Set Up and Manage Salesforce Communities

Salesforce, Spring '16

@salesforcedocs

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CONTENTS

SET UP AND MANAGE SALESFORCE COMMUNITIES

Salesforce Communities Overview

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

Communities are a great way to share information and collaborate with people outside your company who are key to your business processes, such as customers or partners.

You can use Communities to:

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

EDITIONS

Available in: Salesforce Classic

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

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

Communities can be based on standard Salesforce functionality and tabs, or one of our preconfigured templates. Communities may contain a subset of features and data available in your internal Salesforce organization and can be customized to use your company branding. In addition, you can choose which members from your company and which customers, partners, or other people outside your company can join.

Communities live inside your organization and are easily accessed from a drop-down menu in the top left corner of Salesforce or in the Salesforce1 Mobile Browser App. Use this menu to switch between your communities and your internal Salesforce organization.

SEE ALSO:

Planning Ahead
Enable Salesforce Communities
Create Communities
Manage Your Community

Plan Your Implementation

Planning Ahead

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

- Determine the business requirements of the community. What types of users are you creating the community for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or marketing.
- Estimate the size of the community. This will help determine your licensing requirements.
- Decide if you want your community content to be publicly available to guest users without licenses

- Plan the look-and-feel of your community and then evaluate the available customization options. With Communities, you have the following choices:
  - **Use Visualforce to customize the out-of-the-box community tabs**: Communities comes with some out-of-the-box branding themes that you can use along with standard Salesforce tabs in your community. In addition, you can use Visualforce to extensively customize your community's appearance and leverage all the capabilities of the Force.com platform. This option requires programming capabilities.
  - **Use Community Builder with templates**: Community Builder comes with rich, stylized templates for communities targeted at customer support scenarios. Templates offer easy customization via an intuitive GUI and allow for a quick rollout of your community with minimal configuration in Site.com. This option doesn't require programming experience or knowledge of the Force.com platform. Need help deciding on a template? Check out the template comparison.

  For more information about these options, see Choosing Between Community Builder and Force.com Sites
- Determine if any of the community limits will affect your implementation.

Set Up and Maintain Your Community

Enable Salesforce Communities

Enabling Salesforce Communities is the first step to creating communities.

Enabling Communities enables the Salesforce Classic 2010 user interface theme, which updates the look and feel of Salesforce.

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Communities:
- "Customize Application"

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

If your organization's access to Communities is suspended for non-payment of fees due, all of your communities are deactivated, including those in `Preview` status. When Communities is enabled again, all communities are in `Inactive` status. You can activate these communities, but can't return them to `Preview` status.

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

   Note: If you don't see this menu, Communities may not be enabled for your organization. Contact your Salesforce account executive.

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

   We suggest that you 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. For example, if your domain is `UniversalTelco.force.com` and you're creating a customer community, you can designate the URL as `UniversalTelco.force.com/customers`.

   Important: Keep in mind that you can't change the domain name after you save it.

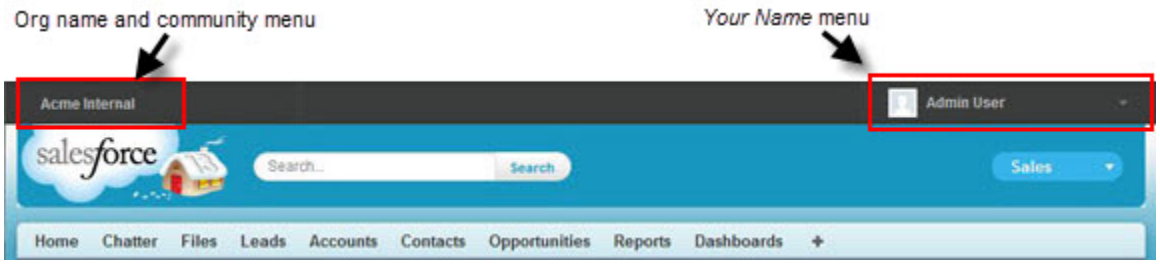
   You can designate a completely custom domain by entering it in on the Domain Management page. From Setup, enter *`Domains`* in the `Quick Find` box, then select **Domains**.

4. Click **Save**.

You can now create communities.

The "Create and Set Up Communities" permission is required to create and customize communities. It also gives the user the ability to manage the Site.com site associated with the community.

After enabling Communities, we recommend that you give the "View Global Header" permission to internal users who need access to the community. The global header allows users to easily switch between their internal organization and any communities they're a member of. If your organization is using Lightning Experience, users with the appropriate permission can switch between Salesforce Classic and the new interface using the Switcher. Look for the `Switch to Lightning Experience` link in the *`Your Name`* menu. Communities aren't supported in Lightning Experience, so to create, manage, or access communities from the global header, you'll have to switch back to Salesforce Classic.



It also displays an extra menu in Community Management for administrators and community managers that they can use to switch between Community Management, Community Builder, Force.com, and Site.com Studio.

SEE ALSO:

Getting Started With Salesforce Communities

Who Can See What in Communities

Update Org-Wide Community Settings

Set the Default Number of Community Roles

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

If your community is set up with Partner Community or Customer Community Plus user licenses, these settings apply. By setting the number of roles, you can limit the number of unused roles. The limit is three roles; the system default is one.

For example, if three partner roles are currently created when an account is enabled for your community–Executive, Manager, and User–but you need only the User role for new accounts, you can reduce the number to one role. For better performance, we recommend setting this value to `1`. You can then use Super User Access to grant specific users access to data owned by other users in their account.

To set the number of roles:

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

The number of roles for existing accounts isn't affected by this setting.

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set the number of default roles:

- "Customize Application"

SEE ALSO:

Create Communities Users

Enable Super User Access in Communities

Enable super user access so that partner users in communities can access additional records and data.

If your community is set up with Partner Community user licenses, this setting applies. You can also grant super user access to users with Customer Community Plus licenses. For more information, see Grant Super User Access to Customer Users in Your Community on page 14.

Granting super user access to external users in your community lets them access additional data and records, regardless of sharing rules and organization-wide defaults. Super users have access to data owned by other partner users belonging to the same account who have the same role or a role below them in the role hierarchy. Super user access applies to cases, leads, custom objects, and opportunities only, but external users have access to these objects only if you exposed them using profiles or sharing and added the tabs to the community during setup.

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

You can now assign super user access.

To disable super user access, deselect `Enable Partner Super User Access`. If you re-enable this feature, all users who were assigned super user access before the feature was disabled will automatically get super user access again.

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Super User Access:
- "Customize Application"

SEE ALSO:

Create Communities Users

Enable Report Options for External Users

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

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

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

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable report options for external users:
- "Customize Application"

Sharing Set Overview

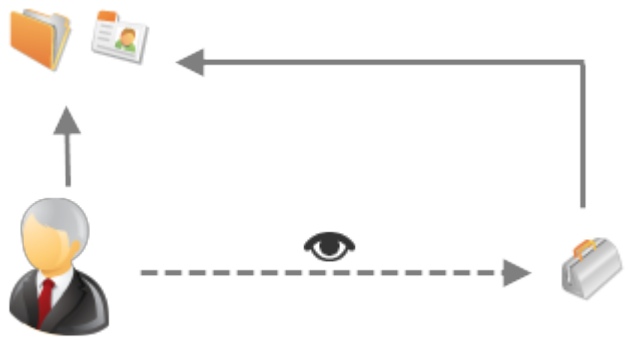
Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

Previously, a sharing set granted access to any record that has a lookup field to an account or contact that matches the user's account or contact. With Spring '14, you can also determine how access is granted using an access mapping in the sharing set, which supports indirect lookups from the user and target record to the account or contact. You can determine the objects to use in the access mapping, and they must both either point to an account or contact.

EDITIONS

Available in: Salesforce Classic

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



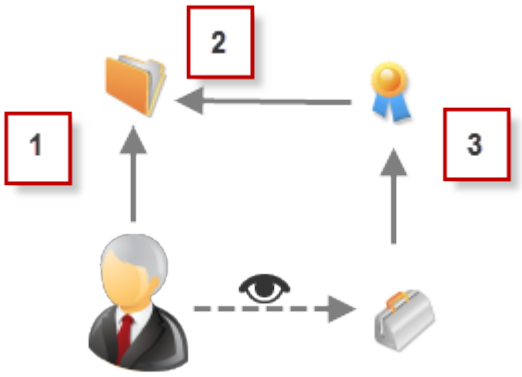
For example, you might want to use a sharing set if you would like to:

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

You can use sharing sets to grant access to accounts, contacts, cases, service contracts, users, and custom objects. Sharing sets can be used with these user profiles:

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

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



Example:

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

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

SEE ALSO:

About High-Volume Community Users

Grant High-Volume Community Users Access to Records

Share Records Owned By High-Volume Community Users

About High-Volume Community Users

High-volume community users are limited-access users intended for organizations with many thousands to millions of communities users.

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

EDITIONS

Available in: Salesforce Classic

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

Characteristics

High-volume community users:

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

Access to Records

High-volume community users can access records if any of the following conditions are met:

- They have "Update" access on the account they belong to.
- They own the record.
- They can access a record's parent, and the organization-wide sharing setting for that record is Controlled by Parent.

- The organization-wide sharing setting for the object is Public Read Only or Public Read/Write.

Administrators can create sharing sets to grant high-volume community users additional access to records; see Grant High-Volume Community Users Access to Records.

Limitations

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

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

SEE ALSO:

Share Records Owned By High-Volume Community Users

Grant High-Volume Community Users Access to Records

Grant high-volume community users access to records using sharing sets.

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

Sharing sets apply across all communities a high-volume community user is a member of. High-volume community users have either the Customer Community or High-Volume Portal User license. For more information, see "Sharing Set Overview" in the Salesforce Help.

To grant users access to selected users in the same community, you would typically create a sharing set if you deselected the `Community User Visibility` checkbox on the Sharing Settings page.

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

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To grant high-volume community users access to records:
- "Customize Application"

5. Select the profiles of the users to whom you want to provide access.
6. Select the objects you want to grant access to.

   The Available Objects list excludes:

   - Objects with an organization-wide sharing setting of Public Read/Write
   - Custom objects that don't have an account or contact lookup field
7. In the Configure Access section, click **Set Up** or **Edit** next to an object name to configure access for the selected profiles, or click **Del** to remove access settings for an object.

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

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

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

   Note: Both selected fields must point to either an account or contact. For example, `Contact.Account` and `Entitlement.Account` both point to an account.
9. Choose an access level of Read Only or Read/Write. (If the object's organization-wide sharing setting is Public Read Only, then only Read/Write is available.)
10. Click **Update**, then click **Save**.

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

SEE ALSO:

About High-Volume Community Users

Share Records Owned By High-Volume Community Users

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

High-volume users are limited-access users intended for organizations with many thousands to millions of external users. Unlike other external users, high-volume users don't have roles, which eliminates performance issues associated with role hierarchy calculations. Because high-volume community users are not in the role hierarchy while Salesforce users are, a *share group* allows you to specify the Salesforce other external users who can access records owned by high-volume community users.

Share groups apply across communities.

To set up share groups for your communities:

1. From Setup, enter *`Communities Settings`* in the `Quick Find` box, then select **Communities Settings**.
2. In the Sharing Settings for High-Volume Community Users related list, click **Edit** next to an existing sharing set.
3. Click the Share Group Settings tab.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

- "Customize Application"

4. Click **Activate** to turn on the share group.

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

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

5. Click **Edit** to add users to the share group. You can add both internal users from your organization as well as external users from the same parent account as the high-volume user.

   a. From the `Search` drop-down list, select the type of member to add.

   b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.

   c. Select members from the Available Members box, and click **Add** to add them to the group.

   d. Click **Save**.

SEE ALSO:

About High-Volume Community Users

Grant High-Volume Community Users Access to Records

Community Setup Basics

Create Communities Users

To allow an external user to access your community, enable the user's contact record as a customer user or partner user, depending on the user's license type. Your community can contain users with Partner Community, Customer Community, and Customer Community Plus licenses.

If your organization has person accounts, you can't use them as partner accounts or create partner users that are associated with them. You can use only business accounts as partner accounts.

1. To create partner users:

a. View the external account you want to create a user for.

b. Create a contact. Click **New Contact** from the Contacts related list. Fill in the appropriate details, then click **Save**.

Note: A non-partner account can't own a partner contact.

Person accounts can't own partner users.

c. On the contact detail page, click **Manage External User**, then **Enable Partner User**.

Note: If you don't see the **Enable Partner User** button, ask your administrator to check whether it's included in the Contact page layout.

d. Edit the user record for this external user.

- Select the Partner Community user license.
- Select the appropriate profile. Remember that profiles give users access to tabs in your community, so be sure that you choose a profile that has the appropriate tabs exposed.

  Note: The available profiles for external users are limited to the Partner Community User profile or profiles cloned from it. Unlike a standard user, the partner user role is automatically assigned based on the account name. The partner user role is a subordinate of the account owner's role. Therefore, all data for the partner user role rolls up to the partner account owner's role. If you disable a partner user, the partner user role becomes obsolete, and the data no longer rolls up to the partner account role.

- Deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated. When you activate the community, the user receives a welcome email with the login information, as long as the `Send welcome email` option is selected for the community.

  Note: If you select this option but your organization doesn't have `Active` communities that the user is a member of, Salesforce doesn't send the email.

  If `Send welcome email` is disabled for your community, the user doesn't receive an email with the username and password. You must manually send the information.

e. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create partner users:
- "Manage External Users"

To create customer users:
- "Manage External Users"

  OR

  "Edit Self-Service Users"

  Important: When creating customer users, the account that the new contact is associated with must have an account owner that is assigned a role.

To log in as an external user:
- "Manage Users"

  AND

  "Edit" on Accounts

Note: Creating an external user with a Customer Community Plus license is similar to creating a partner user. On the contact record, select **Manage External User**, then **Enable Partner User**. Also, when editing the user record, you select the Partner Community User profile or a profile cloned from it.

2. To create customer users:
   a. Create a contact.
   b. On the contact detail page, click **Manage External User**, then **Enable Customer User**.

      Note: If you don't see the **Enable Customer User** button, ask your administrator to check whether it's included in the Contact page layout.

   c. Edit the user record for this external user.
      - Select the appropriate profile. The available profiles are limited to the Customer Community User profile and any profiles cloned from it.

        Remember that profiles give users access to tabs in your community, so be sure that you choose a profile that has the appropriate tabs exposed.
      - Deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated. When you activate the community, the user receives a welcome email with the login information, as long as the `Send welcome email` option is selected for the community.

        Note: If you select this option but your organization doesn't have `Active` communities that the user is a member of, Salesforce doesn't send the email.

        If `Send welcome email` is disabled for your community, the user doesn't receive an email with the username and password. You must manually send the information.

   d. Click **Save**.

   Note: Customer Users don't see the Notes & Attachments related list on accounts or contacts.

To troubleshoot issues or ensure that the community is configured appropriately, on the contact detail page, click **Manage External User** and choose **Log in As Partner User** or **Log in as Customer User**. You must have Edit permission on Accounts to log in as a Partner User or Customer User. A new browser window opens and you are logged in to the community on behalf of the external user.

When you log in as an external user, you see the behavior that the external user sees. For instance, external users only see the community drop-down menu if they have access to more than one `Active` community. Also, if an external user who is only a member of one `Active` community is given the URL for `Preview` community, the user doesn't see the drop-down menu when in the `Preview` community.

Note: As a security measure, when administrators are logged in as another user, they can't authorize OAuth data access for that user. For example, admins can't authorize OAuth access to user accounts, including single sign-on to third-party applications.

Consider the following when creating external users.

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

SEE ALSO:

Delegate External User Administration

Add Members to Your Community

How do external community members get login information?

Reset An External User's Password for Communities

Delegate External User Administration

You can delegate user administration to external users so that they can decide who should access the community.

External users who are delegated administrators can:

- Create external users
- Edit external users
- Reset passwords for external users
- Deactivate existing external users

You can grant delegated external user administration rights to users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, and Customer Portal Manager licenses.

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles** and click a custom profile.

   You can't edit standard profiles.

   You can add `Delegated External User Administrator` to a permission set that you assign to a standard profile.

2. Click **Edit**.
3. Select `Delegated External User Administrator`.
4. Click **Save**.
5. Click **Edit** in the Delegated External User Profiles related list.
6. Select the profiles you want users with this profile to be able to administer.
7. Click **Save**.

Consider the following when setting up delegated external user administration.

- You can also grant delegated administration rights using permission sets.
- On the profile you're granting delegated administration rights to:
  - Add the "Create" and "Edit" permissions on contacts so that delegated administrators can create and update contacts related to their account.
  - Set the Accounts and Contacts tab settings to Default On so that delegated administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- Add the Accounts and Contacts tabs to your community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage external users:
- "Manage External Users"

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

- Set field level security and page layouts so that delegated external user administrators can access only the account and contact fields you specify.

SEE ALSO:

Create Communities Users

Grant Super User Access to Partner Users in Your Community

Grant Super User Access to Partner Users in Your Community

Partner Super User Access must be enabled in your Communities Settings before you can grant access to users. Use this information to grant super user access to users with Partner Community licenses. You can also grant super user access to users in your community with Customer Community Plus licenses. To learn more, see Grant Super User Access to Customer Users in Your Community.

Granting super user access to external users in your community lets them access additional data and records, regardless of sharing rules and organization-wide defaults. Super users have access to data owned by other partner users belonging to the same account who have the same role or a role below them in the role hierarchy. Super user access applies to cases, leads, custom objects, and opportunities only, but external users have access to these objects only if you exposed them using profiles or sharing and added the tabs to the community during setup.

1. View the contact record for the user.
2. Click **Manage External Account**, then choose **Enable Super User Access**.
3. Click **OK**.

Grant Super User Access to Customer Users in Your Community

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

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

To grant super user access to users with Partner Community licenses, see Grant Super User Access to Partner Users in Your Community.

The "Portal Super User" permission lets delegated external user administrators do the following for their own account:

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

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

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

Create Communities

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

1. To start creating communities, from Setup, enter `Communities` in the `Quick Find` box, select **All Communities**, then click **New Community**.
   The Community Creation wizard appears, with different template options for you to choose from.
2. Hover over a template to see more information about it.

   Kokua
   A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

   Koa
   A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

   Napili
   A powerful, responsive self-service template that lets users post questions to the community, search for and view articles, and contact support agents by creating cases. Supports Knowledge, Cases, and Questions & Answers.

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

   Salesforce Tabs + Visualforce
   Standard Salesforce structure and tabs that you can customize using Visualforce. Supports most standard objects, custom objects and Salesforce1.
3. Hover over the template you want to use, and then click **Choose**.
4. If you selected Koa or Kokua, specify the categories and Company Name for your template, then click **Next**.

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

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

   Company Name
   This is the name of your company as you want it to appear in the community header.
5. Enter a community name.

   Note: If you're creating multiple communities, keep in mind that community names may be truncated in the global header drop-down menu. Users can see up to 32 characters of the name, and the `Preview` and `Inactive` status indicators count toward that number. Make sure that the visible part of the name is distinctive enough for users to distinguish between multiple communities.

6. Enter a unique value at the end of the URL field.

   This value is appended to the domain you entered when enabling communities to create a unique URL for this community. For example, if your domain is `UniversalTelco.force.com` and you're creating a customer community, you can designate the URL as `UniversalTelco.force.com/customers`.

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

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

7. Click **Create Community**.
   The community is created in `Preview` status.
8. On the confirmation page, click **Go to Community Management** to customize your community. If you chose a template other than Salesforce Tabs + Visualforce, you can customize your community in Community Builder.

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

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

SEE ALSO:

Salesforce Communities Overview

Customize Communities

How do I find out how many communities are available in my organization?

Compare Features Available in the Community Templates

Implementation Guide: Using Templates to Build Communities

Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity

How do I find out how many communities are available in my organization?

You can have up to 50 communities in your Salesforce org. Active, inactive, and preview communities, includingForce.com sites, count against this limit.

To see this limit in your org, from Setup enter *`Communities`* in the `Quick Find` box, then select **All Communities**. The `Maximum number of communities` field displays 50.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Create Communities

Create Your Community Using a Preconfigured Template

Create a community and select a template to apply to your community. Define your template and community properties in one place, then use Community Builder to finish designing and organizing your community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:
- "Create and Manage Communities"

To create article types and article actions:
- "Manage Salesforce Knowledge"

To create data categories:
- "Manage Data Categories"

1. From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**, and then click **New Community**.
   The Community Creation wizard appears with different template options for you to choose from.
2. Hover over a template to see more information about it.

   Kokua
   A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

   Koa
   A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

   Napili
   A powerful, responsive self-service template that lets users post questions to the community, search for and view articles, and contact support agents by creating cases. Supports Knowledge, Cases, and Questions & Answers.

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

   Salesforce Tabs + Visualforce
   Standard Salesforce structure and tabs that you can customize using Visualforce. Supports most standard objects, custom objects and Salesforce1. Keep in mind that the Salesforce Tabs + Visualforce template is based on the standard Salesforce tab structure and doesn't work with Community Builder.
3. Hover over the template you want to use, and then click **Choose**.
4. If you selected Koa or Kokua, specify the categories and Company Name for your template.

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

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

   Company Name
   This is the name of your company as you want it to appear in the header.
5. Click **Next**.
6. Enter the name and optional URL for your community.
   Selecting this option automatically updates your community's settings with the URL for the custom pages you create in this step. You can override this login page with another login page in your community's settings. For detailed instructions on creating custom login, logout, and self-registration pages for your community, see *Getting Started with Communities*.

7. Click **Create Community**.
   The community is created in preview status.
8. On the confirmation page, click **Go to Community Management** to customize your community.

   If you selected the Napili template, use Community Management to set the topics that appear in the navigation menu or that feature prominently on your home page.

   Use Community Management to configure community settings such as your default login and registration pages, header and footer, and email templates.

To try out a different template, go back to Community Management and change your template selection. But don't worry—you can always switch back to the first template you chose. To switch back, set the home page back to its original URL in Site Configuration in Site.com Studio.

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

SEE ALSO:

Navigate Community Builder
Brand Your Community with Community Builder
Implementation Guide: Using Templates to Build Communities
Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity
Community Builder Overview
Edit Community Pages and Components in Community Builder
Set Active Pages for Your Community in Community Builder
Manage Your Community's Pages in Community Builder

Customize Communities

USER PERMISSIONS	
To access Community Management:	• "Manage Communities" OR "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access
To customize administration settings or use Community Builder:	• "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access

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

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

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration**, then select the part of the community you want to customize:

   Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable **Show all settings in Community Management**.

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

   Note: To perform advanced customizations, such as adding custom pages or pages that don't require login, from Community Management click the Community Management menu in the global header, then click either **Go to Force.com** or **Go to Site.com Studio** to go to the site associated with this community. If you used the Aloha, Koa, Kokua, or Napili templates, select **Go to Community Builder** to customize the community.
3. To share the community with stakeholders while it's still in Preview status, copy the URL displayed on the **Administration** > **Settings** page and share it.

   This allows you to get their feedback, and take advantage of having early members who can post, comment, and share records so that members enter an active community from their first login.

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

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

Add Members to Your Community

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

Using profiles and permission sets, you can:

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

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

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

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Members**.
3. To add members using profiles:
   a. To filter profiles, select a profile type from the drop-down menu. To search for a specific profile, enter a search term and click **Find**.

      Search returns profiles for the selected filter.

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

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

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

      Important: If you're an administrator and accidentally remove yourself from a community, you won't be able to access the Administration settings in Community Management. To add yourself back to the community or make other membership updates, use the API.
4. To add members using permission sets:
   a. To search for a specific permission set, enter a search term and click **Find**.
   b. Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.
   c. Click **Add**.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

5. Click **Save**.

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

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

There are additional options for granting access to your community:

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

For more information about these additional options, see Customize Login, Logout, and Self-Registration Pages in Your Community.

SEE ALSO:

Customize Communities

Enable the Global Header for Communities

How do I update community membership using the API?

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

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

1. Get the `networkId` for your community.

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

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

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

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

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

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

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

Add Tabs to Your Community

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

Tip: If you want to use all custom pages in your community, you can choose to hide tabs . Not sure which option works best for you? Check out Tabs vs. Community Builder on page 23.

Before you begin, keep these things in mind:

- The tabs you enable should be required for the type of activity you're performing in this community, whether it be sharing accounts and opportunities with your partners or sharing cases and solutions with customers who need support. Don't clutter your community with tabs that users don't need.
- Profiles control access to tabs, so some tabs you choose may be hidden for profiles associated with the community. In that case, you must manually expose the tabs in the profiles for your community members so that they can see the tabs in the community.
- Lightning Component tabs aren't supported in Communities.
- Chatter Free users in your community don't see any tabs except the Chatter tab.

After you identify the features you want your community members to see, you can expose those features by choosing the corresponding tabs during setup. The tabs that you select also determine community navigation in Salesforce1.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Tabs**.

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

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

   If a community member doesn't have access to the landing tab and Chatter is disabled, we show them the Home tab. If Chatter is enabled, we show the Chatter tab.
6. Click **Save**.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

SEE ALSO:

Customize Communities

Rename the Chatter Tab

Tabs vs. Community Builder

Not sure whether to use standard Salesforce tabs or the Community Builder when setting up your community? Here is some more information about each option to help you decide.

Tabs

Selecting the Salesforce Tabs + Visualforce template when creating your community means you will use out-of-the-box Salesforce tabs or Visualforce pages.

Pros

- Some theming options available out-of-the-box for tabs
- Support for all sales, service, marketing, and platform features
- Full Force.com platform capability

Cons

- Visualforce is the preferred approach for better customization, yet Visualforce requires coding capability
- Requires some knowledge of the Force.com platform

Community Builder

Selecting one of the preconfigured templates when creating your community means that you will use the WYSIWYG user interface of the Community Builder.

Pros

- Out-of-box app targeted at self-service communities
- More CSS styles available
- Great for a quick rollout of simple self-service community use case

Cons

- Limited to self-service functionality (cases, Salesforce Knowledge, and Chatter Questions)
- Doesn't support other sales, service, or platform use cases
- Doesn't have full platform capability

SEE ALSO:

Add Tabs to Your Community
Community Builder Overview

Rename the Chatter Tab

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To rename the Chatter tab:

- "Customize Application"

  OR

  "View Setup and Configuration"

  AND

  Be designated as a translator

Brand Your Community

If you are using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Management by adding your company logo, colors, and copyright. This ensures that your community matches your company's branding and is instantly recognizable to your community members.

Important: If you are using a self-service template or choose to use the Community Builder to create custom pages instead of using standard Salesforce tabs, you can use the Community Builder to design your community's branding too.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Branding**.
3. Use the lookups to choose a header and footer for the community.

   The files you're choosing for header and footer must have been previously uploaded to the Documents tab and must be publicly available. The header can be .html, .gif, .jpg, or .png. The footer must be an .html file. The maximum file size for .html files is 100 KB combined. The maximum file size for .gif, .jpg, or .png files is 20 KB. So, if you have a header .html file that is 70 KB and you want to use an .html file for the footer as well, it can only be 30 KB.

   The header you choose replaces the Salesforce logo below the global header. The footer you choose replaces the standard Salesforce copyright and privacy footer.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

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.

   Note that some of the selected colors impact your community login page and how your community looks in Salesforce1 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. Top of the login page. Login page in Salesforce1.
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. Button on the login page.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

SEE ALSO:

Customize Communities

Customize Email Sent from Communities

You can customize email sender information, Chatter email branding, and templates in your community emails. You can perform customizations in either the user interface or the Network object in Salesforce APIs.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Emails**.
3. Enter custom values for the email sender's name and address to replace the default values.

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

   If you enter a custom value for the sender's address and you have enabled mail relay, your Chatter emails will use the relay.
4. Customize what displays in the footer of Chatter emails.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

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

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

a. Choose a logo to replace the default Chatter logo.

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

b. Enter custom text to replace the default footer text, up to a maximum of 1,000 characters.

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

5. Select `Send welcome email` to send email to users when they're added to the community.

Important: Welcome emails contain login information for external members. If you don't select this option, you'll have to manually send external members their usernames and passwords.

The link provided in the welcome email is valid for 6 months.

Welcome emails are sent when:

- A community changes from `Preview` status to `Active` status. Emails are not sent when a community is in `Preview` or `Inactive` status.
- An administrator adds a new profile or permission set to a `Active` community.
- A user is assigned a profile or permission set that is part of a `Active` 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. The first email contains login credentials, but emails from subsequent communities simply contain a link to the community.

6. Use the default email templates or use the lookups to select different templates for welcome emails to new community members, forgotten password emails, and notification emails about reset passwords. If your organization uses email templates to submit case comments, you can select a template (none is provided by default).

User-initiated password reset links expire in 24 hours. Administrator-initiated password reset links don't expire. You can customize any default template.

Note: If you customize the contents of an email template, we recommend that you use the `{!Community_Url}` merge field. This custom merge field populates the unique URL for a community, ensuring that emails to users contain URLs with the correct parameters and direct users to the appropriate community to log in or change a password.

7. Click **Save**.

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

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

- `CaseCommentEmailTemplateId`—ID of the email template used when submitting a comment on a case.
- `ChangePasswordEmailTemplateId`—ID of the email template used when notifying a user that their password has been reset.

- `EmailFooterLogoId`—ID of the Document object that displays as an image in the footer of community Chatter emails.
- `EmailFooterText`—Text that displays in the footer of community Chatter emails.
- `EmailSenderAddress`—Read only. Email address from which community emails are sent.
- `EmailSenderName`—Name from which community emails are sent.
- `ForgotPasswordEmailTemplateId`—ID of the email template used when a user forgets their password.
- `NewSenderAddress`—Email address that has been entered as the new value for `EmailSenderAddress` but has not been verified yet. After a user has requested to change the sender email address and has successfully responded to the verification email, the `NewSenderAddress` value overwrites the value in `EmailSenderAddress`. This becomes the email address from which community emails are sent.
  - If verification is pending for a new email address and you set `NewSenderAddress` to null, this cancels the verification request.
  - `NewSenderAddress` is automatically set to null after `EmailSenderAddress` has been set to the new verified address.
  - If verification is pending for a new email address and you specify a different new address for this field, only the latest value is retained and used for verification.
- `OptionsSendWelcomeEmail`—Determines whether a welcome email is sent when a new user is added to the community.
- `WelcomeEmailTemplateId`—ID of the email template used when sending welcome emails to new community members.

SEE ALSO:

Merge Fields for Communities

Customize Communities

Merge Fields for Communities

You can add merge fields to Communities email templates.

When you enable Salesforce Communities in your organization, three text-based email templates are created:

- Communities: Changed Password Email
- Communities: Forgot Password Email
- Communities: New Member Welcome Email

These templates use unique merge fields. These merge fields are not available to select and copy when editing a template, but you can enter them manually. These merge fields will only work properly if used in a text or HTML template selected for a community.

EDITIONS

Available in: Salesforce Classic

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

Field Name	Description
`{!Community_Name}`	The name of the community, as entered during community creation.
`{!Community_Url}`	The URL to the login page of a community. For instance, https://acme.force.com/partners/login. If this merge field is part of the welcome email being sent to a new external user, the URL is appended with a link to a reset password page. This field is populated only if:

Field Name	Description
	• The template containing this field is selected as the Welcome New Member template for a community, and Send welcome email is selected, OR • The template containing this field is selected as either the Forgot Password or Change Password template and the user receiving the email is an external user who is a member of the community.
`{!Receiving_User.Username}`	The user name of the user who will receive the welcome email.

You can create custom email templates for communities using Visualforce, which allows you to use custom company branding in your email templates. For Visualforce email template, use the `$Network` global merge field type and its properties, as described in this table.

Field Name	Description
`$Network.Name`	The name of the community, as entered during community creation.
`$Network.NetworkUrlForUserEmails`	The URL to the login page of a community. For instance, https://acme.force.com/partners/login. If this merge field is part of the welcome email being sent to a new external user, the URL is appended with a link to a reset password page. This field is populated only if it is used in a Visualforce email template for one of three email types supported for Communities.

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

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

To find out if your email templates use these merge fields, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**, then click **Edit** next to any email template.

SEE ALSO:

Customize Email Sent from Communities

Enable Community Preferences

Customize Communities Preferences

Enable or disable nickname display, access to the community without login, Chatter private messages, content flagging, reputation levels, knowledgeable people, and file limits in your community.

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**.
3. Change the desired settings.

   General

   - Display nicknames instead of full names in your community. Enabling nickname display in your community allows more privacy and protects member identities. This is especially helpful in a public community where unregistered visitors can access member profiles.
   - Enable access to public content in your community so that guest users can access it without logging in. Allowing this access is a way to boost adoption and helps customers easily find information they need without having to log in, register, or contact your company directly.
   - 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.
   - Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.
   - Show all settings available in Community Management that are hidden by default based on how you set up your community. Enabling this setting overrides the dynamic navigation provided in Community Management.

   Community Management

   - Allow members to flag posts, comments, or files for moderation within your community. Members may want to flag items that contain inappropriate language or sensitive information.
   - Enable Reputation to allow community managers to set up a point system that rewards users who participate in the community. Administrators set up corresponding reputation levels that users see on their profile.
   - Enable knowledgeable people so you can discover who's knowledgeable on topics and endorse people for their knowledge on a topic.

   Files

   - Set the maximum size in MB for files uploaded to the community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

- Specify the types of files that can be uploaded in the community.

4. Click **Save**.

SEE ALSO:

Show Nicknames Instead of Full Names in the Community
Enable Public Access to Community Content
Use Custom Visualforce Error Pages for Authenticated Users
Enable Users to Flag Items in Your Community
Enable Reputation in Your Community
Limit Files in Your Community

Show Nicknames Instead of Full Names in the Community

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

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

1. Access Community Management in either of the following ways.
   - From the community, click in the global header.
   - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**.
3. Select **Enable nickname display**, then click **Save**.

