities. If you use Tabs + Visualforce communities and Salesforce Classic, use the global header. You can embed a community url directly into buttons or links. You can also redirect a user to another community or to a specific page within another community.

Share Personal Contact Information Within Communities
Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

Search Behavior in Communities
Search capabilities in communities can make or break a member's experience. Search in communities is different depending on whether your community is using a Community Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within a community return results specific to that community.

Manage Your Community Email Notifications

Use email notifications to keep up with important updates in communities.

Chatter in Communities

Chatter is a social network for holding and preserving discussions in a business, customer community, or other enterprise. But it's not all talk. Community members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your community, fostering insight and inspiration. Chatter lets you stay focused on your business and the things you want to get done.

Community Cloud Cookies

Salesforce communities use cookies to improve functionality and speed up processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the community.

Switching Between Your Salesforce Org and Your Communities

If you use Lightning communities and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your communities. If you use Tabs + Visualforce communities and Salesforce Classic, use the global header. You can embed a community url directly into buttons or links. You can also redirect a user to another community or to a specific page within another community.

Switching between your Salesforce org and your communities doesn't disrupt your workflow. We return you to the page where you were last working, either in the current browser tab (standard apps) or in a new browser tab (connected apps and communities). If you are using the app launcher or the global header, whichever communities you are a member of is displayed as a dropdown or tile.

EDITIONS

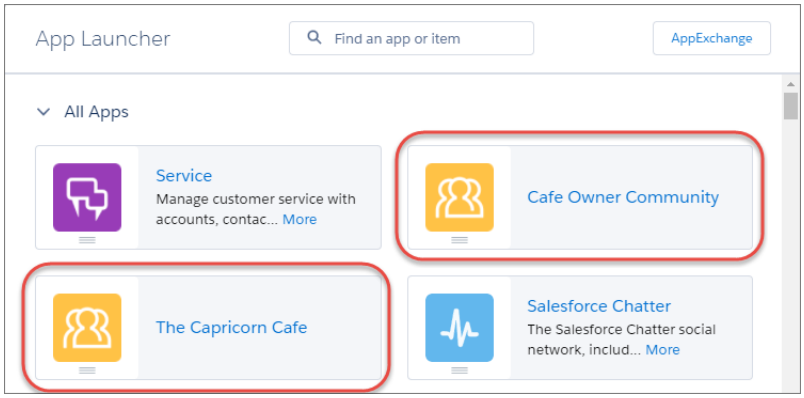
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

App Launcher for Lightning Communities and Lightning Experience

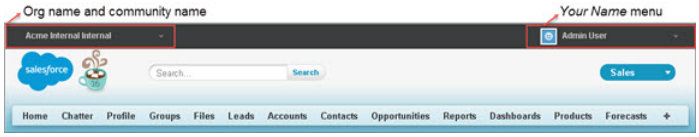
The App Launcher is available in communities based on Customer Service, Partner Central, and Lightning Bolt Solutions. By default, the App Launcher is hidden in existing communities and displayed in new communities.

In Lightning Experience, the App Launcher displays a tile for every published community along with your apps. In Lightning communities, the App Launcher displays a tile for every published community and app but the All Items area and AppExchange link aren't available. Members see only the communities and apps that they're authorized to see according to their profile or permission sets.



Note: The App Launcher is not available in the Salesforce app or in Salesforce Tabs + Visualforce communities. Members of these communities can use the global header to switch between their Salesforce org and their communities.

Global Header for Tabs + Visualforce Communities and Salesforce Classic



The menu on the left side lets you switch between communities and your Salesforce org.

- The dropdown shows all the active communities that you're a member of.
- If you have the "Create and Set Up Communities" permission, you also see communities in preview that you're a member of.
- Internal users who aren't members of any community only see the company name.
- External users see the dropdown menu only if they belong to more than one active community.
- If an external user who is only a member of one active community is given the URL for a community in preview, they don't see the dropdown menu in the community.

Important: If your org is setting up a My Domain that hasn't finished deployment of the new custom domain, switching from a community to your internal org directs you to the Salesforce login page instead. This can happen when you've logged in using a My Domain URL that has been registered but not yet deployed. Once your domain is deployed, selecting your organization in the dropdown directs you to the internal organization as expected.

The *Your Name* menu on the right side contains links to edit contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features.

Embedded Community URLs

If you want to allow users to switch between their communities and their Salesforce org, you can also embed community urls into buttons or links.

- Enable the global header to make community urls visible.
- Copy the url of the community you want to link to.
- Embed the url wherever you want it to appear on your site.

- Disable the global header if you want. Users are still able to seamlessly switch from one community to the next without additional logins.

You can also direct users to a specific page in a community, such as a checkout cart—rather than a homepage. To redirect your customers to a specific page, add the following parameter to your company url:

/servlet/networks/switch?networkId=*<your 18 digit salesforce community ID, which can be found at the end of the community url>*&startURL=*<url of specific page you want to direct customers to>*

SEE ALSO:

Enable the App Launcher in Lightning Communities

Enable the Global Header for Communities

Set Up and Manage Salesforce Communities

Share Personal Contact Information Within Communities

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

When interacting with other community members, it's important to balance being visible and accessible with protecting your personal contact information. You may not want to show your job title, phone numbers, and other contact details outside of your internal organization. Your customers and partners may not want other customers and partners viewing all their contact information.

Use either the user interface or API to control visibility. You can choose to expose fields to employees only, members of the community from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the community Some fields allow up to three levels of visibility, while others allow fewer.

- Employees—Only members from the internal organization can view.
- External—Members from the internal organization and external members, such as customers and partners, can view. External users are users with Community, Customer Portal, or partner portal licenses.
- Public—Anyone can view, including guest users viewing publicly accessible pages that don't require login. Guest users can access public pages in communities via the Guest User license associated with each site or community.

In the API, setting a field to `true` on the User object makes it visible to the type of user indicated in the field name (external or guest users).

Consider these tips about the visibility of your contact information.

- Your chosen settings apply to every community you're a member of.
- When a user is restricted from viewing a contact information field, there are differences in what's displayed in the user interface versus the API.
  - In the user interface, the restricted field is hidden from your profile everywhere that it usually displays in a community. If your organization displays your profile information on custom Visualforce pages, the field still displays, but with the value `#N/A`.
  - In the API, a field set to `false` returns the value `#N/A`.
- Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

Default Visibility Settings for Contact Information

This table summarizes the default visibility settings for contact information and your options for restricting visibility.

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to *Your Name* > **Edit Contact Info**, then click **About**	Everyone see these fields unless your administrator enables nickname display or creates a custom page that displays this information. If your administrator has enabled nickname display, your nickname displays in place of your first and last names in most locations.	N/A

Title	External	Go to *Your Name* > **Edit Contact Info**, then click **About**	Employees, external, or public	`UserPreferencesShowTitleToExternalUsers`
				`UserPreferencesShowTitleToGuestUsers`
				Note: When the guest user preference is set to `true`, the job title field is visible to external members even if the external member preference is set to `false`.

Profile photo	External. Users without access see the stock photo.	On your profile page, click **Update** under your photo (or **Add Photo** if you haven't added a photo yet), then select `Show in communities with publicly accessible pages`	External or public	`UserPreferencesShowProfilePicToGuestUsers`

City
Country
Email
Fax
Mobile Phone
State
Street Address
Work Phone
	Employees	Go to *Your Name* > **Edit Contact Info**, then click **Contact**	Employees, external, or public	Note: For each pair of preferences controlling the visibility of a field, when the guest user preference is set to `true`, the field is visible to external members even if the external member preference is set to `false`.
				`UserPreferencesShowCityToExternalUsers`
				`UserPreferencesShowCityToGuestUsers`
				`UserPreferencesShowCountryToExternalUsers`

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object

Zip/Postal Code				`UserPreferencesShowCountryToGuestUsers`
				`UserPreferencesShowEmailToExternalUsers`
				`UserPreferencesShowEmailToGuestUsers`
				`UserPreferencesShowFaxToExternalUsers`
				`UserPreferencesShowFaxToGuestUsers`
				`UserPreferencesShowManagerToExternalUsers`
				`UserPreferencesShowManagerToGuestUsers`
				`UserPreferencesShowMobilePhoneToExternalUsers`
				`UserPreferencesShowMobilePhoneToGuestUsers`
				`UserPreferencesShowPostalCodeToExternalUsers`
				`UserPreferencesShowPostalCodeToGuestUsers`
				`UserPreferencesShowStateToExternalUsers`
				`UserPreferencesShowStateToGuestUsers`
				`UserPreferencesShowStreetAddressToExternalUsers`
				`UserPreferencesShowStreetAddressToGuestUsers`
				`UserPreferencesShowWorkPhoneToExternalUsers`
				`UserPreferencesShowWorkPhoneToGuestUsers`

Search Behavior in Communities

Search capabilities in communities can make or break a member's experience. Search in communities is different depending on whether your community is using a Community Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within a community return results specific to that community.

