Build Your Own Self-Service Community

Salesforce, Spring '15

@salesforcedocs

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WHAT YOU NEED TO GET STARTED

This guide is designed to use with Salesforce Developer, Enterprise, Unlimited, or Performance Editions that are using Winter '14 releases and beyond. Contact Salesforce to ensure that you that have the correct user and feature licenses to set up and administer Cases, Customer Communities, Salesforce Knowledge, Chatter Answers, and Ideas.

The Customer Community license is similar to the High Volume Customer Portal license and is well-suited for business-to-consumer communities with large numbers of external users.

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 discover that you can't access a feature, make sure that you've got the correct licenses and permissions to administer that feature.

BUILD A SELF-SERVICE COMMUNITY IN NO TIME AT ALL!

This guide shows you how to set up a Salesforce Community that uses the power of the Service Cloud to support your customers.

Using the Service Cloud on top of Salesforce Communities allows customers to answer one another's questions directly—reducing service calls while building a rich repository of product knowledge. Customer Communities is the Salesforce Communities license that makes it easy to engage your customers on a customized, branded website where they can get product help, engage experts within your community, share ideas, get product updates, and directly work on business processes. This type of community helps increase brand loyalty, reduce support costs, and increase customer satisfaction. It also gives your customers a voice.

This guide is based on the following scenario:

WorldWide Computing has been using a Customer Portal for several years and has decided to take advantage of the exciting new world of Salesforce Communities. They want to extend their branding and increase collaboration. They want to be able to listen to and respond to their customers when they have questions or ideas from multiple channels.

We've been asked to set up a community that focuses on self-service so that customers can find answers to their questions without engaging a service agent. In the future, they'll add other communities for their premium, high-touch customers and for partners. They want their customers to experience the following things in their new self-service community:

- Branded presence for customers including branded self-registration and login pages
- A collaborative environment where customers can share experiences and information with each other
- Self-service access to information and knowledge articles organized by product categories
- Product-focused forums for members to post questions and get rapid responses from community experts or other customers
- Global search within the community
- Customizable emails so that branding is extended to email sent out when posts are commented on, when new members are welcomed to the community, and when users have trouble with passwords.
- Member profiles where customers can manage their own profiles and contact information
- Community access from a mobile device with the same experience as a desktop user

Our goal is to set up a community for WorldWides's Educational Games product line that has distinct zones for three of their biggest games: Around the World, Math Magic, and Spelling Challenge. We'll set up Chatter Answers, Ideas, Cases, and Salesforce Knowledge to give the community a powerful platform for deflecting cases and for collaborating with customers. We'll also extend the company branding themes to the pages of the community as well as any email correspondence that comes from the community.

As you go through the steps in this guide, you can enter the exact information presented in each step and create a fictitious community for WorldWide Computing. Or, you can enter information specific to your company and set up your own self-service community. The choice is entirely yours!

Either way, when we're finished we'll have a working community with everything we need to keep our customers engaged and happy. So let's get going!

Beyond the Basics

Some topics include a "Beyond the Basics" section that highlights interesting "extra" information about setting up a service community. To find out more about these topics, check out the Salesforce online help.

DELIVER OUTSTANDING CUSTOMER SERVICE WITH COMMUNITIES

A self-service community provides the following tools to give your customers a phenomenal experience:

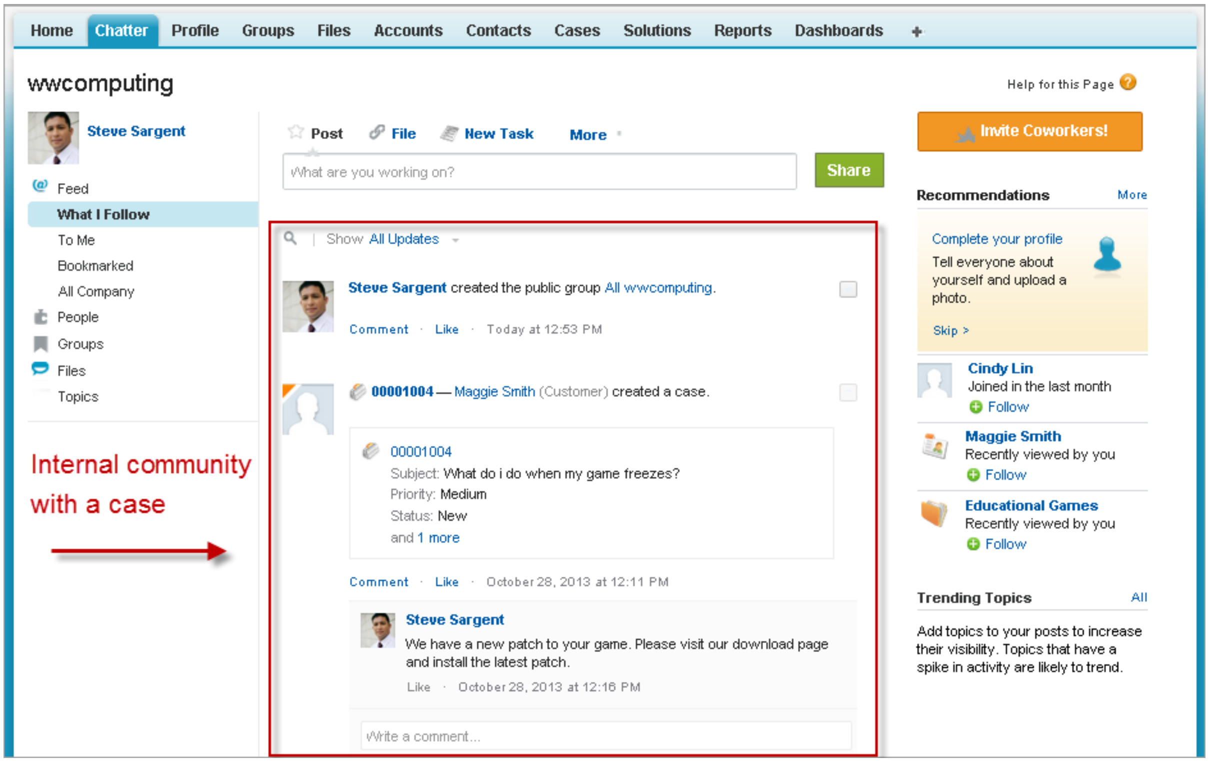
- Salesforce Knowledge lets members search knowledge articles and find solutions without having to engage your support agents.
- Ideas provides a forum for ideation and discussion, allowing your customers to tell you what they'd like to see in future products.
- Idea Themes gives you a way to engage the creativity of your customers by creating contests and idea challenges.
- Chatter Answers provides effective Q&A for self-service use cases.
- Reputation measures a member's participation in the community.
- Moderation allows communities to adhere to rules and standards.

Decide on a Community Strategy

Determining what types of communities you'll create is one of the first decisions you'll need to make. WorldWide Computing wants a customer community for self-service and, in the future, they want a private, premier community for customers who require extra service and attention. They also want to have an internal community for employees to use for collaboration. Employees inside the company can choose where they collaborate—with fellow employees inside Chatter, or with selected customers in a branded, external community.

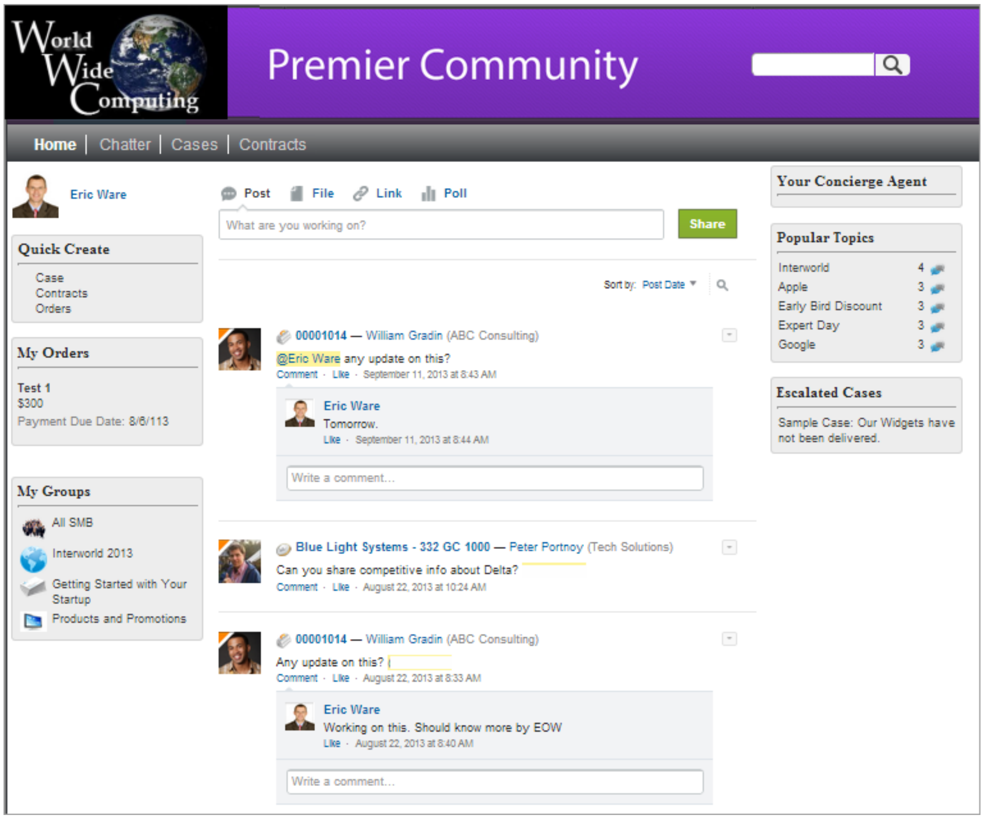
Internal Communities for Employee Collaboration and Case Resolution

An internal community is created automatically when you enable Salesforce Communities, and it can transform the way your employees work together. If you're looking to help your internal users collaborate and answer questions, then you can plan an internal-only community. For example, you might want to set up an internal community for employees about employee benefits. This is where your employees can collaborate on internal initiatives or agents can manage customer cases. Since an internal community exists within your Salesforce organization, internal communities require that members are registered and signed in to Salesforce.



Private Communities for Your Premier Customers

If you want a place for customers and agents or other employees to collaborate with each other, but you want most or all of that experience and information to be behind a login, then you should plan for an authenticated, private community. WorldWide Computing wants to have an exclusive community for its premier customers. In this community, premier customers can interact with each other and your agents can provide special promotions and upselling opportunities.

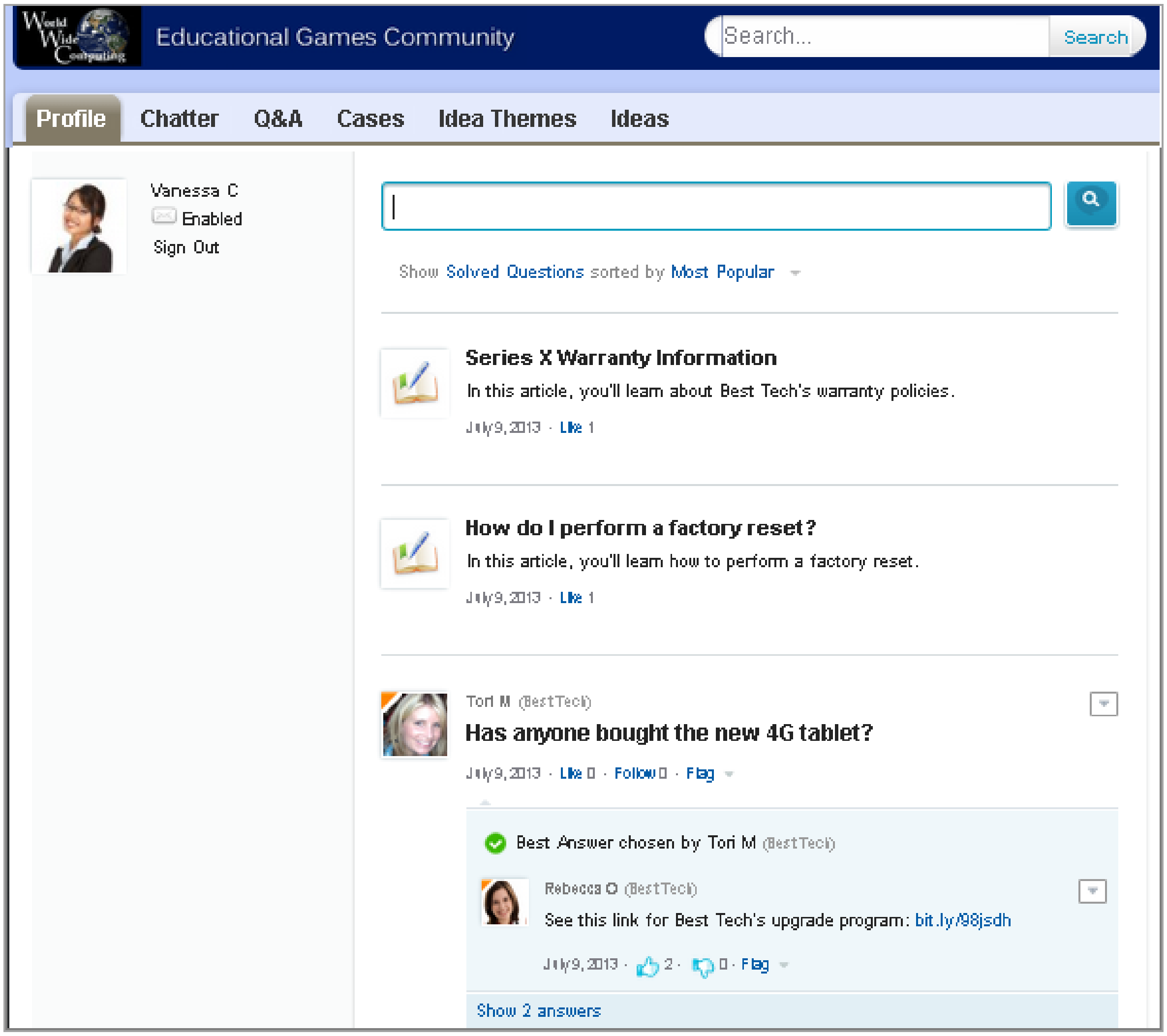


Public Self-Service Communities

Self-service communities offer a ton of great ways to enable your customers to engage with one another and solve problems. Through service communities, you can set up official support channels to handle customer cases as well as self-support channels so your customers can find answers or get help from the community. And it all sits on the powerful Salesforce platform to manage your internal business processes and data. You can set up Cases, Live Agent, Knowledge, Chatter Answers, and Ideas to provide a support community for your customers.

Public communities give you the option to:

- Create multiple communities that contain different zones, with each zone having its own focus and questions
- Brand and customize communities
- Give agents the opportunity to respond to customers publicly or privately
- Automate the creation of cases from questions using an Apex trigger and workflow rules
- Deflect customer inquiries through crowd-sourced answers coming from community members
- Encourage participation by publicly displaying user statistics
- Moderate questions and answers from the Q&A tab in the internal Salesforce application or from the community


Educational Games Community
Search...
Search
Profile
Chatter
Q&A
Cases
Idea Themes
Ideas
Vanessa C
Enabled
Sign Out
Show Solved Questions sorted by Most Popular
Series X Warranty Information
In this article, you'll learn about Best Tech's warranty policies.
July 9, 2013 · Like 1
How do I perform a factory reset?
In this article, you'll learn how to perform a factory reset.
July 9, 2013 · Like 1
Tori M (BestTech)
Has anyone bought the new 4G tablet?
July 9, 2013 · Like 0 · Follow 0 · Flag
Best Answer chosen by Tori M (BestTech)
Rebecca O (BestTech)
See this link for Best Tech's upgrade program: bit.ly/98jsdh
July 9, 2013 · 2 · 0 · Flag
Show 2 answers

BEFORE WE DIVE IN

Permissions You'll Need to Set Up a Self-Service Community

USER PERMISSIONS	
To create accounts:	"Create" on Accounts
To create contacts:	"Create" on Contacts
To create, customize, or publish a community:	"Create and Set Up Communities"
To enable Communities, Chatter Answers, Ideas, and Salesforce Knowledge:	"Customize Application"
To create or edit users:	"Manage Internal Users"
To create article types and article actions:	"Manage Salesforce Knowledge"
To upload branding images and email templates:	"Create" on Documents
To create data categories:	"Manage Data Categories"

You won't get very far without the right permissions, so let's make sure that we've got access to all the moving parts of Salesforce.

These are the permissions you'll need to be able to set up a basic Self-Service Community with Cases, Chatter Answers, Ideas, and Salesforce Knowledge. Your administrator can grant you these permissions before you get started.

Upload Branding Images and Template Files

One of the great things about Salesforce Communities is how easy it is to extend your existing branding to the community. This means that your customers will recognize the community as an extension of your official website and know that they're in a trusted area where they can post questions and ideas and get help with cases.

To save ourselves a few steps later, we'll upload our branding and email template files now so that they're available for us when we need them. These might be files that your company's art department creates, and you'll need to have access to them on your computer.

You'll need to upload files for the following places in your community:

- A logo for the community landing page
- An email header file for messages sent to community members
- An email footer file for messages sent to community members

The maximum file size for .html files is 100 KB combined. So, if we have a header .html file that is 70 KB and we'll want to use an .html file for the footer as well, it can only be 30 KB.

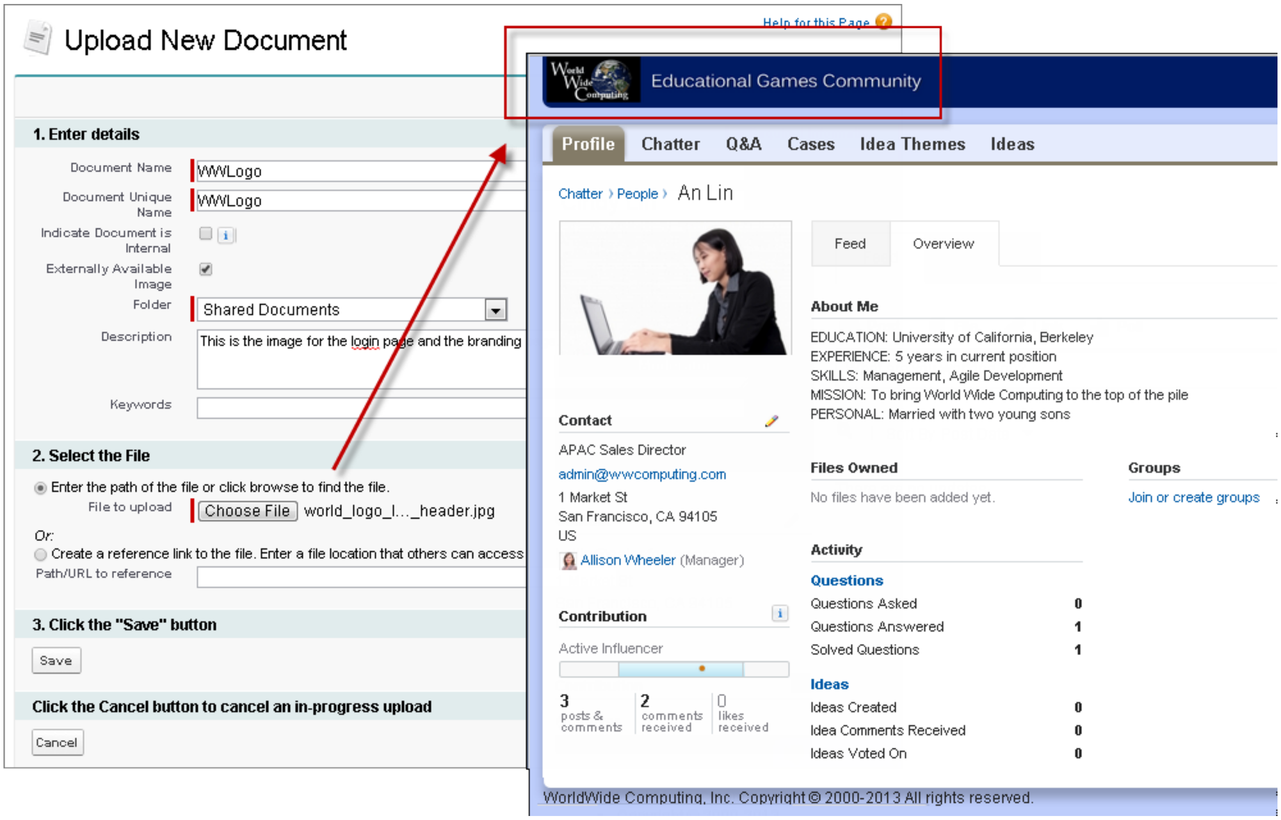
Let's upload the logo that we want to use for the landing page first.

