

Set Up and Manage Salesforce Communities

Salesforce, Winter '17





CONTENTS

SET UP AND MANAGE SALESFORCE COMMUNITIES
Salesforce Communities
Set Up and Maintain Your Community
Community Security and Authentication
Design and Page Management
Community Templates
Customize Templates with Community Builder
Community Management
Community Reporting
Educate Your Users About Communities
INDEX

SET UP AND MANAGE SALESFORCE COMMUNITIES

Salesforce Communities

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. Here are a few resources to get you started with setting up your own community.

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



Learn About Communities

Before you begin creating a community, we recommend going over a few key concepts on Trailhead

- Community Basics
- Community Rollout Strategy

Create, Design, and Manage Your Community

- Getting Started with Salesforce Communities (PDF)
- Use Templates to Build Communities (PDF)
- Which Community Template Should I Use?
- Manage Your Community (PDF)
- Migrating from Portals to Communities (PDF)
- Report on Communities with the Dashboards and Insights Package
- SEO Best Practices

Limitations, Supported Browsers, Mobility

- Communities Limits
- Supported Browsers for Communities
- Access Communities in Salesforce1

Advanced Community Customization

- Lightning Components in Community Builder
- Lightning Component Developer's Guide
- Visualforce Developer's Guide
- Visualforce Component Reference

AppExchange Packages to Use with Communities

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

Stuck? Ask for Help in a Success Community

- Community Cloud
- Community Implementation
- Community Management

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.

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

Communities can be based on standard Salesforce functionality and tabs, or on 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 org and can be easily accessed from the global header using the drop-down menu in the top left corner of Salesforce or in the Salesforce 1 Mobile Browser App. Use this menu to switch between your communities and your internal Salesforce org.

SEE ALSO:

Plan Your Implementation
Enable Salesforce Communities
Create Communities
Manage Your Community

Plan Your Implementation

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

- Determine the business requirements of the community. What types of users are you creating the community for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or marketing.
- Estimate the size of the community. This will help determine your licensing requirements.
- Decide if you want your community content to be publicly available to guest users without licenses
- Plan the look-and-feel of your community and then evaluate the available customization options. With Communities, you have the following choices:
 - 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.

Supported Browsers for Communities

Communities browser support varies by the device on which you access the community and the community template.

Salesforce Tabs + Visualforce

Communities that use the Salesforce Tabs + Visualforce template are supported on desktop devices on all the browsers supported by Salesforce. These communities are also accessible from Salesforce1 apps.

EDITIONS

Available in: Salesforce Classic

Koa, Kokua, and Customer Service (Napili)

Communities that use the Koa, Kokua, and Customer Service (Napili) templates are supported in the following browsers.

On Desktop Computers

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

On Mobile Devices

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

Access Communities in Salesforce1

Accessing communities from the Salesforce1 mobile app depends on several factors, including the type of template used to create the community and the licenses and permissions of community members.

Grant the Necessary Permissions

Make sure that community members can access Salesforce1:

- Verify that Salesforce1 is enabled for your org (default) or enable it. From Setup, enter Salesforce1 in the Quick Find box, then select Salesforce1 Settings.
- Set up access to the Salesforce1 mobile browser app for external users in your community. On each external user record, select
 Salesforce1 User. (When the mobile browser app is enabled for your internal org, only internal users are automatically assigned the Salesforce1 User setting.)

Without this setting, community members must append /one/one.app to the community URL (for example, https://universaltelco.force.com/customer/one/one.app) to access the community via Salesforce1 from a supported mobile browser.

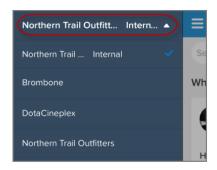
EDITIONS

Available in: Salesforce Classic

• Allow community access via the Salesforce1 downloadable apps by granting the "API Enabled" profile permission to external users with communities licenses.

Communities Using the Salesforce Tabs + Visualforce Template

Communities that use the Salesforce Tabs + Visualforce template are supported in all the Salesforce1 apps. Internal users use the switcher at the top of the Salesforce1 navigation menu to access their communities. External users see this menu when they belong to multiple communities and can use it to switch between communities. This switcher automatically populates with the communities the user has access to, so no additional setup is required.



Type of User	Salesforce1 Mobile Browser App	Salesforce1 Downloadable App for iOS Devices	Salesforce1 Downloadable App for Android Devices
Users with standard Salesforce licenses Internal org users who are also in a community	Log in to Salesforce from a supported mobile browser. Then use the switcher at the top of the Salesforce1 navigation menu and select a community.	Log in to the app. Use the switcher at the top of the Salesforce1 navigation menu and select a community.	Log in to the app. Use the switcher at the top of the Salesforce1 navigation menu and select a community.
External users with the following community licenses: Customer Community Customer Community Plus Partner Community Customer Portal Partner Portal High-Volume Portal User	Navigate to the community URL and log in with the community credentials. If the community URL doesn't contain one / one . app, append it to the URL.	On the Salesforce1 login screen, tap	On the Salesforce1 login screen, tap . Add the community as a new connection, using the community URL for the host name: (<domainname>.force.com/<path-prefix>). Then, select the community connection and log in with the community credentials.</path-prefix></domainname>
Unlicensed users (also known as guest users)	Navigate to the community URL. Guest users can only access public community content that doesn't require them to log in.	Not supported	Not supported

Communities Using the Koa, Kokua, and Customer Service (Napili) Templates

Because their styling doesn't display well in Salesforce1, we don't load communities built on the Koa, Kokua, or Customer Service (Napili) templates in the Salesforce1 apps. These communities are responsive and it's best to access them directly from a supported mobile browser using the community URL.

Community Management and Community Builder

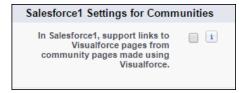
The Community Management page isn't available in Salesforce1. We recommend that you use the supported browsers on desktop computers to make customizations in Community Management and Community Builder.

Salesforce1 Settings for Communities

Easily link to Visualforce pages from other Visualforce pages in Salesforce1 by selecting the checkbox under **Salesforce1 Settings for Communities** in Communities Settings.



Example:





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

EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit Communities settings:

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.

Ø

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.

- 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 Ouick 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.

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:



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.

These settings apply if your community is set up with Partner Community or Customer Community Plus user licenses. The limit is three roles; the system default is one.

For example, if three partner roles are currently created when an account is enabled for your community—Executive, Manager, and User—but you need only the User role for new accounts, you can reduce the number to one role. 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:

- 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.

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:

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

SEE ALSO:

Create Communities Users

Enable Super User Access in Communities

When you enable super user access, partner users in communities can access more 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 18.

Granting super user access to external users in your community lets them access more data and records, regardless of sharing rules and organization-wide defaults. Super users 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. 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 automatically get super user access again.

SEE ALSO:

Create Communities Users

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:

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.

- 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

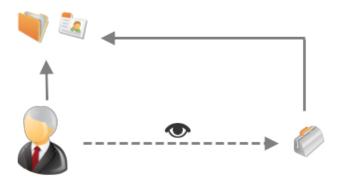
Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

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:

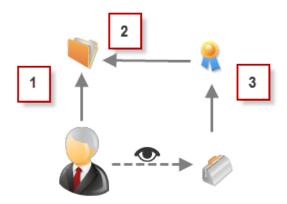
- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

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 orgs that have thousands to millions of communities users.

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

Characteristics

High-volume community users:

EDITIONS

Available in: Salesforce Classic

- 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.

Admins 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.
- **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**.

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:

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.
- **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

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:

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

To log in as an external user:

role.

"Manage Users"

AND

"Edit" on Accounts



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 $\mbox{Delegated External User Administrator}$ 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 more 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. 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.

1. To start creating communities, from Setup, enter *Communities* in the Quick Find box, select **All Communities**, then click **New Community**.

The Community Creation wizard appears, with different out-of-the-box template options for you to choose from. If you have set up custom templates in your org, you see them in the wizard as well.

2. To see more information about a template, select it.

Kokua

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

Koa

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

Customer Service (Napili)

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

Aloha

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

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Allows full platform access with an extremely flexible configuration. Requires developer experience and advanced setup skills. Supports most standard objects, custom objects, and Salesforce 1. Keep in mind that the Salesforce Tabs + Visualforce template doesn't work with Community Builder.

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

Data Category Group Name

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.

6. Enter a community name.

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: 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.

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

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



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

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

8. Click Create.

The community is created in Preview status.

9. On the confirmation page, click **Build & Customize** to customize and build your community with Community Builder. Or click Manage & Moderate to go to Community Management to set topics, install community dashboards, or configure your community's settings.

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.



[1] Important: After 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 to the community, you can remove the profile and give yourself access through a different profile or permission set.

SEE ALSO:

Salesforce Communities Overview

Customize Communities

How many communities can my organization have?

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 many communities can my organization have?

You can have up to 50 communities in your Salesforce org. Active, inactive, and preview communities, including Force.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.

SEE ALSO:

Create Communities

EDITIONS

Available in: Salesforce Classic

Create Your Community with 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.

 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 out-of-the-box template options for you to choose from. If you have set up custom templates in your org, you see them in the wizard as well.

2. To see more information about a template, select it.

Customer Service (Napili)

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

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Allows full platform access with an extremely flexible configuration. Requires developer experience and advanced setup skills. Supports most standard objects, custom objects, and Salesforce 1. Keep in mind that the Salesforce Tabs + Visualforce template doesn't work with Community Builder.

Kokua

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

Koa

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

Aloha

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

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

Data Category Group Name

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

Top Level Category

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

Company Name

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

6. Enter the name and optional URL for 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" 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.

The community is created in preview status.

- **8.** On the confirmation page, click **Build & Customize** to customize and build your community with Community Builder. Or click **Manage & Moderate** to go to Community Management to set topics, install community dashboards, or configure your community's settings.
- Important: After 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 to the community, 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

Manage Your Community's Pages in Community Builder

Customize Communities

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All
 Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 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 don't see the Topics section. Some of the options in the following list might not appear in your community. To display all sections, go to AdministrationPreferences and enable Show all settings in Community Management.
 - Members
 - Tabs
 - Branding
 - Login & Registration
 - Emails
 - Pages
 - Preferences
 - Settings
- **3.** To share the community with stakeholders while it's still in Preview status, copy the URL displayed on the **AdministrationSettings** 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access Community Management:

- "Access Community Management" OR "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 access moderation rules and 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 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

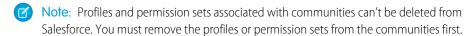
Add Members to Your Community

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.



- 1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community**Management.

2. Click AdministrationMembers.

- **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.

- (1) Important: If you're an administrator and accidentally remove yourself from a community, you can't 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**.

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. b. Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.

c. Click Add.

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

5. Click Save.

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

- 1 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 27.

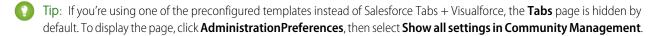
Before you begin, keep these things in mind:

- 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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community** Management.

2. Click AdministrationTabs.



- 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 members don't have access to the community landing tab, they see the first tab they have access to from the selected community tabs. If they don't have access to any of the tabs, they see the Home tab.

6. Click Save.

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

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

SEE ALSO:

Customize Communities
Rename the Chatter Tab

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.

- 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"
 - "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 one of the following ways.
 - From the community:
 - − In Salesforce Tabs + Visualforce communities, click 💮 in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All
 Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationBranding.

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

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. 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.

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationEmails.

- 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.

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.

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.
 - 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.
 - (1) 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.
- Options SendWelcomeEmail—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:
	 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 <code>\$Network</code> global merge field type and its properties, as described in this table.

Field Name	Description The name of the community, as entered during community creation.		
\$Network.Name			
\$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}</any_object>	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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationPreferences.

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

4. Click Save

SEE ALSO:

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

Show Nicknames Instead of Full Names in the Community

Enabling nickname display in your community allows more privacy and protects member identities. This 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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationPreferences.

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, Salesforce 1, and any community sites activated using community templates the

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.

SEE ALSO:

Customize Communities Preferences

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

Enable Public Access to a Community

Enable access to communities for guest (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. A community with public discussions, known issues, and solutions posted by other community members or customer support allows existing and potential customers to view information without making costly support calls.

Public access to any community depends on the level of access you grant the guest user profile, enabling access to Chatter content via the API, and can also be controlled per page in Community Builder.

Guest User Profiles

Whenever you make a community using the Community Creation wizard, Salesforce automatically creates a guest user profile for the community. To view or modify the guest user profile permissions, access the guest user profile in one of the following ways, and change its settings to open up or limit access to your community.

- In Salesforce Tabs + Visualforce communities, access Community Management. From the drop-down list, select **Go to Force.com**.
- In Community Builder-based templates, access Community Builder. Select the guest user profile name from Settings > General.
 - If you have enabled profile-based rollout for Chatter in your organization, guest users can't
 access public communities until you enable Chatter access on the guest user profile. For
 more information, see Control Chatter Access through User Profiles in the Salesforce Help.
 - Also, page variations and page-level settings gate access to your community pages.

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.

Enabling Public Access to Chatter Via the API

The following Lightning and Visualforce pages and components in communities need access to underlying Chatter capabilities to load correctly for guest users.

- Case Feed
- Featured Topics & Feeds
- Feed
- Group
- Group Detail
- Headline
- Recommendations
- Record Information Tabs
- Related Lists
- Reputation
- Search & Post Publisher

To enable access to Chatter functionality, in Community Management:

- 1. Click AdministrationPreferences.
- 2. Select Give access to public API requests on Chatter, then click Save.

Enabling public access via the guest user profile and the public API *also* allows you to expose groups, topics, user profiles, and feeds for guest users via Chatter in Apex. This is particularly helpful when you're building your own community pages from scratch.

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click AdministrationPreferences.
- 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

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.

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.

- From Setup, enter All Communities in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community.
- From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Select **AdministrationPreferences**, 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.

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

Users with this permission set see the global header at the top of all pages. They can use the menu on the left to switch between their internal 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.



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

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"

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community**Management.

2. Click AdministrationSettings.

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.

SEE ALSO:

Customize Communities
Communities Statuses

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"

Activate Your Community

Activate your community to make it accessible to community members. The effect of activating a community differs by template.

- Salesforce Tabs + Visualforce: Activating the community makes the community URL active
 and enables login access for community members. If welcome emails are enabled when you
 activate, a welcome email is sent to all members. If any of those users are new portal users, their
 welcome email includes their username and password.
- Koa, Kokua, or Customer Service (Napili): Activating the community sends out a welcome
 email to all community members and registers the site with Brombone[™], a search engine
 optimization service. To make the community URL active and enable login access for community
 members, publish the community.
- 1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All
 Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click AdministrationSettings.
- 3. Click Activate Community.

SEE ALSO:

Communities Statuses
Customize Communities
Deactivate a Community

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.

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.

EDITIONS

Available in: Salesforce Classic

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

Status

Description



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 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

Activate Your Community

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationSettings.

- **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

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click Administration Settings.

3. Click Deactivate.

Your community is inactive and offline.

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

SEE ALSO:

Communities Statuses
Activate Your Community
Customize Communities

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or activate a community:

 "Create and Set Up Communities"

AND

Change Your Community Template

If you use the Salesforce Tabs + Visualforce template, you can change your template to Koa, Kokua, or the Customer Service (Napili) template in Community Builder.

- Note: Starting with Winter '17, the ability to change templates is no longer supported for communities using the Koa, Kokua, and Customer Service (Napili) templates. The functionality is still available for these templates, but we recommend that you start afresh with a new community instead. If you do change your template from Koa, Kokua, or Customer Service (Napili) to another template type, Salesforce Customer Support will be unable to assist you if any problems arise.
- (1) Important: There is no data loss when you change templates, but some customizations are lost. Be sure to review Considerations for Changing Your Community Template before changing your template.
- 1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click AdministrationSettings.
- 3. Click Change Template.
- **4.** Choose the template you want to switch to.
- **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 switch to the Customer Service (Napili) template, update your pages to use Community Builder pages instead of Visualforce pages. If necessary, customize your community in Community Builder and publish any changes you make.

To learn more about using the Kokua, Koa, and Customer Service (Napili) templates, see the *Using Templates to Build Communities*.

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

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

Considerations for Changing Your Community Template

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



Note: Starting with Winter '17, the ability to change templates is no longer supported for communities using the Koa, Kokua, and Customer Service (Napili) templates. The functionality is still available for these templates, but we recommend that you start afresh with a new community instead. If you do change your template from Koa, Kokua, or Customer Service (Napili) to another template type, Salesforce Customer Support will be unable to assist you if any problems arise.

When you change your template, Salesforce object data carries over, but some branding and component customizations do not. Prepare to redo customizations as necessary.

Changing the community template updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select AdministrationPreferences > Show all settings in Community Management.

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

To learn more about using the Kokua, Koa, and Customer Service (Napili) templates, see the *Using Templates to Build Communities*. To learn more about using the Aloha template, see the Getting Started with the Aloha Community Template for Salesforce Identity.

Manage 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?

Classic

EDITIONS

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

Available in: Salesforce

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 <code>Users</code> in the <code>Quick Find</code> box, select <code>Users</code>, select the checkbox next to the user's name, and then click <code>Reset Password</code>. 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

Set Up Search Engine Optimization (SEO) for Your Community

Have search engines, such as $Google^{\infty}$ or $Bing^{\circ}$, 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.

Available in: Salesforce Classic

Available in: Enterprise, Performance, and Unlimited Editions



Note: For communities that use the Koa, Kokua, and Customer Service (Napili) template, activating a community automatically registers it with Brombone $^{\text{TM}}$, an SEO service.

To manually set up SEO for your community, there are a few standard files and SEO properties that you need to know about.

sitemap.xml

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

If your community supports multiple languages, the site map automatically includes an entry for each supported language as follows:

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

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

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

robots.txt

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

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

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

Page Title and Description properties

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

Salesforce.com: The Customer Success Platform To Grow Yo... https://www.salesforce.com/ ▼ Salesforce.com ▼

Build more meaningful and lasting relationships and connect with your customers across sales, customer service, marketing, communities, apps, analytics, and ...

You can customize the title and description for your community's standard pages in the Page Manager area of Community Builder. However, some pages, such as the Article Detail and Topic Detail pages, set these properties dynamically according to the components on the page. For example, for the Article Detail page, the title and description values are updated according to the article's title and summary, respectively.

IN THIS SECTION:

Create a Custom Robots.txt File for Your Community

The robots.txt file uses include and exclude rules to inform web spiders and robots about which areas of your community to index. To allow only specific areas of your community to be indexed, create a Visualforce page to host this information. After you specify your rules, search engines use the file to index your community pages.

Best Practices for Using SEO in Your Community

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

SEO for Communities FAQ

Answers to common questions about using SEO in your community.

SEE ALSO:

Page Properties and Types in Community Builder

Create a Custom Robots.txt File for Your Community

The robots.txt file uses include and exclude rules to inform web spiders and robots about which areas of your community to index. To allow only specific areas of your community to be indexed, create a Visualforce page to host this information. After you specify your rules, search engines use the file to index your community pages.