Nicknames are shown in place of first and last names in almost all locations in the community, including in feeds, list views, groups, search results, recommendations, and on user profiles and files. Additionally, Salesforce1 and any community sites activated using community templates show nicknames as well.

A few restrictions to keep in mind about nickname display:

- Private messages display full names. You can choose to turn off private messages to avoid this.
- Records and user lookups on records show full names. Keep in mind, though, that you can control record and user visibility with sharing rules.
- Mobile notifications in Salesforce1 show full names. You can turn off mobile notifications in Salesforce1 to avoid this.
- Searches by first, last, and full names aren't restricted and return matches, but the search results display only nicknames. The auto-complete recommendations in global search and the recent items list show any first, last, and full names that the user has already searched by or has accessed via a record or another location.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable nickname display:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

SEE ALSO:

Customize Communities Preferences

Enable Public Access to Community Content

Enable access to community content for guest users (unlicensed users) without requiring them to log in or register with the community.

Public communities lend themselves well to business-to-consumer (B2C) type scenarios and allow you to reach a broader audience. Consider the example of a customer support community maintained by a sports equipment manufacturer. A community with public discussions, questions, known issues, and solutions posted by customer support would allow existing and potential customers to view this information without contacting the company directly.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**.
3. Select **Allow access without login**, then click **Save**.

Enabling public access allows you to expose groups, topics, user profiles, and feeds for guest users via Chatter in Apex, but it doesn't expose this data in the community. To allow guest users to view this information, do one of the following:

- Use a community template from the Community Builder that allows guest user access for one or more of these objects (Napili, for example). See the *Community Templates for Self-Service Implementation Guide* for detailed instructions.
- Use the Chatter in Apex methods and Visualforce pages to expose these objects to guest users. See "Methods Available to Communities Guest Users" in the *Force.com Apex Code Developer's Guide* and the *Visualforce Developer's Guide* for more information.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable public access to community content:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Note:

- If you have enabled profile-based rollout for Chatter in your organization, guest users won't be able to access your public community until you enable Chatter access on the guest user profile. For more information, see *Control Chatter Access through User Profiles* in the Salesforce Help.
- You can't attach files to questions in a public community from Internet Explorer 9.

SEE ALSO:

Customize Communities Preferences

Use Custom Visualforce Error Pages for Authenticated Users

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

To assign or customize your Visualforce error pages, from Community Management, click the Community Management menu in the global header and select **Go to Force.com**. The **Error Pages** section lists your current page selections.

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**.
3. Select **Use custom Visualforce error pages**, then click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Limit Files in Your Community

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

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

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from Salesforce1. You can also set community file limits using the SOAP API or Metadata API.

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

Keep the following things in mind:

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To limit the files in your community:
- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

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

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

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

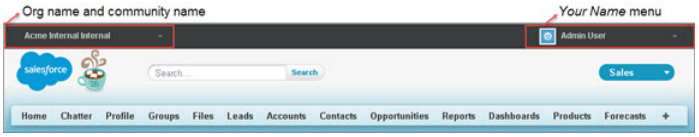
SEE ALSO:

Customize Communities Preferences

Enable the Global Header for Communities

When Communities is enabled, the global header allows you to easily switch between your communities and your internal organization.

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



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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

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

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

The *Your Name* menu on the right side contains links to edit contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features. If your organization is using Lightning Experience, users with the appropriate permission can switch between Salesforce Classic and the new interface using the Switcher. Look for the `Switch to Lightning Experience` link in the *Your Name* menu. Communities aren't supported in Lightning Experience, so to create, manage, or access communities from the global header, you'll have to switch back to Salesforce Classic.

When in a community, users with either the Manage Communities or the Create and Set Up Communities permission see a gear icon ( ) they can use to switch to Community Management. Within Community Management, they see an additional menu that they can use to preview the community or access the community settings via Community Builder, Site.com Studio, or Force.com.

Note: Within Community Management, users see the global header and the Community Management menu, even if they don't have the "View Global Header" permission. However, we recommend that you still assign the "View Global Header" permission to users who need to switch between your internal organization and communities.

SEE ALSO:

Navigate to Your Communities

Share a Link to Your Community

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

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

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Settings**.
3. Copy the URL displayed on the page and share it with your stakeholders.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To share a preview URL for your community:
- "Create and Set Up Communities"

SEE ALSO:

Customize Communities

Communities Statuses

Make Your Communities Active

Activating a community makes it visible to members. You can customize the community while it's active, or you can deactivate the community to make your changes. Keep in mind that once a community is active, everything in the community is visible to members. Be sure to finish all major customizations while in `Preview` status.

Note: If welcome emails are enabled, an email with a link to the community is sent to each member when you first activate the community. 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.

An external user with access to multiple communities within one organization uses the same login credentials for all communities.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Settings**.
3. Click **Activate Community**.
   Your community is active and online.

SEE ALSO:

Communities Statuses

Customize Communities

Deactivate a Community

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Communities Statuses

Communities can have one of the following statuses.

Status	Description
`Preview`	Customization of the community isn't complete, and the community has never been activated. Once you activate a community, you can't go back to `Preview` status. Users with "Create and Set Up Communities" can access communities in `Preview` status if their profile or permission set is associated with the community. They can also share a link to these communities with users whose profiles or permission sets are associated with the community. The link for sharing a `Preview` community is located on the Community Management page. No welcome emails are sent even if `Send welcome email` is selected. Note: If your organization's access to Communities is suspended for non-payment of fees due, all of your communities are deactivated, including those in `Preview` status. When Communities is enabled again, all

EDITIONS

Available in: Salesforce Classic

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

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

SEE ALSO:

Customize Communities

Make Your Communities Active

Deactivate a Community

Share a Link to Your Community

Update Your Community Settings

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

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Settings**.
3. Edit your community settings as needed:
   - Edit your community name, description, and URL, by clicking ✎ next to your community name.
   - Manage the status of your community.
   - Change your community template.

SEE ALSO:

Change Your Community Template

Communities Statuses

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Deactivate a Community

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

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

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Settings**.
3. Click **Deactivate**.

   Your community is inactive and offline.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

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

SEE ALSO:

Communities Statuses

Make Your Communities Active

Customize Communities

Change Your Community Template

Change your community template if the requirements of your community evolve from when you first set it up.

Tip: You won't lose any data when you change templates, but make sure to review Considerations for Changing Your Community Template before performing the steps below.

If your community is already active and you change templates from a Salesforce Tabs + Visualforce template to a Community Builder-based template, or from a Community Builder-based template to another Community Builder-based template, your template change is saved in a draft version that you can further customize in Community Builder. You must publish your changes in Community Builder before your active community is updated.

If your community is already active and you change templates from a Community Builder-based template to a Salesforce Tabs + Visualforce template, your active community is updated immediately. In this scenario, we recommend that you first deactivate your community. Once you have made all of your changes, you can then re-activate it.

If your template is listed as `None`, this means you're not using a predefined Community Builder-based template or you have modified a Community Builder-based template.

If you are using a Community Builder-based template and you customize your template, the **Settings** page shows the name of template you have in draft mode in Community Builder. A warning message reminds you to publish your changes in Community Builder.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Settings**.
3. Click **Change Template**.
4. Choose a template that meets your community's needs.

   To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

   To learn more about using the Aloha template, see the *Getting Started with the Aloha Community Template for Salesforce Identity*.
5. When prompted, select **Change Template** to confirm your changes.

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

Check to make sure your community pages, such as the Login page or Community Home page, are still the best choice for your updated community template. For example, if you previously had a Salesforce Tabs + Visualforce template and switched to a Community

Builder-based template, you might want to update your pages to use Community Builder pages instead of Visualforce pages. If required, customize your community in Community Builder and publish any changes you make.

Considerations for Changing Your Community Template

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

EDITIONS

Available in: Salesforce Classic

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

- You may need to change your community's template to see some new communities features introduced by Salesforce. If you want to keep your current template, you must switch to another template and then switch back to your current template. For example, let's say you are using the Napili template for your community. Salesforce introduces a feature that requires a change (*not* a simple update) to the template. You must switch your community's template to another template, such as Koa or Kokua, and then switch it back to Napili.
- Salesforce object data carries over, but all branding and component customizations do not. You'll need to redo all customizations.
- Switching between templates updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to a Community Builder template, or vice versus. For example, in Community Builder-based templates `/s` is appended to your URL. Be sure to update any links to your community with the new URL.

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

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

Administrating Communities Users

Reset An External User's Password for Communities

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

In either case, when someone initiates a reset of an external user's password, an email is sent to the user with a link to reset their password. User-initiated password reset links expire in 24 hours. Administrator-initiated password reset links don't expire. When the user clicks the link, they will be required to reset their password before proceeding.

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

SEE ALSO:

Create Communities Users

How do external community members get login information?

How do external community members get login information?

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

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

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Create Communities Users

Reset An External User's Password for Communities

Optional Community Enhancements

Configure a Custom Domain for Your Community

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

Note: Custom domains are supported only in non-sandbox instances. You can configure a custom domain in a sandbox instance and then migrate it to a production instance, but the custom domain is only active in production.

When you add a domain, you also have the option of attaching a certificate and key for connection security. If you're going to use a certificate, make sure you've already added it using Certificate and Key Management before you try to attach it to your domain. Only CA-signed certificates are supported, and they must be 2048 bits in length. To support all domains that are hosted by sites in your organization, use a wildcard or Subject Alternative Name certificate.

1. From Setup, enter `Domains` in the `Quick Find` box, then select **Domains**.
2. Click **Add a Domain**.
3. Enter the Domain Name.
4. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
5. Click **Save**. Alternatively, click **Save & New** to add multiple domains.

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

Before you switch the CNAME of your domain name to point to a new target name, ensure that the new target name exists in the DNS by using `dig` or `nslookup`. When you created your domain names affects the target of your CNAME:

- Domain names that were added before Summer '13, typically need to have their CNAME adjusted to point to the fully qualified domain followed by `.live.siteforce.com` instead of to the organization's `force.com` sub-domain. For example, if your pre-Summer '13 domain is `www.example.com`, then the target of its CNAME will need to be `www.example.com.live.siteforce.com` instead of `example.force.com` before HTTPS will work.
- Domain names that were added in or before Summer '13, don't have the 18-character organization ID in the CNAME target.

USER PERMISSIONS

To view domains:
- "View Setup and Configuration"

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

To edit or delete domains:
- "Customize Application"

To associate certificates with a domain:
- Contact Salesforce if you aren't using Communities. Organization with Communities can associate certificates with a domain.

- Domain names that were added in or after Summer '13, already point to the proper place for setting up HTTPS in a custom domain.
- Domain names that were added in or after Winter '14, use a CNAME that points to the fully qualified domain followed by your organization's 18-character ID and `.live.siteforce.com`. For example, if your domain name is `www.example.com` and your 18-character organization ID is `00dxx0000001ggxeay`, then the target of its CNAME will need to be `www.example.com.00dxx0000001ggxeay.live.siteforce.com`.

Add the Global Search Box to Your Customized Community HTML Header

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

EDITIONS

Available in: Salesforce Classic

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

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

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

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

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

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

Set Up Search Engine Optimization (SEO) for Your Community

Have popular search engines, such as the *Google*™ search engine and the *Bing*® search engine, index your community so that customers, partners, and guest users can easily discover community pages via online searches. SEO can significantly improve discovery for public communities.

There are a few standard files you should know about when setting up SEO for your community:

robots.txt

The `robots.txt` file, a standard file used across the Web for SEO, uses include and exclude rules to inform web spiders and robots about which areas of your community to index. This file gives you complete control over what users can discover via search engines. You can customize the rules to allow your entire community to be indexed, or you can choose specific areas. Once you specify your rules, search engines use the file to index your community pages.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

- "Create and Set Up Communities"

For Salesforce Communities, you must create a Visualforce page to host this information. This file is placed at the root level of your community. Here's an example of a Visualforce page with indexing rules for a community:

```
<apex:page contentType="text/plain">
User-agent: *
Disallow: /   # hides everything from ALL bots
Allow: /<path-prefix-1>/s  # add path you want to open to bots
Allow: /<path-prefix-2>/s  # add path you want to open to bots
Sitemap: http://community_URL>/<sitemap_to_community1>
Sitemap: http://<community_URL>/<sitemap_to_community2>
</apex:page>
```

sitemap.xml

The `sitemap.xml` file contains a list of the URLs of your community. Search engines use this list to find out which pages of your community are available for crawling and indexing. The robots.txt file contains the path to your community's sitemap. The `sitemap.xml` should also be placed at the root level of your community. For more information about creating the `sitemap.xml` file for your community, see this article.

Note: You may have more than one community, each with various sub-paths. Keep in mind that they all share the same file, so be sure your indexing rules account for the pages in all your communities. The Visualforce page with the robots.txt info will need to be within the community that has no sub-path name at all, so at the root level.

1. Create a list of include and exclude rules for the different areas of your community that you want to expose or hide from search engines. Save this information in a text file.
2. In Setup, enter *`Visualforce Pages`* in the `Quick Find` box, then select **Visualforce Pages** and click **New** to create a new Visualforce page. Give it any name; you can even call it `robots`.
3. Paste the list of indexing rules in the Visualforce page. The final contents should look similar to the example above, with more rules as required.
4. Click **Save**.
5. Back on the Community Management page for your community, click **Administration** > **Pages** > **Go to Force.com** and then **Edit** on the Site Details page.
6. In the **Site Robots.txt** field, enter the name of the Visualforce page you just created, or click to search for the file.
7. Click **Save**.
8. Optionally, submit your `sitemap.xml` file directly to search engines. For example, submit the file to Google™ Webmaster Tools and Bing® Webmaster Tools to allow users of those search engines to discover content in your community.

To confirm that the `robots.txt` file is available for robots and spiders, navigate to your community and append `/robots.txt` to the landing page URL. You should see the contents you pasted into the Visualforce page you created earlier. Similarly, append `/sitemap.xml` to your community URL to test if your sitemap is available to search engine spiders and robots.

Login, Self-Registration, and Password Management In Your Community

Customize Login, Logout, and Self-Registration Pages in Your Community

Configure the standard login, logout, password management, and self-registration options for your community, or customize the behavior with Apex and Visualforce or Community Builder (Site.com Studio) pages.

By default, each community comes with default login, password management, and self-registration pages and associated Apex controllers that drive this functionality under the hood. You can use Visualforce, Apex, or Community Builder (Site.com Studio) to create custom branding and change the default behavior:

- Customize the branding of the default login page.
- Customize the login experience by modifying the default login page behavior, using a custom login page, and supporting other authentication providers.
- Redirect users to a different URL on logout.
- Use custom Change Password and Forgot Password pages
- Set up self-registration for unlicensed guest users in your community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Brand Your Community's Login Page

If you selected the Salesforce Tabs + Visualforce template, you can add your company logo and custom footer text to the standard login page that comes out-of-the-box with your community.

The header and page background colors used on the standard login page are inherited from the community's branding color scheme.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration** and make your changes in the Header and Footer section.
3. Upload a logo for the community login page header.

   The file can be .gif, .jpg, or .png. 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. Once created, you can't delete the folder.

   The header logo displays at the top left of the standard login page. It is also used when you access the community in Salesforce1. The header logo doesn't appear on custom login pages.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

4. Enter custom text for the community login page footer, up to a maximum of 120 characters.

   The footer displays at the bottom of the login page. This footer text doesn't display on custom login pages.

5. Click **Save**.

The logo and custom footer text display to all users (internal, external, and unlicensed guest users) on the login page.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Customize the Login Process with Apex

Customize Your Community's Login Experience

Customize the default login process for external users in your community. You can also use a custom Community Builder, Site.com Studio, or Visualforce login page, support multiple authentication providers, and configure single sign-on with any template.

External users are users with Community, Customer Portal, or partner portal licenses.

- The login page you select in Community Management overrides other login page assignments in the Site.com or Force.com site settings.
- If your community uses the Salesforce Tabs + Visualforce template, the login page assigned to the community by default is called `CommunitiesLogin`. Use Visualforce to customize the appearance of this page.
- If your community uses the Napili template, the login page assigned to the community by default is called `login`. Use Community Builder (Site.com Studio) to customize its appearance.
- To update the login behavior for both Visualforce and Community Builder pages, update the `CommunitiesLoginController` Apex controller.
- Custom Community Builder pages must be published before they can be assigned to they community. Remember to modify the `CommunitiesLoginController` Apex controller and the `Site.login()` Apex method to use your custom login page.
- The login options you configure here are valid only for external users. Users from your internal organization must use the link that directs employees to log in with their Salesforce username and password.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration** and make your changes under the Login section.
3. Optionally, choose a custom login page for your community. Select the page type (**Community Builder** or **Visualforce**), enter the name of the page in the search field, and click 🔍. In the search results window, click the name of the page to select it.

   Tip: To revert to the default login page for your community's template, select **Default Page**.

4. Select what credentials external users can log in or register with.

By default, users log in to the community using the default community username and password. If you want to allow them to log in with other credentials, such as their Facebook©, Janrain©, or Salesforce credentials from another organization, select those from the list.

Important: Configure these authentication provider options in advance to be able to use them for community logins. From Setup, enter `Auth. Providers` in the `Quick Find` box, then select **Auth. Providers**.

5. Optionally, allow external users to log in with their SAML single-sign on identity.

   This option is available only if your organization has successfully set up SAML for your community on page 74 including:

   - SAML settings for single sign-on, which enables login to Salesforce using your corporate identity provider. Note that you must enter an Identity Provider Login URL.
   - A custom domain name, which changes the application URLs for all of your pages, including login pages. Contact Support if you need to enable My Domain.

   To offer multiple SAML single sign-on options, enter `Single Sign-On Settings` in the `Quick Find` box, select **Single Sign-On Settings**, and then click **Enable Multiple Configs**. If you already had SAML enabled and you then enable multiple SAML configurations, your existing SAML configuration is automatically converted to work with multiple additional configurations.

   Users see the option to **Log In with Single Sign-On**. If you have enabled multiple SAML single sign-on options, each login button displays labeled with the SAML configuration's `Name` field.

6. Click **Save**.

Note: Renaming or deleting the default login page can cause problems with the default community login flow.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Customize the Login Process with Apex

You can provide community members outside your company with a completely custom login page that reflects your organization's style and branding. Use Visualforce and Apex to either customize the `CommunitiesLogin` page and `CommunitiesLoginController`, or create your own Visualforce page.

To redirect from the default community login page to your custom login page:

1. From Setup, enter `Apex Classes` in the `Quick Find` box, then select **Apex Classes**.
2. Click **Edit** next to `CommunitiesLoginController`.
3. Add the following code:

USER PERMISSIONS

To create and edit Visualforce pages:
- "Customize Application"

To edit Apex classes:
- "Author Apex"

  AND

  "Customize Application"

```
global PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

4. If you created a completely custom login page, replace `SiteLogin` with the name of your Visualforce page.
5. Click **Save**.

6. Click **Edit** next to `CommunitiesLandingController`.
7. Add the following code:

```
public PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

8. If you created a completely custom login page, replace `SiteLogin` with the name of your Visualforce page.
9. Click **Save**.
10. From Setup, enter *`Visualforce Pages`* in the `Quick Find` box, then select **Visualforce Pages**.
11. Click **Edit** next to `CommunitiesLogin`.
12. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

13. Click **Save**.
14. Click **Edit** next to `CommunitiesLanding`.
15. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

16. Click **Save**.

Redirect Community Members to a Custom URL on Logout

Specify the URL that community members should be redirected to when they log out from your community.

When community members log out, they are taken to the community login page by default. You can choose to point them to a different location, such as your company web site for example.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration**.
3. In the Logout section, enter the URL you want to redirect community members to.
4. Click **Save**.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Use Custom Change Password and Forgot Password Pages in Your Community

Use a custom Community Builder or Visualforce page instead of the default Change Password and Forgot Password pages.

The Forgot Password page can be customized in Community Builder or Visualforce. If you want to use a custom Community Builder Forgot Password page, first publish your page in Community Builder.

The Change Password page can only be customized in Visualforce.

1. Access Community Management in either of the following ways.
   - From the community, click in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration**.
3. In the password section, select the Page Type: **Community Builder** or **Visualforce**.
4. Enter the name of the page or leave the field blank to search for all available pages.
5. Click , then click the name of the page in the search results to select it.
6. Click **Save**.

To revert to the default login page for your community's template, select **Default Page** as the page type.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Set Up Self-Registration for Your Community

Enable self-registration to allow unlicensed guest users to join your community. You can choose to save them as contacts under a business account or create a person account for each self-registering user.

When you enable self-registration, these Visualforce pages and Apex controllers are associated with your community.

- `CommunitiesSelfReg` page and `CommunitiesSelfRegController`—Provide the form for partners or customers so they can register with your community. You can modify the `CommunitiesSelfRegController` Apex controller to change the default self-registration process, but it is no longer required starting with the Spring '15 release.

  Note: Apex customizations for the self-registration process take precedence over the defaults specified in Community Management. In organizations created prior to the Spring '15 release, existing Apex customizations for self-registration remain in effect as before.

- `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.

The default self-registration pages and controllers are shared by all of your organization's communities. If you enable self-registration for multiple communities, you must further customize the self-registration experience to direct users to different pages, assign different profiles or permission sets for different communities, and so on.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Note: Renaming or deleting the default self-registration page can cause problems with the default self-registration flow.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration**.
3. In the Registration section, select **Allow external users to self-register**.
4. Optionally, choose a custom self-registration page for your community. Select the page type (**Community Builder** or **Visualforce**), enter the name of the page in the search field, and click 🔍. In the search results window, click the name of the page to select it. To revert to the default self-registration page (`CommunitiesSelfReg`), select **Default Page**.

   Community Builder pages must be published, else they aren't included in the page lookup search results. Remember to modify the self-registration `CommunitiesSelfRegController` and `CommunitiesSelfRegConfirmController` Apex controllers if you use a custom page.
5. Select the default **Profile** to assign to self-registering users.

   Note: You can only select portal profiles that are associated with the community. If a profile is selected as the default for users who self-register, and you remove it from the community, the self-registration `Profile` is automatically reset to *`None`*.
6. Select the business **Account** that you want to assign self-registering users to.

The self-registering user is assigned as a contact of the account you specify. To create a person account (if enabled) for each self-registering user, leave this field blank.

Ensure that the account you use is enabled as a partner. To do so, go to the account, click **Manage External Account**, then click **Enable as Partner**.

7. Click **Save**.

After you set up self-registration, a **Not a member?** link directs external users to the self-registration page from the login page. When a user self-registers to join your community:

- Salesforce creates a new user record with the information they provide on the self-registration page.
- The user is assigned the profile you specified when you set up self-registration.
- The user is associated with a business account or a person account, depending on how you set it up.
- Customer Community Plus and Partner Community licenses require user records to be associated with a role in your organization. If you don't specify a role in the default self-registration profile, Salesforce assigns them the `Worker` role.

Note: Keep in mind that each time a user self-registers, they consume one of your Communities licenses. When setting up your self-registration page, be sure to add some criteria to ensure that 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.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Customize the Community Self-Registration Process with Apex

Create Person Accounts for Self-Registering Users

Create Person Accounts for Self-Registering Users

EDITIONS

Available in: Salesforce Classic

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

If your business deals mostly with individuals, instead of creating them as contacts under a single business account, you can assign each self-registering user to a person account.

Important: You must have Person Accounts enabled in your organization. Only Customer Community and Customer Community Plus licenses support the creation of person accounts.

In Community Management, under **Administration** > **Login & Registration**, enable self-registration and leave the **Account** field blank. Specify a default profile to assign self-registering users to.

Salesforce creates separate person accounts for each self-registering user. Each user is assigned the default profile you specified while setting up self-registration, and a default role. If you don't specify a role, either on the profile or via the self-registration Apex controller, Salesforce assigns the `Worker` role to the self-registering users. You can further customize this functionality by using the self-registration Apex controller (`CommunitiesSelfRegController`), but it's not required.

You can also manually create person accounts and assign them to community users with Customer Community and Customer Community Plus licenses.

Customize the Community Self-Registration Process with Apex

Update the `CommunitiesSelfRegController` to customize the default self-registration process for your community. You can use the same controller for the default self-registration page (`CommunitiesSelfReg`) or a custom Visualforce or Community Builder self-registration page.

You can configure self-registration entirely in Community Management. This customization is recommended only if you want to modify the self-registration behavior beyond the defaults, if you have more then one community in your organization, or if you are using a custom self-registration page.

Note: You can add, edit, or delete Apex using the Salesforce user interface only in a Developer Edition organization, a Salesforce Enterprise Edition trial organization, or sandbox organization. In a Salesforce production organization, you can only make changes to Apex by using the Metadata API `deploy` call, the Force.com IDE, or the Force.com Migration Tool. The Force.com IDE and Force.com Migration Tool are free resources provided by Salesforce to support its users and partners, but are not considered part of our Services for purposes of the Salesforce Master Subscription Agreement.

1. From Setup, enter *`Apex Classes`* in the `Quick Find` box, then select **Apex Classes**.
2. Click **Edit** next to `CommunitiesSelfRegController`.
3. Optionally, enter a value for `ProfileId` to define the type of profile the user should be assigned.

   If you selected a default profile while setting up self-registration in Community Management, the value in the Apex code will override that default.

   Note: Note that regardless of which role you enter for the `roleEnum`, the role for new users will default to `None`. Once a user self-registers, you can update their role on the user detail page.

4. Enter the account ID for the partner or customer account that users who self register should be associated with.

   If you selected a default account while setting up self-registration in Community Management, the value in the Apex code will override that default.

   Ensure that the account you use is enabled as a partner. To do so, go to the account, click **Manage External Account**, then click **Enable as Partner**.

5. If you're enabling self-registration for multiple communities, add code to create appropriate types of users for each community, that is, assigning the correct profile, role, and account ID per community.
6. Click **Save**.
7. Enable access to accounts and contacts for the guest profile. The guest profile is automatically associated with your community's Force.com site.
   a. From Setup, enter *`All Communities`* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
   b. From Community Management click **Administration** > **Pages** > **Go to Force.com.**.
   c. Click **Public Access Settings**.
   d. Click **Edit**.
   e. In the Standard Object Permissions section, select Read and Create next to Accounts and Contacts.
   f. Click **Save**.
   g. In the Enabled Apex Class Access related list, click **Edit**.
   h. Add the `CommunitiesSelfRegController` and click **Save**.
   i. In the Enabled Visualforce Page Access related list, click **Edit**.
   j. Add the `CommunitiesSelfReg` and click **Save**.
8. Optionally, if you want to customize the contents of the default self-registration page, edit the `CommunitiesSelfReg` page.
   a. From Setup, enter *`Visualforce Pages`* in the `Quick Find` box, then select **Visualforce Pages**.
   b. Click **Edit** next to `CommunitiesSelfReg`.

c. Add code to customize the fields required for self-registration or the page's look and feel.

   In the default form, all fields except `Password` are required.

d. Click **Save**.

Once setup is complete, external users who submit the completed self-registration form (including a password) are logged in to the community.

Note: If a user self-registers for a community with Chatter Answers enabled, the Chatter Answers User permission is not automatically set for the user.

If you're using a custom Visualforce self-registration page instead of the default `CommunitiesSelfReg` page, add the following code to `CommunitiesSelfRegController`. Replace *`CommunitiesCustomSelfRegPage`* with the name of the custom self-registration page.Then add this to the first line of code in the `CommunitiesSelfReg` page.

Use Other Salesforce Features In Your Community

Enable Cases for Communities Users

Enable cases for external users so that they have access to and can create cases in your communities.

When you enable cases for external users in your community, you can assign cases to those members. Additionally, external members can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams. External users can't edit case comments, associate assets with cases, or delete cases.

Note: Case comments added by external users in communities are public and can be viewed by any user that can view the case.

1. Add the Cases tab to the list of available tabs in your community.
2. Set tab visibility and "Read," "Create," and "Edit" object permissions. You can either set them on the profile or using a permission set. We recommend using a permission set if you plan to apply these permissions selectively.
   a. If using a profile, such as the Partner Community profile, set the cases tab setting to `Default On` and enable the "Read," "Create," and "Edit" object permissions for cases.
   b. If using a permission set, create a permission set with the following settings for cases:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select "Read," "Create," and "Edit".

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable cases for Communities users:

- "Manage Profiles and Permission Sets"

If case comment notification to contacts is enabled, emails sent to external users include a link to the community. Emails sent to contacts for case creation and update notifications also include a link to the community.

SEE ALSO:

Merge Fields for Communities

Set Up the Community Case Feed

Community Case Feed

With the community case feed, agents and community users see the life cycle of a case from start to finish: all case interactions appear in a unified, chronological Chatter case feed. Community users benefit from the added functionalities of Chatter, while support-side features help agents provide efficient, personalized support.

The community case feed gives community users an intuitive, versatile environment where they can manage their cases. Internal and external users see the following interactions in the community case feed:

- Chatter text, file, and link posts
- Questions in Chatter that are associated with the case
- Case emails

Note: To learn more about case email visibility, see Emails in the Community Case Feed.

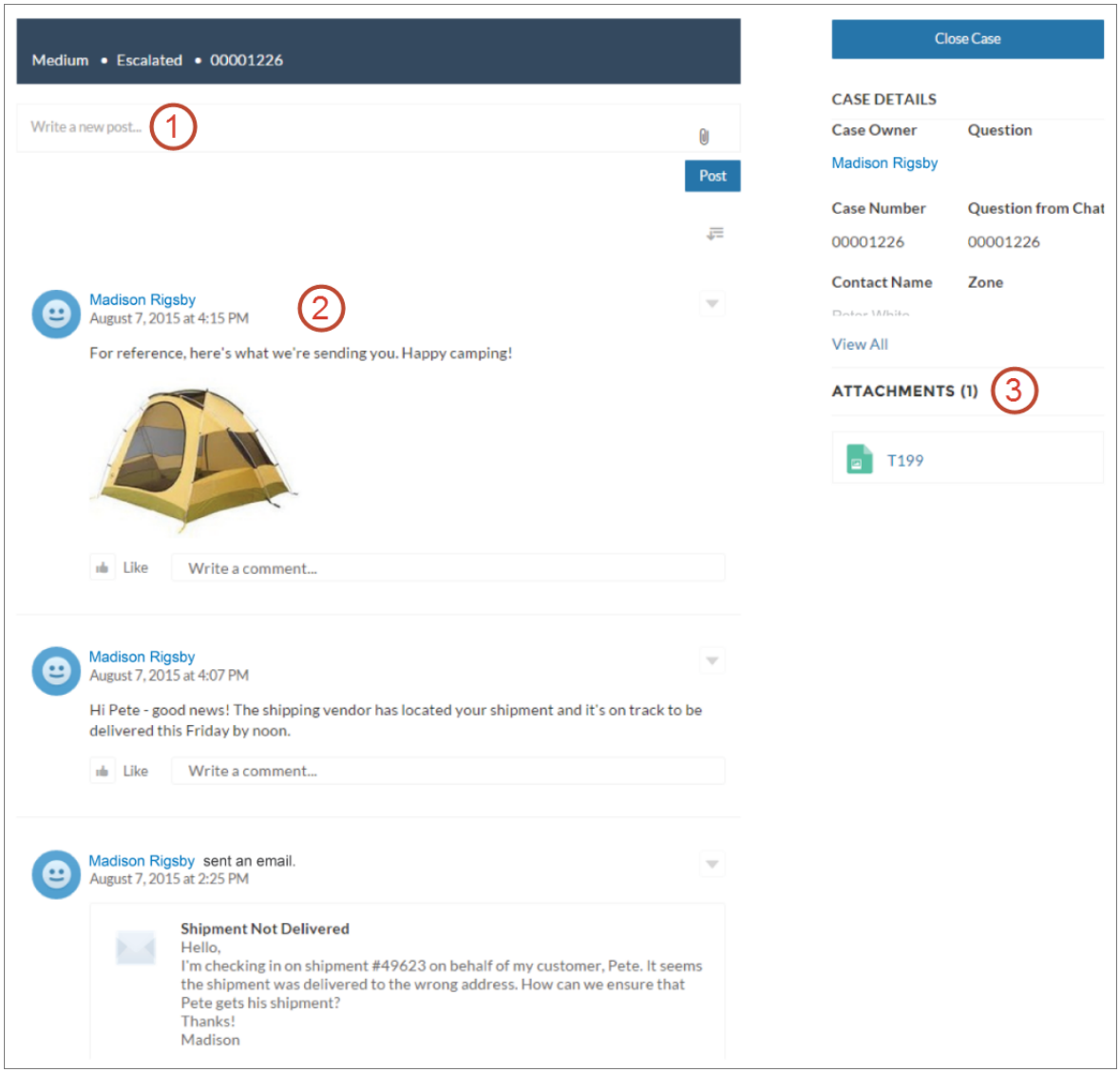
If the Salesforce administrator exposes read-only social posts on cases, these also appear in the feed.

Community case feed in a community built on the Napili template:

EDITIONS

Available in: Salesforce Classic

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



Using the publisher **(1)**, users create posts and attach files to the case. The feed **(2)** comes fully equipped with Chatter's collaboration tools: users can bookmark, like, and comment on posts, and mention other users. Images and comments appear inline, making it easy to scan the feed for details. The Attachments component **(3)** displays all case attachments.

When the community case feed is enabled, support agents can:

- Use the Community action in the console case feed to answer community questions and create private and public Chatter posts on cases
- Expose or hide a published post or email in the community case feed of external users

The community case feed is available in all communities that use the self-service community templates or Salesforce Tabs + Visualforce.

Known Issues

- In communities built on templates, emails in the community case feed don't display inline images or clickable links.

- In communities built on the Koa or Kokua community templates, users' names in the community case feed look like links but don't lead anywhere.