1. Log into Salesforce.
2. From the Documents tab, click **New Document** or **New** next to **Recent Documents**. If you don't see the Documents tab, click the plus icon that appears to the right of your current tabs. The All Tabs page appears and you can select the Documents tab.
3. On the Upload New Document page, specify a descriptive `Document Name`. We'll use *`WWLogo`* so that we can distinguish this file as the logo file for our community.
4. Enter *`WWLogo`* as the unique name for the document. This is the name that the API uses internally.
5. Skip `Indicate Document is Internal` because we want this to be available externally.
6. Select `Externally Available Image` so that the image can be seen without requiring a login.
7. Select a destination folder such as the `Shared Documents` or other folder that you have access to.
8. Enter a description and some helpful keywords that help you search for documents and files. We'll use *`This is the landing page logo`* for the description and *`Landing page logo`* for the keywords.
9. Select the option to enter the path of the file and click **Choose File**.
10. Choose the image file that you have on your computer, and click **Open**.
11. Click **Save**.
12. Navigate back to the Documents home page and repeat these steps for the email header and footer files.

USER PERMISSIONS

File Type	Requirements
Image used for landing page	• Size: 250 by 125 pixels (Maximum image size is 100 KB)
Email header file	• .html, .gif, .jpg, or .png (Maximum image size is 20 KB)
Email footer file	• .html

Example: Good work! Having these files already available on the Documents tab will make it quick and easy to set up some of the branding options later in the setup.



Switch on Salesforce Communities

The first step in setting up your community is to flip the switch to enable Salesforce Communities. Since many of the Service Cloud features that we'll be setting up need to have Salesforce Communities already switched on, we'll take care of enabling Communities now and come back later to set up the details of our community.

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

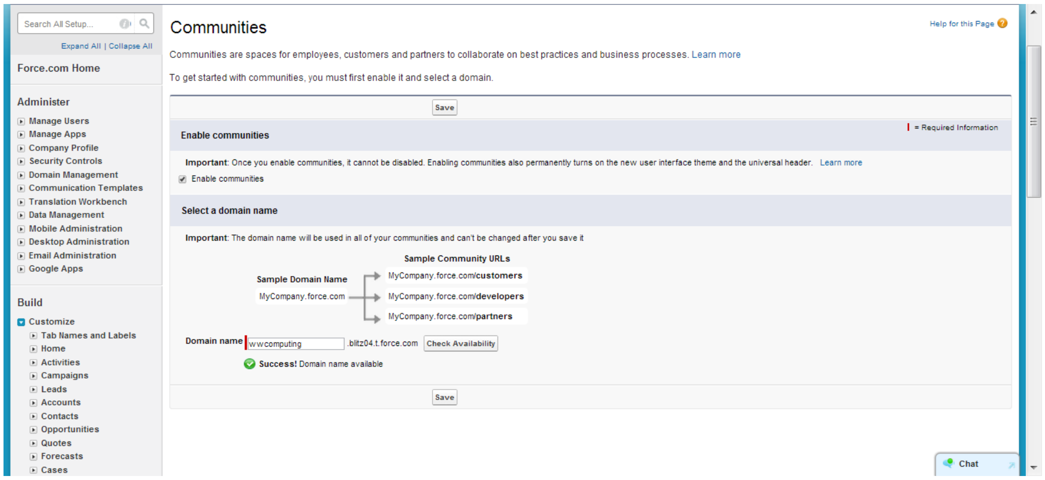
1. From Setup, click **Customize** > **Communities** > **Settings**.
2. Select **Enable Communities**.
3. Next, we'll enter a unique value to be used as our domain name and click **Check Availability** to make sure it's not already being used by someone else.

   Remember that we are creating a fictitious company's community in this guide. You want to enter your own unique value here rather than using WorldWide Computing. 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. WorldWide Computing's domain is `WWComp.force.com` and since they are creating a customer service community, the URL is `WWComp.force.com/customers`.

   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.

Example: We'll come back to Communities after we've set up the Service Cloud features that will power our community. Let's move on and finish up some of the other setup tasks like creating an account to associate with community user contact records.



Beyond the Basics

You can add partners to communities so that your company can collaborate with them as easily as they work with internal teams on things like leads, opportunities, and deals. When you purchase licenses for Partner Communities, you set the number of partner roles and grant select partners superuser access to some records and data.

Create Accounts and Contacts

Account and contact records are how Salesforce help you keep track of your customers. When a customer record is created—either manually by you or automatically when a customer self-registers—a contact record is created and associated with an account.

We'll set up an Educational Games account that we can associate with contact records that come in from the Educational Games community. That way, WorldWide Computing can create contact records when customers join the community. It's really simple, and we'll be finished in a few short steps!

1. Navigate to the Accounts tab and click **New**.
2. Type `Educational Games` for the name of the account.
3. Optionally, enter any additional details you want to include for the account.
4. Click **Save**.

Example: Our account is finished and ready to associate with customers later in the setup process. Let's move on and set up our Service Cloud features!

Beyond the Basics

A best practice for managing accounts that are related to your community is to enable Person Accounts in your organization. A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveler. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model. You can find more information about using Person Accounts to manage your new users in the Salesforce Help.

CREATE AN AWESOME SELF-SERVICE EXPERIENCE

Set Up Your Service Cloud Features

Think of Cases, Chatter Answers, Ideas, and Salesforce Knowledge as the platform on which you'll build a thriving community where your customers go when they have a question or when they want to make a suggestion—before they call your support agents. Salesforce Communities easily integrates with Service Cloud features so that you can get up and running with your self-service community quickly.

So before we go any further, we'll need to have Service Cloud features configured so that later on we can select tabs for them to display in the community.

WorldWide Computing will create the community around the following Service Cloud products:

Cases

Every support request is an opportunity to enhance your relationship with your customers or generate additional revenue. Case management enables you to make the most of each interaction and become a true champion of customer success.

Chatter Answers

Answering your customers' questions is critical to maintaining your company reputation. A lot of customers—and potential customers—look to the Web to find answers to questions about products and services or to connect with others who can help them find the information that they need. With Chatter Answers, you can strengthen your brand by increasing your service and support presence online.

Salesforce Knowledge

Salesforce Knowledge is a knowledge base where customers can search for and find the information that they need when they want it. You can continually create, review, deliver, analyze, and improve the knowledge base you provide your customers. Your agents get smarter, your customers get better service, and your costs go down.

Ideas

Ideas is a forum where members can post, vote for, and comment on ideas. Consider it an online suggestion box that includes discussions and popularity rankings for any subject. Using Ideas in your community provides an online, transparent way for you to attract, manage, and showcase innovation. We'll also enable Idea Themes so that we can create a contest and ask our members to suggest a new product.

Okay! Let's set up the features that solve service requests faster and let customers help each other, access your knowledge base, and get help from an agent when needed.

Set Up Chatter Answers

Communities offer a ton of great ways to enable your customers to engage with one another and solve problems. Chatter Answers is one of many Service Cloud tools you can use to enable your customers to help each other. Let's enable Chatter Answers so that we can set up the Q&A tab for our community.

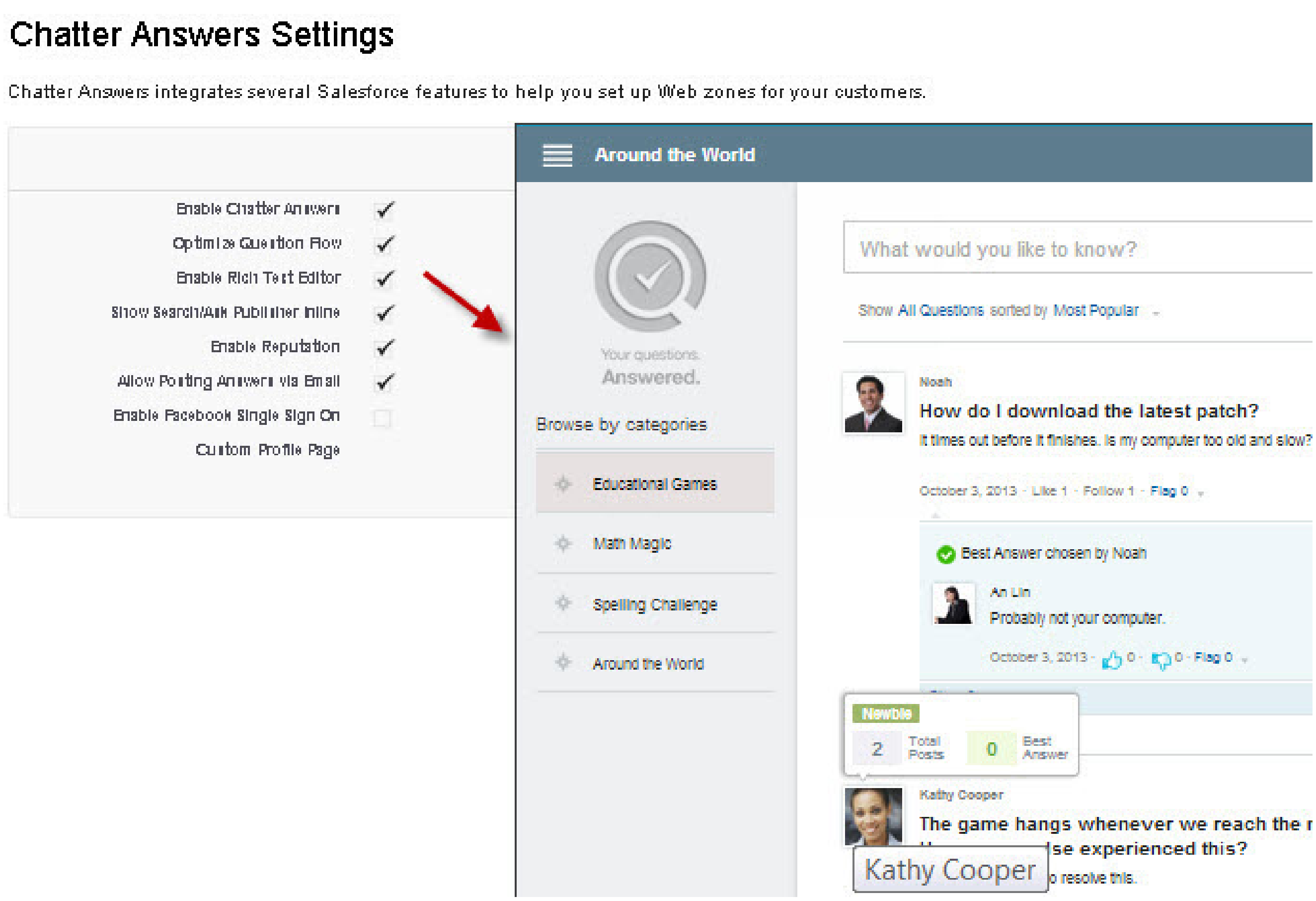
Note: Depending on your license type, some of these options may already be enabled. Lucky you! If that's the case, then just move on to the next step!

1. From Setup, click **Customize** > **Chatter Answers** > **Settings**.
2. Click **Edit**.
3. Select `Enable Chatter Answers`.

4. Select `Optimize Question Flow` to let users filter search results by articles or questions before they post a question to any of the zones in the community. This also adds the `Title` and `Body` fields to questions for easier text input and scanning.
5. Select `Enable Rich Text Editor` to let members use the rich text editor to format text and upload images when posting questions and replies.
6. Select `Show Search/Ask Publisher Inline` to embed the Search/Ask Publisher inline instead of using a pop-up window. The Search/Ask Publisher appears at the top of the Q&A tab and is where community members type their questions.
7. Select `Enable Reputation` to let users earn points and ratings that display as hover text on their profile pictures. Reputation is enabled across all zones.
8. Select `Allow Posting Answers via Email` to let users post answers by replying to email notifications.
9. Skip the steps to select `Enable Facebook Single Sign On` and `Custom Profile Page`.

   WorldWide Computing will be setting up Facebook single sign-on and custom profile pages in the future.
10. Click **Save**.

Example: Okay, now that we've enabled Chatter Answers, let's move on to enabling innovation with Ideas!



Beyond the Basics

Instead of requiring users to self-register and log into the Salesforce Community to post and answer questions, you can encourage participation by letting users sign in with Facebook. When a user signs in to Chatter Answers with Facebook, the first name, last name, and the photo associated with the Facebook account is used in posts to your zone. Before you can enable this feature, you must define a Facebook authentication provider in your organization's security controls. Learn more about letting users sign in with Facebook in the Salesforce Help.

Set Up Ideas

Your customers have great ideas! Let your members suggest new features, vote, and comment on other ideas in the community. Ideas provides an online, transparent way for you to attract, manage, and showcase innovation. WorldWide Computing is really excited to get input on a new line of games and can't wait to see what ideas their customers have.

But before anyone can use Ideas, we need to specify a few settings.

Note: Depending on your license type, some of these options may already be enabled. Lucky you! If that's the case, then just move on to the next step!

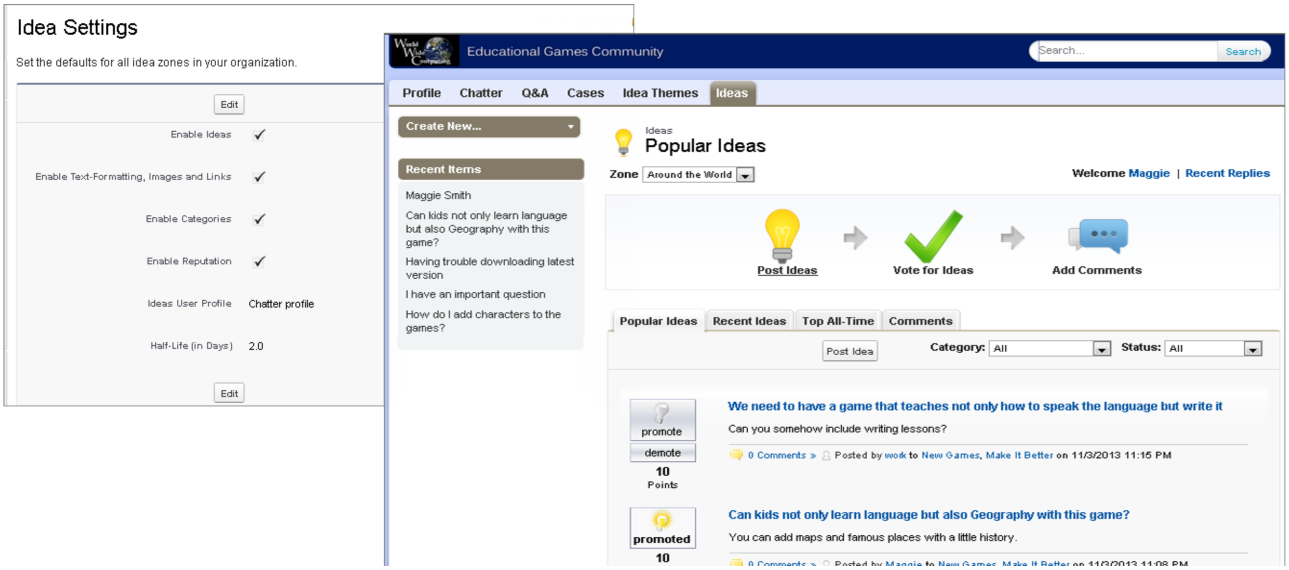
1. From Setup, click **Customize** > **Ideas** > **Settings**.
2. Click **Edit**.
3. Select the `Enable Ideas` checkbox.
4. Select `Enable Text-Formatting, Images and Links` to enable the Ideas HTML editor, which gives users HTML editing and image referencing capabilities when they post or comment on ideas.
5. Make sure that the `Enable Categories` field is selected. This button isn't displayed if your organization already has the `Categories` field enabled.

   We want to enable Categories so that community members can associate more than one category with an idea.
6. Select `Enable Reputation` so that users earn points and ratings based on their activity in each zone.
7. Select the `Chatter profile` type to use for the profile page in the zone.

   The user's Chatter profile is the default user profile type. If you select this option and a user doesn't have a Chatter profile, then the Ideas zone profile is used. This is a different profile than the Self-Service Communities User profile that we'll set up to create user access to the community.
8. In the `Half-Life (in Days)` field, enter *5*.

   The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.
9. Click **Save**.

Example: Now that we've enabled Ideas, let's get Idea Themes up and running so that we can create contests and idea challenges in our community.