Available in: Salesforce Classic

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

USER PERMISSIONS

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

 "Create and Set Up Communities"

Your custom robots.txt file must contain the path to the auto-generated site map—for example, https://<community_URL>/s/sitemap.xml. robots.txt 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.xml
Sitemap: http://<community_URL>/<sub_path>/s/sitemap.xml
</apex:page>
```



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

To create and use a custom robots.txt file:

- 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 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 **AdministrationPages** > **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 created, or click \(\bigsize \) 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 https://<community_URL>/robots.txt. Similarly, to view the site map, navigate to https://<community_URL>/s/sitemap.xml.

SEE ALSO:

Set Up Search Engine Optimization (SEO) for Your Community Best Practices for Using SEO in Your Community

Best Practices for Using SEO in Your Community

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

Available in: Salesforce Classic

Available in: Enterprise, Performance, and Unlimited Editions

- Don't create a custom site map; use the auto-generated sitemap.xml file.
- If you create a custom robots.txt file, ensure that it points to the auto-generated site map—for example, http://community_URL>/s/sitemap.xml.
- If your org supports multilingual Knowledge articles, we recommend against replacing the URL of translated articles with language-specific URLs. Instead, retain the same URL as the base language article.

If your community supports multiple languages, the site map automatically includes an entry for each supported language as follows:

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

- In Page Manager, ensure that each page's Title and Description fields have meaningful entries, where applicable. The page title is used in the browser tab or window, search engine results, and bookmarks. Content in the Description field is shown in search engine results to help people quickly decide whether it's the page they want.
- Before submitting the sitemap.xml file to search engines for crawling, navigate to https://community_URL>/s/sitemap.xml as an unauthenticated user. (We suggest using Google Chrome's incognito mode.) Ensure that the URLs listed in the site map are appropriate for guest users.

If a URL is mistakenly included in the list available to guest users, ensure that the correct permissions are enabled on the guest user profile and that your org is set up correctly. For example, to prevent Case Detail URLs from being included in the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and set the Default Internal Access for Case to *Private*.

- Redirecting HTTP requests to HTTPS is an SEO best practice. Therefore, we recommend against disabling the Require Secure
 Connections (HTTPS) setting on the Site Details. To verify that the checkbox is selected, in Community Management, click
 Administration > Pages > Go to Force.com.
- 301 redirects are a great way to ensure that users and search engines are directed to the correct page. For example, for a URL such as www.my_community.com, we recommend creating a redirect to my_community.com. You can set up these redirects with your DNS provider.

SEE ALSO:

Set Up Search Engine Optimization (SEO) for Your Community Page Properties and Types in Community Builder

SEO for Communities FAQ

Answers to common questions about using SEO in your community.

Available in: Salesforce Classic

Available in: Enterprise, Performance, and Unlimited Editions

Why does sitemap.xml have references to other site maps?

The auto-generated sitemap.xml file is an index file that lists other site maps. sitemap.xml can contain only a limited number of URLs, so if your community contains many site map URLs, we partition them into several smaller site map files.

Does the site map include URLs for Salesforce object pages that come with my community template?

If you created a detail page for the object and enabled the object's "Read" permission on the guest user profile, the URLs for the object's pages are included in the site map.

Does the site map include URLs for the custom object pages that I create?

If you created a detail page for the object and enabled the object's "Read" permission on the guest user profile, the URL for the detail page is included in the site map. However, URLs for the list and related list pages aren't included.

How do I exclude the URLs for Case Detail from the site map and prevent them from showing up in search engine results?

To prevent Case Detail URLs from being included in the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and set the Default Internal Access for Case to *Private*.

Why doesn't the auto-generated robots.txt file appear when I navigate to

https://<community URL>/robots.txt?

Your community must be at the root level of your custom URL for the auto-generated robots.txt file to show up. If you don't have a custom URL set up and are using the *.force.com domain, then a community without the path prefix must exist for robots.txt to show up.

How do I override the content of robots.txt?

You can override robots.txt by creating a Visualforce page to host the information.

Can I remove the /s/ from the default community URL?

No, the /s/ is required in the default community URL.

Is URL rewriting for creating custom vanity URLs supported?

No, URL rewriting isn't currently supported for template-based communities.

Does each article have its own URL?

Yes, each article that appears in the Article Detail page has its own URL, which is retrieved from the Knowledge article's URL Name field.

If your org supports multilingual Knowledge articles, we recommend against replacing the URL of translated articles with language-specific URLs. Instead, retain the same URL as the base language article.

Can I add titles and descriptions to articles for SEO purposes?

Each Knowledge article has a URL Name, a Title, and a Summary field. When the article is displayed in the Article Detail page in Community Builder, these fields are used for the page URL, and thetitle and description tags in the page <head>, respectively.

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

SEE ALSO:

Set Up Search Engine Optimization (SEO) for Your Community

Optional Community Enhancements

Create a Partner Community with the Lightning Partner Management Solution

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales together. This prepackaged solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup, combined with rich branding and a responsive UI, lets you quickly build an exclusive online experience, so you can invite your channel partners and track and monitor your sales together from a single location.

Prerequisites

Prior to installing the solution, make sure your org:

- Includes Partner Community or Partner Portal licenses
- Has Communities enabled

What You Get Out of the Box

The Lightning Partner Management solution contains prepackaged pages, components, business logic, and other features that support channel management (sales + marketing) processes.

Channel managers and partners can create and share leads, opportunities, accounts, and contacts together. In addition, partner communities provides:

- Partner account management
- Partner recruitment, onboarding, and support
- Lead distribution
- Deal registration
- Content library
- Partner analytics
- Marketing development fund management

For detailed information on installing and configuring the Lightning Partner Management solution, see the Salesforce Lightning Partner Management guide.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To install and customize the Lightning Partner Management solution:

- "Customize Application"
 - "Create and Set Up Communities"
 - "Download AppExchange Packages"

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.
- 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 00dxx000001ggxeay, 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.

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.

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>
```

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

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click 💮 in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- Click AdministrationLogin & 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.

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.

The header logo displays at the top left of the standard login page. It is also used when you access the community in Salesforce 1. The header logo doesn't appear on custom login pages.

- **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 Customer Service (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.
- You must publish custom Community Builder pages before they can be assigned to a community. Before you use your custome login page, remember to modify the CommunitiesLoginController Apex controller and the Site.login() Apex method.
- 1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.
 - From Setup, enter All Communities in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community**Management.
- 2. Click **AdministrationLogin & 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.** Optionally, select Allow internal users to log in directly to the community. This setting allows your internal users to use their internal username and password on the community login page.
 - Internal users must be members of the community to log in directly from the community login page. After your internal users log in, they land on the community home page.
- **5.** Select which login options you want to display.
 - By default, users log in to the community using the default community username and password. If you want to allow them to log in with other credentials, such as their Facebook[©], Janrain[©], or Salesforce credentials from another organization, select those from the list.

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

- (1) 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.
- **6.** 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 83 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 your pages, including login pages. Contact Support if you
 want 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 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.

7. 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 Communities Landing.
- 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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click AdministrationLogin & Registration.
- 3. In the Logout section, enter the URL you want to redirect community members to.

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

4. Click Save.

SEE ALSO:

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

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click AdministrationLogin & 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 \(\sqrt{1} \), 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.

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

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next
 to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community**Management.
- 2. Click AdministrationLogin & 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.



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

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 **AdministrationLogin & 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

EDITIONS

Available in: Salesforce Classic

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

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 (Communities SelfRegController), 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.



1. From Setup, enter Apex Classes in the Quick Find box, then select Apex Classes.

of our Services for purposes of the Salesforce Master Subscription Agreement.

- 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** and click the **Manage** link next to a community.
 - **b.** From Community Management click **AdministrationPages** > **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 CommunitiesSelfReqController.Replace CommunitiesCustomSelfReqPage with the name of the custom self-registration page. Then add this to the first line of code in the Communities SelfReg 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 members see the life cycle of a case from start to finish. All case interactions appear in a unified, chronological Chatter case feed. Community members benefit from the added functionalities of Chatter, while support-side features help agents provide efficient, personalized support.

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

- Chatter text, file, and link posts
- Questions in Chatter that are associated with the case
- Case emails
 - Note: To learn more about case email visibility, see Emails in the Community Case Feed.
- Read-only social posts on cases if your Salesforce administrator enables them

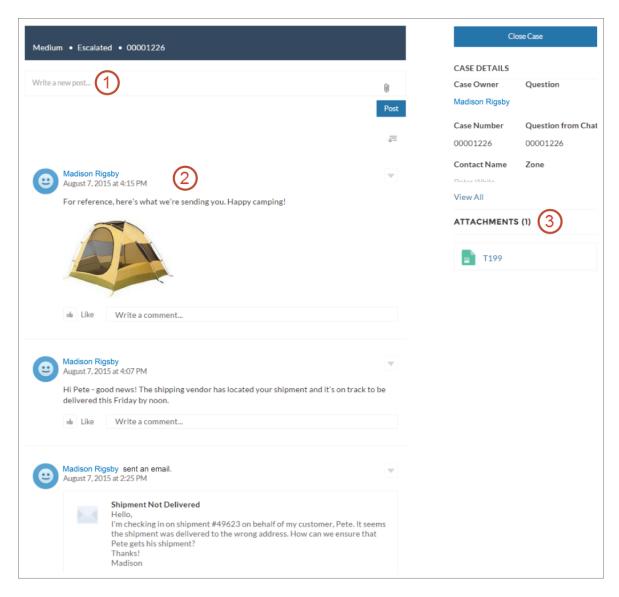
Χ

Community case feed in a community built on the Customer Service (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. Also, agents can take more actions directly from the console. To set up the community case feed, enable it in your organization and make sure that the case page in your community is properly configured.

- (1) Important: Before setting up the community case feed, read Community Case Feed Considerations.
- 1. Enable the community case feed:
 - **a.** From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
 - b. Select Enable Community Case Feed.
 - c. Optionally, select Enable Email Notifications for Case Posts (recommended).
 - d. Click Save.
- 2. If your community was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
- **3.** If your community uses the Koa, Kokua, or Customer Service (Napili) template, confirm that your active case detail page supports the community case feed:
 - a. In Community Builder, click
 - 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.

If the community case feed is enabled:

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

EDITIONS

Available in: Salesforce Classic

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

If email notifications for case posts are enabled:

- When someone makes an externally visible post on a case, all case contacts are notified by email. They can comment on the post by replying to the email.
- If you're already using custom email notification settings, such as those triggered by workflows, selecting this preference can create duplicate email notifications.
- In communities built on the Customer Service (Napili) template or Salesforce Tabs + Visualforce, you can turn off these notifications. In your email notification settings, deselect **Posts on one of my cases** under "Email me when someone...".

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

Make Public option on a case Chatter post:

EDITIONS

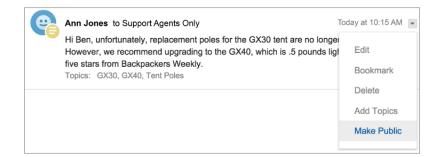
Available in: Salesforce Classic

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 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:

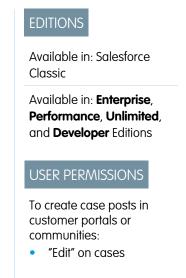
Community Case Feed

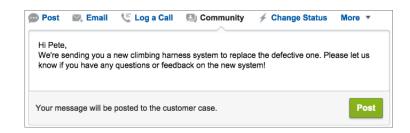
Post on Cases and Community Questions with the Community Action in the Case Feed

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.

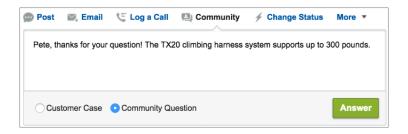
To post on cases in a customer portal or community:

- 1. Click **Answer Customer** on the Case Feed page.
- 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.





- **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.



SEE ALSO:

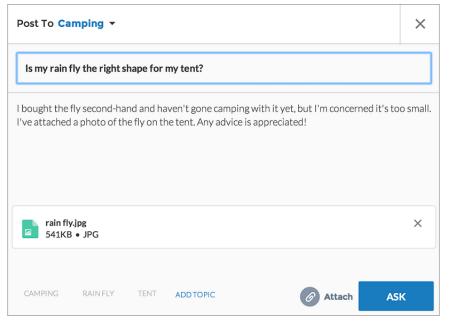
Community Case Feed

Enable Chatter Questions in Your Community

Chatter Questions helps you promote community engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and communities can answer questions in Chatter just as they would comment on a Chatter post. Users in communities built on the Customer Service (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** and click the **Manage** link next to a community.
 - b. Click AdministrationTabs.
 - 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

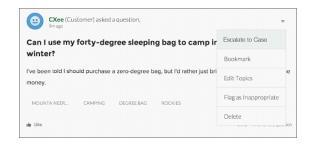
Add Question-to-Case to your communities, your Salesforce organization, or both.

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

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. You can write a workflow rule or process that automatically adds cases that were created from questions to a queue so agents can claim them.

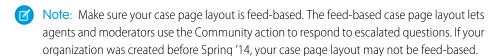
7. Automatically Create Cases from Unresolved Questions in Chatter

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.

- 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.



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

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

Record types available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To assign record types:

"Customize Application"

Customize the Escalate to Case Action Layout

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

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



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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize page layouts:

"Customize Application"

Automatically Assign Cases from Questions to a Queue

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

Automatically Create Cases from Unresolved Questions in Chatter

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

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

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

- Create a case from a question if a week has passed, the question has received more than 10 likes, and a best answer hasn't been selected.
- Create a case from a question immediately if the question contains the word "competitor."

EDITIONS

Available in: Salesforce Classic

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

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

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

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

Tip:

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

Enable Salesforce Knowledge in Your Community

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.

EDITIONS

Available in: Salesforce Classic

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

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** Edition.

USER PERMISSIONS

To create, customize, or 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"

Available in: Salesforce

Available in: Enterprise,

and **Developer** Editions

USER PERMISSIONS

Performance, Unlimited.

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.

EDITIONS

Classic

To customize Ideas settings:

- "Customize Application"
- 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.
 - 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.

- 1. In Community Management, click **AdministrationTabs**, 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.

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"
- **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	AND
accounts and contacts using the Import My Organization's Accounts & Contacts link on the Accounts and Contacts tabs in your community.	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 automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.



Note:

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

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

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



EDITIONS

Available in: Salesforce Classic

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 Salesforce 1, 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.

Complete the following steps to share Wave dashboards in your community.

- 1. Set up Wave Analytics in your Salesforce org, as described in the Wave Platform Setup section.
- **2.** Enable Wave for Communities and set up community members. See Enable Wave Analytics for Communities.
- **3.** 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.
- **4.** Embed your Wave dashboards in Visualforce pages in your community. For more information, see Add a Wave Analytics Dashboard to a Visualforce Page. If you embed a dashboard in a new Visualforce page, create a tab for the page and add the tab to your community.
- **5.** From the Wave app containing your dashboards, give access to community members by selecting **Share**. In the Share dialog, select **Enable sharing with Communities**. Invite community partners and customers to share the app.

For information, see Share Wave with Communities.

Track Field Service Data in Your Community

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

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

Community Security and Authentication

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

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To create, customize, or activate a community:

 "Create and Set Up Communities"
 AND is a member of the community they're trying to update

To modify Wave Analytics settings:

 Analytics Cloud - Wave Analytics Platform permission set license with "Manage Wave Analytics" permission

To view, explore, and share embedded Wave dashboards:

 Analytics Cloud - Wave Community Users permission set license with "View Wave Analytics on Communities Pages" permission

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.

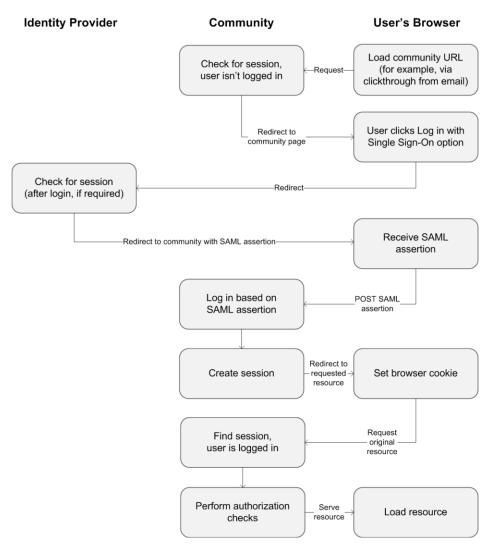
The following information assumes that you are already familiar with Security Assertion Markup Language (SAML) authentication protocols and know how to work with your identity provider to configure single sign-on for your organization. When implementing SAML for communities, the key is to use the community 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"</pre>
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
   <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:nameid-format:</pre>
      entity">https://www.salesforce.com</saml:Issuer>
   <samlp:Status>
      <samlp:StatusCode Value="urn:oasis:names:tc:SAML:2.0:</pre>
         status:Success"/>
   </samlp:Status>
   <saml:Assertion ID=" f690da2480a8df7fcc1cbee5dc67dbbb1245264205456"</pre>
      IssueInstant="2009-06-17T18:43:25.456Z" Version="2.0">
      <saml:Issuer Format="urn:oasis:names:tc:SAML:2.0:</pre>
         nameid-format:entity">https://www.salesforce.com</saml:Issuer>
      <saml:Subject>
         <saml:NameID Format="urn:oasis:names:tc:SAML:1.1:</pre>
            nameid-format:unspecified">saml portal user federation id
         </saml:NameID>
         <saml:SubjectConfirmation Method="urn:oasis:names:tc:</pre>
            SAML:2.0:cm:bearer">
         <saml:SubjectConfirmationData NotOnOrAfter=</pre>
            "2009-06-17T18:48:25.456Z"
            Recipient="https://acme.force.com/customers/login/?
saml=02HKiPoin4f49GRMsOdFmhTqi 0nR7BBAflopdnD3qtixujECWpxr9klAw"/>
         </saml:SubjectConfirmation>
      </saml:Subject>
      <saml:Conditions NotBefore="2009-06-17T18:43:25.456Z"</pre>
                       NotOnOrAfter="2009-06-17T18:48:25.456Z">
         <saml:AudienceRestriction>
            <saml:Audience>https://saml.salesforce.com</saml:Audience>
         </saml:AudienceRestriction>
      </saml:Conditions>
      <saml:AuthnStatement AuthnInstant="2009-06-17T18:43:25.4562">
         <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=00DD000000JsCM"

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:

 $\verb|https://login.salesforce.com/services/auth/sso|| \textit{orgID/URLsuffix}| community = \verb|https://acme.force.com/support|| community = \verb|https://acme.$

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.

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

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

EDITIONS

Available in: Salesforce Classic

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

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

00D50000001ehZ\!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.

Keep the following things in mind:

- You can encrypt data in communities, but not in portals.
- If you are using Classic Encryption, data in encrypted custom fields is still masked.
- Your community's specific settings for personally identifiable information (PII) apply regardless of whether data is encrypted.
- 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.

 Only users with the "View Encrypted Data" permission can create community users from a contact record that contains encrypted standard fields.

