Using Templates to Build Communities

Salesforce, Spring ‘18
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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 with minimal configuration in Site.com. This option doesn’t require programming experience or knowledge of the Lightning platform. Need help deciding on a template? Check out the [template comparison](#).
  - **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.
- Determine if any of the [community limits](#) will affect your implementation.

See also:

- [Choosing Between Lightning Communities and Tabs + Visualforce Communities](#)
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.

When you create a community, you can create a Lightning community or a Salesforce Tabs + Visualforce community. With either option, you can create branded, publicly available pages such as landing or marketing pages, and private custom pages that only community members can access.

So which option should you use? 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 preconfigured 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 a responsive self-service community using the Customer Service (Napili) template. To create Partner communities, use Partner Central.
- 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 you can add as a tab within your community.
- Build and iterate quickly using drag-and-drop reusable page elements.
- 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 multi-lingual experiences through Translation Workbench and Community Builder.
- Reuse your Visualforce pages, actions, buttons, links, and canvas apps in Lightning communities.
- To create and export industry-specific solutions and use them to jump-start new communities, or package and distribute them for others, use Lightning Bolt solutions.

Salesforce Tabs + Visualforce Communities

Suitable for developers with experience using Visualforce, Visualforce + Tabs lets you build custom pages and Web applications by inheriting Lightning Platform capabilities including analytics, workflow and approvals, and programmable logic. So if you are looking to create sites programmatically using Apex and APIs, Visualforce + Tabs is the way to go. Visualforce + Tabs offers:

- Supports high volume authenticated visitors and concurrent transactions while maintaining low page-load times.
- Full support for older browsers such as IE 9.
- Lightning platform capabilities including analytics, workflow and approvals, and programmable logic.
Choosing Between Lightning Communities and Tabs + Visualforce Communities

- Integration of partner apps (managed packages) that use Visualforce.
- Community rendering with 3rd-party web application frameworks.
- Integration of 3rd-party libraries.
- Support for dynamic web applications, such as an event management application.
- Harness Visualforce to 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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Lightning Communities</th>
<th>Tabs + Visualforce Communities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public pages</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Community templates (Koa, Kokua, Customer Service (Napili), Aloha, and Partner Central)*</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Authenticated pages*</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Lightning Bolt solutions</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Visualforce pages (Add Visualforce pages to Lightning communities using the Visualforce Page component in Community Builder.)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Audience targeting for pages and groups (Customer Service (Napili) and Partner Central templates only)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Custom theme layouts and pixel-perfect designs (Customer Service (Napili) and Partner Central template only)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Out-of-the-box login, logout, self-registration, and error pages</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Drag-and-drop environment</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Reusable components</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>IP restrictions</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Access to data, such as cases, leads, and opportunities</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ready-made forms</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Analytics and reports</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Programmatic page creation (using Apex, APIs, and controllers)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Web applications</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
Choosing Between Lightning Communities and Tabs + Visualforce Communities

<table>
<thead>
<tr>
<th>Feature</th>
<th>Lightning Communities</th>
<th>Tabs + Visualforce Communities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflows</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Full Lightning platform capability</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

*Available in Community Builder for Communities users only.
WHICH COMMUNITY TEMPLATE SHOULD I USE?

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

Community Builder makes it super easy to customize your community. Simply edit a few components to include information about your community, add images to extend your branding, and you're ready to go—without any coding! Also, if you want a more custom experience, you can create custom pages, add components to pages, use custom Lightning components, and expose more Salesforce objects.

A wizard guides you through selecting a template and then walks you through the initial setup, including topic and data category setup.

- **Customer Account Portal** is a private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by allowing customers to see and pay invoices, update their account information, and search your knowledgebase for answers to their most frequent questions.

- **Partner Central** is an online space to recruit, educate, and drive sales together with your partner users. Configure lead distribution: create a shared pool of leads visible to all your partners. Users can accept leads through the nifty Lead Inbox component. Allow partners to register deals and stake an early claim on the leads they have a headstart on. Expose more CRM objects to drive channel sales and marketing, track opportunity conversion and closure, and share sales and training assets with your partners.

- **Customer Service (Napili)** is a powerful, responsive self-service template that 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.

- **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. Customize your branding and themes to refine the look of your community.

- **Salesforce Tabs + Visualforce** provides standard Salesforce structure and tabs that you can customize using Visualforce. Allows full platform access with a flexible configuration. Requires developer experience and advanced setup skills. Supports most standard objects, custom objects, and the Salesforce app. Keep in mind that the Salesforce Tabs + Visualforce template doesn’t work with Community Builder.

- **Kokua** is a visually rich self-service template that presents users with knowledge articles organized by data categories. Users can also submit cases to get help from agents.

- **Koa** is a text-based self-service template that’s optimized for mobile devices. It lets users search for and view articles by text representations of data categories, and contact support if they can’t find what they’re looking for.

- **Customer Service (Napili)** template lets your customers post questions to the community and search for and view articles. If they don't find what they're looking for, they can contact a support agent.

💾 **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.

Compare Features Available in Community Templates

Thinking about using a template to build your community? There are major differences between the features available in each community template. Before you decide on which template to use, compare them.
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 (Napili) 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 (Napili) template.

Compare Features Available in Community Templates

Thinking about using a template to build your community? There are major differences between the features available in each community template. Before you decide on which template to use, compare them.

Feature Comparison

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.

<table>
<thead>
<tr>
<th></th>
<th>Customer Service (Napili)</th>
<th>Partner Central</th>
<th>Customer Account Portal</th>
<th>Salesforce Tabs + Visualforce</th>
<th>Koa and Kokua</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most standard Salesforce objects</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Campaigns</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Cases</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Community Builder</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Discussions</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contacts and Shared Contacts</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contacts to Multiple Accounts</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Objects</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customizations using Lightning Components</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 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.

<table>
<thead>
<tr>
<th>Objects Supported by Out-of-the-Box Components and Pages</th>
<th>Customer Service (Napili)</th>
<th>Partner Central</th>
<th>Customer Account Portal</th>
<th>Salesforce Tabs + Visualforce</th>
<th>Koa and Kokua</th>
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</thead>
<tbody>
<tr>
<td>Customizations using Visualforce</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Salesforce Knowledge</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓ Recommended</td>
<td>✓ Required</td>
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<tr>
<td>Knowledgeable People</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leads</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Optimized for Mobile</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Orders</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question-to-Case Recommendations</td>
<td>✓</td>
<td></td>
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<tr>
<td>Recommendations</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
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</tr>
<tr>
<td>Recommendations Carousel</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Reputation</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topics</td>
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<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trending Articles</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visualforce Page (Add Visualforce pages to Lightning communities using the Visualforce Page component in Community Builder.)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Which Community Template Should I Use?

| Objects Supported by Out-of-the-Box Components and Pages in Community Templates |
|---|---|---|
| **Headline** | **Navigation Menu** | **Create Record Button** |
| **Record Banner** | **Object Home Page** | **Create Record Form** |
| **Record Detail** |  |  |
| **Record Information** |  |  |
| **Tabs** |  |  |
| **Related Records** |  |  |

<p>| Account (Account) | ✔ | ✔ | ✔ |
| Activity History (ActivityHistory) | ✔ |  |  |
| Approval History (ProcessInstanceHistory) |  | ✔ |  |
| Approval Process Work Item (ProcessInstanceWorkItem) |  | ✔ |  |
| Approval Step (ProcessInstanceStep) |  | ✔ |  |
| 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 | ✔ |  |  |
| Dashboard (Dashboard) |  |  | ✔ |
| Email Message (EmailMessage) |  |  | ✔ |
| Event (Event) | ✔ |  |  |
| External Objects | ✔ |  |  |
| Group (CollaborationGroup) |  | ✔ |  |
| Lead (Lead) |  | ✔ | ✔ |</p>
<table>
<thead>
<tr>
<th>Objects Supported by Out-of-the-Box Components and Pages in Community Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which Community Template Should I Use?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Headline</th>
<th>Record Banner</th>
<th>Record Detail</th>
<th>Record Information Tabs</th>
<th>Related Records</th>
<th>Navigation Menu</th>
<th>Object Home Page</th>
<th>Create Record Button</th>
<th>Create Record Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note (Note and NoteAndAttachment)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Open Activity (OpenActivity)</td>
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<td></td>
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<tr>
<td>Opportunity (Opportunity)</td>
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<td></td>
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<td>Opportunity Contact Role (OpportunityContactRole)</td>
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<td></td>
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</tr>
<tr>
<td>Opportunity Product (OpportunityLineItem)</td>
<td>✓</td>
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<td></td>
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<td></td>
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<td>Order (Order)</td>
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<td></td>
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Customer Service (Napili)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 (Napili) template.

Have you considered everything on these lists?

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 the Global Header for Communities for the system administrator profile and any other profiles that can access your community from the internal org.

- Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge and Snap-ins.
- 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.

Prerequisites for Creating Customer Service (Napili) Communities

Before you create your self-service community, you’ll need to complete a few setup tasks.
Prerequisites for Creating Customer Service (Napili) Communities

USER PERMISSIONS

| To create, customize, or publish a community: | Create and Manage Communities |
| To enable Communities: | Customize Application |
| To create article types and article actions: | Manage Salesforce Knowledge |
| To create accounts: | Create on Accounts |
| To create or edit internal users: | Manage Users |
| To create or edit guest and other external users: | Manage External Users |
| To upload branding images and email templates: | Create on Documents |
| To create contacts: | Create on Contacts |
| To create data categories: | Manage Data Categories |

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Before you create your self-service community, you’ll need to complete a few setup tasks.

This guide is designed to use with Salesforce Developer, Enterprise, Unlimited, or Performance Editions. Contact Salesforce to ensure that you have the correct user and feature licenses. You also need permission to set up and administer Cases, Communities, and Salesforce Knowledge. Refer to the Salesforce Help for more information on licenses and editions that support Communities.

Communities supports all internal and portal licenses including existing Customer Portal, Authenticated Website, and partner portal licenses. Communities doesn’t support the Chatter External license.

Note: As you’re following this guide, if you can’t access a feature, make sure that you’ve got the correct licenses and permissions to administer that feature.

If you’re creating an entirely new community or you’re adding self-service functionality to your existing community, follow these steps:

- **Enable Salesforce Communities** in your organization and create a community. For detailed instructions on setting up a community, see the Salesforce Help.
- **Set up Salesforce Knowledge** and create and deploy the article types. If you’re setting up the Customer Service (Napili) template to use cases and discussions only, you can skip setting up Salesforce Knowledge.
- **Set up data categories** to organize and control access to your articles.
- **Upload the images** you’ll use to represent data categories and to extend your company’s branding if you’re using a template based on data categories.
- If the template you’re configuring uses topics to display articles and questions, **create topics and associate them with data categories**.
- **Create a case publisher action** that creates cases for authenticated users. To learn about actions, see “Actions Overview” in the Salesforce online help.
- **Configure the guest user profile** to specify permissions and define access for your community.
- **Create a case publisher action** that creates cases for unauthenticated users, if you want to let guest users create cases.
- **Create a case assignment rule** so that cases created from your community are assigned to your support agents. For more information on case assignment rules, see the Salesforce Help.
Optionally, to let guest users create a case without signing in, enable Web-to-Case along with a case publisher action for guest users.
Be aware of the limitations that apply to Lightning communities such as Customer Service (Napili) and Partner Central.