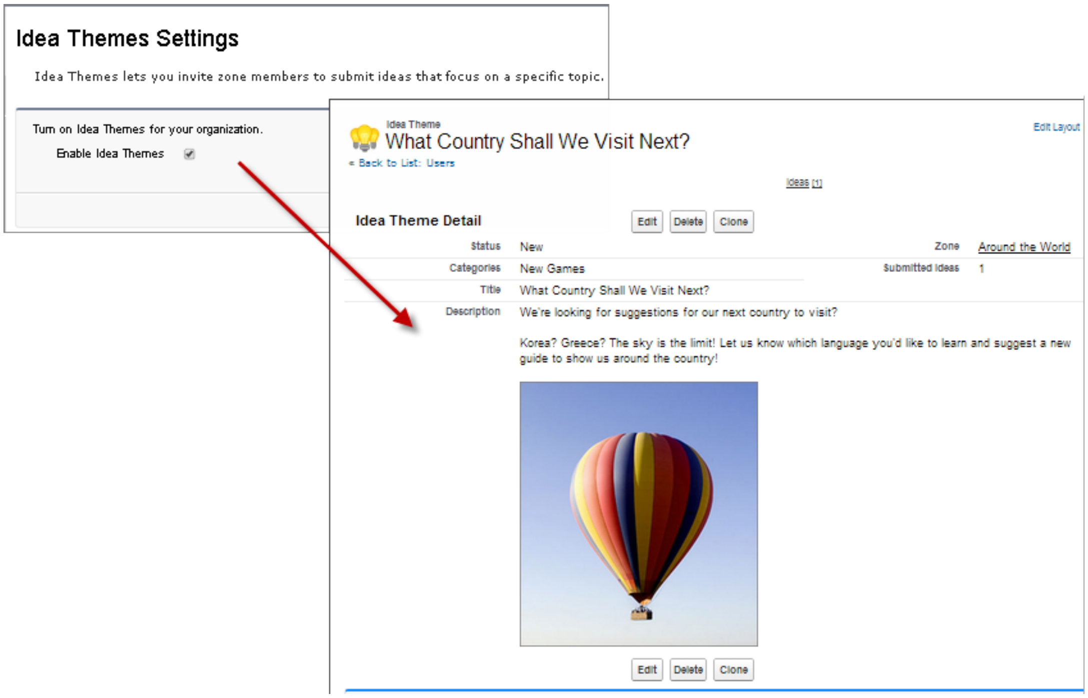
Leverage the Creativity of Your Community with Idea Themes

Idea Themes lets you invite community members to participate in contests or idea challenges around specific topics. WorldWide Computing wants to create excitement around the launch of one of their new educational games and will ask members to work together to create the product's name. Community members will collaborate and add ideas to the idea theme, while the community manager monitors their activities as they vote and comment on each other's ideas until they find a winner.

When you create an Idea Theme, you can add pictures, videos, and other multimedia content to showcase or explain the idea that you're presenting to the community. You can also view and manage the list of ideas that have been posted to the idea theme.

1. From Setup, click **Customize** > **Ideas** > **Idea Themes** > **Settings**.
2. Click **Edit**.
3. Select `Enable Idea Themes`.
4. Click **Save**.

Example: We'll create a contest to solicit ideas for a new educational game later on in the process. But, for now, we need to keep setting up our Service Cloud features.



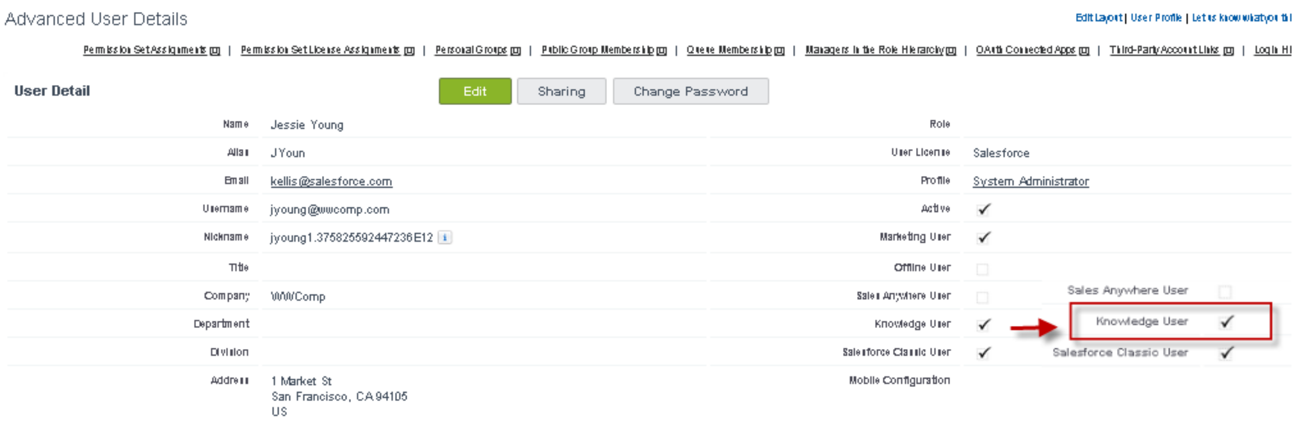
Set Up Salesforce Knowledge

Get the right information to your customers with Salesforce Knowledge. Knowledge articles provide essential information that your agents and customers can find quickly and easily from within your community. From searching for and viewing a product FAQ, to watching a video on how to troubleshoot a product, knowledge articles provide accurate information to your customers wherever they are and whenever they need it.

Before we can set up all of the great features of Salesforce Knowledge, we have to make sure that we're a Salesforce Knowledge user.

1. At the top of any Salesforce page, click the down arrow next to your name, and select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select either of the following:
   - If you clicked **Setup**, select **Personal Setup** > **My Personal Information** > **Personal Information**.
   - If you clicked **My Settings**, select **Personal** > **Advanced User Details**.
3. Click **Edit**.
4. Select `Knowledge User`.
5. Click **Save**.

Example: Let's dive in and get started setting up Salesforce Knowledge!



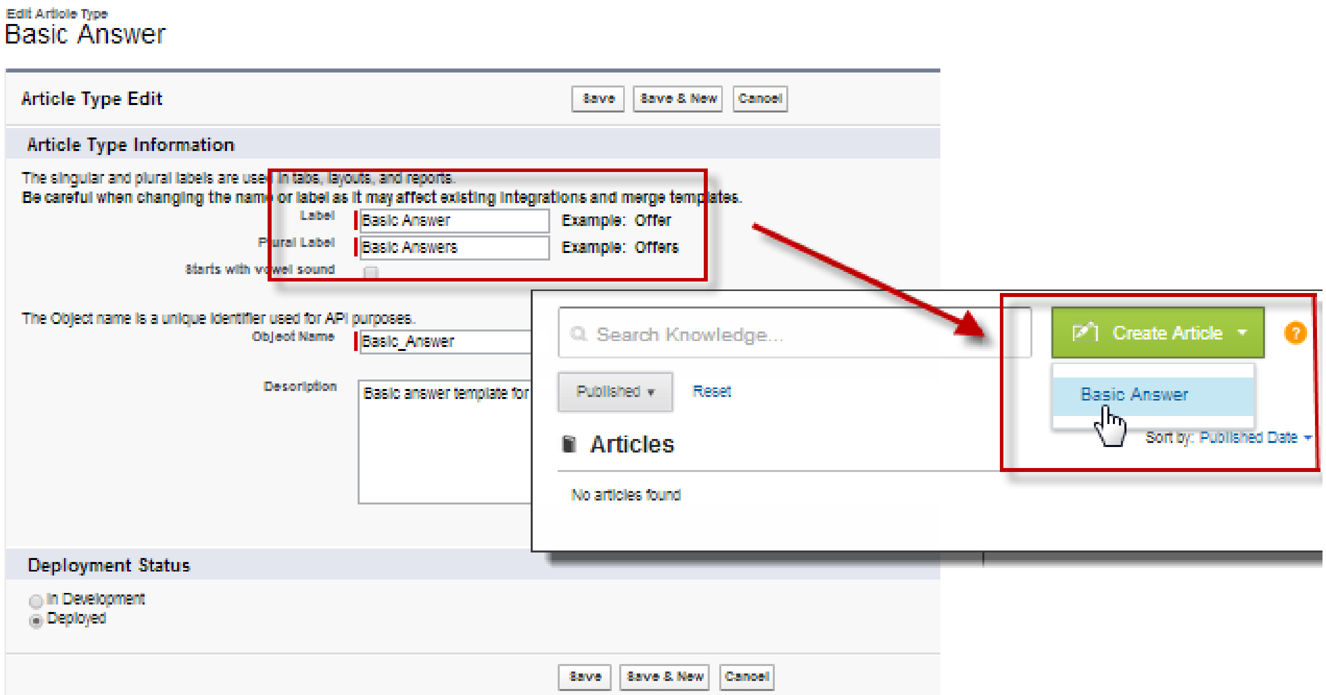
Create an Article Type

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.

We'll create a "Basic Article" article type, to provide the format and structure that controls how the article appears.

1. From Setup, click **Customize** > **Knowledge** > **Article Types**.
2. Click **New Article Type**.
3. Type `Basic Article` for the label of the article type.
4. Type `Basic Articles` as the plural name of the object. If you create a tab for this object, this name is used for the tab.
5. Skip `Starts with a vowel sound`, since the article type we're creating starts with a consonant.
6. Type `Basic_Article` for the API name of 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**.

Example: Nice! We have our first article type. In the next step, we'll add a custom field that lets authors add formatting, videos, and links to the article.



Beyond the Basics

You can create a knowledge base that lets some agents write drafts of articles while others rewrite, translate, and approve articles. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

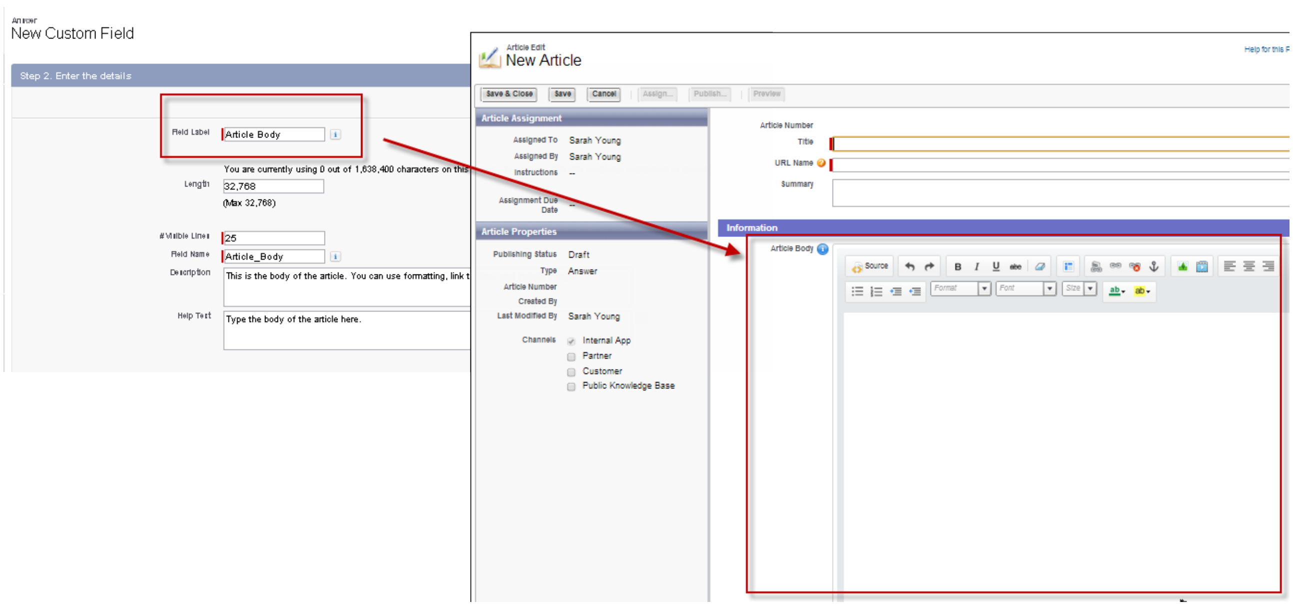
Enable Formatting, Images, Links, and Videos in Articles

Since the only standard fields provided by default on article types are `Article Number`, `Summary`, `Title`, and `URL Name`, we want to add a field where authors can create the body of the article. WorldWide Computing wants their service agents to be able to enter text with formatting as well as add images, videos, and links, so we'll add a rich text editor to the article type.

1. From Setup, click **Customize** > **Knowledge** > **Article Types**.
2. Click the `Basic Article` 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. At a minimum, WorldWide Computing wants the field visible to everyone, but have the article body to be read-only for Customer Community User. That way, community members can't make changes to articles.
   a. Select `Visible` for all of the profiles listed who will be using the community and viewing articles.
   b. Select `Read-Only` for the Customer Community User profile 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: We've just added a ton of helpful options to articles in our knowledge base. WorldWide Computing can create any number new article types in the future to present new types of information to the community. But, for now, we have enough to move on and set up a very basic knowledge base.



Enable Salesforce Knowledge in Your Community

Now that we've set up the articles that our members and agents can use to solve issues and close cases, we'll turn on Salesforce Knowledge and configure it so that our service agents can create knowledge articles quickly and easily!

1. From Setup, click **Customize** > **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. Click **Edit** to select your general settings.
   a. Select `Allow users to create and edit articles from the Articles tab` to enable agents and internal users to edit articles without going to the Article Management tab. Users with permission can click **Edit** an article to open the article edit page. If a published version of the article already exists, they have the option to view the published version or edit the current version. If a draft version exists, they can continue with editing the existing draft, but should carefully review the draft so that they don't overwrite unpublished changes.
   b. Select `Activate Validation Status field` to add a Validation Status field to all articles.

      This way, agents can attach approved articles to questions instead of ones that haven't gone through an approval process.

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

3. Select `Internal App` and `Customer` to show article summaries to customers and internal community members in the article list view.
4. Choose `English` as the **Default Knowledge Base Language**. This is the language your authors will use to write most of the articles. We recommend that your default knowledge base language and your organization's language be the same.

   Note: Current multi-language users that use additional languages can still use Communities. The Salesforce Help provides more details on multi-language organizations.

5. Select **Single Language**.
6. Select `Allow users to create an article from a case` to let agents create a draft article that is attached to the case.
7. Select the option to let agents use the standard editor when they create articles. This lets them add links, formatting, and videos to articles.
8. Select `Basic Article` as the default article type.
9. Skip 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 lets agents turn a particularly helpful answer into an article.

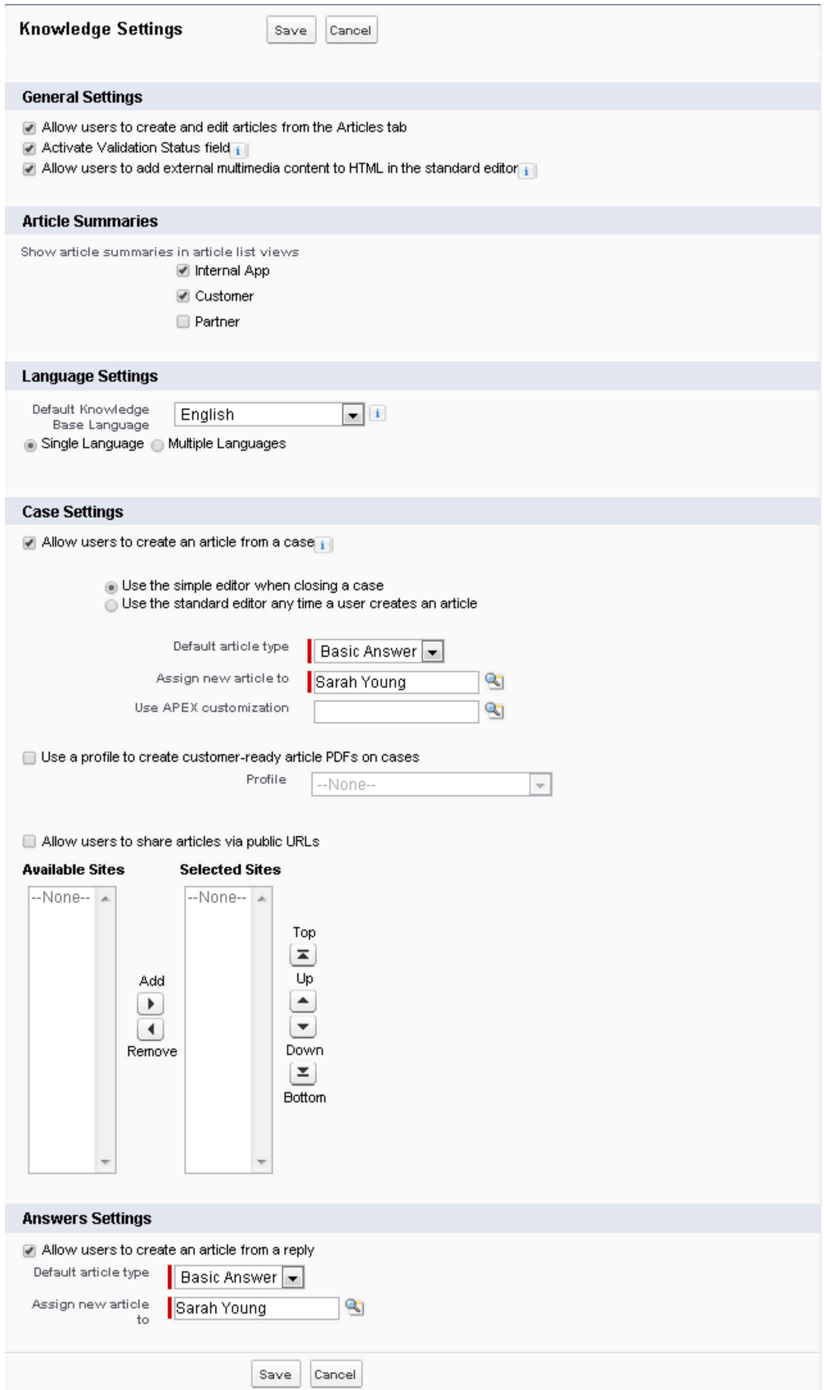
    a. Select `Basic Article` as the article type.

    b. Select an internal user to assign the article to so that it can be evaluated for accuracy.

       If you're setting up in a brand new org without users, you'll have to select yourself for now and come back later to assign a different user.

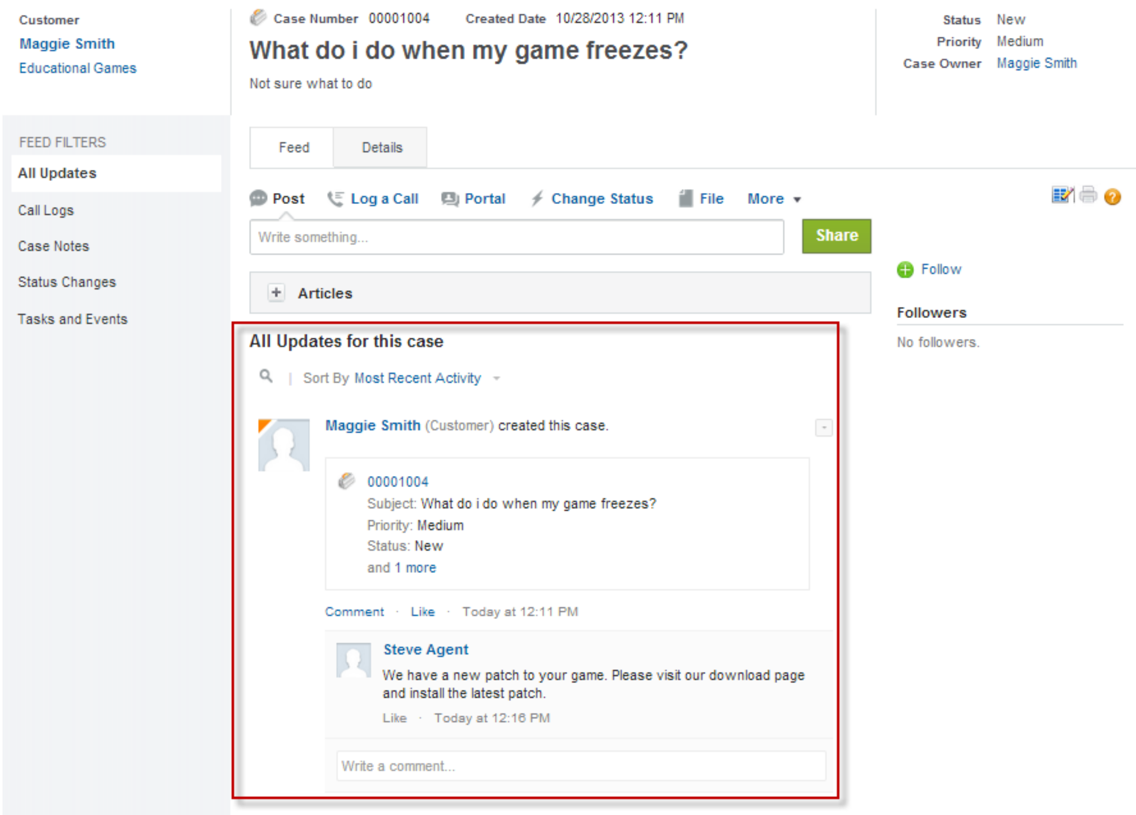
11. Click **Save**.