SEE ALSO:

Community Case Feed Considerations

Set Up the Community Case Feed

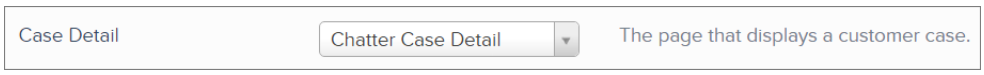
Expose or Hide a Published Post or Email in the Community Case Feed

Set Up the Community Case Feed

The community case feed lets community users and support agents see all case interactions in a unified feed, and lets agents take more actions directly from the console. To set up the community case feed, enable it in your organization and make sure that the case page in your community is properly configured.

Important: Before setting up the community case feed, read Community Case Feed Considerations.

1. Enable the community case feed:
   a. From Setup, enter `Support Settings` in the Quick Find box, then select **Support Settings**.
   b. Select **Enable Community Case Feed**.
   c. Optionally, select **Enable Email Notifications for Case Posts** (recommended).
   d. Click **Save**.
2. If your community was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
3. If your community uses the Koa, Kokua, or Napili template, confirm that your active case detail page supports the community case feed:
   a. In Community Builder, click  .
   b. Click **Page Management**.
   c. Find Case Detail in the Name column, and make sure that the active page assigned to it is either Chatter Case Detail (the default) or Record Detail.



   If you change the active case detail page, publish your change.

   Important: If the community case feed is enabled and you use Basic Case Detail as your active case detail page, external users only see case comments—not Chatter posts or emails—in their case feed. This gives external users far less visibility into their cases. To give users a full view of their case interactions, use Chatter Case Detail or Record Detail as your active case detail page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable the community case feed:

- "Customize Application"
- Compact case feed enabled in your organization

Community Case Feed Considerations

Before setting up the community case feed, review this essential information.

EDITIONS

Available in: Salesforce Classic

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

If the community case feed is enabled:

- Agents can use the Community action in the console case feed to answer community questions and create private and public Chatter posts on cases.
- Agents can expose or hide published Chatter posts and emails in the case feed of external community users.
- External community users with access to a case see associated Chatter posts, questions, and emails in their case feed.

If email notifications for case posts are enabled:

- The case contact is notified by email when someone makes an externally visible post on their case. Users can comment on the post by replying to the email.
- If you're already using custom email notification settings, such as those triggered by workflows, selecting this preference may create duplicate email notifications.
- Users in communities built on the Napili template or Salesforce Tabs + Visualforce can turn off these notifications in their email notification settings by deselecting **Posts on one of my cases** under "Email me when someone...".

SEE ALSO:

Emails in the Community Case Feed

Expose or Hide a Published Post or Email in the Community Case Feed

Set Up the Community Case Feed

Emails in the Community Case Feed

When you enable the community case feed, external users with access to a case see case emails in their feed. Emails in the community case feed include the email's author, recipients, text, and time sent.

By default, if the case contact sends or receives a case email, that email appears in the feed of all users—both internal and external—with access to the case. For an external user to view the case, their profile must include access to cases in the community.

For example, suppose Rita, an external user, posts a question in a community. The question remains unresolved, and a community moderator creates a case from it using the Question-to-Case action. If the support agent assigned to the case emails Rita from the email publisher, Rita and all other users with access to the case see the email in their case feed. Users with access to a case typically include the assigned support agent and the case contact.

If the community case feed is enabled, you can write an Apex trigger or process to hide or expose all case emails in the feeds of external community users. The `IsExternallyVisible` field of the EmailMessage object controls the visibility of email messages in the community case feed. When the field is set to `true` emails sent or received by the case contact are visible to external users with access to the case.

Example: The following trigger exposes all case emails in the feeds of external users with access to the case. This means that case emails between internal users will also be visible to external users with access to the case (for example, if the assigned support agent used the email publisher to email their shipping vendor). To *hide* all case emails from external users' case feeds, simply change `true` to `false`:

```
trigger makepublic on EmailMessage (before Insert) {
for(EmailMessage oe:trigger.new){
oe.IsExternallyVisible=true;
```

```
}

}
```

SEE ALSO:

Expose or Hide a Published Post or Email in the Community Case Feed

Expose or Hide a Published Post or Email in the Community Case Feed

When necessary, support agents can expose or hide individual case emails and published Chatter posts in the case feed of community users.

To change the external visibility of a published Chatter post or email on a case:

1. Navigate to the post or email in the compact case feed.
2. In the post or email's drop-down menu:
   - Select **Make Public** to expose an internal Chatter post or email in the case feed of external users with access to the case
   - Select **Make Private** to remove a Chatter post or email from the case feed of external users with access to the case

EDITIONS

Available in: Salesforce Classic

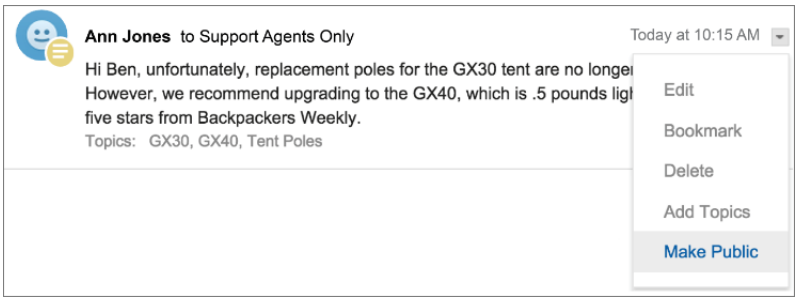
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit the external visibility of a published Chatter post or email on a case:

- "Edit My Own Posts"
- "Edit Posts on Records I Own"
- Compact case feed enabled in your organization
- Community case feed enabled in your organization

Make Public option on a case Chatter post:



Make Public option on a case email:

The agent who owns the case and their superiors see the **Make Public** and **Make Private** options on all case emails and Chatter posts on the case. Internal users who don't own the case also see these options on case posts or emails that they authored.

Making Emails and Chatter Posts *Private*

Clicking **Make Private** on a case Chatter post or email means that the case contact and any other external users with access to the case no longer see the post or email in their case feed. (It still appears in the feeds of internal users with access to the case.) An agent might choose to make an email or post in the community case feed private if they want to hide their correspondence with the case contact from the case feed of other external users with access to the case.

Note: Keep in mind that when you make an email private, the email recipient(s) already received the email. Similarly, when you make a Chatter post private, remember that external users with access to the case may have been notified by email when it was first posted.

Making Emails and Chatter Posts *Public*

Clicking **Make Public** on a case Chatter post or email means that the case contact and any other external users with access to the case now see the post or email in their case feed. An agent might choose to make an email or post in the community case feed public in order to keep the case contact updated about internal progress on the case.

Note:

- The case feed offers handy visual cues to help agents quickly identify which case posts are externally visible. To learn about enabling these visual cues, see "Feed View Options" in Settings for Feed Views in Case Feed.
- You can write an Apex trigger or process to hide or expose all case emails from the community case feed of external users. For more information, see Emails in the Community Case Feed.

SEE ALSO:

Community Case Feed

Post on Cases and Community Questions with the Community Action in the Case Feed

The Community action in the case feed is your default option for responding to customers on cases that originated from a community or customer portal.

To post on cases in a customer portal or community:

1. Click **Answer Customer** on the Case Feed page.
2. Click ▾ and select **Community**.
   Depending on how your administrator has set up Case Feed, you may be able to click **Community** without first having to click **Answer Customer**.
3. Enter the message to the customer.

EDITIONS

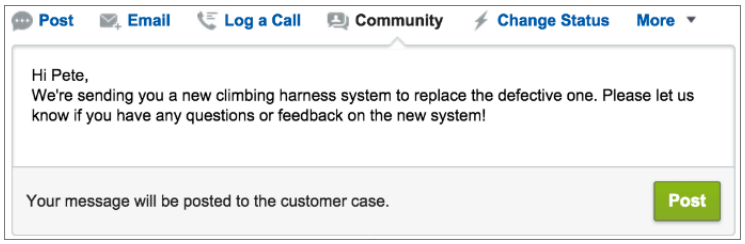
Available in: Salesforce Classic

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

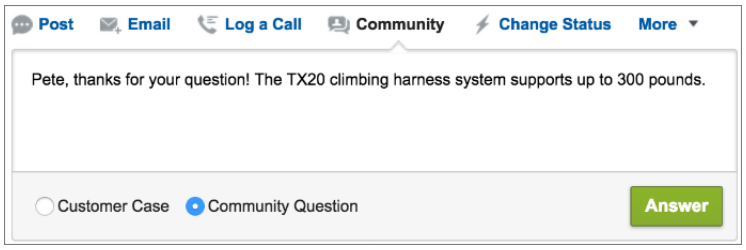
USER PERMISSIONS

To create case posts in customer portals or communities:

- "Edit" on cases



4. If you're working on a case that was escalated from a question in Chatter Questions or Chatter Answers, choose who you want your post to be visible to:
   - Select **Customer Only** to post your answer as a private reply, or **Everyone** to post it as a public reply.
   - Select **Customer Case** to make a post visible to all internal and external users with access to the case, or **Community Question** to post a public answer on the community user's question. If you select **Customer Case** and your Salesforce administrator has enabled the community case feed, you'll be creating a Chatter post instead of a case comment.



5. Optionally, select `Send Email` to send a message to the customer letting them know that a reply to their question has been posted to the case.

   Note: This option is only available if your administrator has enabled it, and if the customer you're replying to is associated with the case and has a valid email address. If your organization uses the community case feed and email notifications for Chatter case posts are enabled, users are automatically notified by email about public posts on their cases and this option doesn't appear.

6. Optionally, attach a Knowledge article to the post.
7. Click the button to publish your post.

Note: If the community case feed is enabled in your organization, you can change the visibility of case posts after they are published. For details, see Expose or Hide a Published Post or Email in the Community Case Feed.

SEE ALSO:

Community Case Feed

Enable Chatter Questions in Your Community

Chatter Questions helps you promote community engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and communities can answer questions in Chatter just as they would comment on a Chatter post. Users in communities built on the Napili template can also attach files to questions.

To set up Chatter Questions in your community, simply add the Question action to the global publisher layout. In organizations created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.

Note: Chatter Questions is not available in communities built on the Koa and Kokua community templates.

EDITIONS

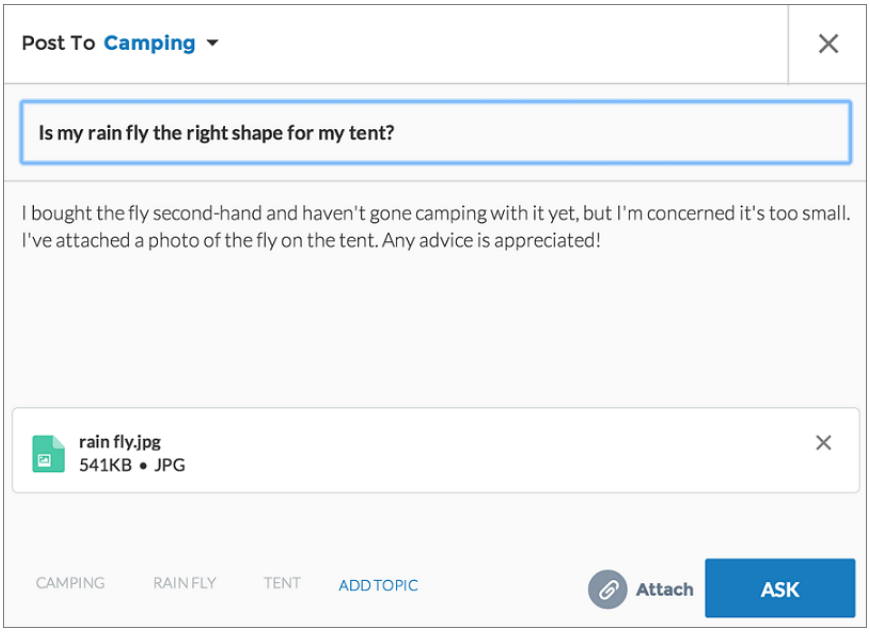
Available in: Salesforce Classic

Chatter Questions is available in: **Group**, **Professional**, **Developer**, **Performance**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To edit the global publisher layout:

- "Customize Application"



1. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
2. Click **Edit** next to the global publisher layout.
3. Drag the Question action from the palette to the global publisher layout. If the Question action already appears in the layout, drag it to the location where you want it.
4. Click **Save**.

Note: If you're using a customized publisher layout in groups or on records, make sure that the Question action is added to those layouts as well.

Enable Chatter Answers in Your Community

Chatter Answers is a self-service support community where users can post questions and receive answers and comments from other users or your support agents.

To set up Chatter Answers in Salesforce Communities, follow these high-level steps:

1. Enable Chatter Answers.
   a. From Setup, enter `Chatter Answers Settings` in the `Quick Find` box, then select **Chatter Answers Settings**.
   b. Select **Enable Chatter Answers**.
2. Ensure that your community members have access to the following objects within your organization:
   - Questions
   - Knowledge Articles
   - Data Categories
3. Create a zone for Chatter Answers.
   a. Enable the zone for Chatter Answers.
   b. Set the `Visible In` setting to the community that you want the zone shown in.
   c. As a best practice, select a public group from your organization to designate as a Customer Support Agents Group.
4. Add the Q&A tab to your community.
   a. From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
   b. Click **Administration** > **Tabs**.
   c. Add the Q&A tab to the Selected Tabs list.
   d. Click **Save**.
   e. Click **Close**.
5. Make the Q&A tab visible on profiles that need access to it.
   a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
   b. Click **Edit** for the profile that you want to make the Q&A tab visible for.
   c. Under Standard Tab Settings, set the `Q&A` tab to Default On.
   d. Click **Save**.

After you have enabled Chatter Answers in your community, consider the following extra deployment options:

- A public-facing Force.com site with or without a portal.
- A Visualforce tab, which provides branding, a customized landing page, and custom access to Chatter Answers within your community.

If a user self-registers for a community with Chatter Answers enabled, the Chatter Answers User permission is not automatically set for the user. Set permissions for Chatter Answers on the community user.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Chatter Answers in Salesforce Communities:
- "Customize Application"

Set Up Question-to-Case

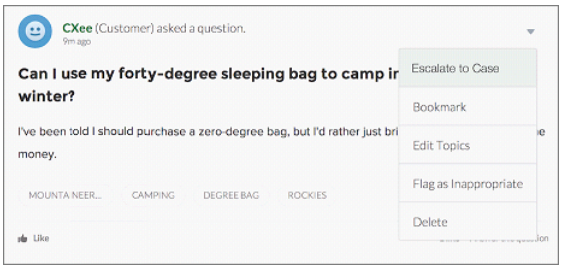
Add Question-to-Case to your communities, your Salesforce organization, or both.

Question-to-Case lets moderators create cases from unresolved questions in Chatter, which makes it easier to track and resolve your customers' issues. Moderators can create cases from questions directly in the feed, or you can set up processes—similar to workflow rules—in the Lightning Process Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.

EDITIONS

Available in: Salesforce Classic

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



Question-to-Case is only available in communities where Chatter Questions is enabled.

IN THIS SECTION:

1. Enable Question-to-Case

   Question-to-Case lets moderators create cases from questions in Chatter to ensure that your customers' questions are quickly resolved. Enable Question-to-Case in your communities, Salesforce organization, or both.

2. Add the Question from Chatter Field to the Case Detail View

   When a case is created from a question in Chatter, the `Question from Chatter` field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.

3. Add the Escalate to Case Action to the Feed Item Layout

   Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

4. Confirm Access to the Escalate to Case Action

   Does your organization use more than one record type for cases? Make sure that the profiles that need Question-to-Case have access to the record type associated with the Escalate to Case action. If your organization has only one record type for cases, skip this process.

5. Customize the Escalate to Case Action Layout

   Choose which fields appear on the Escalate to Case action, and in what order, based on the information you need to track for each case.

6. Automatically Assign Cases from Questions to a Queue

   Case assignment rules aren't supported in Question-to-Case, so by default, cases created from questions are assigned to the moderator who escalates the question. If you'd like, you can write a workflow rule or process that automatically adds questions that were created from cases to a queue so agents can claim them.

7. Automatically Create Cases from Unresolved Questions in Chatter

   As your community or organization develops, ensure that users get speedy answers to their questions. Question-to-Case lets moderators escalate unresolved questions to cases in the feed, but you can make your case resolution process even more efficient by setting up processes—similar to workflow rules—in the Lightning Process Builder. Set up a process that automatically creates a case from questions that meet specified criteria.

Enable Question-to-Case

Question-to-Case lets moderators create cases from questions in Chatter to ensure that your customers' questions are quickly resolved. Enable Question-to-Case in your communities, Salesforce organization, or both.

1. From Setup, enter `Support Settings` in the `Quick Find` box, then select **Support Settings**.
2. To enable Question-to-Case in all communities where Chatter Questions is enabled, select **Enable Question-to-Case in Communities**.
3. To enable Question-to-Case in your Salesforce organization, select **Enable Question-to-Case in Salesforce**.
4. Click **Save**.

Note: Make sure your case page layout is feed-based. The feed-based case page layout lets agents and moderators use the Community action to respond to escalated questions. If your organization was created before Spring '14, your case page layout may not be feed-based.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Question-to-Case:
- "Customize Application"

Add the `Question from Chatter` Field to the Case Detail View

When a case is created from a question in Chatter, the `Question from Chatter` field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.

First, use field-level security to specify which users can see the `Question from Chatter` field on case detail pages.

1. From the object management settings for cases, go to Fields.
2. Click **Question from Chatter**.
3. Click **Set Field-Level Security**.
4. Select **Visible** for any profile that you want to be able to use Question-to-Case.
5. Click **Save**.

After you make the field visible to users, you can choose to add it to the Case Details view.

1. From the object management settings for cases, go to Page Layouts.
2. Click **Edit** next to the page layout that you want to customize.
3. Drag the `Question from Chatter` field from the Fields section of the page layout editor palette to the Case Information section of the page.
4. Click **Save**.
5. Click **Page Layout Assignment** to confirm that the user profiles which need Question-to-Case are assigned to the page layout that you customized. In addition, assign internal users who need access to the `Question from Chatter` field on cases to that page layout.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set field-level security:
- "Manage Profiles and Permission Sets"

  AND

  "Customize Application"

To customize page layouts
- "Customize Application"

Add the Escalate to Case Action to the Feed Item Layout

Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

1. From Setup, enter *Feed Item* in the Quick Find box, then select **Feed Item Layouts**.
2. Click **Edit** next to Feed Item Layout.
3. Drag the Escalate to Case action from the Quick Actions category in the palette to the Quick Actions in the Salesforce Classic Publisher section.
4. Click **Save**.
5. Click **Page Layout Assignments** to confirm that the user profiles that need Question-to-Case are assigned to the Feed Item Layout.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit page layouts:
- "Customize Application"

Confirm Access to the Escalate to Case Action

Does your organization use more than one record type for cases? Make sure that the profiles that need Question-to-Case have access to the record type associated with the Escalate to Case action. If your organization has only one record type for cases, skip this process.

First, check which record type is assigned to the profiles that need access to the Escalate to Case action.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click the name of a profile.
3. In the Record Type Settings section, make a note of which case record types the profile uses.
4. In the Permissions section, make sure that the user profile has either the **Moderate Chatter** or **Moderate Communities Feeds** permission enabled.

Then, check which record type the Escalate to Case action uses, and change it if necessary.

1. From Setup, enter *Actions* in the Quick Find box, then select **Feed Item Actions**.
2. Click **Edit** next to the Escalate to Case action.
3. Confirm that the Record Type field shows a record type that's assigned to the profiles that need access to this action. If it doesn't, select an appropriate record type from the drop-down list.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign record types:
- "Customize Application"

Customize the Escalate to Case Action Layout

Choose which fields appear on the Escalate to Case action, and in what order, based on the information you need to track for each case.

1. From Setup, enter *Actions* in the Quick Find box, then select **Feed Item Actions**.
2. Click **Layout** next to the Escalate to Case action.
3. Drag any fields you want to add to the action from the action layout editor palette, and reposition them if necessary.
4. Click **Save**.

Note: In public communities, you can't look up a contact when the case is submitted, so we recommend that you remove the Contact field from the Case Action layout.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize page layouts:
- "Customize Application"

Automatically Assign Cases from Questions to a Queue

Case assignment rules aren't supported in Question-to-Case, so by default, cases created from questions are assigned to the moderator who escalates the question. If you'd like, you can write a workflow rule or process that automatically adds questions that were created from cases to a queue so agents can claim them.

You can assign escalated questions to a queue in several ways. The basic approach is to write a process in the Lightning Process Builder that automatically assigns a case to a specified queue if the Type field on the case is equal to Question. You can also build the process to accommodate multiple queues. For example, have your process assign cases with a certain topic to a different queue.

The way you use queues in escalated questions will depend on your users, your goals, and more. Find an approach that best fits your business needs.

To learn how to create a queue, see Create Queues.

EDITIONS

Available in: Salesforce Classic

Question-to-Case is available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Automatically Create Cases from Unresolved Questions in Chatter

As your community or organization develops, ensure that users get speedy answers to their questions. Question-to-Case lets moderators escalate unresolved questions to cases in the feed, but you can make your case resolution process even more efficient by setting up processes—similar to workflow rules—in the Lightning Process Builder. Set up a process that automatically creates a case from questions that meet specified criteria.

Important: These steps apply only to organizations and communities that use Chatter Questions. Not sure if that's you? See Differences Between Q&A Features in Salesforce.

You can use Question-to-Case in processes in several ways. For example, consider setting up processes that:

- Create a case from a question if a week has passed, the question has received more than ten likes, and a best answer hasn't been selected.
- Create a case from a question immediately if the question contains the word "competitor."

EDITIONS

Available in: Salesforce Classic

Question-to-Case is available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Lightning Process Builder is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Processes related to Question-to-Case act on the Feed Item object. The process includes a flow that evaluates whether question posts meet your escalation criteria. You can create flow variables based on several Feed Item fields, including:

- `BestCommentId`: The ID of the comment that was selected as the best answer. If no comment has been selected as the best answer, this field is null.
- `CommentCount`: The number of comments on a question.
- `LikeCount`: The number of likes on a question.

Tip:

- Each flow variable's data type must match the feed item field's data type. `CommentCount` and `LikeCount` are number fields, while `BestCommentId` is a text field.
- The creation of a feed item can trigger a process, but updates to feed items (such as likes and comments) cannot. Depending on your process, you might need to specify how much time must pass before a related flow runs.

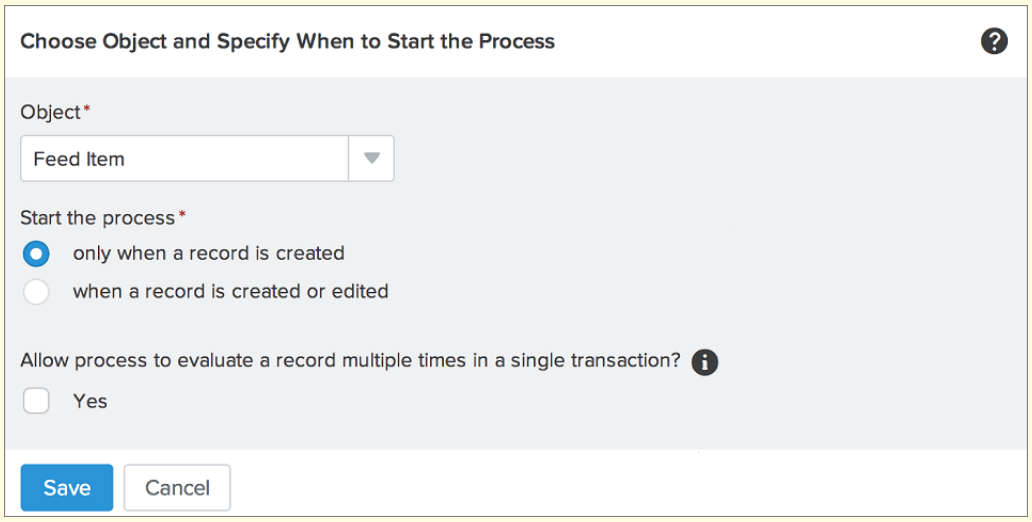
Beyond the Basics

Robert, a Salesforce administrator, wants questions to be automatically escalated to cases if they meet these criteria:

- 24 hours have passed
- The question received more than four comments
- A best answer wasn't selected

Step 1: Create a Process

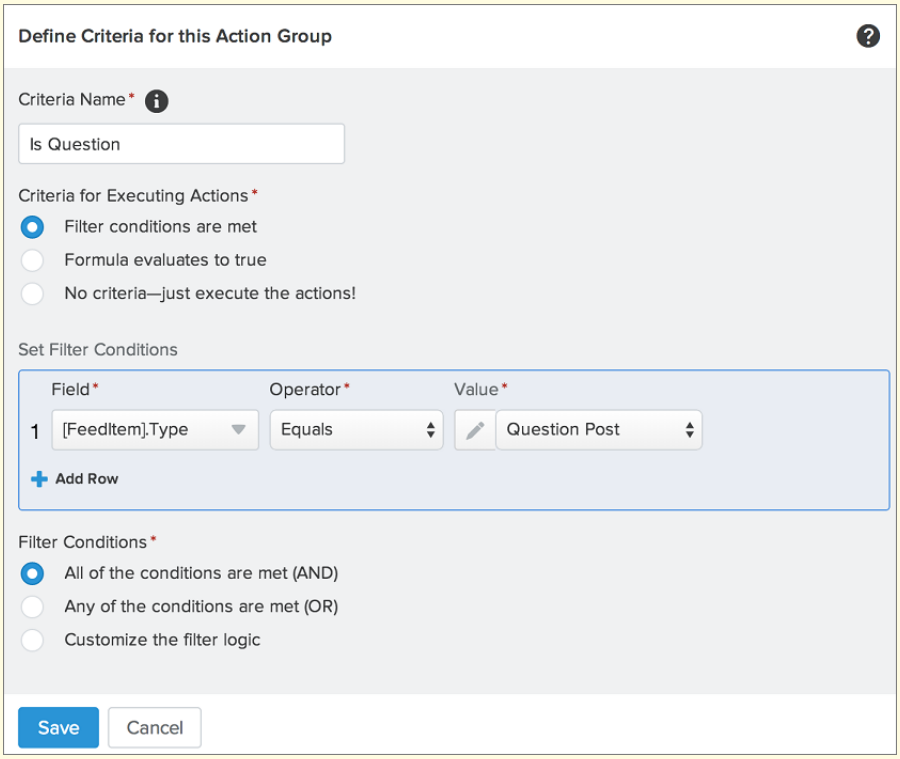
First, Robert creates a process in the Process Builder on the Feed Item object. The process runs only when feed items are created.



Step 2: Add Criteria

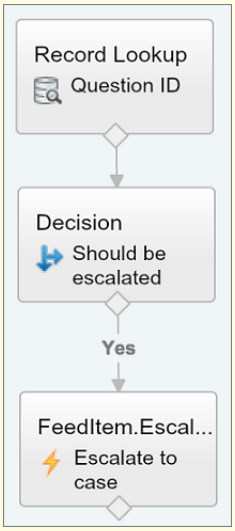
Robert adds criteria to his process that check whether newly created feed items are questions. He uses the following settings:

- Criteria Name = `Is Question`
- Criteria for Executing Actions = `Filter conditions are met`
- Filter Condition = `[FeedItem].Type` *`Equals`* `Question Post`
- `All of the conditions are met (AND)`



Step 3: Add a Flow

Robert creates a simple flow named "Escalate Question to Case" in the Cloud Flow Designer. The flow includes three elements: a *record lookup*, a *decision*, and a *quick action*. It checks whether a question has received four or more comments, and whether a best answer has been selected.



The *record lookup* element retrieves the record ID of a question post. It uses the following settings:

- Name = `Question ID`
- Lookup = `FeedItem`
- Field = `Id`

- Operator = `equals`
- Value = `{!QuestionID}`

  Note: For the Value field, Robert creates a text variable named `{!QuestionID}` with an Input/Output type of `Input and Output`.

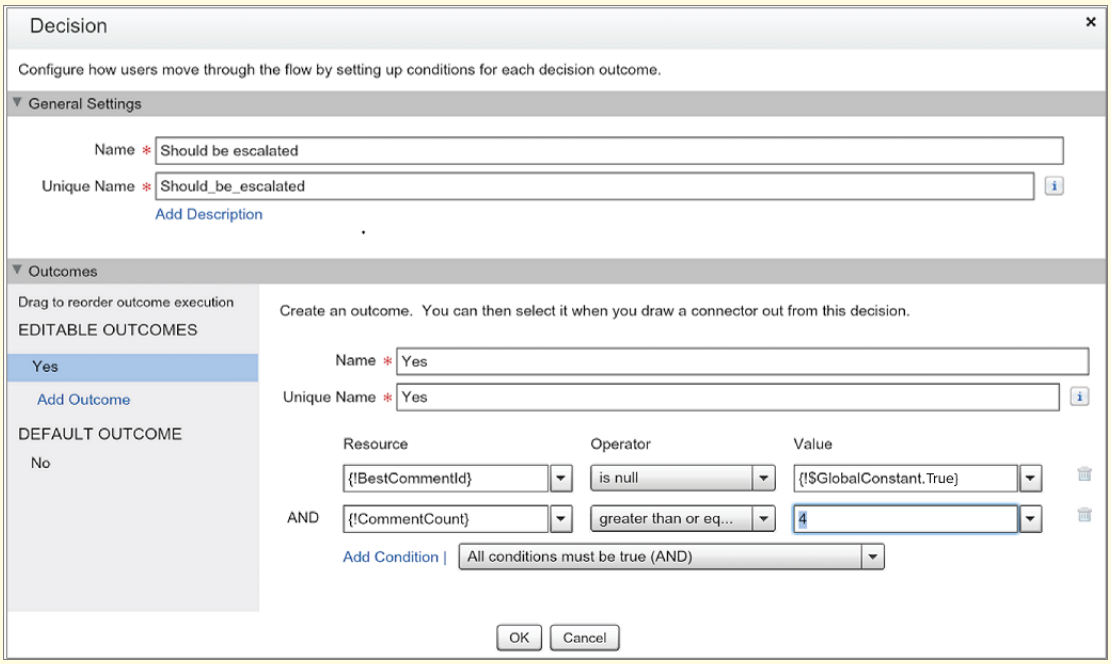
The *decision* element specifies whether the question should be escalated to a case. It uses the following settings:

- Name = `Should be escalated`
- Default Outcome = `No`
- Editable Outcome = `Yes`
  - Flow Conditions = `{!BestCommentId}` *`is null`* `{!$GlobalConstant.True}`

    AND

    `{!CommentCount}` *`greater than or equal to`* `4`
  - `All conditions must be true (AND)`

    Note: For the Flow Conditions, Robert creates two new variables: a text variable named `{!BestCommentId}` and a number variable named `{!CommentCount}`, both with an Input/Output type of `Input and Output`.



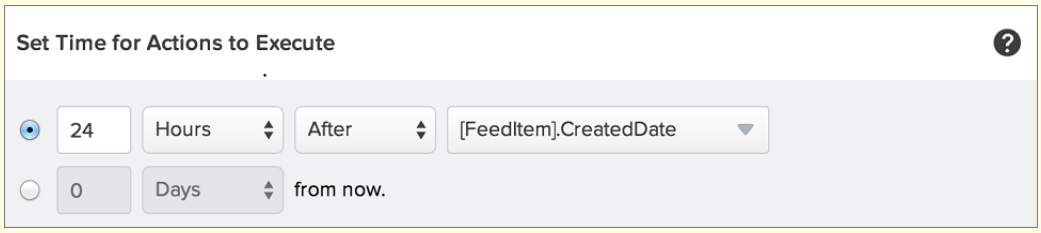
The **FeedItem.EscalateQFIToCase** Quick Action escalates the question to a case if the conditions for the **Yes** outcome are met. It uses the follow settings:

- Name = `Escalate to case`
- In the Inputs section, Related Record ID = `{!QuestionId}`

Warning: Do not edit the name of the **FeedItem.EscalateQFIToCase** Quick Action. Editing the name of the action causes it to appear in the action drop-down menu of text, attachment, and link feed posts as well, leading to errors.

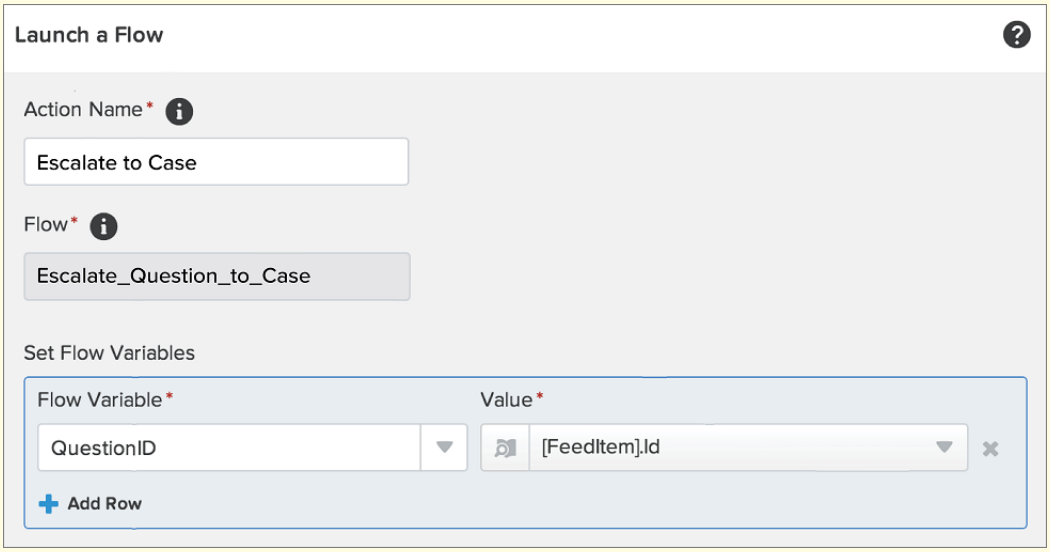
Step 4: Add the Flow to the Process

After completing the flow, Robert incorporates it into his process as a scheduled action. First, he specifies that the flow must run 24 hours after a feed item has been created.