**General Limitations**

- Lookup fields aren’t supported for custom objects or in template-based communities created before Spring ’16.
- 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 (Napili) 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.
- 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:

```javascript
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:** For the list of Salesforce supported browsers, see the section on supported browsers in Salesforce Help.
CREATING COMMUNITIES WITH TEMPLATES

Switch On Salesforce Communities

The first step in setting up your self-service community is to flip the switch to enable Salesforce Communities.

Note: Once you enable Communities, you can’t turn it off.

1. From Setup, enter Communities Settings in the Quick Find box, then select Communities Settings.
2. Select Enable Communities.
3. Next, enter a unique value to be used as your domain name and click Check Availability to make sure it’s not already being used by someone else.
   It’s a good idea to use something recognizable to your users, such as your company name. Although the domain name is the same for all communities, you create a unique URL for each community during the creation process.
   Note: Keep in mind that you can’t change the domain name after you save it. You’ll have to call Salesforce to change it.
4. Click Save, and make sure you click OK on the confirmation message page to enable the community.

Create Communities

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

The number of communities you can create for your organization is listed on the All Communities page in Setup.

1. To start creating communities, from Setup, enter Communities in the Quick Find box, select All Communities, then click New Community.
   The Community Creation wizard appears, with different out-of-the-box template options for you to choose from. If you have Lightning Bolt solutions available in your org, you see them in the wizard as well.
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 allowing customers to see and pay invoices, update their account information, and search your knowledgebase 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 (Napili)
A powerful, responsive self-service template that 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.

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. Customize your branding and themes to refine the look of your community.

Salesforce Tabs + Visualforce
Standard Salesforce structure and tabs that you can customize using Visualforce. Allows full platform access with a flexible configuration. Requires developer experience and advanced setup skills. Supports most standard objects, custom objects, and the Salesforce app. Keep in mind that the Salesforce Tabs + Visualforce template doesn’t work with Community Builder.

Kokua
A graphic-based community ideal for handling simple customer interactions. Community members can search for and view articles, and contact support. Requires Knowledge and supports cases.

Koa
A text-based community ideal for handling simple customer interactions. Community members can search for and view articles, and contact support. Requires Knowledge and supports cases.

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

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.

3. Select the template that you want to use.
4. Read the template description and key features, and click Get Started.
5. If you selected Koa or Kokua, specify the categories and Company Name for your template, then click Next.

Data Category Group Name
Unique name of the data category group that contains the data categories for your site. The name reflects the hierarchy of categories that you’ve set up for your community and is used throughout the site to organize articles.

Top Level Category
Highest-level category that you want to display. Only the children of this category appear in the community. You can have several nested layers of categories above this category, but the page shows this category as the parent and show its subcategories as children.

Company Name
Name of your company as you want it to appear in the community header.

6. Enter a community name.

Note: If you’re creating multiple communities, keep in mind that community names are truncated in the global header drop-down menu. Users can see up to 32 characters of the name, and the Preview and Inactive status indicators count toward that number. Make sure that the visible part of the name is distinctive enough for users to distinguish between multiple communities.
7. Enter a unique value at the end of the URL field. This value is appended to the domain you entered when enabling communities to create a unique URL for this community. For example, if your domain is UniversalTelco.force.com and you’re creating a customer community, you can designate the URL as UniversalTelco.force.com/customers.

Note: You can create one community in your organization that doesn’t have a custom URL.

You can change your community name and URL after the community is activated, but users won’t be redirected to the new URL. If these changes are necessary, be sure to inform your community members before changing it.

8. 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, default pages for login, self-registration, change password, forgot password, and your home page are set based on your community template. You can customize or change these default pages at any time in Community Management or Community Workspaces.

Important: After you create a community, your profile is automatically added to the list of profiles that have access. As a result, all users with this profile can log in to the community once 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.

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.

Access the Community Management Page
Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

Customize Communities Preferences
Enable or disable content flagging, reputation, public access, and knowledgeable people in your community.

Use Profiles to Manage Community Membership
Profiles help manage community membership and access to information. You’ll need to create a profile for both guest and authenticated users.

Configure the Guest User Profile for Unauthenticated Users
A guest user profile is designed for public users who access your community. Before you publish your community, create a guest user profile so that your customers can view and interact with your community before they sign in.

Organize Customer Communities with Topics
Navigational and featured topics are a fantastic way to organize 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. You can use topics in the communities built using the Customer Service (Napili) template.
Import Image Files to the Assets Folder for Koa and Kokua
Adding images to your community extends your branding and gives your users a visual representation of your community’s data categories.

SEE ALSO:
Prerequisites for Creating Customer Service (Napili) Communities
Customer Service (Napili) Community—Setup Checklist
Create a Partner Community with Partner Central—Setup Tasks
Edit Community Pages and Components in Community Builder
Manage Your Community’s Pages and Their Properties in Community Builder
Navigate Community Builder
Theme Your Community with Community Builder
Implementation Guide: Using Templates to Build Communities
Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity
Community Builder Overview

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

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.

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### Access the Community Management Page

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

To access the Community Management page, you must be logged in to the community.

1. **Access Community Management.**
   - From the community, use the drop-down menu next to your name and click **Community Management**.
   - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

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.

Customize Communities Preferences

Enable or disable content flagging, reputation, public access, and knowledgeable people in your community. To use these settings, first enable Chatter in your organization.

1. Open Community Workspaces or Community Management.
2. Click Administration > Preferences.
3. Change the following settings, as appropriate:

   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.
   - **Use custom Visualforce error pages**, if you want authenticated users to see your custom branded Visualforce error pages.
   - **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** within your community. Members can flag items that contain inappropriate language or sensitive information.
   - **Enable Reputation** to 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** so 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 (Beta)** 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.
Use Profiles to Manage Community Membership

Profiles help manage community membership and access to information. You’ll need to create a profile for both guest and authenticated users.

With profiles, you can grant or remove access for group of users simply by changing the access of the profile or permission set. Once you add a profile to the community, all users assigned to it become members of the community—so it makes adding members simple!

Note: Existing communities that still use High Volume Customer Portal profiles can still use this profile to manage users.

1. From Setup, enter Profiles in the Quick Find box, then select Profiles.
2. In the Profiles list page, click New Profile, then select the Customer Community User profile.
3. Type Self-Service Community User as the new profile name.
4. Click Edit.
5. Accept the default values in the Administrative Permissions, General User Permissions, and Standard User Permissions sections.
6. In the General User Permissions section accept the default settings and select Assign Topics and Create Topics.
7. In the Standard Object Permissions section accept the default settings and select Read, Create, and Edit for Cases.
8. If you’re enabling knowledge articles in your community, in the Article Type Permissions section, make sure that Read is selected for the article types you’ve created.
   Customers should be able to read articles, but not make any changes to them.
9. Click Save.

Configure the Guest User Profile for Unauthenticated Users

A guest user profile is designed for public users who access your community. Before you publish your community, create a guest user profile so that your customers can view and interact with your community before they sign in.

When Communities is enabled, guest users have access to public pages in your communities. However, to allow guest users to view or submit data to a standard or custom object, modify the object’s permission in the community’s guest user profile. Each community has a separate Guest User license, so you can control access to objects (including lookup fields) on a per-community basis.

Note: You must set field-level security if you use your guest user license for case creation.

1. From Community Builder, click the Settings icon, and select General.
2. Click the link for the profile name under Guest User Profile.
3. Click Edit.
4. Scroll down to the Standard Object Permissions section.
5. On the Cases object, select Read and Create.
   Note: Are you using more than one case record type in your org? If so, don’t use the Master Record Type as the Assigned Record Type or the Default Record Type on the guest user profile.
6. Scroll down to Article Type Permissions and select Read for the articles you’ll display in your community.
7. Scroll down to Category Group Visibility Settings.
8. Click Edit next to the Category Group for your community.
9. Select a visibility setting.
**Visibility Setting** | **Description**
--- | ---
All Categories | Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to **All Categories**.
None | Users can't see any categories in the category group.
Custom | Users can see your custom selection of categories. For roles, you can choose from the categories that are visible to the parent role. If the parent role’s visibility changes to be less than its child’s visibility, the child role’s category visibility is reset to its parent’s category visibility.

To select categories, double-click the category in the **Available Categories** box. Alternatively, select a category and then click **Add**. Selecting a category implicitly includes its child and parent categories as well. Categories that are grayed out are not available for selection because their parent has already been selected.

**Note:** If you are customizing a role, permission set, or profile that was set to All Categories, remove **All** from the **Selected Categories** box and then select specific categories.

**Example:** Sample Guest User Profile link in Community Builder

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**Organize Customer Communities with Topics**

Navigational and featured topics are a fantastic way to organize 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. You can use topics in the communities built using the Customer Service (Napili) template.
In Community Workspaces or Community Management, choose navigational topics and subtopics to provide a consistent map of your community. Use featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

In a self-service community, the Customer Service (Napili) template specifies the layout and design of navigational, featured, and member-created topics.

Tip: To add navigational and featured topics to other types of communities, Apex developers can use the `ConnectApi.ManagedTopics` class in a Visualforce page.

**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.
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.)

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.)

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.

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 Topics by clicking Content Targeting > Topics > Navigational Topics. If you’re using Community Management, access 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 drop down menu (under Show the 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 step above.

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.

   The following is the maximum number of navigational topics and subtopics you can have in a Customer Service (Napili) community template.

<table>
<thead>
<tr>
<th>Level</th>
<th>Maximum Number of Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>One (parent)</td>
<td>25</td>
</tr>
<tr>
<td>Two (subtopic)</td>
<td>10</td>
</tr>
<tr>
<td>Three (subtopic)</td>
<td>10</td>
</tr>
</tbody>
</table>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: 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
Using functionality in Chatter REST API and Chatter in Apex, you can add up to eight levels to your navigational topics.

Tip: To quickly edit existing navigational topics, simply hover over a topic name, and do any of following:

• 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 🖌.

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 Topics by clicking Content Targeting > Topics > Featured Topics. If you're using Community Management, access 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 quickly edit existing featured topics, simply hover over a topic name, and do any of following:

• To move topics up or down, click the arrows at left.
• To delete topics or change their thumbnail images, click 🖌.

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 rename topics: Edit Topics

Editions

Available in: Salesforce Classic and Lightning Experience
Available in: 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

Editions

Available in: Salesforce Classic and Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions
As the number of topics in a community grows, curate them to improve usability. Whether you've enabled Community Workspaces or are working in Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access Topics by clicking Content Targeting > Topics > Topic Management. 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, which will boost SEO.
   - To combine existing 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.
   - To rename or delete an existing topic, or add a description to it, click .
     If you don't see a topic you want to rename or delete, either search for it or click Show More below the topic list.

Tip: For communities with a global audience, you can translate names and descriptions of navigational and featured topics. From Setup, search for and select Translate. Then select the Managed Topic setup component, and expand a community to see its master topic names.

Import Image Files to the Assets Folder for Koa and Kokua

Adding images to your community extends your branding and gives your users a visual representation of your community's data categories.

Let’s say that your community has an All Recipes data category group with categories for Desserts, Main Dishes, Salads, and so on. To add visual interest, you want to display images that represent each of the categories in the Featured Categories component. Before you begin setting up your community, you need to upload image files to the Assets folder on the Overview tab of Site.com Studio.

Each category can have one image associated with it, which appears in a square frame on the category page or a rectangular frame in the Search bar. 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. The file names for your images must match exactly the name of each data category and must include a notation for square images (s) or wide images (w). So, for a data category with the name Desserts, the corresponding square image file should be named Desserts-s.jpg.

After you’ve uploaded your images to Site.com's Assets page, you can enter a relative URL and use the expression {!Global.PathPrefix}/{{DataCategory.Name}}.jpg in a component's Category Image URL field. 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. If you upload to sub-folders in the Assets page, you’ll need to use the expression:

{{Global.PathPrefix}/<Name of the Subfolder>/<DataCategory.Name}.jpg

For example, if you upload images to a sub-folder on the Assets page, use the expression:

{{Global.PathPrefix}/assets/{{DataCategory.Name}}.jpg

To use images from another source, enter http://<other source>/{{DataCategory.Name}}.jpg.

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.

You can add images to the following components:
**Featured Categories**

This component displays a title and a square image for each category within a group of data categories. The recommended file size is up to 400 KB. The recommended frame size for this image file is 480 x 480 pixels.

When you create the images, be sure to name them according to the following convention:

<datacategoryname>-s.jpg

**Featured Search**

This component displays an image in the search bar for the selected data category. The recommended file size is up to 1 MB. The recommended frame size for this image is between 1280 – 2560 pixels wide by 175 pixels high. Images with an aspect ratio of 3:1 (wide and relatively short) will provide the best results.

When you create the images, be sure to name them according to the following convention:

<datacategoryname>-w.jpg

**Note:** The components that show the user’s profile image don’t require that you upload any images.
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.
- 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 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.

### Create a Partner Community with Partner Central—Setup Tasks

<table>
<thead>
<tr>
<th>Planning</th>
<th>Prep Your Salesforce Org for a Partner Community</th>
<th>Set Up the Channel Manager Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What’s Your Partner Community Strategy?</td>
<td>• Prep Your Salesforce Org for a Partner Community</td>
<td>• Set Up the Channel Manager Role</td>
</tr>
<tr>
<td>• Buy Partner Licenses</td>
<td>• Create Partner Accounts</td>
<td>• Create Partner Users</td>
</tr>
</tbody>
</table>

Get started with this handy recipe of setup tasks to create your own community with Partner Central.
# 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.

<table>
<thead>
<tr>
<th>Set Up a Partner Community</th>
<th>Advanced PRM and Community Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What Template Can I Use?</td>
<td>• Lead Distribution</td>
</tr>
<tr>
<td>• Compare Features Available in Community Templates</td>
<td>• Deal Registration</td>
</tr>
<tr>
<td>• Lightning Communities Limitations</td>
<td>• Market Development Fund on page 62</td>
</tr>
<tr>
<td>• Update Org-Wide Settings</td>
<td>• Channel Programs and Levels on page 51</td>
</tr>
<tr>
<td>• Check Out Community Workspaces</td>
<td>• Community Moderation</td>
</tr>
<tr>
<td>• Create Communities</td>
<td>• Direct Messaging</td>
</tr>
<tr>
<td>• Share More Salesforce Records in Your Community</td>
<td>• Configure Dashboards to Monitor Your Community</td>
</tr>
<tr>
<td>• Add more features with Guided Setup on page 31</td>
<td>• Create Pages and Groups Targeted at Specific Audiences</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community Design</th>
<th>Community Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Customize Your Community (Builder)</td>
<td>• Community reports and dashboards</td>
</tr>
<tr>
<td>• Customize Community Pages and Components (Builder)</td>
<td>• Custom Reports</td>
</tr>
<tr>
<td>• Customize Community Navigation</td>
<td>• Report Management for Partners</td>
</tr>
<tr>
<td>• Which Components Can I Use with Partner Central?</td>
<td>• AppExchange Reporting Packages for Communities</td>
</tr>
<tr>
<td>• Customize the Lead Inbox</td>
<td>• Google Analytics™</td>
</tr>
<tr>
<td>• Customize the Quick Create Actions</td>
<td></td>
</tr>
</tbody>
</table>
Click **Overview** to get a description of the feature and the setup tasks.

**What Is Lead Distribution?**

Lead distribution lets you automatically assign leads to your channel partners. Give them leads acquired from your website, marketing campaigns, or referral programs. Partners accept leads directly from the lead inbox on their Partner Central portal.

**Your Setup Tasks**

Our guided setup walks you through setting up:

- Security and Visibility Settings
- Lead Processes
- Lead Queues
- Lead Record Types
- Assignment Rules
- Page Layouts
- Community Experience

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.

Lead Distribution Reports

These reports are provided in the Lead Distribution Reports folder.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Additional Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unassigned Leads</td>
<td>Number of unassigned partner leads.</td>
<td>Replace lead owner ID filter with the queue record ID.</td>
</tr>
<tr>
<td>Unassigned Leads by Age</td>
<td>Displays unassigned leads by age.</td>
<td>Replace the lead owner ID filter with the queue record ID.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add the Lead Age formula field: ( \text{ROUND}(\text{NOW}()-\text{CreateDate}, 0) )</td>
</tr>
<tr>
<td>Lead Creation Trend</td>
<td>Number of partner leads created.</td>
<td>Replace the lead owner ID filter with the queue record ID.</td>
</tr>
<tr>
<td>Leads by Partner</td>
<td>Number of leads owned by partner.</td>
<td>Tip: Add an age filter to Leads</td>
</tr>
<tr>
<td>Leads by Stage</td>
<td>Displays partner leads by stage.</td>
<td>N/A</td>
</tr>
<tr>
<td>Leads by Source</td>
<td>Displays partner leads by channel.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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 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
### Deal Registration Reports

These reports are provided in the **Deal Registration Reports** folder.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Additional Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Approved Deals by Month</td>
<td>Number of approved deals for current fiscal year by month.</td>
<td>Update lead source and lead status filters with the correct filter values</td>
</tr>
<tr>
<td>Approved Deals by Value</td>
<td>Total value of approved deals.</td>
<td>Update lead source and lead status filters with the correct filter values</td>
</tr>
<tr>
<td>Approved to Converted Ratio</td>
<td>Ratio of deals approved to deals converted for the current fiscal year by partner.</td>
<td>N/A</td>
</tr>
<tr>
<td>Closed Deals by Partner</td>
<td>Displays the value closed deal registered by partners.</td>
<td>N/A</td>
</tr>
<tr>
<td>Deals Registered by Age</td>
<td>Displays registered deals by age.</td>
<td>Add Age custom field</td>
</tr>
<tr>
<td>Deal Registration Trend</td>
<td>Displays deal registration over time.</td>
<td>Update lead source and lead status filters with the correct filter values</td>
</tr>
</tbody>
</table>
| 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.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Additional Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Budget</td>
<td>Amount of total marketing budget.</td>
<td>N/A</td>
</tr>
<tr>
<td>Report Name</td>
<td>Description</td>
<td>Additional Customization</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------------------------------------------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Allocated Budget</td>
<td>Total number of budgets allocated to partners.</td>
<td>N/A</td>
</tr>
<tr>
<td>Approved Fund Requests</td>
<td>Total approved fund requests.</td>
<td>N/A</td>
</tr>
<tr>
<td>Approved Claims</td>
<td>Total approved claims.</td>
<td>N/A</td>
</tr>
<tr>
<td>Paid Claims</td>
<td>Total paid claims.</td>
<td>N/A</td>
</tr>
<tr>
<td>Remaining Budget</td>
<td>Amount of budget available.</td>
<td>N/A</td>
</tr>
<tr>
<td>Remaining Allocated Funds</td>
<td>Amount of allocated funds available.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Request Drafts</td>
<td>Number of fund requests in draft status.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Requests by Status</td>
<td>Displays fund requests by approved or rejected status.</td>
<td>N/A</td>
</tr>
<tr>
<td>Submitted Fund Requests</td>
<td>Number of fund requests submitted.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Requests by Activity</td>
<td>Number of approved fund requests by activity.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Requests by Type</td>
<td>Number of approved fund requests by type.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Claim Drafts</td>
<td>Number of fund claims in draft status.</td>
<td>N/A</td>
</tr>
<tr>
<td>Fund Claims by Status</td>
<td>Displays fund claims by approved or rejected status.</td>
<td>N/A</td>
</tr>
<tr>
<td>Funds Used vs. Allocated by Type</td>
<td>Displays funds used vs. funds allocated by type.</td>
<td>N/A</td>
</tr>
<tr>
<td>Funds Used vs. Allocated by Budget</td>
<td>Displays funds used vs. funds allocated by budget.</td>
<td>N/A</td>
</tr>
<tr>
<td>Funds Used by Partners</td>
<td>Displays requested funds vs. allocated funds by partner.</td>
<td>N/A</td>
</tr>
<tr>
<td>Leads from Campaigns</td>
<td>Number of leads created by campaigns funded with marketing funds.</td>
<td>N/A</td>
</tr>
<tr>
<td>Lead Conversion Rate</td>
<td>Percentage of leads converted from campaigns funded with marketing funds.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Sales from Campaigns</td>
<td>Amount of sales generated from campaigns funded with marketing funds.</td>
<td>N/A</td>
</tr>
<tr>
<td>Win/Loss Ratio</td>
<td>Won or lost ratio of opportunities from campaigns funded with marketing funds.</td>
<td>N/A</td>
</tr>
<tr>
<td>ROI</td>
<td>Total opportunities won by total funds spent.</td>
<td>N/A</td>
</tr>
<tr>
<td>ROI by Activity</td>
<td>Total opportunities won by total funds spent grouped by activity.</td>
<td>N/A</td>
</tr>
<tr>
<td>Average Time to Approve Request</td>
<td>Average number of days to approve a fund request.</td>
<td>N/A</td>
</tr>
<tr>
<td>Average Time to Approve Claim</td>
<td>Average number of days to approve a fund claim.</td>
<td>N/A</td>
</tr>
<tr>
<td>Average Time to Pay Claim</td>
<td>Average number of days to pay an approved a fund claim.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
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.

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 (Napili). 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.

Still confused? Compare the features available in all community templates.

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?

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.

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.
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 you 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.

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 “Permissions:ManagePartners” 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 a 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 new 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 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.

Once 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.
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.

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.

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.
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.
• 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.

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

<table>
<thead>
<tr>
<th>USER PERMISSIONS</th>
<th>Available in: Salesforce Classic and Lightning Experience&lt;br&gt;<strong>EDITIONS</strong> Available in: <strong>Enterprise</strong>, <strong>Performance</strong>, <strong>Unlimited</strong>, and <strong>Developer</strong> Editions</th>
</tr>
</thead>
<tbody>
<tr>
<td>To manage partner users:</td>
<td>Manage External Users</td>
</tr>
<tr>
<td>To create, edit, and delete profiles:</td>
<td>Manage Profiles and Permission Sets</td>
</tr>
<tr>
<td>To create, edit, and delete page layouts:</td>
<td>Customize Application</td>
</tr>
<tr>
<td>To set field-level security:</td>
<td>Manage Profiles and Permission Sets AND Customize Application</td>
</tr>
<tr>
<td>To set sharing rules:</td>
<td>Manage Sharing</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Group or Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Partner Portal Users group</td>
<td>Contains all partner users in your organization</td>
</tr>
<tr>
<td>All Internal Users group</td>
<td>Contains all Salesforce users in your organization</td>
</tr>
<tr>
<td>Roles and Internal Subordinates sharing rule category</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.
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. Additionally, partner users can edit leads, create leads, import leads, and also mass update leads in a list view.

1. Open Community Workspaces or Community Management.
2. Click AdministrationTabs, 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. We recommend using a permission set if you plan to apply these permissions selectively.
   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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Partner User Permission Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>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 &amp; Contacts link on the Accounts and Contacts tabs in your community.</td>
<td>“Import Leads” AND Optionally, “Import Personal Contacts”</td>
</tr>
<tr>
<td>To change the status of multiple leads via the Change Status button.</td>
<td>“Manage Leads”</td>
</tr>
<tr>
<td>To change the owner of multiple leads via the Change Owner button.</td>
<td>“Transfer Leads”</td>
</tr>
</tbody>
</table>
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.

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 they should perform. 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 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

EDITIONS

Available in: Salesforce Classic 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 access all data owned by or shared with other partner users with the same role or below them in their role hierarchy. For example, you can allow a manager in your partner accounts to view data from other managers and their direct reports.

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.

<table>
<thead>
<tr>
<th>Partner Super Users with Role</th>
<th>Can Access Data Owned By or Shared With</th>
</tr>
</thead>
</table>
| 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
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

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.

You can’t edit standard profiles. You can add Delegated External User Administrator to a permission set that you assign to a standard profile.

1. From Setup, enter Profiles in the Quick Find box, then select Profiles and click a custom profile.
2. Click Edit.
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.

Consider the following when setting up delegated external user administration.

- You can grant delegated administration rights using permission sets.
- 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.

SEE ALSO:
- Share More Salesforce Object Data in Your Community
- Add Tabs to Your Community
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.

<table>
<thead>
<tr>
<th>Role or Community User Allocations</th>
<th>Allocation</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total roles used in customer and partner communities</td>
<td>5,000</td>
<td>This allocation includes all roles associated with both customer and partner communities. If you need more roles, contact Salesforce Customer Support.</td>
</tr>
<tr>
<td>Maximum person account community users that a Salesforce user can own</td>
<td>10,000</td>
<td>Contact Salesforce Customer Support to increase this allocation.</td>
</tr>
</tbody>
</table>

**Important:** After you enable account role optimization, you can’t disable it.

1. Contact Salesforce Customer Support to enable account role optimization. After this feature is enabled, edit your Sharing Settings.
2. From Setup, enter Sharing Settings in the Quick Find box and select Sharing Settings.
3. In the Other Settings section, enable Optimize Account Roles.

Review how account role optimization responds to account changes.

<table>
<thead>
<tr>
<th>Change to Account</th>
<th>Account Role Optimization Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account merges</td>
<td>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).</td>
</tr>
<tr>
<td>Change in account ownership</td>
<td>The single community user assigned to the original account owner is reassigned to the new owner’s shared person role.</td>
</tr>
<tr>
<td>Community user license upgraded to a role-based community user license</td>
<td>If the account owner doesn’t already have another role-based community user, a shared person role is assigned to the community user.</td>
</tr>
</tbody>
</table>
Change to Account | Account Role Optimization Response
---|---
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.

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using Apex Sharing Code and Apex Triggers</td>
<td>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.</td>
</tr>
<tr>
<td>Using Record Access on a Role</td>
<td>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:</td>
</tr>
</tbody>
</table>

50
<table>
<thead>
<tr>
<th>Consideration</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an Apex trigger or workflow to allow the</td>
<td>Create an Apex trigger or workflow to allow the community user to retain access</td>
</tr>
<tr>
<td>community user to retain access to records even</td>
<td>to records even if a second community user is added.</td>
</tr>
<tr>
<td>if a second community user is added.</td>
<td></td>
</tr>
</tbody>
</table>

**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:**

- 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.

### Channel Programs and Levels

Channel Programs and Levels organize channel partners and provide access to resources and features based on the partner’s program level. Within each program, you can group partners into levels, such as bronze, silver, and gold, and promote them based on performance. Each program is associated with a sharing group, making it easy to manage membership and promotions.

With Programs and Levels, you can easily:

- Organize partner users by type or geography
- Manage access to resources based on rank
- Manage partner membership
- Track individual performances
- Promote or demote based on performance
Create a Channel Program

Channel programs organize partners who are running multiple channel programs. Create different programs for each type partner user, resellers, VARs, distributors, and MSPs. You can also organize partner users based on geography.

If you have a Partner License and have enabled Communities, the Channel Program is available in your org.

Create a program to provide partner users access to leads within their region, local marketing events, and shared resources. If more partner users join the team, you can add them to the channel partner program at any point.

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 the name, category, and a description.
4. Activate the Program.
5. Save the channel program.

Create Channel Program Levels

Motivate partner users to meet KPIs with program levels. Create multiple levels within a program and assign each partner user to a level based on 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.

If you have a Partner License and have enabled Communities, the Channel Program Level is available in your org.
Create channel program levels to organize members of a program into groups based on their performance.

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.

**Share with Program and Level Groups**

Group membership in programs and levels is maintained using sharing groups. A new partner user can be added to the group when joining a team. They can also be moved to another group, when they are being promoted or demoted to a different level.

Sharing groups aren’t only handy for moving users from one team to the next. You can also use 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 channel program member, but the account is no longer a partner account.

**Lead Distribution and Deal Registration**

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.

**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.

### 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.

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.
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

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.

SEE ALSO:
Create Page Layouts for Lead Distribution
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.

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.

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.

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.

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.

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.

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.

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.

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.

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 want 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.

- **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.

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.

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.

- **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.

- **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.

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.

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.

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.

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
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.

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.
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.

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.

- **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.

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.
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.

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.

Tip: You can create an approval workflow for partners to submit fund requests to the channel account manager.

Note: We’ve created the Total Approved Fund Requests field for you. This is a formula field and is automatically updated.

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.

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.

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 want 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.
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.

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.

Tip: You can create an approval workflow for partners to submit fund claims for reimbursement by the channel account manager or financial department.

Note: We’ve created the Total Approved Fund Claims and Total Reimbursed Fund Claims fields for you. These are formula fields and are automatically updated.
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.

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.
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 want 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 fund 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.

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.
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.

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, and you can even add scorecards as a tab.

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 them to be grouped by different KPIs.
4. Associate your scorecard with a program, level, or partner account.

Example: Partner Scorecard for Sales

Note: Metrics are pulled from summary reports. Filter report data by the account to ensure that the correct information is pulled into the scorecard. You must have access to the reports you want to associate with scorecards. Scorecard associations are permanently deleted when an account is disabled.

SEE ALSO:
Build a Report
Set Up Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully drive demand for products or services. Channel marketers can create and share marketing campaigns, guidelines, and assets with 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.

Example: Campaign Marketplace
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.
Set Up Salesforce Knowledge

Before you can set up all the great features of Salesforce Knowledge, make sure that you’re a Salesforce Knowledge user.

Salesforce Knowledge helps you get the right information to your customers and agents via articles that can be quickly reached from within your community. Whether through video, FAQs, or other formats, knowledge articles provide accurate information to customers when and where they need it.

1. From your personal settings, enter Advanced User Details in the Quick Find box, then select Advanced User Details. No results? Enter Personal Information in the Quick Find box, then select Personal Information.
2. Click Edit.
4. Click Save.

Create an Article Type

The first step when setting up Salesforce Knowledge is to create one or more article types. In fact, you can’t enable Salesforce Knowledge until you’ve created at least one article type.

An article’s type determines the type of content it contains, its appearance, and who has access to it. When your support agents create an article to provide a solution to an issue, they must choose the type of article that they’re creating.

1. From Setup, enter Knowledge Article Types in the Quick Find box, then select Knowledge Article Types.
2. Click New Article Type.
3. Type a name for the label of the article type.
4. Type the plural name of the object. If you create a tab for this object, this name is used for the tab.
5. Select Starts with a vowel sound, if the article type you’re creating starts with a vowel.
6. Type the API name for the article type.
7. Add a meaningful description to help you remember the differences between your article types when you’re viewing them in a list.
8. Select the Deployment Status of Deployed to make sure that this article type is available to use right away.
9. Click Save.

Enable Salesforce Knowledge in Your Community

We’ve set up articles that members and agents can use to solve issues and close cases. Now, enable and configure Salesforce Knowledge so that service agents can easily create knowledge articles.

1. From Setup, enter Knowledge Settings in the Quick Find box, then select Knowledge Settings. Confirm that you understand the impact of enabling Salesforce Knowledge and click Enable Salesforce Knowledge and click OK in the dialog box.
2. To select your general settings, click Edit.
a. To enable agents and internal users to edit articles without going to the Article Management tab, select **Allow users to create and edit articles from the Articles tab.**

b. To add a Validation Status field to all articles, select **Activate Validation Status field.** This way, agents can attach approved articles to questions instead of ones that haven’t gone through an approval process.

c. To allow `<iframe>` elements in the standard editor to embed multimedia content from Dailymotion, Vimeo, and YouTube, select **Allow users to add external multimedia content to HTML in the standard editor.**

3. To show article summaries to customers and internal community members in the article list view, select **Internal App** and **Customer.**

4. Choose **English** as the **Default Knowledge Base Language.** Your authors write most of the articles in this language. We recommend that your default knowledge base language and your organization's language are the same.

   **Note:**
   - Current multi-language users can still use Communities. The Salesforce Help provides more details on multi-language organizations.
   - To let guest users select a language when they visit your community, add the **Language Picker** component to any community page.

5. Select **Single Language.**

6. To let agents create a draft article that is attached to the case, select **Allow users to create an article from a case.**

7. Select the option that lets agents use the standard editor when they create articles. It also lets them add links, formatting, and videos to articles.

8. Select a default article type.

9. Optionally, select the options to use profiles to create PDFs on cases and for agents to share articles with public URLs.

10. Select the option to **Allow agents to create an article from a reply.**
    This option lets agents turn a helpful answer into an article.
    a. Select the default article type.
    b. Assign the article to an internal user, so that it can be evaluated for accuracy.

11. Click **Save.**

12. Optionally, 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 the Page Editor in Community Builder, navigate to the Article Detail page.
    b. Display component properties by clicking the Article View (Koa and Kokua) or Article Content (Customer Service (Napili) template) component.
    c. In the property editor, select **Enable Article Voting** and customize the vote prompt and confirmation text if desired.
    d. Publish your changes.

For more information on setting up Salesforce Knowledge, see the *Salesforce Knowledge Implementation Guide* or search the Salesforce Help.
Enable Formatting, Images, Links, and Videos in Articles

To let authors use formatting and add images, videos, or links to articles, you’ll need to add the rich text editor to the article type.

Since the only standard fields provided by default on article types are Article Number, Summary, Title, and URL Name, you’ll probably want to add a field where authors can create the body of the article. When you add the rich text editor to an article type, authors can enter text with formatting as well as add images, videos, and links.

**Note:** To preserve the responsive design capability of the templates, it’s a best practice to avoid manually editing the HTML widths of knowledge articles.

1. From Setup, enter Knowledge Article Types in the Quick Find box, then select Knowledge Article Types.
2. Click the name of the article type.
3. Click New in the Fields related list.
4. Select Text Area (Rich), and click Next.
5. Type Article Body as a field label.
6. We’ll accept the default values for the Length, Visible Lines, and Field Name.
7. Enter any field attributes, such as Description, and click Next to continue.
8. Set the field-level security to determine whether the field should be visible and editable or read-only for specific profiles. For example, you may want the field to be visible to everyone, but have the article body be read-only for external community members. That way, external community members can’t make changes to articles. In this scenario, you would set the field-level security as follows:
   a. Select Visible for all of the profiles listed who will be using the community and viewing articles.
   b. Select Read-Only for the profiles of external users and for any other profile that you don’t want editing the body of knowledge articles.
9. Click Next and select the checkbox to add the custom field to the layout.
10. Click Save.

**Example:**

![Image of the new custom field and article layout]
Create Data Categories to Organize Articles and Discussions

Create data categories to organize articles so that customers can browse articles and find the answers they’re looking for. There’s nothing worse than looking for a needle in a haystack. Your customers might come to the community with a question that’s already been answered, but if they can’t find the article or discussion, they’ll leave frustrated. Data categories help to organize articles and discussions so that members can browse the community in an organized way.

Note: For optimal performance, we suggest that you use no more than 20 data categories in each community.

1. From Setup, enter Data Category Setup in the Quick Find box, then select Data Category Setup.
2. Click Create New to create the data category group.
3. Specify the Group Name and enter a description. This name appears as the title of the category drop-down menu for articles and discussions in your community.
4. Click Save.
5. Click the category group and hover over All so that you can click Actions.
6. Click Add Child Category, type a category name, and click Add.
   Repeat this step to add the rest of your categories.
7. To activate a category group so it’s available to users, move the mouse over the category group name in the Inactive Category Groups and click 

8. Hover over the category name, click Actions, then select Add Child Category and type the new category name in the text box. Click Add.
Repeat this step to add all additional categories.

9. **Click Save.**

Once you've set up data categories, make sure to set the default visibility for the group. For instructions on setting up data category visibility, see the Salesforce Help.

**Note:** Users must have visibility to the category that is specified as the top-level data category in the properties setting for the component. So if a user has visibility to child data categories but not to the child's top-level data category, the article or discussion isn't visible.

**Example:**

**Data Categories**

Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of continents, countries, regions, and states. Use this page to manage category groups and the categories they contain.

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**Indexing Knowledge Articles**

You can modify the `robots.txt` file or submit the `sitemap.xml` file from your community so that search engines can properly index knowledge articles for your self-service community.
Having direct links to all the knowledge articles on your website is not always feasible, because there might be too many links to display. So, most communities use a search box so that users can find articles. When there aren’t direct links to articles, it’s impossible for search engines to index them. To help solve this problem, Salesforce creates a file called sitemap.xml that includes the links for the knowledge articles. It’s located at the root of the app for your community, for example, /community/s/. The robots.txt file also controls web search engine behaviors. It’s located at the root of the domain and is configured through the corresponding Lightning Platform community. You can either modify the robots.txt file to include a path to your sitemap.xml file and include the robots.txt file as part of your community, or you can submit the sitemap.xml file directly to the search engine.

**Example:** Here’s an example of a robots.txt file. It doesn’t allow any indexing at the / level, allows indexing at the /community/s/ level, and includes the path to the sitemap.xml file.