Example: We've just set up Salesforce Knowledge! After we finish enabling the rest of the Service Cloud features, we'll set up the data categories that will organize articles for Salesforce Knowledge and questions in Chatter Answers.



Let Members and Agents Work with Cases in the Feed

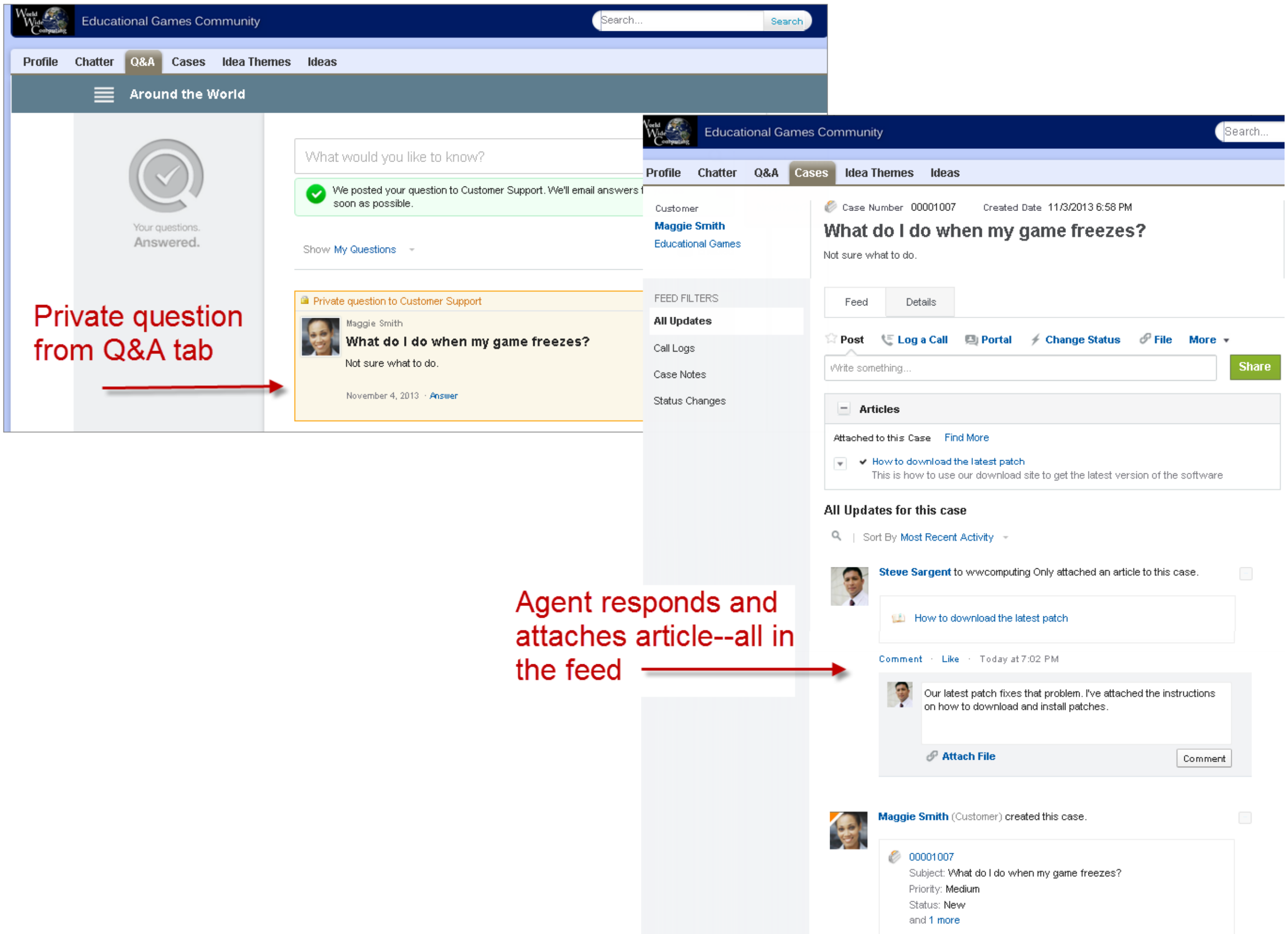
When you set up Cases in the feed, agents have a simple way to respond to questions that turn into cases and resolve them in record time. Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. Case Feed includes publishers and a Chatter feed. The publishers let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case. Agents can search for and attach an article to a case right from the feed.



And—great news—organizations created after the Winter '14 release have Cases and Case Feed enabled already! All we have to do to make this awesome tool available to our members is to add the Question field to the Case layout and Case Feed Layout. Sweet!

1. From Setup, click **Customize** > **Cases** > **Page Layouts**.
2. In Case Page Layouts, click **Edit** for the Case Layout.
3. Drag the `Question` field into the Additional Information related list.
4. In Page Layouts for Case Feed Users, click the down-arrow next to a layout and choose `Edit feed view`.
5. Click **Save**.

Example: Look at how easily your community members can communicate with agents! Your members can send a private question to your agents and yours agents can answer from the case feed.



That was quick! Now that we've got the basic Service Cloud features enabled, we'll get ready to welcome members to the community by creating profiles and users.

Beyond the Basics

Salesforce Knowledge and Cases combine to provide a powerful customer support tool. There are all sorts of great tools in Case Feed that will help your agents keep your customers smiling. You can find all of the details in the Salesforce help.

Use Profiles to Manage Community Membership

Profiles help manage community membership and access to information. For example, we can grant or remove access for group of users simply by changing the access of the profile or permission set. For simplicity, we'll stick to profiles for now. Once you add a profile to the community, all users assigned to it become members of the community—so it makes adding members a snap! The Customer Community license already comes with a Customer Community User profile. In the next step, we'll use it for customers who we add to the community or who add themselves through self-registration.

But we'll need a profile for the service agents who'll work in the community. Your company's support agents are the ace troubleshooters of the community and keep issues from escalating by managing cases efficiently. To do all of this, they need extra access to objects like cases, knowledge articles, and questions. For example, they might need to both create and edit knowledge articles. Or you might want to give them moderation privileges in the community. Let's create the profile that gives service agents access to the tools they need to help customers.

1. From Setup, click **Manage Users** > **Profiles**.
2. In the Profiles list page, click **New Profile**, then select the Standard User profile.
3. Type `Service Agent` as the new profile name.
4. Click **Save**.
5. Click **Edit** on the Profile Detail page.
6. On the Profile Edit page, type a description of the profile.
7. Skip the Custom App Settings section. We'll accept the default settings there.
8. In the Tab Settings, make sure that `Default On` is selected for the following tabs: Article Management, Cases, Chatter, Ideas, Idea Themes, Knowledge, and Q&A. That way, users belonging to this profile will automatically see these tabs. You can hide the rest of the tabs by selecting `Default Off` for tabs you don't want exposed to service agents.
9. For Administrative Permissions, make sure that `View Data Categories` and `View Global Header` are selected.
10. For General User Permissions, select `Edit Case Comments`, `Manage Articles` and `Manage Cases`
11. For Standard Object Permissions, give the profile `Read`, `Create`, `Edit`, and `Delete` permission on `Cases`, `Ideas`, `Idea Themes`, and `Questions`.
12. In the Article Type Permissions section, make sure that `Read`, `Create`, and `Edit`, and `Delete` are selected for Basic Articles.

    We want service agents to be able to create and edit articles.
13. Click **Save**.
14. Navigate to **Manage Users** > **Users**.
15. Click **New User** and create a few users that you assign to the Service Agent profile.

Example: Now that we have support agents to take care of community members, let's create the profile for our customers!

Beyond the Basics

You might want to add a few moderators to your community! In a successful community, members are actively engaged and communicating with others. A community moderator facilitates knowledge sharing within a community to help members benefit and derive value from their participation. The moderator also helps to ensure that all communications and content in the community are appropriate. You can assign one or more people to act as moderators in your community. Moderators can be either employees from your company or external users who are members of your community. Learn more about assigning community moderators in the Salesforce Help.

Create a Profile for External Users

Now we need to create a profile for community members. We'll clone the Customer Community User profile, and create the Self-Service Customer Community User for customers who we add to the community or who add themselves through self-registration. All we need to do now is make a few small changes to ensure that we've got the right tabs showing up for our customers when they sign in!

1. From Setup, click **Manage Users** > **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. In the Tab Settings, make sure that `Default On` is selected for the following tabs: Cases, Chatter, Ideas, Idea Themes, Profile, and Q&A. That way, users belonging to this profile will automatically see these tabs.

   The rest of the tabs should be set to `Default Hidden`.
6. Accept the default values in the Administrative Permissions, General User Permissions, and Standard User Permissions sections.
7. In the Article Type Permissions section, make sure that `Read` is selected for Basic Articles.

   We want customers to be able to read articles, but not make any changes to them.
8. Click **Save**.

Example: We're set up with profiles for the two main characters in our community. Now it's time to give ourselves the ability to add members to the community manually. Later, we'll set up the options to let users register themselves.

Create External Users for the Community

You have two options for granting external users access to the community:

- You can create external users and assign them a profile so that they can access the community.
- You can enable self-registration so that users can create usernames and passwords themselves.

Later in this guide, we'll go through the steps to let members self-register for the community. But for now, we're going to set up the option to add some external users manually. That means that we've got to enable each external user's contact record as a customer user and then send an email with login credentials. Let's get to it!

1. Navigate to the Contacts tab and click `New` to create a new contact.
2. Enter details about your user. At a minimum, you need to enter a last name and an account name. Remember to use the Educational Games account for the members of our community.
3. Click **Save**.
4. On the Contact detail page, click **Manage External User**, then **Enable Customer User**.
5. Edit the user record for this external user.
   a. Type values for `Email`, `Username`, and `Nickname`.
   b. Select the `Customer Community` license and the `Customer Community User` profile for external users. Remember that profiles give users access to tabs in your community, so be sure you choose a profile that has the appropriate tabs exposed.
   c. Accept the defaults for the rest of the options on the page.
   d. Make sure to clear **Generate new password and notify user immediately** so that users don't receive a password before the community is published. When you publish the community, the user will receive a welcome email with their login information, as long as the `Send welcome email` option is selected for the community.
6. Click **Save**.

   Note: If you're using a brand new org and don't have any roles set up, you might receive a message letting you know that you need to set up a role. Just create a role and add yourself to it and you're good to go.
7. Follow these steps to add several users who are members of the Customer Community User profile.

Example: Now that we have profiles and users, we can create special groups of community members who are the service agents and the product experts in our community.

Beyond the Basics

You can bulk load users with the Data Loader to avoid manually adding each one. See the “Data Loader Overview” in the Salesforce Help to find out more about using the Data Loader.

Let Members Submit Questions Directly to Agents

When we set up Chatter Answers, we enabled the option to let members ask private questions directly to support agents. To be able to ask a question and have it automatically turned into a case, we need to set field-level security for the Question field.

1. From Setup, click **Customize** > **Cases** > **Fields**.
2. Click `Question`.
3. Click `Set Field-Level Security`.
4. Select the checkbox to make the field visible for every profile that you’re adding to the community.

Example: Nice work! Let’s move on to our next task.

Create Groups for Service Agents and Community Experts

Note: This step assumes that you already have some Salesforce users set up in your org. If you are using a brand new Salesforce org, you’ll need to create some test users so that you can complete this step. You’ll be able to find everything you need to show you how to set up users in the Salesforce Help.

Now it’s time to set up two groups that play an important role in Chatter Answers and in Ideas. WorldWide Computing wants to set up two special groups of users: customer service agents to monitor the Chatter Answers Q&A tab and a group of experts who have superior knowledge in the Educational Games community who can monitor incoming ideas.

When a community expert posts a comment or idea, a unique icon ( ) displays next to his or her name so other community members can easily identify credible information within the community. You can designate as many community experts as necessary.

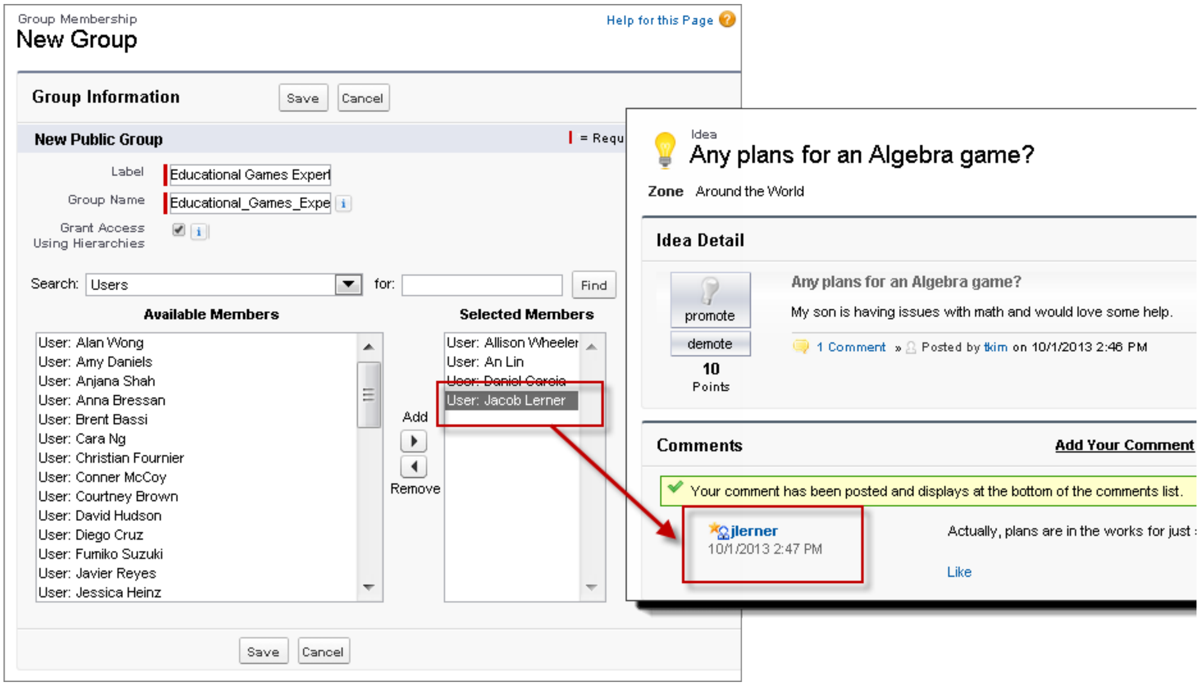
The other group will be made up of the service agents who monitor the Chatter Answers Q&A tab and perform other activities in the zone. We’ll create a group called “Community Service Agents” that we’ll associate with Chatter Answers later in the setup process.

Let’s get started!

1. From Setup, click **Manage Users** > **Public Groups**.
2. Click **New** to create the group of experts for the Educational Games zone.
3. In the `Label` field, type `Educational Games Experts` for the name of the group.
4. For the `Group Name`, type the same name with underscores instead of spaces for this field. This is the unique name used by the API and it must begin with a letter and use only alphanumeric characters and underscores.
5. Select **Grant Access Using Hierarchies** to allow automatic access to records using your role hierarchies. When selected, any records shared with users in this group are also shared with users higher in the hierarchy.
6. From the **Search** drop-down list, select `Users` so that you can select the specific users to add to the group.
7. Select members from the Available Members box, and click **Add** to add them to the group.
8. Click **Save**.

9. Repeat those steps to create a second group that's made up of users who are the service agents for the community.

Example: We've created two groups that organize some of our users into categories and now we'll create some categories that will help organize questions and knowledge articles.



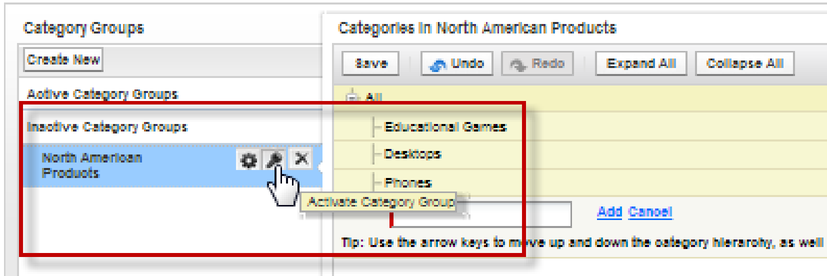
Create Data Categories to Organize Questions and Knowledge Articles

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, they'll leave frustrated. Our next step is to create the data categories that will help to organize questions and articles so that members can browse for answers and for articles in an organized way.

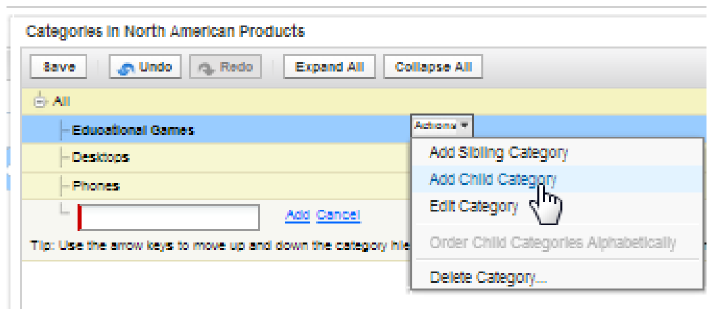
A category group provides one or more categories that help organize questions for easy browsing. WorldWide Computing wants to create the following category groups for North American products: Phones, Educational Games, and Desktops. Within each of those categories will be sub-categories for specific products.

1. From Setup, click **Customize** > **Data Categories** > **Data Category Setup**.
2. Click **Create New** to create the data category group.
3. Type `North American Products` in the `Group Name` and enter a description. This name appears as the title of the category drop-down menu on the Article Management and Articles tabs, and, if applicable, in the public knowledge base. The `Group Name` does not appear on the Q&A tab.
4. Click **Save**.
5. Click the North American Products category group and hover over `All` so that you can click **Actions**.
6. Click **Add Child Category**, type `Educational Games`, and click **Add**.

   Repeat this step to add `Desktops` and `Phones`.
7. To activate a category group so it's available to users, move the mouse over the North American Products category group in the Inactive Category Groups and click .



8. Hover over the `Educational Games` category, click **Actions**, then select **Add Child Category** and type *`Around the World`* in the text box. Click **Add**.