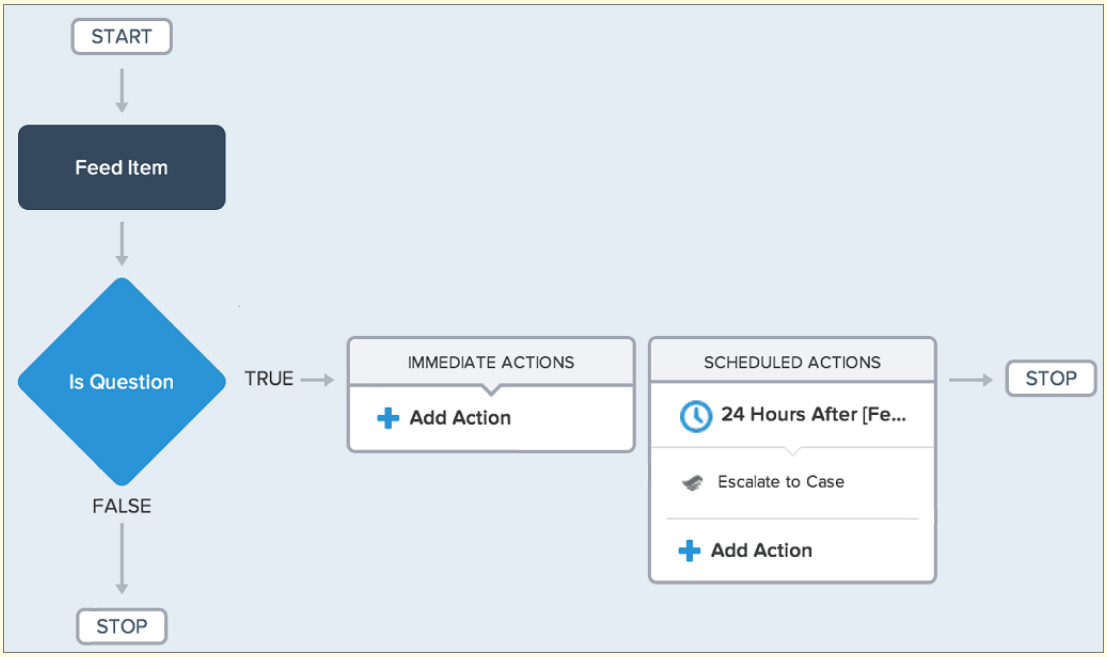
Next, he adds the flow to the process with a variable that uses information from the feed item record. He uses the following settings:

- Action Name = `Escalate to Case`
- Flow = `Escalate_Question_to_Case`
- **Variable:**
  - Flow Variable = `QuestionId`
  - Value = `[FeedItem].Id`



Step 5: Save and Activate the Process

Take a look at Robert's completed process.



After Robert activates his process, it will run on all future questions that are posted in communities and in Salesforce.

Tip: Robert may want to create a similar process that escalates questions to cases after they receive ten or more likes. He can save time by cloning this process and associating it with a flow that checks the number of likes on questions.

Enable Salesforce Knowledge in Your Community

USER PERMISSIONS

To create, customize, or activate a community:	"Create and Set Up Communities" AND is a member of the community they're trying to update
To set up Salesforce Knowledge, create article types and article actions, and modify category groups assignments:	"Customize Application" AND "Manage Salesforce Knowledge"
To assign user licenses:	"Manage Internal Users"
To create data categories:	"Manage Data Categories"

EDITIONS

Available in: Salesforce Classic

Communities is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Salesforce Knowledge is available in: **Performance** Edition.

Salesforce Knowledge is available for an additional cost in: **Enterprise**, **Unlimited**, and **Developer** Editions.

Enable Salesforce Knowledge to let community users view Knowledge articles.

You can use Communities to access your knowledge base articles if your Salesforce organization has a Salesforce Knowledge license. Once Salesforce Knowledge is enabled, complete the following steps to view articles in your communities.

1. Update profiles:

- Clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles and enable the "Read" permission for article types you want to share with community users.
- Verify that the tab visibility for the Articles (or Knowledge) tab is Default On.
- Remember to click **Edit Profiles**, at the bottom of the detail page, and activate the new profile.

2. Add the Knowledge tab to each community.

   Note: Community members without the Knowledge One permission cannot access Knowledge through Communities. They also can't access Knowledge in communities via the Salesforce1 mobile browser and downloadable apps.

3. If you want your community users to have different category group visibility settings, change the visibility settings by permission set, profile, or role. For example, you can prohibit users with the Customer Community User profile from seeing articles in a certain category group by changing the data category visibility for that profile.
4. Notify users who create articles that they must select **Customer** for users with Customer Community or Customer Community Plus licenses, or **Partner** for users with Partner Community licenses, as a channel option when creating or modifying an article. If the appropriate channel is not selected, the article is not published in the community.

Enable Ideas in Your Community

Ideas enable a group of users to post, vote for, and comment on ideas. Enabling Ideas in a community provides an online, transparent way for you to attract, manage, and showcase innovation.

To manage organization-wide settings for Ideas, follow these high-level steps:

1. From Setup, enter *`Ideas Settings`* in the `Quick Find` box, then select **Ideas Settings**
   a. To enable Ideas for your organization, select the `Enable Ideas` checkbox.
   b. Optionally, select `Enable Text-Formatting, Images and Links` to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.

      Once you enable the HTML editor, you can't disable it.
   c. Ensure that the multi-select `Categories` field is enabled by clicking the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the `Categories` field enabled.
   d. To let Ideas members associate more than one category with an idea, select `Enable Categories`. Once you enable multi-select categories, you can't disable it.
   e. To let users earn points and ratings based on their activity in each zone, select `Enable Reputations`.
   f. In the `Half-Life (in Days)` field, enter the number of days.

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

2. Define and customize fields for Ideas:
   a. Define picklist values for the `Categories` and `Status` fields.

      Make sure that you add the categories and statuses to the zones you'll be including in the community.
   b. Set field-level security for standard and custom fields.
   c. Create custom fields and set validation rules on them.

      Custom fields appear in the Additional Information section on the Post Idea and Idea Detail pages.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Ideas settings:
- "Customize Application"

   d. Optionally, add the `Attachment` field to the layout and set field-level security to enable users to add files to their ideas.

3. To enable experts within your zones, create a public group that includes these users.
4. Optionally, enable Idea Themes in your organization.
5. Create one or more zones to organize ideas into logical groups, and associate the zones with the community.
6. Customize your Ideas page layouts to display the information you want to see.
7. Create validation rules that prevent offensive language from being used in the zone
8. Set up Apex triggers and validation rules for comments on ideas.
9. Enable user profiles for community members and moderators and ensure the profiles can access Ideas.
10. Add the Ideas tab and the Idea Themes tab to the community.

Enable Leads for Partner Users

Enable leads for partner users so that they have access to and can create leads in your communities.

When you enable leads for partner users in your community, you can assign leads to those members. Additionally, partner users can edit leads, create leads, import leads, and also mass update leads in a list view.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable leads for partner users:

- "Manage Profiles and Permission Sets"

1. In Community Management, click **Administration** > **Tabs**, and add the **Leads** tab to the list of available tabs in your community.
2. In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. We recommend using a permission set if you plan to apply these permissions selectively.
   a. If using a permission set, use the following settings for leads:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select "Read," "Create," and "Edit."
   b. If using a profile, such as the Partner User profile, set the leads tab setting to `Default On` and enable the "Read," "Create," and "Edit" object permissions for leads.
3. Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.

   Note: Partner users with legacy portal licenses can use these advanced features in communities, but not in portals.

Feature	Partner User Permission Needed
To import leads using the **Import Leads** link on the Leads tab in your community.	"Import Leads"
If your partner user is importing leads, it might also make sense to allow them to import accounts and contacts using the **Import My Organization's Accounts & Contacts** link on the Accounts and Contacts tabs in your community.	AND Optionally, "Import Personal Contacts"
To change the status of multiple leads via the **Change Status** button.	"Manage Leads"
To change the owner of multiple leads via the **Change Owner** button.	"Transfer Leads"

Set Up Approvals for External Users in Your Community

Customer and partner users in your community can be assigned as approvers on records or added directly to queues. They can see and take action through the My Approvals and Approval History related lists on the record. Approvals can also be triggered directly from the Chatter feed.

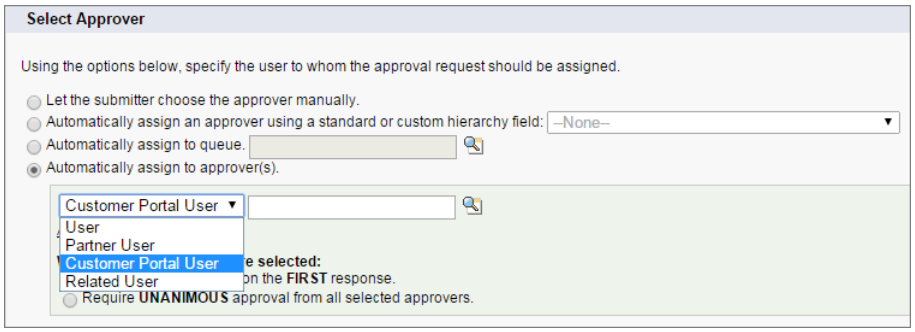
An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

Note:

- Users with high-volume licenses, such as High Volume Customer Portal and Authenticated Website, can't approve records.
- External users with legacy portal licenses can approve records in communities, but not in portals.

When setting up approvals or queues, use the lookup fields to find customer and partner users.

For example, when setting up an approval, if you want to automatically assign a customer user as an approver use the lookup list to find and specify the user.



EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, delete, or clone approval processes:

- "Customize Application"

To create or change queues:

- "Customize Application"

  AND

  "Manage Public List Views"

If you set up email notifications for your approval workflows, emails are sent based on community membership. If the user is a member of multiple active communities, the email comes from the oldest active community. Any links included in the email point users directly to the approval within the community.

In Salesforce1, users can see and take action from the Approval History related list, but they can't submit requests for approval. To submit requests for approvals, the user must do so from the full Salesforce site.

Enable Wave Analytics in Your Community

Enable Wave for Communities to allow your partner and customer users to view and explore Wave Analytics dashboards in your community.

Note: Only users with a Customer Community Plus or Partner Community license can use this feature. This feature is supported in communities but not in portals.

After Wave Analytics is set up in your Salesforce org, complete the following steps to share Wave dashboards in your community.

1. From Setup, enter *Wave Analytics* in the Quick Find box, then select **Settings**. Select Enable Wave Analytics for Communities.
2. On the user record for your community member, go to the Permission Set License Assignment section and enable the Analytics Cloud - Wave Community Users permission set license.
3. Create a permission set that includes the "View Wave Analytics on Communities Pages" permission and assign it to your community members.
4. In Wave, create dashboards and save them in a Wave app. Designate that app for sharing with the community. For more information about working with Wave, refer to the Wave Analytics Library.
5. Embed your Wave dashboards in Visualforce pages in your community. For more information, see Add a Wave Analytics Dashboard to a Visualforce Page.
6. From the Wave app containing your dashboards, give access to community members by selecting **Share**. Community partners and customers are only given Viewer access. From their community, they can drill in and explore the dashboard and its links.

EDITIONS

Available in: Salesforce Classic

Communities is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Wave Analytics is available in: **Developer** Edition

Wave Analytics is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND is a member of the community they're trying to update

To modify Wave Analytics settings:
- "Manage Wave Analytics"

To view Wave dashboards and lenses:
- "View Wave Analytics on Communities Pages"

Community Security and Authentication

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

IN THIS SECTION:

Authenticate Community Users

You have several options for authenticating users in your community. By default, external users authenticate by logging in with the username and password that Salesforce assigns them for the community. (External users are users with Community, Customer Portal, or partner portal licenses.) Your organization's internal users just follow the employee login flow using their Salesforce username and password.

Encrypt Community Data

You can add a measure of security to your community by encrypting files, attachments and many popular data fields. After encryption is enabled, only users with the "View Encrypted Data" permission can see that information.

Authenticate Community Users

You have several options for authenticating users in your community. By default, external users authenticate by logging in with the username and password that Salesforce assigns them for the community. (External users are users with Community, Customer Portal, or partner portal licenses.) Your organization's internal users just follow the employee login flow using their Salesforce username and password.

Note: All authentication options also work with custom HTTPS web addresses.

IN THIS SECTION:

Configure SAML for Communities

If your organization uses an existing single sign-on capability to simplify and standardize your user authentication, you can extend this capability to communities.

Configure Authentication Providers

External users can log in using their credentials from Facebook©, Janrain©, or another Salesforce organization if you set up authentication providers on the Auth. Providers page in Setup and choose to display them on the community login page.

Configure Authentication Flows with OAuth

If your organization wants to build integrations between communities and custom-branded apps, such as mobile or desktop apps, you can use OAuth to create a branded login page.

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Configure SAML for Communities

If your organization uses an existing single sign-on capability to simplify and standardize your user authentication, you can extend this capability to communities.

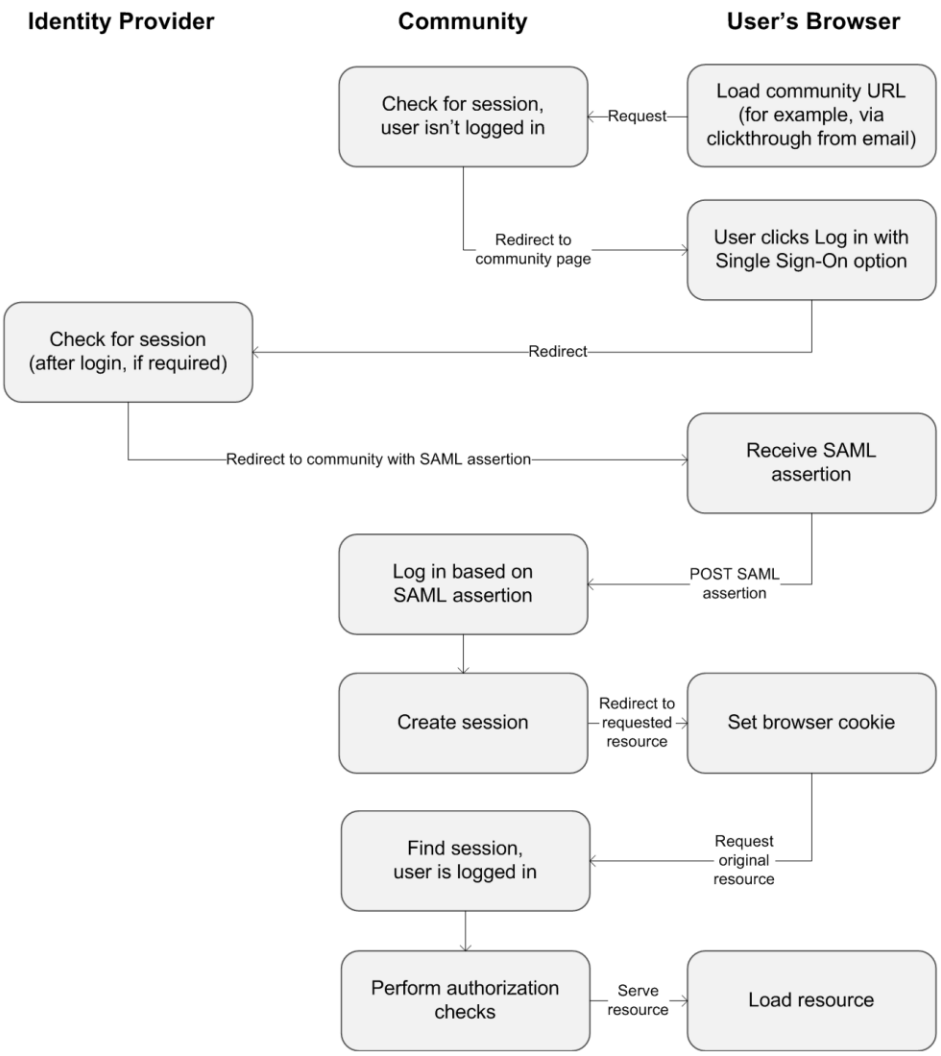
The following information assumes that you are already familiar with Security Assertion Markup Language (SAML) authentication protocols and know how to work with your identity provider to configure single sign-on for your organization. When implementing SAML for communities, the key is to use the community URL associated with login for the single sign-on flow. Also make sure that the community URL in the SAML assertion POST includes `/login`.

Here is a summary of how SAML requests and responses are processed between the user's browser, the community, and your identity provider.

EDITIONS

Available in: Salesforce Classic

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



This table compares what's required for community SAML assertions to what's required for other types of Salesforce domains.

Requirement	Standard	Portal	Force.com Sites	Community
URL where SAML assertion POST is made.	login.salesforce.com	login.salesforce.com	login.salesforce.com	*`community URL`*
Are `organization_id` and `portal_id` required in assertion?	No	Yes–passed as an attribute	Yes–passed as an attribute	No Note: Required if using Just-in-Time provisioning to create portal users in the community. Community-specific portal users can be provisioned with `portal_id` excluded.
Is `siteUrl` required in assertion?	No	No	Yes–passed as an attribute	No

The following sample SAML assertion shows the community URL specified as the Recipient, for a sample customer community in the Acme organization. This example applies to an organization that has a single SAML configuration.

```
<samlp:Response ID="_f97faa927f54ab2c1fef230eee27cba21245264205456"
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
   <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:nameid-format:
      entity">https://www.salesforce.com</saml:Issuer>

   <samlp:Status>
      <samlp:StatusCode Value="urn:oasis:names:tc:SAML:2.0:
         status:Success"/>
   </samlp:Status>

   <saml:Assertion ID="_f690da2480a8df7fcc1cbee5dc67dbbb1245264205456"
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
      <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:
         nameid-format:entity">https://www.salesforce.com</saml:Issuer>

      <saml:Subject>
         <saml:NameID Format="urn:oasis:names:tc:SAML:1.1:
            nameid-format:unspecified">saml_portal_user_federation_id
         </saml:NameID>

         <saml:SubjectConfirmation Method="urn:oasis:names:tc:
            SAML:2.0:cm:bearer">
         <saml:SubjectConfirmationData NotOnOrAfter=
            "2009-06-17T18:48:25.456Z"
            Recipient="https://acme.force.com/customers/login/?
saml=02HKiPoin4f49GRMsOdFmhTgi_0nR7BBAflopdnD3gtixujECWpxr9klAw"/>
         </saml:SubjectConfirmation>
      </saml:Subject>

      <saml:Conditions NotBefore="2009-06-17T18:43:25.456Z"
                       NotOnOrAfter="2009-06-17T18:48:25.456Z">

         <saml:AudienceRestriction>
            <saml:Audience>https://saml.salesforce.com</saml:Audience>
         </saml:AudienceRestriction>
      </saml:Conditions>

      <saml:AuthnStatement AuthnInstant="2009-06-17T18:43:25.456Z">

         <saml:AuthnContext>
            <saml:AuthnContextClassRef>urn:oasis:names:tc:SAML:2.0:
               ac:classes:unspecified
            </saml:AuthnContextClassRef>
         </saml:AuthnContext>
      </saml:AuthnStatement>

   </saml:Assertion>
</samlp:Response>
```

If your organization has multiple SAML configurations, the previous sample SAML assertion applies but note these differences in the Recipient.

- The trailing slash after `login` is not required

- The `so` parameter is required and must specify the organization ID

The Recipient would look like this:

```
Recipient="https://acme.force.com/customers/login?so=00DD0000000JsCM"
```

When logging out of a community, external users authorized using SAML for single sign-on are redirected to the `Identity Provider Logout URL`, if one is set in the community's SAML settings. To access the SAML settings, from Setup, enter *`Single Sign-On Settings`* in the `Quick Find` box, then select **Single Sign-On Settings**.

SEE ALSO:

Single Sign-On with SAML on Force.com

Configure Authentication Providers

External users can log in using their credentials from Facebook©, Janrain©, or another Salesforce organization if you set up authentication providers on the Auth. Providers page in Setup and choose to display them on the community login page.

Note: The following information assumes that you are familiar with the use of authentication providers for single sign-on.

If you're using a custom Visualforce login page instead of the default login page, use the `Single Sign-On Initialization URL` from an Auth. Provider detail page as the target URL of a custom login button. For example:
`https://login.salesforce.com/services/auth/sso/`*`orgID`*`/`*`URLsuffix`*`?community=https://acme.force.com/support`

If you're using Janrain as the authentication provider you can pass the following to the Janrain login widget that's deployed on your site.

```
janrain.settings.tokenUrl='https://login.salesforce.com/services/authcallback/orgID/URLsuffix'
+'?flowtype=sso&community='+encodeURIComponent('https://acme.force.com/customers');
```

SEE ALSO:

Customize Login, Logout, and Self-Registration Pages in Your Community

Configure Authentication Flows with OAuth

If your organization wants to build integrations between communities and custom-branded apps, such as mobile or desktop apps, you can use OAuth to create a branded login page.

The following information assumes that you're familiar with OAuth protocols and authentication flows for remote access applications. Communities support all available authentication flows, except for the username-password OAuth authentication flow and the SAML assertion flow. When implementing branded OAuth flows for communities, you configure the authorize URL to use the community URL. The authentication flow then directs users to the application approval page.

Note: As a security measure, when administrators are logged in as another user, they can't authorize OAuth data access for that user. For example, admins can't authorize OAuth access to user accounts, including single sign-on to third-party applications.

EDITIONS

Available in: Salesforce Classic

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

For example, to authenticate a user using an authorize URL like the following:

```
https://login.salesforce.com/services/oauth2/authorize?
response_type=token&client_id=your_app_id&redirect_uri=your_redirect_uri
```

Replace the `login.salesforce.com` host name with the full path to the community URL:

```
https://acme.force.com/customers/services/oauth2/authorize?
response_type=token&client_id=your_app_id&redirect_uri=your_redirect_uri
```

When implemented successfully, this URL directs users to the community login page. After they authorize the app, you then set a user access token and refresh token for future authentication. In requests for the token endpoint, replace the host with the community, like this:

```
https://acme.force.com/customers/services/oauth2/token
```

Note: After you acquire the `access_token` you can pass it as a Bearer token in the Authorization header request. Following is an example of a REST API call to communities: `https://acme.force.com/customers/services/data/v32.0/`

```
-H "Authorization: Bearer
00D50000000IehZ\!AQcAQH0dMHZfz972Szmpkb58urFRkgeBGsxL_QJWwYMfAbUeeG7c1E6
LYUfiDUkWe6H34r1AAwOR8B8fLEz6n04NPGRrq0FM"
```

SEE ALSO:

Digging Deeper into OAuth 2.0 on Force.com

Using OAuth to Authorize External Applications

"Step Three: Connect to Chatter REST API Using OAuth" in the Chatter REST API Developer Guide

Encrypt Community Data

You can add a measure of security to your community by encrypting files, attachments and many popular data fields. After encryption is enabled, only users with the "View Encrypted Data" permission can see that information.

Note: Only licensed community users can have the "View Encrypted Data" permission. You can't assign it to guest users.

For users with the "View Encrypted Data" permission, data encryption doesn't change anything about the community experience. However, encrypting the Account Name field has an effect on how users' roles are displayed to admins. Normally, a community user's role name is displayed as a combination of their account name and the name of their user profile. When you encrypt the Account Name field, the account ID is displayed instead of the account name.

For example, when the Account Name field is not encrypted, a user belonging to the Acme account with the Customer User profile would have a role called `Acme Customer User`. When Account Name is encrypted, the role is displayed as something like `001D000000IRt53 Customer User`.

If you are using Classic Encryption, data in encrypted custom fields is still masked.

Your community's specific settings for personally identifiable information (PII) apply regardless of whether data is encrypted.

Note: You can encrypt data in communities, but not in portals.

Design and Page Management

Plan Your Community Design Strategy

If you chose to use custom pages in your community instead of out-of-box tabs and branding, you need to decide whether to use Community Builder or Force.com. Once you make the decision, use the following sections to help you customize community pages:

- Use Visualforce and Force.com Sites
- Using Community Builder With Templates

- Use Community Builder (Site.com) Without Templates

You can also customize these other areas of your community:

- Add the Global Search Box to Your Customized Community HTML Header
- Configure a Custom Domain for Your Community
- Rename the Chatter Tab

Choosing Between Community Builder and Force.com Sites

If you want to add new pages or customize existing pages in your community, you can use Force.com Sites or Community Builder. With either option, you can create branded, publicly available pages such as landing or marketing pages, and private custom pages that only community members can access.

So which option should you use to customize your community? Well, that depends on your skills and the needs of your organization. You can even use a mixture of Force.com pages and Community Builder pages for complete control over your customizations.

Community Builder

Community Builder is an intuitive, convenient tool for customizing your community. Community Builder lets you create a community based on a preconfigured template, and then apply branding, edit pages, update your template, and publish changes all from one user-friendly interface.

Here's what you can achieve with Community Builder:

- Use one of the self-service templates—Koa, Kokua, or Napili—to easily create a responsive self-service community.
- Use the Aloha template to create a configurable App Launcher.
- Design pixel-perfect, branded pages.
- Create public pages that anyone can access, or add private pages that you can add as a tab within your community.
- Build and iterate quickly using drag-and-drop reusable page elements.
- Use ready-made forms to create web-to-lead forms or gather customer feedback.
- Create data-driven pages, such as product catalogs or other listings, using your organization's data.
- Set a home page and set up multilingual support for your community in Site.com Studio, a Web content management system that provides extra configuration options. Site.com Studio is easily accessible from Community Management.

Force.com Sites

Suitable for developers with experience using Visualforce, Force.com Sites lets you build custom pages and Web applications by inheriting Force.com capabilities including analytics, workflow and approvals, and programmable logic. So if you are looking to create sites programmatically using Apex and APIs, Force.com Sites is the product for you. Here's what you can achieve with Force.com:

- Create public, branded pages that anyone can access.
- Leverage Visualforce to create private pages that you can add as a tab within your community.
- Write your own controllers, or extensions to controllers, using Apex code.
- Create custom login or self-registration pages.
- Build dynamic web applications, such as an event management application.

Features At a Glance

Still unsure which product to choose? Take a look at this table to learn more about each product's features.

Feature	Community Builder	Force.com Sites
Public pages	✓	✓
Community templates (Koa, Kokua, Napili, Aloha)*	✓	
Authenticated pages*	✓	
Visualforce pages		✓
Out-of-the-box login, logout, self-registration, and error pages	✓	✓
Drag-and-drop environment	✓	
Reusable components	✓	
Pixel-perfect designs	✓	✓
IP restrictions	✓	✓
Access to data, such as cases, leads, and opportunities	✓	✓
Ready-made forms	✓	
CMS	✓	
Programmatic page creation (using Apex, APIs, and controllers)		✓
Web applications		✓
Analytics, reports, and workflows		✓
Full Force.com platform capability		✓

*Available in Community Builder for Communities users only.

To learn more about Community Builder, Force.com, and Site.com technologies, see:

- Community Builder Overview
- Force.com Sites Overview
- Site.com Overview

SEE ALSO:

Use Community Builder With Templates

Use Community Builder (Site.com) Without Templates

Use Visualforce and Force.com Sites

Use Community Builder With Templates

Community Builder in conjunction with community templates for self-service lets you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

With Community Builder and templates you can:

- Quickly style the community to match your company's branding.
- Edit community pages and components with the Community Builder to customize their design and content.
- Preview your community to ensure that it appears correctly on different devices.
- Publish your changes to make them available to everyone in your community.
- Apply template updates to your community as soon as they become available.

You can use the Community Builder to customize communities created using these templates:

Kokua
A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

Koa
A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

Napili
A powerful, responsive self-service template that lets users post questions to the community, search for and view articles, and contact support agents by creating cases. Supports Knowledge, Cases, and Questions & Answers.

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

To access Community Builder and continue customizing your community or update its template version:

1. From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**.
2. Next to the community name, click **Manage**.
3. Click the Community Management menu in the global header, then click **Go to Community Builder**.
4. In Community Builder, you can:
   - Brand your community on page 89
   - Edit community pages and page components.
   - Update your community template.

Note: Community Builder doesn't support branding for sites that weren't created using one of the preconfigured templates. Instead, you must use Site.com Studio To get there, click Site.com Studio from the Communities menu in the toolbar.

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

SEE ALSO:

Choosing Between Community Builder and Force.com Sites

Use Community Builder (Site.com) Without Templates

Each community has one associated Site.com site that lets you add custom, branded pages to your community. By default, Site.com pages are publicly available and don't require login, but you can also create private pages that only community members can access.

For more detailed information about using Site.com, check out the online help.

Before You Begin

Communities users with the "Create and Set Up Communities" permission automatically have full site administrator access to a community's Site.com site. To let Communities users without the permission edit the site, you must purchase and assign either a Site.com Publisher or a Site.com Contributor feature license, and assign a user role at the site level.

See About Site.com User Roles.

Tips and Considerations

- Communities users with the "Create and Set Up Communities" permission are assigned the role of site administrator in a community's Site.com site. However, they don't appear in the User Roles section on the Overview tab of Site.com Studio.
- You can't create, delete, or duplicate community sites in Site.com.
- When working with data-bound components, such as data repeaters and forms, keep in mind that the objects listed may not be available to site visitors. For authenticated visitors, object access on public and private pages is controlled by their user profiles. For unauthenticated visitors, object access on public pages is controlled by the site's guest user profile.
- When adding forms to authenticated community pages in Site.com, set the current user for Salesforce objects that require the Owner ID field. Setting the current user (as opposed to the default guest user) lets you identify the authenticated user when the form is submitted. To set the current user for the Owner ID field, select the field in the form, click **Configure** under Field Properties in the Properties pane, select `Global Property` as the source, and select `Current userID` as the value.
- The home page, 404 page, login page, and self-registration page that you specify for Site.com Community sites in Site Configuration set the default pages for the Site.com Community site. These default URLs are used unless you specify different URLs in Community Management under **Administration** > **Pages** and **Administration** > **Login & Registration**. Community error pages are specified in Force.com Setup, under Error Pages.
- When your Site.com Community site is inactive, users are redirected to the Service Not Available page defined in Community Management under Pages.
- The contributor's view is not available by default for Site.com Community sites. However, you can use a Site.com Contributor license to grant contributor access to a specific user. See *About Feature Licenses* in the Site.com help for details. Alternatively, a user can preview the Site.com Community site as a contributor by appending `?iscontrib` to the site's URL. For example: `https://sitestudio.na1.force.com/?iscontrib`

SEE ALSO:

Choosing Between Community Builder and Force.com Sites

Use Visualforce and Force.com Sites

Each community has one associated Force.com site that lets you make advanced customizations to your community. For example, with Force.com Sites you can:

- Add public pages to your community that don't require login.
- Use branded self-registration and login pages to enable users to register for or log into your community.
- Customize out-of-the-box error pages to reflect the branding of your community, including "Authorization Required (401)" and "Page Not Found (404)" pages.
- Leverage Visualforce pages to create private pages that only community members can access.

For detailed information about using Force.com Sites, refer to the online help.

Tips and Considerations

- Force.com Sites pages automatically include the branding styles you specify in the Create Community wizard. To disable these styles, set the `standardStylesheets` attribute on the `<apex:page>` tag to `false`.
- Consider these limitations when using Force.com Sites with Communities:
  - Out-of-the-box RSS feeds, analytics tracking, and custom portal profile pages aren't available.
  - Custom change-password pages aren't available.
  - Login to custom domains is only available with HTTPS.
- Because Force.com sites are served directly from the Force.com organization, a site's availability is directly related to the organization's availability. During your organization's maintenance window for major releases, your sites will be unavailable; users who try to access a site will see a Force.com-branded maintenance page or your custom Service Not Available Page.
- You can redirect a community home page to its companion Site.com home page. To do this, set a URL Redirect on the Force.com site detail page. Set the Source URL to `/`, which represents the home page for the community, and set the Target URL to `s`, which represents the home page for the Site.com site.

SEE ALSO:

Choosing Between Community Builder and Force.com Sites

Custom Community Pages

Override Default Pages in Your Community with Custom Pages

Use company-branded Community Home and Service Not Available pages by overriding the standard pages in your community.

- Use a Custom Community Home Page
- Use a Custom Page for Service Unavailability

You can override other default community pages in the Site.com or Force.com settings for the community. To do this, click the Community Management menu in the global header and then click **Go to Force.com** or **Go to Site.com Studio**. Page selections in Community Management automatically override any previously specified page selections in the Site.com or Force.com settings.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Use a Custom Page for Service Unavailability

On rare occasions, if your community is not available because of a service outage, Salesforce displays a generic Service Not Available page with Force.com branding. You can replace this page with a custom company-branded static resource page for a personalized user experience for your community members.

The Service Not Available static resource:

- Must be a public .zip file 1 MB or smaller.
- Must contain a page named `maintenance.html` at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

For more information, refer to *Assigning Force.com Site Error Pages* in the Salesforce Help.

1. Access Community Management in either of the following ways.
   - From the community, click in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Navigate to **Administration** > **Pages**.
3. Click next to **Service Not Available** to search for and select your custom page.
4. Click **Save**.

If there is a service outage at any time, your community displays your selected page. A couple things to keep in mind:

- This page selection doesn't affect communities that use Site.com Studio pages.
- The Service Not Available page, once customized, is available for all communities in the same domain. Depending on the needs of your organization, this might not be desirable. To avoid using the same page for all the communities in your domain, create and assign separate Service Not Available pages for each community.

  For example, consider a scenario where you have two communities in your domain: a customer community (`universaltelco.force.com/customer`) and a partner community (`universaltelco.force.com/partner`). If you use a custom Service Not Available page for only the customer community, then the partner community will display the same page during a service outage, unless you create and assign a separate Service Not Available page to the partner community.