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 Customer Service (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, Customer Service (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 and community templates for self-service let you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

With Community Builder and templates, you can:

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

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

Kokua

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

Koa

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

Customer Service (Napili)

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

Aloha

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

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 104
 - Edit community pages and page components.



To learn more about using the Kokua, Koa, and Customer Service (Napili) templates, see the *Using Templates to Build Communities 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 AdministrationPages and AdministrationLogin & 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 <code>?iscontrib</code> to the site's URL. For example: https://sitestudio.nal.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.

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.

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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community**Management.
- 2. Navigate to AdministrationPages.
- 3. Click \(\bigsim \) 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 one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

2. Click AdministrationPages.

- **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 \P , 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.

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

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.

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:

- "Access Community Management" OR
 "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 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 the community name.
 - 3. Click AdministrationPages > 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.



- 1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.
 - From Setup, enter All Communities in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- 2. Click **AdministrationPages** 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

Community Templates

Which Community Template Should I Use?

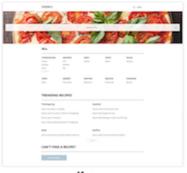
Community templates let you build a community that gives customers the same visual and functional experience on tablets, mobile devices, or their desktops.

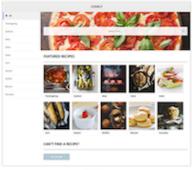
Your customers want an easy way to interact with your company whenever and wherever they are. A self-service community gives your customers an easy way access the information they need when they have questions. With communities built on the Koa and Kokua templates, customers can search for information using knowledge articles and contact support, if necessary. They can search for articles, ask questions, and get crowd-sourced answers from the community in communities built using the Customer Service (Napili) template. 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 Customer Service (Napili)

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

- Kokua is a visually rich self-service template that presents users with knowledge articles organized by data categories. Users can also submit cases to get help from agents.
- Koa is a text-based self-service template that's optimized for mobile devices. It lets users search for and view articles by text representations of data categories, and contact support if they can't find what they're looking for.
- Customer Service (Napili) template lets your customers post questions to the community and search for and view articles. If they don't find what they're looking for, they can contact a support agent.

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

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 language support for guest users in communities. If a guest

user's 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 have 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.

Feature Comparison

	Koa	Kokua	Customer Service (Napili)	Salesforce Tabs + Visualforce
All Salesforce Objects				~
Accounts			~	~
Campaigns			~	~
Cases	~	~	~	~
Community Builder	~	~	~	
Community Discussions			<u>~</u>	~
Contacts and Shared Contacts			~	~
Contacts to Multiple Accounts				~
Custom Objects			~	~
Customizations using Lightning Components	~	~	▽	
Customizations using Visualforce				~
Salesforce Knowledge	Required	Required	Recommended	Recommended

EDITIONS

Available in: Salesforce Classic

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

	Koa	Kokua	Customer Service (Napili)	Salesforce Tabs + Visualforce
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 by Out-of-the-Box Components and Pages in Community Templates

Check out the list of all the objects supported by out-of-the-box components and pages in Community Builder-driven templates.

When we talk about supported objects in templates, we mean that you can use our out-of-the-box components on the object pages, as detailed here.

API names are indicated in parentheses.

	 Headline Record Banner Record Detail Record Information Tabs Related Records 	Navigation MenuObject Home Page	 Create Record Button Create Record Form
Account (Account)	~	~	~
Activity History (ActivityHistory)	~		~
Approval History (ProcessInstanceHistory)	<u>~</u>		<u>~</u>

	 Headline Record Banner Record Detail Record Information Tabs Related Records 	Navigation MenuObject Home Page	Create Record Button Create Record Form
Approval Process Work Item (ProcessInstanceWorkitem)	~		~
Approval Step (ProcessInstanceStep)			
Asset (Asset)	~	~	~
Campaign (Campaign)	~	~	~
Campaign Member (CampaignMember)	▽	✓	
Case (Case)	~	~	~
Contact (Contact)	~	~	~
Custom Objects	~	~	~
Dashboard (Dashboard)	~		~
Email Message (EmailMessage)	✓		✓
Event (Event)	~		✓
External Objects	~	~	✓
Group (CollaborationGroup)	✓		✓
Lead (Lead)	~	✓	~
Note (Note and NoteAndAttachment)	▽		~
Open Activity (OpenActivity)	~		✓
Opportunity (Opportunity)	~	~	~
Opportunity Contact Role (OpportunityContactRole)			
Opportunity Product (OpportunityLineItem)			
Opportunity Team Member (Opportunity Team Member)	▽		
Product (Product2)	✓	~	✓

	 Headline Record Banner Record Detail Record Information Tabs Related Records 	Navigation MenuObject Home Page	 Create Record Button Create Record Form
Report (Report)	~		✓
Service Appointment (ServiceAppointments)	▽	<u>~</u>	~
Shared Contacts (AccountContactRelationship)	▽		~
Task (Task)	~		✓
User (User)	~		✓
Work Order (WorkOrder)	~	~	✓
Work Order Line Item (WorkOrderLineItem)	▽		~



Note: To be searchable in communities, objects must be searchable in Lightning Experience and supported in community templates.

Customer Service (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 Customer Service (Napili) template.

Have you considered everything on these lists?

Before you begin:

Gather your branding assets:

dutier your oranging assets.
High-resolution image of your company logo
Color scheme (or an image to upload to automatically generate one)
☐ Image to use as a header
Thumbnail images (385x385 pixels), if you're using Featured Topics
In your internal Salesforce org:
Enable Salesforce Communities. Choose a unique URL that works for your business, because you can't change it after it's been set.
Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).



Available in: Salesforce Classic

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

Enable the Global Header for Communities for the system administrator profile and any other profiles that can access your community from the internal org.
Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge.
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.

Customize Templates with Community Builder

Community Builder Overview

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

With Community Builder, you can:

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

EDITIONS

Available in: Salesforce Classic

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

Known Limitations

Community Builder doesn't support branding for communities that weren't created by using one of the preconfigured templates.

SEE ALSO:

Navigate Community Builder

Manage Your Community's 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.

To access Community Builder:

- From the global header menu in Community Management, click Community Management >
 Go to Community Builder
- From the All Communities page in Setup, click Builder next to the community name
- From a community, click **Community Builder** in the profile menu

In Community Builder, you can:

- 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). This includes custom Lightning components from the AppExchange.
- Manage, create, delete, and set the visibility of community pages in the Page Manager (3).
- Edit community settings and accept updates to your community's template (4).
- Use the Communities menu (5) to:
 - Go to the community after it's activated.
 - Access Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
 - Return to Setup.

EDITIONS

Available in: Salesforce Classic

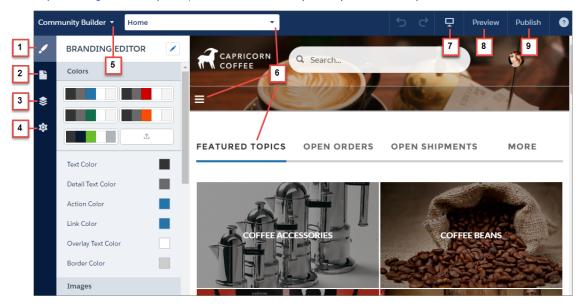
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, customize, or publish a community:

 "Create and Manage Communities"

- Navigate to the community page that you want to edit using the Page menu, navigation menu items, and links (6).
- 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).



SEE ALSO:

Community Builder Overview

Manage Your Community's 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.

EDITIONS

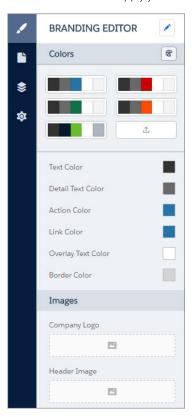
Available in: Salesforce Classic

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

USER PERMISSIONS

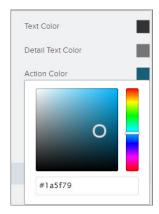
To create, customize, or publish a community:

 "Create and Manage Communities" • Use custom CSS to apply your own styles



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 profile-based page visibility and everything in between.



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

In Page Manager (1), you can:

- Create custom pages (2).
- Search for a page and select it (3) to edit its properties (4).
- Create alternative variations of the selected page and, in Customer Service (Napili), set profile-based page visibility (5).
- Preview, edit, and delete the selected page and its variations (6).

EDITIONS

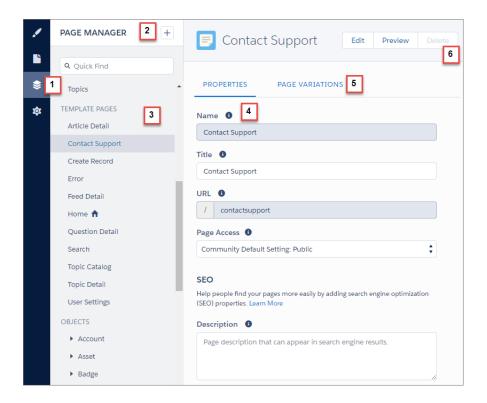
Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

 "Create and Set Up Communities"



Create Custom Pages with Community Builder

Extend your community template by creating custom pages and adding custom record detail, list, and related list pages to get the most from your Salesforce data.

- Note: This functionality is available in the Winter '16 and later versions of the Koa, Kokua, and Customer Service (Napili) templates and the Spring '16 and later versions of the Aloha template.
- 1. In Community Builder, click on the left sidebar to display the Page Manager.
- 2. Click + on the toolbar.
- **3.** To create:
 - A standard page that's based on a blank layout or a preconfigured page (if available), click
 Standard Page.

If you don't have preconfigured pages, choose a blank layout. Alternatively, if you do have preconfigured pages (because you've exported or imported custom pages), choose one to customize or click **New Blank Page** to select a blank layout.

Click **Next**, give the page a unique name, and specify the static portion of the page's URL.

• A detail, a list, and a related list page associated with one of your Salesforce objects, click **Object Pages** (in Customer Service (Napili) only). Select the object that you want to associate with the page.



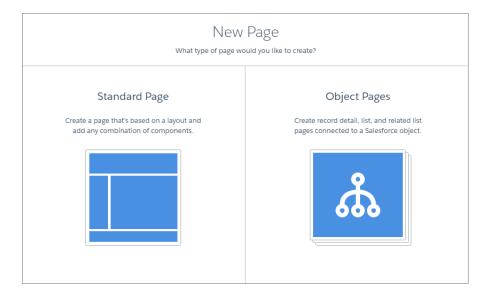
Available in: Salesforce Classic

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

USER PERMISSIONS

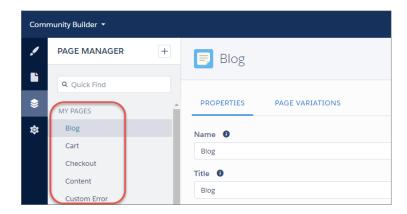
To create pages in Community Builder:

 "Create and Manage Communities

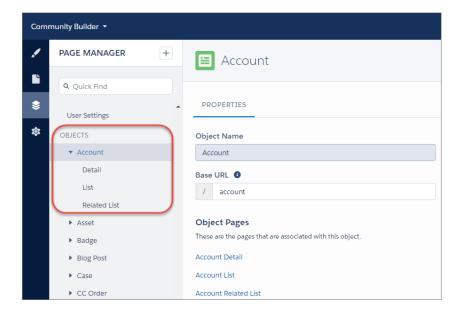


4. Click Create.

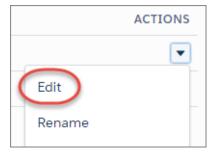
Custom standard pages that are based on a layout appear under My Pages in Page Manager. Pages that are based on a default template page appear under its Page Variations section.



Custom object pages appear under Objects.



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. If you're using the Customer Service (Napili) template, set the page's visibility.
- 8. Preview and publish your community when you're done.
- Tip:
 - When a page is selected in Page Manager, its Page Variations tab lets you quickly create alternative versions of the page. For example, you could create three different Question Detail pages to test out various layouts or styles, or to assign them to different audiences. To create a page variation, click **New Page Variation** in the Page Variations tab.

You can also duplicate a page variation by clicking > **Duplicate**.

• Use the Navigation Menu component to create custom navigation nodes for new pages. For more information about templates and components, see *Using Templates to Build Communities*.

Profile-Based Page Visibility in Community Builder

Profile-based page visibility lets you create one version of a page for your customers and another for your partners, and control who sees which page based on their profile.



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

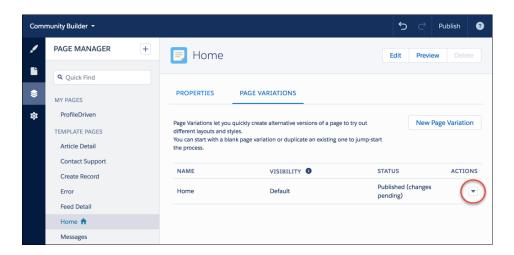
Available in: Salesforce Classic Available in: Enterprise, Performance, Unlimited, and Developer Editions

Page Variations

Page variations are alternative versions of a page. You can use them to try out different page layouts and styles, or create variations that are aimed at distinct audiences. Every page in your community,

including custom pages, must have one default page variation. You can add as many extra variations as you need on the page's Page Variations tab.

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



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





Who Exactly Sees What?

After you create the page variations you need in Page Manager, you can set their visibility. Choose from three visibility options that, when combined with a page's published status, determine whether a page is visible to your community members.

Default: All users unless set by profile

When the page is published, it's visible to all valid community members, except members whose profiles are assigned to a different page variation. Each page must have one default page variation.

By Profile

When the page is published, it's visible only to users with the selected profiles.

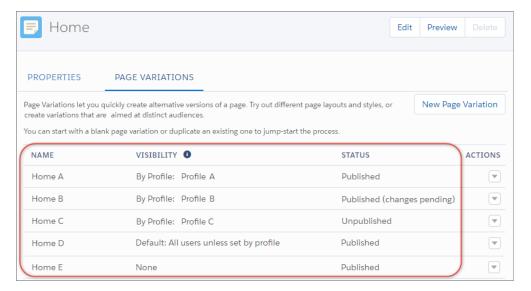
None

Even if the page is published, it's not visible to users.



Example: Here are several Home page variations with differing visibility and published statuses.

- Home A is visible only to Profile A members.
- Home B is visible only to Profile B members, but they can't see pending changes.
- Home C isn't visible.
- Home D is visible to all members, except Profile A and Profile B members.
- Home E isn't visible.



Manage Page Visibility in Community Builder

Choose from three visibility options that combine with a page's published status to control whether a page is visible to your community members.



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

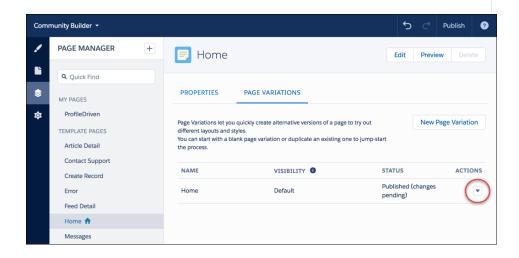
To assign profiles to a page variation.

- 1. In Page Manager, select the page in the menu on the left.
- 2. Open the Page Variations tab.

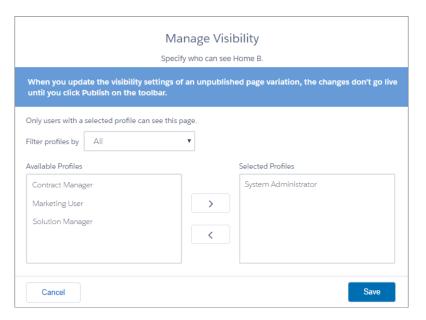


To customize or publish a community:

 "Create and Set Up Communities"



- 3. Click > Manage Visibility.
 - Note: If a page variation's visibility is set to Default, you can't access the Manage Visibility dialog box. Every page must have one default page variation.
- **4.** Select the profiles that you want.



- 5. To update the visibility settings of:
 - An unpublished page, click Save. The visibility changes don't go live until you publish your community.
 - A published page variation, click **Publish Visibility Changes**. The visibility changes go live immediately, but any other pending changes must be published separately.

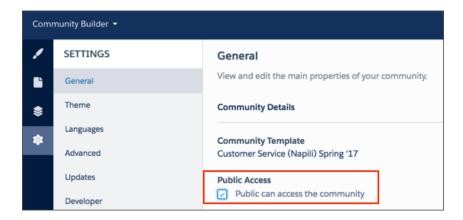
To set the visibility of a page variation to Default, click > Set Visibility to Default.

To set the visibility of a page variation to None, remove any assigned profiles or set the visibility of another variation to Default, as appropriate.

Control Public Access for Each Page in Your Community

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

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

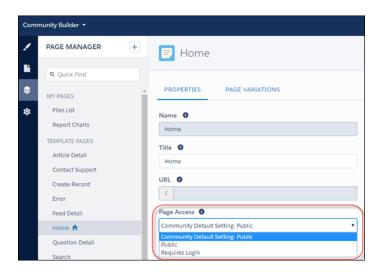


Use the Page Manager to set page-level access.

Community Default Setting: This setting reflects your choice for Public Access under General Settings. If you allow public access, your community pages are accessible to the public, including unlicensed users by default. If not, members must log in to access the community.

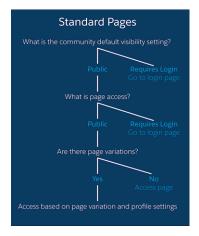
Public: This setting makes the page public, regardless of the community's default setting.

Requires Login: This setting makes the page private and requires members to log in, regardless of the community's default setting.

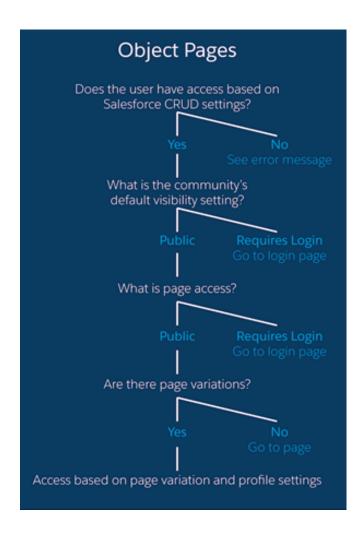


You're probably thinking, "Wait a second. How does this work with profile-based page visibility in Community Builder?" Here's how.

When a member is trying to access a page, we first check the community's default setting. Is it public or does it require users to log in? After that first check, we look at the page access. Once that's cleared, we finally check the profile-based visibility you set in Page Variations. How does this logic work for standard pages?



And what, pray tell, would be the logic behind pages that show object data?



Ø

Note: There are some exceptions to the rule, as per usual. Some pages are always public, while others are always private. Public pages include login-related pages (Login, Register, Forget Password, Login Error, Check Password). Direct message pages are always private.