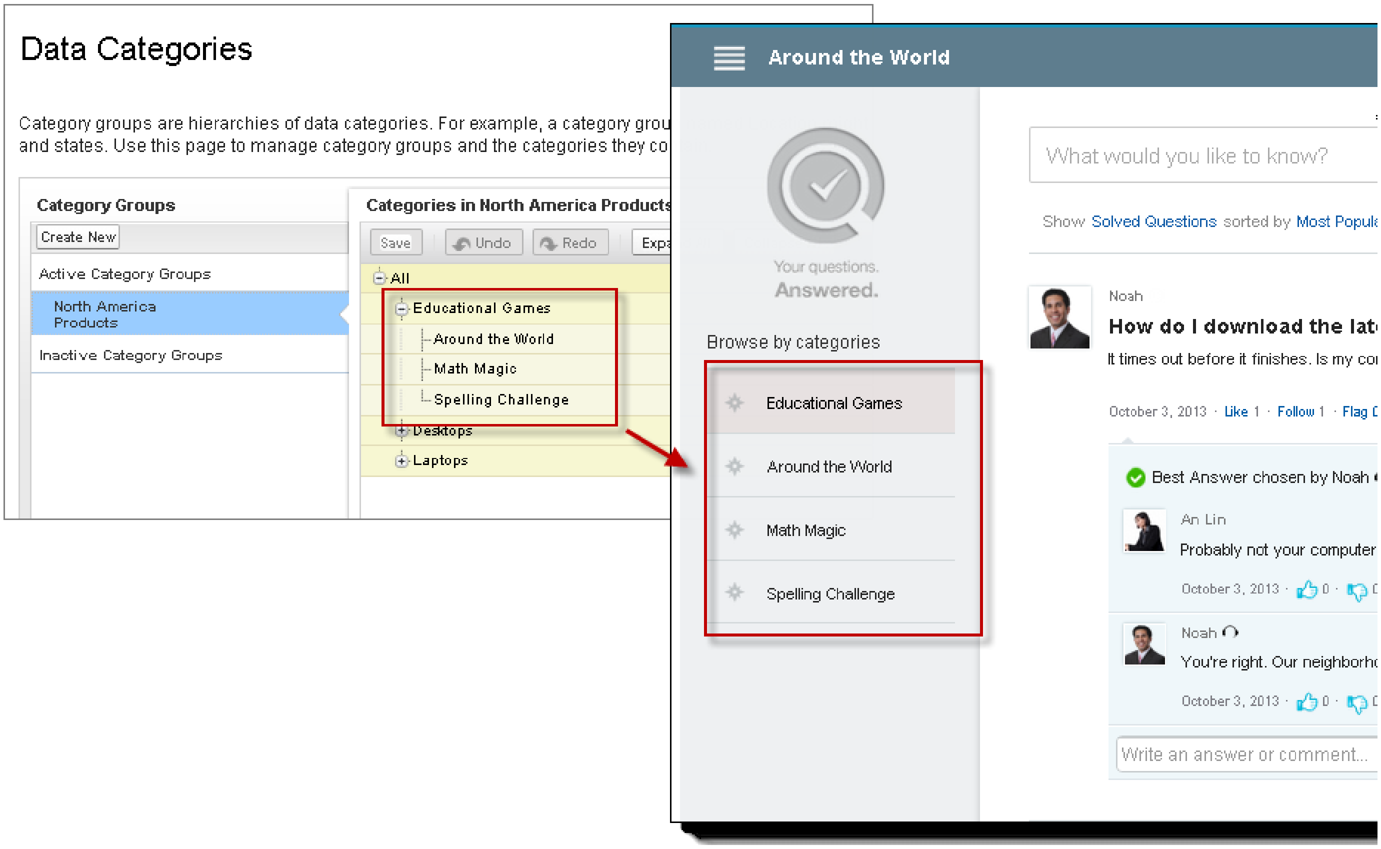


Repeat this step adding *`Math Magic`* and *`Spelling Challenge`* as additional child categories.

9. Optionally, repeat the steps to add the Desktop and Phone categories with product child categories.

10. Click **Save**.

Example: Good job creating some structure in our community for questions and articles! Now we'll make sure that these categories are visible to our community members.



Make Data Categories Visible to Members

Once you've created the data categories for Chatter Answers and Salesforce Knowledge, you need to let community members see the categories when they view questions and articles.

By default, members can see all categories within an active category group. You can restrict category visibility after you have set up your data categories to make sure that users only access articles and questions that you want them to see.

Data category visibility can be set using roles, permission sets, or profiles and determine the categorized questions or articles that members can see. There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible based on their role, permission sets, or profile.

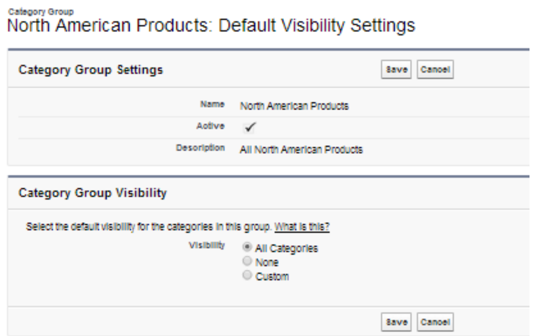
WorldWide Computing wants to set up data category visibility so that the Self-Service Community User profile can see all data categories.

1. From Setup, click **Customize** > **Data Categories** > **Default Data Category Visibility**.
2. Click **Edit** for the North American Products group.
3. Make sure that the category group is active.
4. Select `All Categories`.

This will ensure that the community members can see all of the North American products and the categories that exist beneath them.

5. Click **Save**.

Example: Now that we've ensured all of our categories are visible, let's make sure that they've available on the Chatter Answers Q&A tab.



Link Data Categories to Questions

Now we need to associate the North American Products data category group with questions so that members can filter and browse questions based on the categories.

1. From Setup, click **Customize** > **Chatter Answers** > **Data Category Assignments**.
2. Click **Edit**.
3. Select the `North American Products` category group.
4. Click **Save**.

Example: Done! Last, but not least, we need to associate the categories with the profiles we've set up for service agents and our customers.

Link Data Categories to Profiles

Now that we've set up our data categories, we need to link them to the profiles of the users who need access to the data categories.

1. From Setup, click **Manage Users** > **Profiles**.
2. On the Profiles page, click the name of the **Self-Service Community User** profile.
3. Scroll down to the bottom of the profile page and in the Category Group Visibility Settings, click **Edit** for North American Products.
4. Select **All Categories** to enable this profile to see all of the categories.
5. Click **Save**.
6. Repeat this task for the Service Agent profile.

Example: We're done with Data Categories! Now, we set up zones within our community. What are zones, you ask? Let's move on to the next task and find out!

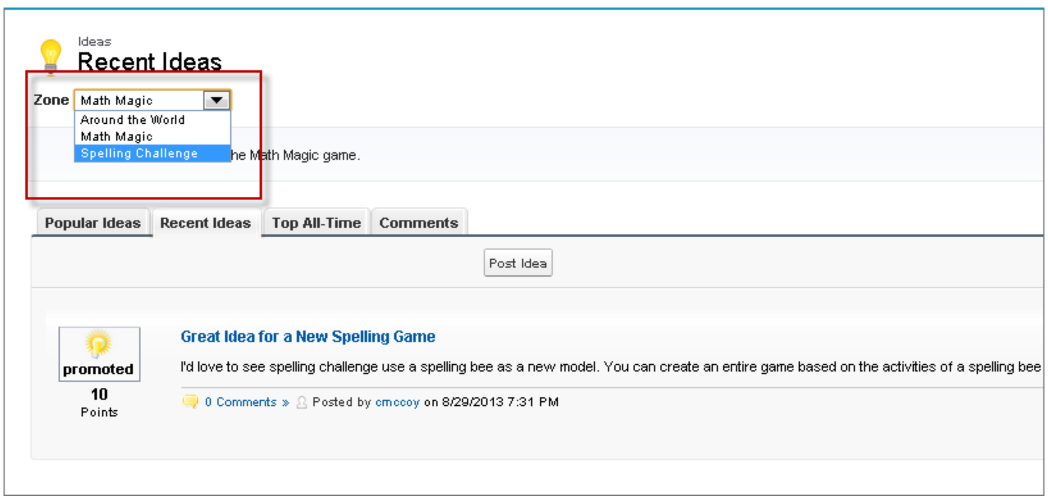
Organize Your Communities Into Zones

What's a zone? Zones organize ideas and questions into logical groups within a community, with each zone having its own focus and unique ideas and questions. Zones are shared by Ideas and Chatter Answers, allowing you to view and create zones from those locations. For example, WorldWide Computing will have an internal zone in which employees can collaborate and they'll have zones for each of the games within the Educational Games community.

Users will see zones, search results, and the content associated with the context defined by their user profile.

- Internal users with permission to access Ideas and Chatter Answers can see all zones. If internal users sign in to a community, they see only those zones associated with that community.
- Community users see the zones associated with the community they're signed in to.
- Global searches in the internal application performed by internal users return results from all ideas and questions that are available within the organization. Searches performed by all other users in Salesforce Communities return results from the ideas that are available within the community.

Eventually, WorldWide Computing wants to create communities for each of its main product lines: educational games, desktops, and phones. But for now, we'll create just the Educational Games community with a a separate zone for each of the top educational games: Around the World, Math Magic, and Spelling Challenge. That way, community members can focus their discussions on the specific product that they're using. In this example, the community member posting this idea can select the zone in which their post appears.



Set Up Zones within Your Community

Zones are shared by Ideas and Chatter Answers, allowing you to view and create zones from either application. So we can set up Zones in one feature and it will automatically be set up in the other. In the Educational Games community, we'll create zones for three games: Around the World, Math Magic, and Spelling Challenge.

1. From Setup, click one of the following paths.
   - **Customize** > **Ideas** > **Zones**
   - **Customize** > **Chatter Answers** > **Zones**
2. Click **New** to create a new zone.

   By default, an internal zone is already created for you. Internal users with permission to see Ideas and Chatter Answers can see all internal-only zones in the organization. If internal users sign in to a community, they see only those zones associated with that community.

3. Type *`Around the World`* in the `Name` field and add a description that clearly identifies the zone's purpose.
4. Select the `Active` checkbox to display the zone to the community. You can't delete zones, so if you need to hide a zone, make sure that `Active` isn't selected.
5. Select the `Username Format` to specify how usernames appear throughout the zone in posted questions and answers.
6. Skip the step to configure visibility for the zone. We've only set up the groundwork for our community, so so we'll have to come back to select the community name after a few more steps.
7. Select the checkbox `Enable for Chatter Answers` to so that community members can use the Chatter Answers Q&A tab.
8. Select the option to `Enable Private Questions`. WorldWide Computing will implement the option to let customers post their questions privately to customer support and create a case.
9. For the `Data Category for Top-Level Topics` field, select **Educational Games**.

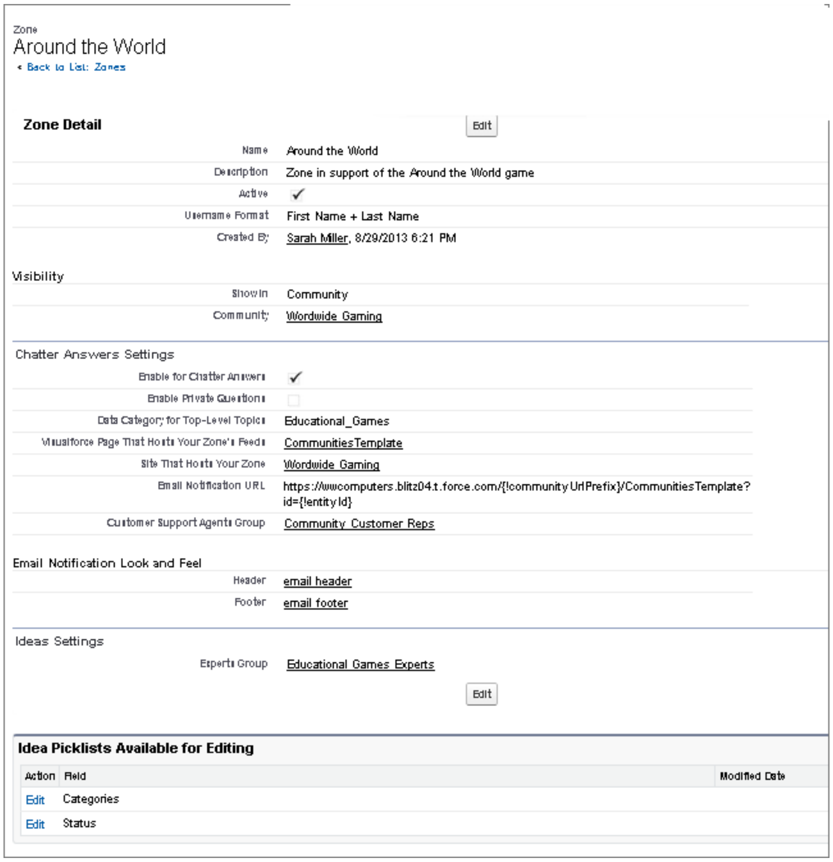
   This data category is used to organize questions, replies, and articles in your zone's Topics sidebar.
10. Skip the option to select the `Visualforce Page That Hosts Your Zone's Feeds`, because we'll use the one that is automatically provided for now. In the future, WorldWide Computing will create a Visualforce page on which to display questions, replies, and knowledge articles.

    If you don't choose a Visualforce page, one is automatically generated when you save your zone. The generated page includes your zone's ID so that topics, questions, and replies are associated with your specific zone and can display on it. The page is named after your zone with a suffix of "_main," for example, `ZoneName_main`. The page also includes a language attribute that matches your organization's default language.
11. Leave the `Site That Hosts Your Zone` field blank. Because we associated the zone with a community that does not require authentication for users to view zone activity, the system populates this field automatically.
12. Skip the step to add a customized `Email Notification URL`. If WorldWide Computing wants to have a customized login page in the future, they can enter this information at that time.
13. In `Customer Support Agents Group`, select the Service Agents group that we set up earlier. This is the public group of users who will act as support agents for the zone. These users will have a headset icon next to their username in the zone.
14. In `Header` or `Footer`, click and choose the email header and footer files that we uploaded earlier. These are the files that incorporates your organization's branding into the headers or footers of email notifications sent from the zone.

    You can choose only a file that has been uploaded to a publicly accessible folder on the Documents tab and marked `Externally Available Image`. The files you include in the fields can have a combined size of up to 10 KB.
15. In the `Experts group` field, select the **Educational Games Experts** group of experts to monitor the zone for Ideas.
16. Click **Save**.

    After we set up the `Status` and `Category` fields, we'll come back and add the fields to the zone.
17. Repeat these steps to create zones for Math Magic and Spelling Challenge.

Example: That was one of our longer tasks, but we've set up a feature that spans both Chatter Answers and Ideas. Let's move on and set up the email messages that members receive when they post or respond to questions.



Let Members Reply to Questions and Comments with Email

Your members might want the convenience of viewing comments and answers from email, instead of having to log into the community and go to the Q&A tab. When members receive email notifications related to a question, they can reply directly from the email and the reply appears as an answer in the thread in the community. Members receive an email notification for the following events:

- Someone answers a question they've asked or are following
- An agent or a moderator selects a best answer for a question they've asked or are following

We'll decide when email is sent to members by configuring the notification settings that apply to all of the zones in the community. Each email includes a link to a specific zones so that members can easily return to it.

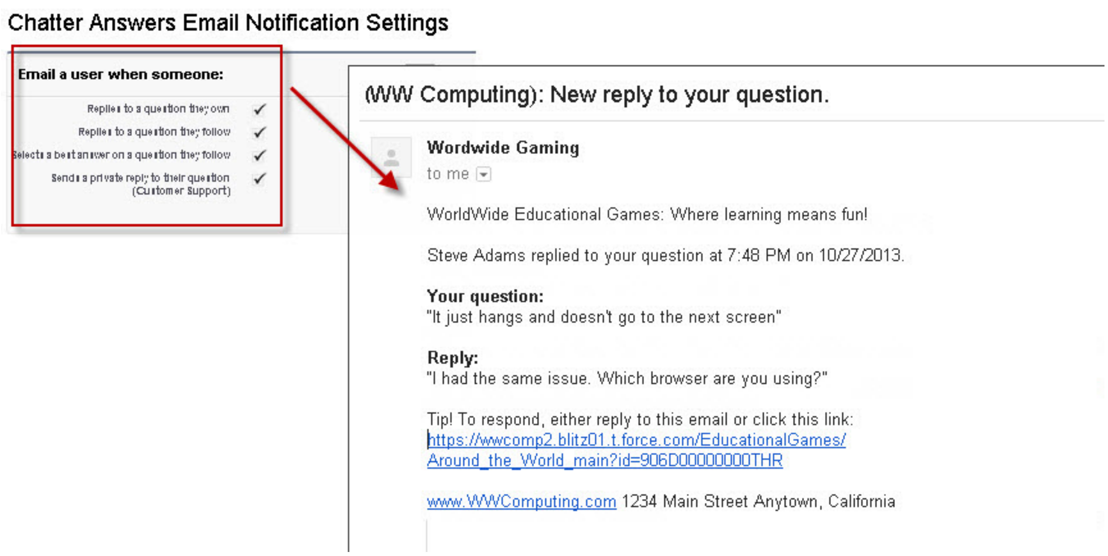
1. From Setup, click **Customize** > **Chatter Answers** > **Email Notification Settings**.
2. Click **Edit**.
3. Select all of the following settings:

Option	Sends email to customers when...
`Replies to a question they own`	Other users reply to their questions

Option	Sends email to customers when...
`Replies to a question they follow`	Other users reply to questions they're following
`Selects a best answer on a question they follow`	A best answer is selected for a question they're following
`Sends a private reply to their question (Customer Support)`	A support agent responds to their questions privately

4. Click **Save**.

Example: Email replies are so convenient and your members will be really pleased with what we've just set up.