```
User-agent: *
Disallow: /
Allow: /community/s/
Sitemap: http://www.Your_Site.com/community/s/sitemap.xml
```

**Note:** The Allow directive is not supported by all search engines, although it’s supported by Google. You can remove Allow and Disallow to support all browsers.

```
User-agent: *
Sitemap: http://www.Your_Site.com/community/s/sitemap.xml
```

For more information on indexing, see these websites:

- Introduction to Force.com Sites
- Creating a Sitemap File
- http://www.sitemaps.org/
- http://www.robotstxt.org/

### Let Guest Users Create Cases

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.

**Note:** Guest users can’t attach files when creating a case.

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.
10. Enable Guest Access to the Support API.
11. Add New Case, 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.

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 (Napili) 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.

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.

Set Up Question-to-Case in Your Community

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 all communities where Chatter Questions is enabled.

Users with the “Moderate Chatter” user permission can create cases from questions directly in the feed. You can also set up processes—similar to workflow rules—in the Lightning 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.

When agents find a solution, they can respond to questions directly from the case, 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 set up Question-to-Case:

1. **Enable Question-to-Case in your communities.**
   a. From Setup, enter **Support Settings** in the Quick Find box, then select **Support Settings**.
   b. Select **Enable Question-to-Case in Communities**.
   c. Click **Save**.

2. **Add the Question from Chatter field to the Case Detail view.**
3. **Add the Escalate to Case action to the Feed Item layout.**
4. **Customize the Escalate to Case action layout.**
5. **Perform optional customizations:**
   a. Set up a queue for cases created from questions.
   b. Set up processes to automatically create cases from unresolved questions that meet specified criteria.

For details on steps 2 through 5, search for “Set Up Question-to-Case” in the Salesforce Help.
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.

**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 Koa, Kokua, or Customer Service (Napili) template, confirm that your active case detail page supports the community case feed:
   a. In Community Builder, click Page Management.
   b. Click Page Management.
   c. Find Case Detail in the Name column, and make sure that the active page assigned to it is either Chatter Case Detail (the default) or Record Detail.

   ![Case Detail](image)

   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 only see 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. If email notifications for case posts are enabled:

- When someone makes an externally visible post on a case, all case contacts 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 (Napili) 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...”.

Track Field Service Data in Your Community

Keep customers and field service technicians in the loop about field service work in communities. The following field service objects can be used in communities: Service Appointment, Product, Work Order, and Work Order Line Item objects. These, in addition to previously available objects like Asset, Account, and Contact, allow customers to easily schedule appointments, while technicians can check on work orders straight from their community.

1. To set up field service objects in your community, create a new object page in Page Manager in Community Builder.
2. When prompted to choose a Salesforce object, choose a field service object (Service Appointment, Product, Work Order, and Work Order Line Item). Page Manager automatically creates three related pages for the new object page: a record detail page, a record list page, and a related list page.
3. To expose the field in your Customer Service (Napili) community, add it to the Navigation Menu in the Page Editor.

Enable and Assign Permissions to Use Code Snippets in Your Community

Use code snippets to enter syntax-highlighted code samples through the publisher in Lightning Experience and self-service communities based on the Customer Service (Napili) template. To make code snippets available, enable them and assign the permission to use them. There are two ways to enable and assign code snippet permission: through a user profile (step 1) or through a permission set (step 2).

1. Enable code snippets through a user profile:
   a. In Setup, expand Manage Users (Users in Lightning Experience), click Profiles, then click Clone next to Standard User.
   b. Give the clone a Profile Name, and click Save.
   c. On the clone page, click Edit.
   d. Scroll to the General User Permissions section, select Allow Inclusion of Code Snippets from UI, and click Save.
   e. Under Manage Users, click Users.
   f. Edit each user you want to have code snippet permission, and assign them the cloned user profile.

2. Enable code snippets through a permission set:
   a. In Setup, expand Manage Users (Users in Lightning Experience), click Permission Sets, then click New.
   b. In the Label field, enter a name for the permission set.
   c. Optionally, pick a type of user license for this permission set; pick None if you don’t want to limit this permission set to a particular type.
   d. Click Save.
e. On the new permission set page, under System, click System Permissions, then click Edit.
f. Select Allow Inclusion of Code Snippets from UI, and click Save.
g. Click Manage Assignments, then Add Assignments.
h. Assign the new permission set, then click Done.

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.
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.

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.

Navigate Community Builder
Community Builder lets you quickly create and style your custom community to match your organization’s branding.

Theme Your Community with Community Builder
Use Community Builder’s Theme panel to efficiently apply color, fonts, and style to your community to match your design or brand. Match your colors precisely by uploading your own logo to automatically generate a custom color scheme. Create Branding Sets to quickly change color and style for different audiences and needs.
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 (Napili) template, easily access your navigational and featured topic settings.

Preview Your Community with Community Builder
Preview how your community appears in a desktop browser window and on mobile devices.

Publish Your Customizations with Community Builder
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
- Implementation Guide: Using Templates to Build Communities

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.
• 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
Implementation Guide: Using Templates to Build Communities

Theme Your Community with Community Builder

Use Community Builder’s Theme panel to efficiently apply color, fonts, and style to your community to match your design or brand. Match your colors precisely by uploading your own logo to automatically generate a custom color scheme. Create Branding Sets to quickly change color and style for different audiences and needs.

Each template includes predefined styles to control the appearance of the pages. These styles give you a head start with your community, and you can easily customize the styles further to suit your needs. After you’ve created a community, brand and style your pages with Community Builder’s Theme panel.

Depending on the template that you select, you can use Community Builder to:
• Choose colors for text, actions, links, navigation, and borders.
• Upload your own company logo image to generate a custom color scheme based on its main colors.
• Specify font family, style, weight, and case, and add a custom font.
• Change header and page background color.
• Use a Branding Set to quickly target different audiences and needs.
• Choose a custom Search component.
• Choose a custom User Profile component.

Theme Your Community with Community Builder

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
Use custom CSS to apply your own styles.

**Note:** Branding sets only apply to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Page Variations and Audience Targeting for Pages and Groups.

Community Builder can generate a color scheme for you. In the Colors panel, click **Generate Pallete from Image** and then choose your previously uploaded company logo or a different image, like an image of your company pallette. Community Builder extracts the main colors from the image you select and generates a scheme. To modify a color, click the color swatch and adjust the color by using the slider or by entering hex values.

To brand your community:

1. Select the page that you want to brand in the Pages menu on the top toolbar.
2. Define branding.
   Your changes are saved automatically and appear instantly on the page canvas.

   Alternatively, click **Edit CSS** on the Theme panel to use your own CSS styles. We recommend using CSS sparingly and only when necessary, because future releases of template components might not support all CSS customizations.

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.

SEE ALSO:
- Community Builder Overview
- Preview Your Community with Community Builder
- Find and Create Asset Files in Community Builder
- Implementation Guide: Using Templates to Build Communities
- Find and Create Asset Files in Community Builder

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.

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 (Napili) 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 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 “Configure the Guest User Profile for Unauthenticated Users” in the Using Templates to Build Communities Guide.

Set Featured and Navigational Topics (Customer Service (Napili) 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 Picker 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, 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 (Beta)
Use a header and footer from a connected CMS source in 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 Bolt solutions and pages.
Update Your Community’s Template

We introduce amazing features and enhancements with every release, so keep your community up to date! Typically, we automatically update your template to the latest version, so you can start adding the latest features to your community right away. However, when the changes are significant, you’re required to manually update your template.

Note: All future improvements to the Lightning templates will be made on the Spring ’18 version, so don’t get left behind.

As of Spring ’17, we no longer support Koa, Kokua, and Customer Service (Napili) template versions from before Winter ’16 (October 2015).

The impact of updating a template depends on the version your community is using. Not sure which version your community is using? Check each of your communities’ Settings page in Community Builder.

When a template update is available, a red notification icon appears over the Settings icon in Community Builder.

The impact of updating a template depends on the version that your community is using.

Important: We strongly recommend that you test the impact of the update in a sandbox environment. Once you update and publish your community, you can’t revert to an older version.

<table>
<thead>
<tr>
<th>Template Type and Version</th>
<th>What to Expect When Updating to Spring ’18</th>
</tr>
</thead>
</table>
| 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 Branding panel in Community Builder. To update existing CSS overrides see CSS mappings for updated components.  
• 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 objects... |
<table>
<thead>
<tr>
<th>Template Type and Version</th>
<th>What to Expect When Updating to Spring '18</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>layout, keep them, and refer to <a href="#">CSS Overrides Migration for the Record Layout Component</a> to add your styles and customizations to the new component</td>
</tr>
<tr>
<td></td>
<td>• A new Theme panel that redesigns the Branding Panel in Community Builder</td>
</tr>
<tr>
<td></td>
<td>• Additions to Theme settings that help you easily see which pages a theme layout is associated with</td>
</tr>
<tr>
<td></td>
<td>• More metadata options to improve discoverability of pages through SEO</td>
</tr>
<tr>
<td></td>
<td>• Query parameters in a community URL, other than language, no longer persist while navigating within a community</td>
</tr>
<tr>
<td></td>
<td>• Updates to CMS Connect (JSON) require manual updating to connections created with the Winter '18 release.</td>
</tr>
<tr>
<td></td>
<td>– CMS Connect (JSON) now autocreates detail pages. URL’s using query parameters pointing to your manually created pages will continue to work. However, they will not be accessible from the CMS Connect (JSON) Property Editor in Community Builder.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> For better SEO and management, it is best to use the new, automatically created pages.</td>
</tr>
<tr>
<td></td>
<td>1. In Community Workspaces, add a Content Type and the JSON path for both ID and Title.</td>
</tr>
<tr>
<td></td>
<td>2. In Community Builder, open the Property Editor of the existing CMS Connect (JSON) component by selecting it.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Save</strong> to create and autoconfigure the new detail page.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td></td>
<td>– CMS Connect (JSON) has new, configuration fields.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can have only one Content Item per Type and it is necessary to define a Content Item for navigation support.</td>
</tr>
<tr>
<td></td>
<td>– 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.</td>
</tr>
<tr>
<td></td>
<td>– 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.</td>
</tr>
</tbody>
</table>
## Template Type and Version | What to Expect When Updating to Spring ’18
---|---
**Spring ’17 and Summer ’17 Customer Service (Napili), 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.  
• 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 Branding panel in Community Builder. To update existing CSS overrides see [CSS mappings for updated components](#).  

**Test your CSS customizations in a sandbox environment to ensure they are working as they should.**  
• 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 updates from Spring ’17 to Spring ’18, as listed above.

**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 updates from Spring ’17 to Spring ’18, as listed above.

**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 to updates from Spring ’17 to Spring ’18, as listed above.

**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?” in the [Using Templates to Build Communities](#) guide.
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.

After you update your template, the Branding panel has been renamed: Theme panel. If you are upgrading from a pre-Winter ’18 template, some of the old branding properties you know are reorganized but still there, others will now map to different properties. With the new design, you can work in a more focused way with just Colors, Images, Fonts, or specific Theme Settings. Let’s take a closer look at the changes.

<table>
<thead>
<tr>
<th>Pre-Winter ‘18 branding properties ...</th>
<th>Map to these updated branding properties ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background Color (1)</td>
<td>Background Color (1)</td>
</tr>
<tr>
<td>Button Color (2)</td>
<td>Action Color (2)</td>
</tr>
<tr>
<td>Button Border Color</td>
<td></td>
</tr>
</tbody>
</table>

![Old Branding Panel vs. New Theme Panel](image-url)
Pre-Winter ’18 branding properties ... | Map to these updated branding properties ...
--- | ---
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)
Card Transparency | Also controls card transparency
Card Border Color | —
Card Transparency | —
Font Family (7) | Primary Font (7)

SEE ALSO:
- Community Builder Settings
- Community Builder Overview

Considerations for Changing Your Community Template

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

**Note:** Starting with Winter ’17, the ability to change templates is no longer supported for Lightning communities. So, for example, we don’t recommend changing your Customer Service (Napili) community to a Partner Central community. The functionality is still available for these templates, but we recommend that you start afresh with a new community instead. If you do change from one Lightning community template another template type, Salesforce Customer Support will be unable to assist you if any problems arise.

- 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](#).
- 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 **AdministrationPreferences > 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 (Napili) 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: 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.

To learn more about using communities templates, see the Using Templates to Build Communities.

To learn more about using the Aloha template, see the Getting Started with the Aloha Community Template for Salesforce Identity.

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.
Preview Your 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, you can see the community in its own browser tab as a customer would see it by clicking the pop-out button.

- To preview the community on different devices, use the options in the **View Mode** menu:
  - For phones, click **Mobile**.
  - For tablets, click **Tablet**.
  - For desktop computer screens, click **Desktop**.

SEE ALSO:
- Community Builder Overview
- Publish Your Customizations with Community Builder
- Implementation Guide: Using Templates to Build Communities
Publish Your Customizations with Community Builder

Publish your community in Community Builder to make your branding and component customization updates available to everyone in your community.

**Important:** Publishing a Lightning community for the first time activates the community URL and enables login access for community members. The community doesn’t have to be active.

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. An email notification informs you when your changes go live.

**SEE ALSO:**
- Community Builder Overview
- Preview Your Community with Community Builder
- Implementation Guide: Using Templates to Build Communities

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 ![link](image) (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 132 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.
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
You can add new components to your community’s pages or edit the properties of existing components to customize each page to suit your needs.

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.

Control Public Access for Each Page in Your Community
Set page-specific access to your community pages, so you can restrict or open up access as you see fit.

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.

Page Variations and Audience Targeting for Pages and Groups
Criteria-based page visibility lets you create different versions of your page and make those variations available to specific audiences and groups.
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.

Change the Content Layout in Community Builder
Quickly change the look of your community’s pages by switching to a different layout. You can even create your own custom layouts in the Developer Console and import them to use in your 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.
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>
<thead>
<tr>
<th>Expression</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>{!Record._Object}</code></td>
<td>Returns the display name of the object. Output appears in the appropriate language, if available.</td>
</tr>
<tr>
<td><code>{!Record._Title}</code></td>
<td>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.</td>
</tr>
<tr>
<td><code>{!Record.FieldName}</code></td>
<td>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.</td>
</tr>
</tbody>
</table>

**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 Components Developer Guide: Create Custom Content Layout Components for Communities

Edit Community Pages and Components in Community Builder

You can add new components to your community’s pages or edit the properties of existing components to customize each page to suit your needs.

If you’re adding components to a new custom page, spend some time planning the composition of the page based on its purpose.

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 Components Developer’s Guide.

Error Messages for Pages Without Data in Community Builder

When you build a template-based community page using Lightning components in Community Builder, you sometimes run into a situation in which a page isn’t loading 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, you sometimes run into a situation in which a page isn’t loading 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.
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 (Napili) 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 (Napili) 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.

The following default pages in the Koa template can show this error. Here are some tips on how to fix it.

- Home: Associate a Data Category with the template.
- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Article List: Create at least one Salesforce Knowledge article in your org.
- Category Home: Create at least one Data Category in your org.
- Search: Create at least one Salesforce Knowledge Data Category and article in your org.

The following default pages in the Kokua template can show this error. Here are some tips on how to fix it.

- Home: Associate a Data Category with the template.
- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Article List: Create at least one Salesforce Knowledge article in your org.
- Case Detail: Create at least one case in the community or your org.
- Category Home: Create at least one Data Category in your org.
- Feed Detail: Use the Post Publisher to create a post or question.
- My Cases: Create at least one case in the community or your org.
- Search: Create at least one Salesforce Knowledge Data Category and article in your org.

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.

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 (Napili) 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 (Napili) 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. For more information about templates and components, see Using Templates to Build Communities.

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 on the page variation row and select Delete. Confirm your delete request in the Delete this page variation? dialog to complete the task.

Control Public Access for Each Page in Your Community

Set page-specific access to your community pages, so you can restrict or open up access as you see fit.

If you want folks to access your community without logging in, enable Public can access the community under General Settings in Community Builder.

Alternatively, you can set page-level access in Page Properties.

**Community Default Setting**

Reflects your choice for Public Access under General Settings. If you allow public access, your community pages are accessible to the public, including unlicensed users by default. If not, members must log in to access the community.

**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, we first check the community’s default setting. Is it public or does it require users to log in? After that first check, we look at the page access. Once that’s cleared, we finally check the audience criteria-based visibility 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 at the component level 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 the Publicly available check box in the component’s properties.

**Important:**

- There are some exceptions to the rule. Some pages are always public, while 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 any page has public access enabled.
- When you add custom components to your community, they can bypass the object- and field-level security (FLS) you set for the guest user profile. Lightning components don’t automatically enforce CRUD and FLS when referencing objects or retrieving the objects from an Apex controller. This means that the framework continues to display records and fields for which users don’t have CRUD permissions and FLS visibility. You must manually enforce CRUD and FLS in your Apex controllers.
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:** With the “Enable Stricter CSP for Lightning Components in Communities” critical update, you have control over whether to enforce stricter CSP. When stricter CSP is activated, 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.

<table>
<thead>
<tr>
<th>Allowed Tags</th>
<th>Allowed Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;base&gt;</code></td>
<td>href, target</td>
</tr>
</tbody>
</table>
| `<link>`     | as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel, 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, noopen, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag. |
| `<meta>`     | charset, content, http-equiv,  
  2 For http-equiv, allowed values are cleartype, content-type, content-language, and default-style.  
  2 Note: The attribute http-equiv="X-UA-Compatible" is only supported in combination with content="IE=Edge". |
| `<script>`   |                    |
| `<noscript>` | Within `<noscript>` only the following elements are supported: `<img>`, `<a><img>`, `<iframe>` |
| `<title>`    | None allowed       |

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.