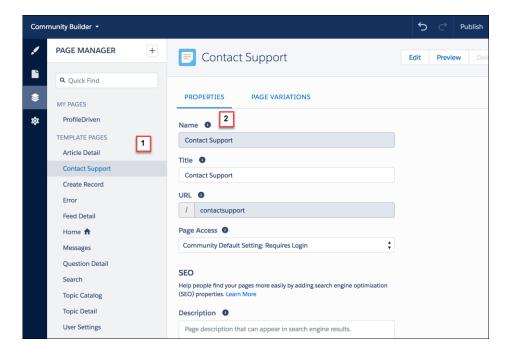
Page Properties and Types in Community Builder

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 standard pages that you create. (The object pages that you create appear under Objects.)

Template Pages

The default pages that come with the community template.

Objects

The pages of the objects in your community, which include the object's record detail, list, and related list pages.

Generic Record Pages

The default record detail, list, and related list pages that come with the Customer Service (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.

Name

The name of the page as it appears in Community Builder. Editable only in the standard pages that you create.

Title

The title of the page as it appears in the browser's tab or window title. Used for bookmarking the page and appears in search engine results.

Unavailable for pages in the Template Pages section that set the title dynamically, such as the Article Detail and Topic Detail pages.

By default, detail and list pages in the Objects section set the title dynamically, so although the Title field is available, its value is overridden. However, if you replace the page's default component with a custom Lightning component that doesn't set the page title dynamically, then the title you set here is used.

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.

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.

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 Customer Service (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.





Available in: Salesforce Classic

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

USER PERMISSIONS

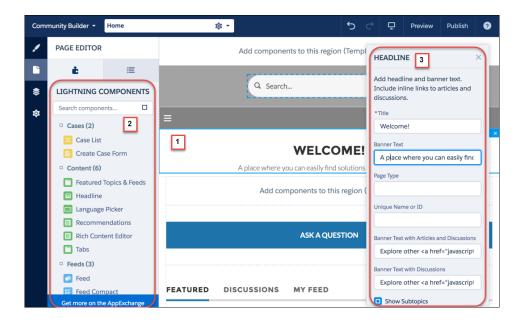
To customize or publish a community:

"Create and Set Up Communities"

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 floating property editor.
- 5. Update the component as required.





Tip:

- You can browse a selection of custom Lightning components on the AppExchange and add them to your org directly from Community Builder. Click Get more on the AppExchange in the Page Editor. Components that are ready to add to your community's Lightning pages are displayed. When you add a component, it appears in the Lightning Components pane of all the template-based communities in your org.
- You can also create custom Lightning components and use them on community pages. For more information on creating custom Lightning components and enabling them for Community Builder, see the Lightning Components Developer's Guide.

IN THIS SECTION:

Error Messages for Pages Without Data in Community Builder

When you build a template-based community page using Lightning components in Community Builder, you sometimes run into a situation in which a page isn't loading correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

Error Messages for Pages Without Data in Community Builder

When you build a template-based community page using Lightning components in Community Builder, you sometimes run into a situation in which a page isn't loading correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

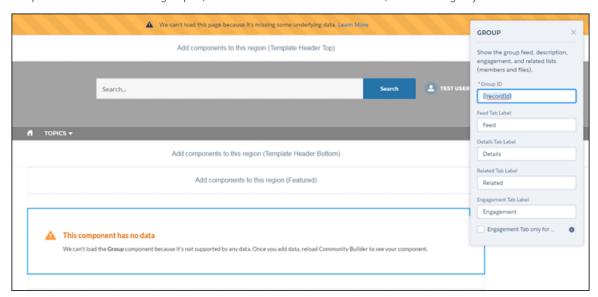


We can't load this page because it's missing some underlying data. Learn More

An error occurs on community pages in one of the following three instances:

- The page does not have any components
- The page has one or more components, and one or more do not have any underlying data

You see this error when components rely on dynamic data, and they don't find any underlying data to draw upon. For example, a Group component that doesn't find a group ID, or a record that can't find a record ID, would both give you an error.



Why do I see this error?

In most situations, the page is trying to draw information where information doesn't exist. For example, let's say you make a record detail page for the Account object. If you don't have any accounts set up in Salesforce, you see an error. Or let's say you set up a group detail page, but your new community doesn't have any groups. Once again, you see an error.

Any gotchas?

The Customer Service (Napili) template uses topics to organize content in a community. To see topic detail pages, first set up Navigational Topics in Community Management.

The following default pages in the Customer Service (Napili) template can show this error. Here are some tips on how to fix it.

- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Topic Detail: Create a Navigational Topic.
- Question Detail: Create a Navigational Topic. Use the Ask a Question button to create a question.
- Feed Detail: Use the Post Publisher or Ask a Question button to create a post or question.
- Group Detail: Create a group in the community.

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

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

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

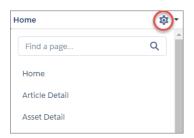
Home: Associate a Data Category with the template.

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

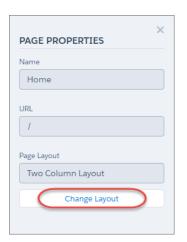
Change the Content Layout in Community Builder

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

- Note: This functionality is available in the Winter '16 and later versions of the Koa, Kokua, and Customer Service (Napili) templates and the Spring '16 and later versions of the Aloha template.
- 1. In Community Builder, 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 and click Page Properties.



3. Click **Change Layout** in the property editor.



4. Select the new layout. If you've added a custom layout, you see both ready-to-use and custom content layouts displayed together.



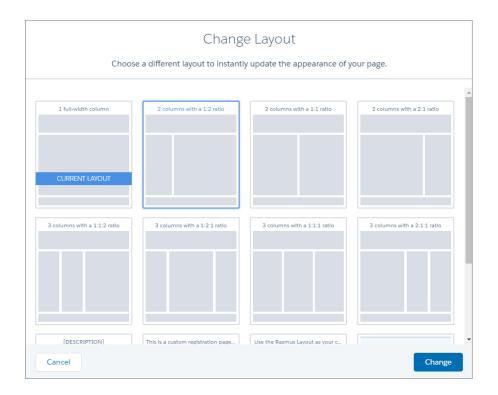
Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

 "Create and Set Up Communities"



5. Click Change.

If the structure of the new layout is different from the current layout, some regions are not visible. However, the regions are still available and you can switch to a different layout at any time.

Note: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

For more information on custom layouts, see the Lightning Components Developer's Guide.

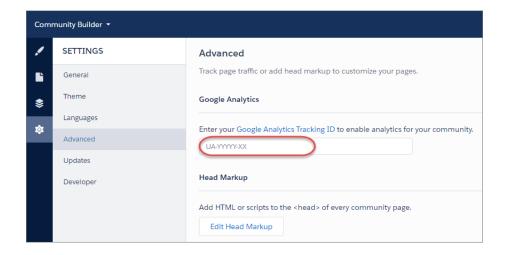
Track Community Users with Your Google Analytics Tracking ID

Enable page tracking in your community with Google Analytics $^{\text{\tiny{M}}}$ to learn more about the pages your customers visit. Then, adjust your community's pages to more accurately reach your customers.

To track using Google Analytics:

- 1. In Community Builder, click on the left sidebar and click **Advanced**.
- 2. Enter your Google Analytics ID.





3. To enable the service, publish the community.

Your community's analytics data streams directly to the Google Analytics service where you can review and interpret it.

Note: Google Analytics is not supported in the Sandbox environment.

For developers of custom Lightning components for Communities, we provide the global forceCommunity:analyticsInteraction event. Use this event to track events triggered by the custom component.

SEE ALSO:

Lightning Components Developer Guide: forceCommunity:analyticsInteraction

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 '16 and later versions of the Koa, Kokua, and Customer Service (Napili) templates and the Spring '16 and later versions of the Aloha template.

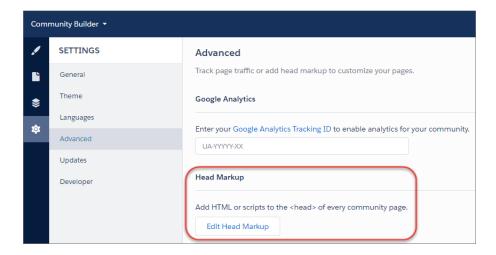
For example, you can customize your community's pages to suit your needs by adding:

- 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**.



To customize or publish a community:

 "Create and Set Up Communities"

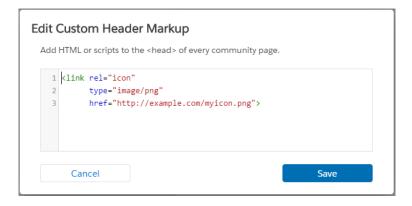


2. Click Edit Head Markup.

- 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.



Delete a Page in Community Builder

Remove a community page or page variation that you no longer need by deleting it in Page Manager. Keep in mind that you can't delete:

- The default pages and objects that come with the template
- A page's default page variation
- A custom object page (detail, list, or related list) but you can delete the entire object
- 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 > **Delete** in the Page Variations tab.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize or publish a community:

 "Create and Set Up Communities"

Share More Salesforce Object Data in Your Community

The Customer Service (Napili) template allows you to share record data for accounts, cases, contacts, tasks, events, and custom objects with minimal configuration. Record data respects user permissions via licenses, profiles, permission sets, and sharing rules.

- Note: This functionality is available in the Winter '16 and later versions of the Customer Service (Napili) template.
- Create a list of records and link to it.
- Display record details in your community with the out-of-the-box Record Detail page or create
 a custom page.

You can also add groups to your community in the same way.

SEE ALSO:

Using Templates to Build Communities

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

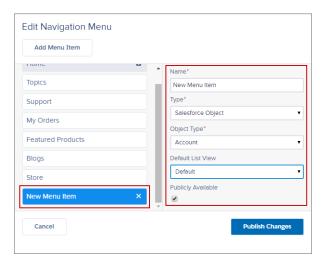
To create, customize, or publish a community:

 "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 Customer Service (Napili) template navigation menu. Use an out-of-the-box or custom page layout to display the list of records.

- Note: This functionality is available in the Winter '16 and later versions of the Customer Service (Napili) template.
- 1. In Community Builder, drag and drop the Navigation Menu component to add it to the appropriate page in the template. We recommend adding it to the Home page.
- 2. Create a navigation menu item pointing to a supported Salesforce object. Currently, the Customer Service (Napili) template supports accounts, cases, contacts, and custom objects.



EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

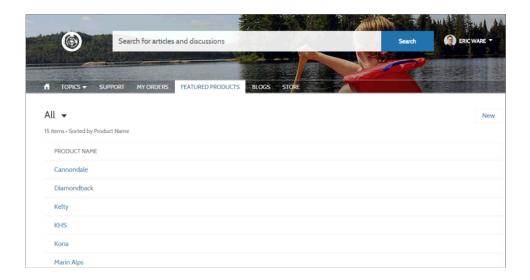
To create, customize, or publish a community:

 "Create and Manage Communities"

- 3. Publish your changes.
 - Note: If your community is active, your navigation menu item changes immediately appear to your community members.

That's it! This creates a navigation menu item, which links to a list of the selected object's records. Under the hood, your data is retrieved from Salesforce and displayed using the generic Record List page. This page is available out-of-the-box in the Customer Service (Napili) template and uses the Record Home List View Lightning component to display data in an appropriate layout.

- Note: The generic Record List page provides the default list view layout for objects that don't have a predefined or custom list view page assigned. For example, if you create a navigation menu item for another Salesforce object, it uses this same page. If you modify the Record List page, be sure to account for all the affected objects.
- Example: A list view page for a custom object called Featured Products.



- Creating a navigation menu item is the easiest way to link to a list of records for an object. If you prefer to use a custom list view page for an object, create a new page for your community using Community Builder. Choose the Standard page type with a single-column layout. Add the Record Home List View component to the page, configure the component properties to point to the object, and then publish the page. To link to the page, create a custom navigation menu item and use the internal page URL.
- Users can access only records they have access to via licenses, profiles, permissions, and sharing rules, same as in Salesforce. Users with the "Create" permission for the object can create records from the list view page. The ability to create records from this page isn't supported on mobile devices.
- You can hide a navigation menu item from guest users to block access to the associated record list view page.
- When users click a record on this page, the record details are displayed using the layout from the generic Record Detail page. If you create a custom record detail page and assign it to the object, we use that page instead.
- Clicking a record in the list view displays the record details, which are displayed using the Record Detail page in the Customer Service (Napili) template.
- The Record List page and the Record Home List View component are not available in the Koa and Kokua templates.

SEE ALSO:

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 Customer Service (Napili) template.

The Customer Service (Napili) template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (with a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Headline and Record Information Lightning components to display record data.

- **Record Headline**: Displays the record name and key record highlights along with buttons to edit and delete the record.
- **Record Information**: Displays all record details including related records and the record feed. It also allows users to create new related records and post to the record feed.

EDITIONS

Available in: Salesforce Classic

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

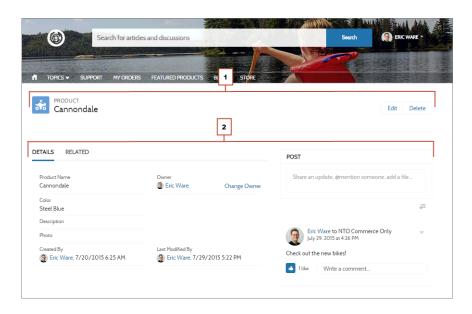
USER PERMISSIONS

To create, customize, or publish a community:

 "Create and Manage Communities"

Optionally, you can create custom record detail pages for accounts, contacts, cases, tasks, events, and custom objects.

- 1. Create a new Data Detail page in Community Builder and pick a supported object.
- **2.** Add the Record Headline and Record Information components to the page and configure the component properties 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 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 record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Community Builder 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. The fields in the Highlight Panel layout determines what displays in the Record Headline component. This feature includes support for record types. You can modify the page layout, the Highlight Panel, and record type settings in Salesforce Setup.
- Enable feeds on records in Salesforce to allow users to post on them in communities.
- The Record Detail page, the Record Headline component, and Record Information component are not available in the Koa and Kokua templates.

SEE ALSO:

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 Customer Service (Napili) community. Use the out-of-the-box design for groups or create your own customized version of the group detail page using separate components.



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

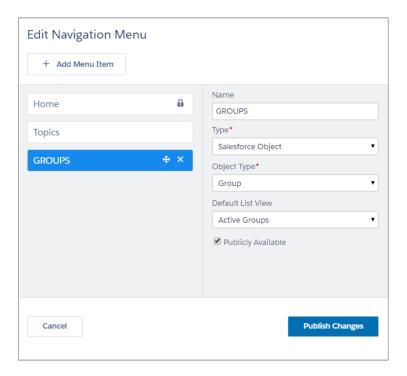
Available in: Salesforce Classic

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

USER PERMISSIONS

To create, customize, or publish a community:

 "Create and Manage Communities"



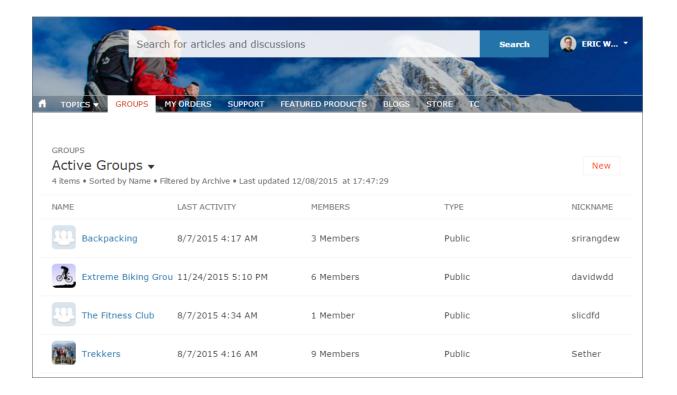
- 2. Publish your community.
- **3.** If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

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.

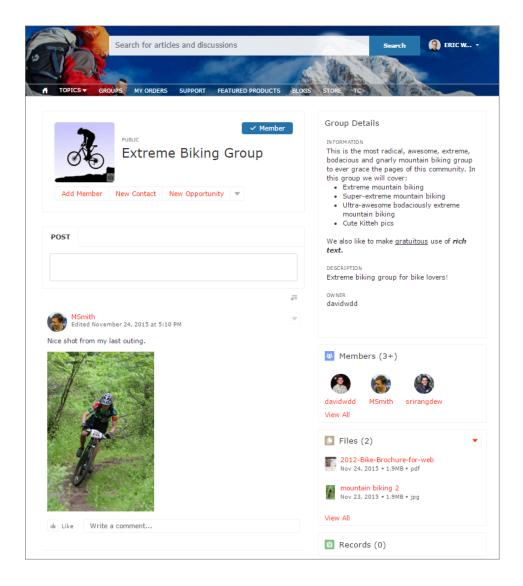
A few things to keep in mind:

- 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 the Customer Service (Napili) Template



Group detail page in Customer Service (Napili) Template



Rebrand Your Community with Custom Theme Layouts

Create custom theme layouts to update the look and feel of your entire Customer Service (Napili) community. Customize the header and footer to match your company's style, and create a custom search bar and user profile menu. Then switch between your custom theme layouts, search, and user profile menus, or package them up to share with other orgs. Whether you're a consulting partner or an ISV, or you simply want to revamp your own community, custom theme layouts make it easy to rebrand



Note: This feature is available for communities using the Winter '16 and later versions of the Customer Service (Napili) template.

EDITIONS

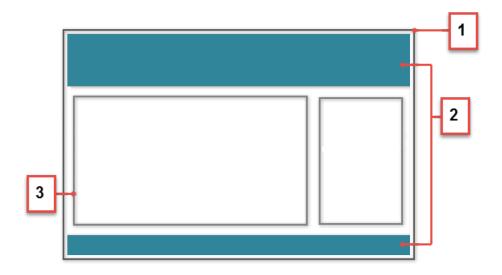
Available in: Salesforce Classic

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

What's a Theme Layout?

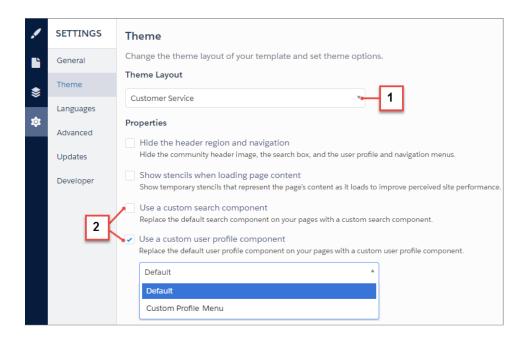
A theme layout is the top-level layout for the template pages (1) in your community. It includes the common header and footer (2), and often includes navigation, search, and the user profile menu. The theme layout applies to all the pages in your community, except the login pages.

In contrast, the content layout (3) defines the content regions of your pages, such as a two-column layout.



How Do Theme Layouts Work?

Developers can create a custom theme layout component in the Developer Console that implements the forceCommunity:themeLayout interface. When the component is ready, you simply select the new theme layout (1) in **Settings** > **Theme** in Community Builder. And instantly all the pages in your community are transformed.