SEE ALSO:

Override Default Pages in Your Community with Custom Pages

Use a Custom Community Home Page

Personalize the standard community home page with company branding by using a custom Community Builder (Site.com Studio) or Visualforce page.

The community home page is shown to unauthenticated users in a public community and it allows you to specify a landing page for guest users without setting up redirects. This page is also known as your Active Site Home page.

1. Access Community Management in either of the following ways.
   - From the community, click in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Pages**.
3. For the Community Home page:
   a. Select the page type: **Community Builder** or **Visualforce**).
   b. Enter the name of the page or leave the field blank to get a list of available options.
   c. Click , then click the name of the page in the search results to select it.

      Note: Only published Community Builder (Site.com Studio) pages are included in the search results.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Page selections in Community Management automatically override any previously specified page selections in the Site.com or Force.com site properties.

SEE ALSO:

Configure the Default Community Login Page to Use a Custom Home Page

Override Default Pages in Your Community with Custom Pages

Configure the Default Community Login Page to Use a Custom Home Page

If you're using external authentication providers and a custom home page, ensure that users are accessing the correct home page.

To do so, edit the `CommunitiesLandingController` so that it has the correct `startURL` for your community. The `CommunitiesLandingPage` is the Active Site Home Page for your community, meaning that it is shown when someone enters a direct URL to your community. For instance, if your domain is *`universaltelco.force.com`* and your community URL is *`customers`*, the `CommunitiesLandingPage` is shown when someone enters `http://universaltelco.force.com/customers`.

There are 2 methods for using a custom home page:

- Update the `CommunitiesLandingController` code to redirect to the new page:
  1. From Setup, enter *`Apex Classes`* in the `Quick Find` box, then select **Apex Classes**.
  2. Click **Edit** next to `CommunitiesLandingController`.
  3. Replace the code so that it reads:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access Community Management:

- "Manage Communities" OR "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To customize administration settings:

- "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To edit Apex classes:

- "Author Apex"

```
public with sharing class CommunitiesLandingController {
        // Code we will invoke on page load.
    public PageReference forwardToStartPage() {
        String communityUrl = 'https://universaltelcom.force.com';
        String customHomePage = '/apex/hello';
        if (UserInfo.getUserType().equals('Guest')) {
```

```
            return new PageReference(communityUrl + '/login?startURL=' +
EncodingUtil.urlEncode(customHomePage, 'UTF-8'));
        }else {
            return Network.communitiesLanding();
        }
      }
        public CommunitiesLandingController() {}
    }
```

4. Replace *https://universaltelcom.force.com* with the URL for your community.
5. Click **Save**.

- Alternatively, you can replace the Active Site Home Page with a custom Visualforce page.
  1. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**.
  2. Click the **Manage** button next to thecommunity name.
  3. Click **Administration** > **Pages** > **Go to Force.com**.
  4. In the Site Detail section, click **Edit**.
  5. In the Active Site Home Page field, select your custom Visualforce page.
  6. Click **Save**.

When a user enters the community URL, they see the new Active Site Home Page.

SEE ALSO:

Use a Custom Community Home Page

Add Custom Pages That Don't Require Login

Within a community, you can have publicly available pages that are accessible without requiring login, making them ideal for landing or marketing pages.

Communities leverage Force.com Sites technology to set a custom domain for your organization and a URL prefix for each community created in your organization. If you want to further customize your communities beyond what's available in setup, you can use Force.com Sites or Site.com to create completely customized pages.

Tip: Communities can have a combination of Visualforce and Site.com pages. By default, the pages you create don't require login, but you can add authenticated pages if needed.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Pages** and then in the Advanced Customizations area, click either:
   - **Go to Force.com** to create pages that don't require login or edit out-of-the-box error pages.
   - **Go to Site.com Studio** to open Site.com Studio, where you can create public, branded pages. (You can also create authenticated pages that require login.)
3. After you create a public page in Site.com Studio, you must publish the Site.com site to allow users to access the page.

For more information about creating pages, refer to these resources:

- Creating Site.com Pages
- Managing Force.com Site Visualforce Pages
- Managing Force.com Site Standard Pages

Customize Templates with Community Builder

Community Builder Overview

Community Builder in conjunction with community templates for self-service lets you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

EDITIONS

Available in: Salesforce Classic

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

With Community Builder, you can:

- Quickly style the community to match your company's branding.
- Edit community pages and components with the Community Builder to customize their design and content.
- Preview your community to ensure that it appears correctly on different devices.
- Publish your changes to make them available to everyone in your community.
- Apply template updates to your community as soon as they become available.

Community Builder works in conjunction with all of the preconfigured templates.

Note: If you don't want to use the preconfigured templates, you can still create a custom community in Site.com Studio. However, you won't be able to use Community Builder for branding.

To try out a different template, go back to Community Management and change your template selection. But don't worry—you can always switch back to the first template you chose. To switch back, set the home page back to its original URL in Site Configuration in Site.com Studio.

Known Limitations

- Community Builder doesn't support branding for sites that weren't created by using one of the preconfigured templates.

SEE ALSO:

Navigate Community Builder

Manage Your Community's General Settings in Community Builder

Implementation Guide: Using Templates to Build Communities

Navigate Community Builder

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

Note: Community Builder only supports branding for communities that were created with one of the Community Builder-based templates.

From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder** to brand and configure your community. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to the community name.

In Community Builder, you can:

- Brand the community to match your organization's style (1).
- Edit your community pages in the Page Editor to add, update, or remove page components (2).
- Manage, create, and delete community pages in the Page Manager (3).
- Accept updates to your community's template and edit community settings (4).
- Navigate to the community page that you want to style by clicking links and navigation menu items (5).
- Use the Communities menu (6) to:
  - Access Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
  - Go to Site.com Studio to add advanced community customizations.
- See how your community appears on different devices (7).
- Preview the community in a new browser window (8).
- Publish your changes to make your updates available to everyone in your community (9).

EDITIONS

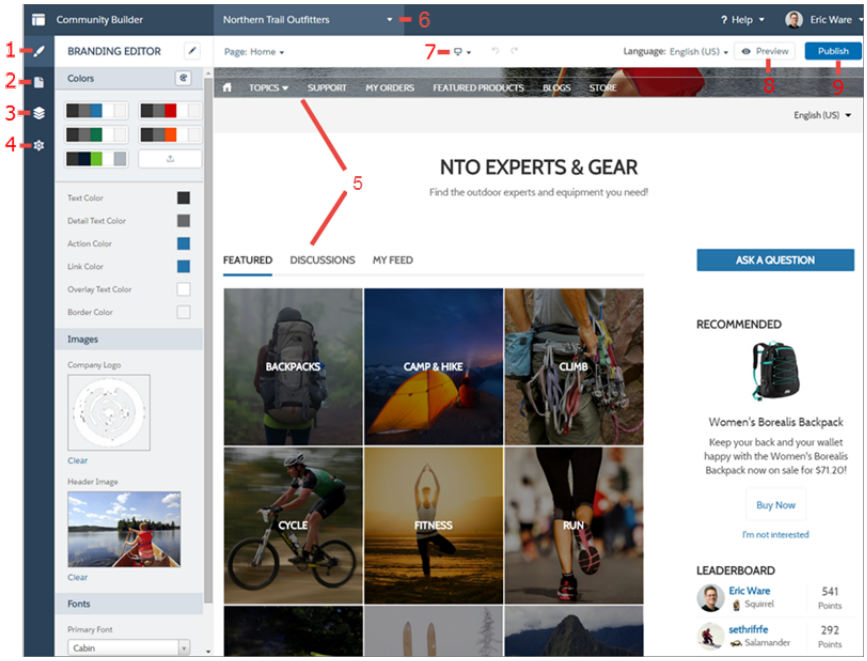
Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:

- "Create and Manage Communities"



SEE ALSO:

Community Builder Overview

Manage Your Community's General Settings in Community Builder

Implementation Guide: Using Templates to Build Communities

Brand Your Community with Community Builder

Use Community Builder's enhanced Branding Editor to efficiently apply color and style to your community. Choose a color scheme with the color palette, which provides a wide range of colorized text elements for a personalized design. Match your colors precisely by uploading your own logo to automatically generate a custom color palette.

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

Depending on the template that you select, you can use Community Builder to:

- Apply a color scheme that's appropriate for your template with the color palette.
- Choose colors for text, borders, and button backgrounds.
- Upload your own company logo image to generate a custom color palette based on its main colors.
- Maintain your own color palettes by saving or removing them as needed.
- Specify font family, style, and weight.
- Change header and page background color, font family, font size, and font color.
- Use custom CSS to apply your own styles

EDITIONS

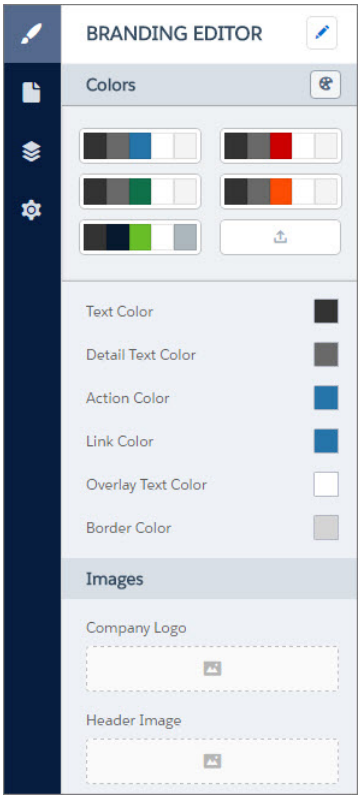
Available in: Salesforce Classic

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

USER PERMISSIONS

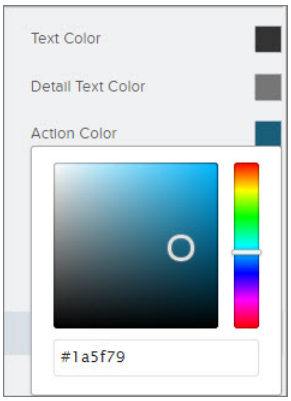
To create, customize, or publish a community:

- "Create and Manage Communities"



Note: The available branding options vary depending on the template that you're using and the page that you've selected.

When you upload your own logo to the Branding Editor, Community Builder extracts its colors behind the scenes, and suggests a set of colors based on those. To modify a suggested color, click the color swatch and adjust the color by using the slider or by entering hex values.



To brand your community:

1. Navigate to the pages that you want to view as you brand by using the Page menu in the toolbar.
2. Define styles, such as:
   - The range of colors that are used by the entire site, by selecting a palette swatch.
   - A specific color, by using the relevant color picker or entering a hex value.
   - An image, by clicking the image area and uploading an image.
   - The font type, size, or weight, by selecting an option in the relevant drop-down list.

Your changes are saved automatically and appear instantly on the page canvas.

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

SEE ALSO:

Community Builder Overview

Preview Your Community with Community Builder

Implementation Guide: Using Templates to Build Communities

Manage Your Community's Pages in Community Builder

Page Manager centralizes all your page-related needs, from page creation to deletion and everything in between.

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

In Page Manager (1), you can:

- Create custom pages (2).
- Delete pages (3).
- Select a page (4) to edit its properties (5).
- Set the active page (5).
- Create and manage alternative page variations of the selected page (6).

EDITIONS

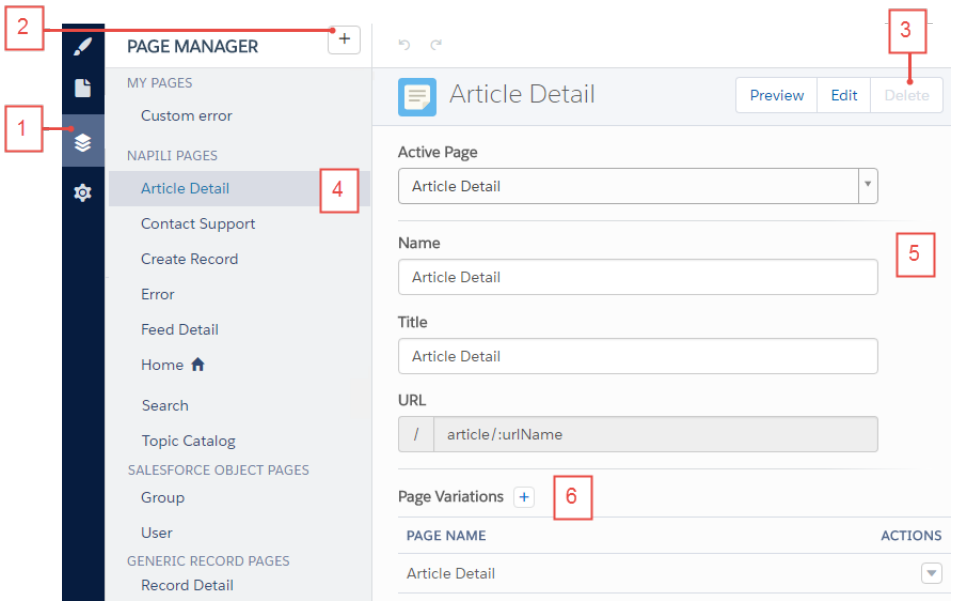
Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

- "Create and Manage Communities



Create Custom Pages with Community Builder

Extend your community template by creating custom pages and adding content that meets your unique business needs. And in the Napili template, you can also create custom record detail, list, and related list pages to get the most from your Salesforce data.

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

EDITIONS

Available in: Salesforce Classic

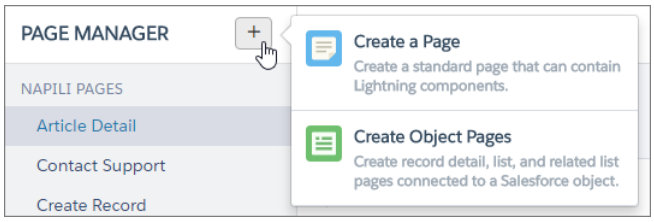
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create pages in Community Builder:

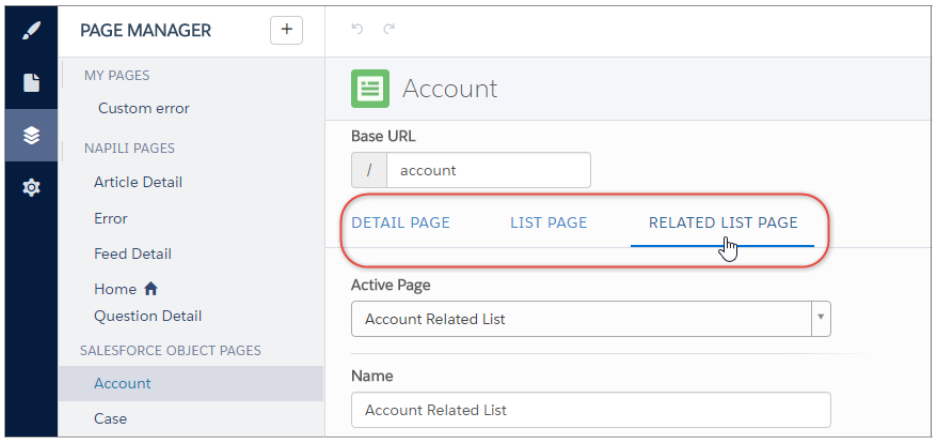
- "Create and Manage Communities

1. In Community Builder, click on the left sidebar to display the Page Manager.
2. Click + on the toolbar.
3. To create:
   - A blank standard page that's based on a layout or one of the template's pages, click **Create a Page**. For example, you could start with the Home page template and customize it to your needs. Give the page a unique name and specify the static portion of the page's URL.
   - A record detail, a list, and a related list page associated with one of your Salesforce objects, click **Create Object Pages** (in Napili only). Select the object that you want to associate with the page.



4. Click **Create**.
   Custom standard pages that are based on a layout appear under My Pages in Page Manager. Pages that are based on a default template page appear under its Page Variations section.

   Custom object pages appear under Salesforce Object Pages.



5. Open a standard page by clicking **Edit** on the toolbar, or open an object page by clicking > **Edit** in the Page Variations section.
6. Add and configure page components.

7. Preview and publish your community when you're done.

Tip:

- The Page Variations section lets you quickly create alternative versions of the selected page. For example, you could create three different Question Detail pages to test out various layouts or styles. New pages are based on the default template page—in this case, Napili's Question Detail page—and you can choose from several different layouts. To create a page variation, click + in the Page Variations section.
- Use the Navigation Menu component to create custom navigation nodes for new pages. For more information about templates and components, see *Using Templates to Build Communities*.

Set Active Pages for Your Community in Community Builder

You can create several custom pages for the same purpose, but only one can be active in your community at a time. For example, you could create three different Question Detail pages to test out various layouts or styles. When you select your preferred Question Detail page, you automatically deactivate the default Question Detail page defined in the template.

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

EDITIONS

Available in: Salesforce Classic

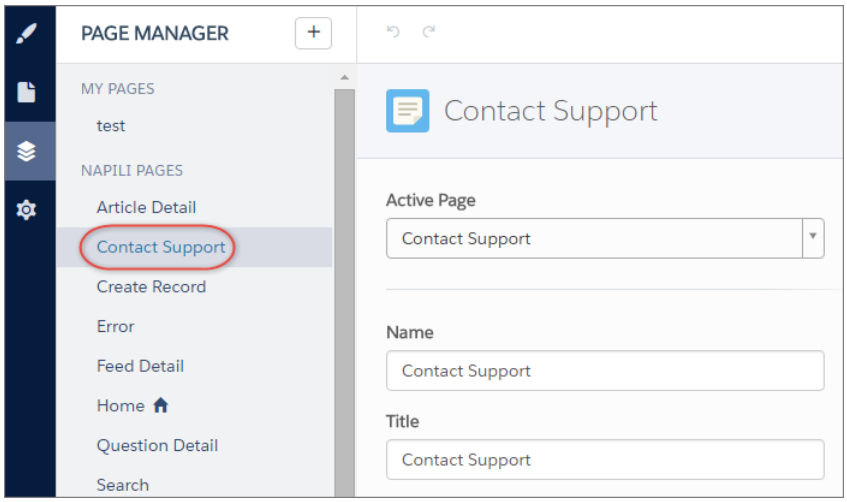
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize or publish a community:

- "Create and Manage Communities

1. In Community Builder, click on the left sidebar to display the Page Manager.
2. Select the page you want to update.

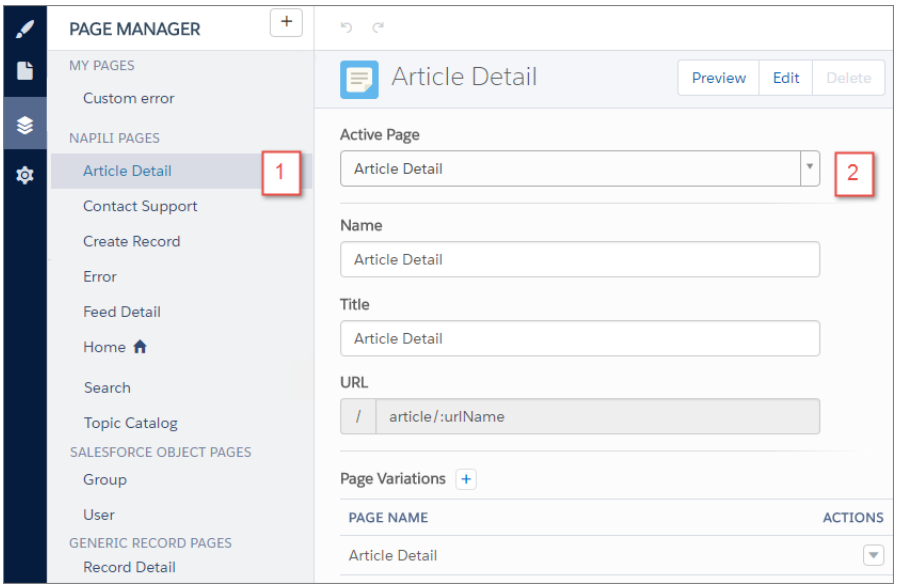


3. Select your preferred active page.
   Only the page selected in the Active Page drop-down list is visible in your community.
4. Preview your changes, and then click Publish to make your changes live in the community.

Inactive pages remain available to use in your community unless you delete them.

Page Properties and Types in Community Builder

Use Page Manager to view and edit the properties of the various pages that make up your community.



EDITIONS

Available in: Salesforce Classic

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

Page Types (1)

We've grouped your community's pages by type in Page Manager.

My Pages

The custom standard pages that you create. (Custom object pages appear under Salesforce Object Pages.)

Template Name *** Pages**

**Napili, Koa, Kokua, or Aloha*

The default pages that come with the community template.

Salesforce Object Pages

The pages of the objects in your community, which include the object's record detail, list, and related list pages.

Generic Record Pages

The default record detail, list, and related list pages that come with the Napili template only. These generic pages are used to display record information for a Salesforce object when custom object pages don't exist.

Login Pages

The default login pages that come with the community template.

Page Properties (2)

The properties available to each page depend on the page type selected.

Active Page

Lets you specify which page is active and visible in your community when you create several custom pages for the same purpose. For example, if you create a second Case Detail page and make it active, the default Case Detail page defined in the template is deactivated.

Name
The editable name of the page as it appears in Community Builder.

Title
The editable title of the page as it appears in the browser's tab or window title. Used for bookmarking the page and appears in search engine results.

Description
Used for SEO purposes and appears in search engine results. Available for the Contact Support, Error, Home, and Topic Catalog template pages, and all pages listed under My Pages and Login Pages.

URL
The URL of the page. Editable only in custom standard pages.

Base URL
Lets you simultaneously change the URLs for all pages—record detail, list, and related list—associated with an object. Promotes consistency by ensuring all object pages share a common URL prefix. Editable only in custom object pages.

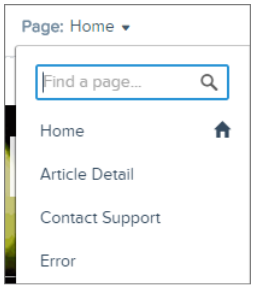
Edit Community Pages and Components in Community Builder

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

Note: Drag-and-drop components are available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

If you're adding components to a new custom page, spend some time planning the composition of the page based on the goals for the page.

1. In Community Builder, click on the left sidebar to display the Page Editor.
2. From the Page menu in the top toolbar, select the page that you want to edit.



The Lightning Components tab lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

3. Drag the required component from the Lightning Components tab onto an editable area of the page.
4. To edit the properties for a component on the page, select it on the main page canvas or on the Page Structure tab.
When you select a component, Community Builder highlights the component with a blue border and displays the component's properties in the Property Editor on the right.
5. Update the component as required.

EDITIONS

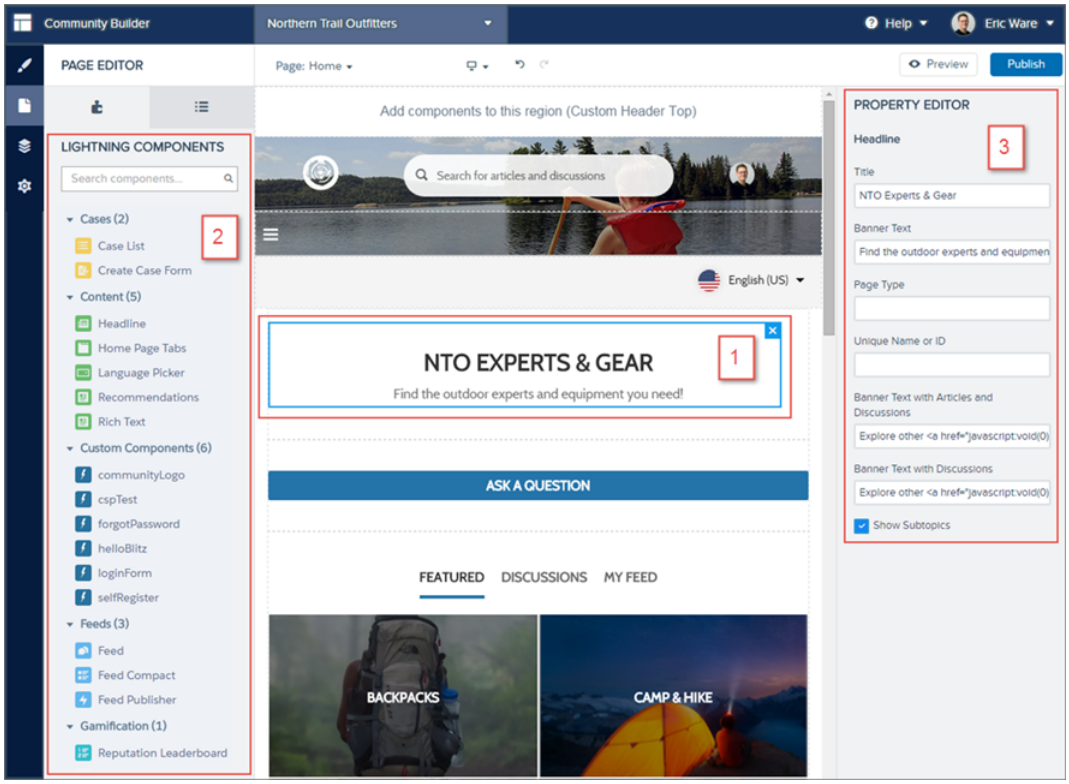
Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:
- "Create and Manage Communities

Example: Here's a sample configuration of the Headline component (1) on the Home page with the list of supported Lightning components (2) and properties (3).



Tip: You can also create custom Lightning components and use them on community pages. For more information on creating custom Lightning components and enabling them for Community Builder, see the *Lightning Components Developer's Guide*.

Change the Page Layout in Community Builder

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

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

1. In Community Builder, click  on the left sidebar to display the Page Editor.
2. From the Page menu in the top toolbar, select the page that you want to edit.

EDITIONS

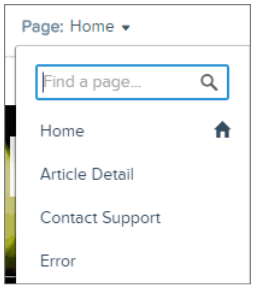
Available in: Salesforce Classic

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

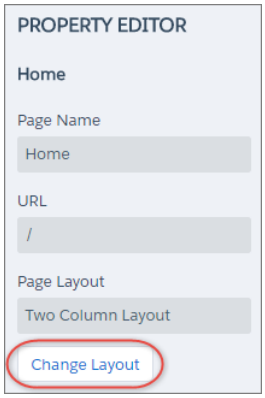
USER PERMISSIONS

To customize or publish a community:

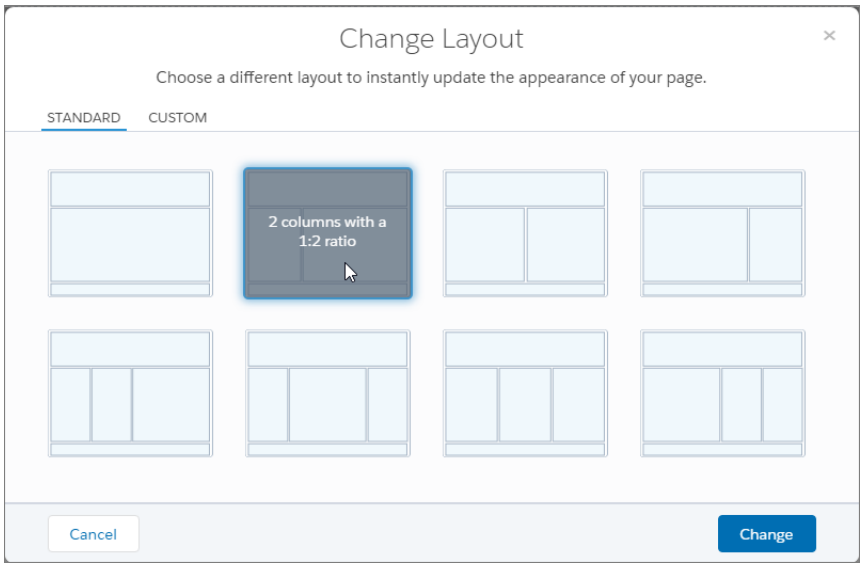
- "Create and Manage Communities



3. Click **Change Layout** in the Property Editor.



4. Select the new layout. If you've added a custom layout, you can access it in the Custom tab.



5. Click **Change**.
   If the structure of the new layout is different from the current layout, some regions won't be visible. However, the regions are still available and you can switch to a different layout at any time.

   Note: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

For more information on custom layouts, see the *Lightning Components Developer's Guide*.

Add Markup to the Page `<head>` to Customize Your Community

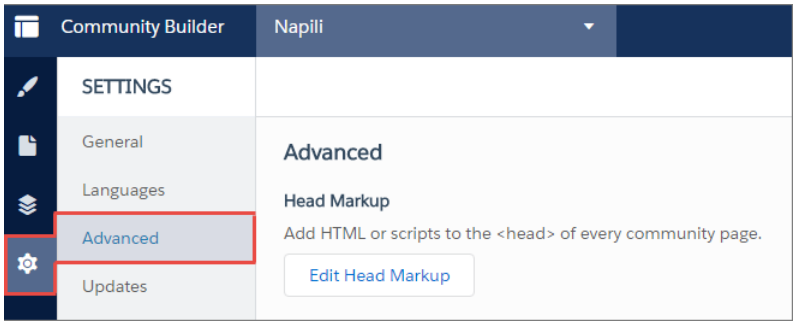
Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Community Builder.

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

For example, you can customize your community's pages to suit your needs by adding:

- Custom analytics code, such as Google Analytics™
- SEO meta tags that are visible only to search engines
- References to external JavaScript files and third-party libraries
- Custom JavaScript blocks
- A *favicon* or web page icon

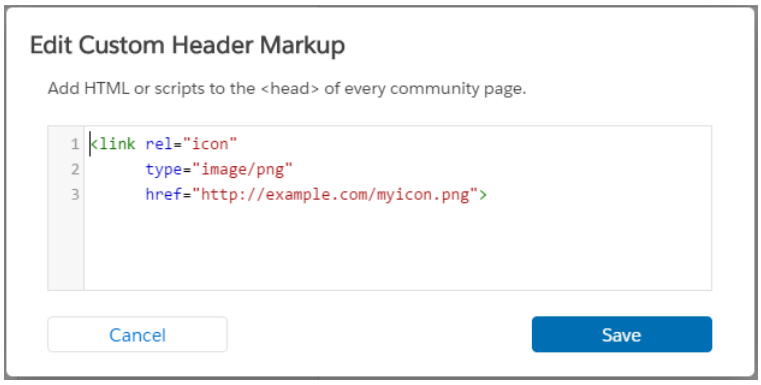
1. In Community Builder, click on the left sidebar and click **Advanced**.



2. Click **Edit Head Markup**.
3. Enter the required HTML or JavaScript.
4. Save your changes.

   When you add custom markup, the code is added to the `<head>` of every page.

Example: Here we've added HTML to include a favicon on our community's pages.



EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

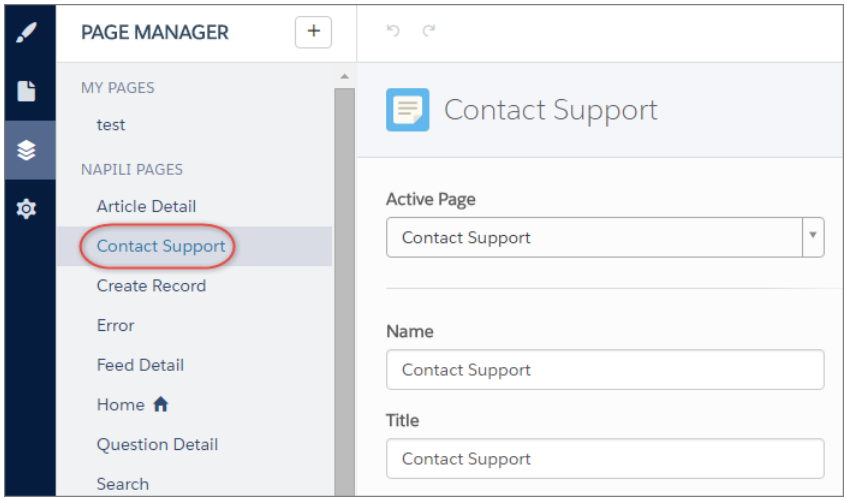
- "Create and Manage Communities

Delete a Community Page in Community Builder

Remove a community page that you no longer need by deleting it from the Page Manager in Community Builder.

You can delete only inactive community pages. You can't delete an object page (record detail, list, or related list) if it's the only page associated with a given Salesforce object. If you have more than one object page for the same object, you can delete the inactive one.

1. In Community Builder, click on the left sidebar to display the Page Manager.
2. Select the page that you want to remove.



3. Click **Delete** on the toolbar or click > **Edit** in the Page Variations section.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

- "Create and Manage Communities

Share More Salesforce Object Data in Your Community

Napili allows you to share record data for accounts, cases, contacts, tasks, events, and custom objects with minimal configuration. Record data respects user permissions via licenses, profiles, permission sets, and sharing rules.

Note: This functionality is available in the Winter '16 and later versions of the Napili template.

- Create a list of records and link to it.
- Display record details in your community with the out-of-the-box Record Detail page or create a custom page.

  You can also add groups to your community in the same way.

SEE ALSO:

Using Templates to Build Communities

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:

- "Create and Manage Communities"

Share a List of Records in Your Community

Create record list views for accounts, cases, contacts, and custom objects and link to them from the Napili navigation menu. Use an out-of-the-box or custom page layout to display the list of records.