```html
<link rel="icon"
type="image/png"
href="http://example.com/myicon.png"
```

---

**Page Variations and Audience Targeting for Pages and Groups**

Criteria-based page visibility lets you create different versions of your page and make those variations available to specific audiences and groups.

**Note:** This functionality is available in the Winter ’16 and later versions of the Customer Service (Napili) template.

### Page Variations

Page variations are alternative versions of a page. You can use them to try out different page layouts and styles, or create variations that are aimed at distinct audiences. Every page in your community, including custom pages, must have one default page variation. You can add as many extra variations as you need on the page’s Page Variations tab.

You can also duplicate page variations, which really speeds things up when you’re creating page variations that have only minor differences.

Assigning specific audience criteria to a page variation lets you target a particular set of members. Criteria include:
You can add multiple profiles to a variation if you like, or none.

Here are some considerations when setting location criteria:

- Location based on the user’s IP address, which could potentially be located in a neighboring city.
- The location permission is not on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Location criteria don’t work in countries that don’t allow the use of the Google API.

**Example**: Let’s say you have a financial services community and you want your clients and your brokers to see a different Home page based on their profile. You can create two variations of the Home page, each with content targeting a specific audience—clients and brokers in this case—and set the visibility of each page to different profiles. All members go to the same URL, but your clients see Home A, whereas your brokers see Home B.

---

**Who Exactly Sees What?**

After you create the page variations you need in Page Manager, you can set their visibility. 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.

**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.
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.

General considerations:

- If you have multiple page variations, the page with the most criteria is displayed to the targeted users. If you have pages with similar criteria, the rank of the criteria determines which page is displayed. Priority is determined in this order:
  - Profile
  - Record type
  - Location going from the most specific (like state) to the broadest (like country)

  For example, you have two pages with the profile criteria set to sales user. One also uses the record type criteria while the other uses location. The page set to sales user and record type displays because record type has a higher priority.

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.
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 (Napili) template.

To assign audience criteria to a page variation. See Page Variations and Audience Targeting for Pages and Groups for details and considerations when using audience criteria.

1. In Page Manager, select the page you want to edit.

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**

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. Marketing sees what they need, Sales sees something else, and so on.

**Example:** Let’s look at how that would work. First, create an audience, then click the dropdown next to **User.**

Selecting **Contact** opens another dropdown with more options.

Next, select **Department** and then enter the criteria. Give your audience a name, and you’re ready to start assigning.
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.
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 for the template pages (1) in your community. Theme layout components are organized and applied to your pages through theme layouts. Theme layout components include the common header and footer (2), and often include navigation, search, and the user profile menu. In contrast, the content layout (3) defines the content regions of your pages, such as a two-column layout.

A theme layout categorizes the pages in your community that share the same theme layout component. You can assign a theme layout component to any existing theme layout. Then you apply the theme layout — and thereby the theme layout component — in the page’s properties.

Customer Service (Napili) includes the following theme layouts and components, but you can create custom components or switch layouts as needed.

- Login applies the theme layout component, Login Body Layout to the login pages.
- Default is applied to all non-login related pages.

**Note:** A developer creates custom theme layout components in the Developer Console by implementing the `forceCommunity:themeLayout` interface.

**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, you apply the Spring theme layout in each page’s properties, which instantly applies the Large Header layout component to each page.

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 area, 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—which you’ve enabled and applied 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?

Know at a glance and a click how many and which pages are associated with any of your theme layouts. From **Settings > Theme**, click the total number of pages (1) shown for any theme layout row to open a list of the pages associated with that theme layout (2) before making changes.

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 Components Developer Guide: Create Custom Theme Layout Components for Communities*
- *Lightning Components Developer Guide: Create Custom Search and Profile Menu Components for Communities*
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 the same 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 area in Community Builder. When the component is available, assign it to a theme layout to instantly transform the pages the layout applies to.

1. In Community Builder, click on the left sidebar and then click **Theme**.

2. If necessary, create a theme layout.

3. Assign the theme layout component to the theme layout.
4. Update the theme layout’s settings, if available. The properties vary depending on how your developer has configured the theme layout component.

For example, the default Customer Service theme layout component includes the following options for configuring the header region.

**Hide the header region and navigation**

Hides the default community header, which includes the header image, search box, community menu, and user profile navigation menu, in all the pages of your community. Select this option if you want to replace the header with your own custom version.

**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.

Tip: A developer can create a custom search component using the `forceCommunity:searchInterface` or a custom user profile component using the `forceCommunity:profileMenuInterface` in the Developer Console.

5. In the page properties, select **Override the default theme layout for this page** (1) to apply the theme layout to a page by selecting the theme layout (2) from the available options.
Need to make changes or not sure which Theme Layouts are associated with which pages? The Pages Assigned column in theme settings is here to help. Click the total number of pages (1) shown for any theme layout row to open a list of the pages associated (2) with that theme layout.

SEE ALSO:

- Custom Theme Layouts and Theme Layout Components
- Page Properties and Types in Community Builder
- Lightning Components Developer Guide: Create Custom Theme Layout Components for Communities
- Lightning Components Developer Guide: Create Custom Search and Profile Menu Components for Communities
Change the Content Layout in Community Builder

Quickly change the look of your community’s pages by switching to a different layout. You can even create your own custom layouts in the Developer Console and import them to use in your community.

Note: This functionality is available in the Winter ‘16 and later versions of the Koa, Kokua, and Customer Service (Napili) templates and the Spring ‘16 and later versions of the Aloha template.

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 Properties, click Change in the Layout section.
If there is a Page Variation available, you can make it active in the Layout section (1). Apply a different layout to each variation separately by clicking Change (2).

3. Select the new layout. If you've added a custom layout, 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**.
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.

Let’s Get Started

For neatly centered text and video, use the Rich Content 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.

**Note:** To include a Visualforce page on a community page, use the Visualforce Page component in Community Builder.

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.

![Enable Visualforce Page Access]

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 Salesforce mobile apps and Lightning Pages and click Save.

![Visualforce Page Component]

Visualforce Page Component—To add a Visualforce page to your Customer Service (Napili) 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.

Canvas App Settings

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 (Napili) 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:
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 (Napili) 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 (Napili) 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.

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 (Napili) 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 (Napili) template.

1. In Community Builder, drag and drop 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 (Napili) template supports accounts, cases, contacts, and custom objects.
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 (Napili) 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 (Napili) template.
- The Record List page and the Record Home List View component are not available in the Koa and Kokua templates.

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 (Napili) template.

The Customer Service (Napili) 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.

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.

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.

The Record Detail page, the Record Headline component, and Record Information component are not available in the Koa and Kokua templates.

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 (Napili) 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 (Napili) 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.

Group announcements aren’t supported in communities.

**Group list in the Customer Service (Napili) Template**

![Group list in the Customer Service (Napili) Template]

**Group detail page in Customer Service (Napili) Template**

![Group detail page in Customer Service (Napili) Template]
External Data Sources in Your Community

Access your external data and content that are stored outside your Salesforce org from your Customer Service (Napili) template 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
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 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.
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.

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.

2. 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.

3. 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**. The first dimension you create in your Google Analytics account is automatically sorted as Index 1.
   a. For Index 1, enter the Name: **User Type** and select **Hit** for the scope.
   b. For Index 2, enter the Name **Salesforce Object** and select **Hit** for the scope.

4. 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**.

5. To track how different types of users are interacting with the community, click **Reporting > Audience > User Explorer > User Flow**

6. 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 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.

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.
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 Picker** 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 Picker

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.

   **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

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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active on Live Community</td>
<td>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.</td>
</tr>
<tr>
<td>Fallback Language</td>
<td>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.</td>
</tr>
<tr>
<td>Display Label</td>
<td>You can define the display label for each language. The display label appears in any language picker components you add to your community.</td>
</tr>
</tbody>
</table>
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.
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.

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
<component context="Rich Content Editor (Aura)" id="89445f2d-70d2-4cfc-a496-bb67db1b2c94"> <field name="AuraAttributes" language="en_US" exportversion="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-bb67db1b2c94"> <field name="AuraAttributes" language="fr_FR" exportversion="1287625607"> <property name="richTextValue"> <![CDATA[<p>Ceci est notre contenu français.</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

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

**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.

**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.

**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 **Advanced** on the left sidebar and click **Advanced**.

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**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
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.

Cost

The Cost tab displays the amount of time each component was busy processing its logic. The lower the time, the better the performance.
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.

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.

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 2–6 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 2–6 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.”

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.

```markdown
<table>
<thead>
<tr>
<th>Caching</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
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COMPONENTS FOR BUILDING YOUR COMMUNITY

Pages are the building blocks of your community. They control what your users see and how they interact with the community. 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 of the preconfigured community templates are ready for you to use with little configuration. Also, you can create pages or drag and drop other components on to existing pages as needed. And if you create custom Lightning components, they also appear in the list of available page components in Community Builder.

When you edit a page, you can set properties for how information appears, move components around, or delete components you don’t require.

For example, the Home page in the Customer Service (Napili) template contains components that quickly give community members an overview of the community content. These include components that let customers explore articles, read discussions, search for information, ask questions, and contact support. If you’re creating a community to deflect cases and don’t want to let customers file cases, you can remove the component for contacting support.

Customer Service (Napili) Template’s Pages
The Customer Service (Napili) template lets your customers post questions to the community and search for and view articles. If they don’t find what they’re looking for, they can contact a support agent.

Partner Central Template’s Pages
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.

Customer Account Portal Template’s Pages
The Customer Account Portal template improves customer relationships and decreases service costs by making it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

Build Your Own Template’s Pages
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.

Kokua Template’s Pages
A picture is worth a thousand words, and we built the Kokua template to give your users a visually rich self-service community. This template lets users browse and search your articles based on data categories. The template also lets them access cases and browse data categories in the left navigation component.

Koa Template’s Pages
The Koa template is optimized for mobile users by relying on text to let your users search for articles. Your customers can browse and search your articles based on data categories, and can view trending articles for each of the categories in the community. The template has a drop-down menu in the header that lets users view their profile, contact support, and log out of the community.

Login Template Pages
The Login template provides a customized user login experience that can include your company’s branding. This template gives users advanced login options to change their password, complete a self-registration form as a new user, or log in with a third-party account. Users who use single sign-on to log in to your community do not see this login page.
Which Components Can I Use with Each Template?

Lightning community templates, such as Customer Service (Napili), Partner Central, and Aloha, 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.

Customer Service (Napili) Template’s Pages

The Customer Service (Napili) template lets your customers post questions to the community and search for and view articles. If they don’t find what they’re looking for, they can contact a support agent.

This template takes it to the next level by adding 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. And like the other self-service community templates, your customers can use any device with a consistent user experience every time.

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. The person who asked the question or the question’s moderator can select a best answer. The best answer is prominently displayed in the feed, allowing other users to quickly and easily find the best response to their question.

The Customer Service (Napili) template has an enhanced profile and navigation experience for logged-in users, as well. 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.

The Customer Service (Napili) 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. You can 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 the community, you or the community manager associate topics with existing data categories, so your articles appear in the appropriate topics in the community.

Note: While the Customer Service (Napili) 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, search for “Modifying Default Data Category Visibility” in the Salesforce help.

The User Settings menu lets users manage their personal settings directly in the Customer Service (Napili) template. The My Settings menu is available in the profile header for authenticated users. The language, locale, and time zone settings let users localize the community so that they see everything in their own language. The profile visibility setting lets users determine whether guest users who aren’t logged in to the community can see their profile details. The email notification settings let users control when they receive email based on activity in the community.

This section highlights each page of the Customer Service (Napili) template and includes a summary of the components that are contained in each page.
Shared Page Components

All pages in the Customer Service (Napili) template include the template header, which consists of the following components:

- **Search Publisher** (1) lets your users search for articles and discussions, ask questions, and contact support when they can’t find the information they’re looking for.
- **Profile Header** (2) displays a user’s name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- **Navigation Bar** (3) lets users select different topics to browse and provides navigation back to the community home page. In Winter ’16 and later releases, the **Navigation Menu** has replaced the Navigation Bar.
This page contains the following components:

- **Headline (1)** lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- **Featured Topics & Feeds (2)** requires no setup, but lets you change the labels for the articles and discussions on the home page.
- **Ask a Question (3)** requires no setup, but lets you change the button’s label text.
Components for Building Your Community

- **Recommendations Carousel** (4) displays custom and system-generated topic recommendations for your community.
- **Reputation Leaderboard** (5) displays a list of up to 15 community members with the highest reputation points.
- **Topic Trending Articles** (6) requires no setup, but lets you change the type of topics that appear.
- **Trending Topics** (7) displays the popular topics in your community.
- **Contact Support & Ask Buttons** (8) requires no setup, but lets you change the buttons' label text.

**Article Detail**

This page contains the following components:
- **Headline** (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- **Article Content** (2) requires no setup.
- **Related Articles List** (3) lets you change the label for the component, configure how many related articles to display in the list, and choose whether to show view counts.
- **Topic Trending Articles** (4) requires no setup, but lets you change the type of topics that appear.
- **Contact Support and Ask Buttons** (5) requires no setup, but lets you change the buttons' label text.
Case Detail

This page contains the following components:

- **Case Banner** (1) requires no setup.
- **Set Case Status Button** (2) requires no setup, but lets you specify label text for the status button.
- **Case Detail** (3) requires no setup.
- **Case Attachments** (4) requires no setup.
- **Case Comments Publisher** (5) requires no setup, but lets you specify label text for the title and the button. You can also change the placeholder text for the publisher and choose not to allow users to attach files.
- **Case Comments** (6) requires no setup.

**Note:** Enabling the community case feed in your community replaces the Case Comments and Case Comments Publisher components with the Case Feed and Case Feed Publisher components, respectively.

- **Case Feed Publisher** lets customers create Chatter posts on cases, and must be added to the Case page as part of the community case feed setup process.
- **Case Feed** displays all case interactions in a chronological feed, including case posts, emails, and related questions. It must be added to the Case page as part of the community case feed setup process.
Contact Support

This page contains the Create Case Form (1). The Create Case Form requires no setup for authenticated users, but it lets you change label text and enable authenticated users to attach files to the case. This component searches text as it’s being entered into a case, and recommends articles based on the search text. To let guest users create cases, you need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.
Create Record

This page contains the Create Record Form, which displays the action layout when a user clicks an action from the Create Record button.

Error

Oops, something went wrong. Please refresh the page and try again.

This page displays an error message that you configure by changing the text in a Content Block component.
Feed Detail

This page contains the following components:

- **Feed Post & Comments** (1) displays the detailed view of an individual post, comment, or question in the community feed, and isn’t configurable.

Users reach the Feed Detail page by clicking a feed item’s time stamp.

Group Detail
This page contains the following components:

- The Group component displays all the content in the group, including the group banner, description, related lists, and the group feed.

**Messages**

Add the Messages page to your community navigation menu or include the My Messages link in the Profile Header component to provide easy access to direct messages for community members.
This page contains the following components:

- **Headline** (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- **Feed Post & Comments** (2) displays the detailed view of an individual post, comment, or question in the community feed, and isn’t configurable.
- **Related Questions List** (3) lets you change the label for the component, configure how many related questions to display in the list, and choose whether to show view counts.
- **Topic Trending Articles** (4) requires no setup, but lets you change the type of topics that appear.
- **Recommendations Carousel** (5) displays custom and system-generated recommendations for your community.
Contact Support and Ask Buttons (6) requires no setup, but lets you change the buttons’ label text.

Record Detail

This page contains the following components:

- **Record Headline (1)** lets you view the record name and the buttons to edit and delete the record. You can modify the fields that display on this component by customizing the Highlights Panel layout for the object.
- **Record Information (2)** shows detailed information about a record, a list of related records, and the record feed.

**Note:** External community members who access the My Account link see their account details based on the configuration of the Record Detail page.

Record List
This page contains the following component:

- **Record List** shows a list of records for an object. It also includes a button that allows community members with permissions to create records. Case List and Group List pages are also available out-of-the-box.

### Related Record List

![Related Record List Example](image)

This page contains the following component:

- **Related Record List** (1) displays a list of records related to an object and a button that lets community members create related records of the same type. This page and component are not customizable. Case Related List and Group Related List are also available out-of-the-box.
Search

This page contains the following components:

- **Headline** (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- **Search Results** (2) requires no setup, but lets you change label text and whether the articles or discussions tab appears first.
- **Contact Support and Ask Buttons** (3) requires no setup, but lets you change the buttons’ label text.
This page contains the following components:

- **Headline** (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- **Topic Catalog** (2) requires no setup, and pulls in the navigational topics and subtopics you’ve already set up.
This page contains the following components:

- **Headline** (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles. 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter <code>{!topicName}</code> to retrieve and display the topic name on the topic detail page.</td>
</tr>
<tr>
<td>Page Type</td>
<td>Enter <code>topic</code> as the page type.</td>
</tr>
<tr>
<td>Show Subtopics</td>
<td>Select this option to display subtopics.</td>
</tr>
</tbody>
</table>

- **Follow Button** (2) displays a Follow button on other users’ profiles.
- **Search Results** (3) lets you change label text and whether the articles or discussions tab appears first.
- **Topic Trending Articles** (4) lets you change the type of topics that appear.
• **Knowledgeable People** (5) lets you change the label for the component and choose topics from which knowledgeable people are identified.

• **Related Topics List** (6) lets you change the label for the component.

• **Contact Support and Ask Buttons** (7) requires no setup, but lets you change the buttons’ label text.

### User Profile

This page contains the following components:

• **User Profile Image** (1) displays a user’s reputation level, reputation points, and profile photo, and isn’t configurable.

• **Follow Button** (not shown) displays a Follow button on other users’ profiles.

• **User Profile Summary** (2) displays a user’s contact information and isn’t configurable.

• **User Profile Stats** (3) displays a user’s Chatter statistics in the community. It displays the number of posts and comments, number of likes received, number of people they follow, and number of people following them.

• **User Profile Tabs** (4) displays tabs showing a user’s Chatter Activity and Cases. When viewing another users’ profile, users see only the Activity tab.

• **User Profile Knowledgeable About** (5) displays topics a user has expertise about. This component is available in Winter ’16 and later.
In Spring ’16 and later, the User Profile page could alternatively use the User Profile component which includes the User Profile Image, Follow Button, User Profile Detail, User Profile Stats, User Profile Tabs, and User Profile Knowledgeable About components.