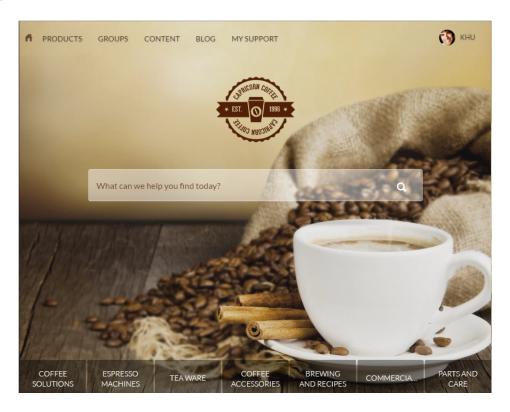


Reuse

If your developer creates a custom search component (using the forceCommunity:searchInterface) or a custom user profile component (using the forceCommunity:profileMenuInterface), you can swap them out too. Select Use a custom search component or Use a custom user profile component (2) and choose the custom component you want.



Example:



For more information on creating custom Lightning components and enabling them for Community Builder, see the Lightning Components Developer's Guide.

Lightning Bolt Solutions: Build Once, Then Distribute and Reuse

Lightning Bolt makes it easy to create and export industry-specific solutions and use them to jump-start new communities, or package and distribute them for others to use. Save time by building once, then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to build communities and cut development costs.





Available in: Salesforce Classic

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



Example: Let's say you specialize in building partner relationship management (PRM) communities for the manufacturing or tech industries. With Lightning Bolt, you can build and export a PRM-focused Bolt solution that's easy to distribute to your customers. After the template is installed on your customer's org, you can further customize it to suit their unique needs. By building the bulk of the solution in your org and then distributing it to your customers' orgs, you can launch their communities in no time.



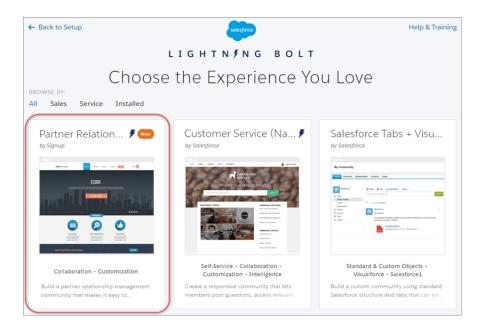
Example: Let's say you're an ISV who builds several custom Lightning components and a custom page to create an e-commerce feature for use in Community Builder. Now you can bundle the page and its components into a single package and distribute it to your customers.

What Is a Lightning Bolt Solution?

At its simplest, a Lightning Bolt solution comprises a community template that's made up of a theme layout and CSS, along with pages, content layouts, and Lightning components. Bolt solutions seamlessly integrate with Salesforce, and incorporate business logic, custom objects, industry best practices, and more.

Use the Customer Service (Napili) template as a base to build your custom template with standard pages and components, or create custom pages, layouts, and components of your own. After you've finished customizing the template, you can export it from the Developer section in the Settings area.

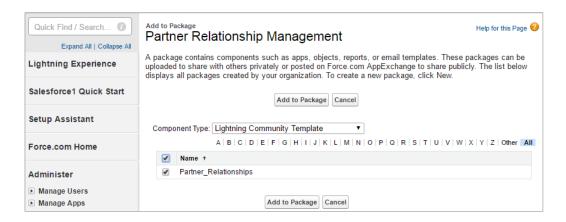
When you export a template, it appears in the Community Creation wizard in your org, where you can use it as a base for building new communities.



Similarly, you can export a single page, which includes the page's content layout and components. After you export a page, it appears in the New Page dialog box in all communities in your org.

What About Packaging and Distribution?

In addition to using exported templates and pages in your own org, you can also package the solutions for distribution to your customers' orgs. After you create and upload a package, you can share the link privately with your clients, customers, or partners.



After a template is installed in another org, it appears in the org's Community Creation wizard. Installed pages appear in the New Page dialog box.

IN THIS SECTION:

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export a template or page as a Bolt solution, keep the following considerations and limitations in mind.

Lightning Bolt Solutions: Export and Package Customized Templates

Lightning Bolt solutions enable you to customize and export the Customer Service (Napili) template to use as a base for your new communities, or package and distribute it for others to use.

Lightning Bolt Solution: Export and Package Customized Pages

Export pages that you've customized in the Customer Service (Napili) template to use as a base for new pages, or package and distribute them for others to use.

SEE ALSO:

Lightning Components Developer Guide: Using Lightning Components in Community Builder *ISVforce Guide*: Creating and Uploading a Managed Package

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export a template or page as a Bolt solution, keep the following considerations and limitations in mind.



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



Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.



Single Page Export and Packaging

- The exported page name must be unique.
- When you export a page, the system automatically generates a developer name (devName) for it by prepending the community name and removing any non-alphanumeric characters. For example, My #awesome page in the Acme community becomes

 Acme My awesome page. Developer names longer than 80 characters are truncated.

Exported page variations use the naming convention [Community Name] [Page Name] [Variation Name].

Original Page Name	Exported Page Name	Exported Page Developer Name	
Coffee Fans	Coffee Fans	Acme_Coffee_Fans	
West Coast (page variation)	Coffee Fans - West Coast	Acme_Coffee_Fans_West_Coast	
East Coast (page variation)	Coffee Fans - East Coast	Acme_Coffee_Fans_East_Coast	

st_Coast			

- Assets, including images in the Rich Content Editor, aren't included in the export process.
- Some page properties, such as Page Description and profile-based visibility criteria, aren't included in the export process. Manually reenter this information after importing the page to the community in the destination org.
- Page variations aren't included in the package; you must export them separately.
- You can't export login pages.

Template Export and Packaging

- The exported template name must be unique.
- In the Community Creation wizard, the template author (for example, by Salesforce) for exported and imported templates differs.
 - When you export a template, your org name is shown within your own org.
 - When you import a template, the publisher name of the package is shown.
- If you upgrade a managed template package, existing communities that are based on the upgraded template aren't updated.
- When you export a template, the system generates a developer name (devName) for the template by prepending the community name and removing any non-alphanumeric characters. For example, My Template #2 in the Acme community becomes My_Template_2. For the template's pages, the system uses the same naming convention as single exported pages described above. Developer names that are over 80 characters are truncated.
- The following items are not included when you export a template. After you import the template and use it create a community in the destination org, you must manually reconfigure these items.
 - Assets, including images in the Rich Content Editor
 - Customizations to the Check Password, Forgot Password, Login, Login Error, and Register pages
 - Custom theme layouts that aren't in use—only the theme layout that's selected in Settings > Theme is included
 - Navigation Menu items
 - Note: If you've created a custom navigation menu component (using forceCommunity:navigationMenuBase), the component is included in the package but its navigation settings aren't.
 - Non-default page variations; only default page variations are included. If a page doesn't have a default variation—for example,
 a page with two variations that are both set to profile-based visibility—the page is excluded entirely.
 - Branding Editor properties and CSS customizations
 - Community Builder settings, including head markup and the Google Tracking ID
 - Community Management settings

Localized content for multilingual communities

SEE ALSO:

Lightning Bolt Solutions: Export and Package Customized Templates Lightning Bolt Solution: Export and Package Customized Pages ISV force Guide: Creating and Uploading a Managed Package

Lightning Bolt Solutions: Export and Package Customized Templates

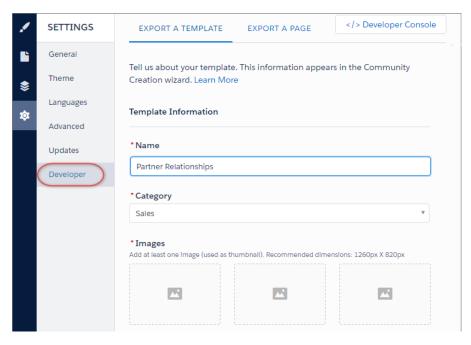
Lightning Bolt solutions enable you to customize and export the Customer Service (Napili) template to use as a base for your new communities, or package and distribute it for others to use.

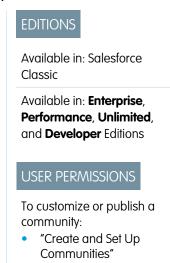


1. Go to **Settings** > **Developer**.

The information that you add on this page appears in the Community Creation wizard and helps users understand the purpose and benefits of your template.

2. Add a unique name for the template and select a category.

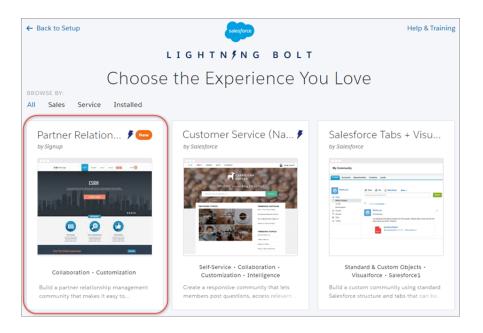




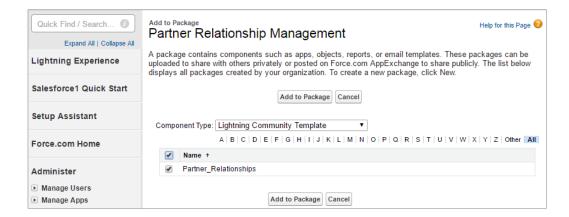
- **3.** Add at least one image, which is used as the thumbnail image. The recommended image dimensions are 1260 x 820px. You can add two more images that appear in the detailed description of the template.
- **4.** Enter a summary that describes the purpose of the template.
- **5.** Enter at least one key feature of your template.

 The feature titles appear under the thumbnail in the Community Creation wizard, and the feature descriptions appear in the template's detailed description.
- 6. Click Export Template.

After you export a template, it appears in the Community Creation wizard in your org, where you can use it as a base for building new communities. Similarly, if you package the template and install it in another org, the template appears in that org's Community Creation wizard.



- **7.** If you want to package the exported template:
 - a. From Setup, enter Package in the Quick Find box, and then click Packages.
 - **b.** Select **Lightning Community Template** as the component type.



c. Upload the package, and share the link privately with your clients, customers, or partners.



Note: To delete exported and imported templates, from Setup, enter *Lightning Community Templates* in the Quick Find box, and then click **Lightning Community Templates**.

Deleting a template from your org doesn't affect communities that are already based on the template.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions ISV force Guide: Creating and Uploading a Managed Package

Lightning Bolt Solution: Export and Package Customized Pages

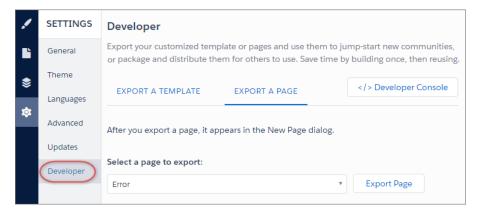
Export pages that you've customized in the Customer Service (Napili) template to use as a base for new pages, or package and distribute them for others to use.



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

To export a page and its components:

1. Go to **Settings** > **Developer** and click **Export a Page**.





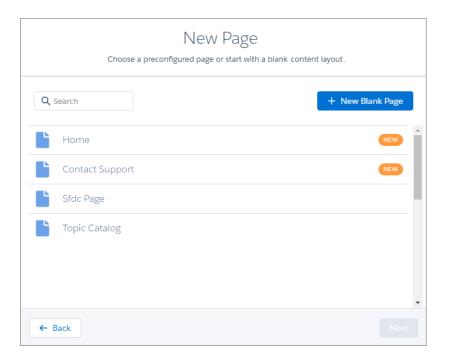
USER PERMISSIONS

To customize or publish a community:

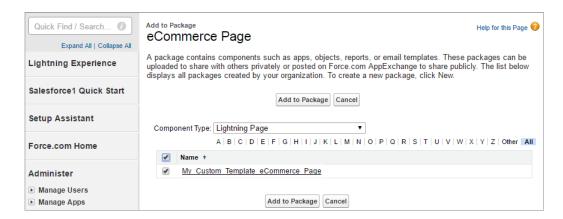
"Create and Set Up Communities"

- **2.** Select the page to export.
- 3. Click Export Page.

After you export a page, it appears in the New Page dialog box in all the communities in your org. Similarly, if you package the page and install it in another org, it appears in the New Page dialog box of that org. Newly installed pages are highlighted as New for 30 days.



- **4.** If you want to package an exported page:
 - a. From Setup, enter Package in the Quick Find box, and then click Packages.
 - **b.** Select Lightning Page as the component type.



c. Upload the package, and share the link privately with your clients, customers, or partners.



Note: To delete imported and exported pages, from Setup, enter *Lightning Community Pages* in the Quick Find box, and then click **Lightning Community Pages**.

Existing pages in Community Builder that are based on the deleted page are unaffected. However, deleted pages no longer appear in the New Page dialog.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions ISV force Guide: Creating and Uploading a Managed Package

External Data Sources in Your Community

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

Let your community users access:

- Data that's stored in another Salesforce org, SAP® NetWeaver Gateway, or IBM WebSphere® that your org accesses via Salesforce Connect
- Content that's stored in Google Drive or SharePoint that your org accesses via Files Connect

Note:

- High-data-volume external data sources aren't supported.
- If the external data source has Identity Type set to Per User, Customer Service
 (Napili) template community users can't set up their own authentication settings for
 external systems. However, you can set up and manage each user's authentication settings
 for external systems from Lightning Experience or Salesforce Classic.

EDITIONS

Available in: Salesforce Classic

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



Or maybe you store your templates for contracts and other agreements in a non-Salesforce environment. Your sales partners can access the latest versions of that content as needed.

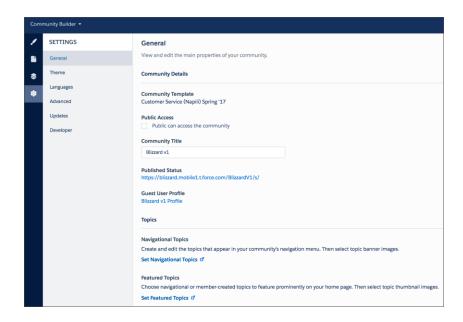
SEE ALSO:

Salesforce Connect
Identity Type for External Data Sources

Manage Your Community's Settings in Community Builder

Use the Settings area to track which template you're using, view your community's status, and customize your template. If you're using the Customer Service (Napili) template, easily access your navigational and featured topic settings.

To access the Settings area in Community Builder, click on the left sidebar.





• In the General area, 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 *Using Templates to Build Communities Guide*.

Set Featured and Navigational Topics (Customer Service (Napili) template only)

Define featured topics and topics to be used for navigation in Community Management.

In the Theme area, you can select:

Hide the header region and navigation

(Customer Service (Napili) Winter '16 and Koa, Kokua, and Customer Service (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. Not available for imported or exported templates.

Show stencils when loading page content

(Customer Service (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. Not available for imported or exported templates.

- In the Languages area, you can access Site.com where you can set the multilingual properties for your community. When set, these properties are used by the Language Picker component, which lets guest users select their preferred language on a page in your community. See "Language Picker" in the *Using Templates to Build Communities Guide*.
- In the Advanced area, you can add markup to the page head.
- In the Updates area, you can update your community's template to the latest version.
- In the Developer area, you can export customized templates and pages.

Update Your Community's Template

We introduce amazing features and enhancements with every release, so don't get left behind! Make the most from the latest Community Builder and template features.

(May 2016), we stopped supporting Koa, Kokua, and Customer Service (Napili) template versions from before Winter '16 (October 2015). To continue receiving Salesforce support for your template, update it to the latest version. If you don't update your template, it doesn't affect your community. However, if issues arise with outdated templates, Salesforce Customer Support won't be able to assist you.

If your community uses the Summer '16 version of the templates, sit back and relax. We automatically update your template version to the latest version, so you can start adding the latest features to your community straight away.

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

Template Type and Version	What to Expect When Updating to Winter '17	
Spring '16 and later versions of Koa, Kokua, or Customer Service (Napili)	All updates are automatically applied. Your customizations and branding are preserved along with your data.	
Winter '16 Koa, Kokua, or Customer Service (Napili)	 Your customizations are maintained for all pages, except login pages. Login pages retain branding but lose custom code or component customizations. 	
Before Winter '16 Koa, Kokua, or Customer Service (Napili)	Most component customizations and properties are overwritten. However:	
Before Spring '16 Aloha template	For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over.	

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

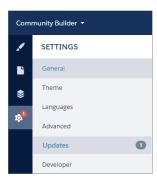
To update your template

 "Create and Manage Communities"

Template Type and Version	What to Expect When Updating to Winter '17
	• For Customer Service (Napili), topic definitions carry over. Most branding properties defined using the Branding Editor in Community Builder are maintained. However, sometimes your community's colors are reset to the default value. After you update the template, check the branding properties and update the ones that were reset.
Salesforce Tabs + Visualforce	Template updates for communities using Salesforce Tabs + Visualforce aren't managed from Community Builder.

For information on component compatibly with older template versions, see "Which Components Can I Use with Each Template?" in the *Using Templates to Build Communities* guide.

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 (for Winter '16 or older versions of templates):

- 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 and 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 Settings in Community Builder Community Builder Overview

Considerations for Changing Your Community Template

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



Note: Starting with Winter '17, the ability to change templates is no longer supported for communities using the Koa, Kokua, and Customer Service (Napili) templates. The functionality is still available for these templates, but we recommend that you start afresh with a new community instead. If you do change your template from Koa, Kokua, or Customer Service (Napili) to another template type, Salesforce Customer Support will be unable to assist you if any problems arise.

• When you change your template, Salesforce object data carries over, but some branding and component customizations do not. Prepare to redo customizations as necessary.

Changing the community template updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select AdministrationPreferences > Show all settings in Community Management.

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

To learn more about using the Kokua, Koa, and Customer Service (Napili) templates, see the *Using Templates to Build Communities*. To learn more about using the Aloha template, see the *Getting Started with the Aloha Community Template for Salesforce Identity*.

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** on the toolbar.



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



EDITIONS

Available in: Salesforce Classic

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

EDITIONS Available in:

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" Use the options in the menu to preview how the community looks on different devices:

- For smartphones, click Mobile.
- For tablets, click **Tablet**.
- For desktop computer screens, click **Desktop**.



SEE ALSO:

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

Publish Your Customizations with Community Builder

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

- (1) Important: Publishing a Koa, Kokua, or Customer Service (Napili) community for the first time activates the community URL and enables login access for community members. The community doesn't have to be active.
- 1. From Setup, enter All Communities in the Quick Find box, then select All Communities and click the Manage link next to a community.
- 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. An email notification informs you when your changes go live.

SEE ALSO:

Community Builder Overview

Preview Your Community with Community Builder

Implementation Guide: Using Templates to Build Communities

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"

Community Management

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

IN THIS SECTION:

Community Managers, Moderators, and Admins Working Together

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

Measure Community Success with Dashboards

Use Community Management dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

Insights for Community Engagement

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

Community Moderation Strategies and Tools

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

Organize Self-Service Communities with Topics

Navigational and featured topics are a fantastic way to organize content in a community. Use topics to structure your community content or highlight key discussions. You can create topics or use the topics that organically emerge from community member posts. You can use topics in the communities built using the Customer Service (Napili) template.

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.

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.