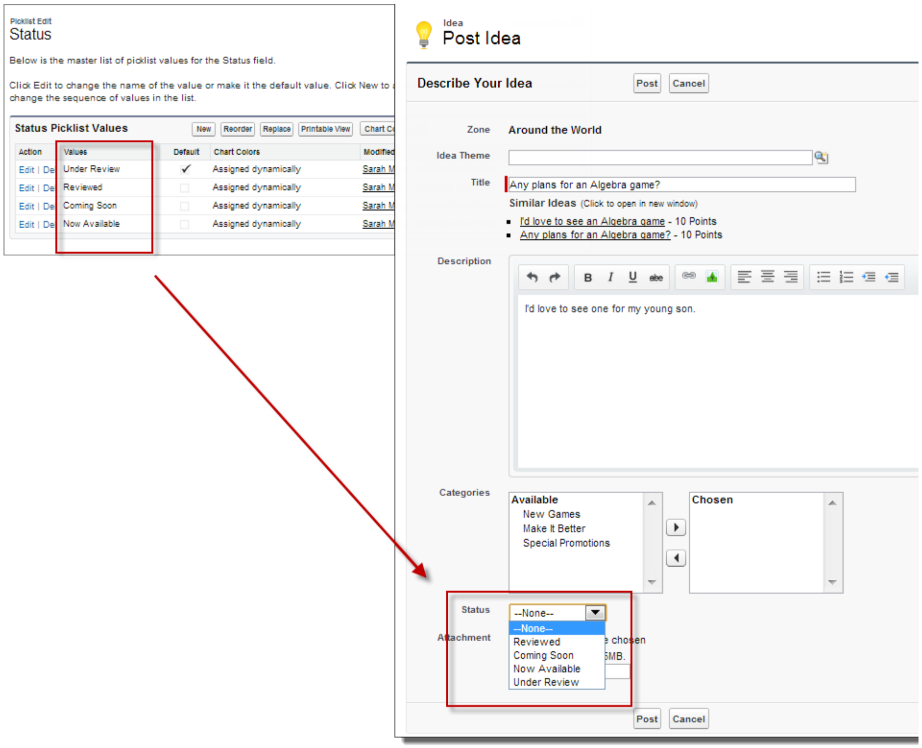
Create Values to Track the Status of Ideas

An idea's status helps community members track the progress of the idea. For example, "Under Review," "Reviewed," "Coming Soon," and "Now Available" are common status values that an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all members to see. For members of a community zone to view an idea's status, we need to define picklist values for the `Status` field.

1. From Setup, click **Customize** > **Ideas** > **Fields**.
2. Click **Edit** next to the `Status` standard field.
3. On the Picklist Edit page, click **New**.
4. Type `Under Review`, `Reviewed`, `Coming Soon`, and `Now Available` in the text box. Make sure that you type one entry per line.
5. Select the **Around the World**, **Math Magic**, and **Spelling Challenge** zones to make the different status levels available.
6. Click **Save**.
7. To make Under Review the default status, click **Edit** and select the `Default` checkbox.

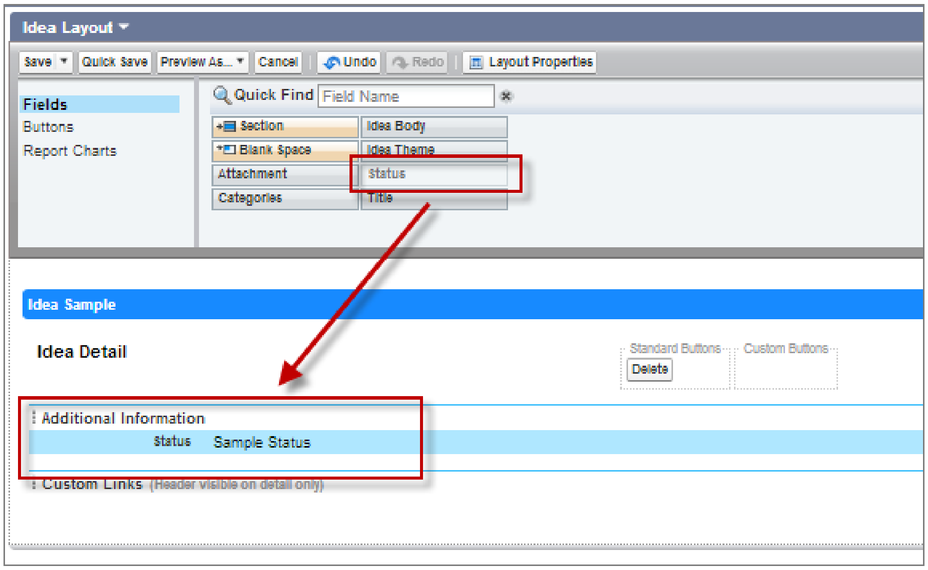
8. Click **Save**.

Example:



Once you've finished creating the Status field, you'll need to add the status field to the page layout.

1. To add the Status field to the page layout, from Setup click **Customize** > **Ideas** > **Page Layouts**.
2. Click **Edit** in the Idea Layout.
3. Select the `Status` field and drag it to the **Additional Information** section in the order you'd like it to appear on the page.
4. Click **Save**.



Good work creating status values for ideas! Time to set up some values for the categories we use for submitting ideas.

Create Categories for Ideas

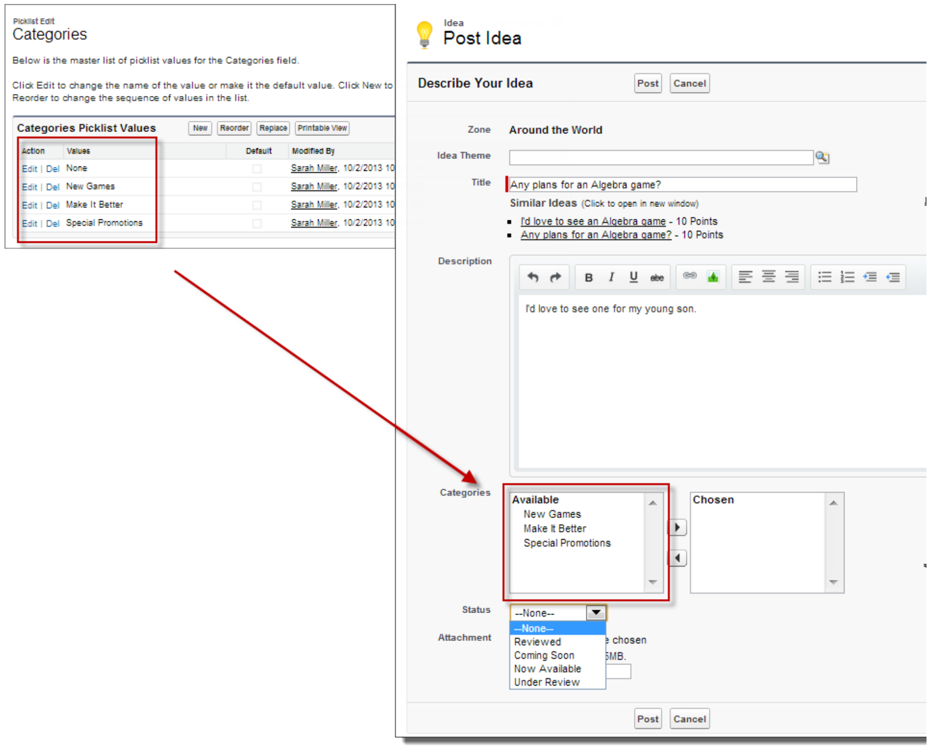
Next, we'll create picklist values for the `Categories` field. Categories help organize ideas into logical subgroups within a zone, just as data categories organize questions and knowledge articles. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas.

The categories that organize Ideas and Idea Themes are separate from the Data Categories that organize questions in Chatter Answers and articles in Salesforce Knowledge. This gives us the flexibility to create different kinds of categories to use as customers collaborate and inspire each other with new thoughts. WorldWide Computing wants to create categories in the Educational Games zone to solicit ideas for new games, improvements to existing games, and special promotions. After we create our status and category fields for Ideas, we need to add them to the zones that need to use them. We'll start with creating the picklist values for the Around the World zone.

We'll also set up categories that can be used to filter posts in the zones. For the Educational Games zone, we'll create the categories: "New Games," "Make It Better," and "Special Promotions."

1. From Setup, click **Customize** > **Ideas** > **Fields**.
2. Click **Edit** next to the `Categories` field and click **New**.
3. Type *`New Games`*, *`Make It Better`*, *`Special Promotions`*. Make sure that each entry is on its own line.
4. Select to make these categories available in the following zones: Around the World, Math Magic, and Spelling Challenge.
5. Click **Save**.

Example: Now that we've set up statuses and categories, we'll make them visible to our community members.



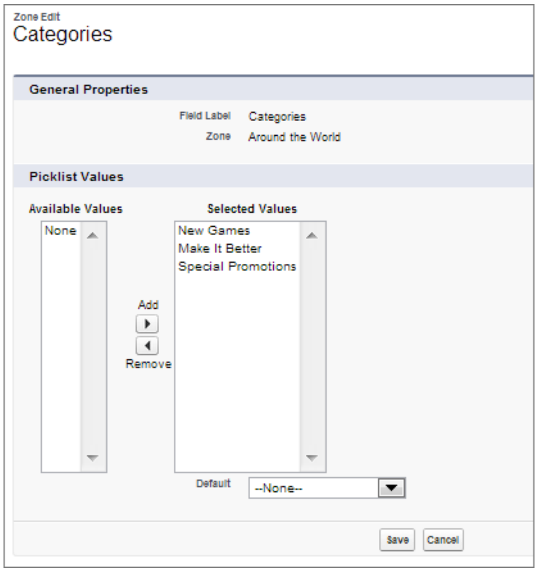
Make Ideas Categories and Statuses Visible to Members

Now that we've created the picklist values for categories and statuses, we'll assign them to their respective zones.

Note: Depending on your license type, some of these options may already be enabled. Lucky you! If that's the case, then just move on to the next step!

1. From Setup, click **Customize** > **Ideas** > **Zones**.
2. Click the name of the `Around the World` zone.
3. In the Idea Picklists Available for Editing section, click **Edit** for Categories.
4. Select `New Games`, `Make It Better`, and `Special Promotions` from the Available Values box and click **Add** to move them to the Selected Values column.
5. Skip the step to assign one of the values as default.
6. Click **Save**.
7. Repeat the same process for the Status fields.
8. Make sure to repeat these steps to make the Categories and Status values available in the Math Magic and Spelling Challenge zones.

Example: Congratulations! We've finished setting up the nuts and bolts of our Service Cloud features! We have one last feature to set up and this one gives us a chance to use a little artistic expression!



Create a Contest with Idea Themes

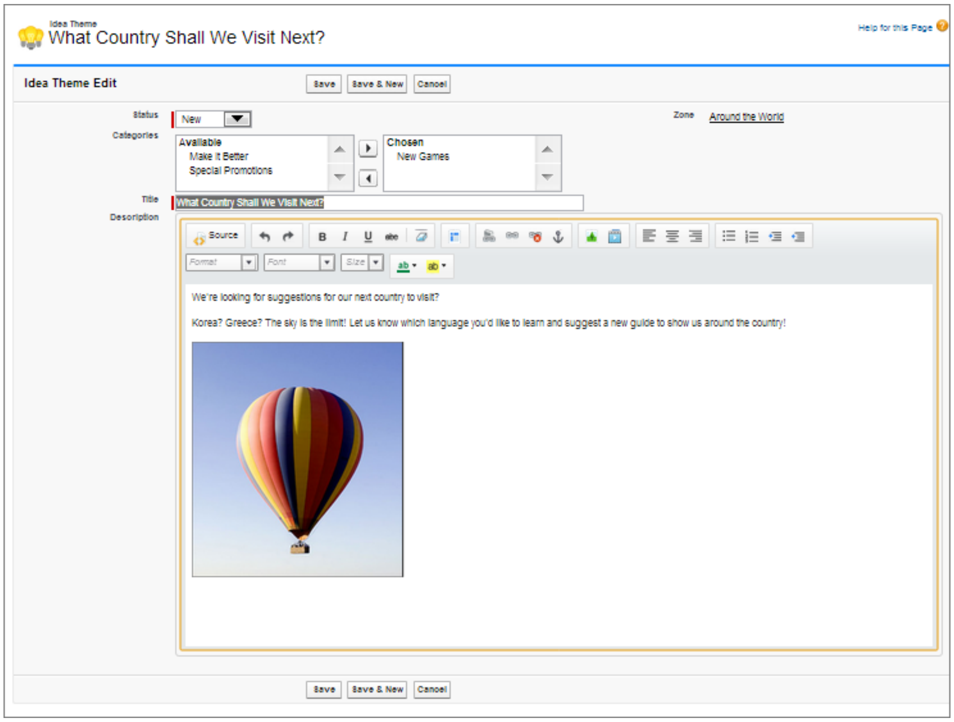
Idea Themes lets your customers come up with awesome ideas for projects that you're working on. And with that feedback, you can deliver exactly what they want, keeping customers super happy!

One of the first contests that WorldWide Computing wants to spin up is for a new geography game for kids. Let's put it together and see how the community responds!

1. Navigate to the Idea Themes tab, and click **New Idea Theme** from the Idea Themes list view page, or click **New** from the Recent Idea Themes list on the Idea Themes overview page.
2. Select the `Around the World` zone for the contest and click `Continue`.
3. Select a `Status` of **New**.
4. Select **New Games** and click the arrow to add it to the list `Chosen` categories.
5. Add *`What Country Shall We Visit Next`* as the title of the contest.
6. Enter a description of the contest.

   This is where you can explain the contest to users. Use the HTML editor to format the text or add an image or video. You can really add some visual interest and create some excitement by adding some cool graphics or a compelling video that explains the contest. Have fun with it!
7. Click `Save`.

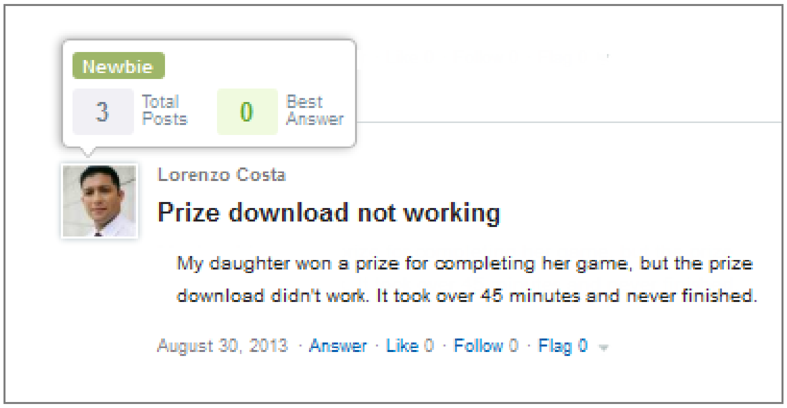
Example: That was fun! The final task in this section isn't really a task at all. When we switched on Reputation when we enabled both Ideas and Chatter Answers, we gave our members the ability to earn points through participating in the community. Let's take a look!



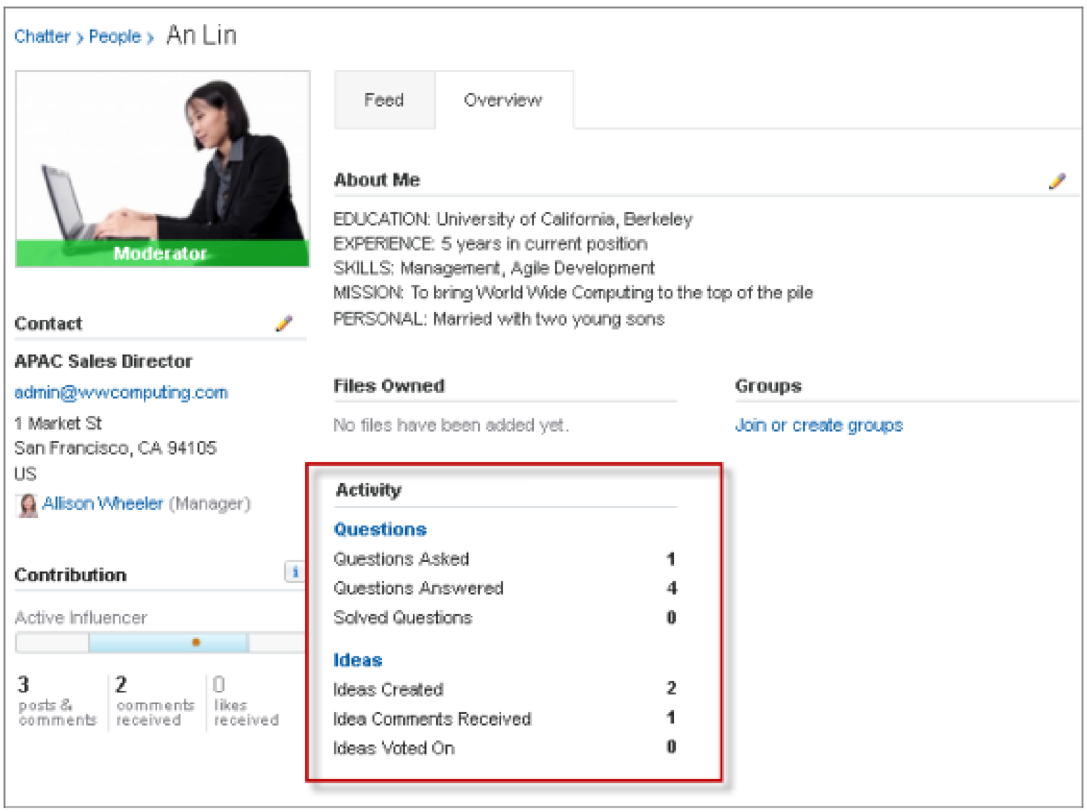
Rewarding Participation with Reputation and Community Activity

Tap into the expertise and knowledge of your most active community members by rewarding their activity. We've already enabled Reputation for both Chatter Answers and Ideas, so now members earn points and ratings that display in hover details over their photo in the feed and also appear on their profile in the Activity section of the Overview tab. As your star posters engage more frequently, they improve the overall content in your community, providing better answers for users who are searching for help. This means that users who are searching for a solution can be confident that an answer from an expert can be trusted, which means fewer support calls for your organization. Your members also gain points for when they add compelling ideas that help to spark creative thinking within the community.

Users earn points when their posts receive votes or are selected as the Best Answer for a question in any of the zones to which they belong. When they earn enough points, the hover details show their reputation as well as the number of posts and questions they've resolved in that zone.



Activity statistics, such as how many posts members have made and how many likes they've received in Ideas and the Q&A tab appear on their profile page so that others can learn about their participation in the community.



Example: Congratulations! We've just set up our Service Cloud features and can move on to defining the community that hosts those features!

Beyond the Basics

If you want to add or edit Chatter Answers reputation level names or points per level in any of your zones, use the ChatterAnswersReputationLevel object in the API.

Same thing goes for Ideas! To add or edit reputation level names, points per level, or other attributes of a reputation in any of your zones, use the IdeaReputation and IdeaReputationLevel objects in the API.

You can create up to 25 different reputation levels for each zone.

CUSTOMIZING YOUR COMMUNITY

Create the Educational Games Community

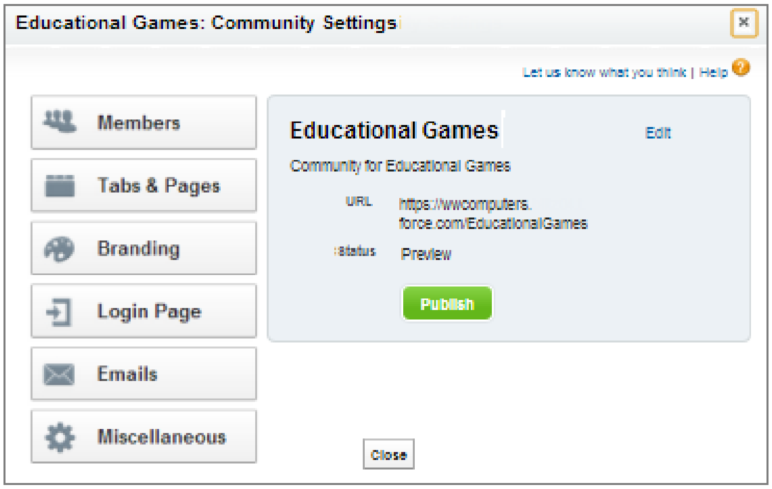
Great job on setting up all of the Service Cloud features that will make our community amazing! Now it's time to put the final touches on our community by naming it, and creating the domain and URL that members use to access the pages within the community.