Note: To be searchable in communities, objects must be searchable in Lightning Experience and supported in community templates.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For all communities:

Search behavior in communities is different from searches in the internal org:

- In general, searches within a community return matches from within the community. To find items from a different community, members must leave the current community and search from within the other community.
- In community search results, members can see what they have access to through their profiles and permission sets. In addition, they can also view data that is explicitly shared with them in the community context. This can include internal company content and records not explicitly shared with the rest of the community. For example, if the user's profile allows access to accounts, but the accounts tab isn't exposed in the community, the member can still view account data in their search results.
- For user searches performed by external users of a community, global search and enhanced lookup search (with the **All Fields** option selected) query the following limited set of fields:

  - Name
  - Username
  - User ID
  - Body
  - Email
  - Phone
  - Custom fields

  For example, say an external community member searches for a user, John Doe, by his alias `jdoe`. If that term isn't contained in any of the searchable fields in the user object, John Doe's record isn't included in search results.
- Search results include all the records and files that a community member has access to. This includes records not explicitly exposed in the community or records and files they have access to in the internal Salesforce organization. In file searches, users can see:
  - Files they own
  - Files shared with them directly
  - Files they have access to in a library
  - Files that are posted to a record they have access to
  - Files that are posted to groups or shared with that community
- The admin must enable search result filters for an object in the internal org for it to be searchable in a community. To make custom objects searchable, the object must be associated to a tab in the internal org.

For communities using the Koa and Kokua templates:

- The Featured Search component lets community members search for articles within a specific data category.
- The Article List component shows the search results based on the search term entered in Featured Search.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. The latest Lightning community templates provide richer support for Knowledge and case management.

For communities using the Customer Service template:

- The Search Publisher component lets community members enter search terms in the community.
- The Search Results component shows a list of search results limited to articles and discussions.

  Note: Only articles that have a topic associated to them in Topic Management populate in the Search Results component.

- The Global Search Results component lets members see search results in one tab (All), or in separate tabs for cases, accounts, contacts, feeds (discussions), and any other object exposed in the community (including custom objects) to which they have access.

  Note: Admins must associate a tab to a custom object to make it searchable in global search.

- The Search & Post Publisher component gives admins the option to set up autocomplete search results. These suggested search results populate based on objects made searchable in the community, and included in autocomplete search.

For all Lightning communities

Users in a community can filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks. Search filtering for communities is on by default in your Salesforce org. From Setup, in the Object Manager, go to Search Layouts for each object you want to filter. Add the fields that users want to filter to the Search Results layout. Supported field types are checkbox, phone number, picklist, text, and URL. You can't filter encrypted fields.

Note: Filtering on knowledge articles is a beta feature. As a beta feature, filtering on knowledge articles is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

For communities using Salesforce Tabs + Visualforce:

- If Chatter is enabled in your org, global search and contextual feed search are enabled by default in all communities.
  - With global search, members can search for records, files, people, groups, topics, and feed posts and comments.
  - Feed search ( ) is helpful when members want to look for information in a specific feed context. Groups, user profiles, records, and the community feed support feed search.
- If Chatter isn't enabled, sidebar search is enabled in all communities.
  - Sidebar search doesn't support searches for items specific to Chatter, such as feeds, groups, files, topics, and user profiles.

SEE ALSO:

Configure Search Results in Lightning Experience

Manage Your Community Email Notifications

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use email notifications to keep up with important updates in communities.

You can choose to receive email notifications whenever someone posts on your profile, comments after you on a post you've commented on, posts to a group you belong to, and more. Email notification preferences are set by community.

To set your email preferences, go to your profile page within a community, click the dropdown button ( ) in the upper-right corner and select **My Settings**, then click **Email Settings**. You can turn individual notifications on or off.

Your chosen settings apply to the current community. If you don't belong to any groups yet, you won't see the option to set groups on this page until after you join your first group. You can also set your group email preferences using the **Email Me...** dropdown on each group's page. You can choose to receive a daily or weekly digest email or an email every time someone posts. This option is visible if you're a group member.

Your email options are similar to the Chatter email settings in your internal organization under your personal settings (*Your Name* > **My Settings** > **Email Settings** for Chatter Free users). Within communities, however, note the following differences.

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching *Email Settings* in the **Quick Find** search box in Salesforce Setup.

- The default notification frequency for new groups you join can't be set via the user interface. It can be set only via Salesforce APIs (SOAP API and REST API).
- Personal digests aren't currently available.
- You don't receive notifications when new articles are added to topics.
- If your community has Chatter messages enabled, you're notified of file shares in a message. If Chatter messages aren't enabled, you are notified of file shares by email.
- If flagging is enabled in the community, the `Flags an item as inappropriate` option appears for all members of the community, but only sends notifications if:
  - You're a group owner or manager and a member flags a post, comment, or file in your group.
  - You're a moderator and a member flags a post, comment, or file you have access to. Depending on the type of notification you want to receive, you also need following permissions:

Email Notifications About	Required Permission
Flagged posts and comments	"Moderate Communities Feeds"
Flagged files	"Moderate Communities Files"
Flagged Chatter messages	"Moderate Communities Feeds" and "Moderate Communities Chatter Messages"
Flagged direct messages	"Moderate Communities Chatter Messages"

If the **Flag as Inappropriate** link doesn't work in your email, try flagging the message from the UI.

SEE ALSO:

Navigate to Chatter Email Settings

Chatter in Communities

Chatter is a social network for holding and preserving discussions in a business, customer community, or other enterprise. But it's not all talk. Community members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your community, fostering insight and inspiration. Chatter lets you stay focused on your business and the things you want to get done.

In communities, where Chatter is often referred to as *feeds*, lots of extra features that support customer and partner communities are available. For example, use threaded discussions to add dimension to your feeds by including the power to reply to answers and comments. Enable company verification to put your organization's stamp of approval on an answer to a customer question. Use streams to join multiple feeds together into one mega-feed. Use direct messages to create a break-out session with a customer or partner needing individual attention.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Who Can See What in Communities

Threaded Discussions in a Community

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can experience this lively flow in your communities.

Close a Conversation

The question is answered, the topic discussed, the poll decided—what do you do now? You end the conversation. Community admins, moderators, and permitted members can close a question, poll, or post. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Chatter Streams in Communities

Your community members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

View Community Streams from Your Internal Salesforce Org

Community members who have access to their internal Salesforce org can view their community streams from the org. When you click most community-based links from the internal org view, they lead right back to the community.

Share a Link to the Detail View of a Post

The Share feature on a feed post includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like.

SEE ALSO:

- Enable and Assign Permissions to Use Code Snippets
- Rename the Chatter Tab
- Assign Post Pinning Permission
- Assign Permission to Verify Answers for Your Company
- Enable Upvoting and Downvoting
- Add Rich Publisher Apps to Your Feeds

Who Can See What in Communities

Communities contain various types of users who require varying levels of access. What users see depends on their user type and which tabs the administrator selects when creating the community. The behavior we cover in these tables doesn't take into account updates to your sharing model or user sharing.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Administer communities in Salesforce	Can create communities, customize tabs and branding, add or remove members, and activate or deactivate a community. User must also have the "Customize Application" permission to create or customize communities.	Not available	Not available
Global Header	The dropdown in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can access setup for all communities, regardless of status. Can see communities in `Preview` status.	The dropdown in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can't access communities in `Inactive` status. Can see communities in `Preview` status if a link is provided.	The dropdown in the global header shows a list of communities the user has access to. Can't access communities in `Inactive` status. Can see communities in `Preview` status if a link is provided.
`Your Name` menu in Global Header	Same as in internal organization.	Same as in internal organization. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal organization and all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
Access to Community Workspaces or Community	Admins or users with "Manage Communities" can see the menu	Users with "Manage Communities" can see the menu	Not available

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Management menu in Global Header	and use it to preview the community or access community settings in Community Builder, Site.com Studio, and Lightning Platform. Note that the Community Builder option doesn't appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	and use it to preview the community or access Community Builder, Site.com Studio, and Lightning Platform. Note that the Community Builder option doesn't appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	
Salesforce Help	Can see Salesforce Help.	Standard Salesforce user sees Salesforce Help. Chatter Free user sees Chatter help.	Not available
People	Can see everyone else in the community and vice versa.		
Profiles and people hovers	Can see all contact information fields (such as Title, Work Phone, and Email) on all community members' profiles. In people hovers, user always sees members' Title, Work Phone, and Mobile Phone fields.		Can see all members' First Name, Last Name, and Nickname fields and profile photos, but can only see additional contact information fields that members have chosen to show to external users. By default, Title is shown while all other fields are not. In people hovers, user sees Title, Work Phone, and Mobile Phone fields only if the member has chosen to show them.
Records (such as accounts, leads, opportunities)	Can see records they own, and records they have access to (based on sharing rules) across all communities and their internal org.	Standard Salesforce user sees records they own, and records they have access to (based on sharing rules) across all communities and their internal organization. Chatter Free user doesn't have access to records.	Can see records they own, and records they have access to (based on sharing rules and permissions) across all communities.
Dashboards and Reports	Can view and create dashboards and reports		Role-based external users can create and edit reports in communities, but not in portals.