User Settings

This page contains User Settings, which requires no setup, but lets users choose their language, location, and time zone. Also, they can determine if guest users who aren’t logged in to the community can view their profile details. Lastly, users can choose which activities they want to receive email about.
Partner Central Template’s Pages

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

• Wizard-driven 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

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Company</th>
<th>Phone</th>
<th>Email</th>
<th>Lead Status</th>
<th>Owner Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah Loehr</td>
<td>Sys. Admin</td>
<td>MedLife, Inc.</td>
<td></td>
<td>contacted</td>
<td>Lead inbox</td>
<td></td>
</tr>
<tr>
<td>Alan Span</td>
<td>VP of Sales</td>
<td>Guildwire</td>
<td>test@salesforce</td>
<td>New</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stephanie Küttz</td>
<td>CTO</td>
<td>Appec</td>
<td></td>
<td>New</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peter Kars</td>
<td>CEO</td>
<td>Kraft Solutions</td>
<td></td>
<td>New</td>
<td></td>
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<tr>
<td>Luke Chada</td>
<td>CMO</td>
<td>Net Operations</td>
<td></td>
<td>New</td>
<td></td>
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<tr>
<td>Helen Barber</td>
<td>VP of Operations</td>
<td>Albins Inc</td>
<td></td>
<td>New</td>
<td></td>
<td></td>
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<tr>
<td>John Fritz</td>
<td>Founder</td>
<td>Land Consulting</td>
<td></td>
<td>New</td>
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</tbody>
</table>

Lead Inbox and Lead Detail

Add Resources
New
Name: Jim Harwood
Title: VP Sales
Company: Corning LP
Phone: 415-555-0555
Email: jharwood@corning.com

Address
555 Montgomery St, San Francisco, CA 94105
Website: www.corning.com

Additional Information
- No. of Employees: 5,000-9,999
- Annual Revenue: $800,000,000
- Industry: Technology

Resources Page—Share Files and Libraries with Partners
Customer Account Portal Template’s Pages

The Customer Account Portal template improves customer relationships and decreases service costs by making it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

Included Features

- Wizard-driven setup
- 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
Components for Building Your Community

- 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
- Stream object pages
- User Profile
- User List
- User Related List
- Generic record pages
- Login pages

Build Your Own Template’s Pages

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

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.

Kokua Template’s Pages

A picture is worth a thousand words, and we built the Kokua template to give your users a visually rich self-service community. This template lets users browse and search your articles based on data categories. The template also lets them access cases and browse data categories in the left navigation component.

This section highlights each page of the Kokua template and includes a summary of the components that are contained in each page.

Note: To use this template, you must enable and set up Salesforce Knowledge. Contact Salesforce if you need to add Knowledge licenses.

Shared Components

All pages in the Kokua template include the following components:

- **Toggle Button** requires no setup and lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn’t appear in the desktop view.
- **Back Button** requires no setup and displays a button that lets users navigate to the previous context.
- **Profile Header** (1) displays a user’s name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- **Search** (2) lets users search articles within the context of the page they’re viewing.
This page contains the following components:

- **Featured Search** (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Featured Data Categories** (2) requires no setup, and lets you specify the number of categories to display and change the title of the component.

- **Contact Support** (3) requires no setup, and lets you change the title of the component and the text for the button label.
This page contains the following components:

- **Article View** (1) requires no setup.
This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Article List (2)** requires no setup, but lets you specify how many articles appear in the list of returned articles.
Case Detail

This page contains the following components:

- **Case Banner** (1) requires no setup.
- **Set Case Status Button** (2) requires no setup, but lets you specify label text for the status button.
- **Case Detail** (3) requires no setup.
- **Case Attachments** (4) requires no setup.
- **Case Feed Publisher** (5) lets users create Chatter posts on cases, check case status, and upload attachments from any of their devices. If you’re using Basic Case Detail as your active case detail page, users see the **Case Comments Publisher** component instead.
- **Case Feed** (6) displays a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments. If you’re using Basic Case Detail as your active case detail page, users see the **Case Comments** component instead. Make sure to enable the community case feed to expose case interactions in the feed.
Category Home

This page contains the following components:

• **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

• **Trending Articles (2)** requires no setup, but lets you specify the number of categories and articles display. You can also change the title of the component.

• **Contact Support (3)** requires no setup, and lets you change the title of the component and the text for the button label.
Contact Support

This page contains the Create Case Form (1). The Create Case Form requires no setup for authenticated users, but it lets you change label text and enable authenticated users to attach files to the case. This component searches text as it’s being entered into a case, and recommends articles based on the search text. To let guest users create cases, you need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

Error

This page displays an error message that you configure by changing the text in a Content Block component.
Feed Detail

This page contains the following components:

- **Feed Post & Comments (1)** displays the detailed view of an individual post or comment in the case feed, and isn’t configurable.

Users reach the Feed Detail page by clicking the time stamp of an item in the case feed.
My Cases

This page contains the following components:

- **User Profile Summary & Image** (1) displays a user's profile photo and contact information, and isn’t configurable. Users see a Follow button on other users’ profiles.
- **Case List** (2) displays a user’s list of cases. Only case numbers are clickable.
This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Article List (2)** requires no setup, but lets you specify how many articles appear in the list of returned articles.
- **Category Filter (3)** requires no setup.
- **Article Type Filter (4)** requires no setup.
Koa Template’s Pages

The Koa template is optimized for mobile users by relying on text to let your users search for articles. Your customers can browse and search your articles based on data categories, and can view trending articles for each of the categories in the community. The template has a drop-down menu in the header that lets users view their profile, contact support, and log out of the community.

This section highlights each page of the Koa template and includes a summary of the components that are contained in each page.

Note: To use this template, you must first enable and set up Salesforce Knowledge. Contact Salesforce if you need to add Knowledge licenses.

Shared Components

All pages in the Koa template include the following components:

- **Profile Header** (1) displays a user’s name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- **Search** (2) lets users search articles within the context of the page they’re viewing.
This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Expanded Category Navigation (2)** requires no setup, but lets you specify the numbers of categories and subcategories that display on the page. You can also change the title text for the component.

- **Trending Articles (3)** requires no setup, but lets you specify the numbers of categories and articles that display on the page. You can also change the title text for the component.
• Contact Support (4) requires no setup, but lets you change the title of the component and text for the button label.

Article Detail

This page contains the following components:
• Article View (1) requires no setup.
This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Article List (2)** requires no setup, but lets you specify how many articles appear in the list of returned articles.
Case Detail

This page contains the following components:

- **Case Banner** (1) requires no setup.
- **Set Case Status Button** (2) requires no setup, but lets you specify label text for the status button.
- **Case Detail** (3) requires no setup.
- **Case Attachments** (4) requires no setup.
- **Case Feed Publisher** (5) lets users create Chatter posts on cases, check case status, and upload attachments from any of their devices. If you’re using Basic Case Detail as your active case detail page, users see the **Case Comments Publisher** component instead.
- **Case Feed** (6) displays a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments. If you’re using Basic Case Detail as your active case detail page, users see the **Case Comments** component instead. Make sure to enable the community case feed to expose case interactions in the feed.
Category Home

This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Expanded Category Navigation (2)** requires no setup, but lets you specify the numbers of categories and sub-categories that display on the page. You can also change the title text for the component.

- **Trending Articles (3)** requires no setup, but lets you specify the numbers of categories and articles that display on the page. You can also change the title text for the component.

- **Contact Support (4)** requires no setup, but lets you change the title of the component and text for the button label.
This page contains the Create Case Form (1). The Create Case Form requires no setup for authenticated users, but it lets you change label text and enable authenticated users to attach files to the case. This component searches text as it’s being entered into a case, and recommends articles based on the search text. To let guest users create cases, you need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

Error

This page displays an error message that you configure by changing the text in a Content Block component.
Feed Detail

This page contains the following components:

- Feed Post & Comments (1) displays the detailed view of an individual post or comment in the case feed, and isn't configurable.

Users reach the Feed Detail page by clicking the time stamp of an item in the case feed.
My Cases

This page contains the following components:

- **User Profile Summary & Image** (1) displays a user’s profile photo and contact information, and isn’t configurable. Users see a Follow button on other users’ profiles.
- **Case List** (2) displays a user’s list of cases. Only case numbers are clickable.
Search

This page contains the following components:

- **Featured Search (1)** requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.

  **Note:** Featured Search in the Home page uses the expression `{!Site.TopLevelCategory}` to search based on the top-level category, while Featured Search in the other pages uses the expression `{!category}` to search within the current category.

- **Article List (2)** requires no setup, but lets you specify how many articles appear in the list of returned articles.
- **Category Filter (3)** requires no setup.
- **Article Type Filter (4)** requires no setup.
Login Template Pages

The Login template provides a customized user login experience that can include your company’s branding. This template gives users advanced login options to change their password, complete a self-registration form as a new user, or log in with a third-party account. Users who use single sign-on to log in to your community do not see this login page.

This section highlights each page of the Login template and includes a summary of the components that are contained in each page.

Login

This page contains the following components.

• **Background (1)** gives your community’s login pages a unique appearance.
• **Community Logo (2)** identifies your community brand. Set the logo in the Administration Settings for the community. For more information, see “Customizing Communities Login” in the Salesforce Help.
**Login Form** (3) allows users to provide their username and password. The Login form includes links to the Forgot Password and Self-Register pages so that users who are having trouble logging in or who don’t have current accounts have a self-service option. 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.

**Social Login** (4) gives users the ability to log in by using their accounts from identity providers such as Facebook© or LinkedIn©.

**Employee Login** (5) provides a link to log in for users with accounts in the parent organization.

### Forgot Password

![Password Reset Form](image)

This page contains the following components.

- **Rich Content Editor** (1) identifies the page.
- **Rich Content Editor** (2) provides instructions for users.
- **Forgot Password Form** (3) provides a field to collect a username and a button to submit the request to reset the password.
- **Rich Content Editor** (4) gives users a Cancel link for returning to the Login page.
Check Password

Check the email account associated with your user name for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter.

If you still can't log in, contact your administrator.

Back to login

This page contains the following components.

- Rich Content Editor (1) identifies the page.
- Rich Content Editor (2) provides instructions for users.
- Rich Content Editor (3) gives users a link to return to the Login page.

Login Error

This page displays an error message that you configure by changing the text in a Rich Content Editor component.
Register

Join the community to receive personalized information and customer support.

First Name

Last Name

Email

Sign Up

Already have an account?
or log in with

Social Login (5) gives users the option to log in using their accounts from third-party identity providers, such as Facebook© or LinkedIn©.

Community Logo (1) to identify your community brand. The logo is set in the Administration Settings for the community. For more information, see “Customizing Communities Login” in the Salesforce Help.

Rich Content Editor (2) provides instructions for users.

Self-Registration Form (3) provides fields for users to enter their own information. The fields can be customized to collect various information.

Rich Content Editor (4) gives users a chance to return to the login page to log in with an existing account.

This page contains the following components.
Which Components Can I Use with Each Template?

Lightning community templates, such as Customer Service (Napili), Partner Central, and Aloha, 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: 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.

<table>
<thead>
<tr>
<th>Component</th>
<th>Customer Service (Napili) and Lightning Bolt Solutions</th>
<th>Partner Central</th>
<th>Customer Account Portal</th>
<th>Build Your Own</th>
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## Components for Building Your Community

### Which Components Can I Use with Each Template?

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### Components for Building Your Community

#### Which Components Can I Use with Each Template?

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<th>Component</th>
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<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Search &amp; Post Publisher</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Search Results</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Set Case Status Button</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Snap-ins Chat</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Summer ’17 and later</td>
</tr>
<tr>
<td>Stream Detail</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ’18 and later</td>
</tr>
<tr>
<td>Stream List</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ’18 and later</td>
</tr>
<tr>
<td>Survey</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ’18 and later</td>
</tr>
<tr>
<td>Tabs</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>Tile Menu (Beta)</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Top Article by Topic</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>Topic Catalog</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Spring ’16 and later</td>
</tr>
<tr>
<td>Topic Description</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Spring ’16 and later</td>
</tr>
<tr>
<td>Component</td>
<td>Customer Service (Napili) and Lightning Bolt Solutions</td>
<td>Partner Central</td>
<td>Customer Account Portal</td>
<td>Build Your Own</td>
<td>Available in Versions</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------------------------------------</td>
<td>-----------------</td>
<td>-------------------------</td>
<td>----------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Topic Metrics</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>Totals</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>Trending Articles by Topic</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’17 and later</td>
</tr>
<tr>
<td>Trending Topics</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’15 and later</td>
</tr>
<tr>
<td>Unanswered Questions</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>User Profile</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’16 and later</td>
</tr>
<tr>
<td>User Profile Detail</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’16 only</td>
</tr>
<tr>
<td>User Profile Image</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>All versions</td>
</tr>
<tr>
<td>User Profile Knowledgeable About</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’16 and later</td>
</tr>
<tr>
<td>User Profile Menu</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Winter ’18 and later</td>
</tr>
<tr>
<td>User Profile Related List</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’16 and later</td>
</tr>
<tr>
<td>User Profile Stats</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’15 and Summer ’15</td>
</tr>
<tr>
<td>User Profile Summary</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>All versions</td>
</tr>
<tr>
<td>User Profile Tabs</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’15 and later</td>
</tr>
<tr>
<td>User Settings</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’15 and later</td>
</tr>
<tr>
<td>Visualforce Page Component</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Spring ’17 and later</td>
</tr>
<tr>
<td>Wave Dashboard</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Summer ’17 and later</td>
</tr>
</tbody>
</table>

**Note:**

1. Contact Support is included as part of the Contact Support & Ask Buttons component.
## Login Template Components

<table>
<thead>
<tr>
<th>Component</th>
<th>Available in Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background</td>
<td>All versions</td>
</tr>
<tr>
<td>Set Up the Content Block</td>
<td>Before Winter ’16</td>
</tr>
<tr>
<td>Custom Code</td>
<td>Before Winter ’16</td>
</tr>
<tr>
<td>Employee Login Link</td>
<td>All versions</td>
</tr>
<tr>
<td>Forgot Password</td>
<td>All versions</td>
</tr>
<tr>
<td>Login Form</td>
<td>All versions</td>
</tr>
<tr>
<td>Self-Registration</td>
<td>All versions</td>
</tr>
<tr>
<td>Social Login</td>
<td>All versions</td>
</tr>
</tbody>
</table>

## 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:** 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.

<table>
<thead>
<tr>
<th>Component</th>
<th>Koa</th>
<th>Kokua</th>
<th>Available in Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article List</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Article Type Filter</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Article Content</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Back Button</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Attachments</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Banner</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Comments</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Comments Publisher</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Detail</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Case Feed</td>
<td>✔️</td>
<td>✔️</td>
<td>Summer ’15 and later</td>
</tr>
<tr>
<td>Case Feed Publisher</td>
<td>✔️</td>
<td>✔️</td>
<td>Summer ’15 and later</td>
</tr>
</tbody>
</table>
### Components for Building Your Community

#### 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.

<table>
<thead>
<tr>
<th>Component</th>
<th>Koa</th>
<th>Kokua</th>
<th>Available in Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case List</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Category Filter</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Category Navigation</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Contact Support &amp; Ask Buttons</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Create Case Form</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Expanded Category Navigation</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Featured Data Categories</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Featured Search</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Feed Post &amp; Comments</td>
<td>✔️</td>
<td>✔️</td>
<td>Summer ‘15 and later</td>
</tr>
<tr>
<td>HTML Editor</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Language Picker</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ‘16 and later</td>
</tr>
<tr>
<td>Profile Header</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ‘16 and later</td>
</tr>
<tr>
<td>Rich Content Editor</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ‘16 and later</td>
</tr>
<tr>
<td>Search</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Set Case Status Button</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Toggle Button</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>Trending Articles</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>User Profile Image</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>User Profile Summary</td>
<td>✔️</td>
<td>✔️</td>
<td>All versions</td>
</tr>
<tr>
<td>User Profile Summary &amp; Image</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ‘16 and later</td>
</tr>
</tbody>
</table>

**CUSTOM COMPONENTS**

<table>
<thead>
<tr>
<th>Component</th>
<th>Koa</th>
<th>Kokua</th>
<th>Available in Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Lightning Components</td>
<td>✔️</td>
<td>✔️</td>
<td>Winter ‘16 and later</td>
</tr>
</tbody>
</table>
1. Select the **Article List** component in the page you’re configuring.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>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.</td>
</tr>
<tr>
<td>Page Size</td>
<td>Enter the number of articles per page of the list. The default is 25.</td>
</tr>
<tr>
<td>Article Type</td>
<td>Specify the type of article to appear in the list.</td>
</tr>
<tr>
<td>Search Term</td>
<td>Leave this field blank. It’s the field in which users type their search queries.</td>
</tr>
</tbody>
</table>

**Example:** Sample Article List component:

![Sample Article List component](image)

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:

<table>
<thead>
<tr>
<th>Category</th>
<th>Articles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thanksgiving</td>
<td>How to prepare baked ham for Thanksgiving dinner, How to make amazing stuffing for Thanksgiving, How to roast the perfect turkey for Thanksgiving</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Id</td>
<td>This value is retrieved when the individual article is selected.</td>
</tr>
<tr>
<td>URL Name</td>
<td>This value is retrieved when the individual article is selected.</td>
</tr>
<tr>
<td>Show title in the article header</td>
<td>Select this option to show the title in the article’s header.</td>
</tr>
<tr>
<td>Allow voting on articles</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Example:** Sample Article Content component:

![Sample Article Content component](image)

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 (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic ID</td>
<td>The system supplies this value, and populates the component with articles specific to the topic shown on the topic detail page.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter text for the title. The default text is Articles With This Topic.</td>
</tr>
<tr>
<td>Show Title</td>
<td>Show the title by checking this box.</td>
</tr>
</tbody>
</table>
Details

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Articles</td>
<td>Select the number of articles you’d like to show at a time. The default number is 10.</td>
</tr>
</tbody>
</table>

Example: Sample Articles With This Topic component:

![Sample Articles With This Topic component](image)

SEE ALSO:

Which Components Can I Use with Each Template?

Ask Button

The Ask Button component lets users click a button and ask a question that is published to the community. Guest 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 (Napili) 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 also remove one button or use different text for each button.

1. Select the Ask Button component in the page you’re configuring.
2. In the property editor, configure properties for the component:
**Ask Button**

Let users ask the community a question.

**Button Label**

Enter the text you’d like to display on the Ask Button. The default text is Ask a Question.

- **Show topics**
  - Select to show the Add Topic field below the Details section of a question (1).

- **Show details**
  - Select to show the Details section expanded when the Ask dialog opens (2). Clear the check box if you want the Details section to be collapsed by default. Members can still expand the Details section by clicking the arrow next to the Details label.

---

**Property** | **Details**
--- | ---
**Button Label** | Enter the text you’d like to display on the Ask Button. The default text is Ask a Question.
**Show topics** | Select to show the Add Topic field below the Details section of a question (1).
**Show details** | Select to show the Details section expanded when the Ask dialog opens (2). Clear the check box if you want the Details section to be collapsed by default. Members can still expand the Details section by clicking the arrow next to the Details label.
Example: Sample Ask Button component:

SEE ALSO:
Which Components Can I Use with Each Template?

Back Button

The Back Button component displays a button that lets users navigate to the previous context.

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:

![Example Back Button component](image)

SEE ALSO:
Which Components Can I Use with Each Template?

# Breadcrumb

Use the Breadcrumb component in the Customer Service (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Name or ID</td>
<td>Use <code>{!topicID}</code> on topic pages, <code>{!feedItemID}</code> on question or feed item pages, and <code>{!urlName}</code> on article pages.</td>
</tr>
</tbody>
</table>

**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**

View your events and others’ calendars from your Lightning community on your desktop or mobile device.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>List View Name</td>
<td>This field looks up to the list view of campaigns created by the admin.</td>
</tr>
<tr>
<td>Show Image</td>
<td>Select this option to display the Image field on a campaign.</td>
</tr>
</tbody>
</table>

**Example:**

![Campaign Marketplace](image)

**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. Instead, use one of the generic record components and associate it with the case object.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Case ID</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

**Example:** Sample Case Attachments component:

![Sample Case Attachments component](image)

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. Instead, use one of the generic record components and associate it with the case object.

1. Select the **Case Banner** component in the page you’re configuring.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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 shows a list of all the comments that a customer and an agent have added to the 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. Instead, use one of the generic record components and associate it with the case object.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Example:** Sample Case Comments component:

![Sample Case Comments component](image)

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 displays articles or discussions based on the typed text. If users don't see an answer, they can continue to contact support for help.

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.

2. In the property editor, configure properties for the component:
## Components for Building Your Community

### General Settings

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Text that displays above suggested articles and discussions. The default is <em>Need Answers Fast?</em></td>
</tr>
<tr>
<td><strong>Subtitle</strong></td>
<td>Subtitle displayed above suggested articles and discussions. The default is <em>Find what you need here.</em></td>
</tr>
<tr>
<td><strong>Maximum Suggestions to Display</strong></td>
<td>Maximum suggested articles and discussions to display. The default is 6.</td>
</tr>
</tbody>
</table>

### Empty State Content

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Topic ID</strong></td>
<td>Set a specific topic to show before community users start entering text in the Contact Support Form component. If you leave this field empty, the component displays trending topics.</td>
</tr>
</tbody>
</table>

### Content Types

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Articles</strong></td>
<td>Select to include articles in suggestions.</td>
</tr>
<tr>
<td><strong>Discussions</strong></td>
<td>Select to include discussions in suggestions.</td>
</tr>
</tbody>
</table>

### Deflection Metrics

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ask users if they’re satisfied with the suggested content</strong></td>
<td>Users decide whether the suggested articles and discussions helped solve their case.</td>
</tr>
<tr>
<td><strong>Satisfaction Prompt</strong></td>
<td>Prompt asking users if they’re satisfied with suggestions. Default text is: <em>Did the content help solve your issue?</em></td>
</tr>
<tr>
<td><strong>Ask follow-up prompt</strong></td>
<td>If users answer the first question, you have the option of asking a follow-up question.</td>
</tr>
<tr>
<td><strong>Follow-Up Prompt</strong></td>
<td>Default text is: <em>Stop creating your case?</em></td>
</tr>
<tr>
<td><strong>Redirect URL for Abandoned Cases</strong></td>
<td>The URL of the site you’d like your users to see if they abandon their case.</td>
</tr>
<tr>
<td><strong>Confirmation Message</strong></td>
<td>Default text is: <em>Got it!</em></td>
</tr>
</tbody>
</table>
Example: Sample Case Deflection component:

![Contact Customer Support](image)

**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.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>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.</td>
</tr>
<tr>
<td>Publisher Placeholder Text</td>
<td>Enter the text that appears in the search bar. The default value is <strong>Write a new comment...</strong></td>
</tr>
<tr>
<td>Mobile Header Text</td>
<td>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.</td>
</tr>
<tr>
<td>Can Attach Files</td>
<td>Lets users attach a file to the comment.</td>
</tr>
<tr>
<td>Post Button Label</td>
<td>Enter the text for the button that submits the case or comment.</td>
</tr>
</tbody>
</table>
**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. Instead, use one of the generic record components and associate it with the case object.