EDITIONS

Available in: Salesforce Classic

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

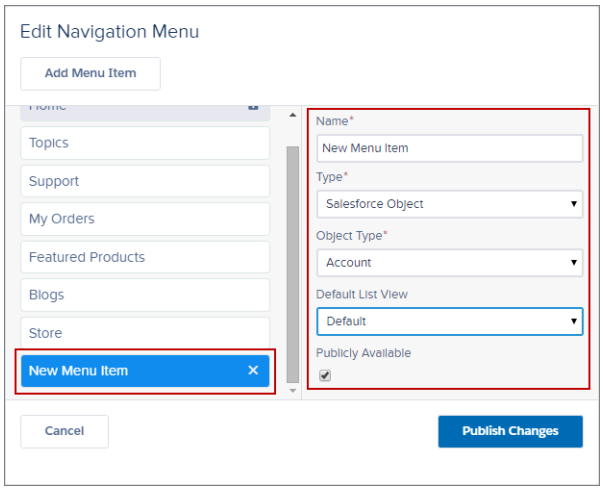
USER PERMISSIONS

To create, customize, or publish a community:

- "Create and Manage Communities"

Note: This functionality is available in the Winter '16 and later versions of the Napili template.

1. In Community Builder, drag and drop the Navigation Menu component to add it to the appropriate page in the template. We recommend adding it to the Home page.
2. Create a navigation menu item pointing to a supported Salesforce object. Currently, Napili supports accounts, cases, contacts, and custom objects.



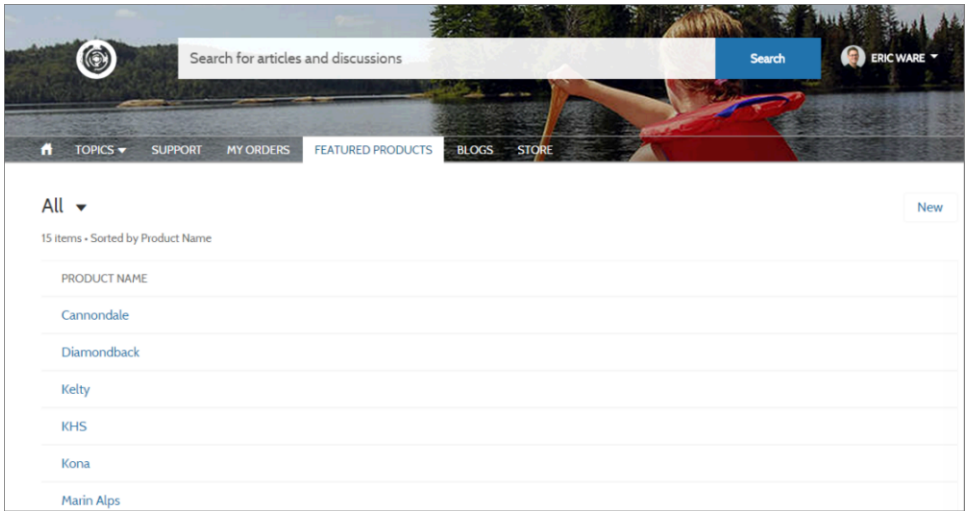
3. Publish your changes.

Note: If your community is active, your navigation menu item changes will immediately appear to your community members.

That's it! This creates a navigation menu item, which links to a list of the selected object's records. Under the hood, your data is retrieved from Salesforce and displayed using the generic Record List page. This page is available out-of-the-box in Napili and uses the Record Home List View Lightning component to display data in an appropriate layout.

Note: The generic Record List page provides the default list view layout for objects that don't have a predefined or custom list view page assigned. For example, if you create a navigation menu item for another Salesforce object, it uses this same page. If you modify the Record List page, be sure to account for all the affected objects.

Example: A list view page for a custom object called Featured Products.



- Creating a navigation menu item is the easiest way to link to a list of records for an object. If you prefer to use a custom list view page for an object, you can create a new page for your community using Community Builder. Choose the Standard page type with a single-column layout. Add the Record Home List View component to the page, configure the component properties to point to the object, and then publish the page. To link to the page, create a custom navigation menu item and use the internal page URL.
- Users can access only records they have access to via licenses, profiles, permissions, and sharing rules, same as in Salesforce. Users with the "Create" permission for the object can create records from the list view page. The ability to create records from this page isn't supported on mobile devices.
- You can hide a navigation menu item from guest users to block access to the associated record list view page.
- When users click a record on this page, the record details are displayed using the layout from the generic Record Detail page. If you create a custom record detail page and assign it to the object, we use that page instead.
- Clicking a record in the list view displays the record details, which are displayed using the Record Detail page that comes out of the box with the Napili template.
- The Record List page and the Record Home List View component are not available in the Koa and Kokua templates.

SEE ALSO:

Using Templates to Build Communities

Display Record Details in Your Community

Display record details using the generic Record Detail page or create custom record detail pages.

Note: This functionality is available in the Winter '16 and later versions of the Napili template.

Napili supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (that uses a preassigned case detail layout) and clicks on a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Headline and Record Information Lightning components to display record data.

- **Record Headline**: Displays the record name and key record highlights along with buttons to edit and delete the record.
- **Record Information**: Displays all record details including related records and the record feed. It also allows users to create new related records and post to the record feed.

Optionally, you can create custom record detail pages for accounts, contacts, cases, tasks, events, and custom objects.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

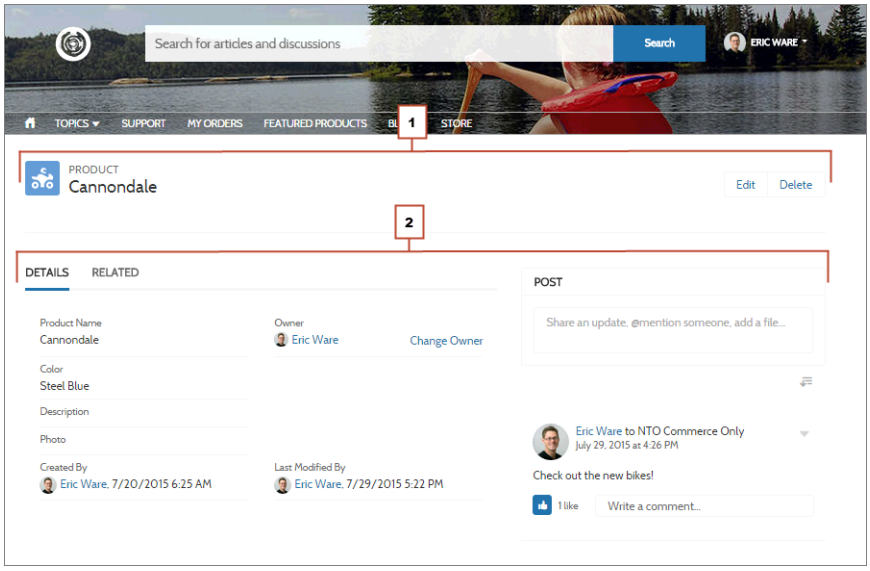
To create, customize, or publish a community:

- "Create and Manage Communities"

1. Create a new Data Detail page in Community Builder and pick a supported object.
2. Add the Record Headline and Record Information components to the page and configure the component properties from the Property Editor on the right.
3. Click to access Page Management in the Community Builder settings, and then select the custom page as the active page for the object.
4. Publish your changes.

   Note: If your community is active, your navigation menu item changes will immediately appear to your community members.

Example: The record detail page for a custom object with the Record Headline (1) and Record Information (2) components.



- Some objects have preassigned, active record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Community Builder settings, under Page Management.
- Objects without preassigned record detail pages use the generic Record Detail page. If you modify the Record Detail page layout or configuration, be sure to account for all objects that use this page layout.
- Users without the necessary license, profile, and permissions can't access record data.
- Users with the necessary permissions can create records from the related lists, and edit and delete the record from the record headline. These actions aren't supported on mobile devices.
- Page layouts for each object in Salesforce determine what fields display in the Record Information component, and the fields in the Highlight Panel layout determines what displays in the Record Headline component. This feature includes support for record types.
- You must enable feeds on records in Salesforce to allow users to post on them in communities.
- The Record Detail page, the Record Headline component, and Record Information component are not available in the Koa and Kokua templates.

SEE ALSO:

Using Templates to Build Communities

Add Groups to Your Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Napili community. Use the out-of-the-box design for groups in Napili, or create your own customized version of the group detail page using separate components.

Note: This functionality is available in the Winter '16 and later versions of the Napili template.

1. To enable groups in your community, add groups to the community navigation menu.

   This automatically displays a menu item that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of active public groups.

EDITIONS

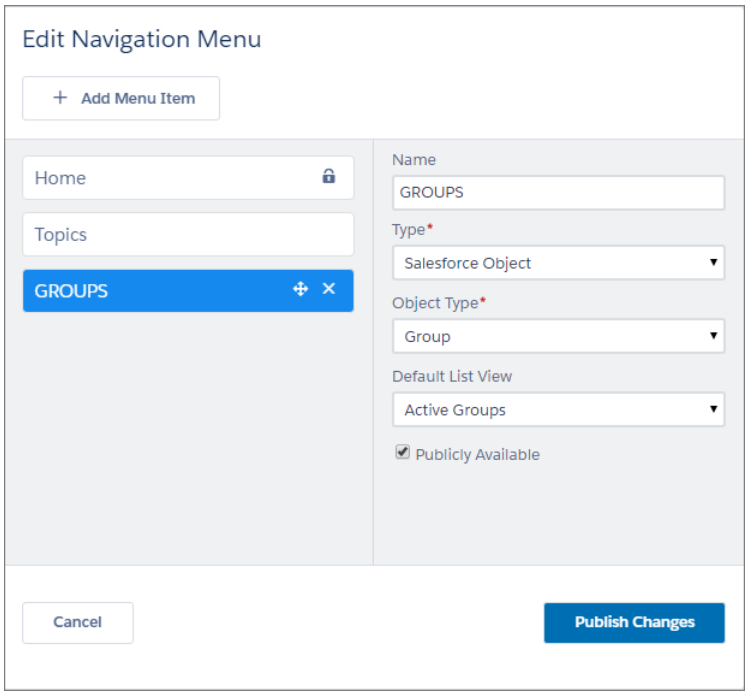
Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:

- "Create and Manage Communities"



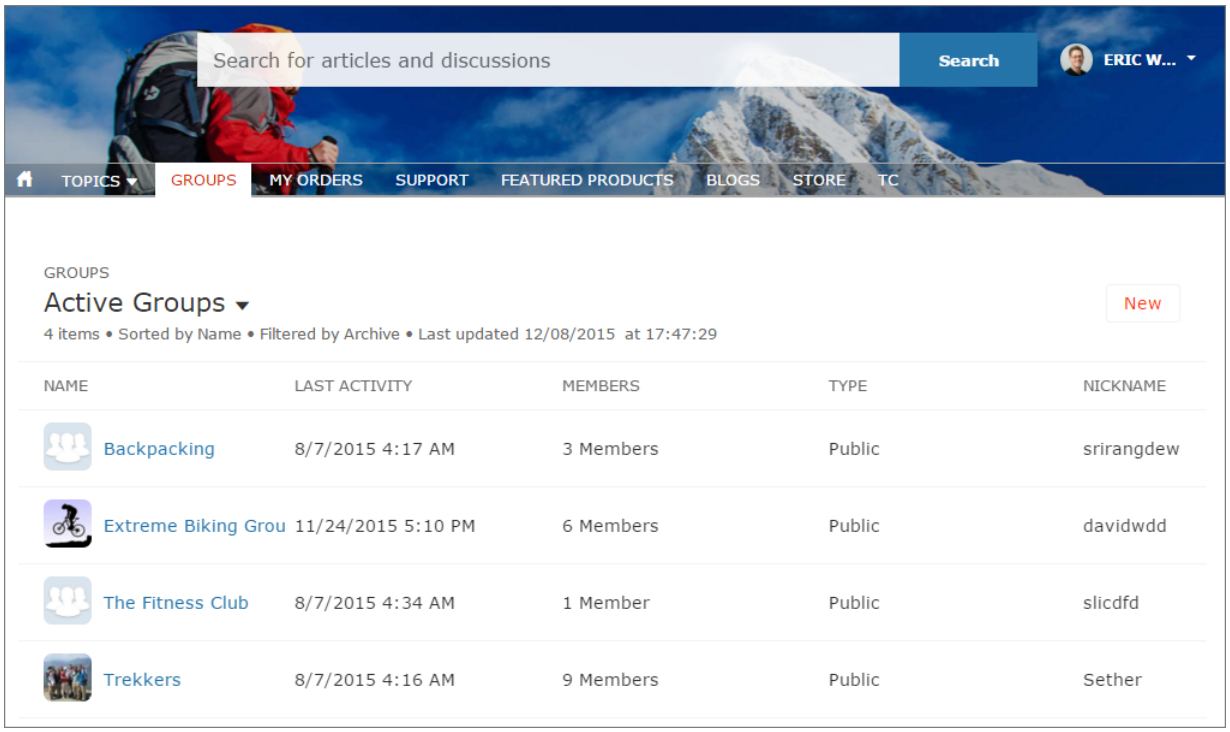
2. Publish your community.
3. If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

When users click on the name of an active group in the community, they're redirected to the group detail page. If it's a private group, they're asked to log in. Only logged-in group members can view private group content.

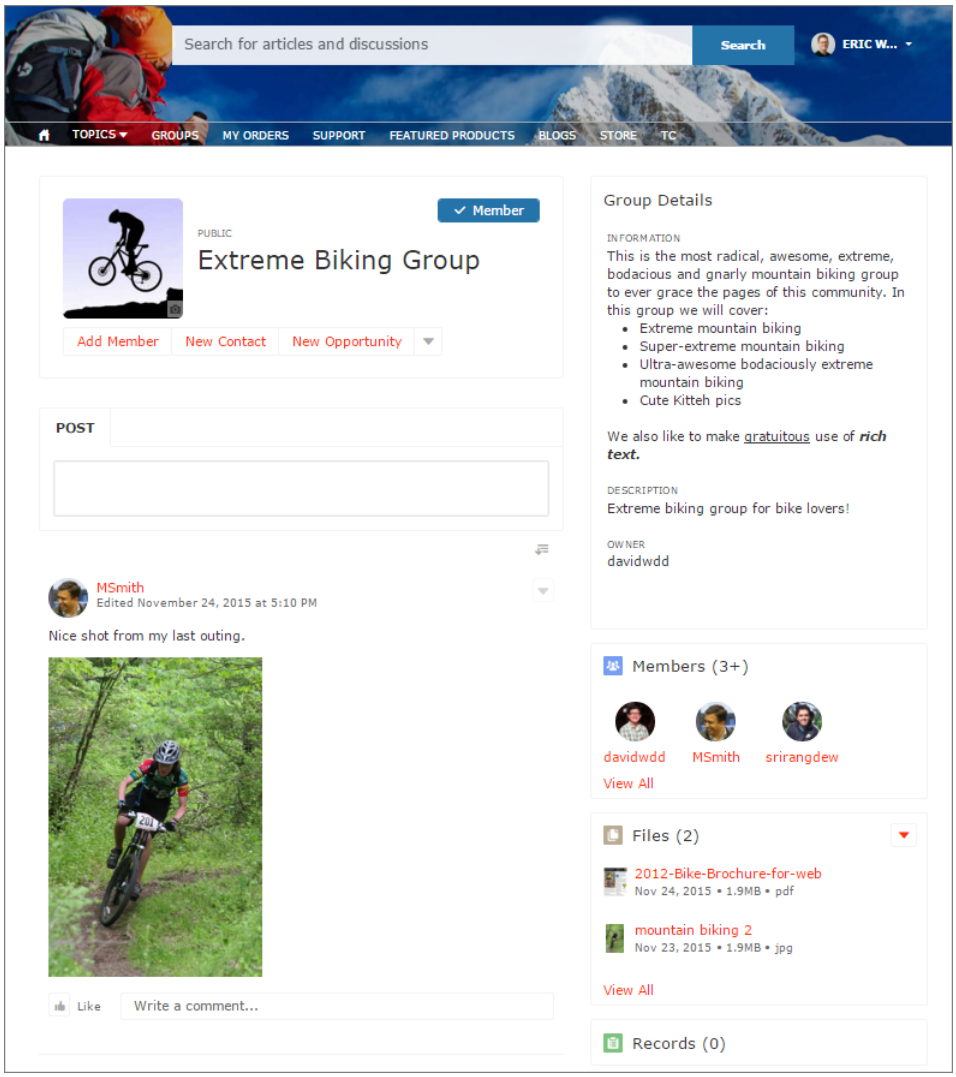
A few things to keep in mind:

- When you enable groups in your community, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and the group feed. We recommend using this composite component, especially if you want your community pages to be responsive across desktop and mobile device browsers.
- If you prefer to use a different layout or want more granular control over the placement of group content, create a custom community page and use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages might not be responsive across all devices.
- Group announcements aren't supported in communities.

Group list in Napili



Group detail page in Napili



Manage Your Community's General Settings in Community Builder

Use the General settings page to track which template you're using, view your community's status, and customize your template. If you're using the Napili template, easily access your navigational and featured topic settings.

You can manage these general settings for your community from within Community Builder when you use any of the preconfigured community templates provided by Salesforce.

To access general settings in Community Builder, click  on the left sidebar and then click **General**.

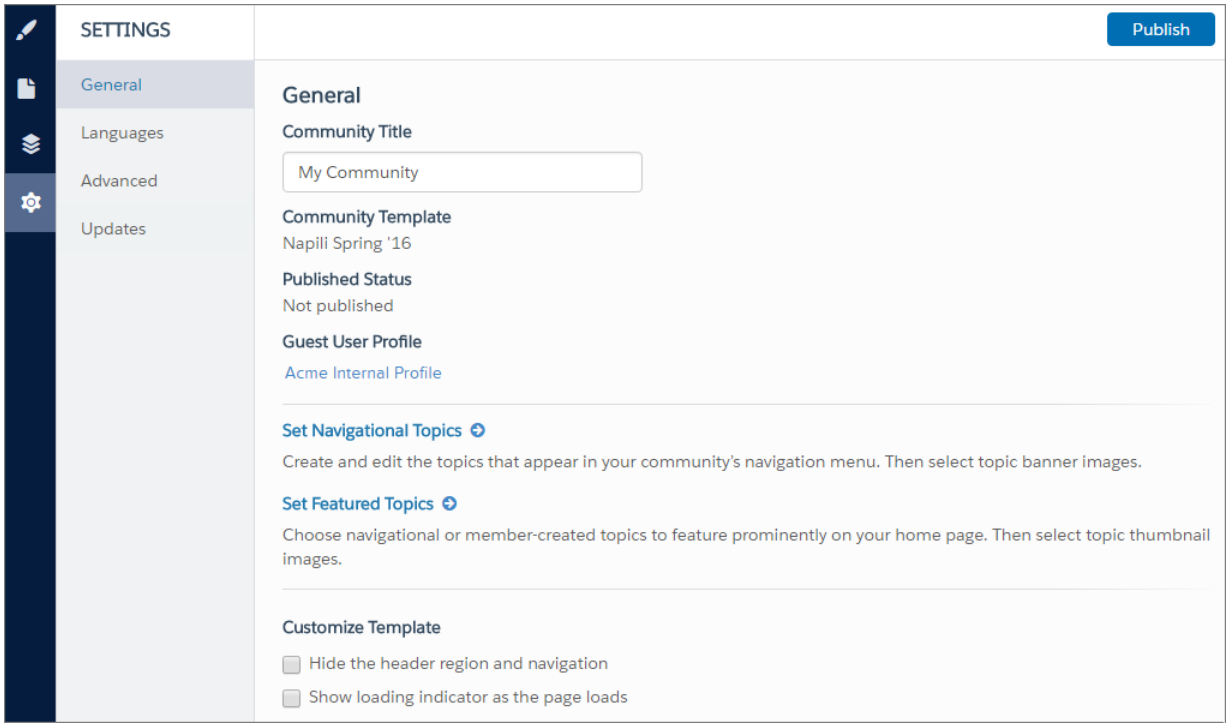
EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify general settings
- "Create and Manage Communities"



General settings include:

- **Community Title**

  Lets you set the title for your community. The title briefly appears in the browser's title bar before your community's Home page loads.

- **Community Template**

  Displays the name and version of the template that your community is using.

- **Published Status**

  Indicates whether your community is published. If it's published, click the link to open the live community in a separate browser tab.

- **Guest User Profile**

  Displays the associated guest user profile. Clicking the link takes you to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see "Configure the Guest User Profile for Unauthenticated Users" in the *Community Templates for Self-Service Implementation Guide*.

- **Set Navigational Topics** *(Napili template only)*

  Click the link to go to Community Management, where you can define topics to be used for navigation.

- **Set Featured Topics** *(Napili template only)*

  Click the link to go to Community Management and define featured topics.

- **Hide the header region and navigation** *(Napili Winter '16 and Koa, Kokua, and Napili Spring '16 versions only)*

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

- **Show loading indicator as the page loads** *(Napili Spring '16 version only)*

Displays a ghost version of your community page until the page loads completely, which enhances the loading experience. If the page header is highly customized and the ghost version varies vastly from the real version loading in the browser, you can disable this option.

Update Your Community's Template in Community Builder

Take advantage of the latest Koa, Kokua, Napili, and Aloha templates, which use Lightning technology and components to deliver better performance and a richer visual experience.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update your template

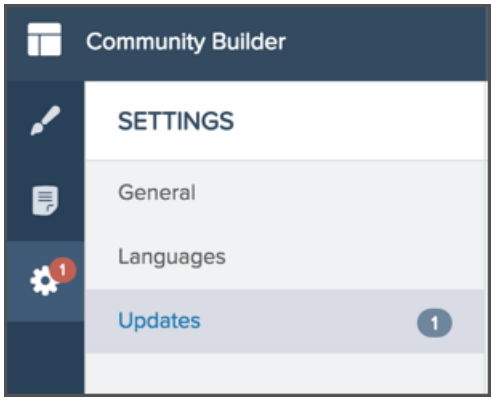
- "Create and Manage Communities"

Note: If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template, we strongly recommend that you update to the latest template version. Customer support for older templates is being discontinued in the Summer '16 release (May 2016). Also, many powerful Community Builder and template features require the latest versions of these templates.

Here are some of the things to keep in mind before you update your template:

- If your community uses the Winter '16 Koa, Kokua, or Napili template, your customizations are maintained for all pages except the login pages, which retain branding but lose any custom code or component customizations.
- If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template:
  - Most component customizations and properties do *not* carry over. For the Koa and Kokua self-service templates, general settings (such as Category Group Name, Top-Level Category, and Company Name) carry over. For Napili, topic definitions carry over.
  - Most branding properties defined using the Branding Editor are maintained. However, some community colors might be reset to the default values. After you update the template, check the branding properties in Community Builder and update any that were reset.
  - When you update the template, the old version of your community is saved. To restore your community to the previous template version, go to Site Configuration in Site.com Studio and manually change the home page back to the old version.
- Your community's home page URL is preserved automatically without any configuration on your part. Users are transparently directed to the new home page when they access the community.
- Template updates for communities using the Salesforce Tabs + Visualforce template aren't managed from Community Builder.

When a template update is available, a red notification icon appears over the Settings icon in Community Builder. You don't have to apply an update when it becomes available; you can wait until you're ready.



To update your template:

1. From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder**. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to your community name.
2. Click **Settings** > **Updates**.
3. Click **Update** and confirm the update when prompted.
4. Review all community pages to make sure that your branding and styles are as you expect.
5. Publish your community to apply the template updates.

SEE ALSO:

Manage Your Community's General Settings in Community Builder

Community Builder Overview

Considerations for Changing Your Community Template

EDITIONS

Available in: Salesforce Classic

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

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

- You may need to change your community's template to see some new communities features introduced by Salesforce. If you want to keep your current template, you must switch to another template and then switch back to your current template. For example, let's say you are using the Napili template for your community. Salesforce introduces a feature that requires a change (*not* a simple update) to the template. You must switch your community's template to another template, such as Koa or Kokua, and then switch it back to Napili.
- Salesforce object data carries over, but all branding and component customizations do not. You'll need to redo all customizations.
- Switching between templates updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to a Community Builder template, or vice versus. For example, in Community Builder-based templates `/s` is appended to your URL. Be sure to update any links to your community with the new URL.

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

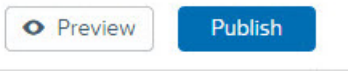
To learn more about using the Aloha template, see the *Getting Started with the Aloha Community Template for Salesforce Identity*.

Preview Your Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices.

Community Builder's preview option lets you see how your community will appear when it's live.

- To preview the community in a browser window, click **Preview** in the toolbar.



- From Preview mode, you can further opt to see the community in its own browser tab as a customer would see it by clicking the pop-out button next to **Preview**.

- Use the options in the menu to preview how the community looks on different devices:
  - For smartphones, click **Phone**.
  - For tablets, click **Tablet**.
  - For desktop computer screens, click **Fluid**.
  - For landscape or portrait orientation on a smartphone or tablet, click .

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:
- "Create and Manage Communities"

SEE ALSO:

Community Builder Overview

Publish Your Customizations with Community Builder

Implementation Guide: Using Templates to Build Communities

Publish Your Customizations with Community Builder

Publish your changes in Community Builder to make the updates available to everyone in your community.

Note: Your community must be active before you can publish the changes you've made in Community Builder.

1. From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder**. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to your community name.
3. Optionally, preview your community to make sure that your updates appear as expected.
4. When you're happy with your changes, click **Publish** in the toolbar to publish your changes.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:
- "Create and Manage Communities"

You'll receive an email notification when your changes go live.

SEE ALSO:

Community Builder Overview

Preview Your Community with Community Builder

Implementation Guide: Using Templates to Build Communities

Community Templates

Which Community Template Should I Use?

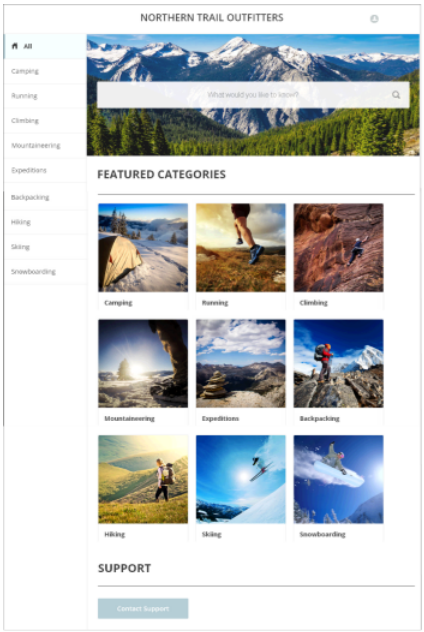
Community templates let you quickly and easily build a self-service community that gives customers the same visual and functional experience whether they use a tablet, a mobile device, or their desktop.

Your customers want an easy way to interact with your company whenever and wherever they are. A self-service community gives your customers an easy way access the information they need when they have questions. With communities built on the Koa and Kokua templates, customers can search for information using knowledge articles and contact support, if necessary. When they're in a community based on the Napili template, they can search for articles as well as ask questions and get crowd-sourced answers from the community. If they still can't find what they're looking for, they can contact support without having to log in. The self-service templates let you extend your community to various devices with a consistent user experience every time.

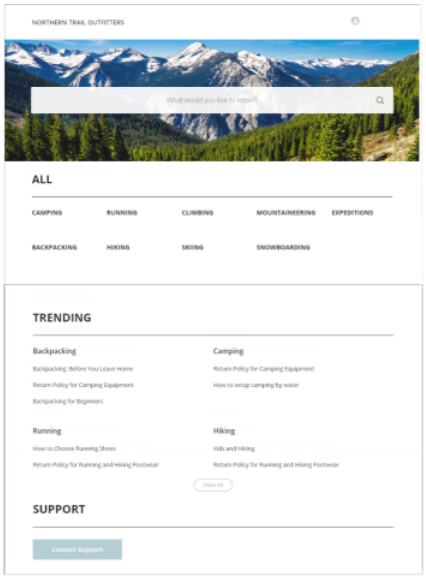
EDITIONS

Available in: Salesforce Classic

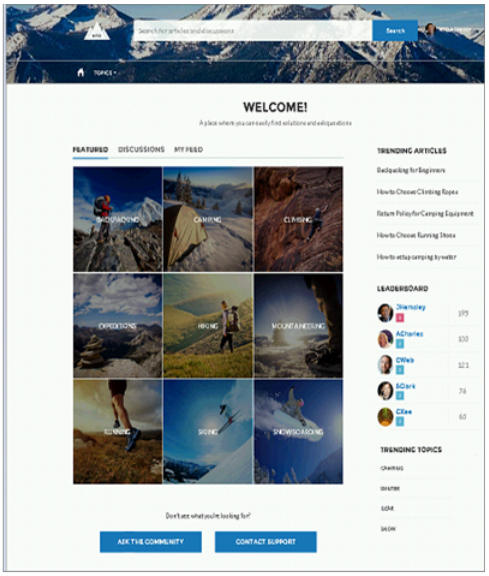
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Kokua



Koa



Napili

A wizard guides you through selecting a template and then walks you through the initial setup for your data categories or topics—depending on which template you're using.

- Kokua is a visually rich self-service template that presents users with knowledge articles organized by data categories. Users can also submit cases to get help from agents.
- Koa is a text-based self-service template that's optimized for mobile devices. It lets users search for and view articles by text representations of data categories, and contact support if they can't find what they're looking for.
- Napili is a powerful support community template that lets your customers post questions to the community and search for and view articles. If they don't find what they're looking for, they can contact a support agent.

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

Communities are automatically displayed in a logged-in user's profile language, so you don't need to create and manage a separate community for each language. With Community Builder, you can extend the support for Guest users in communities so that if their language isn't supported, they can choose one from a language picker on each community page. And because all languages are maintained within the community, you don't need to create and manage a separate community for each language.

SEE ALSO:

Create Communities

Compare Features Available in the Community Templates

Compare Features Available in the Community Templates

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

EDITIONS

Available in: Salesforce Classic

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

Feature Comparison

	Koa	Kokua	Napili	Salesforce Tabs + Visualforce
All Salesforce Objects				✅
Accounts			✅	✅
Campaigns			✅	✅
Cases	✅	✅	✅	✅
Community Builder	✅	✅	✅	
Community Discussions			✅	✅
Contacts			✅	✅
Custom Objects			✅	✅

	Koa	Kokua	Napili	Salesforce Tabs + Visualforce
Customizations using Lightning Components	✅	✅	✅	
Customizations using Visualforce				✅
Salesforce Knowledge	✅ Required	✅ Required	✅ Recommended	✅ Recommended
Knowledgeable People			✅	✅
Leads			✅	✅
Notes			✅	✅
Opportunities			✅	✅
Optimized for Mobile	✅	✅	✅	✅
Orders				✅
Question-to-Case			✅	
Recommendations			✅	
Reputation			✅	
Topics			✅	✅
Trending Articles	✅	✅	✅	

SEE ALSO:

Implementation Guide: Using Templates to Build Communities

Implementation Guide: Getting Started with Salesforce Communities

Objects Supported in the Napili Template

Check out the list of all objects supported by the Napili template.

EDITIONS

Available in: Salesforce Classic

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

Objects Supported in Napili

- Account
- Campaign
- CampaignMember
- Case
- CollaborationGroup
- Contact

- Custom Objects
- Event
- Lead
- Note
- Opportunity
- OpportunityContactRole
- OpportunityLineItem
- OpportunityTeamMember
- ProcessInstanceHistory
- ProcessInstanceStep
- ProcessInstanceWorkitem
- Task
- User

Napili Template Community Setup Checklist

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Napili template.

Have you considered everything on these lists?

EDITIONS

Available in: Salesforce Classic

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

Before you begin:

Gather your branding assets:

- [ ] High-resolution image of your company logo
- [ ] Color scheme (or an image to upload to automatically generate one)
- [ ] Image to use as a header
- [ ] Thumbnail images (385x385 pixels), if you're using Featured Topics

In your internal Salesforce org:

- [ ] Enable Salesforce Communities. Choose a unique URL that works for your business, because you can't change it after it's been set.
- [ ] Set up email templates for any communication between the community and its members (welcome email, resetting password email, etc.).
- [ ] Enable the Global Header for Communities for the system administrator profile, and any other profiles accessing your community from the internal org.
- [ ] Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge.
- [ ] Review profiles and add permission sets as needed.
- [ ] Set up Web-to-Case.

If you're using Salesforce Knowledge:

- [ ] Review your data categories.

- [ ] Enable feed tracking for your Knowledge article types.

As You're Making Your Community:

In your internal Salesforce org:

- [ ] Add members to your community.

Configure the Guest User Profile (access using Community Management or the Community Builder):

- [ ] Give read and create permissions for the case object.
- [ ] If using Salesforce Knowledge, give guests access to your data categories.

In Community Management:

- [ ] Set up navigational topics and subtopics, and associate articles to each topic.
- [ ] Set up featured topics and associated images
- [ ] Download the latest Salesforce Communities Management from the AppExchange.
- [ ] Set up moderation criteria and rules.
- [ ] Enable and set up reputation.

In Community Builder:

- [ ] Customize your community to match your company's branding.
- [ ] Add standard and custom Lightning components to customize their design and content.

After Making Your Community

- [ ] Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.
- [ ] Incorporate their feedback, and then publish your community.
- [ ] Seed the community with some initial content: welcome posts, groups, and relevant or fun articles.

Community Management

Community Managers, Moderators, and Administrators Working Together

Manage Your Community

USER PERMISSIONS		EDITIONS
To access Community Management:	• "Manage Communities" OR "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access	Available in: Salesforce Classic Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To customize administration settings or use Community Builder:	• "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access

Community Management is your one-stop shop for setting up and monitoring your community. Administrators can manage basic setup information including membership and branding. Community managers can view dashboards about groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

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

Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable **Show all settings in Community Management**.

Home

- View your community's home page dashboard. If your home page still displays a message to install the Salesforce Communities Management, your administrator hasn't mapped a dashboard yet.
- Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header.

Insights

Monitor recent activity and drill down to the source of that activity to take further action.

Insights are set up by the administrator. If the Insights menu doesn't appear, the administrator hasn't mapped any Insights for your community.

Dashboards

View dashboards and monitor information about groups, members, feed activity, moderation, topics, and license usage for this community.

Dashboards are set up by the administrator. If the Dashboards menu doesn't appear, the administrator hasn't mapped any dashboards for your community.