Community Managers, Moderators, and Admins Working Together

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

A community manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony in the community. Sometimes, they perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for monitoring adoption and engagement, the moderator is typically responsible for ensuring the community is a healthy environment and that members feel encouraged to be active and helpful to each other.

Community managers, moderators, and admins all work together to protect, engage, and measure community success.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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



Prevent spammers, bots, and trolls from attacking the community.

Protect the community from trademark infringement and legal issues.

Ensure community members use appropriate language and adhere to the terms of use.



Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.



Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

IN THIS SECTION:

Manage Your Community

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.

What's a Community Manager?

Every community needs someone to take an active role in making sure that the community thrives. Community managers spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

What's a Community Moderator?

Moderators help ensure the success of your community by monitoring user activity and flagged items.

Access Community Management

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

Manage Your Community

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 don't see the Topics section. Some of the options in the following list might not appear in your community. To display all sections, go to AdministrationPreferences 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.

Engagement

Monitor recent activity and take immediate action without leaving Community Management. Insights are set up by the administrator. If the Engagement section 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 section doesn't appear, the administrator hasn't mapped any dashboards for your community.

Moderation

View reports for flagged posts, comments, messages, and files. You can also see a report of all posts that are pending review and set up moderation rules for your community.

Moderation is set up by the administrator.

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 section 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 section doesn't appear, the administrator hasn't set up any.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access Community Management:

- "Access Community Management" OR "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 access moderation rules and 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 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

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 section 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 Salesforce 1. 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 update 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 can't 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's a Community Manager? What's a Community Moderator?

What's a Community Manager?

Every community needs someone to take an active role in making sure that the community thrives. Community managers spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

Community managers must be employees of your organization; external community members can't be community managers.

A community manager is a member of the community that takes on the extra responsibility of monitoring community engagement. Community managers need access to reports and dashboards that show trends in activity and membership. They also need to be aware if members aren't logging in as frequently as they should be. By monitoring community membership and activity, community managers can figure out how to engage community members and ensure that they participate.

EDITIONS

Available in: Salesforce Classic

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

A powerful tool for a community manager is the ability to recognize individual members for their participation, because community managers know that recognition and a little friendly competition usually lead to more active members. Community managers can set up a point system and reputation levels that reward members with points when they perform certain actions. Once members reach the top of the level's point threshold, they move up a level.

IN THIS SECTION:

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

Community managers must be employees of your organization; external community members can't be community managers. To assign a user as a community manager, give them the "Manage Communities" permission. With this permission, they can access the Community Management page.

- 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"

What's a Community Moderator?

Moderators help ensure the success of your community by monitoring user activity and flagged items.

In a successful community, members are actively engaged and communicating with one another. A community moderator facilitates knowledge sharing within a community to help members benefit and derive value from their participation. The moderator also helps ensure that all communications and content in the community are appropriate.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the community feed. This person should be accustomed to interfacing with customers and can spend time regularly monitoring the community.

A moderator can:

- Review and act on the list of flagged posts and comments in the community
- Review and act on the list of flagged files in the community
- Remove flags directly in the community
- Delete inappropriate posts, comments, messages, and files

A moderator can also help drive the success of a community in many other ways.

- Sharing relevant and useful information in community posts
- Encouraging members to post and comment on each other's posts
- Setting an example by their activity in the community
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to communities when it can benefit other community members
- Establishing the community as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator for a community, especially if the community has a large number of members.



Note: Although they share some similar capabilities, a community moderator is different from a Chatter moderator.

IN THIS SECTION:

Which users can moderate?

There are multiple types of users who can moderate a community when flagging is enabled.

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

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 community feed. Moderators can continue to flag items even if flagging is disabled for community members, although group owners and group managers can only moderate when flagging is enabled.

Who can moderate items in a community depends on permissions or if the user is a group manager or owner. This table shows who can moderate and what actions they can take in the user interface.

EDITIONS

Available in: Salesforce Classic

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

Action	User with "Moderate Communities Feeds"	User with "Moderate Communities Files"	Group Owner or Manager (on items in groups they own or manage)*
Remove flags on a post or comment	▽		▽
Delete a post or comment	✓		✓
Remove flags on a file		~	✓
Delete a file		✓	✓

^{*}To allow group owners and managers to moderate, the Allow members to flag content option must be enabled.

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content. Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the community feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions.

Permission	Allows Users To
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the community feed and in Community Management.
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	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to only flagged messages in communities they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.
Moderate Community Users	Freeze external users who are members of the community. Moderators can freeze members on their user profile page or from an Insights report.
Manage Communities	Moderate community content in Community Management.
Access Community Management	Access pages available in 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.

After you grant moderator permissions to a user, keep these things in mind:

- The user can now moderate any items they have access to in all communities they're a member of.
- The user can flag items even if Allow members to flag content is disabled in a community.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the Flag an item as inappropriate email notification.

Access to moderator functionality is slightly different depending on user permissions:

- In the community feed: Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.
- **In Community Management**: Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area in Community Management.

Access Community Management

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

- **1.** Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click Community Management.
 - From Setup, enter All Communities in the Quick Find box, then select All
 Communities and click the Manage link next to a community. To access this page, you
 need the Create and Set Up Communities" permission.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
- **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 Engagement, you can view Insights reports and take action on activity in your community.
 - In Dashboards, you can view community dashboards and reports.
 - In Moderation, you can set up moderation rules and monitor flagged feed items.
 - In Topics, you can manage navigational and featured topics.
 - In Recommendations, you can set up custom recommendations to appear in your community.
 - In Reputation, you can set up reputation levels and points.
 - In Administration, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.
 - 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 don't see the Topics section. Some of the options in the following list might not appear in your community. To display all sections, go to AdministrationPreferences and enable Show all settings in Community Management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access Community Management:

- "Access Community Management" OR "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 access moderation rules and 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 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

Measure Community Success with Dashboards

Use Community Management dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

IN THIS SECTION:

Enable and Map Dashboards for Community Managers

Community managers can use dashboards to measure the success of their communities. 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 its own dashboards.

Create a Dashboard to Display in Community Management

While you can show any dashboard in Community Management, we recommend creating them based on the custom report types available for communities.

View Dashboards in Community Management

Use the dashboards in Community Management to monitor the health of your community.

What's the difference between Insights and dashboards?

Insights let you take immediate action on recent activity in your community, and dashboards let you see trends.

Enable and Map Dashboards for Community Managers

Community managers can use dashboards to measure the success of their communities. 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 its 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. Open Community Management.
- 2. Click DashboardsSettings.
- **3.** For each of the pages, select the dashboard you want to show to community managers. To change the name of the dashboard page, click inside the dashboard label.

EDITIONS

Available in: Salesforce Classic

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

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. 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.

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

While you can show any dashboard in Community Management, we recommend creating them based on the custom report types available for communities.



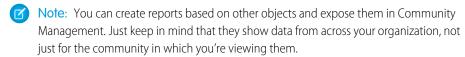
Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards 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.

Only reports that are based on the Networks object show community-specific information in Community Management.



- Select Networks as the primary object.
- Select a child object:
 - Chatter Messages
 - Feed Revisions
 - Groups
 - Network Audits
 - Network Activity Daily Metrics
 - Network Feed Revisions
 - Network Members
 - Network Membership Daily Metrics
 - Network Moderations

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"

- Network Public Usage Daily Metrics
- Network Unique Contributor Daily Metrics
- Recommendation Metric
- Topic Assignments
- Topics
- Unpublished Feed Entities
- **2.** Use the custom report type to create a report.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

- **3.** Create a dashboard with components. Select the report as your source type.
 - Add a component for each report you want to include in your dashboard.
 - 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 **DashboardsSettings** 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 automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it in Community Management. 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 **DashboardsSettings** page in Community Management. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link won't work.

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. Open Community Management.
- 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 automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it in Community Management. 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 **DashboardsSettings** page in Community Management. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link won't work.

SEE ALSO:

What's the difference between Insights and dashboards?

What's the difference between Insights and dashboards?

Insights let you take immediate action on recent activity in your community, and dashboards let you see trends.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view dashboards in Community Management:

"Manage Communities"

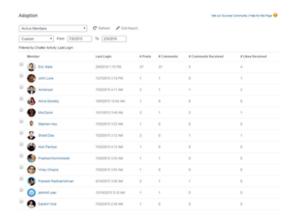
OR

"Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access. Use Engagement to view, monitor, and act on your community's activity. Insights give you a detailed look at a specific area of your community.

Use Dashboards to view your community's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).





view a report about new members in your community that have received the most likes on their posts and comments. This Insights trends in your community. report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

For example, you can visit the **Engagement > Adoption** page to For example, you can visit the **Dashboards > Activity** page to track total posts and comments including overall contribution

SEE ALSO:

View and Customize Insights in Community Management View Dashboards in Community Management

Insights for Community Engagement

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

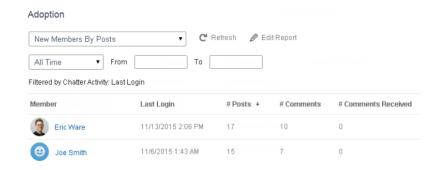


Available in: Salesforce Classic

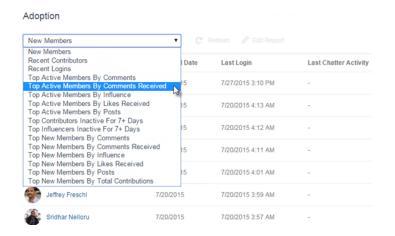
Available in: Enterprise, Performance, Unlimited, and **Developer** Editions

(1)

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.





Tip: 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.

IN THIS SECTION:

Enable and Map Insights for Community Managers

Community managers can use Insights reports to monitor recent activity and take action on that activity. 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.

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.

Create Custom Actions for Community Management Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

View and Customize Insights in Community Management

Use Insights in Community Management to monitor recent community activity and immediately take action. Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Enable and Map Insights for Community Managers

Community managers can use Insights reports to monitor recent activity and take action on that activity. 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 org. 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 org updates the Insights page in Community Management. On the Insights page, links are automatically created for report fields such as Created By or Group Name. For posts, comments, and messages, you can even see the contents directly on the page.



Tip: Get out-of-the-box 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 org. If you have no previous Insights mapped, the package automatically maps them for you. You can change the default mappings at any time.

Use the following steps to map or update your Insights in Community Management:

1. Open Community Management.

2. Click EngagementSettings.

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 Engagement section of Community Management.

Go check out your changes. Click Engagement and then click each Insights page name. Use the drop-down menu to verify the reports mapped to each page.

If you installed the Salesforce Communities Management package, moderation-related Insights reports are also mapped to pages in the Moderation section of Community Management. Unlike the page names in the Engagement section, the page names in the Moderation section can't be renamed or unmapped.

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

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.

Only reports that are 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 show data from across your organization, not just for the community in which you're viewing them.
- Select Networks as the primary object.
- Select a child object:
 - Chatter Messages
 - Feed Revisions
 - Groups
 - Network Audits
 - Network Activity Daily Metrics
 - Network Feed Revisions
 - Network Members
 - Network Membership Daily Metrics
 - Network Moderations
 - Network Public Usage Daily Metrics
 - Network Unique Contributor Daily Metrics
 - Recommendation Metric
 - Topic Assignments
 - Topics
 - Unpublished Feed Entities
- 2. Use the custom report type to create an Insights report.

Insights reports are just like any other report, except they must also meet the following requirements:

- The report can only be a tabular-based report.
- The report can't include pagination.
- We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management.
- To view "Approve" and "Delete" comment actions, you must add the FeedCommentID column to your Insights report.

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" 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 in Community Management.

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 org. 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 org updates the Insights page in Community Management.

- **4.** Share your Insights report folder with your community managers.
- 5. In Community Management, click EngagementSettings to map Insights pages to your report folder.

When a community manager accesses Community Management, the Insights reports appear in the drop-down menu on the mapped Engagement page.



Note: Some Insights are not available in Developer Edition or sandbox orgs.

SEE ALSO:

Track Community Activity

Create Custom Actions for Community Management Insights

Create Custom Actions for Community Management Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action:

1. Create a Visualforce page.

There are a few options you can use:

Use a standard controller

Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.

Use a standard list controller

Choose this option to create a Visualforce page that can display or act on a set of records.

Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

Use a controller extension that uses Apex

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:

"Customize Application"

To edit custom Visualforce controllers:

"Author Apex"

Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or Web services, or if you need finer control for how information is accessed for your page.

All options work with standard objects and custom objects.

For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

- a. In Community Management, navigate to the Insights report that you want to apply your new custom action to.
- **b.** On the report, click 🔯 and then add your custom action from the picklist.
- **3.** Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.

Example: Here's an example of a custom action to delete all activity from a community member. This custom action is great for cleaning up the community after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following DeleteAllActivityControllerExtension class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {
   private List<Id> ids;
   private String retURL;
   private Database.DeleteResult[] deleteResult = null;
   private Map<String, String> resultMap;
   private String success = 'success';
   private String failure = 'failure';
   public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
 {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
       //The return URL to the Insights page is passed in a parameter called "retURL"
        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
 you click the action.
        PageReference retPage = new PageReference(retURL);
        retPage.setRedirect(true);
```