1. From Setup, click **Customize** > **Communities** > **All Communities**, then click **New Community**.
2. Type *WorldWide Educational Games* as the name of the community.

   Only the first 32 characters of the name appear in the global header drop-down menu. This includes the Preview and Offline status indicators, so use short, distinctive names to help users differentiate between community names.
3. Enter a description of the community.
4. Type *EducationalGames* as the unique value to identify the community at the end of the URL field.

   This value is appended to the domain you created when you enabled the community. For example, https://wwcomp.<computer_name>force.com/EducationalGames

   Note: If, for some reason, you change the community name and URL after the community is published, users won't be redirected to the new URL. If these changes are necessary, be sure to inform your community members before making the change.
5. Click **Create**.
   The community is now created in Preview status.



Remember that when we created our zones, we hadn't yet set up our community. Now is the time that we can circle back and connect the zones to the community that hosts them.

Important: When you create a community, your profile is automatically added to the list of profiles with access. As a result, all users in your organization with this profile can log in to the community once it's published. If you don't want all users with your profile to have access, you can remove the profile and give yourself access through a different profile or permission set.

Add Zones to the Community

Now that we've created our community, we need to go back and connect the Educational Games community to the three zones we've already created: Around the World, Spelling Challenge, and Math Magic. Remember that Ideas and Chatter Answers use these zones to organize ideas and questions.

1. From Setup, click one of the following paths.
   - **Customize** > **Ideas** > **Zones**
   - **Customize** > **Chatter Answers** > **Zones**
2. Click **Edit** next to the `Around the World` zone.
3. In the Visibility section of the page, make sure that we've selected **Community** in the `Show In` field.
4. Select **Educational Games** as the community name and make sure that `Visible Without Authentication` is selected so that guest users can view activity within the zone without signing in.
5. Repeat these steps to edit the Math Magic and Spelling Challenge zones and assign them to the Educational Games community.
6. Click **Save**.

Example: Yay! Now that we've connected zones to the community, we can add some members!

Add Members to the Community Using Profiles and Permission Sets

Now we need some users for our community! Remember the Customer Community User and Service Agent profiles we worked with earlier? We're going to associate those profiles with the community. That way, when an external user self-registers, the system automatically assigns them to the Customer Community User profile and that profile will have access to the Educational Games community. Later in the guide, we'll give external users the ability to self-register as members so that joining a community is simple.

Using profiles and permission sets, you can:

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

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

WorldWide Computing wants to use the Customer Community User profile to grant access to communities. We've already created that profile so our work is easy!

1. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the Educational Games community name.
2. Click **Members**.
3. To add members using profiles:
   a. To filter profiles, select a profile type from the drop-down menu. To search for a specific profile, enter a search term and click **Find**.

      Search returns profiles for the selected filter.

   b. Select the Self-Service Community User profile and click **Add**. Make sure to add the Service Agent profile, as well.

      If your company has a Customer Portal and you want to add those users, select those profiles here, as well. For example, if you have an existing Customer Portal, you could use the High Volume Customer Portal profile to add portal users to the community.

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

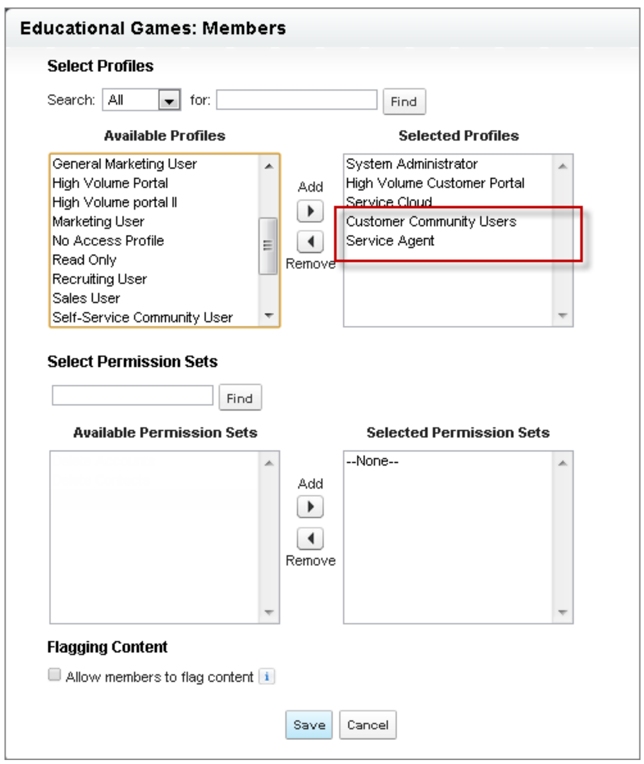
      If you remove a permission set from a community, users with that permission set lose access to the community, unless the users are associated with profiles or other permission sets that are still part of the community. Their posts and comments still appear even after they lose access.

5. Click **Save**.

   When we publish the community, community members who belong to these profiles and permission sets will receive a welcome email. The welcome email includes a username and a change password link if it is sent to an external user who hasn't logged in before.

When a community is in `Preview` status, only members with the login URL can view the community. If a community is `Offline`, only users with the "Create and Manage Communities" permission can access it through the Community menu, regardless of membership.

Example: Now we're making progress! Let's add tabs to our community so that our members have access to all of the great features we've set up.



Beyond the Basics

In the future, WorldWide Computing can set up a separate community for its premium customers. They can create and assign a Premier Customer profile to these members that grants them access to the Premier Customer community.

As an additional option for granting access to the community, WorldWide Computing can enable authentication providers, such as Facebook, so that external users can log into the community without creating an account.

Select the Tabs to Display in the Community

Earlier, we did the work to set up features like Cases, Ideas, and Chatter Answers. Now, we'll give community members the ability to use all of that goodness by giving them access to the different tabs where members can work with those features. Remember that profiles control access to tabs, but we took care of that earlier when we set up the profiles that have access to the community.

We'll add the following tabs for members to use in the community:

Profile
: Lets members view all of their open questions in one place, personalize their profile with a picture, and edit their privacy and security settings.

Chatter Answers (Q&A)
: Lets members ask questions and receive answers from the knowledge base as well as the community.

Ideas
: Lets members view ideas based on status, popularity, and other criteria, making collaboration with other members easy and fun.

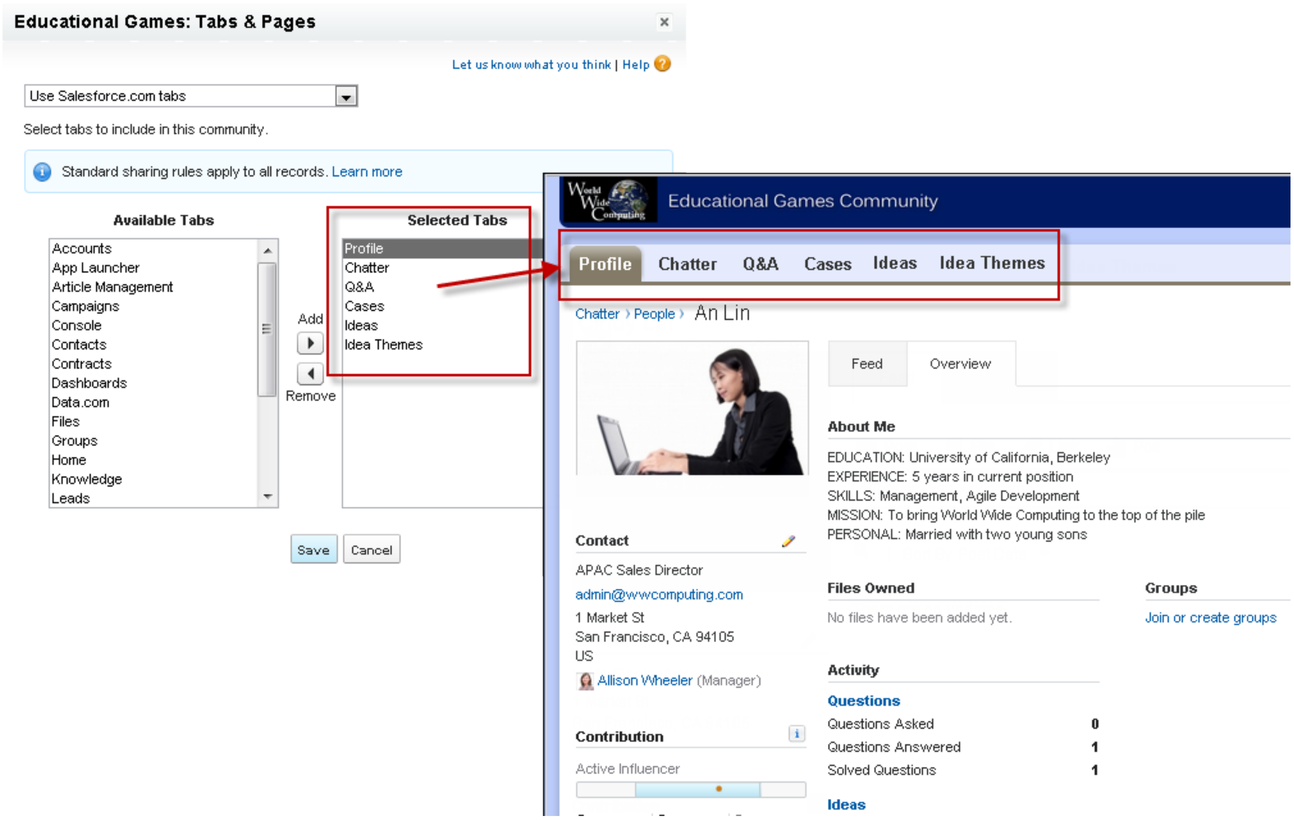
Idea Themes
: Lets members add ideas and vote on contests you create for community members.

Cases
: Lets members work with support agents on active cases.

1. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the Educational Games community name.
2. Click **Tabs & Pages**.
3. Because we won't be creating custom Site.com pages for the community, select `Use Salesforce tabs`.
4. Select the following tabs to include in the community from the Available Tabs list: `Cases`, `Ideas`, `Idea Themes`, `Profile`, and `Q&A`.
5. Click **Up** or **Down** to change the order in which the tabs display.

   Make sure that the Profile page is at the top of the list so that when users access the community, they'll be taken straight to their Profile page.
6. Click **Save**.

Example: Tabs done! Next, we'll add branding elements to make our community look like an extension of our company's website.



Brand Your Community

WorldWide Computing wants the community to match their company's branding so that it's instantly recognizable to the community members. Remember, we've already uploaded the files we'll use to brand the website, so we're ready to go!

1. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the Educational Games community name.
2. Click **Branding**.
3. Use the lookups to choose the header and footer for the community.

   Remember that we uploaded the WWLogo.jpg file and a footer file earlier to use for the welcome email messages. To be consistent in our branding, we'll use it here, too.

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

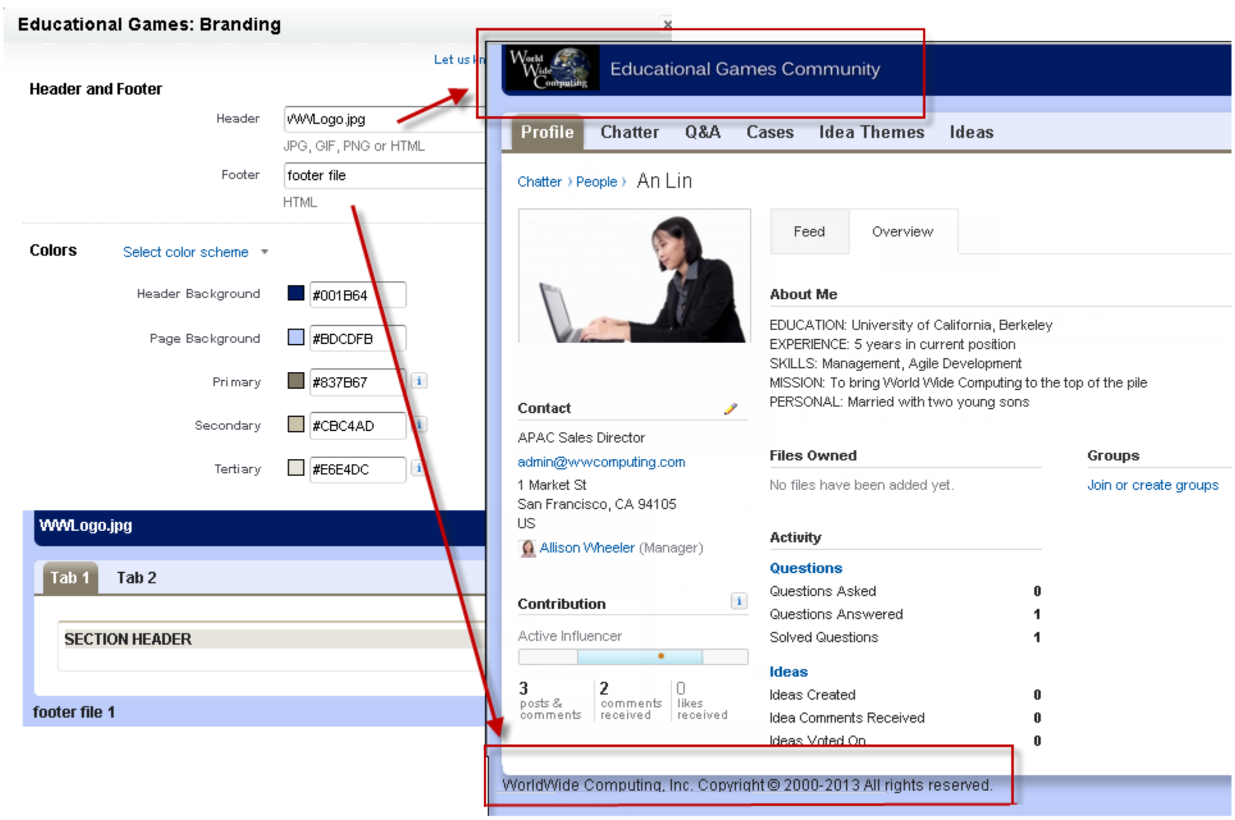
   The colors we select here are shared with the community login page, as well.

Color Choice	Where it Appears
Header Background	Top of the page, under the black global header. If an HTML file is selected in the Header field, it overrides this color choice. It also appears at the top of the login page.

Color Choice	Where it Appears
Page Background	Background color for all pages in your community , including the login page.
Primary	Tab that is selected.
Secondary	Top borders of lists and tables.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

Example: We're almost done! Now we need to set up the pages that our customers use to log into the community.



Set Up the Login Page

The community login page creates a first impression, so let's customize the look and feel of your community login page, from the logo and footer to login options for external users.

Note: The colors used on the login page are inherited from the community branding color scheme. You can customize these other elements on the page, too.

1. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the WorldWide Educational Games community name.

2. Click **Login Page**.
3. Click **Choose File** and navigate to a a logo file that we've saved to the desktop.

   The logo can be a .gif, .jpg, or .png file. The maximum file size is 100 KB. Images larger than 250 pixels wide or 125 pixels high aren't accepted. Uploading a logo automatically creates a Communities Shared Document Folder on the Documents tab and saves the logo there. (The logo and email header and footer that we uploaded earlier are also in the Documents tab, but in a different location.).

4. Enter custom text to display at the bottom of the community login page, up to a maximum of 120 characters. We'll add the URL for WordWide Computing: `WWComputing.com` and the text "WorldWide Educational Games."
5. Select the option to let users log in with their WWComp username and login so that our external community members can use their community username and password to log in.

   In the future, WorldWide Computing might decide to enable Facebook sign-on or Single Sign-On.

6. Select the option `Allow external users to self-register` and select the Customer Community User profile that we created earlier as the default profile. This profile is assigned to users who self-register.

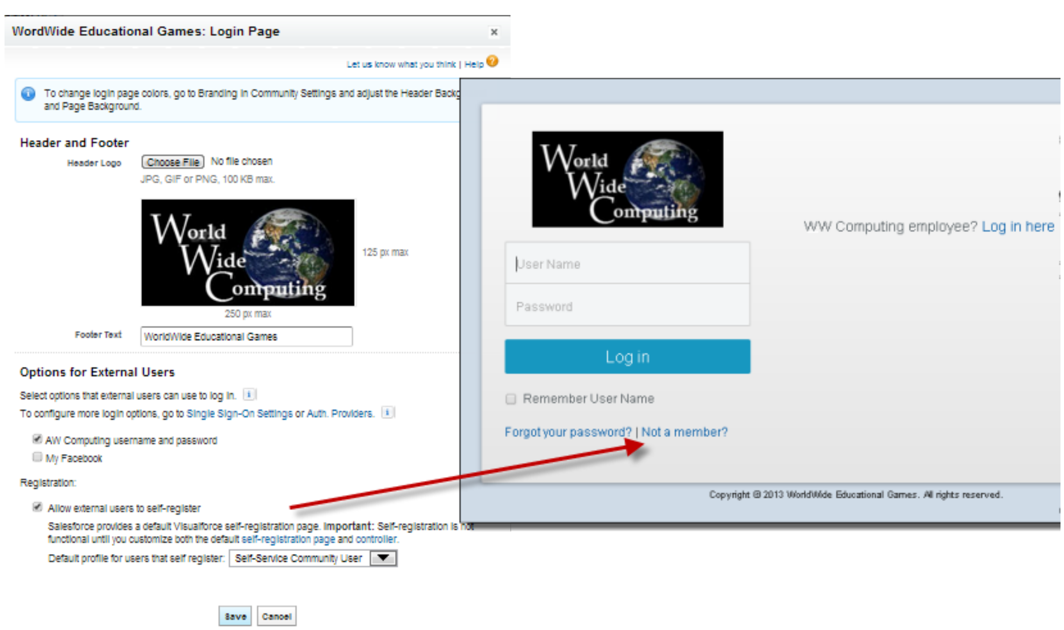
   When this option is enabled, a **Not a member?** link directs external users to the self-registration page.

   The login options for external users are visible to all users on the login page, but only external users can log in. Internal users need to use the link that directs employees to an area where they use their Salesforce username and password to log in.

   Note: Keep in mind that each time a user self-registers, they consume one of your community licenses. When setting up your self-registration page, be sure to add some criteria to ensure the right people are signing up. Additionally, to prevent unauthorized form submissions, we recommend using a security mechanism, such as CAPTCHA or a hidden field, on your self registration page.

7. Click **Save**.

Example: Super! Now we need to put on our programmer's hat and make two tiny changes to some code that will let external users sign in and create user records in Salesforce. Don't worry—you've got this one!



Set Up Self-Registration for External Users

With just two small changes to some code, your customers can self-register and log in from external sites like Facebook! When you enable the login option to `Allow external users to self-register`, it adds a **Not a member?** link to the default login page.

When you create your first community, a default set of self-registration Visualforce pages and associated Apex controllers are created.

`CommunitiesSelfReg` **page and** `CommunitiesSelfRegController`
: Provides the form for partners or customers to create an account.