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
			However, there are some exceptions. For more information, see Set Up Report Management for External Users—Create and Edit Reports. All role-based external users can refresh dashboards.
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.
Community User Visibility	Can set visibility on a community-by-community basis, by checking **See other members of this community**. Once checked, members of that community can see each other and members of other communities that they belong to that also have enabled community user visibility.	If enabled, members can see other members within their community as well as members of other communities that they belong to that have selected **See other members of this community**.	If enabled, members can see other members within their community as well as members of other communities that they belong to that have selected **See other members of this community**.

Chatter Visibility

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Groups	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create groups. In groups user is a member of, can post,	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create groups. In groups user is a member of, can post,	Within a community, user can see all groups in the community and join them, but can't see groups from other communities they're a member of. Can create groups. In groups user is a member of, can post,

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	comment, post files or links, or share someone else's post. Administrators can also control whether users in the organization and external users can create groups through the "Create and Own New Chatter Groups" user permission.	comment, post files or links, or share someone else's post.	comment, post files or links, or share someone else's post.
Files	Regardless of the current community, users see files they own, that are shared with them directly, that they have access to in a library, or that are posted to a record they have access to. Files posted to groups and shared with an entire community can be viewed only in that community. There's a difference between when files are visible and when they're shareable through the Chatter publisher. Files in libraries are visible, regardless of the community where the files were uploaded. You can share files across communities through the Chatter publisher as long as those files are in libraries that you have access to. However, you can share files that are not in libraries only within the community where they were uploaded.		Regardless of the current community, users see files they own, that are shared with them directly, or that they have access to in a library. Portal users see files posted to records they have access to, unless the record post was marked "Internal Only". There's a difference between when files are visible and when they're shareable through the Chatter publisher. Files in libraries are visible, regardless of the community where the files were uploaded. You can share files across communities through the Chatter publisher as long as those files are in libraries that you have access to. However, you can share files that are not in libraries only within the community where they were uploaded.
Profiles	Can see profiles for all members in the current community.		Can see profiles for all members in the current community. Cannot see profiles of users in the internal organization. Profile visibility enforces user sharing.
Recommendations	User gets people, group, file, and record recommendations for the current community only.		

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Activity and Influence	Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is counted in the user's internal organization and not in the community where the activity occurred.		Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is not counted in the user's activity statistics and influence.
Email Notifications	Email notification preferences are set by community. Within a community, users can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from their personal settings. (Enter *Chatter* in the Quick Find box, then select **Email Notifications**.) Within a community, all users can control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.	Email notification preferences are set by community. Within a community, standard Salesforce user can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from their personal settings. (Enter *Chatter* in the Quick Find box, then select **Email Notifications**.) Chatter Free user can control Chatter emails for their communities under *Your Name* > **My Settings** > **Email Settings**. The chosen settings apply to the current community. Within a community, all users can control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are	Email notification preferences are set by community. Within a community, external users can control their Chatter email notifications under *Your Name* > **My Settings** > **Email Settings**. Portal users can also control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
		automatically switched to daily digests.	
Topics	Can see hashtag topics and Chatter topics, including topics in feeds, the topics list, topic detail pages, Trending Topics, and Recently Talked About topics for the current community only.		
Favorites	Can add search, topic, and list view favorites in the current community.		Can add only topic favorites in the current community.
Chatter Messages	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Administrators with "Manage Chatter Messages" and "API Enabled" permissions can delete messages. The API allows users to send Chatter messages across communities.	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of.	In the user's list of Chatter messages, can see all messages they have sent or received in any community they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Chatter messages are accessed through the Chatter tab, which may be disabled for external community members. Administrators should ensure that the Chatter tab is enabled if using Chatter messages in communities.
Messenger (Chat)	Messenger is not available with Communities.		

Feeds Visibility

The following table shows what each kind of user can do or see in Chatter Feeds within a community.

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Post on a record	Can post on any records within the community.	Can post on any records within the community to which the user has access.	Can post on any records within the community to which the user has access.
Bookmark a post	Can bookmark posts within the current community. The Bookmarked feed only contains posts from the current community.		
Mention someone	Can mention people specific to the current community. User can't mention an external user on an internal post.		Can mention people specific to the current community.
Share a post (repost)	Can share a post only in the current community.		
Add topics to a post	Can add hashtag topics and Chatter topics to any posts within the current community. Topics are specific to the current community and can't be accessed from another community.		

Search Visibility

Search behavior in communities varies slightly from the search in the internal organization. Search results respect sharing rules for all items by default. The following table describes what each type of user in a community can see in search results.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
People	People specific to the current community.		
Users	• Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization. • Portal users can't search for users in the community when sidebar search is enabled. • When external community members search for users, global search and enhanced user lookups (with the **All Fields** option selected) query the following limited set of fields on user records: – Name – Username – User ID – Body – Email – Phone		

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	– Custom fields		
Groups	Groups specific to the current community.		
Files	Visibility in the current community: • Owned files • Files shared with the user in a public or private group • Files shared with the entire community Visibility in any community: • Files posted on accessible records and record feeds • Salesforce CRM Content library files that the user has access to Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.		Visibility in the current community: • Owned files • Files shared with the user in a public or private group • Files shared with the entire community Visibility in any community: • Files posted on accessible records and record feeds (unless the file posted on the record is marked "Internal Only") • Salesforce CRM Content library files that the user has access to Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.
Topics	Topics specific to the current community.		
Feeds	Feed posts and comments from within the community where the search is performed. Global search returns information from all feed contexts. Contextual feed search ( ) returns information from within the context where the search is performed, such as from the feed on a user's profile, a record, or a group. To find information in a different community feed, users must search from within that community.		
Search Auto-Complete	Recently accessed items specific to the current community.		
Records (accounts, contacts, leads, and so on)	Full visibility for all items across all communities and in the internal organization.	Visibility for all items the user has access to through	Visibility for all items the user has access to through their

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
		their user profile or permission sets across all communities and in the internal organization.	user profile or permission sets across all communities.
User lookups on records	All users across all communities and in the internal organization.		Users who are members of all communities that the user is also a member of, and other external users associated with the same external account. Users with partner portal licenses also see the owner of the portal account. The Recently Viewed Users list in the lookup shows all users that they have access to via their license, profile settings, permission sets, and sharing rules. If user sharing is enabled in your organization, this behavior varies depending on how it's configured. For external community members, enhanced user lookups search within a limited set of fields when the **All Fields** option is selected.
Lookup searches on records	Full visibility for all items across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.
Lookup searches in Community Management	Lookups in Community Management and Community Workspaces initially return the items you most recently viewed from within the community. If an object you're looking for isn't in	No	No

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	the Recently Viewed Documents list, try typing all or part of the object name and searching again.		
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Differences Between the Full Salesforce Site and the Salesforce App

There are minor differences in the Communities experience between the full site and the Salesforce app. From an object page:

- The Salesforce app displays a recently viewed list only for the selected object.
- The full site displays a recently viewed list that can be changed to display any recently viewed objects.

Note: Community users on the Salesforce app are shown the default list view specified for the object. Salesforce app users may not see a recently viewed list depending on the default list view chosen. The recently viewed list doesn't appear for custom objects.

SEE ALSO:

Set Up and Manage Salesforce Communities

Threaded Discussions in a Community

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can experience this lively flow in your communities.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