Moderation

View a list of posts, comments, and files that were flagged by community members for review. You can also set up moderation rules for your community.

Moderation is set up by the administrator. If the Moderation menu doesn't appear, the administrator hasn't enabled members to flag content.

To moderate flagged posts or comments within Community Management, you need "Moderate Communities Feeds". To moderate flagged files, you need "Moderate Communities Files".

Topics

Create a navigation menu and showcase popular topics in your community.

Navigational topics and featured topics are set up by the administrator or in the case of self-service templates, they are enabled by default. If the Topics menu doesn't appear, your community is not using Topics.

Recommendations

Recommendations can help drive engagement in a community. They can be set up to encourage users to watch videos, take trainings, and more.

Recommendations are set up by the administrator. If the Recommendations menu doesn't appear, the administrator hasn't set up any.

Reputation

Set up reputation levels and points to reward members for activity in the community feed.

Reputation is set up by the administrator. If the Reputation menu doesn't appear, the administrator hasn't enabled it.

Administration

On the Administration page, you can update basic setup for the community, including:

- **Members**—Add or remove members based on profiles or permission sets.
- **Tabs**—Select the tabs you want community members to see. Tabs are also used to determine community navigation in Salesforce1. Tab settings aren't used if your community was created with one of the Self-Service templates.
- **Branding**—Select an out-of-box branding theme. This branding is only used if your community uses the Salesforce tabs + Visualforce template.
- **Login & Registration**—Select the default community login page and set up self-registration.
- **Emails**—You can customize email sender information, Chatter email branding, and templates in your community emails.
- **Pages**—Configure page assignments for your community and access the Force.com and Site.com settings for your community.
- **Preferences**—Update important settings such as flagging content, nickname display, public access to Chatter, and file limits.
- **Settings**—Edit your community name, description, and URL. You can also manage the status of your community and change your community template.

Lookups in Community Management initially return the items you most recently viewed from within the community. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.

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

SEE ALSO:

What is a Community Manager?

What is a Community Moderator?

What is a Community Manager?

EDITIONS

Available in: Salesforce Classic

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

Every community needs someone to take an active role in making sure the community thrives. Community managers should spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

A community manager is a member of the community that takes on the extra responsibility of monitoring community engagement. Community managers need access to reports and dashboards that show trends in activity and membership. They also need to be aware if members aren't logging in as frequently as they should be. By monitoring community membership and activity, community managers can figure out how to engage community members and ensure that they participate.

A powerful tool for a community manager is the ability to recognize individual members for their participation, because community managers know that recognition and a little friendly competition usually lead to more active members. Community managers can set up a point system and reputation levels that reward members with points when they perform certain actions. Once the member reaches the top of the level's point threshold, they move up a level.

To assign a user as a community manager, simply give them the "Manage Communities" permission. With this permission, they can access the Community Management page. The user must be an employee of your organization; external community members can't be community managers.

SEE ALSO:

Assign a Community Manager

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

When you assign the "Manage Communities" permission to a user, they get access to all the community management features in the Community Management. Keep in mind that the user must be an employee of your organization; external users can't be community managers.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the "Manage Communities" permissions.
3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

SEE ALSO:

What is a Community Manager?

What is a Community Moderator?

Moderators help ensure the success of your community by monitoring user activity and flagged items.

In a successful community, members are actively engaged and communicating with 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.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the Chatter feed. This person should be accustomed to interfacing with customers, familiar with Salesforce and Chatter capabilities, and can spend time regularly monitoring the community.

A moderator can:

- Review and act on the list of flagged posts and comments in the community
- Review and act on the list of flagged files in the community
- Remove flags directly in the community
- Delete inappropriate posts, comments, private messages, and files

A moderator can also help drive the success of a community in many other ways.

- Sharing relevant and useful information in community posts
- Encouraging members to post and comment on each other's posts

- Setting an example by their activity in the community
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to communities when it can benefit other community members
- Establishing the community as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator for a community, especially if the community has a large number of members.

Note: Although they share some similar capabilities, a community moderator is different from a Chatter moderator.

SEE ALSO:

Assign a Community Moderator

Which users can moderate?

Which users can moderate?

There are multiple types of users who can moderate a community when flagging is enabled.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the Chatter feed. Moderators can continue to flag items even if flagging is disabled for community members, although group owners and group managers can only moderate when flagging is enabled.

Who can moderate items in a community depends on permissions or if the user is a group manager or owner. This table shows who can moderate and what actions they can take in the user interface.

EDITIONS

Available in: Salesforce Classic

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

Action	User with "Moderate Communities Feeds"	User with "Moderate Communities Files"	Group Owner or Manager (on items in groups they own or manage)
Remove flags on a post or comment	✔		✔
Delete a post or comment	✔		✔
Remove flags on a file		✔	✔
Delete a file		✔	✔

SEE ALSO:

What is a Community Moderator?

What is a Community Moderator?

Assign a Community Moderator

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the Chatter feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions:

Permission	Allows Users To
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the community feed and in Community Management.
Moderate Communities Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Community Management.
Moderate Communities Chatter Messages	Receive email notifications when private messages are flagged.
Manage Chatter Messages	View the contents of private messages.
Manage Communities OR Create and Set Up Communities	Moderate flagged posts and files from Community Management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

Once you grant moderator permissions to a user, they can help curate flagged content in the community.

- The user can now moderate any items they have access to in all communities they're a member of. The user can flag items even if `Allow members to flag content` is disabled in a community.
- When `Allow members to flag content` is enabled for a community, group owners and managers can moderate posts, comments, and files in groups that they own or manage. They can view flags and flag counts, remove flags, and delete content.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the `Flag an item as inappropriate` email notification.

Access to moderator functionality is slightly different depending on user permissions:

- **In the community feed**: Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.
- **In Community Management**: Only internal users with the"Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area in Community Management. The "Moderate Communities Feeds" permission grants users access to the **Flagged Posts** page and the "Moderate Communities Files" permission grants users access to the **Flagged Files** page.

SEE ALSO:

What is a Community Moderator?

Communities Moderation Overview

Enable Users to Flag Items in Your Community

Access Community Management

USER PERMISSIONS	
To access Community Management:	• "Manage Communities" OR "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access
To customize administration settings or use Community Builder:	• "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access

EDITIONS

Available in: Salesforce Classic

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

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

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

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Choose the part of the community you want to manage:
   - Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header.
   - In **Insights**, you can view Insights reports and take action on activity in your community.
   - In **Dashboards**, you can view community dashboards and reports.
   - In **Moderation**, you can set up moderation rules and monitor flagged feed items.
   - In **Topics**, you can manage navigational and featured topics.
   - In **Recommendations**, you can set up custom recommendations to appear in your community.
   - In **Reputation**, you can set up reputation levels and points.

- In **Administration**, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable **Show all settings in Community Management**.

Community Moderation Strategies and Tools

Communities Moderation Overview

EDITIONS

Available in: Salesforce Classic

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

Community moderation allows you to empower members of your community to monitor content and ensure that it is appropriate and relevant. You can also set up moderation rules and criteria to block, flag, and replace keywords in user-generated content, such as posts and comments.

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. You also need to empower members to speak up when they view something as inappropriate or offensive.

With Communities moderation, you can:

- Designate specific users as moderators so that they can closely monitor the community
- Allow members to flag posts, comments, files, and private messages that are inappropriate
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, or replace keywords in user-generated content, such as posts or comments
- Track flagging and moderation activity within your community

To limit the size and types of files allowed in your community, go to the **Administration** > **Preferences** page.

To report on moderation activity in your communities, query the flagged content or activity using the API or create a custom report type using `Networks` as the primary object. You can also install the Salesforce Communities Management package to view Insights reports that help you track moderated content in your community.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your users to flag content.

SEE ALSO:

Assign a Community Moderator

Enable Users to Flag Items in Your Community

Moderate Posts and Comments in Your Community

Moderate Files in Your Community

Moderate Private Messages in Your Community

Create Moderation Criteria for Your Community

Create Moderation Rules for Your Community

Enable Users to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and private messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

This setting isn't required to flag or moderate items using the API.

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**, then select `Allow members to flag content`.
3. Click **Save**.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.
- Members can flag private messages from within the community on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from communities they are members of.

  Note: Private messages can't be flagged in partner or customer portals, your internal organization, or from Salesforce1.

- Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your users to flag content.

If your community uses a Community Builder-based template you won't see the **Flagged Files** node in Community Management even if `Allow members to flag content` is enabled. To show the **Flagged Files** node, select `Show all settings in Community Management` from the **Preferences** page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable users in your community to flag items:

- "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

SEE ALSO:

Communities Moderation Overview
Assign a Community Moderator
Moderate Posts and Comments in Your Community
Moderate Files in Your Community
Moderate Private Messages in Your Community

Create Moderation Criteria for Your Community

Create criteria that defines offensive language or inappropriate content that you don't want in your community. Criteria are used in rules to moderate user-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your organization can have up to 30 keyword list criteria. This limit is per organization, not per community.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes `BadWord`, it's matched when a user types `BADWORD` or `badword`.

Set up criteria to use in your moderation rules:

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Criteria**.
3. Click **New**.
4. Enter a name, unique name, and description for your criteria.
5. Click **Save**.
6. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can be up to 100 characters and can include letters, numbers, spaces, and special characters.
   - Wildcard characters aren't supported.
   - Separate keywords with commas or line breaks.
   - When adding keywords, you can copy and paste up to 32,000 characters at a time.

   Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

   `bad-word`

   `b@dword`

   `b a d w o r d`

   To delete keywords, select the keywords you want to remove, then click **Delete**.

   A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view, create, edit, and delete criteria:

- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

To delete criteria, click **Del** from the **Criteria** page. If criteria is being used by a rule, you can't delete it.

SEE ALSO:

Communities Moderation Overview

Create Moderation Rules for Your Community

Create Moderation Rules for Your Community

Create and modify rules for your community to moderate user-generated content. Each rule specifies the user-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. You can create rules that block, flag, or replace user-generated content that contains offensive language or inappropriate content.

If your community is using the Napili template, moderation rules apply to questions created by your community members.

You can also use the Metadata API or Tooling API to set up moderation rules.

Some things to keep in mind:

- Your organization can have up to 30 rules. This limit is per organization, not per community.
- Each rule can have up to three criteria.
- Rules that block content run first, followed by rules that replace content, then rules that flag content. If two or more rules perform the same action, the oldest rule runs first.

Tip: Before creating a rule, make sure you've created criteria to use in that rule.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Rules**.
3. Click **New**.
4. Complete the following fields:
   - `Name`—Enter a name for your rule.
   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API and managed packages.
   - `Description`—Optionally, enter a description.
   - `Applies To`—Specify which types of user-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - `Criteria`—Select the criteria to enforce this rule.

     Important: If you activate a rule without specifying criteria, the rule either flags all posts and comments or prevents users from creating posts and comments entirely. Yikes! Be careful.

   - `Moderation Action`—Specify what you want to happen when the criteria is matched.
     - `Block` prevents the content from being published.
     - `Replace` publishes the content with the keywords replaced as asterisks. For example, *`BadWord`* becomes `*******`.
     - `Flag` publishes the content and then automatically flags the content as inappropriate.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view, create, edit, and delete rules:

- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

- `Message for User`—Specify the message that your user sees when their content is blocked. If you don't specify a message, the user sees the standard message: "You can't use *%BLOCKED_KEYWORD%* or other inappropriate words in this community. Review your content and try again." The *%BLOCKED_KEYWORD%* variable displays up to five blocked words. You can also use this variable in your own custom message.

  Tip: For international communities, you can translate this user message. From Setup, enter *Translate* in the Quick Find box, then select **Translate**. To provide a translation for the user message, select the Moderation Rule setup component and expand the community the rule belongs to.

- `Activate Rule`—If selected, the rule is activated.

5. Click **Save** to apply your changes.

SEE ALSO:

Communities Moderation Overview

Create Moderation Criteria for Your Community

How and when do community moderation rules execute?

How and when do community moderation rules execute?

Rules that block content run first, followed by rules that replace content, then rules that flag content. If two or more rules perform the same action, the oldest rule runs first. Community moderation rules work with existing triggers. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

SEE ALSO:

Create Moderation Rules for Your Community

Apex Developer Guide: Triggers and Order of Execution

Moderate Posts and Comments in Your Community

USER PERMISSIONS	
To view flagged items, remove flags, and delete posts or comments:	"Moderate Communities Feeds"
To view flagged content in Community Management, remove flags, and delete posts or comments:	"Moderate Communities Feeds" AND "Manage Communities" OR "Create and Set Up Communities" AND

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

	Is a member of the community whose Community Management page they're trying to access.

Community moderators can review the Flagged Posts feed which contains a list of posts and comments that members of the community have flagged as inappropriate and take action. If you're a group owner or group manager, you can view flags and take action on items in your groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and decide whether to take action.

A few things to bear in mind about flagged items:

- Moderators can only view and act on items they have access to.
- Within in group in a community, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files if necessary. They can't see the Flagged Posts feed in Community Management.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Flagged Posts** to view a feed of flagged posts and comments.
3. Click **Delete** or **Remove Flags**, depending on whether you agree that the post or comment is inappropriate and should be deleted or whether the post or comment was flagged in error.
4. Click **OK**.

Alternatively, you can moderate directly within context of your community by removing flags or deleting content in the feed.

Tip: If you want to receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

SEE ALSO:

Communities Moderation Overview

Enable Users to Flag Items in Your Community

Moderate Files in Your Community

USER PERMISSIONS	
To view the file detail page, remove flags, and delete files:	"Moderate Communities Files"
To view flagged files in Community Management, remove flags, and delete files:	"Moderate Communities Files" AND "Manage Communities" OR "Create and Set Up Communities" AND

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

	Is a member of the community whose Community Management page they're trying to access.

Community moderators can review and take action on the Flagged Files list, which contains a list of files that members of the community have flagged as inappropriate. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or content that may be offensive. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

Moderators can review and delete files in any community that they have access to.

Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if `Allow members to flag content` is enabled for their communities. If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

If your community uses a Community Builder-based template you won't see the **Flagged Files** node in Community Management even if `Allow members to flag content` is enabled. To show the **Flagged Files** node, select `Show all settings in Community Management` from the **Preferences** page.

1. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Flagged Files** to view a list of flagged files.
3. From the Action column, select **Remove Flags** or **Delete** from the drop-down menu, depending on whether you agree that the file is inappropriate and should be deleted or whether the file was flagged in error.

   You can click to preview the file without leaving the page.

4. If prompted, click **OK**.

Alternatively, you can moderate directly within context of your community by removing flags or deleting content on the file detail page.

Tip: If you want to receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

To limit the size and types of files allowed in your community, go to the **Administration** > **Preferences** page.

SEE ALSO:

Communities Moderation Overview

Enable Users to Flag Items in Your Community

Moderate Private Messages in Your Community

Community moderators can review and act on a list of private Chatter messages that members of the community have flagged as inappropriate or as spam.

The Moderate Communities Chatter Messages permission allows users to moderate private messages only in communities they're a member of. This permission doesn't allow users to see the contents of the messages. To see the contents of private messages, users need the "Manage Chatter Messages" permission. This permission allows the moderator to see *all* private messages in the Salesforce org. The "Modify All Data" permission allows moderators to remove flags or delete a private message in the SOAP API.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To moderate private messages and remove a flag or delete a private message:

- "Moderate Communities Chatter Messages" OR "Manage Chatter Messages"

  AND

  "Modify All Data"

To view the contents of a flagged private message:

- "Manage Chatter Messages"

Important: Keep these limitations in mind:

- Moderators can only use the SOAP API to remove a flag or delete a flagged private message.
- Community members can't flag private messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
- Users can't flag private messages in your internal organization, in Salesforce1, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Use a preconfigured Insights report.

  This Community Management Insights report helps you track trends and stay on top of private message spamming attacks in your community. You can view who sent the message, when it was sent, and who flagged the message. Use this report as a starting point, then use the API to remove flags or delete the messages.

  For detailed information about this package, see Report on Communities with the Dashboards and Insights Package.

- Create your own report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.

- Directly query the flagged messages from the API and then delete them.

Tip: If you want to receive an email each time a private message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Moderate Communities Feeds" permissions. To set your email preferences, go to your profile page within a community, click the drop-down button (▾) in the upper-right corner and select **My Settings**, then click **Email Settings**.

SEE ALSO:

Communities Moderation Overview

SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

Tip: Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Management. For more information, see Create Moderation Rules for Your Community.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags on the Flagged Posts feed on the Community Management page, query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on either FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create triggers:
- "Modify All Data"

Example: This trigger automatically flags posts in your community that contain *BadWord*.

```
trigger autoflagBadWord on FeedItem (after insert) {
    for (FeedItem rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert(nm);
        }
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWord on FeedComment (after insert) {
    for (FeedComment rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.commentBody.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert(nm);
        }
    }
}
```

SEE ALSO:

SOAP API Developer Guide

Organize Self-Service Communities With Topics

Organize Self-Service Communities with Topics

Topics are a fantastic way to organize content in any community. Community members can add topics to posts and discussions, and structure content organically. When you set up a self-service community with the Napili template, you can use the Community Management page to quickly guide members to key navigational and featured topics.

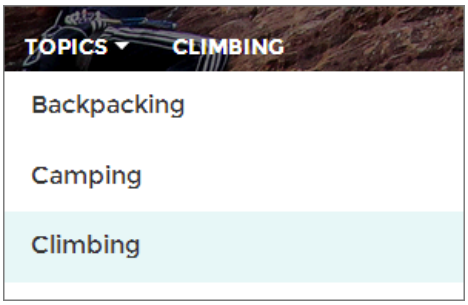
On the Community Management page, you choose navigational topics and subtopics to provide a consistent map of your community, and featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

In a self-service community, the Napili template specifies the layout and design of navigational, featured, and member-created topics. Below are visual examples of each type in an active community.

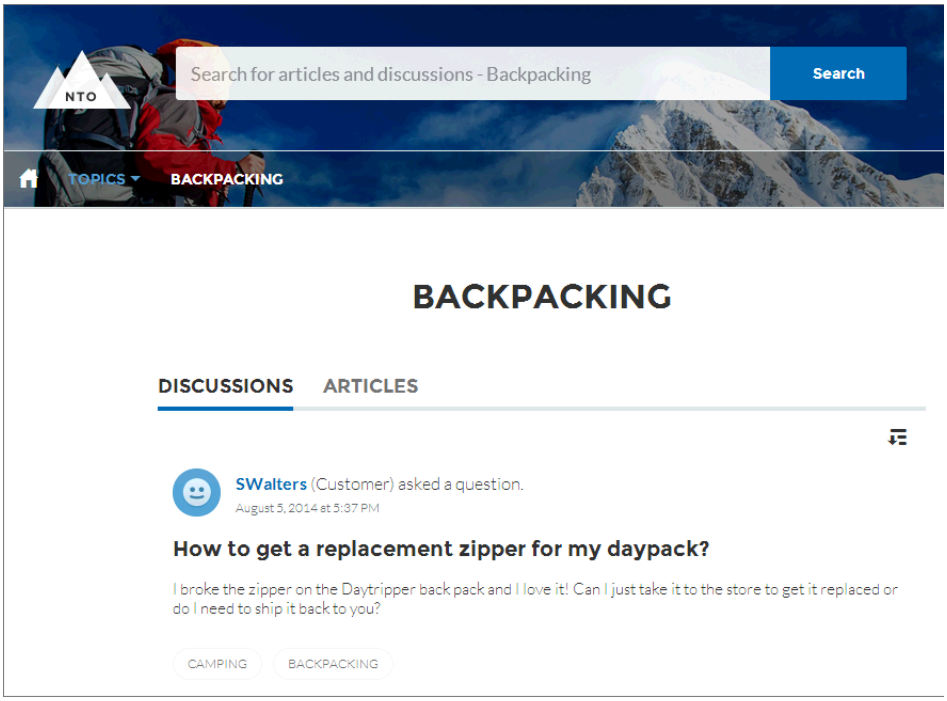
Tip: To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.

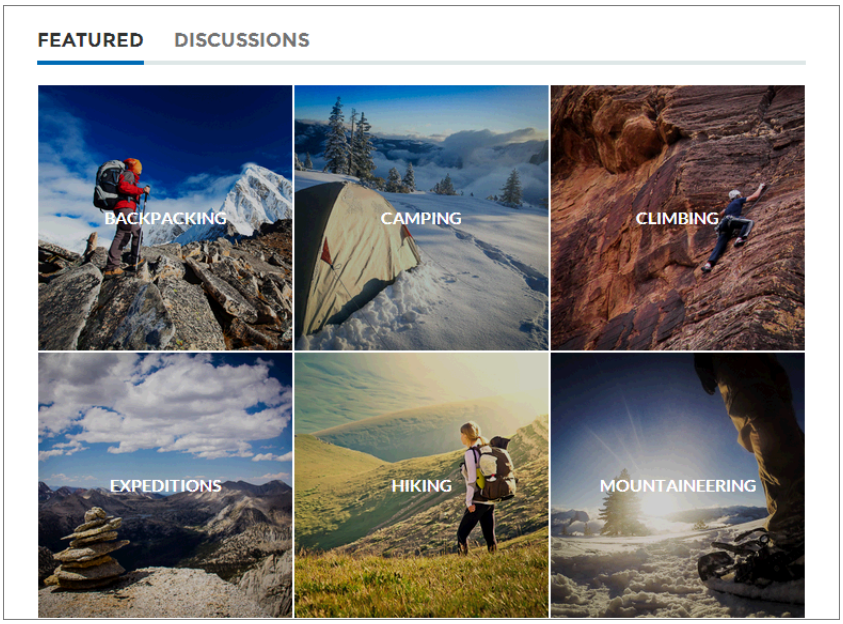


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



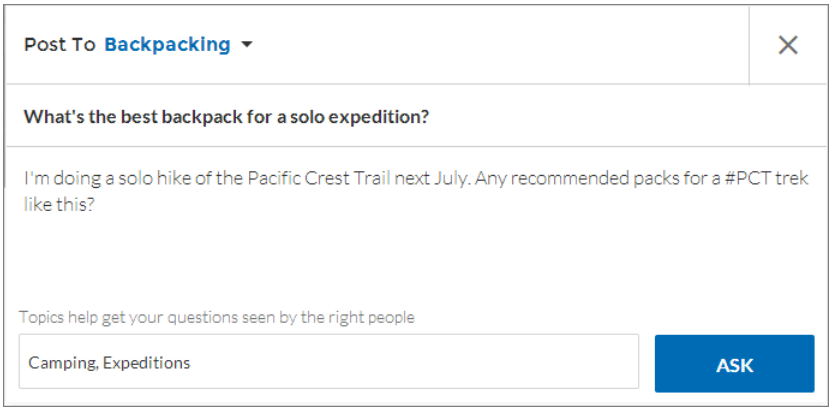
Featured topics

Featured topics are accessible from the body of your community home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Community Builder appears.)



Member-created topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box below. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search, or highlighted as featured topics on the Community Management page.

SEE ALSO:

- Set Up Navigational Topics
- Set Up Featured Topics
- Manage Topics in Communities

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

1. From Setup, enter `Topics for Objects` in the `Quick Find` box, then select **Topics for Objects**, and enable topics for all the article types you want to include.

   Note: Enabling topics disables public tags on articles. Personal tags aren't affected.

2. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

3. Click **Topics** > **Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the drop down menu (under Show the subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your organization uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

   Important: This process adds only current articles to a topic. To add new articles, return to Community Management and repeat the step above.

6. Hover over a topic name, and click . Then click **Upload banner image**, and select an image that appears across the top of the topic page.

   (Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.)

7. Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.
   The following is the maximum number of navigational topics and subtopics you can have in a Napili community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access the Community Management page:
- "Manage Communities"

  OR

  "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

To set up navigational topics:
- "Create Topics"

  AND

  "Edit Topics"

To add articles to topics:
- "View Data Categories"

  AND

  "Read" on related article types

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

- To move a topic up or down, click the arrows at left.

- To rename or remove a topic, change its banner image, or remove assigned articles, click .

SEE ALSO:

Organize Self-Service Communities with Topics

Manage Topics in Communities

See Your Community's Topics and Subtopics in One Place

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

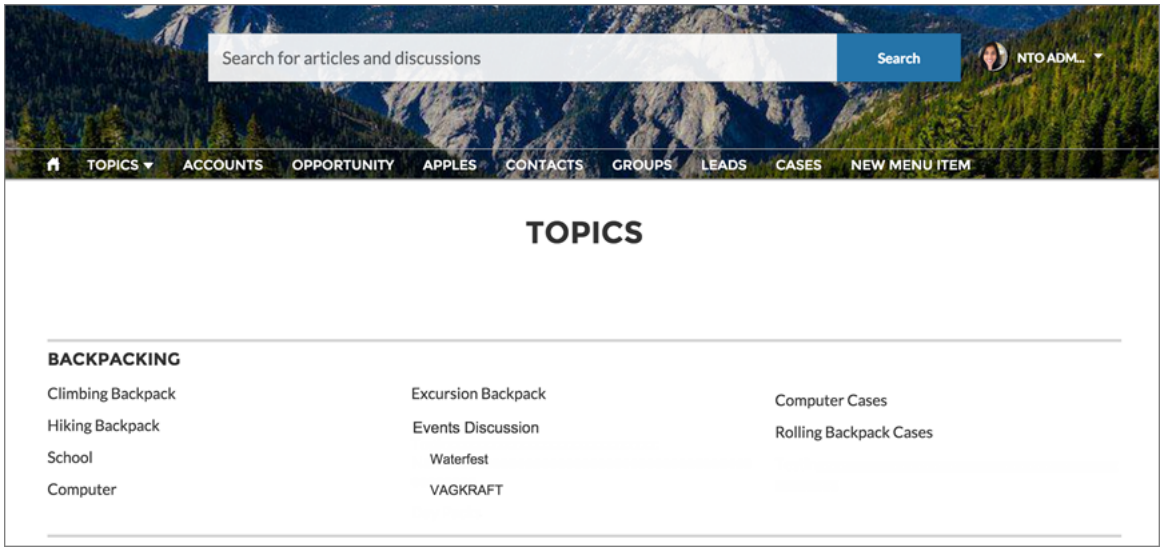
The topic catalog shows the community's hierarchy of navigational topics you have created. It is only visible once you have set up navigational topics, and it is accessed from the navigation menu.

How can the topic catalog be useful to your community members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any community user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select the **Add the "More Topics..." link** when editing the navigation menu on the home page.

Example:



SEE ALSO:

Set Up Navigational Topics

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

1. From the community, click ⚙ in the global header.
2. Click **Topics** > **Featured Topics**.
3. From the pop-up menu at right, select a navigational or member-created topic you want to feature. Then click **Add**.

   Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.

4. Hover over a topic name, and click ✎. Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.

   (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)

5. Repeat steps 3-4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

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

- To move topics up or down, click the arrows at left.
- To rename or delete topics, or change their thumbnail images, click ⚙.

SEE ALSO:

Organize Self-Service Communities with Topics

Manage Topics in Communities

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

  OR

  "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

To set up featured topics:

- "Edit Topics"

Manage Topics in Communities

USER PERMISSIONS

To access the Community Management page:	"Manage Communities" OR "Create and Set Up Communities"
To create topics:	"Create Topics"
To merge topics:	"Merge Topics"
To delete topics:	"Delete Topics"
To rename topics:	"Edit Topics"

EDITIONS

Available in: Salesforce Classic

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

As the number of topics in a community grows, curate them to improve usability. In Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. From the community, click ⚙ in the global header.

2. At left, click **Topics** > **Topic Management**.
3. Do any of the following:
   - To create a topic (often with a plan to merge existing ones into it), click **New**.
   - To combine existing topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded.
   - To rename or delete a topic, click .

     If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.

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

Note: Topics are only supported on English articles.

SEE ALSO:

Organize Self-Service Communities with Topics

Set Up Navigational Topics

Set Up Featured Topics

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

Note: Topics are only supported on English articles.

1. From the community, click in the global header.
2. Click **Topics** > **Article Management**.
3. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
4. Click an article, and then type to assign topics, or click existing ones to remove them.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access the Community Management page:
- "Manage Communities"

  OR

  "Create and Set Up Communities"

To add or remove topics:
- "Create Topics"

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Edit these recommendations in Community Management, where you can target specific audiences and use channels to specify locations for the recommendations.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

  OR

  "Create and Set Up Communities"

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Select **Recommendations** > **Recommendations**.
3. Select Default Channel or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the community.

   Default Channel

   Recommendations in the default channel appear in predefined locations, such as directly in the feed in the Salesforce1 mobile browser app and on the Home and Question Detail pages in communities using the Summer '15 or later version of the Napili template.

   Custom Channel

   You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations component to the page where you want the recommendation to appear. Use the Property Editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.
4. Click **New**.
5. Complete the following fields:
   - `Name`—Enter a name for the recommendation in Community Management. This name doesn't appear in the community.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.
   - `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.

     Tip: To create an audience that appears in this drop-down list, in Community Management select **Recommendations** > **Audiences** and click **New**.
   - `Enabled`—If checked, this recommendation is active and appears in communities.

     When disabled, recommendations that exist in feeds in the Salesforce1 mobile browser app are not removed, but no new recommendations appear. In communities using the Summer '15 or later version of the Napili template, disabled recommendations no longer appear.

6. Click **Save**.

Tip: To remove a recommendation, in Community Management, select **Recommendations** > **Recommendations**, and click the recommendation name. At the bottom of the recommendation details, click **Delete**.

SEE ALSO:

Update Your Community's Template in Community Builder

Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

  OR

  "Create and Set Up Communities"

1. Access Community Management in either of the following ways.
   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Select **Recommendations** > **Audiences**.
3. Click **New**.
4. Complete the following fields.
   - `Name`—Enter a name for the audience in Community Management.
   - `Audience Type`
     - Select **New Members** to create an audience based on how long users have been community members.

       Enter the number of days since registration for audience members.
     - Select **Custom List** to create an audience based on any criteria you want.

       Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.
5. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

Tip: To remove an audience, in Community Management, select **Recommendations** > **Audiences**, and click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All community members).

SEE ALSO:

Chatter REST API Developer Guide

Apex Developer Guide

Build Engagement With Reputation Levels

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other community members so that they know how influential you are. When you start out in the community, you are at the lowest level. As you become more active in the community, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

These are the default actions that increase your reputation level:

You increase your reputation by:

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Enable Reputation in Your Community

Set Up Reputation Levels

Set Up Reputation Points

How is my community reputation calculated?

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation, because community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Access Community Management in either of the following ways.
   - From the community, click in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.
2. Click **Administration** > **Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit Communities settings:

- "Create and Set Up Communities "

  AND

  Is a member of the community whose Community Management page they're trying to access.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	

Action	Points
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation node won't appear in Community Management. To show the Reputation node, go to **Administration** > **Preferences** and select **Show all settings in Community Management**.

SEE ALSO:

Reputation Overview

Set Up Reputation Levels

Set Up Reputation Points

How is my community reputation calculated?

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

Note: A community must have at least three reputation levels and can have up to 50.

1. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Reputation** > **Reputation Levels**.

   From here you can:

   - Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.

     Note: You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

   - Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
   - Edit the point range for a level.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update reputation levels:

- "Manage Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking **Add a level**, located underneath the list of levels.
- Remove a level by clicking ⊗ next to the level.

3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your community.

SEE ALSO:

Reputation Overview

Enable Reputation in Your Community

Set Up Reputation Points

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update reputation points:

- "Manage Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Action	Points
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.

Note: In organizations with reputation enabled prior to the Winter '15 release, actions associated with questions and answers will be available at the time of the release and their default point values will be set to 0. Existing user reputation points will not be affected by the release, and users won't accrue points from these actions until you configure point values for them.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Reputation** > **Reputation Points**.
3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to *0*.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.

Tip: You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Reputation Overview

Enable Reputation in Your Community

Set Up Reputation Levels

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

EDITIONS

Available in: Salesforce Classic

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

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5

Action	Points
Being endorsed for knowledge on a topic	20

SEE ALSO:

Reputation Overview

Enable Reputation in Your Community

One Stop Monitoring With Community Dashboards

Enable and Map Dashboards for Community Managers

Community managers can use dashboards to measure the success of their communities. To help community managers stay on top of things, you can even map a dashboard to the Community Management **Home** page. You can map custom dashboards or use ones provided in an AppExchange package. Each community can have their own dashboards.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your organization, each of the dashboard pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

Use the following steps to map or update your dashboards in Community Management:

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Dashboards** > **Settings**.
3. For each of the pages, select the dashboard you want to show to community managers.

   The dashboard you map to **Home** displays on your Community Management **Home** page.

4. Click **Save**.

   Dashboards are visible to community managers when they expand the **Dashboards** section or visit the home page in Community Management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To map dashboards in Community Management:

- "Create and Set Up Communities" OR "Manage Communities"

  AND

  "Manage Dashboards in Public Folders"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the **Home** page, check that out too.

SEE ALSO:

Create a Dashboard to Display in Community Management

View Dashboards in Community Management

Create a Dashboard to Display in Community Management

You can show any dashboard in Community Management. However, we recommend creating them based on custom report types available for communities.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Use the following process to create dashboards to display in Community Management:

1. Create custom report types based on the Networks object.

   Reports and dashboards that are based on the Networks object show community-specific information in Community Management.

   Note: You can create dashboards based on other objects and expose them in Community Management. Keep in mind that they will show data from across your organization, not just for the community in which you're viewing the dashboard.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create custom report types:
- "Manage Custom Report Types"

To create, edit, and delete reports:
- "Create and Customize Reports"

To create and share dashboards:
- "Manage Dashboards in Public Folders"

2. Use the custom report type to create a report.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.
   - Add a component for each report you want to include in your dashboard.
   - Find your report on the Data Sources tab and add it to the component.