`CommunitiesSelfRegConfirm` **page and** `CommunitiesSelfRegConfirmController`
: If a user doesn't create a password during self-registration—either because they left the password field blank or your organization customized the self-registration form to omit the password field—this page confirms that a password reset email has been sent. Users landing on this page can't log in until they reset their password.

In the default controller, you must specify the account and the profile that the self-registration process should assign users to. Earlier in this guide, we set up the Educational Games account, so that when users self-register, the contact record they create can be associated with an account. And that's what we'll do—we'll edit three small pieces of code so that members are assigned to the Self-Service Communities User profile and to the Educational Games account. Super simple! This won't be difficult at all and your customers will really appreciate that you're going to make it so simple to register and become a community member.

Tip: You can find the account ID by selecting the account from the Accounts tab and copying the ID at the end of the URL for that page. Use the same tip for copying the profile ID by selecting the Self-Service Community User profile on the Profile page and copying the ID from the URL.

1. From Setup, click **Customize** > **Communities** > **Manage Communities**.
2. Click **Edit** next to the Education Games community, then click **Login Page**.
3. Click the blue **controller** link to edit the `CommunitiesSelfRegController`.

   You can also access the page from Setup, and click **Develop** > **Apex Classes**.
4. Click **Edit**.
5. Scroll down to the value `String profileId = null` and replace `null` with the profile ID of the Self-Service Community User.

   Remember that users who self-register will be assigned to this profile.
6. Comment out the value for `roleEnum` by replacing `null` with `''`.
7. To add the account ID for the Educational Games account, edit the `String accountId = ''` to include the account ID.

   It should look like this when you're done:

```
        String profileId = '00eD0000000zWBO'; // To be filled in by customer.
        String roleEnum = ''; // To be filled in by customer.
        String accountId = '001D000000JRTzb'; // To be filled in by customer.
```

8. Click **Save**.
9. Navigate back to the Login page and select the `Self-Service Community User` profile to assign to users who self-register.

Example: You did it! Now we'll set up the options for the email messages sent to members when they join the community and we are done!

Beyond the Basics

If you want to customize the contents of the default self-registration page to include other fields or branding options, edit the `CommunitiesSelfReg` page.

Customize Community Email

WorldWide Computing wants to use their logo and branding in the welcome email that they send to community members when they register.

1. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the Educational Games community name.
2. Click **Emails**.
3. Type the custom values for WorldWide Computing's name and address or other contact information to replace the default Salesforce values.
4. Customize what displays in the footer of community Chatter emails.

   Important: Both a logo and email footer text are required.

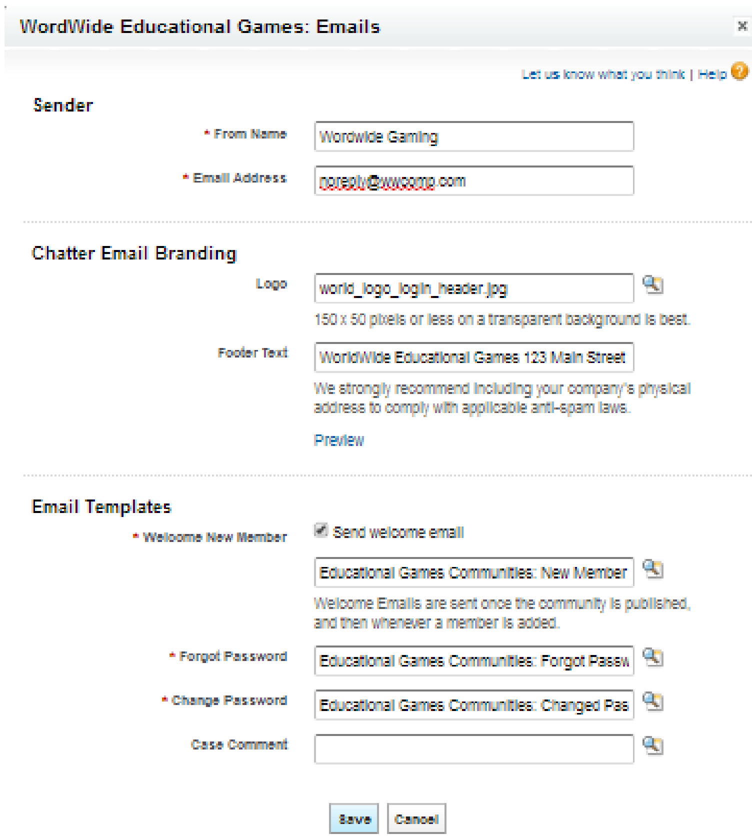
   a. Select the logo that we uploaded to the Documents tab earlier in this process.
      Remember that images with a maximum size of 150 x 50 pixels on a transparent background work best.
   b. Type WorldWide Computing's name and address to replace the default text.
      We strongly recommend including your organization's physical address to comply with applicable anti-spam laws.
   c. Click **Preview** before saving to make sure your changes display properly in a sample Chatter email.
      If your web browser blocks popup windows, you won't be able to view the preview window.

5. Select `Send welcome email` to send email to users when they're added to the community.
   Welcome emails are sent when:
   - A community changes from `Preview` status to `Published` status. Emails are not sent when a community is in `Preview` or `Offline` status.
   - An administrator adds a new profile or permission set to a `Published` community.
   - A user is assigned a profile or permission set that is part of a `Published` community.
   - A user self-registers for the community.

   Note: If a profile or permission set is part of multiple communities, users with that profile or permission set receive a welcome email from each community.

6. Use the default email templates that we've already uploaded. You can also use the lookups to select different templates for welcome emails to new community members, forgotten password emails, and notification emails. You can customize any default template. In the future, WorldWide Computing might want to use email templates to submit case comments, and they can select a template at that time.
7. Click **Save**.

Example: Congratulations! You've just set up a self-service community that has all of the basic functionality you need to make your customers super happy!



Set Up Advanced Chatter Settings (Optional)

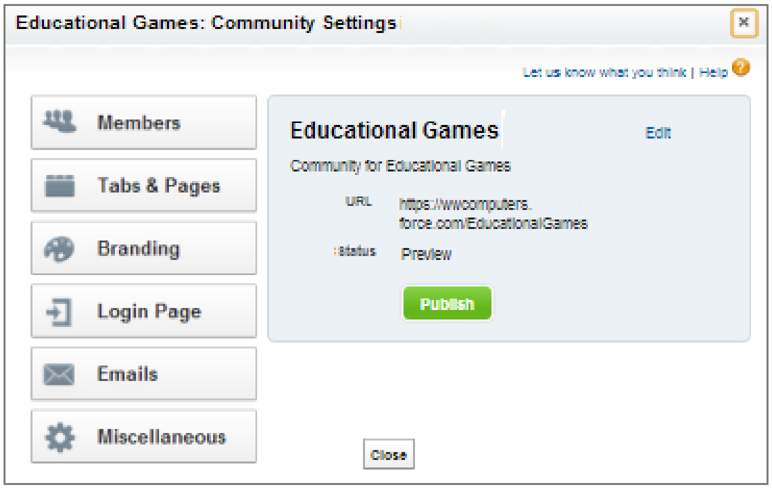
The final setup option on the Manage Communities page is optional. Chatter has to be enabled to use these settings.

The Communities Miscellaneous settings allows you to change Chatter messages, knowledgeable people, and content flagging setting. Select the following options for Chatter:

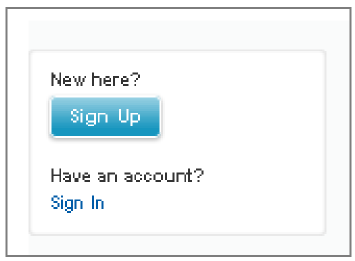
- Allow members to flag items.
- Enable Chatter messages, which allow you to have secure private conversations with other Chatter users. To expose Chatter messages for external users, administrators must also enable the Chatter tab.
- Enable knowledgeable people on topics.

Take It for a Spin!

You've just created a community that showcases all of the goodness of the Service Cloud's self-service features. Let's see what we've created and log in! You can find the URL for the community back on the first page of the Community Setup page. Click **Customize** > **Communities** > **All Communities**, then click **Edit** next to the Educational Games community name.



You can use that URL to navigate to the community and log in as a new user.



A few things you can check out:

- Self-register as a new user and check to see that they've been created as a user and have access to the community.
- Use your own email address when you create a fictitious user and make sure that you get email messages from the community.
- Create a few questions to make sure that you can ask a private question to a service agent.
- Log in as a service agent and ensure that you can see cases in the feed.

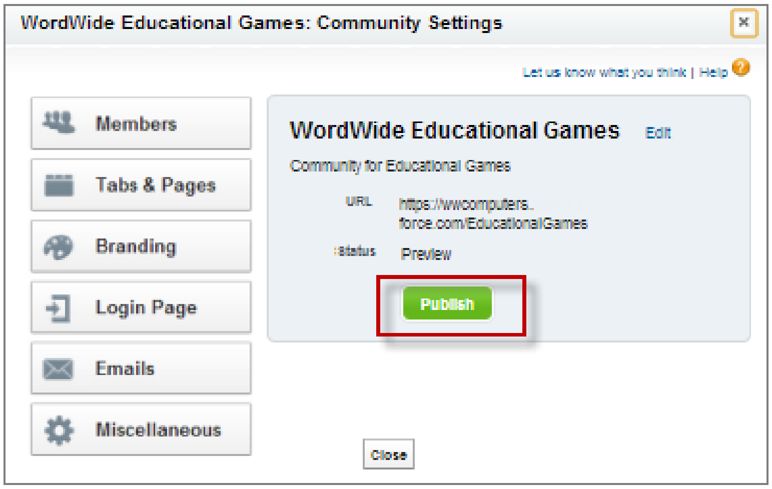
If you want to change tab order or branding, you can go back to the Communities setup pages and make your final tweaks. Be sure to finish all major customizations while in Preview status. If you're happy, then all we have to do is publish our community!

...And Publish!

Success! You've added any finishing touches and the community is ready for prime time! It's time for your final task.

Here it is:

1. From Setup, click **Customize** > **Communities** > **All Communities** and click **Edit** next to Educational Games.
2. Click **Publish**.



And with a click of a button, welcoming emails are sent to any users you've already added to the community and your community is online and available to your customers. Just like that!

Publishing a community makes it visible to members. If you want to customize it further after publishing, you can do so while the community is published or take the community offline. Keep in mind that once you publish, everything in the community is visible to members. If welcome emails are enabled, an email with a link to the community is sent to each member when the community is published. For any members from outside the company who don't have a password or use single sign-on, the welcome email includes a link to set their password and security question.

MOVING FROM PORTALS TO COMMUNITIES

Making the Jump from a Customer Portal to a Community

Your migration from portals to communities doesn't have to be difficult! Almost all of your current functionality in portals will work in a community.

You can move a subset of your portal users and take a metered approach at moving from a portal to a community. Once you've created your community, it's easy to get all of your customers moved over from your existing portal. All you need to do is move your existing licenses and user profiles to a new community.

But why should you move from your existing portal to a new community? Communities extend the value of portals. Communities provide exciting new features that weren't previously available to portal users, such as:

- Use of Site.com to create branded public and private pages
- Chatter inside of communities, including:
  - Public and private groups
  - File sharing
  - Topics and recommendations
  - Social profile
  - Chatter REST API
  - Private tasks for partner and customer community users
  - Customizable email settings and templates
- Management of community members using permission sets
- Single sign-on for internal and external users, and support for multiple identity providers
- Support for login through multiple authorization providers (Salesforce, Facebook©, Janrain©)
- Mobile access using Salesforce1

Test your community while your portal is still active. After setting up a community, you can continue to use your partner portal or Customer Portal. Changes to community settings are completely separate from portal settings and have no impact on your existing portal setup.

Salesforce has created a great tipsheet to answer your questions. Look for "Migrating From Portals to Communities" in Salesforce help to get all of the latest information on your move!

Tips for Migrating

Migrating your partner portal or Customer Portal users to a community requires performing typical community setup as outlined in *Getting Started With Salesforce Communities*.

These tips will help you migrate some of your existing portal settings into your community.

Migrating Existing Visualforce or Apex Pages

If you have Visualforce or Apex pages that you want to use in your community, make sure the paths are updated with the correct URL for the community. To get the correct community URL in Visualforce pages, use `{!$Site.CurrentSiteUrl}`. To get the correct URL in Apex pages, use `Site.getCurrentSiteUrl()`. Additionally, if you have or are building Visualforce pages and only want to return the community prefix, you can use `{!Site.Prefix}`. To get these values on a Visualforce page with an Apex controller, use `Site.getCurrentSiteUrl()` or `Site.getPrefix()`.

Updating Apex Triggers so That They're Community Aware

If your organization has Apex triggers on Chatter posts or comments, when you enable Communities the triggers will automatically apply to all communities created within your organization. If you want the triggers to apply to a certain community or your internal organization only, you must update the trigger with code that returns the community ID. For example, if you only want the triggers to apply to your internal organization, add the following code before your logic:

```
//for logic applicable only in the internal org
if (Network.getNetworkId() == null) {
```

Allowing Self-Registration in Your Community

Select **Allow external users to self-register** when editing the Login & Registration page options for your community.

For complete instructions, see "Set Up Self-Registration for Your Community" in *Getting Started With Salesforce Communities*.

Tips for Enabling Chatter Answers or Ideas in Your Community

If you're using Chatter Answers or Ideas:

1. Edit the Zone you want to use in your community.
2. Change the Visibility Setting from "Portal" to "Community".
3. Select the community that the Zone should appear in.
4. Edit your community setup and expose the Q&A and/or Ideas tabs.
5. Ensure that the appropriate profiles have access to the tab.

Directing External Users to Your Community Login Page

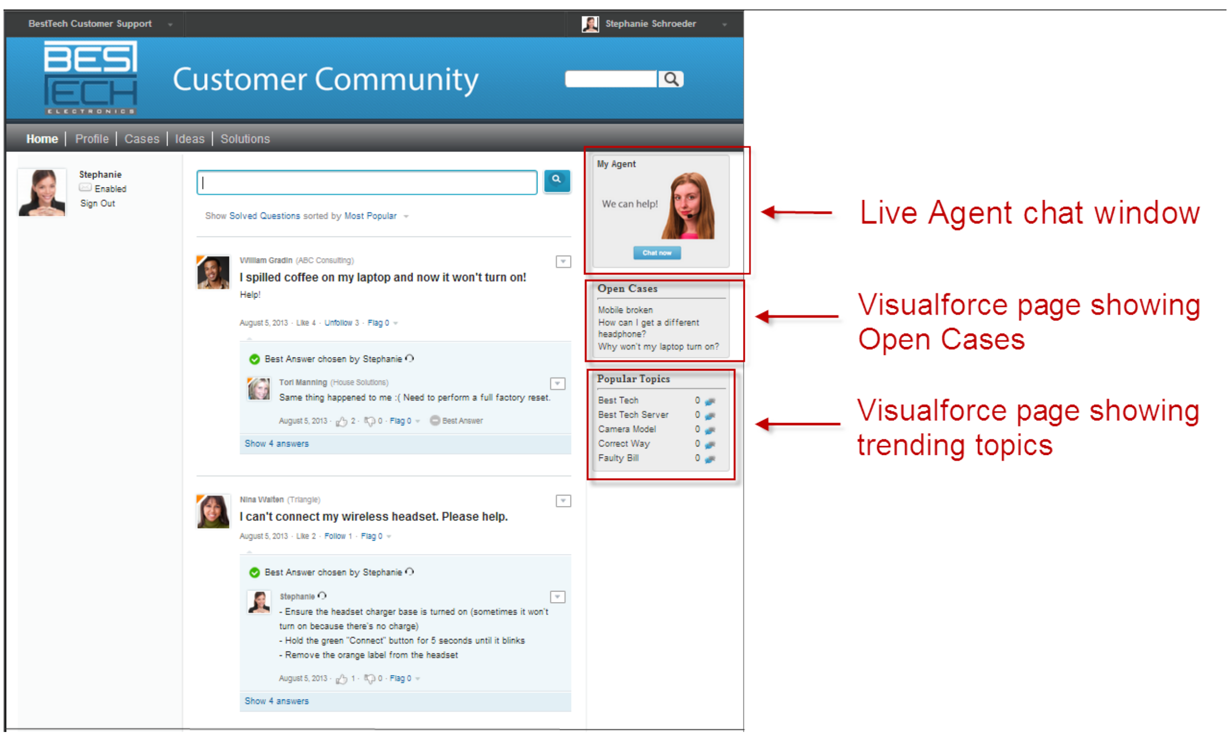
Direct external users to your new community login page by either:

- Implementing a simple Javascript redirect on the `onload()` event in the login page header
- Inserting an HTML message in the login page header with a redirect to the new login page

ADDING EXTRA CUSTOMIZATIONS

The Fancy Stuff: Additional Ways to Customize Your Community

So you've mastered the basics of setting up a great community. Are you ready for the next steps? You can customize your community beyond what you get out-of-the-box. The options are practically unlimited for you to enhance your members community experience. We've listed just a few options here, but the Salesforce help has tons of great information that will guide you through more advanced customization options.



Use Site.com to Customize Your Community

Each community has one associated Site.com site that lets you add custom, branded pages to your community. Aimed at less technical users, Site.com is a Web content management system (CMS) that provides an intuitive drag-and-drop environment to customize your community's pages. Site.com makes it easy to build dynamic, data-driven Web pages quickly and edit your content in real time. There's no code required (although you can add custom code if you need to) but familiarity with CSS and HTML helps.

Canvas

Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

Add Visualforce Pages

Salesforce development framework allows for deep customization capabilities. You can add all kinds of custom Visualforce pages to your page layout and display topics, cases—whatever adds value for your community members.

Enable Single Sign-On or External Authentication Providers

If your organization uses an existing single sign-on capability to simplify and standardize your user authentication, you can extend this capability to communities. You can set up SAML settings for single sign-on, which enables login to Salesforce using your corporate identity provider as well as an Identity Provider Login URL. You can also enable the option to log in using external service providers such as Facebook©, Janrain©, or Salesforce.

Configure a Public Force.com Site for Chatter Answers

You can display Chatter Answers in an unauthenticated Force.com site that lets users browse articles and questions and answers—only requiring them to log in when they want to post a question. Once you've set up Chatter Answers you can add a Visualforce page with the different components that you want to expose publicly.

Include Live Agent and Chat with Customers

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. To add live agent to your community, copy and paste your Live Agent Deployment Code and Button Code into your community page and adjust the branding and styling to match the look and feel of your community.

Build Quick Actions for New Cases

Actions in Case Feed let support agents perform tasks like emailing customers, writing case notes, and changing the status of a case. Using Visualforce pages, you can create custom actions that offer agents more functionality.

Here are some examples of custom actions:

- A Case Comment action that lets agents write comments that are longer than the standard 1,000 characters for case notes.
- A Map and Local Search action that lets agents look up the customer's location and find nearby service centers.
- An Entitlements action that shows the service level agreement (SLA) status—such as past due, on time, or time to milestone—on a case and lets agents mark milestones as complete.

You can use any Visualforce page that uses the standard case controller as a custom action.