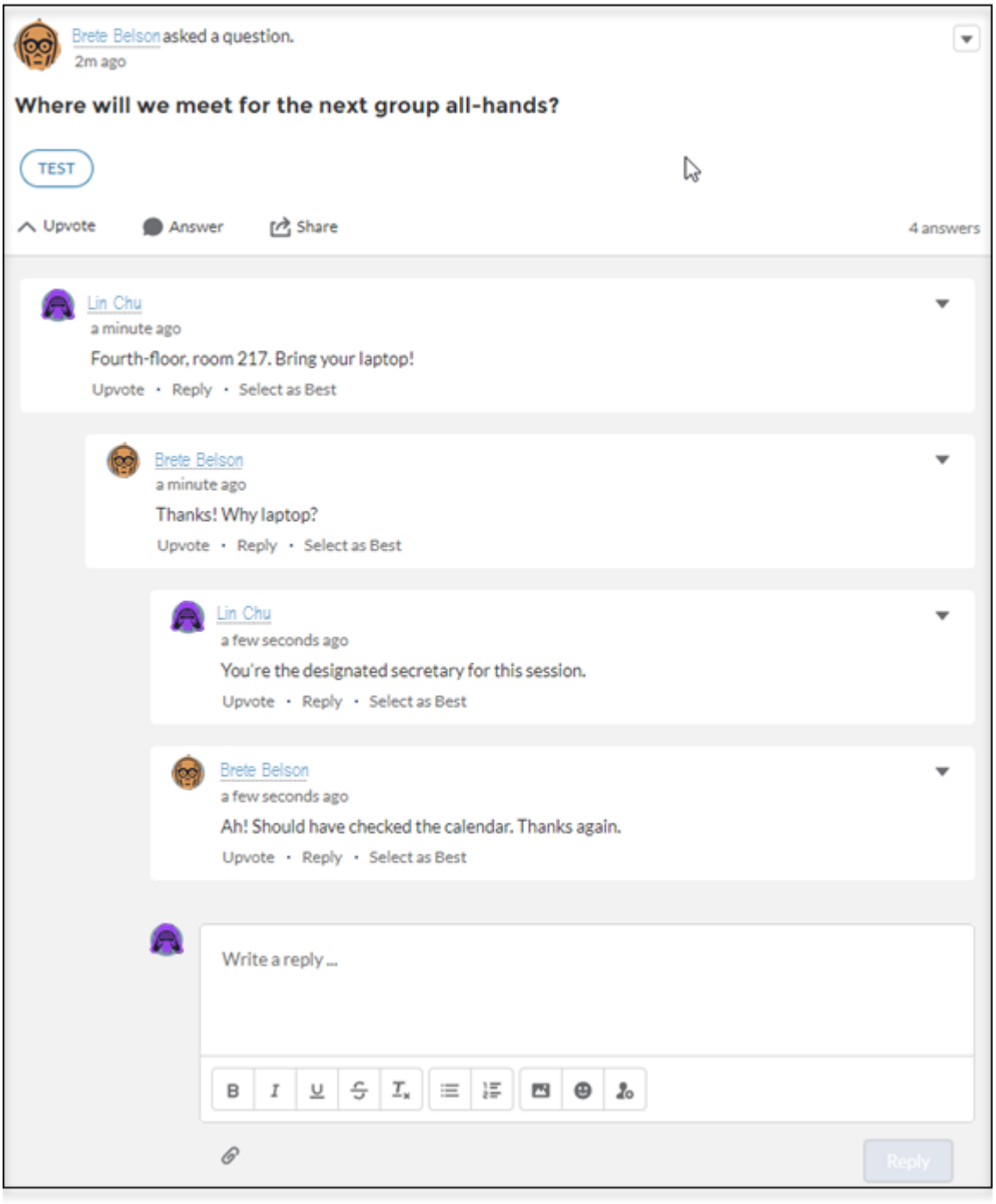
USER PERMISSIONS

To enable threaded discussions in a community:

- Enable Chatter

  AND

  Create and Set Up Communities



A thread is any feed item that has one or more levels nested under it. For example, a question with an answer or a comment with a reply is a thread. When you enable threaded discussions in your community, all discussions convert to threaded discussions: Members can comment on a post, answer a question, and reply to those comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

The notification emails you receive for threaded discussions link more deeply into the discussion. All notification links used to go to the top of the thread; now they land you on new thread content.

To prevent the loss of important content, in orgs created after Winter '19 most community members are blocked from deleting discussion threads.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

If nothing is nested under a feed item, the author can always delete the item.

IN THIS SECTION:

Enable Threaded Discussions in a Community

Enable a preference in the Administration Workspace to change all community discussions to threaded discussions. Threaded discussions add the Reply feature to feeds. In addition to commenting on a post or poll or answering a question, you can reply to an answer or a comment. Threaded discussions are indented up to three levels to clarify who is replying to what.

Delete a Discussion Thread in a Community

Deleting a discussion thread is the same as deleting any feed item with something nested under it. The thing to consider is whether deletion is blocked in your community. To prevent loss of important content, orgs created after Winter '19 block most community members from deleting feed items that have something nested under it. For example, when a question has an answer, deletion of the question is blocked.

Enable Threaded Discussions in a Community

Enable a preference in the Administration Workspace to change all community discussions to threaded discussions. Threaded discussions add the Reply feature to feeds. In addition to commenting on a post or poll or answering a question, you can reply to an answer or a comment. Threaded discussions are indented up to three levels to clarify who is replying to what.

Important: To prevent loss of important content, orgs created after Winter '19 block the deletion of feed items that have something nested under them. For example, when a question has an answer, deletion of the question is blocked.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

If nothing is nested under a feed item, the author can always delete the item.

Enable threaded discussions in your community in the Administration Workspace.

1. Open Community Workspaces, and click the Administration Workspace.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable threaded discussions in a community:

- Enable Chatter

  AND

  Create and Set Up Communities

2. Go to the Preferences page, and select **Allow discussion threads**.
3. Click **Save**.
   All discussions in your community convert to threaded discussions: In addition to comments and answers, members can reply to comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

Delete a Discussion Thread in a Community

Deleting a discussion thread is the same as deleting any feed item with something nested under it. The thing to consider is whether deletion is blocked in your community. To prevent loss of important content, orgs created after Winter '19 block most community members from deleting feed items that have something nested under it. For example, when a question has an answer, deletion of the question is blocked.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads. If nothing is nested under a feed item, the author can always delete the item.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

1. Open the actions menu on a feed item.
2. Select **Delete**, and then confirm the deletion.
   When delete is **not** blocked, the feed item and everything nested under it are deleted. When delete **is** blocked, the item is deleted only under these conditions: The item has nothing nested under it and you are its author, or you have the right role or permission.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete a discussion thread in a community:

- Modify All Data

  OR

  Moderate Communities Feeds

  OR

  Salesforce disabled block-delete at your org's request

  AND

  You are the author of the post, question, comment, or reply

Close a Conversation

The question is answered, the topic discussed, the poll decided—what do you do now? You end the conversation. Community admins, moderators, and permitted members can close a question, poll, or post. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Closing conversations is available in group, topic, discussion, and user profile feeds in your communities. Community admins and moderators can close posts, polls, and questions without any special configuration. Admins can assign the Close Conversation Threads permission to community members.

Note: When a conversation is exposed in your internal org, for example, through a cross-community stream, the conversation's open or close status is respected.

After a thread is closed, some actions are available to all and some actions are available only to admins and authorized members. This table outlines who can do what after a feed item is closed.

Action	Availability on a Closed Conversation
Add a comment	Blocked
Answer a question	Blocked
Vote on a poll	Blocked
Edit a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Edit a topic	Available
Delete a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Publish a pending review comment (community moderation)	Available to admins and moderators
Like or unlike; upvote or downvote	Available
Select or remove a best answer	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Company verify; remove verification	Available only to people with the Verify Answers to Chatter Questions permission
Flag	Available
Share	Available
Bookmark	Available
Mute and unmute	Available
Escalate to case	Available only to people permitted to escalate a feed item to a case

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a community:

- Enable Chatter

  AND

  Create and Set Up Communities

IN THIS SECTION:

Assign Close Conversation Permission Through a Permission Set
To permit community members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Assign Close Conversation Permission Through a User Profile
To permit community members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Close a Post, Poll, or Question
Community admins, moderators, and permitted members can close a question, poll, or post to most new activity. And, if needed, they can reopen it.

Assign Close Conversation Permission Through a Permission Set

To permit community members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Assign the Close Conversation Threads permission in Setup through permission sets.

1. In Setup, enter *Permission Sets* in the Quick Find box, then click **Permission Sets** in your results.
2. Open the permission set you plan to use.
3. Open System Permissions.
4. Select **Close Conversation Threads**.
5. Assign the permission set to the community members who will close community posts, questions, and polls.

SEE ALSO:

Assign Permission Sets to a Single User
Create Permission Sets

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a community:

- Enable Chatter

  AND

  Create and Set Up Communities

Assign Close Conversation Permission Through a User Profile

To permit community members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Assign the Close Conversation Threads permission in Setup through user profiles.

1. In Setup, enter *Profiles* in the Quick Find box, then click **Profiles** in your results.
2. Click **Edit** next to the user profile you plan to change.
3. Note: You can't edit standard user profiles. You can edit custom profiles, and you can clone a standard profile and edit the clone.

   Under Administrative Permissions, select **Close Conversation Threads**.
4. If the profile isn't already assigned, assign it to the community members who will close community posts, questions, and polls.

SEE ALSO:

Edit Users

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a community:

- Enable Chatter

  AND

  Create and Set Up Communities

Close a Post, Poll, or Question

Community admins, moderators, and permitted members can close a question, poll, or post to most new activity. And, if needed, they can reopen it.

With the right permissions, you can close conversations in group, topic, discussion, and user profile feeds. The close action is available on the post, question, or poll's overflow menu in both the full feed and the feed item's detail view.