   In order for a Salesforce Classic dashboard to optimally render in the Lightning view used in Community Management, make sure that your dashboard meets the following requirements:
   - Includes only up to 20 reports arranged within three columns
   - Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

     For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

   Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.
5. In Community Management, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Community Management, the dashboard appears under **Dashboards**. If you mapped a dashboard to the **Home** page, the dashboard appears there.

Dashboards in Community Management are not automatically refreshed. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the Dashboards tab in your internal Salesforce org and select the dashboard from the list.

SEE ALSO:

Track Community Activity

View Dashboards in Community Management

Use the dashboards in Community Management to monitor the health of your community.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Dashboards**.

   Note: Your administrator maps the dashboards. If the **Dashboards** section isn't visible, they haven't been mapped for your community.

   Pages that have dashboards mapped to them appear in the **Dashboards** section or on the **Home** page.

3. Click the dashboard page you want to view.
   The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**.

   Dashboards in Community Management are not automatically refreshed. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

4. To view a related report, click **View Report** on the dashboard.

   Remember that the dashboards are configured to display community-specific data.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the Dashboards tab in your internal Salesforce org and select the dashboard from the list.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view dashboards in Community Management:

- "Manage Communities"

  OR

  "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

SEE ALSO:

Enable and Map Dashboards for Community Managers

Insights for Community Managers

What are Insights?

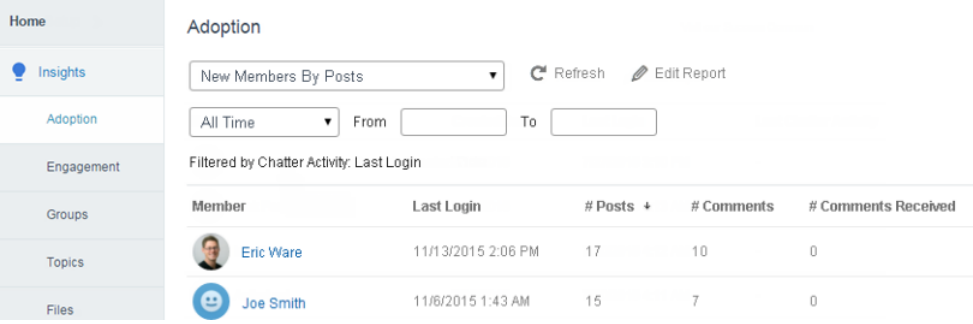
Insights are reports that help your community managers monitor activity and drill down to that activity to take further action. Insights make it easier to encourage community engagement and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups,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

EDITIONS

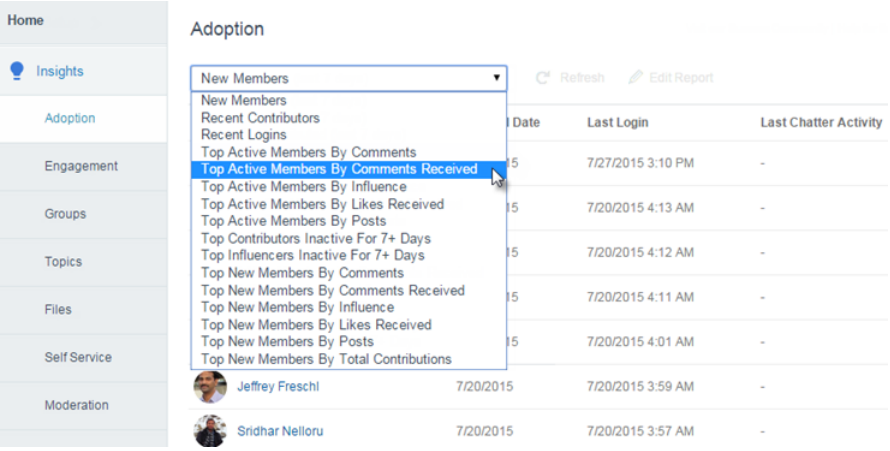
Available in: Salesforce Classic

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

Example: With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.



They can also access other reports about members directly from the Insights page using the drop-down menu.



Note: Let us do the setup work for you! Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report

columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

SEE ALSO:

Enable and Map Insights for Community Managers

Create Insights to Display in Community Management

View and Customize Insights in Community Management

Enable and Map Insights for Community Managers

Community managers can use Insights to monitor recent activity and drill down to the source of that activity to take further action. To get up and running quickly, use preconfigured Insights from an AppExchange package. You can also create and map your own. Each community can have their own Insights.

Insights pages map to report folders in your internal organization. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal organization updates the Insights page in Community Management. On the Insights page, entity links are automatically created for report fields such as `Created By` or `Group Name`.

Tip: Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter. When you install the package, report folders are automatically installed in your internal organization. If you have no previous Insights mapped, the package automatically maps them for you. You can change the default mapping at any time.

Use the following steps to map or update your Insights in Community Management:

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Insights** > **Settings**.
3. Provide a name for each Insights page and then select the report folder you want to map to the page.

   You can have up to 10 Insights pages mapped in Community Management.

   Make sure that you have shared the mapped report folder with your community managers or they won't be able to view the Insights reports.

4. Click **Save**.

   Insights pages are visible to community managers when they expand the **Insights** section of Community Management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To map Insights in Community Management:

- "Manage Communities" OR "Create and Set Up Communities"

  AND

  "Manage Reports in Public Folders"

  AND

  Is a member of the community whose Community Management page they're trying to access

Go check out your changes. Click **Insights** and then click each Insights page name. Use the drop-down menu to verify the reports mapped to each page.

SEE ALSO:

Create Insights to Display in Community Management

View and Customize Insights in Community Management

Create Insights to Display in Community Management

You can create your own Insights to display in Community Management. We recommend that you create your Insights reports based on custom report types available for communities.

Tip: Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

Use the following process to create Insights to display in Community Management:

1. Create custom report types based on the Networks object.

   Reports based on the Networks object show community-specific information in Community Management.

   Note: You can create reports based on other objects and expose them in Community Management. Just keep in mind that they will show data from across your organization, not just for the community in which you're viewing the report.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics

2. Use the custom report type to create an Insights report.

   Insights reports are just like any other report, except they must also meet the following requirements:

   - The report can only be a tabular-based report.
   - The report can't include pagination.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create custom report types:

- "Manage Custom Report Types"

To create, edit, and delete reports:

- "Create and Customize Reports"

To create and share report folders:

- "Manage Reports in Public Folders"

- We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Save the report to a new report folder that you'll use for mapping.

   We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called `Insights Members` and another called `Insights Moderation`.

   Insights pages map to report folders in your internal organization. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal organization updates the Insights page in Community Management.

4. Share your Insights report folder with your community managers.
5. In Community Management, click **Insights** > **Settings** to map Insights pages.

When a community manager accesses Community Management, the Insights reports appear in the drop-down menu on the mapped **Insights** page.

SEE ALSO:

Track Community Activity

View and Customize Insights in Community Management

Use Insights in Community Management to monitor recent activity and drill down to the source of that activity to take further action. Insights help you nurture and encourage engagement and adoption within your community.

On the Insights page, entity links are automatically created for report fields such as `Created By` or `Group Name`. This link makes it easy for you to drill down to the source of activity and take action.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Insights**.

   Note: Your administrator maps Insights pages. If the **Insights** section isn't visible, they haven't been mapped for your community.

   Pages with mapped report folders appear when you expand the **Insights** section.

3. Click the **Insights** page you want to view.
4. Filter and sort the Insights report.

   You can filter your Insights report by relative and custom date ranges. Use the drop-down date filter to select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.

   To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.

5. To access other Insights reports, click ▾ next to the report name.
6. Click **Edit Report** to customize an Insights report to fit your community needs. You can add or remove columns and update the report filters.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Insights reports in Community Management are automatically refreshed when you access them. You can also click **Refresh** to force an update.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view Insights in Community Management:

- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access

To customize Insights reports:

- "Create and Customize Reports"

SEE ALSO:

Create Insights to Display in Community Management

Enable and Map Insights for Community Managers

Reporting

Report on Communities with the Dashboards and Insights Package

The Salesforce Communities Management package gives community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management.

Use the Salesforce Communities Management package to:

- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Drill down to the source of activity and take action with Insights reports

Note: To use the preconfigured Insights reports, your community must use Chatter.

Install one of the following versions from the AppExchange:

- Salesforce Communities Management (for Communities with Chatter)
- Salesforce Communities Management (for Communities without Chatter)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To install AppExchange packages:

- "Download AppExchange Packages"

Tip: For installation instructions, detailed information about the reports, and upgrade instructions, see *Get Started with the Communities Management AppExchange Package*.

During installation, dashboard and report folders are automatically installed in your internal organization. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management, community-specific data is displayed. The dashboards and reports provided in the package are 100% customizable. Don't be afraid to customize and change what you get in the package. You won't hurt our feelings.

As newer versions of the package become available, you can upgrade your package by reinstalling it. If you customized any of the reports and dashboards, fear not; your customizations are retained during upgrade.

Navigation Node	Page Name	Description	Requires Chatter
Dashboards	Home	Stay informed about recent activity or membership. This dashboard is mapped to your Community Management home page.	
	Overview	See the overall state of your communities at a glance. 90-day trending reports show total membership, newly joined members, and member logins. If you have Chatter enabled, 90-day snapshots show post and comment metrics.	
	Activity	See metrics about posts, comments, daily unique contributors, and which types of members are contributing posts and comments.	✓

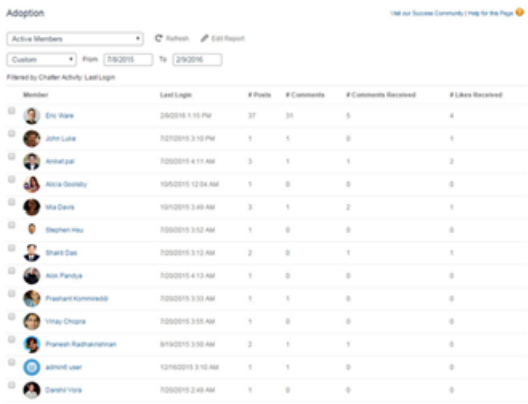
Navigation Node	Page Name	Description	Requires Chatter
	Content	Track content uploads, downloads, engagement, and content creators.	✓
	Groups	Monitor membership and post and comment activity within groups, one of the top drivers of community success.	✓
	Members	Gauge membership growth and see login metrics for the last 30 days.	
	Moderation	Track flagged content in your community.	✓
	Q & A	Review metrics about questions, answers, and best answers posted in your groups.	✓
	Self-Service	See metrics about questions, answers, and best answers posted in your user profiles. This dashboard is great for communities using the Napili template.	✓
	Topics	See metrics about the navigational and featured topics in your community.	✓
Insights	Adoption	Monitor member activity and help drive adoption in your community.	✓
	Engagement	Track posts and comments in groups and see which members are truly engaged in your community.	✓
	Files	Monitor file uploads and downloads, including files receiving a lot of comments.	✓
	Groups	Helps you identify groups with deactivated or inactive owners and also groups that have been or will be archived soon.	✓
	Moderation	Track flagged posts, files, messages, and content flagged by moderation rules in your community.	✓
	Self-Service	Track questions and answers in user profiles, including questions escalated to cases. This Insights page is great for communities using the Napili template.	✓
	Topics	Keep an eye on recent topic activity in your community.	✓

In addition to tracking Chatter usage in your community, you can track Chatter usage in your internal organization. There are specific Chatter dashboards that report *only* on your internal organization's Chatter usage. You can find these dashboards and reports under the **Chatter Dashboards** and **Chatter Reports** folders.

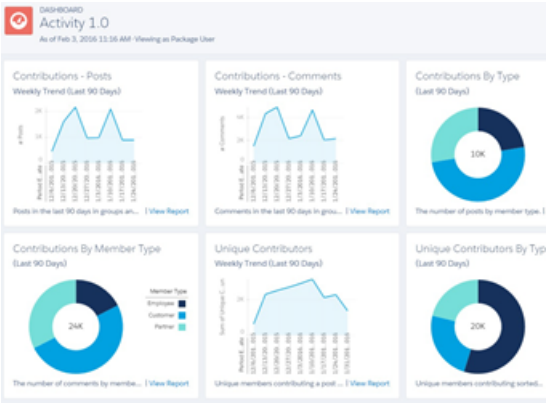
Confused about the difference between Insights and Dashboards?

Use **Insights** to view, monitor, and act on your community's activity. Insights give you a super-focused look at a specific area of your community.

Use **Dashboards** to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).



You can visit the **Insights** > **Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.



You can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.

SEE ALSO:

- Enable and Map Insights for Community Managers
- Enable and Map Dashboards for Community Managers

Set Up Report Management for External Users—Create and Edit Reports

Community partner and customer users can create and edit reports in their own personal folder or in a privately shared folder if they have sufficient permissions. You can grant partner and customer users permissions to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

Important: If your organization existed before the Summer '13 release, you must first turn on enhanced sharing for reports and dashboards before granting external users permissions. See Analytics Folder Sharing.

To create, customize, and delete reports, external users must use the Report Builder tool.

Data visibility is based on two main things: the user role the partner or customer belongs to and your organization's sharing rules. Your organization's field-level security is respected, meaning that if a field is not visible for external users, a partner or customer user won't see it in Report Builder.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create permission sets or enable custom permissions in profiles:
- "Manage Profiles and Permission Sets"

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

To share a report folder with external users:
- "Manager" folder access or "Manage Reports in Public Folders"

1. To allow external users to create and edit reports, turn on the "Create and Customize Reports," "Report Builder," and "Edit My Reports" permissions through custom profiles or permission sets. If you want external users to export report data, also assign them "Export Reports" permission.

   In Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets** or **Profiles**. Assign the following permissions:

   External User Permissions Needed to Create and Edit Reports

To create, customize, and delete reports in a personal folder:	"Create and Customize Reports" AND "Report Builder"
To create, customize and delete their own reports in a privately shared folder with Viewer access:	"Edit My Reports" AND "Report Builder"
To export report data:	"Export Reports"

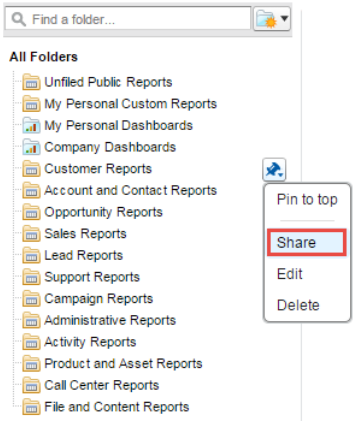
   You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner.

   Note:
   - These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
   - External users with legacy portal licenses can create and edit reports in communities, but not in portals.

2. If you want your external users to create or edit reports in a privately shared folder, grant them "Viewer" access on the folder.

   On the **Reports** tab in the Folders view, click next to the folder you want to share, then select **Share**.

   Note: Partner and customer users can't create, edit, or view reports in the Unfiled Public Reports folder.



Depending on what objects, fields, and categories your external users have access to, they might see custom report types in the UI when creating a report. Custom report types are visible if a user has read access on any fields or objects included in the custom report type.

Track Community Activity

Create custom reports to track usage, moderation, and other community activity.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

To monitor the health of your community, you can create custom report types and then create a report using that custom report type. Additionally, if you want your community managers to see your report on the Community Management page, you can create or edit a dashboard to include your report and then map the updated dashboard in Community Management by clicking, **Dashboards** > **Settings**.

EDITIONS

Available in: Salesforce Classic

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

Note: Reports and dashboards that are based on the Networks object show community-specific information on the Community Management page. This means you can create one custom report and use it across all your communities.

Use the following table to get started with reporting for communities:

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Chatter Usage	Networks > Chatter Messages	Create reports on the private message activity in your community.[1]
Chatter Usage	Networks > Groups	Create reports on the groups in your community.
Moderation	Networks > Network Audits	Create reports on all moderation activity and history in your community. To report on moderation activity in private Chatter messages, filter the report by `Audited Object Type` (on the Network Audits object) to equal `Chatter Message`.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on users in your community who either flagged items or moderated a flagged item.
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the users in your community whose items were flagged, blocked, or replaced.
Moderation	Networks > Network Moderations	Create reports on content that is currently flagged in your community.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public community page views and unique visitors.
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage in your community.
Topic Activity	Networks > Topics	Create reports on the topic activity in your community.
Topic Activity	Networks > Topic Assignments	Create reports on the topic assignments in your community.
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.
User Activity	Networks > Network Members > Login History	Create reports on the login activity in your community. To report only on external user logins, filter the report by `Status` (on the Login History object) to equal `0`.
User Activity	Networks > Network Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.
User Activity	Networks > Network Unique Contributor Daily Metrics	Create reports on the unique daily contributors in your community. A member is counted as a contributor if they posted or commented on a group or a user profile.
User Profile Photos	Networks > Network Members	To report on user profiles with or without photos, filter the report by `Has Profile Photo` (on the Network Members object) to equal `True` or `False`.

[1]To report on Chatter Messages, you must have the "Manage All Data" or "Manage Communities" permissions.

Note: You can create dashboards based on other objects and expose them in Community Management. Keep in mind that they will show data from across your organization, not just for the community in which you're viewing the dashboard.

SEE ALSO:

Report on Communities with the Dashboards and Insights Package

Educate Your Users About Communities

Share Personal Contact Information Within Communities

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

When interacting with other community members, it's important to balance being visible and accessible with protecting your personal contact information. You may not want to show your job title, phone numbers, and other contact details outside of your internal organization. Your customers and partners may not want other customers and partners viewing all their contact information.

Use either the user interface or API to control visibility. You can choose to expose fields to employees only, members of the community from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the community. Some fields allow up to three levels of visibility, while others allow fewer.

- Employees—Only members from the internal organization can view.
- External—Members from the internal organization and external members, such as customers and partners, can view. External users are users with Community, Customer Portal, or partner portal licenses.
- Public—Anyone can view, including guest users viewing publicly accessible pages that don't require login. Guest users can access public pages in communities via the Guest User license associated with each site or community.

In the API, setting a field to `true` on the User object makes it visible to the type of user indicated in the field name (external or guest users).

Consider these tips about the visibility of your contact information.

- Your chosen settings apply to every community you're a member of.
- When a user is restricted from viewing a contact information field, there are differences in what's displayed in the user interface versus the API.
  - In the user interface, the restricted field is hidden from your profile everywhere that it usually displays in a community. If your organization displays your profile information on custom Visualforce pages, the field still displays, but with the value `#N/A`.
  - In the API, a field set to `false` returns the value `#N/A`.
- Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

Default Visibility Settings for Contact Information

This table summarizes the default visibility settings for contact information and your options for restricting visibility.

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to *Your Name* > **Edit Contact Info**, then click **About**	Everyone see these fields unless your administrator enables nickname display or creates a custom page that displays this	N/A

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
			information. If your administrator has enabled nickname display, your nickname displays in place of your first and last names in most locations.	

Title	External	Go to *Your Name* > **Edit Contact Info**, then click **About**	Employees, external, or public	`UserPreferencesShowTitleToExternalUsers`
				`UserPreferencesShowTitleToGuestUsers`
				Note: When the guest user preference is set to `true`, the job title field is visible to external members even if the external member preference is set to `false`.

Profile photo	External. Users without access see the stock photo.	On your profile page, click **Update** under your photo (or **Add Photo** if you haven't added a photo yet), then select `Show in communities with publicly accessible pages`	External or public	`UserPreferencesShowProfilePicToGuestUsers`

City
Country
Email
Fax
Mobile Phone
State
Street Address
Work Phone
Zip/Postal Code
	Employees	Go to *Your Name* > **Edit Contact Info**, then click **Contact**	Employees, external, or public	Note: For each pair of preferences controlling the visibility of a field, when the guest user preference is set to `true`, the field is visible to external members even if the external member preference is set to `false`.
				`UserPreferencesShowCityToExternalUsers`
				`UserPreferencesShowCityToGuestUsers`
				`UserPreferencesShowCountryToExternalUsers`
				`UserPreferencesShowCountryToGuestUsers`
				`UserPreferencesShowEmailToExternalUsers`
				`UserPreferencesShowEmailToGuestUsers`
				`UserPreferencesShowFaxToExternalUsers`
				`UserPreferencesShowFaxToGuestUsers`

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
				`UserPreferencesShowManagerToExternalUsers`
				`UserPreferencesShowManagerToGuestUsers`
				`UserPreferencesShowMobilePhoneToExternalUsers`
				`UserPreferencesShowMobilePhoneToGuestUsers`
				`UserPreferencesShowPostalCodeToExternalUsers`
				`UserPreferencesShowPostalCodeToGuestUsers`
				`UserPreferencesShowStateToExternalUsers`
				`UserPreferencesShowStateToGuestUsers`
				`UserPreferencesShowStreetAddressToExternalUsers`
				`UserPreferencesShowStreetAddressToGuestUsers`
				`UserPreferencesShowWorkPhoneToExternalUsers`
				`UserPreferencesShowWorkPhoneToGuestUsers`

Navigate to Your Communities

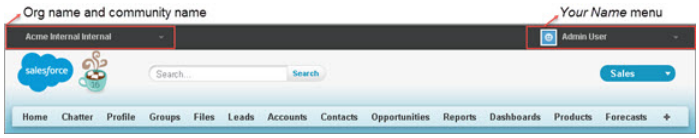
You can easily switch between working in your internal organization and collaborating with customers or partners in communities. The global header is not available by default, the administrator for your organization must enable it for community members.

Note: Organizations who enabled Communities before Winter '14 see the new global header by default when they turn on Communities.

EDITIONS

Available in: Salesforce Classic

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



The menu on the left side lets you switch between communities and your internal organization.

- To access communities from within your organization, click ▼ next to *`Organization Name`* in the drop-down and select the community you want to switch to. The drop-down shows `Active` communities that you're a member of. If you have the "Create and Set Up Communities" permission, you also see `Preview` communities that you're a member of.
- To return to your internal organization, click ▼ next to *`Community Name`* in the drop-down and select your organization name.

Internal users who aren't members of any community only see the company name. External users see the drop-down menu only if they belong to more than one active community.

Note: If an external user who is only a member of one `Active` community is given the URL for a `Preview` community, they don't see the drop-down menu in the `Preview` community.

You can work in more than one community at a time if you open each one in a different browser tab.

Switching between your internal organization and your communities doesn't have to disrupt your workflow. We automatically return you to the page where you were last working, so you can pick up right where you left off.

Note: If your organization is setting up My Domain but hasn't finished deployment of the new custom domain, switching from a community to your internal organization directs you to the Salesforce login page instead. This can happen when you've logged in using a My Domain URL that has been registered but not yet deployed. Once your domain is deployed, selecting your organization in the drop-down directs you to the internal organization as expected.

The `Your Name` menu on the right side contains links to edit contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features. If your organization is using Lightning Experience, users with the appropriate permission can switch between Salesforce Classic and the new interface using the Switcher. Look for the `Switch to Lightning Experience` link in the `Your Name` menu. Communities aren't supported in Lightning Experience, so to create, manage, or access communities from the global header, you'll have to switch back to Salesforce Classic.

SEE ALSO:

Salesforce Communities Overview

Search Behavior in Communities

In general, searches within a community return results specific to that community. Search behavior also depends on whether Chatter is enabled in your organization.

If Chatter is enabled in your organization, global search and contextual feed search are enabled by default in all communities.

- With global search, users can search for records, files, people, groups, topics, and feed posts and comments.
- Feed search ( ) is helpful when users want to look for information in a specific feed context, such as in groups, on a user's profile, in a record feed, or in the community feed.

EDITIONS

Available in: Salesforce Classic

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

If Chatter isn't enabled, sidebar search is enabled in all communities.

- Sidebar search doesn't support searches for items specific to Chatter, such as feeds, groups, files, topics, and user profiles.

Search behavior in communities is different from searches in the internal organization:

- In general, searches within a community return matches from within the community. To find items from a different community, users must leave the current community and search from within the other community.
- In search results in a community, users can see what they have access to through their profiles or permission sets in addition to what is explicitly shared with them in the community. This may include internal company content and records not explicitly shared in the community. For example, if the user's profile allows access to account information, and the accounts tab isn't made visible in the community, the user is able to access account information from their search results.
- For user searches performed by external community members, global search and enhanced lookup search (with the **All Fields** option selected) query the following limited set of fields:
  - Name
  - Username
  - User ID
  - Body
  - Email
  - Phone

  - Custom fields

  For example, if an external community member searches for a user, John Doe, by his alias, `jdoe`, and that term isn't contained in any of the searchable fields, the user John Doe isn't included in search results.
- Search results for records and files are not limited to data made visible within the community. Record search results include all the records a user has access to across all communities, including the internal organization's records if they have access. In file searches, users can see:
  - Files they own
  - Files shared with them directly
  - Files they have access to in a library
  - Files that are posted to a record they have access to
  - Files that are posted to groups or shared with that community
- To enable search result filters for an object in a community, the administrator must enable them for that object from within the internal organization.

Manage Your Community Email Notifications

Use email notifications to keep up with important updates in communities.

EDITIONS

Available in: Salesforce Classic

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

You can choose to receive email notifications whenever someone posts on your profile, comments after you on a post you've commented on, posts to a group you belong to, and more. Email notification preferences are set by community.

To set your email preferences, go to your profile page within a community, click the drop-down button (▾) in the upper-right corner and select **My Settings**, then click **Email Settings**. You can turn individual notifications on or off.

Your chosen settings apply to the current community. If you don't belong to any groups yet, you won't see the option to set groups on this page until after you join your first group. You can also set your group email preferences using the **Email Me...** drop-down on each group's page. You can choose to receive a daily or weekly digest email or an email every time someone posts. This option is visible if you're a group member.

Your email options are similar to the Chatter email settings in your internal organization under your personal settings (*Your Name* > **My Settings** > **Email Settings** for Chatter Free users). Within communities, however, note the following differences.

- The default notification frequency for new groups you join can't be set via the user interface. It can be set only via Salesforce APIs (SOAP API and REST API).
- Personal digests aren't currently available.
- If your community has Chatter messages enabled, you're notified of file shares in a private message. If Chatter messages aren't enabled, you'll continue to be notified of file shares by email.
- If flagging is enabled in the community, the `Flags an item as inappropriate` option appears for all members of the community, but only sends notifications if:
  - You're a group owner or manager and a member flags a post, comment, or file in your group.
  - You're a moderator and a member flags a post, comment, or file you have access to. Depending on the type of notification you want to receive, you also need following permissions:

Email Notifications About	Required Permission
Flagged posts and comments	"Moderate Communities Feeds"

Email Notifications About	Required Permission
Flagged files	"Moderate Communities Files"
Flagged private Chatter messages	"Moderate Communities Feeds" and "Moderate Communities Chatter Messages"

If the **Flag as Inappropriate** link doesn't work in your email, try flagging the message from the UI.

Who Can See What in Communities

Communities contain various types of users who require varying levels of access. What users see depends on their user type and which tabs the administrator selects when creating the community. The behavior outlined below also doesn't take into account updates to your sharing model or user sharing.

EDITIONS

Available in: Salesforce Classic

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

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Administer communities in Salesforce	Can create, customize tabs and branding, add or remove members, and activate or deactivate a community. User must also have the "Customize Application" permission to create or customize communities.	Not available	Not available
Global Header	The drop-down in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can access setup for all communities regardless of status. Can see communities in `Preview` status.	The drop-down in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can't access communities in `Inactive` status. Can see communities	The drop-down in the global header shows a list of communities the user has access to. Can't access communities in `Inactive` status. Can see communities in `Preview` status if a link is provided.

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
		in `Preview` status if a link is provided.	
`Your Name` menu in Global Header	Same as in internal organization.	Same as in internal organization. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal organization and all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
`Community Management` menu in Global Header	Admins or users with "Manage Communities" can see the menu and use it to preview the community or access community settings in Community Builder, Site.com Studio, and Force.com. Note that the Community Builder option doesn't appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	Users with "Manage Communities" can see the menu and use it to preview the community or access Community Builder, Site.com Studio, and Force.com.Note that the Community Builder option doesn't appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	Not available
Salesforce Online Help	Can see Salesforce Online Help.	Standard Salesforce user sees Salesforce Online Help. Chatter Free user sees Chatter help.	Not available
People	Can see everyone else in the community and vice versa.		
Profiles and people hovers	Can see all contact information fields (such as Title, Work Phone, and Email) on all community members' profiles. In people hovers,		Can see all members' First Name, Last Name, and Nickname fields

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
	user always sees members' Title, Work Phone, and Mobile Phone fields.		and profile photos, but can only see additional contact information fields that members have chosen to show to external users. By default, Title is shown while all other fields are not. In people hovers, user sees Title, Work Phone, and Mobile Phone fields only if the member has chosen to show them.
Records (such as accounts, leads, opportunities)	Can see records they have access to (based on sharing rules) across all communities and their internal organization.	Standard Salesforce user sees records they have access to (based on sharing rules) across all communities and their internal organization. Chatter Free user doesn't have access to records.	Can see records they have access to (based on sharing rules and permissions) across all communities.
Dashboards and Reports	Can view and create dashboards and reports		Role-based external users can create and edit reports and dashboards in communities, but not in portals. However, there are some exceptions. For more information, see Set Up Report Management for External Users—Create and Edit Reports. All role based external users can refresh dashboards.
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Chatter Visibility

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Groups	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post. Administrators can also control whether users in the organization and external users can create new groups through the "Create and Own New Chatter Groups" user permission.	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.	Within a community, user can see all groups in the community and join them, but can't see groups from other communities they're a member of. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.
Files	Regardless of the current community, users see Chatter files they own, that are shared with them directly, that they have access to in a library, or that are posted to a record they have access to. Files posted to groups and shared with an entire community can only be viewed in that community.		Regardless of the current community, users see files they own, that are shared with them directly, or that they have access to in a library. Portal users see files posted to records they have access to, unless the record post was marked "Internal Only".
Profiles	Can see profiles for all members in the current community.		Can see profiles for all members in the current community. Cannot see profiles of users in the internal organization. Profile visibility enforces user sharing.
Recommendations	User gets people, group, file, and record recommendations for the current community only.		
Activity and Influence	Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is counted in the user's internal organization and not in the community where the activity occurred.		Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is not

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
			counted in the user's activity statistics and influence.
Email Notifications	Email notification preferences are set by community. Within a community, users can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) Within a community, all users can control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.	Email notification preferences are set by community. Within a community, standard Salesforce user can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) Chatter Free user can control Chatter emails for their communities under `Your Name` > **My Settings** > **Email Settings**. The chosen settings apply to the current community. Within a community, all users can control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.	Email notification preferences are set by community. Within a community, external users can control their Chatter email notifications under `Your Name` > **My Settings** > **Email Settings**. Portal users can also control group email notifications on each group's page. Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.
Topics	Can see hashtag topics and Chatter topics, including topics in feeds, the topics list, topic detail pages, Trending Topics, and Recently Talked About topics for the current community only.		
Favorites	Can add search, topic, and list view favorites in the current community.		Can add only topic favorites in the current community.

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Chatter Messages	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Administrators with "Manage Chatter Messages" and "API Enabled" permissions can delete messages. The API allows users to send Chatter messages across communities.	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of.	In the user's list of Chatter messages, can see all messages they have sent or received in any community they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Chatter messages are accessed through the Chatter tab, which may be disabled for external community members. Administrators should ensure that the Chatter tab is enabled if using Chatter messages in communities.
Messenger (Chat)	Messenger is not available with Communities.		

Feeds Visibility

The following table shows what each kind of user can do or see in Chatter Feeds within a community.

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Post on a record	Can post on any records within the community.	Can post on any records within the community to which the user has access.	Can post on any records within the community to which the user has access.
Bookmark a post	Can bookmark posts within the current community. The Bookmarked feed only contains posts from the current community.		
Mention someone	Can mention people specific to the current community. User can't mention an external user on an internal post.		Can mention people specific to the current community.
Share a post (repost)	Can share a post only in the current community.		

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Add topics to a post	Can add hashtag topics and Chatter topics to any posts within the current community. Topics are specific to the current community and can't be accessed from another community.		

Search Visibility

Search behavior in communities varies slightly from the search in the internal organization. Search results respect sharing rules for all items by default. The following table describes what each type of user in a community can see in search results.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
People Users	People specific to the current community. • Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization. • Portal users can't search for users in the community when sidebar search is enabled. • When external community members search for users, global search and enhanced user lookups (with the **All Fields** option selected) query the following limited set of fields on user records: – Name – Username – User ID – Body – Email – Phone – Custom fields		
Groups	Groups specific to the current community.		
Files	Visibility in the current community: • Owned files • Files shared with the user in a public or private group • Files shared with the entire community Visibility in any community: • Files posted on accessible records and record feeds		Visibility in the current community: • Owned files • Files shared with the user in a public or private group • Files shared with the entire community

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
	• Salesforce CRM Content library files that the user has access to Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.		Visibility in any community: • Files posted on accessible records and record feeds (unless the file posted on the record is marked "Internal Only") • Salesforce CRM Content library files that the user has access to Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.
Topics	Topics specific to the current community.		
Feeds	Feed posts and comments from within the community where the search is performed. Global search returns information from all feed contexts. Contextual feed search ( ) returns information from within the context where the search is performed, such as from the feed on a user's profile, a record, or a group. To find information in a different community feed, users must search from within that community.		
Search Auto-Complete	Recently accessed items specific to the current community.		
Records (accounts, contacts, leads, and so on)	Full visibility for all items across all communities and in the internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and in the internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.
User lookups on records	All users across all communities and in the internal organization.		Users who are members of all communities that the user is also a member of, and other external users associated with the same external account. Users with partner portal licenses also see the owner of the portal account. The Recently Viewed Users list in the lookup shows all users that they have access to via

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
			their license, profile settings, permission sets, and sharing rules. If user sharing is enabled in your organization, this behavior varies depending on how it's configured. For external community members, enhanced user lookups search within a limited set of fields when the **All Fields** option is selected.
Lookup searches on records	Full visibility for all items across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.
Lookup searches in Community Management	Lookups in Community Management initially return the items you most recently viewed from within the community. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.	No	No
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

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