```
Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
        retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
  private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {</pre>
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
           }
        }
  }
  private void deleteFeedComments() {
      List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedComments, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {</pre>
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                       resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
failure);
               }
           }
        }
  private Integer calculateFailureCount() {
       Integer failureCount = 0;
       for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
       return failureCount;
```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.



Note:

- This code example doesn't include any permission checks. This custom action only works for admins.
- The IDs for the items you selected on the Insights report are passed to the Visualforce page using the idsList parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page:

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

SEE ALSO:

Salesforce Help: Visualforce Pages as Global Custom Actions

Visualforce Developer Guide: Standard Controllers

Visualforce Developer Guide: Standard List Controllers

Visualforce Developer Guide: Building a Controller Extension

View and Customize Insights in Community Management

Use Insights in Community Management to monitor recent community activity and immediately take action. Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Each Insights page includes multiple Insights reports. You can access these reports using the drop-down menu on the page. On the Insights page, links are automatically created for report fields such as Created By or Group Name. For posts, comments, and messages, you can even see the contents directly on the page.

Insights are powerful tool that you can use to perform mass-actions. For example, if a spammer attacks your community, you can select all the offending posts and click **Delete Post**.

- (1) Important: Some Insights actions require special permissions. If you can't perform an action, let your admin know.
- 1. Open Community Management.
- 2. Click Engagement or Moderation.
 - Note: Your admin maps Insights pages. If the Engagement section isn't visible or the Moderation section doesn't include any Insights pages, your admin hasn't mapped them yet.

Pages with mapped report folders appear when you expand the sections.

- 3. Click the Insights page you want to view.
 - To access other Insights reports, use the drop-down menu.



EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view Insights in Community Management:

 "Access Community Management" OR "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"
- To filter the report by relative and custom date ranges, use the drop-down date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.
- To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.
- To edit or customize the report, click / to open the report in your internal org. From there you can customize the report to fit your community needs, such as adding or removing columns and updating the report filters.
 - Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.
- To edit the actions assigned to a page, click to open the Edit Insights Actions page.
 - Actions that appear on the Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

Each Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Insights report must have at least one action. Actions displayed in the picklist on the Edit Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Insights reports in Community Management are automatically refreshed when you access them. You can also force an update.

SEE ALSO:

Create Custom Actions for Community Management Insights What's the difference between Insights and dashboards?

Community Moderation Strategies and Tools

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

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. 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 messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your community

To limit the size and types of files allowed in your community, go to the **AdministrationPreferences** page.

To report on moderation activity in your communities, you can use the preconfigured Audit Trail Insights report provided in Salesforce Communities Management package. You can also query the flagged content or activity using the API, or create a custom report type using Networks as the primary object. For more information about the Salesforce Communities Management package, see Report on Communities with the Dashboards and Insights Package.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, community moderation offers some of the same functionality. Transaction Security and communities moderation can be used at the same time.

IN THIS SECTION:

Track Community Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles on the Moderation Overview page of Community Management. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

EDITIONS

Available in: Salesforce Classic

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

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content in two places: directly in the community feed or in Community Management.

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and take action. Group owners or group managers, can view flags and take action on items in their groups.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

SEE ALSO:

Assign a Community Moderator Assign a Community Manager

Track Community Activity with the Moderation Overview Page

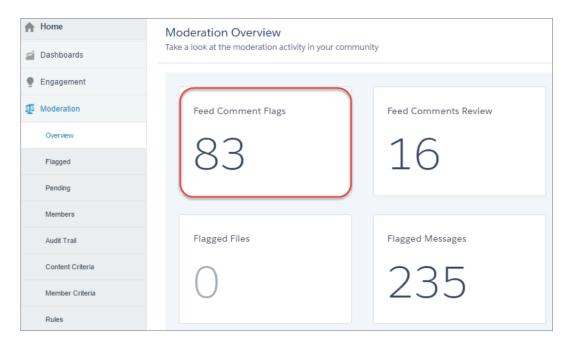
Moderation Insights are arranged in clickable tiles on the Moderation Overview page of Community Management. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

EDITIONS

Available in: Salesforce Classic

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

Example: To view all feed comment flags, click **Feed Comment Flags** and go directly to the Feed Comments Flags Insight report. You can approve or delete flagged comments in bulk, directly from the Insight report.



1 Tip: 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.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

This setting isn't required to flag or moderate items using the API.

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

- 1. Open Community Management.
- 2. Click AdministrationPreferences, then select Allow members to flag content.
- 3. Click Save.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the Flag as inappropriate option.
- Members can flag messages from within the community on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from communities they are members of.



Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

SEE ALSO:

Assign a Community Moderator

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Plan Your Use-Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your community from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that targets users without community contributions.
- Do you want to moderate your internal users' activity in your community? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have community contributions.

Before creating content criteria, think about what you want to moderate.

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.

EDITIONS

Available in: Salesforce Classic

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

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.
- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

IN THIS SECTION:

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes <code>BadWord</code>, it's matched when a user types <code>BADWORD</code> or <code>badword</code>.

Set up content criteria to use in your moderation rules:

- 1. Open Community Management.
- 2. Click ModerationContent Criteria, then click New.
- 3. Enter a name, unique name, and description for your criteria.
- 4. Click Save.
- **5.** Update the keywords in your criteria.

To add keywords, click **Add**.

- Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
- Wildcard characters aren't supported.
- Separate keywords with commas or line breaks.
- When adding keywords, you can copy and paste up to 32,000 characters at a time.
- Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

bad-word

b@dword

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. badword

To delete keywords, select the keywords you want to remove, then click **Delete**.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria is being used by a rule, you can't delete it.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per community.
- Each member criteria can include up to 100 user conditions.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

- **1.** Open Community Management.
- 2. Click ModerationMember Criteria, then click New.
- **3.** Enter a name, unique name, and description for your criteria.
- **4.** Select the types of user types or user profiles to include in your criteria.

You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

If you delete a profile in your internal org, the profile is also removed from your member criteria.

- 5. Select to filter your members by:
 - None—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
 - User creation date—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.
 - Note: A user's creation date might not be the same date they became a member of the community. For example, you can have an internal user that was created 120 days ago who became a member of the community 5 days ago. For users that self-register, their creation date is the date they become a member of the community.
 - Members without community contributions—Select this option to include only members that haven't posted or commented in the community. Posts that are pending review don't count as community contributions until they are approved.

If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

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.



Example: Let's look at the following conditions:

User Types: Partner

User Profiles: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

Filter By: User creation date is set to 7 days since the user was created

This member criteria applies to:

- Partner users created in the last 7 days
- Customer Community Plus Login User created in the last 7 days
- Customer Community Plus User created in the last 7 days
- Customer Community User created in the last 7 days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria is being used by a rule, you can't delete it.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

IN THIS SECTION:

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by

spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the guidelines of the community.



Available in: Salesforce Classic

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

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

If your community uses the Customer Service (Napili) template, moderation rules apply to questions and group posts created by your community members. If you community uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

You can also use the Metadata API or Tooling API to set up content rules.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.
- 1 Tip: Before creating a rule, we recommend that you create criteria to use in the rule.
- 1. Open Community Management.
- 2. Click ModerationRules, then click New and select Content Rule.
- **3.** Complete the following fields:
 - Name—Enter a name for your rule.
 - Unique Name—Enter a unique name for your rule. The unique name used by the API.
 - Description—Optionally, enter a description.
 - Activate Rule—If selected, the rule is activated.
 - Applies To—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
 - Moderation Action—Specify what you want to happen when the criteria is matched.
 - Block prevents the content from being published.
 - Review allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's
 published.
 - Replace publishes the content with the keywords replaced as asterisks. For example, BadWord becomes *******.
 - Flag publishes the content and then automatically flags the content as inappropriate.
 - Message for Member—Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use <code>%BLOCKED_KEYWORD</code>% or other inappropriate words in this community. Review your content and try again." The <code>%BLOCKED_KEYWORD</code>% variable displays up to 5 blocked words. You can also use this variable in your own custom message.
 - Tip: For international communities, you can translate this message. From Setup, enter Translate in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.

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.

- Member Criteria—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- Content Criteria—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?
- (1) Important: Keep the following things in mind:
 - If you activate a content rule without specifying member criteria, the rule applies to all members.
 - If you activate a content rule without specifying content criteria, the rule either:
 - Prevents members from creating posts and comments entirely
 - Sends all posts for review
 - Flags all posts and comments

Yikes! Be careful.

- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

4. Click Save.

SEE ALSO:

Create Content Criteria to Moderate Your Community
Create Member Criteria to Moderate Your Community

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In communities that use the Customer Service (Napili) template, this includes questions and answers.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each rate rule can have up to 10 member criteria.
- ? Tip: Before creating a rule, we recommend that you create member criteria to use in the rule.
- 1. Open Community Management.
- 2. Click ModerationModerationRules, then click New and select Rate Rule.
- **3.** Complete the following fields:
 - Name—Enter a name for your rule.
 - Unique Name—Enter a unique name for your rule. The unique name used by the API.
 - Description—Optionally, enter a description.

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

- Activate Rule—If selected, the rule is activated.
- Applies To—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
- Member Criteria—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to?
 Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last 7 days.

Mote:

- Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules don't
 apply to them.
- If you activate a rate rule without specifying member criteria, the rule applies to all external users.
- Content Creation Time Frame—Select the time frame you want to use.
- Notify Moderators—Enter a number. Moderators are sent an email when a member creates this much content in your set time frame.
- Freeze Members—Enter a number. Members are frozen when they create this much content in your set time frame.
 - (1) Important: When members are frozen, they're frozen in all communities that they're a member of.

Emails are sent to users with the "Moderate Community Users" permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.

4. Click **Save** to apply your changes.

Example: Let's use the following rate rule as an example.

Applies To: Posts and private messages

Member Criteria: Customer users created in the past 7 days

Content Creation Time Frame: 3 minutes

Notify Moderators:6

Freeze Members:10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✓	×
6 posts	✓	×
6 comments	×	×
8 posts and 2 private messages	✓	✓
10 posts	✓	✓
10 comments	×	×

A rate rule with these values protects the community from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

Applies To: Private messages

Member Criteria: Customer users created in the past 3 days

Content Creation Time Frame: 15 minutes

Notify Moderators: 1

Freeze Members: 3

This rate rule protects the community from spammers that attack via private messages.

My rate rule didn't do anything. What's going on?

Give it time. Rate limit rules might not seem exact, but they are. Trust us. For example, say you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without community contributions. After a members first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

SEE ALSO:

Create Member Criteria to Moderate Your Community

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by before triggers. For example, if a before trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules to review and approve content execute before database saves. These rules execute before rules that replace content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

SEE ALSO:

Apex Developer Guide: Triggers and Order of Execution

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the quidelines of the community.

Members can post or comment on any record types that have a feed. The moderation rules configured for your community catch any posts or comments that don't meet the rules' criteria. Flags on a record feed are only visible from within the community that flags them. You can also turn off moderation rules for internal users so that their feed activity isn't flagged.

- 1. Enter **Communities Settings** in the Quick Find / Search bar.
- 2. Click the box next to Moderation applies to all feed posts regardless of where they are visible.
- 3. Click Save.
- **Example**: Enable Record Feed Moderation from Communities



EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view, create, edit, and delete rules:

 "Create and Set Up Communities"

AND

Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content in two places: directly in the community feed or in Community Management.

To set up a moderation rule to review and approve posts and comments, go to **ModerationRules** and create a content rule that uses the Review action. Here are some ways that you can use rules to review content:

Self-Service Community

Does your community allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your community? Use member criteria that includes only your guest user profile and filters for members that have never contributed to the community.

Partner Community

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employee Community

Does your community require HIPAA compliance? Set up your rules to review posts and comments from all your employees.



Note: Users must have Manage Communities or Create and Set Up Communitiespermissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments in your community:

Use a preconfigured Insights report in Community Management.

Use the Pending Insights report provided in the Salesforce Communities Management package. This report lets you see all the posts and comments that are pending review in your community. The Insights report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review in the community feed:



Note: An author can see a pending comment on a pending post only if the author posted both.

 "Can Approve Feed Post and Comment"

To approve, delete, or edit posts and comments that are pending review in Community Management:

 "Can Approve Feed Post and Comment"

AND

"Access Community Management" OR "Manage Communities" OR "Create and Set Up Communities"

AND

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

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the Dashboards and Insights Package.

• Approve posts and comments directly in the community feed.

In the community feed, users with the "Can Approve Feed Post and Comment" permission see an extra action in the post or comment drop-down menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

SEE ALSO:

Create Content Rules to Moderate Your Community

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and take action. Group owners or group managers, can view flags and take action on items in their groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and decide whether to take action.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files if necessary.
- If Allow members to flag content is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged posts and comments:

- View flagged posts and comments from the Moderation Overview Home App.
- Use a preconfigured Insights report in Community Management.

Use the Flagged Posts and Flagged Comments reports provided in the Salesforce Communities Management package. These reports let you quickly manage your community's flagged posts and comments. You can see the content of the post or comment and then remove the flag or delete it. You can also select multiple items at once.

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the Dashboards and Insights Package.

• Use the flagged feed in Chatter.

If you're using a Salesforce Tabs + Visualforce community, you can see a list of flagged posts and comments using the Chatter menu in your community. The Allow members to flag content preference must be enabled to see the Flagged feed.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

 "Moderate Communities Feeds"

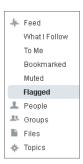
To moderate posts and comments in Community Management:

 "Access Community Management" OR"Moderate Communities Feeds"

AND

"Manage Communities" OR "Create and Set Up Communities"

AND



- Moderate using a custom list. You can expose a list of flagged posts and comments using the Chatter REST API or ConnectApi in Apex.
- Click on a link to the post or comment from the notification email.
- Moderate directly within context of the community by removing flags or deleting content in the feed.
- Tip: To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

SEE ALSO:

Chatter REST API Developer Guide Apex Developer Guide

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or offensive content. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if Allow members to flag content is enabled for their community.
- If Allow members to flag content is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged files:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management.

Use the Flagged Files report provided in the Salesforce Communities Management package. This report lets you see the name of the flagged file, who created it, who flagged it, and how many flags the file has. You can click a link to open the file and review the content. Then you can remove the flag or delete the file. You can also select multiple items at once.

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the Dashboards and Insights Package.

- Moderate using a custom list. You can expose a list of flagged files using the Chatter REST API or ConnectApi in Apex.
- Moderate directly within context of the community by removing flags or deleting content on the file detail page.

Tip: To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

To limit the size and types of files allowed in your community, go to the **AdministrationPreferences** page.

SEE ALSO:

Chatter REST API Developer Guide Apex Developer Guide

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:

 "Moderate Communities Files"

To moderate files in Community Management:

"Moderate Communities Files"

AND

"Access Community Management" OR "Manage Communities" OR "Create and Set Up Communities"

AND

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

The "Moderate Communities Chatter Messages" permission allows users to see the contents of messages, remove flags, and delete messages only in communities they're a member of. With this permission, only flagged messages can be deleted. The "Modify All Data" permission allows moderators to remove flags or delete a message in the SOAP API.

Ensure that your moderators are assigned the "Moderate Communities Chatter Messages" permission, *not* the "Manage Chatter Messages" permission. The "Manage Chatter Messages" permission allows users to see *all* the messages in your entire Salesforce org. Avoid security and privacy concerns; double-check that your moderators and managers have the right permission.

- (1) Important: Keep these limitations in mind:
 - Community members can't flag messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
 - Users can't flag messages in your internal organization, in Salesforce1, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management.

Use the Flagged Private Messages report provided in the Salesforce Communities Management package. This report lets you track trends and stay on top of message spamming attacks in your community. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to unflag messages and delete messages.

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the 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 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:

SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To moderate messages in Community Management:

"Moderate Communities Chatter Messages"

AND

"Access Community Management" OR "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 view the contents of a flagged message in reports:

 "Moderate Communities Chatter Messages"

To remove flags or delete messages in the SOAP API:

"Modify All Data"

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 Community Moderation Rules.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags in Community Management, query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on either Feedltem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment,
 FeedItem, ChatterMessage, or ContentDocument as the parent.

Example: This trigger automatically flags posts in your community that contain *BadWord*.

A similar trigger on comments would look like this.

SEE ALSO:

SOAP API Developer Guide

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create triggers:

"Modify All Data"

Organize Self-Service Communities with Topics

Navigational and featured topics are a fantastic way to organize content in a community. Use topics to structure your community content or highlight key discussions. You can create topics or use the topics that organically emerge from community member posts. You can use topics in the communities built using the Customer Service (Napili) template.

In Community Management, choose navigational topics and subtopics to provide a consistent map of your community. Use featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

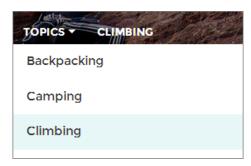
In a self-service community, the Customer Service (Napili) template specifies the layout and design of navigational, featured, and member-created topics.



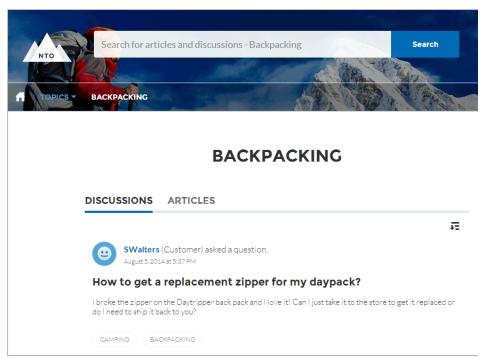
Tip: To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.

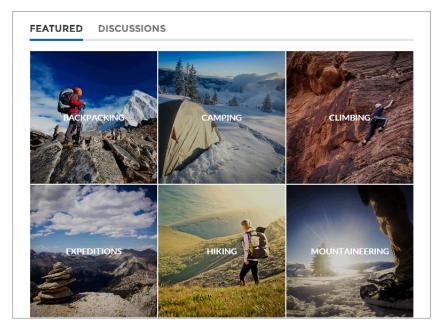


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



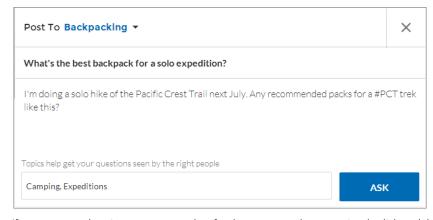
Featured topics

Featured topics are accessible from the body of your community home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Community Builder appears.)



Member-created topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)



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.

IN THIS SECTION:

Manage Topics in Communities

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.

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

Translate Topics Names and Descriptions for Communities with International Audiences

Use the Translation Workbench to translate navigational and featured topics, and topic descriptions, in international communities.

Manage Topics in Communities

USER PERMISSIONS		EDITIONS
To access the Community Management page:	"Manage Communities" OR "Create and Set Up Communities"	Available in: Salesforce Classic Available in: Enterprise, Performance, Unlimited,
To create topics:	"Create Topics"	and Developer Editions
To merge topics:	"Merge Topics"	
To delete topics:	"Delete Topics"	
To rename topics:	"Edit Topics"	

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. Open Community Management.
- 2. Click TopicsTopic Management.
- **3.** Do any of the following:
 - To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description, which will boost SEO.
 - To combine existing topics, click Merge.

Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded.

ullet To rename or delete an existing topic, or add a description to it, click ${\mathscr O}$.

If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.



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

SEE ALSO:

Set Up Navigational Topics
Set Up Featured 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. Open Community Management.
- 2. Click TopicsFeatured Topics.
- **3.** Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.
 - Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.
- **4.** Hover over a topic name, and click **1.** Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.
 - (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)
- **5.** Repeat steps 3 and 4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

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

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

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"

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

- 1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**, and enable topics for all the article types you want to include.
 - Note: Enabling topics disables public tags on articles. Personal tags aren't affected.
- 2. Open Community Management.
- 3. Click TopicsNavigational 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.
 - (1) 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 **1.** Then click **Upload banner image**, and select an image that appears across the top of the topic page.

(Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.)

- **7.** Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.
- **8.** Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.

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

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

- 1 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:

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 hierarchy of navigational topics you've created for the community. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

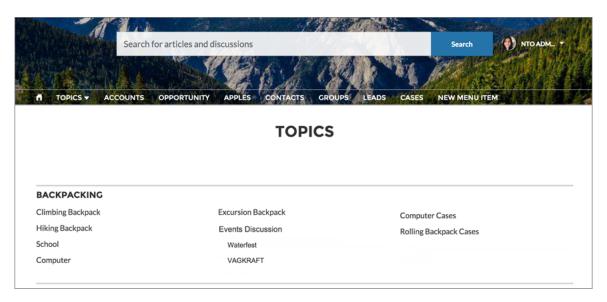
How is the topic catalog useful to your community members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any community user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select the **Add the "More Topics…" link** when editing the navigation menu on the home page.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your community's pages, drag and drop the Breadcrumb component on the page in Community Builder.





SEE ALSO:

Set Up Navigational Topics

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

- 1. Open Community Management.
- 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.
- Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic

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"

Translate Topics Names and Descriptions for Communities with International Audiences

Use the Translation Workbench to translate navigational and featured topics, and topic descriptions, in international communities.

- 1. From Setup, enter *Translate* in the Quick Find box, then select **Translate**.
- 2. Select the Language you're translating into.
- **3.** For Setup Component, select Managed Topic.
- **4.** For Aspect, select **Field Label** to change the topic name, and **Description** to change the topic description.
- **5.** In the *Community Name* column, expand a community to see its master topic names.
- **6.** To enter language-specific names for navigational and featured topics, double-click in the *Topic Name Translation* column.

Consider the following when you're using the Translation Workbench:

- There is no Metadata API support for translated topic names or descriptions.
- While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
- Modifying topic names from Community Management only changes the English community.
 All translated topic name and description changes must be made using the Translation Workbench.
- If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To translate topics:

 "View Setup and Configuration"

AND

Be designated as a translator

- When topics names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.
- Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

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.

- **1.** Open Community Management.
- 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 Customer Service (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.

The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a {!userId} context variable in your URL,

https://www.example.com/doSurvey?userId={!userId}. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

Recommendations support these context variables.

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"

Context Variable	Description
{!actionLinkId}	The ID of the recommendation link that the user clicked.
{!actionLinkGroupId}	The ID of the recommendation link group containing the recommendation that the user clicked.
{!communityId}	The ID of the community in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, "000000000000000000".
{!orgId}	The ID of the org in which the user clicked the recommendation.
{!userId}	The ID of the user that clicked the recommendation.

- Audience—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.
 - Tip: To create an audience that appears in this drop-down list, in Community Management select **RecommendationsAudiences** 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 Customer Service (Napili) template, disabled recommendations no longer appear.

6. Click Save.

Tip: To remove a recommendation, in Community Management, select **RecommendationsRecommendations**, and click the recommendation name. At the bottom of the recommendation details, click **Delete**.

IN THIS SECTION:

Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

SEE ALSO:

Update Your Community's Template

Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

- 1. Open Community Management.
- 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 Ul. Add and remove members through the API.

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"

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 **RecommendationsAudiences**, 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

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other community members so that they know how influential you are. When you start out in the community, you are at the lowest level. As you become more active in the community, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level. You increase your reputation by:

- Posting
- Commenting
- Liking a post or comment

EDITIONS

Available in: Salesforce Classic

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

- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

IN THIS SECTION:

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.



Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

- 1. Open Community Management.
- 2. Click AdministrationPreferences.
- 3. Select Enable setup and display of reputation levels, then click Save.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Points
1
1
5
1
5
1
5
1
If your post contains more than one @mention, you get a point for each @mention.
5
1
5
5

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

Action	Points
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation section doesn't appear in Community Management. To show the Reputation section, go to AdministrationPreferences and select Show all settings in Community Management.

SEE ALSO:

Set Up Reputation Levels

Set Up Reputation Points

How is my community reputation calculated?

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.



Note: A community must have at least three reputation levels and can have up to 50.

- 1. Open Community Management.
- 2. Click ReputationReputation Levels.

From here you can:

Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.



Note: You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

- Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
- Edit the point range for a level.

When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking **Add a level**, located underneath the list of levels.
- Remove a level by clicking a next to the level.
- 3. Click **Save** to apply your changes.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update reputation levels:

"Manage Communities" AND

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the Reputation Level setup component and then expand the node next to your community.

SEE ALSO:

Set Up Reputation Points

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.



Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update reputation points:

"Manage Communities"
 AND

Action	Points
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. Open Community Management.
- 2. Click ReputationReputation Points.
- 3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to 0.
- 4. Click Save.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.



Tip: You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Set Up Reputation Levels

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.



Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.



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

Points
5
1
5
1
5
1 If your post contains more than one @mention, you get a point for each @mention.
5
1
5
5
5
20
5
20

SEE ALSO:

Enable Reputation in Your Community

Community Reporting

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

IN THIS SECTION:

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.

EDITIONS

Available in: Salesforce Classic

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

Set Up Report Management for External Users—Create and Edit Reports

Community partner and customer users can create and edit reports in their own personal folder or in a privately shared folder if they have sufficient permissions. You can grant partner and customer users permissions to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

Track Community Activity

Create custom reports to track usage, moderation, and other community activity.

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:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Take immediate action on recent activity with Insights reports



Note: To use the preconfigured Insights reports, your community must use Chatter.

Install one of the following versions from the AppExchange:

- Salesforce Communities Management (for Communities with Chatter)
- Salesforce Communities Management (for Communities without Chatter)
- 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 org. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management, 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. After installation, here's what you see in Community Management.

Navigation Section	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.	

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To install AppExchange packages:

"Download AppExchange Packages"

Navigation Section	Page Name	Description	Requires Chatter
	Activity	See metrics about posts, comments, daily unique contributors, and which types of members are contributing posts and comments.	✓
	Custom Recommendations	See how your community's custom recommendations are doing and how often the recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.	✓
	Files	Track content uploads, downloads, engagement, and content creators.	✓
	Groups	Monitor membership and post-and-comment activity in 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 Customer Service (Napili) template.	✓
	Topics	See metrics about the navigational and featured topics in your community.	✓
Engagement	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.	✓
	Group	Identify groups with deactivated or inactive owners and groups that have been or will be archived soon.	✓
	Topics	Keep an eye on recent topic activity in your community.	✓
	Files	Monitor file uploads and downloads, including files receiving many comments.	✓
	Self-Service	Track questions and answers in user profiles, including questions escalated to cases. This Insights page is great for communities using the Customer Service (Napili) template.	✓
Moderation	Flagged	Track flagged posts, files, messages, and content flagged by moderation rules.	✓
	Pending	Manage posts pending approval.	✓
	Members	Monitor spammers or new members.	✓
	Audit Trail	Audit moderation, including flagging by users, moderation rules, and moderator actions.	✓

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.

SEE ALSO:

Enable and Map Insights for Community Managers
Enable and Map Dashboards for Community Managers
What's the difference between Insights and dashboards?

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.

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"

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"

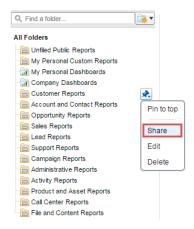
You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner.



- 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. If you want your community managers to see your report in Community Management, you can create or edit a dashboard to include your report and then map the updated dashboard in Community Management. To change the mapping of a dashboard, click **DashboardsSettings**.



Available in: Salesforce Classic

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



Note: Only reports that are based on the Networks object show community-specific information on the Community Management page. Using reports based on the Networks object, means you can create one custom report and use it across all your communities.

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	

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description Create reports on posts and comments that your members have edited.	
Chatter Usage	Networks > Feed Revisions		
Chatter Usage	Networks > Groups	Create reports on the groups in your community.	
Moderation	Networks > Network Audits	Create reports on all moderation activity and history in your community.	
		To report on moderation activity in private Chatter messages, filter the report by Audited Object Type (on the Network Audits object) to equal Chatter Message.	
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on members in your community who either flagged items or moderated a flagged item.	
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the members in your community whose items were flagged, blocked, or replaced.	
Moderation	Networks > Network Members > User Login	Create reports on frozen members in your community.	
Moderation	Networks > Network Moderations > Content Documents	Create reports on content that is currently flagged in your community. These reports allow you to see the	
	Networks > Network Moderations > Feed Posts	actual contents of the flagged item. For example, you can see the contents of a flagged private message to	
	Networks > Network Moderations > Feed Comments	easily determine if the message is spam.	
	Networks > Network Moderations > Private Messages		
Moderation	Networks > Unpublished Feed Entities > Feed Posts	Create report on posts that are pending review and approval.	
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public community page views and unique visitors.	
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage in your community.	
Topic Activity	Networks > Topics	Create reports on the topic activity in your community.	
Topic Activity	Networks > Topic Assignments	Create reports on the topic assignments in your community.	
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.	
User Activity	Networks > Network Members > Login History	Create reports on community login activity. This report only includes direct logins to the community. If a user logs in to an org and then switches to a community, their login activity isn't included.	

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
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.

¹To report on Chatter Messages, you must have the "Moderate Communities Chatter Messages" permission.



Note: You can create reports based on other objects and expose them in Community Management. Just keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

SEE ALSO:

Report on Communities with the 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		Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to Your Name > Edit Contact Info, then click About	Everyone see these fields unless your administrator enables nickname display or creates a custom page that displays this information. If your administrator has enabled nickname display, your nickname displays in place of your first and last names in most locations.	N/A
Title	External	Go to Your Name > Edit Contact Info, then click About	Employees, external, or public	UserPreferencesShowTitleToExternalUsers UserPreferencesShowTitleToGuestUsers Note: When the guest user preference is set to true, the job title field is visible to external members even if the external member preference is set to false.
Profile photo	External. Users without access see the stock photo.	page, click Update	External or public	UserPreferencesShowProfilePicToGuestUsers

Contact Information		Where to Set in User Interface	Options for Restricting Visibility	API C	ontrols on User Object
		publicly accessible pages			
City Country Email Fax Mobile Phone	Employees	Go to Your Name > Edit Contact Info, then click Contact	Employees, external, or public	9	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.
State Street Address				User	PreferencesShowCityToExternalUsers PreferencesShowCityToGuestUsers PreferencesShowCountryToExternalUsers
Work Phone Zip/Postal Code				User User	PreferencesShowCountryToGuestUsers PreferencesShowEmailToExternalUsers
				User	PreferencesShowEmailToGuestUsers PreferencesShowFaxToExternalUsers PreferencesShowFaxToGuestUsers
				User	PreferencesShowManagerToExternalUsers PreferencesShowManagerToGuestUsers
				User	PreferencesShowMobilePhoneToExternalUsers PreferencesShowMobilePhoneToGuestUsers PreferencesShowPostalCodeToExternalUsers
				User	PreferencesShowPostalCodeToGuestUsers PreferencesShowStateToExternalUsers
				UserP	PreferencesShowStateToGuestUsers referencesShowStreetAddressToExternalUsers PreferencesShowStreetAddressToGuestUsers
					PreferencesShowWorkPhoneToExternalUsers PreferencesShowWorkPhoneToGuestUsers

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.





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

Search capabilities in communities can make or break a member's experience. Search in communities is different depending on whether your community is using a Community Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within a community return results specific to that community.



Note: To be searchable in communities, objects must be searchable in Lightning Experience and supported in community templates.

For all communities:

Search behavior in communities is different from searches in the internal org:

- In general, searches within a community return matches from within the community. To find items from a different community, members must leave the current community and search from within the other community.
- In community search results, members can see what they have access to through their profiles and permission sets. In addition, they can also view data that is explicitly shared with them in the community context. This can include internal company content and records not explicitly shared with the rest of the community. For example, if the user's profile allows access to accounts, but the accounts tab isn't exposed in the community, the member can still view account data in their search results.
- For user searches performed by external users of a community, global search and enhanced lookup search (with the All Fields option selected) guery the following limited set of fields:
 - Name
 - Username
 - User ID
 - Body
 - Email
 - Phone
 - Custom fields

For example, say an external community member searches for a user, John Doe, by his alias jdoe. If that term isn't contained in any of the searchable fields in the user object, John Doe's record isn't included in search results.

- Search results include all the records and files that a community member has access to. This includes records not explicitly exposed in the community or records and files they have access to in the internal Salesforce organization. In file searches, users can see:
 - Files they own
 - Files shared with them directly
 - Files they have access to in a library
 - Files that are posted to a record they have access to
 - Files that are posted to groups or shared with that community
- The admin must enable search result filters for an object in the internal org for it to be searchable in a community. To make custom objects searchable, the object must be associated to a tab in the internal org.

For communities using the Koa and Kokua templates:

- The Featured Search component lets community members search for articles within a specific data category.
- The Article List component shows the search results based on the search term entered in Featured Search.

For communities using the Customer Service (Napili) template:

The Search Publisher component lets community members enter search terms in the community.

Classic

EDITIONS

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

Available in: Salesforce

- The Search Results component shows a list of search results limited to articles and discussions.
 - Note: Only articles that have a topic associated to them in Community Management populate in the Search Results component.
- The Global Search Results component lets members see search results in one tab (All), or in separate tabs for cases, accounts, contacts, and any other object exposed in the community (including custom objects) to which they have access.
 - Note: Admins must associate a tab to a custom object to make it searchable in global search.

For communities using Salesforce Tabs + Visualforce:

- If Chatter is enabled in your org, global search and contextual feed search are enabled by default in all communities.
 - With global search, members can search for records, files, people, groups, topics, and feed posts and comments.
 - Feed search () is helpful when members want to look for information in a specific feed context. Groups, user profiles, records, and the community feed support feed search.
- If Chatter isn't enabled, sidebar search is enabled in all communities.
 - Sidebar search doesn't support searches for items specific to Chatter, such as feeds, groups, files, topics, and user profiles.

Manage Your Community Email Notifications

Use email notifications to keep up with important updates in communities.

You can choose to receive email notifications whenever someone posts on your profile, comments after you on a post you've commented on, posts to a group you belong to, and more. Email notification preferences are set by community.

To set your email preferences, go to your profile page within a community, click the 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

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.

someone posts. This option is visible if you're a group member.

- If your community has Chatter messages enabled, you're notified of file shares in a 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:



Available in: Salesforce Classic

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

Email Notifications About	Required Permission	
Flagged posts and comments	"Moderate Communities Feeds"	
Flagged files	"Moderate Communities Files"	
Flagged Chatter messages	"Moderate Communities Feeds" and "Moderate Communities Chatter Messages"	

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.

	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.	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.	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.

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)
	Can see communities in Preview status.	Can see communities in Preview status if a link is provided.	
Your Name menu in Global Header	Same as in internal organization.	Same as in internal organization. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal organization and all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
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

	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)
Profiles and people hovers	Can see all contact information f and Email) on all community me user always sees members' Title, fields.	mbers' profiles. In people hovers,	Can see all members' First Name, Last Name, and Nickname fields and profile photos, but can only see additional contact information fields that members have chosen to show to external users. By default, Title is shown while all other fields are not. In people hovers, user sees Title, Work Phone, and Mobile Phone fields only if the member has chosen to show them.
Records (such as accounts, leads, opportunities)	Can see records they 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 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	are shared with them directly, th or that are posted to a record the	ed with an entire community can	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	d record recommendations for the	current community only.
Activity and Influence	All activity on records, such as po	uence for the current community. osts and comments, is counted in and not in the community where	Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is not

Favorites

Can add only topic favorites in

the current community.

Salesforce Administrator Salesforce Community External Community Member (all Salesforce Member (Customer Portal, licenses including Chatter Partner Portal, Partner Free and Chatter Only) Community, or Customer **Community license)** counted in the user's activity statistics and influence. **Email Notifications** Email notification preferences Email notification preferences Email notification preferences are set by community. Within a are set by community. Within a are set by community. Within a community, users can control community, standard Salesforce community, external users can their Chatter email notifications user can control their Chatter control their Chatter email in their personal settings. email notifications in their notifications under Your Name > My Settings > Email personal settings. Can control email notifications **Settings**. Portal users can also for their internal organization Can control email notifications control group email notifications from their personal settings. for their internal organization on each group's page. (Enter Chatter in the from their personal settings. Quick Find box, then select (Enter Chatter in the Chatter personal email digests **Email Notifications.**) Ouick Find box, then select are not supported in **Email Notifications**.) Communities. Group digests are Within a community, all users supported, but the option to can control group email Chatter Free user can control receive email notifications for notifications on each group's Chatter emails for their every post is disabled when communities under Your page. groups exceed 10,000 members. Name > My Settings > Email Chatter personal email digests All members who had this **Settings**. The chosen settings are not supported in option selected are apply to the current community. Communities. Group digests are automatically switched to daily supported, but the option to Within a community, all users digests. receive email notifications for can control group email every post is disabled when notifications on each group's groups exceed 10,000 members. All members who had this Chatter personal email digests option selected are are not supported in automatically switched to daily Communities. Group digests are digests. 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,

Can add search, topic, and list view favorites in the current

community.

Trending Topics, and Recently Talked About topics for the current community only.

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, 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 the current community.	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 Can mention people spe mention an external user on an internal post. the current community.	
Share a post (repost)	Can share a post only in the curi	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 C Member	Community External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
People	People specific to the current community.	
Users	· · ·	
	 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 privat Files shared with the entire community Visibility in any community: Files posted on accessible records and record 	 Files shared with the user in a public or private group

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
		ry files that the user has access	Visibility in any community:
	to Files owned by a user are always wuser, regardless of how they were		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 cor	mmunity.	
	Global search returns informatior information from within the cont a user's profile, a record, or a ground must search from within that cor	text where the search is perfor up. To find information in a dif	med, such as from the feed on
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	nd 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.

SEE ALSO:

Salesforce Communities Overview

INDEX

A	Communities (continued)
	dashboards 156
Action Layout	dashboards vs Insights 159
customizing 76	dashboards, create 157
Authentication	dashboards, customize and view 159
Communities 83	dashboards, enable and map 156
C	deactivating 44
	default roles 8
Case Feed	description 43
creating portal posts 70	email 30
Case post visibility 68	email notifications 213
Chatter Answers	enabling 7
enabling in Communities 72	enabling cases for external users 63
Chatter Questions	enabling leads for partner users 80
enable in Communities 71	enabling nickname display 35
communities	enabling reputation 198
feed search 212	error pages 37
field service 82	external data sources 141
global search 212	external user passwords 46
partners 52	External users
planning 3	46
references 1	resetting community passwords 46
resources 1	file limits 34, 38
search 212	global header 39, 211
sidebar search 212	Insights 160, 163, 170
Communities	Insights, creating 163
about 2	Insights, creating actions 164
about high-volume community users 11	Insights, enabling 162
actionable Insights 164	Insights, viewing 168
activating 41	knowledgeable people 34
adding a global search box 53	login 54–55
approvals for external users 81	logout 54, 58–59, 92, 94
authentication 82–83, 86–87	management 149, 155
branding 28, 55	manager 151
Chatter tab 28	managing high-volume users 13
Community Builder 90	members 24
Community Management 147	merge fields 32
Community Management home dashboard 157	moderating, files 184
create record list view 125	moderating, nies 164 moderating, posts and comments 182
creating 19	moderation 169, 172
creating users 15	moderation content criteria 173
custom pages 54	
Customer Service (Napili) template 101	moderation criteria 172
customizing 23	moderation execution 179
customizing with Force.com Sites 91	moderation member criteria 174
customizing with Site.com 90	moderation rate rules 177
	moderation rules 175–176, 180

Index

Communities (continued)	Communities (continued)
moderation triggers 186	templates 98
moderation, messages 185	tips for using Site.com 90
moderation, review posts 181	topic catalog 192
moderator 151, 153	topics 187, 189–191, 193
name 43	tracking activity 206
navigating to 211	types of moderators 152
person accounts 61	URL 43
preferences 34	Wave Analytics 82
previewing 40	who can see what 214
private message 34	Communities Landing page
public access 36	custom 95
rate limiting 177	Communities login
rate rules 177	authentication providers 56
recommendation audiences 196	customize 56
recommendations 194	SAML 56
report options for external users 10	single sign-on 56
reporting 202, 206	Communities Moderation
reporting for external users 205	defining triggers for flagging items 186
reports, create 205	Communities Setup
reputation 196	choosing between tabs and the Community Builder 27
reputation calculation 201	Communities users
reputation levels 199	creating 15
reputation points 200	enabling cases for 63
review and approve content 181	enabling leads for 80
Salesforce Knowledge 78	Community Builder
search engine optimization 47–50	add markup 122
security 82–83, 86–87	brand 104
self-registration 54–55, 60–61	change content layout 120
SEO 47–50	create pages 107
set up Chatter Questions 71	create record detail page 127
setting email notifications 213	create record list view 125
setting up Chatter Answers 72	custom theme layout 131
setting up Ideas 79	delete pages 124
settings 6, 43	device presets 145
share groups 14	edit pages 117
share record data 124	export a page 139
share record details 127	export a template 137
sharing a preview URL 40	external data sources 141
Sharing high-volume portal user records 14	Lightning Bolt 133, 135, 137, 139
sharing personal contact information 208	navigate 103
statuses 41	packaging 133, 137, 139
super user access 9, 18	packaging considerations 135
super user access for customer users 18	Page Editor 117
supported 99	page export 133, 135, 139
supported browsers 3	page head 122
tabs 26	Page Manager 106–107, 115, 121, 124
template, changing 45	page properties 106, 115, 121
template, considerations 46, 145	page types 115

Index

Community Builder (continued)	D
page variations 110, 112	
page visibility 110, 112	delegated administration
preview 145	community users 17
profile-based page visibility 110, 112	E
public access 113	_
publish 146	Email notifications
share record data 124	Communities 213
template export 133, 135, 137	error message 118
theme layout 131	Escalate Question to Case 75
Community case feed 64, 66–68	Escalate to Case
Community Case Feed 67	access 75
Community Management 149	F
Community Manager 150	•
Community Managers	file limits
dashboards 156	Communities 38
dashboards, create 157	Force.com Sites
dashboards, customize and view 159	using with Communities 91
dashboards, enable and map 156	C
Insights, creating 163	G
Insights, creating actions 164	Global Header
Insights, enabling 162	for Communities 39
Insights, viewing 168	groups in communities 128
Community members	Guest user profile 142
updating with the API 25	1.1
Community Moderators 147	Н
Community Reputation	High-Volume Community Users
enabling 198	granting access to records 13
community self-registration	managing users 13
create person accounts 61	sharing records 14
Community settings 142	sharing sets 13
Community template 143	High-volume portal users
Community Templates	sharing records or users 10
self-service 97	1
Templates	I
97	Ideas
self-service communities 97	enabling in Communities 79
Community users	Insights
delegating administration 17	actions 164
content criteria 173	create 163
criteria	customize 168
content 173	view 168
member 174	
Custom Domain 53	L
Custom URL 53	Lightning Bolt 133, 135, 137, 139
customize pages 92	Lightning Partner Management 52
customize pages 72	Login page
	adding custom 57

Index

M	S
Manager	Salesforce Communities Management package
Communities 151	install 203
member criteria 174	upgrade 203
Moderating	Salesforce Knowledge
Communities 172	Communities 78
Moderator	Salesforce1
Communities 153	recommendation audiences 196
Moderators	recommendations in feed 194
managing files 184	Self-Registration
managing flagged items 182	Apex controller 62
managing messages 185	SEO
K1	Communities 47–50
N	service not available 92
nicknames	Settings area 142
enabling 35	Share groups
	Communities 14
O	Sharing
objects 99	high-volume community user records 14
D	Sharing sets
P	creating 13
partners	editing 13
communities 52	overview 10
Pre-moderation	Site.com
review and approve posts 181	tips for Communities 90
Process Builder 76	using with Communities 90
Profile, guest user 142	Т
Public pages 96	'
0	Template, updating 143
Q	Topics
Question from Chatter 74	adding to articles 193
Question-to-Case	merging 189
enabling 74	translate
processes 76	translation 193
workflows 76	W
Queues 76	
	Wave Analytics
	Communities 82