EDITIONS

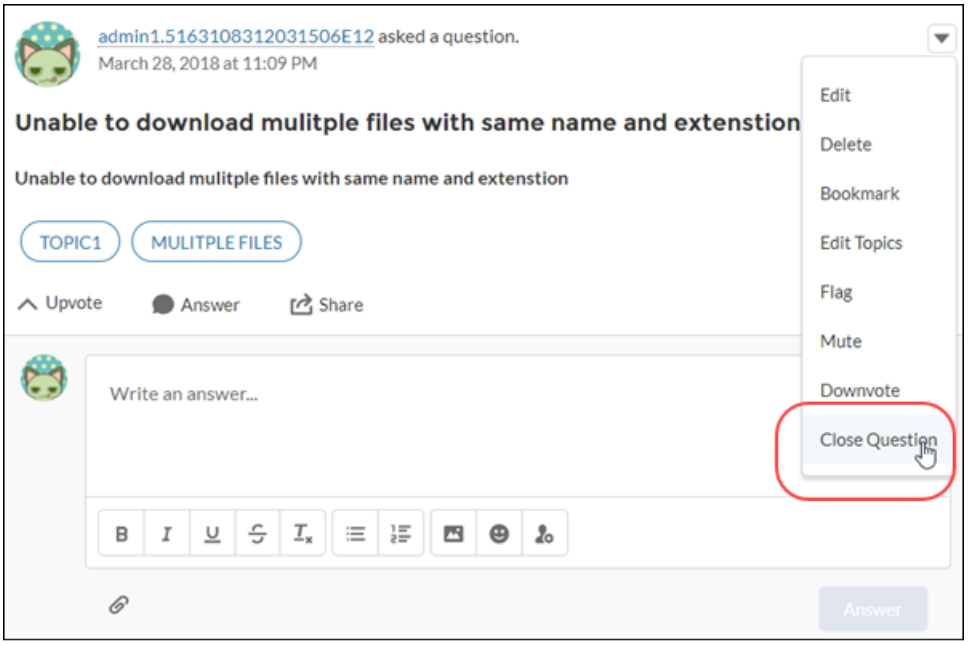
Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To close a conversation, in a community:

- Close Conversation Threads



1. Go to the feed item, for example, a question, poll, or post, and open its overflow menu.
2. To close a question, select **Close Question**; to close a post, **Close Post**; to close a poll **Close Poll**.
   The feed item is closed to most new actions.

   Note: When a feed item is closed, the overflow menu shows open options, for example, **Open Question**, **Open Post**, and **Open Poll**.

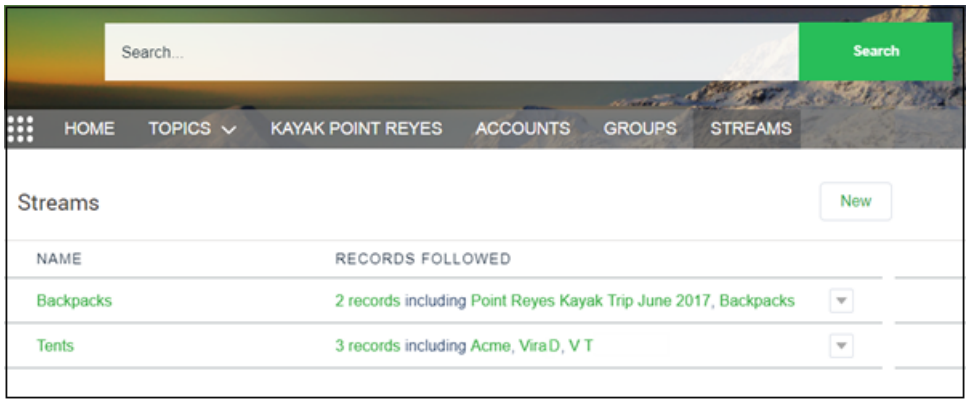
Chatter Streams in Communities

Your community members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Each community member has their own view of the Streams page where they see their own streams. On the Streams page, members can create streams and use row actions menus to edit and delete their streams.

If you find yourself moving between your communities and your internal Salesforce org, you can see your community streams in your org. For more information, see View Community Streams from Your Internal Salesforce Org on page 826.

IN THIS SECTION:

Add a Chatter Stream in a Community
Add a stream through the community's Streams home page. The Streams home page has controls for creating and managing streams.

Delete a Chatter Stream in a Community
When a stream has lived out its useful life, you can easily delete it from your list of streams. Deleting a stream doesn't delete the records or posts it contains. It only deletes the stream, which frees up space for you to create more streams.

Edit a Chatter Stream in a Community
Edit a Chatter stream to add feeds to it or remove feeds from it. You can also change the stream's name.

Add a Chatter Stream in a Community

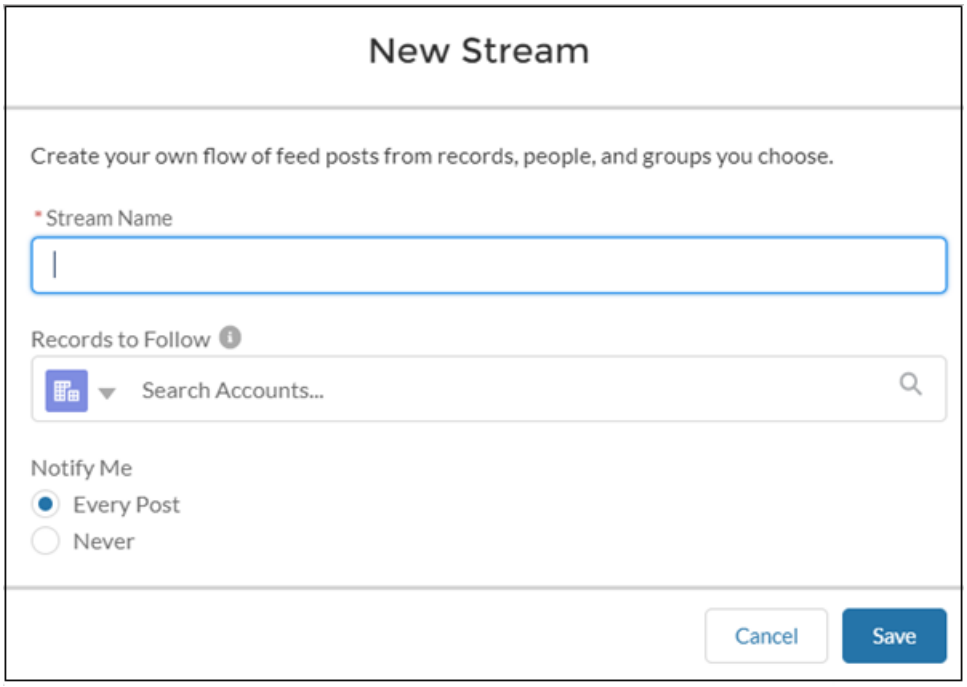
Add a stream through the community's Streams home page. The Streams home page has controls for creating and managing streams.

1. Open the Streams page, and click **New**.
2. In the New Stream dialog, enter a name for your stream.

EDITIONS

Available in: Lightning communities

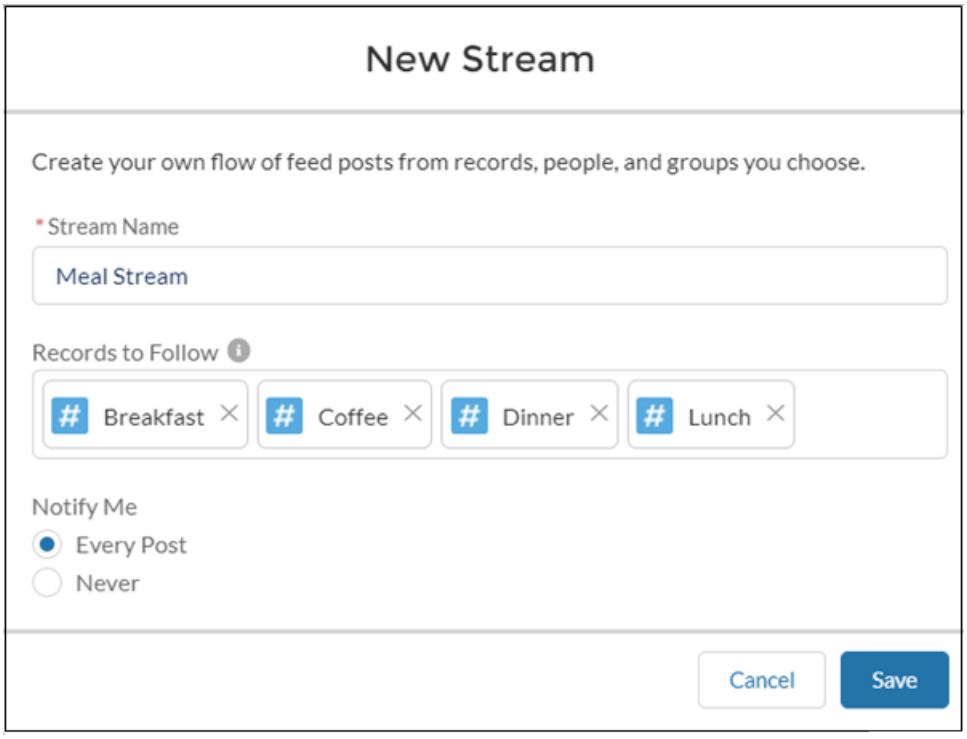
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



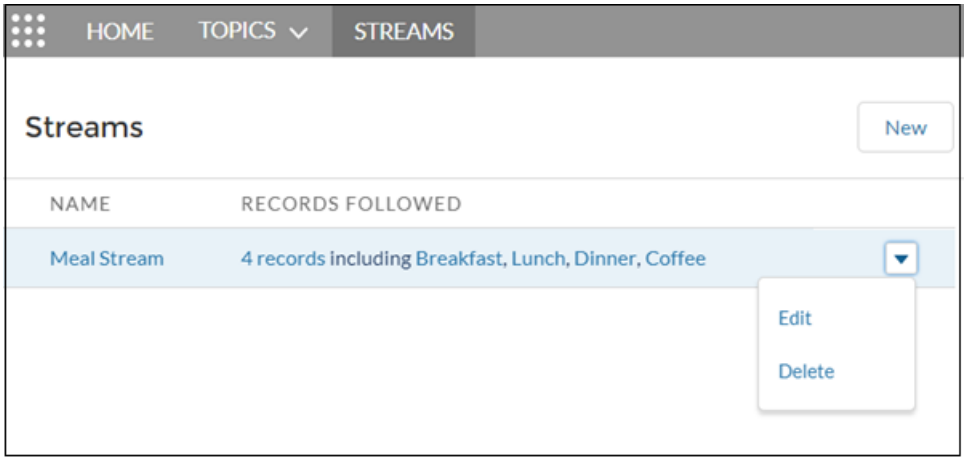
3. Under **Records to Follow**, select a type of feed you want to add to this stream.
4. In the same field, enter the name of a feed you want to add.