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>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.</td>
</tr>
</tbody>
</table>
## 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. Instead, use one of the generic record components and associate it with the case object.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>Enter this value: <code>{!recordId}</code></td>
</tr>
</tbody>
</table>
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. Instead, use one of the generic record components and associate it with the case object.

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 (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>Enter this value: {!recordId}</td>
</tr>
<tr>
<td>Publisher Placeholder Text</td>
<td>Text that appears in the search bar. The default value is Write a new post...</td>
</tr>
<tr>
<td>Mobile Header Text</td>
<td>Text that appears as the header for mobile users. Mobile and tablet users see the text as the header for the post text area.</td>
</tr>
<tr>
<td>Can Attach Files</td>
<td>Lets users attach a file to the post.</td>
</tr>
<tr>
<td>Post Button Label</td>
<td>Text for the button that submits the post.</td>
</tr>
</tbody>
</table>

Note: Before Spring ’16, this component was named Case Chatter Publisher.
Example: Sample Case Feed Publisher component:

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. Instead, use one of the generic record components and associate it with the case object.

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:
Components for Building Your Community

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category Name</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

SEE ALSO:

Which Components Can I Use with Each Template?
Example: Sample Category Filter component:

![Category Filter component](image)

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>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.</td>
</tr>
</tbody>
</table>
Details

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-Collapse</td>
<td>Select the checkbox to have the category navigation component collapse automatically after a category is selected.</td>
</tr>
</tbody>
</table>

**Example:** Sample Category Navigation component:

![Sample Category Navigation component](image)

**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 in your CMS Connect workspace. Then choose **Use in Builder** for the connection you want to use.

![CMS Connections](image)

1. From the Component panel in Community Builder, drag a CMS Connect component to the page and location where you want to display it.

239
2. Select the component. In the property editor, configure its properties.

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMS Source</td>
<td>Select the CMS source that contains the content to display. If no sources are listed, click Manage Connections to set one up.</td>
</tr>
<tr>
<td>Component Path</td>
<td>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 <code>content/capricorn</code> for the root path, enter only <code>banner1</code> for the component path. If your connection doesn't have a root path, enter the full path for the component.</td>
</tr>
</tbody>
</table>

**CMS Connect (JSON) (Beta)**

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 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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMS Source</td>
<td>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.</td>
</tr>
<tr>
<td>JSON Content</td>
<td>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.</td>
</tr>
<tr>
<td>Component Path</td>
<td>Applies only for content items. Enter the path to the component to display. For example, enter the ID of a blog.</td>
</tr>
<tr>
<td>Content List Node Path</td>
<td>Applies only for content lists. Enter a JSON expression for the starting node of the content list. For example, enter <code>@posts</code>.</td>
</tr>
<tr>
<td>Property</td>
<td>Details</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Content List Layout</td>
<td>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.</td>
</tr>
<tr>
<td>Content List Item Layout</td>
<td>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}.</td>
</tr>
<tr>
<td>Content Item Layout</td>
<td>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.</td>
</tr>
<tr>
<td>Items Per Page</td>
<td>Enter the number of content items that display on each page.</td>
</tr>
<tr>
<td>Columns</td>
<td>Enter the number of columns of content items that display on desktops and tablets. Phones display content items in a single column.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a JSON expression or text for the title, such as @title.</td>
</tr>
<tr>
<td>Author</td>
<td>Enter a JSON expression or text for the author, such as @author/name.</td>
</tr>
<tr>
<td>Published On</td>
<td>Enter a JSON expression or text in ISO format for the publish date. For example, @date or YYYY-MM-DDTHH:mm:ss.sssZ.</td>
</tr>
<tr>
<td>Body</td>
<td>Enter a JSON expression or text for the content body, such as @content.</td>
</tr>
<tr>
<td>Image Source</td>
<td>Enter a JSON expression for the image source of the content item, such as @featured_image.</td>
</tr>
<tr>
<td>Navigation section</td>
<td>Set up the navigation link for content items in your content list.</td>
</tr>
<tr>
<td>Link Text</td>
<td>Enter the link text to display on your community page. The default is Read More.</td>
</tr>
<tr>
<td>Type</td>
<td>Select whether the link points to a generated page or an external URL with the content items in your content list.</td>
</tr>
<tr>
<td>Page</td>
<td>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.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the fully qualified URL to the content.</td>
</tr>
</tbody>
</table>

**Note:** You can also specify JSON expressions, such as @link.

**Note:** This release contains a beta version of the JSON connector, which means it's a high-quality feature with known limitations. The JSON connector 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 on the basis of generally available products and features. You can provide feedback and suggestions for CMS Connect in the Community Cloud group in the Trailblazer Community.

## 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 **Show Calendar Sidebar** to display details in the side panel of the calendar component or 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. You can set up a calendar to show details in the side panel or hide it by default. You can also share your My Events calendars with other team members and add their calendars to your view.

1. Select the **Calendar** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Calendar Sidebar</td>
<td>Select this option to display the calendar sidebar by default. To work with this item, use the full Salesforce site</td>
</tr>
<tr>
<td>Show Other Calendars</td>
<td>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.</td>
</tr>
<tr>
<td>Let Users Create New Calendars</td>
<td>Turn on this option to create a new calendar from this page. To work with this item, use the full Salesforce site.</td>
</tr>
</tbody>
</table>

**Example:**

![Calendar Example](calendar_example.png)

---

**Contact Support & Ask Buttons**

The Contact Support & Ask Buttons component adds two buttons to the page: one that lets users click a button to create a case, and another that allows members ask a question and publish it to the community. 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. 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.

1. Select the Contact Support & Ask Buttons component in the page you’re configuring.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header Label</td>
<td>The text you’d like to display at the top of the component.</td>
</tr>
<tr>
<td>Ask Community Label</td>
<td>The text you’d like to display on the button that members can click to ask a question from the community. The default text is Ask a Question.</td>
</tr>
<tr>
<td>Contact Support Label</td>
<td>The text you’d like to display on the button that users can click to create a case. The default text is Contact Support.</td>
</tr>
</tbody>
</table>

Example: Sample Contact Support & Ask Buttons component:

![Contact Support & Ask Buttons component](image)

SEE ALSO:

Which Components Can I Use with Each Template?

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Settings</strong></td>
<td>Click to expand the section with general setting properties.</td>
</tr>
<tr>
<td>Title</td>
<td>Text that displays at the top of the form customers use to create a case. The default is <em>Contact Customer Support</em>.</td>
</tr>
<tr>
<td>Subtitle</td>
<td>Subtitle at the top of the form customers use to create a case. The default is <em>Tell us how we can help</em>.</td>
</tr>
<tr>
<td><strong>Authenticated Users</strong></td>
<td>Click to expand.</td>
</tr>
<tr>
<td>Global Action</td>
<td>A global action that allows users to create cases. The global action must be a Create a Record type, and on the case object.</td>
</tr>
<tr>
<td>Configure global actions for authenticated users</td>
<td>Link to the area in Salesforce Setup where you can create global actions.</td>
</tr>
<tr>
<td>Attach files</td>
<td>Select to allow users to attach files to their cases. They can upload up to 10 files.</td>
</tr>
<tr>
<td><strong>Guest Users</strong></td>
<td>Click to expand.</td>
</tr>
<tr>
<td>Global Action</td>
<td>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.</td>
</tr>
<tr>
<td>Configure global actions for guest users</td>
<td>Link to the area in Salesforce Setup where you can configure global actions for guest users.</td>
</tr>
<tr>
<td><strong>Confirmation Text</strong></td>
<td>Click to expand.</td>
</tr>
<tr>
<td>Confirmation Title</td>
<td>The title at the top of the page confirming that a case was created. Default text is <em>Your case was created</em>.</td>
</tr>
<tr>
<td>Confirmation Subtitle</td>
<td>More information under the confirmation title, after a case was created. Default text is <em>We’ll get back to you soon</em>.</td>
</tr>
<tr>
<td>Case Summary</td>
<td>Shows the case subject and case number for the user’s future reference.</td>
</tr>
<tr>
<td>Show Call to Action button</td>
<td>Select this option to have folks take a follow-up action after filing a case.</td>
</tr>
<tr>
<td>Call to Action</td>
<td>The URL of the site you’d like your users to see after filing a case.</td>
</tr>
<tr>
<td>Call to Action Text</td>
<td>Call to action text label, based on what you’d like your users to do.</td>
</tr>
<tr>
<td>Call to Action Button Text</td>
<td>Text label for the call to action button.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Settings</td>
<td>Click to expand the section with general setting properties.</td>
</tr>
<tr>
<td>Attach Files</td>
<td>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.</td>
</tr>
<tr>
<td>Property</td>
<td>Details</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Header Title</td>
<td>Text that displays at the top of the page customers use to create a case. The default is Email Customer Support.</td>
</tr>
<tr>
<td>Confirmation Message Title</td>
<td>Text that appears as the title of the message confirming that the case has been created. The default is: Your request was submitted successfully.</td>
</tr>
<tr>
<td>Confirmation Message Description</td>
<td>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.</td>
</tr>
<tr>
<td>Actions in the Publisher</td>
<td>Click to expand the section with action properties.</td>
</tr>
<tr>
<td>Signed-In User Case Action</td>
<td>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.</td>
</tr>
<tr>
<td>Guest User Case Action</td>
<td>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.</td>
</tr>
<tr>
<td>Case Deflection</td>
<td>Click to expand the section with case deflection properties.</td>
</tr>
<tr>
<td>Use Case Text to Suggest Articles</td>
<td>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.</td>
</tr>
<tr>
<td>Number of Articles</td>
<td>Number of articles that display in the component.</td>
</tr>
<tr>
<td>Top-Level Category</td>
<td>Top-level data category for template-driven communities using data categories. This is the data category that articles used for deflection come from.</td>
</tr>
<tr>
<td>Category Group name for article deflection</td>
<td>Data category group name for template-driven communities using data categories.</td>
</tr>
<tr>
<td>Deflection Banner Text</td>
<td>Text that displays as the title of the deflection area of the page. The default is Need Answers Fast?.</td>
</tr>
<tr>
<td>Deflection Text</td>
<td>Text that displays as the subtitle in the deflection area of the page.</td>
</tr>
<tr>
<td>Mobile-Only Deflection Text</td>
<td>Text that displays in the deflection area for users of mobile devices.</td>
</tr>
<tr>
<td>reCAPTCHA Settings</td>
<td>Click to expand the section with reCAPTCHA settings.</td>
</tr>
<tr>
<td>reCAPTCHA for Guest Case Creation</td>
<td>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.</td>
</tr>
<tr>
<td>Secret Key for reCAPTCHA</td>
<td>Enter the key that you received when you registered for the service.</td>
</tr>
</tbody>
</table>

**Note:** To use Google’s reCAPTCHA service, go to the [Google reCAPTCHA](https://reCAPTCHA.google.com) website, register your domain, and receive a secret and site key pair. For details on which languages are supported in the widget, see the reCAPTCHA website. Google reCAPTCHA is a resource provided by Salesforce to support its users and partners, but is not considered part of our Services for purposes of the salesforce.com Master Subscription Agreement.
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 (Napili), 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.

![Sample Create Record Form component](image)

Custom Lightning Components

Incorporate custom Lightning components in your community design in Community Builder.

To use custom Lightning components in your community:

- Implement each component from the Developer Console as shown in this example:

  ```xml
  <aura:component
    implements="forceCommunity:availableForAllPageTypes"
    access="global">
  ...
  </aura:component>
  ```

- To make the component’s properties editable in Community Builder, include a design resource named `componentName.design` with your Lightning component bundle.

  **Note:** For help with developing custom Lightning components, see the Lightning Components Developer's Guide and the Lightning Components Cheat Sheet.

Custom Lightning components behave just like 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 floating component property editor:

![Dashboard Components for Building Your Community](image)

---

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Name</td>
<td>Select an available dashboard.</td>
</tr>
<tr>
<td>Height</td>
<td>Adjust the height of the dashboard. Column width controls the dashboard width.</td>
</tr>
</tbody>
</table>

**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]

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>The group’s ID. Typically, this field is populated when the page loads.</td>
</tr>
</tbody>
</table>

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>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.</td>
</tr>
<tr>
<td>Title</td>
<td>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 <em>Desserts</em>, you can change the text to <em>Easy</em></td>
</tr>
</tbody>
</table>
## 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.

### Details

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Number of Sub-Categories</td>
<td>Specify the to limit the number of child categories to display for each parent category. The default is 3.</td>
</tr>
<tr>
<td>Max Number of Categories</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Example: Sample Expanded Category Navigation component:

![Sample Expanded Category Navigation component](image)

### 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. You can set properties to choose the number of categories displayed on the page.

1. Select the **Featured Data Categories** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Data Categories</td>
<td>Type the number of data categories to display from the group. Categories display in the order listed in the data categories group.</td>
</tr>
</tbody>
</table>
| Category Image URL     | Specify the URL to display the image associated with each data category. To automatically display the image for your data categories, type 
                          {!Global.PathPrefix}/{!DataCategory.Name}.jpg in the text box. The recommended size for this image is 220 x 220 pixels. |
| 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.

1. Select the **Featured Search** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placeholder Text</td>
<td>Enter the text that appears in the search bar. The default text is <em>What would you like to know?</em></td>
</tr>
<tr>
<td>Category Name</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Property | Details
--- | ---
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 URL to display the image associated with each data category. To display the image for your data categories, type
| \{Global.PathPrefix\}/\{DataCategory.Name\}.jpg in the text box. The recommended size for this image is 1220 x 175 pixels.

#### Example: Sample Featured Search component:

![Sample Featured Search component](image)

**SEE ALSO:**
- Which Components Can I Use with Each Template?

**How Incremental Search Works with Koa and Kokua Templates**

The search text box returns articles and search strings based on matches with the characters as they are being typed.

Incremental searching gives users immediate results and helps them find the most relevant articles or popular search terms as they type their search string. The user can use the Tab or Arrow keys to display the first suggestion or select on any of the returned results to view that article.
The system queries for public knowledge articles that exist within the channel by which you’ve made the articles available. So if the user has access to the public knowledge base, only those articles appear in the search. Articles appear in the language that you’ve selected for the community.

When a user is logged in and clicks the search icon without entering any text, articles and search terms from past searches appear as suggested results.

**Featured Topics**

The Featured Topics component gives you the freedom to display your community’s designated featured topics, and the images that represents them, on any community page by simply dragging and dropping.

1. Select the **Featured Topics** component.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for the list of featured topics. The default text is <strong>Featured Topics</strong>.</td>
</tr>
<tr>
<td>Show Title</td>
<td>Check to show the title.</td>
</tr>
</tbody>
</table>
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 (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feed Type</td>
<td>Select the type of feed you’d like to place on your page.</td>
</tr>
<tr>
<td></td>
<td>Search is not supported on the Topic feed type. If you plan to enable search in a feed, select the Group or Record feed type.</td>
</tr>
<tr>
<td>Record ID</td>
<td>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.</td>
</tr>
<tr>
<td>Default Feed Filter</td>
<td>For feed entries you want your community members to see, select the default filter.</td>
</tr>
<tr>
<td>Post Style</td>
<td>Choose whether to expand or collapse post comments by default.</td>
</tr>
</tbody>
</table>
**Details**

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Let members search feeds</strong></td>
<td>Choose whether to let community members search an individual feed. Search is not supported on the <strong>Topic</strong> feed type.</td>
</tr>
<tr>
<td><strong>Let members sort feeds</strong></td>
<td>Choose whether to let community members sort a feed. When sorting is enabled, members can sort a feed by the latest posts or most recent activity.</td>
</tr>
</tbody>
</table>

**Example:** Sample Feed component

![Sample Feed component](image)

**SEE ALSO:**

*Which Components Can I Use with Each Template?*

**Feed Compact**

Use the Feed Compact component in the Customer Service (Napili) template to add a compact, scannable version of a feed to a record, a topic, a group, a user profile, or an overall community discussion. The component provides a chronological list of question posts made with the Feed Publisher component.

**Note:** The Feed Compact component displays only question posts, it doesn’t support feed filters, nor is it supported for articles.
Clicking a post directs users 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Views</td>
<td>Select to show the number of times an item is viewed. A view is counted when an item is liked, commented on, or its detail view is opened. Clear to hide the view count.</td>
</tr>
<tr>
<td>Show Likes</td>
<td>Select to show the number of likes for each post. Clear to hide the number of likes.</td>
</tr>
<tr>
<td>Show Comments</td>
<td>Select to show the number of comments for each post. Clear to hide the number of comments.</td>
</tr>
<tr>
<td>Compact Feed Type</td>
<td>Select the object or context you want to associate this feed with.</td>
</tr>
<tr>
<td>Entity Id</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Example:** Sample Feed Compact component

[Image of sample Feed Compact component]

**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:
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. Users in Koa and Kokua communities can only access the Feed Post & Comments component if the community case feed is enabled.

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 display at full size, and may be slow to load.

1. Select the Feed Publisher component in the page you’re configuring.
2. In the property editor, configure properties for the component:
Components for Building Your Community

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>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 and use the publisher actions included in the group publisher layout for your org.</td>
</tr>
<tr>
<td>Record ID</td>
<td>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.</td>
</tr>
<tr>
<td>Publisher Layout Design</td>
<td>Choose if you’d like to see the wide or narrow feed publisher layout design.</td>
</tr>
</tbody>
</table>

**Example:** Sample Feed Publisher component, wide layout

![Sample Feed Publisher component, wide layout](image)

**Example:** Sample Feed Publisher component, narrow layout

![Sample Feed Publisher component, narrow layout](image)
Example: Sample feed post with inline image

Anita Kedhar — Just Now

I love our new on-site cafe!

Like • Select as Best
SEE ALSO:

Which Components Can I Use with Each Template?

Files List

Use the Files List component in the Customer Service (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files List</td>
<td>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</td>
</tr>
</tbody>
</table>

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 only through the Lightning Flow component.
- The Guest user profile doesn’t support the Run Flows user permission, so unauthenticated users can’t run flows.
- Flow creators can overwrite error messages with their own content.
- Users can’t resume paused flows from Lightning communities, so we recommend removing the Pause button from flows that are distributed in Lightning communities.

1. Define a flow in the Cloud Flow Designer.
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.

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
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 runtime 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?
Salesforce Help: Create a Flow
Salesforce Help: Considerations for Two-Column Flows
Salesforce Help: Customize the Error Message for Running Flow Users (Best Practice)

Follow Button
The Follow Button component allows users to follow users, topics, or articles.

In the Page Editor, you can configure the follow button component on the User Profile, Article Detail, and Topic Detail pages. This component allows a user to follow another user, article, or topic by clicking this button. When a user views their own profile, the button isn’t visible.