   Note: When you add a Knowledge article to a stream, find the article by its ID number rather than its title.

5. In your search results, click the feed you want to add.
   Selected feeds appear below the **Records to Follow** field.



6. Under **Notify Me**, select a notification option. To receive an email notification whenever a new post appears in the stream, select **Every Post**. To turn off notifications for this stream, select **Never**. Choose wisely, these notification options don't appear in the Edit Streams dialog.
7. Click **Save**.
   Your new feed appears in a row on the Streams page. The row lists the number of feeds (records) added to the stream and the added feeds. Stream actions appear on the row actions menu at the end of the row. To open a stream, click its name.



Delete a Chatter Stream in a Community

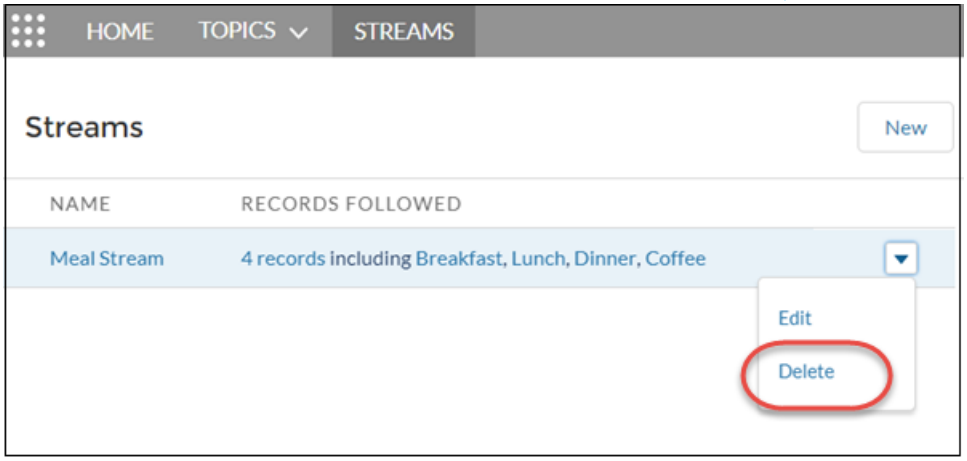
When a stream has lived out its useful life, you can easily delete it from your list of streams. Deleting a stream doesn't delete the records or posts it contains. It only deletes the stream, which frees up space for you to create more streams.

1. Open the Streams page, and, from the row actions menu on the stream you want to remove, select **Delete**.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



2. In the confirmation dialog, click **Delete**.

Edit a Chatter Stream in a Community

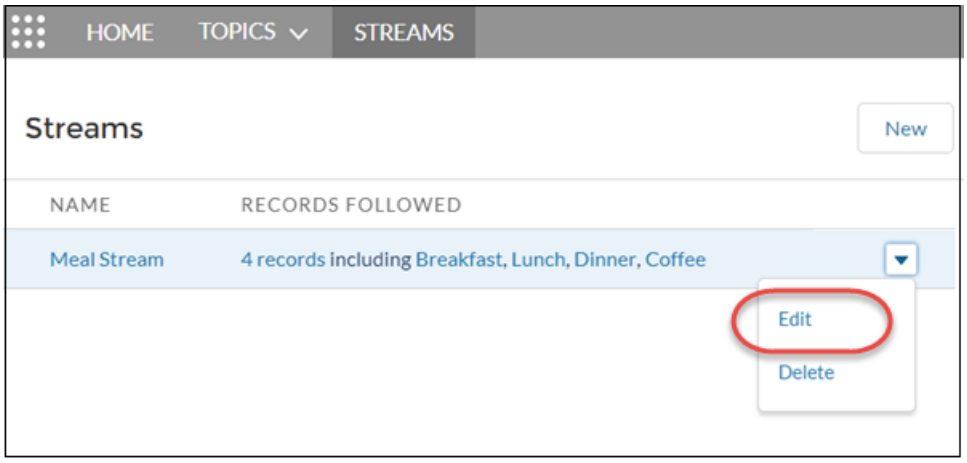
Edit a Chatter stream to add feeds to it or remove feeds from it. You can also change the stream's name.

1. Open the Streams page, and, from the row actions menu on the stream you want to change, select **Edit**.

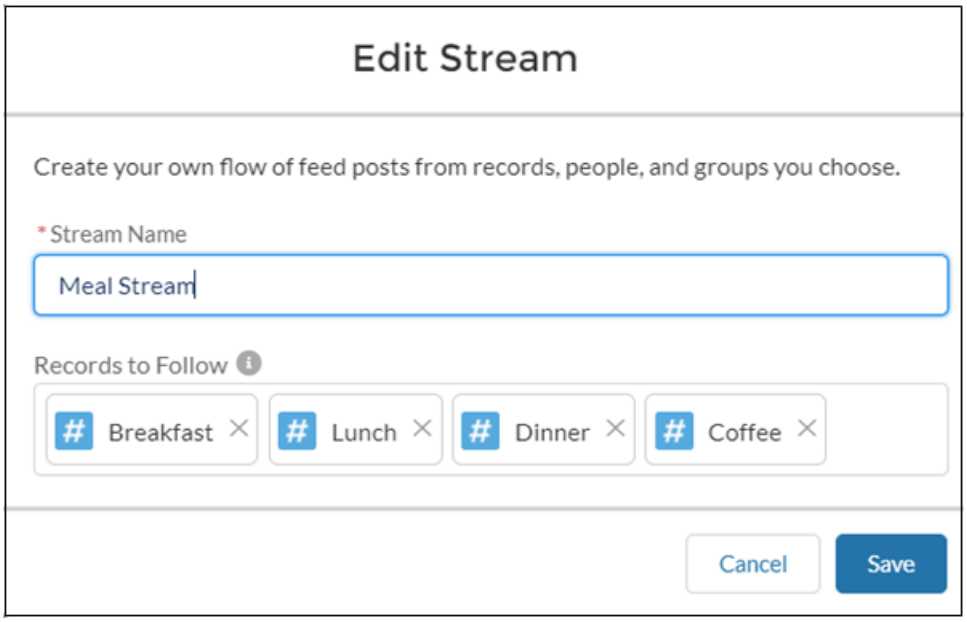
EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



2. In the Edit Stream dialog, change the values you want to change. For example, rename the stream, delete a stream feed (record), add more feeds of a different type or the same type.



When you delete a record from a stream, the stream retains the posts from the deleted feed up to the point of deletion. Deleting a record stops the flow of new information from that feed into the stream.

Note: When you add a Knowledge article to a stream, find the article by its ID number rather than its title.

3. Click **Save**.

View Community Streams from Your Internal Salesforce Org

Community members who have access to their internal Salesforce org can view their community streams from the org. When you click most community-based links from the internal org view, they lead right back to the community.

Besides normal feed actions, like answer, comment, mention, and like, here are actions you can take in community streams that you visit in your internal org.

- Upvote and downvote questions and answers, and see the impact in your community.
- Verify answers, and see the verification in your community.
- Click a link to a user profile, account, topic, or case, and jump to its home community.
- Add a topic, and it's added to your community.
- Click the timestamp on a post, and jump to the post detail view in its home community.
- Copy a link that leads to the item, person, or post detail view in its home community.
- Click a mention in a community stream, and go to its home community.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

There's no special setup to get links working between your community and your internal org. However, features, such as upvote and downvote and mark as company verified, do require that you enable them for your community.

Note:

- You can't create a community stream from your internal Salesforce org. Create streams from your community.
- Some Chatter features that are available in a community aren't available when you visit a community stream from your internal org. For example, file attachments, inline images, post sharing, and hover cards aren't available when you view community streams internally.
- Community topics don't appear when you view a stream from your internal Salesforce org. However, you can add topics.

SEE ALSO:

Enable Upvoting and Downvoting

Assign Permission to Verify Answers for Your Company

Share a Link to the Detail View of a Post

The Share feature on a feed post includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like.

Note: You don't get notified when someone shares a link to one of your posts.