1. Select the Follow Button component in the page you’re configuring.
2. In the property editor, configure properties for the component:
### 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Placeholder Text for Search Field</strong></td>
<td>Specify the text that appears in the search box. The default text is Search...</td>
</tr>
<tr>
<td><strong>Objects in Autocomplete Results</strong></td>
<td>Click <strong>Add</strong> to add searchable Salesforce objects to your community’s autocomplete results.</td>
</tr>
<tr>
<td><strong>Maximum Autocomplete Results</strong></td>
<td>Enter the maximum number of autocomplete results displayed to the user during a search. The default is 5.</td>
</tr>
</tbody>
</table>

**Example:** Sample Global Search Box component in Partner Central:

![Sample Global Search Box component](image-url)

**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 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. Global Search for Peer-to-Peer Communities is available in the Customer Service (Napili) template.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placeholder Text for Search Field</td>
<td>Enter the text that appears in the search box. The default text is Search...</td>
</tr>
<tr>
<td>Autocomplete Search</td>
<td>Click to expand the section with autocomplete search properties.</td>
</tr>
<tr>
<td>Use autocomplete in searches</td>
<td>Select to let users see suggested search results as they type search terms.</td>
</tr>
<tr>
<td>Maximum Autocomplete Results</td>
<td>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.</td>
</tr>
<tr>
<td>Limit autocomplete search results to Discussions and Articles</td>
<td>Select to show only discussions and articles in autocomplete results.</td>
</tr>
<tr>
<td>Objects in Autocomplete Results</td>
<td>Click Add to add searchable Salesforce objects to your community’s autocomplete results.</td>
</tr>
<tr>
<td>Ask Community</td>
<td>Click to expand the section with properties regarding asking the community.</td>
</tr>
<tr>
<td>Show footer during search</td>
<td>Select to display the footer that gives members an option to ask the community a question.</td>
</tr>
<tr>
<td>Post to Ask the Community</td>
<td>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?.</td>
</tr>
<tr>
<td>Create Your Question Prompt</td>
<td>Enter the text that users click to ask a question. The default is: Ask a question.</td>
</tr>
<tr>
<td>Create Your Sign-In Prompt</td>
<td>Enter the text that directs users to a login page before they ask a question. The default is: Sign in to ask a question.</td>
</tr>
<tr>
<td>Show topics</td>
<td>Allows users to add topics to the questions that they ask the community.</td>
</tr>
<tr>
<td>Show details</td>
<td>Allows users to enter details of the question that they ask the community.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>{!searchString}</td>
<td>The system supplies this search term to search across the community.</td>
</tr>
<tr>
<td>Show the All results tab</td>
<td>Check the box to show search results in one list under All.</td>
</tr>
<tr>
<td>Search Results Tabs</td>
<td>Add or remove tabs to customize which lists search results are displayed in.</td>
</tr>
</tbody>
</table>

**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?
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>The ID of the group. This value is automatically populated when the group is displayed.</td>
</tr>
<tr>
<td>Feed Tab Label</td>
<td>The label used for the group feed tab on mobile devices. The default text is <em>Feed</em>. The label you specify here doesn’t affect labels on desktop browsers.</td>
</tr>
<tr>
<td>Details Tab Label</td>
<td>The label used for the group details tab on mobile devices. The default text is <em>Details</em>. The label you specify here doesn’t affect labels on desktop browsers.</td>
</tr>
<tr>
<td>Related Tab Label</td>
<td>The label used for the related lists tab on mobile devices. The default text is <em>Related</em>. The label you specify here doesn’t affect labels on desktop browsers.</td>
</tr>
</tbody>
</table>

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>The ID of the group. This value is automatically populated when the group is displayed.</td>
</tr>
</tbody>
</table>

**Example:** Sample Group Banner component

![Sample Group Banner component](image)

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>The ID of the group. This value is automatically populated when the group is displayed.</td>
</tr>
<tr>
<td>Header label</td>
<td>The label for the group details section. Affects both the desktop and mobile view.</td>
</tr>
</tbody>
</table>

**Example:** Sample Group Detail component
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>The ID of the group. This value is automatically populated when the group is displayed.</td>
</tr>
</tbody>
</table>

**Example:** Sample Group Related List component

![Sample Group Related List component](image-url)
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter the static text for the page’s headline. The default text for the page is Welcome!.</td>
</tr>
<tr>
<td>Banner Text</td>
<td>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.</td>
</tr>
<tr>
<td>Page Type</td>
<td>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.</td>
</tr>
<tr>
<td>Unique Name or ID</td>
<td>The system retrieves the ID from the URL of the question or article when it’s selected.</td>
</tr>
<tr>
<td>Banner Text with Articles and Discussions</td>
<td>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.</td>
</tr>
<tr>
<td>Banner Text with Discussions</td>
<td>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.</td>
</tr>
<tr>
<td>Show Subtopics</td>
<td>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.</td>
</tr>
</tbody>
</table>

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:
<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter <code>{!topicName}</code> to retrieve and display the topic name on the topic detail page.</td>
</tr>
<tr>
<td>Page Type</td>
<td>Enter <code>topic</code> as the page type.</td>
</tr>
<tr>
<td>Show Subtopics</td>
<td>Select this option to display subtopics.</td>
</tr>
</tbody>
</table>

**Example:** Sample Headline component:

![Sample Headline component](image)

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.

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, declar, default, defer, dir, disabled, download, enctype, face, for, frameborder, height, href, hreflang, hspace, http-equiv, id, ismap, label, lang, language, link, list, loop, longdesc, marginheight,
Featured Topics & Feeds

The Featured Topics & Feeds component displays Featured Topics, Discussions, and My Feed in a tabbed setting. Community members must be logged in to see the My Feed 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 to add it.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Featured Tab Label</td>
<td>Enter the text you’d like to display on the tab that users select to show topics. The default text is <strong>Featured</strong>.</td>
</tr>
<tr>
<td>Discussion Tab Label</td>
<td>Enter the text you’d like to display on the tab that users select to show discussions. The default text is <strong>Discussions</strong>.</td>
</tr>
<tr>
<td>My Feed Label</td>
<td>Enter the text you’d like to display on the tab that users select to show their feed. The default text is <strong>My Feed</strong>.</td>
</tr>
<tr>
<td>Compact Feed in Discussion Tab</td>
<td>Select to use the compact version of the feed in 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.</td>
</tr>
</tbody>
</table>
**Example:** Sample Featured Topics & Feeds component:

![Sample Featured Topics & Feeds component]

SEE ALSO:

Which Components Can I Use with Each Template?

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**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for the component. The default text is Knowledgeable People.</td>
</tr>
<tr>
<td>Topic ID</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 (Napili) 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 Picker

The Language Picker component lets guest users select their preferred language on a page in your community.

You can add the language picker 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 picker. 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 the guest user wants to view the community in a different language, they can select their preferred language using the language picker. The language picker 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 picker 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.

1. Select the Language Picker component in the page you’re configuring.
2. In the property editor, configure properties for the component:
To specify how the language picker is aligned on the page, enter **Left**, **Center**, or **Right**. The default value is **Center**.

**Example:** Sample Language Picker component with drop-down language list visible:

![Language Picker Example](image)

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Specify a title for the lead inbox. The default title is <strong>Lead Inbox</strong>.</td>
</tr>
<tr>
<td><strong>Number of Leads</strong></td>
<td>Specify the number of leads to display in the lead inbox. The default value is <strong>5</strong>.</td>
</tr>
<tr>
<td><strong>Sort Order</strong></td>
<td>Select a sort order for the list of leads. You can sort by the date on which the lead was created, ascending or descending.</td>
</tr>
</tbody>
</table>
**Details**

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link to the leads list view</td>
<td>Select to show a link to a lead list view on the lead inbox.</td>
</tr>
<tr>
<td>Linked List View</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Example:** Sample Lead Inbox Component

![Lead Inbox Component](image)

**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 (Napili), 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
<tr>
<td>Show banner image at top</td>
<td>Shows a banner image at the top of the Member Profile component. If unselected, no banner image is seen.</td>
</tr>
<tr>
<td>Edit Banner Image</td>
<td>Choose a banner image to show at the top of the Member Profile component.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
</table>
| Group ID       | The group’s ID. Typically, this field is populated when the page loads.
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header Label</td>
<td>Enter a title for the component. The default text is <em>Recent Messages</em>.</td>
</tr>
</tbody>
</table>

**Example:** Sample Message Notification component:

![Sample Message Notification component](image)

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 (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic Menu Label</td>
<td>Enter the text you want to appear as the label for the drop-down list of topics that appears in the navigation bar.</td>
</tr>
</tbody>
</table>
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.
      • 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**

Drag and drop the New Message Button on a community page to allow community members to start a direct message conversation from that location.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The ID of the user sending the message. The system automatically detects and populates this value.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a title for the component. The default text is <em>Send Message</em>.</td>
</tr>
</tbody>
</table>

**Example:** Sample New Message Button component:
Path

Use the Path component in Lightning communities on opportunity, lead, campaign, contract, order, and custom object detail pages to show various stages of a business process.

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 see paths on mobile devices, configure a custom path for mobile in your Salesforce org.

1. Set up a sales process in your org.
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 you’re configuring.

Example: Sample Path component:

![Sample Path component](image)

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.
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Filter Name or ID</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Include Contact Support</td>
<td>Select this checkbox to include the option to contact an agent from the profile.</td>
</tr>
<tr>
<td>Home Label</td>
<td>Enter the text you want to show for the link to the community home page from the user navigation menu. The default text is <em>Home</em>.</td>
</tr>
<tr>
<td>View Profile Label</td>
<td>Enter the text you want to show for the link to the profile detail page. The default text is <em>View Profile</em>.</td>
</tr>
<tr>
<td>Contact Support Label</td>
<td>Enter the text you want to show for the link to the page where the user can open a case. The default text is <em>Contact Support</em>.</td>
</tr>
<tr>
<td>Login Label</td>
<td>Enter the text you want to show for the link to log in to the community. The default text is <em>Login</em>.</td>
</tr>
<tr>
<td>Logout Label</td>
<td>Enter the text you want to show for the link to log out from the community. The default text is <em>Log Out</em>.</td>
</tr>
<tr>
<td>Community Management</td>
<td>Enter the text you want to show for the link to the Community Management page. The default text is <em>Community Management</em>. This link only appears for users with permissions to manage the community.</td>
</tr>
<tr>
<td>Community Setup Label</td>
<td>Enter the text you want to show for the link to the setup page for communities. The default text is <em>Community Setup</em>. This link is shown to users with permissions to create or modify the community’s administration settings.</td>
</tr>
<tr>
<td>User Settings (Customer Service (Napili) template only)</td>
<td>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 <em>My Settings</em>.</td>
</tr>
<tr>
<td>Show User Settings in Menu (Customer Service (Napili) template only)</td>
<td>Select this checkbox to show user setting in the profile drop-down list.</td>
</tr>
</tbody>
</table>
**Details Property**
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 (Napili) 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:

![Sample Profile Header component](image)

---

**SEE ALSO:**

Which Components Can I Use with Each Template?

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**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Enter a title for the component. The default text is <em>Popular Now</em>.</td>
</tr>
</tbody>
</table>

**Example:** Sample Recommendations component
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Enter a title for the component. The default text is <em>Recommended</em>.</td>
</tr>
<tr>
<td><strong>Recommendation Channel</strong></td>
<td>Choose the recommendation channel. The default is <em>Default Channel</em>. 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.</td>
</tr>
</tbody>
</table>
Example: Sample Recommendations Carousel component

RECOMMENDED FOR YOU

Best Colombian Coffee deals in May

Great coffee

Deals in May

I’m not interested

SEE ALSO:
- Customize Recommendations in Communities
- Which Components Can I Use with Each Template?

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 (Napili) 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:
Components for Building Your Community  

### Record Detail

Use this component to share record details in a community built using the Customer Service (Napili) 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.

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID</td>
<td>The ID of the record displayed. Typically, this field automatically picks up the record ID when the page loads.</td>
</tr>
</tbody>
</table>

**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. Let’s dive in and look at it more closely.
The Customer Service (Napili) 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.

- 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.
- 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.

**Note:** Emails are supported in accounts, contacts, leads, opportunities, and campaigns.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID</td>
<td>The ID of the record. This value is automatically populated.</td>
</tr>
<tr>
<td>Details Tab Label</td>
<td>Label for the tab that shows record details. The default label is Details.</td>
</tr>
<tr>
<td>Related Tab Label</td>
<td>Label for the tab that shows lists of related records. The default label is Related.</td>
</tr>
<tr>
<td>Discussion Tab Label</td>
<td>Label for the tab that shows the record feed. The default label is Discussions. This label is used on mobile devices only.</td>
</tr>
</tbody>
</table>

**Example:** Sample Record Information Tabs component in the Customer Service (Napili) template.

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. The Customer Service (Napili) template provides 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 accounts, cases, contacts, campaigns, campaign members, groups, leads, opportunities, and custom 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.
- The Record List component is available in two layouts—Full and Compact—so you can choose the one that best meets your needs. 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.
- Community members with the necessary permissions can use the New button on the component to create records. This button doesn’t display on mobile devices.
- Community members can click to filter the list view or remove filters. They can also click to view related charts. These buttons don’t display on mobile devices.
- Related List row-level actions are not available on mobile for Lightning Communities.

1. Select the Record List component on the Record List page.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>The number of entries retrieved to show in the list view. The default is 25. When the compact layout is selected, this is the number of records shown. If there are more than 25 records, you 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 is 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.</td>
</tr>
<tr>
<td>Layout</td>
<td>Choose from full layout or compact layout. When choosing the layout, consider the following:</td>
</tr>
<tr>
<td></td>
<td>- Compact layout works in any size column. For full layout, use a column width of at least 50% of the page.</td>
</tr>
<tr>
<td></td>
<td>- If using the full layout, we recommend that you don’t place a component below the Record List component on the page.</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
</tr>
</tbody>
</table>
Components for Building Your Community

Record List

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>DetailsProperty</td>
<td>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.</td>
</tr>
<tr>
<td>Page’s Object Name</td>
<td>The Salesforce object whose records you want to show. The drop-down shows the supported objects: accounts, campaigns, campaign members, cases, contacts, groups, leads, opportunities, and custom objects.</td>
</tr>
<tr>
<td>Page’s Filter Name</td>
<td>The list view to show for the selected object. The drop-down shows only list views that are valid for the object you select.</td>
</tr>
</tbody>
</table>

Example: Sample Record List component (Full layout):

![Sample Record List component (Full layout)](image)

Community members can:

- Use the menu (1) to change the list view.
- Use the New button (2) to create a record. A window pops up where a user can enter and save record details.
- Use the buttons (3) to filter the list view or view related charts.

Sample Record List component (Compact layout):

![Sample Record List component (Compact layout)](image)
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.

1. Select the **Record Related List** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Record ID</td>
<td>The ID of the parent record.</td>
</tr>
<tr>
<td>Related List Name</td>
<td>Name of the related list.</td>
</tr>
</tbody>
</table>

**Example:** Sample Record Related List component:

![Sample Record Related List component](image)

**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 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.

1. Select the **Related Articles List** component.
2. In the property editor, configure properties for the component:
Components for Building Your Community

**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.

1. Select the **Related Questions List** component.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Questions</td>
<td>Enter the maximum number of questions to display in the list. You can display up to 10 questions. The default value is 5.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a title for the list of related questions. The default text is Related Questions.</td>
</tr>
<tr>
<td>Show Views</td>
<td>Select to show the number of times a question is viewed. Clear to hide the view count.</td>
</tr>
</tbody>
</table>

**Example:** Sample Related Articles List component:

![Sample Related Articles List component](image)

SEE ALSO: [Which Components Can I Use with Each Template?](#)

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**Related Questions List Components for Building Your Community**

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Example: Sample Related Questions List component:

### RELATED QUESTIONS
- What’s the sequence to enable Launch Control? 18
- What’s the code for a tire pressure sensor issue? 16
- What kind of mileage does an E92/E90 V8 get on the highway? 11

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for the list of related topics. The default text is Related Topics List.</td>
</tr>
<tr>
<td>Topic ID</td>
<td>This field populates dynamically with the topic ID.</td>
</tr>
<tr>
<td>Show the number of people using the Topic</td>
<td>Shows the number of people who are using the topic.</td>
</tr>
</tbody>
</table>

Example: Sample Related Topics List component:

### RELATED TOPICS
- CAMPING
- BACKPACKING

SEE ALSO:
Which Components Can I Use with Each Template?
Report Chart

Use the Report Chart component to drag and drop reports you set up in your Salesforce org’s public folder to your community’s pages. 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: Only reports with a chart populate in the drop-down list in the report’s properties.

1. Select the Report Chart component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>Reports with charts, available for use in the community.</td>
</tr>
<tr>
<td>Filter By</td>
<td>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.</td>
</tr>
<tr>
<td>Refresh Time (Minutes)</td>
<td>The number of minutes between each report refresh.</td>
</tr>
<tr>
<td>Show report name</td>
<td>Adds the report name to the community page.</td>
</tr>
<tr>
<td>Show refresh button</td>
<td>Shows a refresh button, so users can refresh the chart.</td>
</tr>
</tbody>
</table>

Example: Report Chart component:

![Report Chart Example](image)

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.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Id</td>
<td>This field autopopulates with the record ID of the report.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for the reputation leaderboard. The default text is Leaderboard.</td>
</tr>
<tr>
<td>Number of Users</td>
<td>Enter the maximum number of users to display. You can display up to 10. The default is 5.</td>
</tr>
<tr>
<td>Show user rank</td>
<td>Displays the ranks of the users shown in the leaderboard.</td>
</tr>
</tbody>
</table>
| 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. |
## Details Property

**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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Username</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Eric</td>
<td>646</td>
</tr>
<tr>
<td>2.</td>
<td>Sylvia</td>
<td>332</td>
</tr>
<tr>
<td>3.</td>
<td>Sether</td>
<td>292</td>
</tr>
<tr>
<td>4.</td>
<td>Tahome</td>
<td>278</td>
</tr>
<tr>
<td>5.</td>
<td>Patricia</td>
<td>224</td>
</tr>
<tr>
<td></td>
<td>MSmith</td>
<td>142</td>
</tr>
</tbody>
</table>

#### Topics and Points

<table>
<thead>
<tr>
<th>Username</th>
<th>Topics</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eric</td>
<td>Camp &amp; Hike</td>
<td>646</td>
</tr>
<tr>
<td>Sylvia</td>
<td>Outdoor Packs</td>
<td>332</td>
</tr>
<tr>
<td>Sether</td>
<td>No recent topic activity</td>
<td>292</td>
</tr>
<tr>
<td>Tahome</td>
<td>Camp &amp; Hike</td>
<td>278</td>
</tr>
<tr>
<td>Patricia</td>
<td>Backpacking</td>
<td>224</td>
</tr>
</tbody>
</table>

#### Topics and Last Active

<table>
<thead>
<tr>
<th>Username</th>
<th>Topics</th>
<th>Last Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eric</td>
<td>Camp &amp; Hike</td>
<td>Active 8 hours ago</td>
</tr>
<tr>
<td>Sylvia</td>
<td>Outdoor Packs</td>
<td>Active 30+ days ago</td>
</tr>
<tr>
<td>Sether</td>
<td>No recent topic activity</td>
<td>Active 30+ days ago</td>
</tr>
<tr>
<td>Tahome</td>
<td>Camp &amp; Hike</td>
<td>Active 30+ days ago</td>
</tr>
<tr>
<td>Patricia</td>
<td>Backpacking</td>
<td>Active 30+ days ago</td>
</tr>
</tbody>
</table>

---

**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.

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:

![YouTube video](https://www.youtube.com/watch?v=DIG3c8Mu-MHM)

**SEE ALSO:**
- Find and Create Asset Files in Community Builder
- HTML Editor

**Scroll To**

Custom code on the Profile page in the Customer Service (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placeholder Text</td>
<td>Enter the text that appears in the search bar. The default value is <em>What would you like to know?</em></td>
</tr>
</tbody>
</table>
**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.
- **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:

![Sample Search component image]

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Autocomplete Search</strong></td>
<td>Click to expand the section with autocomplete search properties.</td>
</tr>
<tr>
<td><strong>Placeholder Text for Search Field</strong></td>
<td>Specify the text that appears in the search box. The default text is Search...</td>
</tr>
<tr>
<td><strong>Use autocomplete in searches</strong></td>
<td>Select this option to let users see suggested search results as they enter search terms.</td>
</tr>
<tr>
<td><strong>Show autocomplete results in one list</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Note:</strong> This option must be enabled if you want autocomplete search results that can be sorted by relevance.</td>
<td></td>
</tr>
<tr>
<td><strong>Maximum Autocomplete Results</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Show Discussions results before Articles</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Autocomplete Results: Sort by Relevance</strong></td>
<td>Click to expand the section that allows you to add searchable Salesforce objects to autocomplete results and have results sort by relevance.</td>
</tr>
<tr>
<td><strong>Objects in Autocomplete Results</strong></td>
<td>Click Add to add searchable Salesforce objects to your community’s autocomplete results.</td>
</tr>
<tr>
<td><strong>Autocomplete Results: Group by Object</strong></td>
<td>Click to expand the section with that allows you to set grouping by object for autocomplete results.</td>
</tr>
<tr>
<td><strong>All Results Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Article Results Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Discussion Results Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Ask Community</strong></td>
<td>Click to expand the section with properties regarding asking the community.</td>
</tr>
<tr>
<td><strong>Show footer during search</strong></td>
<td>Select this option to display the footer giving members an option to ask the community a question.</td>
</tr>
<tr>
<td>Property</td>
<td>Details</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Post to Ask the Community</td>
<td>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?</td>
</tr>
<tr>
<td>Create Your Question Prompt</td>
<td>Enter the text that users click to ask a question. The default text is: Ask a question.</td>
</tr>
<tr>
<td>Create Your Sign-In Prompt</td>
<td>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.</td>
</tr>
<tr>
<td>Post to Publisher</td>
<td>Click to expand the section with posting properties.</td>
</tr>
<tr>
<td>Discussion Publisher Title</td>
<td>Enter the title of the modal window that members use to post questions.</td>
</tr>
<tr>
<td>Select Navigational Topic Destination</td>
<td>Enter the text that lets users pick a navigational topic for their question. The default text is: Post to a navigational topic.</td>
</tr>
<tr>
<td>Post To Topic</td>
<td>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.</td>
</tr>
<tr>
<td>Topic Required Label</td>
<td>Enter the text that shows that selecting a topic is required.</td>
</tr>
<tr>
<td>Allow file attachments</td>
<td>Select this option to let users attach a file to a question.</td>
</tr>
<tr>
<td>Contact Support</td>
<td>Click to expand the section with properties regarding contacting support.</td>
</tr>
<tr>
<td>Let members contact support</td>
<td>Select this option to let users contact customer support to create a case.</td>
</tr>
<tr>
<td>Create Support Case Label</td>
<td>Enter the text to display for the option to create a case. The default text is Contact Support.</td>
</tr>
<tr>
<td>Create Private Support Case Label</td>
<td>Enter the text to display for the option to contact support in a private message. The default text is Private.</td>
</tr>
<tr>
<td>Case Action Name</td>
<td>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.</td>
</tr>
</tbody>
</table>
Example: Sample Search Publisher component:

![Sample Search Publisher component](image-url)

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 that are returned from selecting a topic or typing 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Articles Tab Label</strong></td>
<td>Enter the text that appears on the tab that users select to view the list of returned articles. The default text is <em>Articles</em>.</td>
</tr>
<tr>
<td><strong>Discussions Tab Label</strong></td>
<td>Enter the text that appears on the tab that users can select to view the list of returned discussions. The default text is <em>Discussions</em>.</td>
</tr>
<tr>
<td><strong>Topic ID</strong></td>
<td>The expression in the <strong>Topic ID</strong> field uses the topic ID that the user selects when filtering by topic.</td>
</tr>
<tr>
<td><strong>Search Term</strong></td>
<td>The expression returns results based on the text users enter when typing their search queries.</td>
</tr>
<tr>
<td><strong>Active Tab</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
### Components for Building Your Community

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type articles to display the article search results first or discussions to display the contents of the discussion search results first.</td>
<td></td>
</tr>
<tr>
<td>Number of Articles</td>
<td>Specify the maximum number of articles to display in the component.</td>
</tr>
<tr>
<td>Show Article Tab</td>
<td>Select this checkbox if you have Salesforce Knowledge enabled and want community members to search for and view articles.</td>
</tr>
</tbody>
</table>

**Important:** For articles to show up in the Search Results component, they must be associated with a topic.

**Example:** Sample Search Results component:

![Search Results Component Example](image)

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>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.</td>
</tr>
<tr>
<td>Active Status Label</td>
<td>Enter the text that appears on the button when the case is still open. For example, the button can be labeled <strong>Close Case</strong> or <strong>Resolve Case</strong>.</td>
</tr>
<tr>
<td>Inactive Status Label</td>
<td>Enter the text that appears on the button when the case is closed. For example, the button can be labeled <strong>Re-Open Case</strong>.</td>
</tr>
</tbody>
</table>

**Example:** Sample Set Case Status Button component:

![Sample Set Case Status Button component](image)

**SEE ALSO:**

Which Components Can I Use with Each Template?