1. Go to the post you want to share.
2. Click **Share.**
3. In the dropdown list, select **Copy Link**.
4. In the Copy Link to Thread dialog, click **Copy Link**.
   The link is copied to your clipboard.
5. Paste the link wherever you like, in an email, a message, or to a post on another feed.
   When you click the link, it jumps to the detail view of the post. In detail view, you can see the post, its attachments, and its comments.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community Cloud Cookies

Salesforce communities use cookies to improve functionality and speed up processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the community.

Salesforce communities collect three different types of cookies.

- **Required**—Strictly necessary for the website to function correctly.
- **Functional**—Used for analytics and performance.
- **Advertising**—Related to online behavioral advertising or collection of data for marketing purposes.

The following table describes the Community Cloud cookies collected by Salesforce.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** Editions.

Table 5: Salesforce Community Cookies

Cookie Name	Duration	Cookie Type	Description
`BrowserId`	Long	Functional	Used to collect metrics, such as the number of visitors to a community.
`autocomplete`	Long	Functional	Used to determine whether the browser remembers a user's login ID.
`clientSrc`	Session	Required	Used to authenticate a user.
`inst`	Session	Functional	Used to redirect a user to the correct Salesforce server.
`oid`	Long	Functional	Used to redirect a user to the correct Salesforce org and assist the user for the next login.
`oinfo`	Long	Functional	Used to track the state of a customer's org.
`sid`	Session	Required	Used to authenticate a user.
`sid_Client`	Session	Required	Used to authenticate a user.
`_ga`	Long	Functional	A third-party cookie that's used if the community admin chooses to track community users with a Google Analytics tracking ID on page 455.
`force-stream`	Long	Required	Used to redirect server requests for sticky sessions.
`renderCtx`	Session	Required	Used to track community context.
`webact`	Long	Functional	Used to collect metrics per page view for personalization.

Cookie Name	Duration	Cookie Type	Description
directMessageInboxVisitTimestamp	Long	Functional	Used by Direct Message to determine the last visit to the inbox.
<userId>feeds	Long	Functional	Used to store a user's feed settings selection.
RRetURL	Session	Required	Used to redirect user logins.
RSID	Session	Required	Used to redirect user logins.
pctrk	Session	Functional	Used to track public page views by guest users.

Communities Resources

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

	For End Users	For Admins
Guides and Tip Sheets		
Set Up and Manage Communities		✔
Communities Managers Guide		✔
Migrating From Portals to Communities		✔

INDEX

A

Account Brand Details component 210
Account Management
  Delegated External Administration 737–738
  Partner Community 737–738
Account Management component 211
Account Relationship
  Account Relationship Sharing Rules 744–745, 748–749, 751
  Channel Sales 744–745, 748–751
  Partner Central 744–745, 748–751
  Partner Relationship 744–745, 748–751
  Partner Relationship Management 744–745, 748–751
  Report 750
Account Relationship Data Sharing Rules
  Account Relationship 744–745, 748–749, 751
  Channel Sales 744–745, 748–749, 751
  Partner Central 744–745, 748–749, 751
  Partner Relationship 744–745, 748–749, 751
  Partner Relationship Management 744–745, 748–749, 751
Activity
  AppExchange reports and dashboards 661
Activity Timeline 211
add Einstein Next Best Actions to community pages 346
add flows to community pages 285
AppExchange 641, 645
AppExchange Package
  adoption insights 649
  communities 644, 682, 687, 692–693, 695
  community moderation 672
  content 646, 664
  Custom Report Type 687, 691
  custom report types 693
  customization 691
  customize 692
  Customize 692
  dashboards 656
  files 650, 664
  filter logic 693
  groups 651, 668
  home reports 657
  insights 650–651, 653
  licenses 682
  members 670
  Misc communities reports 680
  moderation insights 652
AppExchange Package *(continued)*
  new data 693
  overview reports and dashboards 659
  Q&A reports and dashboards 674
  recommendations 667
  reports 692
  reports and dashboards 646, 654, 656, 661–664, 666, 668, 670
  Salesforce Org Dashboard 682
  self-service insights 652
  Self-Service reports and dashboards 676
  service community 646
  service community scorecard 655
  topics 653
  Topics reports and dashboards 679
  unsupported Components 695
  Unsupported Components 645
  upgrade 644
  Upgrade 645
  what's new 639
  without Chatter 641
AppExchange Package with Chatter 641
Article Content component 214
Article list component 212
Article Type Filter component 213
Articles With This Topic component 215
Ask Button component 216
Audience 437

B

Back Button component 219
Branding tab 738
Branding Tab 735
breadcrumb component 220
Budget 761, 763
Budgets 762

C

Calendar 246
Campaign 221
Campaign Marketplace
  Best Practices 773
Case Attachments component 222
Case Banner component 223
Case Comments component 224
Case Comments Publisher component 227

Case Deflection component 225, 256, 263
Case Detail component 228
Case Feed component 229
Case Feed Publisher component 230
Case List component 232
Category Filter component 233
Category Navigation component 234
Channel Management
  Account Management 735, 737–738
  Partner Community 776
  Partner Scorecard 776
channel managers 725
Channel Marketing 772
Channel Partners 760
Channel Program 741–742, 744
Channel Program Groups 744
Channel Program Level 743
Channel Program Levels 744
Channel Program Member 744
Channel Programs 743
Channel Programs and Levels 741–742
Channel Sales 741
Chatter
  AppExchange 641, 662
  Communities 641
  cross-community streams 826
  edits 662
  move feed items in communities 121
  streams in communities 820–821, 824, 826
  verified answers in communities 116–117
Chatter Answers
  enabling in Communities 113
Claim 770
clickjack protection
  Communities 148
Close conversations in communities 817–819
CMS Connect HTML component 239
CMS Connect JSON component 235, 240–241, 244
Co Brand 735
Co-op 760–766, 768–771
Cobranding 772
communities
  best practices 165, 167–169, 172–175
  chatter 174
  custom domain 76
  custom login behavior with Apex 94, 104
  customer portals 784
  enable direct messages 125
  feed search 798
communities *(continued)*
  files 169, 175
  global search 798
  guest users 168–169, 172–176
  help center 787–789, 791–792
  lightning community page 172–173, 176
  objects 174
  partners 720–721, 724, 785
  search 798
  secure 162
  security 162, 165, 167
  self-service 787–789, 791–792
  SEO 168
  set landing tab 176
  sharing 32, 162, 165, 167
  sidebar search 798
  templates 787–789, 791–792
  test access 176
  unauthenticated public pages 183
Communities
  about 1
  adding a global search box 76
  App Launcher 794
  AppExchange 639, 641, 644–646, 649–657, 659, 661–664, 666–668, 670, 672, 674, 676, 679–680, 682, 687, 691–693, 695
  authentication 147–148
  basic setup 31
  Build Your Own template 193
  change case status 25
  change sets considerations 143
  clickjack protection 147–148
  close conversation 817, 819
  close conversation permission 818–819
  company verified answers 116–117
  Content Security Policy 156
  cookies 827
  create 186–187, 193
  creating 45
  cross-community streams 826
  CSP 156
  Customer Account Portal template 186
  customer account portals 784
  Customer Community Plus 25
  customer portal 186
  customer portals 784
  Deal Registration Reports 782
  default 122
  delete threads 816

Communities *(continued)*
deploy 143
direct messages 127
email 55
enabling 17
end-user experience 793
external user passwords 51
External users
51
resetting community passwords 51
GDPR 827
global header 794
Google Analytics 707–708, 710–718
Koa 199
Kokua 199
Lead Distribution Reports 781
leads 732, 752
Lightning 656
Market Development Fund Reports 782
migrate template 199
moderation execution 589
move feed items 121
navigating to 794
one-time passwords 59
other Salesforce features 105
Partner Central template 187
partner relationship management 719, 722, 786
partner roles 729
partner users 727
partners 187, 719, 722, 725–726, 728, 730, 732, 786–787
portals 723
post pinning 118–120
reporting for external users 702
reports, create 702
reputation points 634
Rich Publisher Apps 123
security 147–148
self-registration 177
setting up Chatter Answers 113
streams 820–821, 824, 826
Stricter CSP 156
template, considerations 68
templates 11
threaded discussions 813
threaded discussions, enable 815
translation in feeds 114
up and down vote 115
user lockout email 60
Communities Landing page
custom 182
community 706
Community 51, 641
Community Builder 82–83
Community Calendar 246
Community Cloud and Marketing Cloud 562, 564–567
community licenses
AppExchange 682
Community Management
Insights 647
Community Manager 552
Community Member Layout 735
Community members
updating with the API 52
Community Pulse 600
community role 22
Community Templates
self-service 184
Templates
184
self-service communities 184
community user license 41
Community User Visibility 51
Community users
delegating administration 734
company name 22
Components 201, 208
configurable self-registration
Login & Registration page 99
configurable self-registration page 99
Contact Support and Ask Buttons component 250
Contact Support Button component 249
Contact Support Form component 252, 256
Contact Support Page Activity report 712
Content Security Policy 156, 159, 161
content snapshot 83
Cookies
Communities 827
GDPR 827
Create Case Form component 254
create cases 173
Create Record Button component 257, 259
Criteria-Based Audience 437
CSP 156, 159, 161
Custom Recommendations 666
Custom Report Type
AppExchange 687

customer account portal
setup 785
Customer Account Portal
setup 785
customers
customer account portal 784
customer portal 784
Customizable User Settings component 261
customization
AppExchange
692
report columns 692
AppExchange package 691
reports and dashboards 691
Customization
AppExchange
692
Date 692
customize pages 180

D

Dashboard
AppExchange reports and dashboards 656
Dashboard component 262
Dashboard list component 263
Dashboards 641
data loader 41
deal registration
approval workflows 759
global action 758
lead page layouts 757
lead process 757
lead record types 758
opportunities 759
Partner Central 756
partner community 756
Deal Registration reports
Guided Setup reports 782
Default community 122
Delegated Account Management
Account Management 735
Partner Community 735
delegated administration
community users 734
Delegated External Administration
Account Management 737–738
Partner Community 737–738
direct messages
considerations 127
direct messages in communities
enable 125
Distributed Marketing 772

E

Einstein Analytics Dashboard 265
Embedded Appointment Management component 343
Embedded Service component 344
Employee Login Link component 375
Engagement component 267
events 706
Expanded Category Navigation component 268

F

Featured Data Categories component 269
Featured Search component 271
Featured Topic component 273
Featured Topics and Feeds component 301
Feed Compact component 278
Feed component 275
Feed History component 279
Feed Post & Comments component 280
Feed Publisher component 281
Feeds
move feed items in communities 121
files
AppExchange 664
Dashboards 664
Files List component 284
Filter Logic
AppExchange
693
reports 693
Flow Component 285
Follow Button component 289
Forgot Password component 376
Fund Allocation 764–766
Fund Allocations 765
Fund Claim 769–771
Fund Request 767–769
Fund Requests 767

G

GDPR
Communities 827
cookies 827
Global Search Box component 290
global search for peer to peer communities 291
Global Search Results component 292

Google Analytics
communities 707–708, 710–718
Contact Support Page Activity report 712
dashboards 715
Page Views by New and Returning Users report 712
Page Views by Salesforce Object report 713
Page Views by User Type report 714
Page Views dashboard 716–717
Search Activity dashboard 715
Search Activity report 714
User Flow 718
Google Analytics for Salesforce Communities
Contact Support Page Activity report 712
enable 708
install 710
overview 707
Page Views 716–717
Page Views by New and Returning Users 712
Page Views by Salesforce Object 713
Page Views by User Type 714
Search Activity 714–715
User Flow 718
Google Translation API key 114
Group Banner component 295
Group component 293
Group Detail component 295
Group Related List component 296
groups
AppExchange reports and dashboards 654, 656, 668
insights 651, 653
Guest user flows 287
guest user profile 164
guest user site record 167
Guided Setup
Deal Registration reports 782
Lead Distribution reports 781
Market Development Fund reports 782
Guided Setup Reports 781

H

High-volume portal users
sharing records or users 26
home reports
AppExchange reports and dashboards 657
HTML Editor component 299

I

implementation
Community Cloud 774
Insights
AppExchange 650
Communities 650

J

Journey Builder 562, 564–567

L

lead distribution
deal registration 760
lead assignment rules 755
lead page layouts 754
lead process 753
lead record types 755
Partner Central 752, 756
partner community 752
Lead Distribution reports
Guided Setup reports 781
Lead Inbox component 305
lead pass 752
Libraries component 307
Like
Use of up and down vote in lieu 115
login discovery page 93
Login Fields 377
Login page
branding 375

M

Market Development Claims 770
Market Development Fund reports
Guided Setup reports 782
Market Development Funds 760, 762, 765, 767
MDF 760–771
Member Profile and Settings component 307
members 22
Members
AppExchange reports and dashboards 670
Members tab 737
Members Tab 735
merge fields 57
Message Notification component 309
migrate community users 41
Moderation
AppExchange reports and dashboards 672

N

Navigation 375
Navigation Bar 309

Navigation Menu component 310
New Message Button 312
Notifications
default community 122

O

object access 82
one-time passwords 59
Overview
AppExchange reports and dashboards 659

P

Page Variation 437
Page Views 716–717
Page Views by New and Returning Users 712
Page Views by Salesforce Object 713
Page Views by User Type 714
partner accounts
disable 727
Partner Budget 761
Partner Central
Account Relationship 744–745, 748–751
Account Relationship Sharing Rules 744–745, 748–749, 751
approval workflows 759, 764, 768, 771
Channel Sales 744–745, 748–751
deal registration 756, 760
global action for deals 758
lead assignment rules 755
lead distribution 752, 756
lead page layouts 754, 757
lead process 753, 757
lead record types 755, 758
opportunities 759
Partner Relationship Management 744–745, 748–751
Report 750
setup 721
partner communities
approval workflows 759, 764, 768, 771
before setup 724
deal registration 760
global action for deals 758
lead assignment rules 755
lead distribution 756
lead page layouts 754, 757
lead process 753, 757
lead record types 755, 758
opportunities 759
prep your org 724
Partner Communities
disable partner accounts 727
partner community
calendar 732
events 732
lead assignment 752
setup 721
sharing rules 730
tasks 732
Partner Community
Account Management 735, 737–738
Branding tab 738
Campaign Marketplace 773
cases 732
Community Members 737
Delegated External Administration 735, 737–738
lead distribution 752, 756
Members tab 737
set up 722, 787
Partner Fund Allocation 764–766
Partner Fund Claim 769, 771
partner fund claims
approval workflows 771
Partner Fund Claims 770
Partner Fund Request 767, 769
partner fund requests
approval workflows 768
Partner Fund Requests 768
Partner Marketing Budget 761, 763
partner marketing budgets
approval workflows 764
Partner Marketing Budgets 762–763
partner portals
migration 723
Partner Relationship
Account Relationship 744–745, 748–751
Account Relationship Sharing Rules 744–745, 748–749, 751
Channel Sales 744–745, 748–751
Partner Central 744–745, 748–751
Partner Relationship Management 744–745, 748–751
Report 750
Partner Relationship Management
Partner Scorecard 775
Partner Scorecard
Channel Management 776
Partner Community 776
partner user profiles 728
Partner Username Uniqueness 730

partner users
create 727
partners
communities 720
Partner Central 720
roles 729
passwordless login
Login & Registration page 93
Path component 313
Paused Flows component 314
Polls
closing 817–819
portal
setup 32
Post pinning in communities 118–120
Posts
closing 817–819
pinning posts 118–120
threaded discussions 813
threaded discussions, delete 816
threaded discussions, enable 815
PRM 778
Profile Header component 315
Program Groups
Partner Scorecard 775
Programs and Levels 742
Public groups 775

Q

Q&A
AppExchange reports and dashboards 674
Questions
closing 817–819

R

recent messages 309
Recognition Badges 618–621, 623–624, 626–628
Recognition Badges component 317
Recommendations
AppExchange 666–667
FAQ 667
Recommendations Carousel component 319
Recommendations component 318
Record Banner component 320
Record Information Tabs component 322
Record List component 324
Record Related List component 327
Related Articles List component 329
Related List - Single component 328
Related Questions List component 329
Related Topics List component 330
report 706
Report
AppExchange 692
Groupings 692
Report Chart component 331
Report list component 332
Report Summary component 332
Reports 641
Reports and Dashboards 645
Rich Publisher Apps 123

S

Scroll to profile area 335
Search Activity 714–715
Search and Post Publisher component 337
Search component 336
Search in Communities
AppExchange reports and dashboards 663
Self Registration 379
Self-Service
AppExchange reports and dashboards 676
self-service insights
AppExchange report 652
send direct messages 312
SEO 82–83
Service Community Scorecard
AppExchange 646
Dashboards 646
service not available 180
Set Case Status Button component 342
sharing
CRM data 32
Sharing sets
overview 26
Social Login 381
Streams Detail component 345
Streams in communities
adding 821
deleting 824
editing 824
Streams List component 345
Suggested Action component 346
Survey component 347

T

Tabs component 348
tasks 706

Threaded discussions in communities
delete threads 816
enable 815
Tile Menu 349
Timeline 211
Toggle Button component 350
top articles by topic component 351
Topic Catalog component 352
Topic Description component 353
Topic Metrics component 354
Topics
AppExchange reports and dashboards 679
Topics component 355
Translation in communities 114
Trending Articles by Topic component 357
Trending Articles component 356
trending topics component 333, 358

U

Unanswered Questions component 359
unauthenticated users 164, 167
Up and down vote in communities 115
Upgrade
AppExchange 644
User Flow 718
user lockout email 60
User Profile action buttons 363
User Profile Image component 363
User Profile Knows About component 364
User Profile Menu component 366
User Profile Related List component 365
User Profile Stats component 368
User Profile Summary component 368
User Settings component 372

V

Verified answers in Chatter 116–117

W

Wave Dashboard component 265
Workspaces 600