### Snap-ins Chat

The Snap-ins Chat component allows users to request a chat with a support agent.

**Important:**

- Make sure to set up Live Agent and Snap-ins Chat before adding this component to your community pages. For help, see “Set Up Snap-ins Chat for Your Website” in the Salesforce help.
- Remove existing Live Agent buttons from the community pages where you want to use the Snap-ins Chat component. If you don’t remove Live Agent buttons, the component doesn’t work.

1. Select the Snap-ins Chat component in the page that you’re configuring.

2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat Deployment</td>
<td>Select a Snap-ins Chat deployment.</td>
</tr>
<tr>
<td>Display Chat Button</td>
<td>Display the chat button to users.</td>
</tr>
<tr>
<td>Button Label</td>
<td>Enter a label for the chat button. The user sees this before they start a chat. The default label is <em>Chat with an Expert</em>.</td>
</tr>
<tr>
<td>Offline Button Label</td>
<td>Enter a label for the chat button when there are no support agents available to chat. The default label is <em>Agent Offline</em>.</td>
</tr>
<tr>
<td>Chat Waiting Message</td>
<td>Enter a label for the chat button when a chat has been requested and is waiting for an agent. The default label is <em>Loading....</em>.</td>
</tr>
<tr>
<td>Chat Waiting Background Image URL</td>
<td>Enter a URL for an image to display in the chat window when a chat is waiting for an agent.</td>
</tr>
<tr>
<td>Agent Avatar Image URL</td>
<td>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.</td>
</tr>
<tr>
<td>Pre-Chat Background Image URL</td>
<td>Enter a URL for a banner image to display in the chat window while the user fills out the pre-chat form.</td>
</tr>
<tr>
<td>Company Logo URL</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stream ID</td>
<td>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, <code>{!recordId}</code>. 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.</td>
</tr>
</tbody>
</table>
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.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Name</td>
<td>Select an active survey.</td>
</tr>
</tbody>
</table>

**Example:** Sample Survey component:

![Survey component example](image)

Tabs

Use the Tabs component in the Customer Service (Napili) 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**.
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:** 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. We recommend images that are 125 pixels high and up to 340 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 ![up](arrow_up.png) 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 ![delete](arrow_delete.png)

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.
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:

![Top Articles by Topic component](image)

---

**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 (Napili) community template.

<table>
<thead>
<tr>
<th>Level</th>
<th>Maximum Number of Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>One (parent)</td>
<td>25</td>
</tr>
<tr>
<td>Two (subtopic)</td>
<td>10</td>
</tr>
<tr>
<td>Three (subtopic)</td>
<td>10</td>
</tr>
</tbody>
</table>

**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 (Napili) 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic ID</td>
<td>The system supplies this value, and populates the component with the description tied to the topic shown on the topic detail page.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter text for the title. The default text is Description.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Posts</td>
<td>Enable this setting to show the number of posts tagged with the topic.</td>
</tr>
<tr>
<td>Show Articles</td>
<td>Enable this setting to show the number of articles tagged with the topic.</td>
</tr>
<tr>
<td>Show Followers</td>
<td>Enable this setting to show the number of people following the topic.</td>
</tr>
<tr>
<td>Show how many people used the topic in the last 60 days.</td>
<td>Enable this setting to show how many community members have used the topic in the past 60 days.</td>
</tr>
</tbody>
</table>
Components for Building Your Community

Totals

The Totals component displays count summaries related to the Chatter 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic ID</td>
<td>This field populates dynamically with the topic ID.</td>
</tr>
</tbody>
</table>

Example:

<table>
<thead>
<tr>
<th>Summary</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>15</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Likes on Posts</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>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.</td>
</tr>
<tr>
<td>Number of Articles</td>
<td>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.</td>
</tr>
<tr>
<td>Property</td>
<td>Details</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 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:

 ![Sample Trending Articles component](image)

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter the text that is the title for the component. The default text is Trending Articles.</td>
</tr>
<tr>
<td>Number of Articles</td>
<td>Enter the maximum number of trending articles to display.</td>
</tr>
<tr>
<td>Topic ID</td>
<td>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.</td>
</tr>
</tbody>
</table>
**Example:** Sample Trending Articles by Topic component:

![Trending Articles Component](image)

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for the list of trending topics. The default text is Trending Topics.</td>
</tr>
<tr>
<td>Number of Topics</td>
<td>Enter the number of trending topics to display. You can display a maximum of five topics at a time.</td>
</tr>
</tbody>
</table>
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.

Note: Only questions created after the Spring ’17 release are displayed in the Unanswered Questions component.

1. Select the Unanswered Questions component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The title of the component. The default text is <em>Do you have the answer?</em>.</td>
</tr>
<tr>
<td>Number of Questions</td>
<td>Enter the number of questions to show on the list. The default is 5.</td>
</tr>
<tr>
<td>Show views</td>
<td>Show the number of times the question has been viewed by users.</td>
</tr>
</tbody>
</table>

User Profile

The User Profile component shows detailed information for a user, including 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 Knowledgeable About. You can also customize labels.

The layout of the component also 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 that includes four tabs: Feed, Cases, Details, and Related. The Cases tab is only visible when a user views 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 to use a different layout or want more granular control over the placement of user profile content, create a custom community page and use the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knowledgeable About, and User Profile Related List components.
1. Select the **User Profile** component in the page you’re configuring.

2. Select the Properties pane to view properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User ID</strong></td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
<tr>
<td><strong>Show Record Activity</strong></td>
<td>Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.</td>
</tr>
<tr>
<td><strong>Show Influence</strong></td>
<td>Determines if the user’s Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they’re following.</td>
</tr>
<tr>
<td><strong>Influence Label</strong></td>
<td>Enter a title for the Influence list. The default text is Influence.</td>
</tr>
<tr>
<td><strong>Show Knowledgeable About</strong></td>
<td>Determines if the Knowledgeable About list is shown.</td>
</tr>
<tr>
<td><strong>Knowledgeable About Label</strong></td>
<td>Enter a title for the Knowledgeable About list. The default text is Knowledgeable About.</td>
</tr>
<tr>
<td><strong>Maximum Topics in Knowledgeable About Displayed (up to 10)</strong></td>
<td>Enter the maximum number of topics listed for each user in the Knowledgeable About list, up to a limit of 10.</td>
</tr>
<tr>
<td><strong>Show Related Lists</strong></td>
<td>Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.</td>
</tr>
<tr>
<td><strong>Feed Tab Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Cases Tab Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Cases Tab Header Label</strong></td>
<td>Enter the text for the label that appears at the top of the list of cases. The default for this field is My Cases.</td>
</tr>
<tr>
<td><strong>Case Filter Name or ID</strong></td>
<td>Enter the name of the list view that displays cases.</td>
</tr>
<tr>
<td><strong>Create Case Label</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Record Details Tab Label (Mobile only)</strong></td>
<td>Determines if a tab appears for the record details. Record details include profile details, Knowledgeable About, and Influence. The tab label is Details. Available only when a community is viewed on a mobile device.</td>
</tr>
<tr>
<td><strong>Related Records Tab Label (Mobile only)</strong></td>
<td>Determines if a tab appears for related records, such as Groups, Files, Followers, and Following. The tab label is Related. Available only when a community is viewed on a mobile device.</td>
</tr>
</tbody>
</table>

**Example:** Sample User Profile component
**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.
To view properties for the component, select the Properties pane:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
<tr>
<td>Show Knowledgeable About</td>
<td>Determines if the Knowledgeable About list is shown.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a title for the component. The default text is Knowledgeable About.</td>
</tr>
<tr>
<td>Maximum Topics Displayed</td>
<td>Enter the maximum number of topics listed for each user, up to a limit of 10.</td>
</tr>
</tbody>
</table>

**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.

**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.
Components for Building Your Community

User Profile Knows About

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
</tbody>
</table>

Example: Sample User Profile Image component:

![Sample User Profile Image component](image)

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The user profile ID. Typically, this field is automatically populated with the record ID when the page loads.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a title for the component. The default text is Knows About.</td>
</tr>
<tr>
<td>Maximum Topics Displayed</td>
<td>Enter the maximum number of topics listed for each user, up to a limit of 10.</td>
</tr>
</tbody>
</table>

⚠️ **Note:** Community members can't opt out of being shown as knowledgeable about specific topics.

🔍 **Example:**

```
Knows About

This person knows about...

3 Camping
3 Bald
3 Running
3 Hiking
2 Backpacking
```

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value. Don’t update this field.</td>
</tr>
</tbody>
</table>

**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 is similar to the Profile Header component, but you can only use it with communities built with the Winter ’18 version and later of Lightning communities.

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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Filter Name or ID</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Note:</strong> 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.</td>
<td></td>
</tr>
<tr>
<td>Include Contact Support</td>
<td>Select to include the option to contact an agent from the profile.</td>
</tr>
<tr>
<td>Home Label</td>
<td>Enter the text shown for the link to the community home page from the user navigation menu. The default is Home.</td>
</tr>
<tr>
<td>Include My Messages</td>
<td>Show the number of unread messages in the menu.</td>
</tr>
<tr>
<td>My Profile Label</td>
<td>Enter the text shown to indicate a user’s profile. The default is My Profile.</td>
</tr>
<tr>
<td>Contact Support Label</td>
<td>Enter the text for the link to the page where the user can open a case. The default is Contact Support.</td>
</tr>
<tr>
<td>Login Label</td>
<td>Enter the text for the link to log in to the community. The default is Login.</td>
</tr>
<tr>
<td>Logout Label</td>
<td>Enter the text for the link to log out from the community. The default is Log Out.</td>
</tr>
<tr>
<td>Community Management</td>
<td>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.</td>
</tr>
<tr>
<td>Community Setup Label</td>
<td>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.</td>
</tr>
<tr>
<td>User Settings Label</td>
<td>Enter the text for the link to access an authenticated user’s personal settings for the community. The default is My Settings.</td>
</tr>
<tr>
<td>Show User Settings in Menu</td>
<td>Select this option to show user settings in the profile dropdown list.</td>
</tr>
</tbody>
</table>
User Profile Stats

The User Profile Stats component displays the user’s Chatter statistics for the community, including number of posts and comments, likes received, followers, and people they’re following.

A user’s statistics are visible to all members of the community, allowing members to see how active other members of the community are.

1. Select the **User Profile Stats** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value. Don’t update this field.</td>
</tr>
</tbody>
</table>
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:
<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
</tbody>
</table>

**Example:** Sample User Profile Summary component:

![Example Image](image-url)

**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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value so that authenticated users can view their own information. Don’t update this field.</td>
</tr>
</tbody>
</table>

**Example:** Sample User Profile Summary & Image component:

![User Profile Summary & Image component](image)

### 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value. Don’t update this field.</td>
</tr>
<tr>
<td><strong>Property</strong></td>
<td><strong>Details</strong></td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Feed Tab Label</td>
<td>Enter the text you want to display on the tab that users select to view a user’s Chatter feed. The default text is <em>Feed</em>.</td>
</tr>
<tr>
<td>Cases Tab Label</td>
<td>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 <em>Cases</em>.</td>
</tr>
<tr>
<td>Case Filter Name or ID</td>
<td>Enter the name of the list view that displays cases.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Header Title</td>
<td>Enter the text for the label that appears at the top of the list of cases. The default for this field is <em>My Cases</em>.</td>
</tr>
<tr>
<td>Create Case Label</td>
<td>Enter the text you’d like to display on the button that users can click to create a case. The default text is <em>Create Case</em>.</td>
</tr>
<tr>
<td>Show Record Activity</td>
<td>Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.</td>
</tr>
</tbody>
</table>

**Example:** Sample User Profile Tabs component:

![Sample User Profile Tabs component](image)

Case list viewed on a mobile device:
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 a user doesn’t want to receive email about events in the community, he or she 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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The system supplies this value. Don’t update this field.</td>
</tr>
</tbody>
</table>
Example: Sample User Settings component:

SEE ALSO:
Which Components Can I Use with Each Template?
Visualforce Page Component

Use the Visualforce Page component to add existing Visualforce pages to the pages of your Customer Service (Napili)-based community.

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.

Wave Dashboard

Use the Wave Dashboard component to add Wave Analytics to your community’s pages.

1. Select the Wave Dashboard component in the page you’re configuring.

2. In the property editor, configure properties for the component:
Details Property

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Select an available dashboard from the dropdown list.</td>
</tr>
<tr>
<td>Height</td>
<td>Specify the height of the dashboard, in pixels. The default is 300.</td>
</tr>
<tr>
<td>Show Sharing Icon</td>
<td>Add the Share icon on the dashboard. Users can click the icon to open the Share dialog, where they can post to Chatter and download images and data. Default is false.</td>
</tr>
<tr>
<td>Show Title</td>
<td>Control the visibility of the dashboard title. Default is true.</td>
</tr>
<tr>
<td>Open Links in New Windows</td>
<td>Specify where links from the dashboard to other assets are opened. Default is true.</td>
</tr>
<tr>
<td>Hide On Error</td>
<td>Control whether the Wave Analytics dashboard appears if there is an error, such as the dashboard can't be found. Default is false.</td>
</tr>
<tr>
<td>Filter</td>
<td>Add selections or filters to the embedded dashboard at runtime. You can filter dataset fields by variables or specified values. The filters are configured with JSON strings. For filtering on dimensions, use this syntax:</td>
</tr>
<tr>
<td></td>
<td>{ 'datasets' : [{'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2'], 'filter': {'operator': 'operator1', 'values': ['$value3', '$value4']}]}] }</td>
</tr>
<tr>
<td></td>
<td>For filtering on measures, use this syntax:</td>
</tr>
<tr>
<td></td>
<td>{ 'datasets' : [{'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2'], 'filter': {'operator': 'operator1', 'values': ['$value3']}}] }</td>
</tr>
</tbody>
</table>

**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. **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: = ; >= ; > ; <= ; <. Note: If a filter or selection can't be applied, the attribute is ignored and the dashboard appears with all its data and no selection.

**Example:** Wave Dashboard component:
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:

SEE ALSO:
Which Components Can I Use with Each Template?

Set Up the Content Block

The Content Block component lets you add text to a page so that you can provide instructions and information to users. For example, you can provide instructions for filling out a form or give a group of components a title.

1. In Site.com Studio, select the **Content Heading** or **Content Description** component in the page that you’re configuring.
2. Click ☰️.
3. Select **Edit HTML**.
4. Enter the text that you want to display on the page.
Example: Sample Content Block component with an introduction to a self-registration form:

Join the community to receive personalized information and customer support.

First Name

Last Name

Email

Sign Up

Already have an account?

or login with

SEE ALSO:
Which Components Can I Use with Each Template?

Custom Code

Use Custom Code components to send users to a specific page within your community.
The Custom Code component contains JavaScript navigation. Use this component to give users a link to go to another page. If you’re familiar with JavaScript, edit the existing code to provide other functionality. The Custom Code component provides simple navigation but can also be your way of adding JavaScript enhancements to your community.

1. In Site.com Studio, select the Custom Code component in the page you’re configuring.
2. Click ✎.
3. Select Edit.
   Edit the JavaScript code to change the navigation or behavior when the user clicks the component.
4. Click Save and Close.

Example: Sample Custom Code component as a Cancel button to direct users back to the main login screen if they decide not to reset their password:

![PASSWORD RESET](image)

SEE ALSO: Which Components Can I Use with Each Template?

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:
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:

![Employee Login Link component](image)

**Forgot Password**

Use the Forgot Password component to let users request a new password.

SEE ALSO:  
Which Components Can I Use with Each Template?
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Email URL</td>
<td>Enter the view or path to the page that notifies the user when the password has been reset and an email has been sent.</td>
</tr>
<tr>
<td>Username Label</td>
<td>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.</td>
</tr>
<tr>
<td>Submit Button Label</td>
<td>Enter the text for the button that the user clicks to make the password reset request.</td>
</tr>
</tbody>
</table>

**Example:** Sample Forgot Password component:

![Forgot Password component](image)

**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start URL</td>
<td>Enter the path to the page that users see after they log in successfully. This is the home page for the community.</td>
</tr>
<tr>
<td>Username Label</td>
<td>Enter the text for the username field label.</td>
</tr>
<tr>
<td>Password Label</td>
<td>Enter the text for the password field label.</td>
</tr>
<tr>
<td>Login Button Label</td>
<td>Enter the text for the button that the user clicks to submit the login request.</td>
</tr>
<tr>
<td>Forgot Password Link Label</td>
<td>Enter the text for the link to the page where users can request a password reset.</td>
</tr>
<tr>
<td>Forgot Password URL</td>
<td>Enter the page where users can request a password reset.</td>
</tr>
<tr>
<td>Self Register Link Label</td>
<td>Enter the text for the link to the page where users can complete a self-registration form.</td>
</tr>
<tr>
<td>Self Register URL</td>
<td>Enter the page where users can complete a self-registration form.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account ID</td>
<td>Enter the variable expression for the account ID to associate with new users.</td>
</tr>
<tr>
<td>Start URL</td>
<td>Enter the path to the page that users see after they log in. This page is the home page for the community.</td>
</tr>
<tr>
<td>Registration Confirmation URL</td>
<td>Enter the path to the page to display after the user submits the self-registration form.</td>
</tr>
<tr>
<td>First Name Label</td>
<td>Enter the label text for the user’s first name.</td>
</tr>
<tr>
<td>Last Name Label</td>
<td>Enter the label text for the user’s last name.</td>
</tr>
<tr>
<td>Email Label</td>
<td>Enter the label text for the user’s email address.</td>
</tr>
<tr>
<td>Password Label</td>
<td>Enter the text for the password field label.</td>
</tr>
<tr>
<td>Confirm Password Label</td>
<td>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.</td>
</tr>
<tr>
<td>Submit Button Label</td>
<td>Enter the text for the button to submit the form values.</td>
</tr>
<tr>
<td>Include Password Field?</td>
<td>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.</td>
</tr>
<tr>
<td>Extra Fields Field Set Name</td>
<td>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.</td>
</tr>
</tbody>
</table>
**Example:** Sample Self-Registration component:

![Sample Self-Registration component](image)

---

**SEE ALSO:**

Which Components Can I Use with Each Template?

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**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:

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Header</td>
<td>Select this option to show a text header above the authentication header icons.</td>
</tr>
<tr>
<td>Header Text</td>
<td>Enter the text for the header text.</td>
</tr>
</tbody>
</table>
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?
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